



T-OAT-ALLY POSITIVE

IMPACT REPORT



A FOREWORD FROM JAMES LEA

Welcome to our first ever T-OAT-ally Positive Impact Report.

Here we explore the UK's attitudes and perceptions of food sustainability and how we can all be greener when it comes to the food we eat and the products we buy.

Focusing on consumer behaviour during a time when climate change and the cost-of-living crisis are key concerns for many, Mornflake surveyed 2,000 Brits to uncover what their priorities are when it comes to sustainability and discover how much we think we know when it comes to being green.

The data we reveal highlights that almost 42% of Brits admit that their understanding on the topic could be improved, and that they do not know much, if anything, about food sustainability.

Nearly half (46%) of Brits do not know what makes a sustainable company and how their buying habits influence their carbon footprint, with only 14% knowing what truly impacts their carbon consumption.

Despite over half of Brits (55%) wanting to become more sustainable, many still struggle due to the lack of transparency from the food industry to appreciate the full journey of an end product.

That's why at Mornflake we are committed to being open on our sustainability journey. We want to make it easy for consumers to have access to more sustainable choices.

This year, we have introduced the reimagined Mighty Oats range - designed to provide positive energy to people and the planet by using healthy ingredients, a carbon neutral milling process, and 100% recyclable packaging. The new mantra 'Positive energy for you and your planet' demonstrates our ongoing commitment to a more sustainable future.

By launching this impact report, we are providing an insight into Mornflake Mighty Oats' achievements so far on becoming greener and being clear about the improvements we are putting in place to achieve this. This is only the start and we have many exciting plans for the future.

We hope you enjoy the report and welcome you to join us on our journey. If you would like to know more about Mornflake Mighty Oats' sustainability credentials and goals for 2023 and beyond, please do visit www.mightyoats.com

IN THIS REPORT, WE EXPLORE THREE KEY THEMES:

1. The public's current knowledge on food sustainability and what they consider when purchasing food items.
2. People's perceptions on carbon and their individual carbon footprint, as well as renewable energy and water consumption habits.
3. What can be done to make food sustainability more accessible for consumers moving forward.

We hope you find this report insightful.



Managing Director of Mornflake

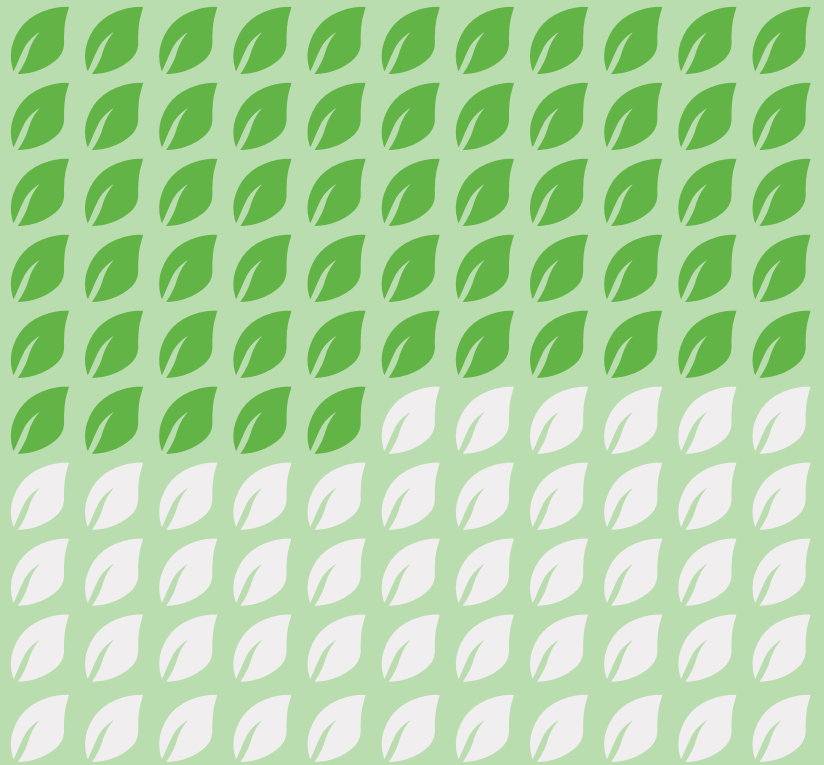
PEOPLE WANT TO BE **GREENER,** BUT STILL DON'T KNOW HOW

Whether it's purchasing food that minimalises food waste, or buying items locally from farm shops and local suppliers, over half of Brits (55%) want to become greener. But, is the industry's lack of transparency holding them back?

Communication seems to be confused when it comes to a brand's sustainable efforts with 46% of those surveyed admitting that they don't know what makes a sustainable company.

On average, consumers are confused by sustainability in food production, with almost 42% admitting that their understanding could be improved, as they do not know much, if anything, about food sustainability and where their food comes from (38%). Perhaps this could be improved by companies providing more clarity on the origin of food products - with over half of Brits (61%) stating this would help them become greener as they'll be able to make informed choices about the environmental impact of their purchases.

OVER HALF OF BRITS WANT TO
BECOME GREENER



WHAT MAKES A
SUSTAINABLE COMPANY?



WHAT DRIVES DESIRE TO
CARE ABOUT THE PLANET?

52%

CONSIDER
MINIMAL FOOD WASTE
AND
MINIMAL PACKAGING
WHEN PURCHASING FOOD

46%

PREFER TO BUY ITEMS FROM
BRITISH
PRODUCERS

2 IN 5

PREFER TO BUY LOCALLY FROM
FARM SHOPS
AND
LOCAL SUPPLIERS

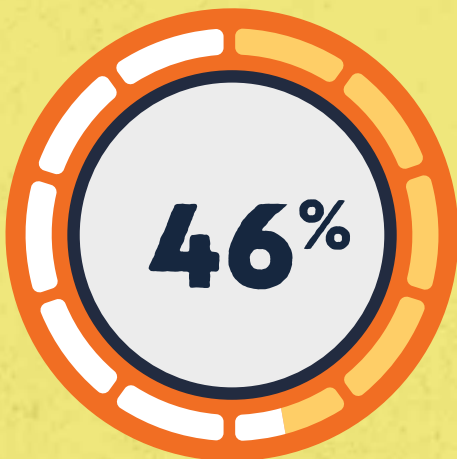
Further to this, it's clear that the environment is a key motivator for Brits to become more sustainable. According to the survey, nearly half of respondents (46%) reported that they wanted to be more sustainable due to caring about the environment, 39% said they want to be more sustainable to have a positive impact on wildlife, and 38% said they want to create less pollution.

When it comes to purchasing food items, consumers consider various factors, with minimal food waste and minimal packaging being the top two concerns for 52% and 51% of respondents, respectively. Additionally, 46% of consumers prefer to buy items

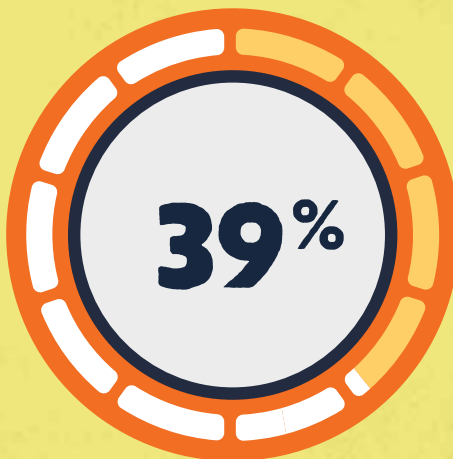
from British producers, while nearly two in five (42%) prefer to buy locally from farm shops and local suppliers. Sustainability is also a key factor, with 41% of respondents considering it when making food purchases.

However, despite these considerations, over a quarter (28%) of respondents reported being rarely aware of where their food comes from beyond the information listed on packaging. This highlights the need for increased transparency in the food industry, as well as more education for consumers on sustainable food practices.

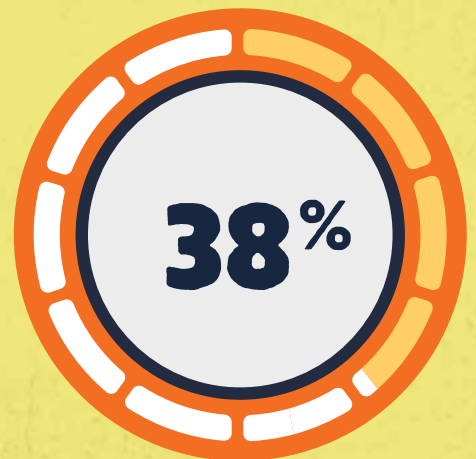
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Nearly half of respondents (46%) reported that they care about the environment



While 39% want to be more sustainable to have a positive impact on wildlife



And 38% said they want to create less pollution

THE WORK TO BE DONE ON CARBON CONFUSION

The food industry has an opportunity to make a positive impact on the environment by reducing its carbon footprint. While food production, transportation, and packaging all contribute to greenhouse gas emissions, the industry can take steps to mitigate its impact on climate change and promote sustainability.

Despite the growing awareness and willingness to reduce carbon footprint among consumers, there still remains a significant level of confusion around the concept of carbon neutrality.

Our survey found that over half of consumers (55%) are actively trying to reduce their carbon footprint, but 38% of them do not understand what carbon-neutral means and only 49% of respondents reported knowing a little about what has an impact on their carbon footprint. In response to this confusion, brands and businesses could prioritise transparency and education for consumers to make informed decisions at the point of purchase.

55%

**OVER HALF OF
CONSUMERS
ARE ACTIVELY
TRYING TO
REDUCE THEIR
CARBON
FOOTPRINT**

SO WHAT DOES CARBON NEUTRAL MEAN?

Carbon neutral refers to the state of achieving net-zero carbon dioxide emissions. This means that the amount of carbon dioxide released into the atmosphere is offset by an equivalent amount of carbon dioxide removal or reduction from the atmosphere.

To become carbon neutral, you must first assess your carbon footprint, which is the total amount of greenhouse gas emissions you produce. Then, from there, you can take steps to reduce emissions through energy efficiency measures, such as using renewable energy to power your home, organisation or business.

Interestingly, the majority of consumers (69%) believe that companies should invest in renewable energy to produce their products, and 70% agree that companies should aim to reduce their water and energy consumption.

The industry's carbon footprint is further exacerbated by food waste, with one-third of all food produced worldwide being wasted. The top three ways that respondents said they reduce their carbon footprint include:



64% REDUCING FOOD WASTE



60% REUSE RECYCLABLE CONTAINERS AND SHOPPING BAGS



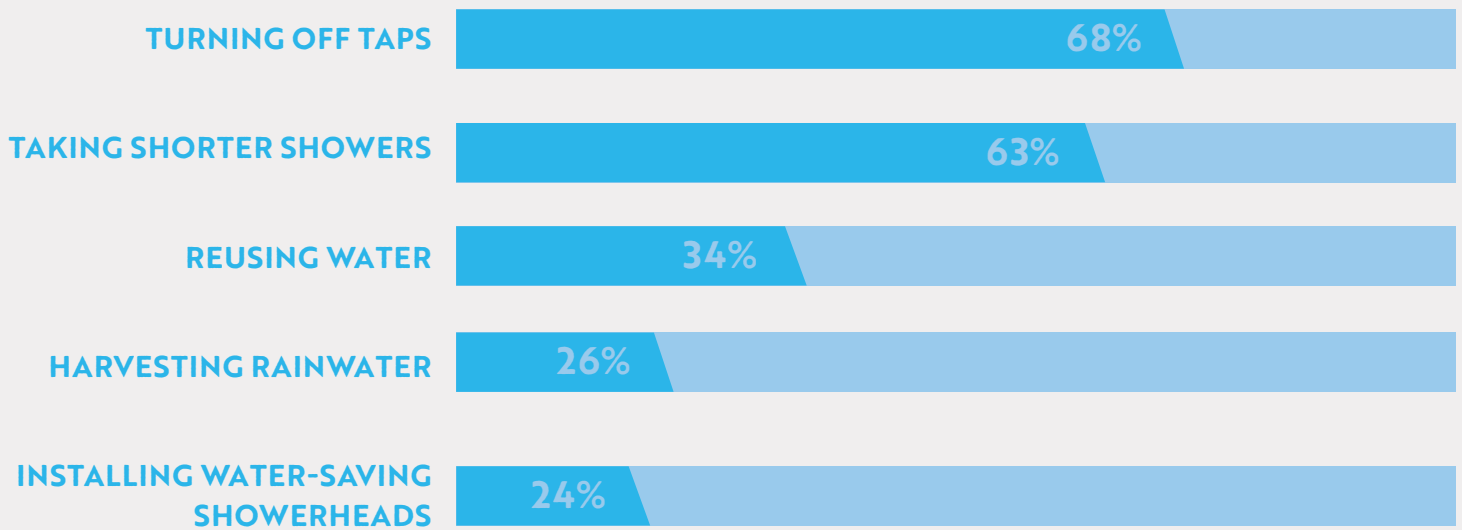
44% BUYING LESS



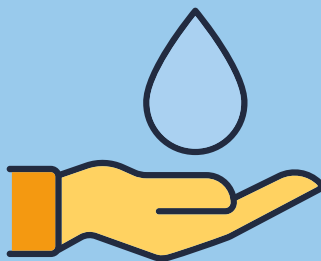
ADDITIONALLY, 40% OF RESPONDENTS REPORTED COMPOSTING FOOD WASTE AS A METHOD TO REDUCE THEIR CARBON FOOTPRINT

Consumers are also becoming increasingly conscious of their water usage, with 71% actively considering the amount of water wastage they produce and how it affects the environment.

THE TOP FIVE METHODS TO REDUCE WATER WASTE THAT RESPONDENTS IDENTIFIED INCLUDE:



REDUCING WATER WASTAGE HAS SEVERAL BENEFITS, INCLUDING:



Saving money:

Reducing water usage can lead to lower water bills, as well as reduced energy bills if you use less hot water



Reducing your carbon footprint:

Water treatment and distribution require energy, and reducing water usage can help to reduce the amount needed to power water treatment, resulting in lower greenhouse gas emissions.

In addition, reducing water wastage can also reduce the amount of pollution in our waterways, less water will need to be treated and discharged into rivers and oceans.

Overall, it's clear that consumers are actively trying to reduce their carbon footprint and are conscious of their impact on the environment. But it's imperative that we address the confusion surrounding

carbon neutrality and brands have a role to play in educating people on sustainable practices by being transparent about their carbon impact and investing in renewable energy.



MAKING FOOD SUSTAINABILITY ACCESSIBLE

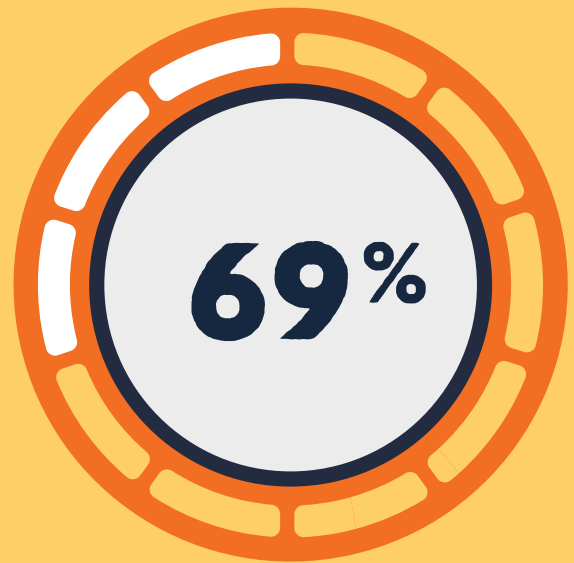


The issue of food sustainability has become increasingly important to consumers, with many seeking ways to reduce their environmental impact. However, our study found that many Brits face obstacles when trying to adopt more sustainable practices in their daily lives.

One of the biggest barriers to adopting more sustainable practices is cost, with half (50%) of respondents citing it as a reason for not being greener in their day-to-day life. Additionally, 72% of respondents said that companies need to make their sustainable products more affordable. It's important that we find ways to make sustainable products affordable, so consumers are able to make more eco-friendly choices and not have to compromise due to price points.

65%

OF CONSUMERS BELIEVE THAT
FOOD COMPANIES SHOULD
ENSURE THERE IS 0% WASTE
WHEN PRODUCING PRODUCTS



NEARLY THREE QUARTERS OF
RESPONDENTS AGREED THAT BRANDS
SHOULD ALWAYS USE SUSTAINABLE
PACKAGING

Nearly three quarters (69%) of respondents agreed that brands should always use sustainable packaging. Consumers are more aware of the impact of packaging on the environment, and are calling on companies to make changes to reduce their environmental footprint.

The study also found that consumers are concerned about food waste, with 65% believing that food companies should ensure there is 0% waste when producing products. People are savvy to the ever growing issue surrounding food waste, and they want companies to take responsibility in starting to reduce it.

Whilst consumers are becoming more conscious of their environmental impact when purchasing food, there's still a need for education. **57%** of respondents agreed that they need to be educated on the environmental impact of food and this is where brands can drive change. Making food sustainability accessible to consumers is a complex issue that requires collaboration from various third parties to help solve it. However, there's certainly plenty that can be done from consumer facing brands to help educate on the matter.

Finally, despite wanting sustainable products that are affordable and transparent, consumers also want them to retain their quality and flavour with over a third (**41%**) prioritising taste over sustainability. It is clear that companies need to find ways to balance these competing demands, if they want to remain relevant in the eyes of consumers and reduce their environmental impact.

The research shows that whilst a majority of people are aware of the environmental impact of food production (69%) and are willing to become more environmentally friendly, the lack of transparency and confusion surrounding sustainable practices in the food industry is holding back consumers from making informed purchasing decisions. The report emphasises the need for more education and

transparency to help consumers understand the impact of their purchases and encourage sustainable behavior.

Overall, there's a call for increased transparency, education, and accessibility to promote sustainability and encourage businesses to play a more active role in promoting sustainable practices.

T-OAT-ALLY POSITIVE IMPACT

Here's how we're taking responsibility for our actions and being open on the sustainable practices we have in place:

Completely carbon neutral since 2012. Our 100% British oats are milled using

renewable energy

generated by our very own wind turbine and solar farm, assessed and measured by leading climate action solutions provider, Climate Partner

We've already hit (and beat!) our 20 year targets. Mornflake reduced

carbon emissions by 27% and **water consumption by 28%**

ZERO WASTE.

Any by-product from Mornflake Mighty Oats is repurposed for animal feed and biofuel

We've been invested in renewables since 2005 and set a 20 year reduction target that included

reducing energy and water consumption by 25%

Through our own renewable electricity, we've generated over 58 million kwh, this is the equivalent to powering the below for a whole year:

0.5m TVs
40K showers
21K homes

100% recyclable packaging

that can easily be recycled by UK recycling systems

We know we're not perfect, and our sustainability journey doesn't stop here. As we approach our 350th anniversary in 2025, we're excited to share our next sustainability targets that will help us make further improvements to become greener, and keep providing positive energy for our customers, and the planet.