Vol. 11 No. 1, pp. 91–110 March 2024

Canadian Food Studies La Revue canadienne des études sur l'alimentation

Original Research Article

Beef, beans, or byproducts? Following flexitarianism's finances

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Abstract

Flexitarianism was one of the top food trends of the summer in 2020. Characterizing reductions in meat eating as representative of the reflections on personal and societal health that were taking place at the time, Canada's largest food retailer, Loblaw situated the company's expanded plant-based offerings as a response to a "new us" that was emerging from the COVID-19 pandemic. This article explores the protein pathways that Loblaw opens and closes by promoting "flexitarian choices for our changing lifestyles". Focussing on reduced beef consumption as a target of flexitarian intervention, I situate flexitarianism in relation to calls for a "protein transition", which would address the risks the dominant beef industry poses to animal, human, and planetary wellbeing. Drawing from a larger case study on beef shopping at Loblaw supermarkets, I consider the extent to which the version of flexitarianism on display at Loblaw supermarkets might support the status quo in the dominant beef industry. As a flexible framework, flexitarianism holds potential to respond contextually to the needs of varying food networks in Canada. As a defined consumer demographic, however, flexitarianism is poised to reroute this flexibility away from diverse food systems toward adaptable investments, which would insulate financial portfolios from the risks of intensive animal agriculture without requiring meaningful changes within those industries.

Keywords: Flexitarianism; Canadian supermarkets; Canadian beef; plant-based substitutes; meat shopping; ESG; financialization

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DOI: 10.15353/cfs-rcea.v11i1.638
ISSN: 2292-3071

Résumé

Le flexitarisme a été l'une des principales tendances alimentaires de l'été 2020. Considérant la réduction de la consommation de viande comme représentative des réflexions sur la santé personnelle et sociétale qui avaient lieu à ce moment, le plus grand détaillant alimentaire du Canada, Loblaw, a situé son offre élargie de produits à base de plantes comme une réponse au « nouveau nous » qui émergeait de la pandémie de COVID-19. Cet article explore les voies protéiques que Loblaw ouvre et ferme par sa promotion de « choix flexitariens pour nos modes de vie en évolution ». En mettant l'accent sur la réduction de la consommation de bœuf comme cible de l'intervention flexitarienne, je relie le flexitarisme aux appels à une « transition protéique » qui s'attaquerait aux risques que l'industrie dominante du bœuf fait courir au bien-être des animaux, des humains et de la planète. À partir d'une étude de cas plus vaste sur l'achat de bœuf dans les supermarchés Loblaw, j'examine dans quelle mesure la version du flexitarisme exposée dans les supermarchés Loblaw pourrait favoriser le statu quo dans l'industrie dominante du bœuf. En tant que perspective flexible, le flexitarisme a le potentiel de répondre de manière contextuelle aux besoins des différents réseaux alimentaires au Canada. Cependant, en tant que groupe démographique défini de consommateurs, le flexitarisme tend à détourner cette flexibilité : celle-ci n'est pas adressée à divers systèmes alimentaires, mais concerne des investissements adaptables, qui isoleraient les portefeuilles financiers des risques de l'élevage intensif sans exiger de changements significatifs au sein de ces industries.

Introduction

Flexitarianism was one of the top food trends of the summer in 2020 according to Canada's largest food retailer, Loblaw (President's Choice [PC], 2020a).[1] Describing flexitarianism as "a style of eating" that focusses on plant-based foods and includes animal-based foods "in moderation" (PC, 2020b, para. 7), Loblaw invited "future flexitarian[s]" (PC, 2020a, subtitle) to experiment with products from its new private label line, President's Choice (PC) Plant Based. While a concentration on plants typifies the diets of a large proportion of the world's population for whom animal foods are not widely accessible, the term "flexitarianism" combines "flexible" and "vegetarian" to describe patterns of eaters primarily in the global North who have been moving away from animal foods since the late-twentieth century because of concerns about animals, health, and the environment (Flail, 2011; Oxford English Dictionary [OED], 2023). Products in the PC Plant Based line are

[1] An "Editor's note" on the PC *Insiders Project* website reads: "The opinions shared in the articles and videos featured on the INSIDERS PROJECT platform are the respective author's or host's, as applicable, as published by our content partner, and do not necessarily represent the views of Loblaws Inc. or its affiliates" (PC, n.d.). Regardless of the intentions of individual authors, the site remains a valuable resource for exploring the discourses that surround the company. Similarly, the views expressed in this article are my opinions based on evidence from my case study, and they do not necessarily represent the perspectives or intentions of Loblaw Companies Ltd.

part of a "new generation" (Zhao et al., 2022, p. 2) of plant-based substitutes that trouble the economic and ontological definitions of "meat" as a retail category by using plant-derived ingredients to mimic the texture and flavour of animal-based products (International Panel of Experts on Sustainable Food Systems [IPES-Food], 2022; Jönsson et al., 2019; Mudry & Phillips, 2022). Characterizing the flexitarian choice to reduce meat consumption as representative of personal reflections during the COVID-19 pandemic on "what's essential [and] what we could do without" (Weston, 2020, para. 3), Loblaw situated the company's expanded plant-based offerings as a response to an improving "new us" that was emerging from the crisis (PC, 2020b, para. 3).

This aspirational discourse invokes the deliberations that are taking place in academic, industry, and policy circles about a potential "protein transition" from food systems' overreliance on intensive animal agriculture to more sustainable, ethical forms of protein provisioning (IPES-Food, 2022; Katz-Rosene et al., 2023). As demonstrated by recommendations from the Food and Agriculture Organization of the United Nations (FAO) and World Health Organization (WHO), agreement is growing about the benefits for humans, other organisms, and environments that could follow from a global rebalancing of animal- and plant-based proteins (FAO & WHO, 2019). The details of such a transformation are the subject of debate, however, as concerns circulate about who stands to win and to lose in various transition scenarios (IPES-Food, 2022; Katz-Rosene et al., 2023). As powerful players in contemporary food systems, supermarkets have significant voices in shaping the ways in which these discussions are expressed in formal policies and everyday practices.

This article peruses the protein pathways that Loblaw opens and closes by promoting "flexitarian choices for our changing lifestyles" (PC, 2020b, subtitle). The exploration is part of a larger case study of shopping at Loblaw supermarkets, which examines supermarkets' roles as mediators, specifically in relation to the risks and ethics of the beef industry's infrastructures in Canada. Located at key political economic bottlenecks between ranchers and eaters (IPES-Food, 2017), supermarkets regulate not only the material flow of beef as a foodstuff but also the sociocultural norms of the environments in which beef is experienced as a cuisine. While flexitarian dietary patterns vary, they tend to include less beef than other meats (Malek & Umberger, 2021; Peschel & Grebitus, 2023), and studies indicate that flexitarians use plant-based substitutes most frequently to replace beef dishes (Good Food Institute [GFI], 2022). Flexitarianism emerges in the case study research as a noteworthy practice that Loblaw leverages to address public critiques about the ethics of beef consumption.

Focussing on reduced beef consumption as a target of flexitarian intervention, I assess the extent to which Loblaw's flavour of flexitarianism is poised to contribute to an ethical "protein transition" in Canada. First, I situate calls for a "protein transition" in relation to the risks the dominant beef industry poses to animal, human, and planetary wellbeing. After describing the methodology of the qualitative case study, I proceed by outlining the characteristics of flexitarianism that surfaced as themes in the research. I consider how the version of flexitarianism on display at Loblaw might support the status quo in the dominant beef industry. Overall, I argue that Loblaw reroutes the potential resilience that flexitarianism offers as a flexible framework that can be adapted to support diverse food systems; as a defined consumer demographic, flexitarianism instead promises to insulate financial portfolios from the risks of intensive animal agriculture without requiring meaningful changes within those industries.

Background

Loblaw (2022) has made a "commitment to environmental, social and economic sustainability in the Canadian beef industry" (p. 18) in light of beef's status as an "at-risk commodit[y]" (p. 44). Not only are the natural materials and conditions required to produce beef under stress as the climate changes, but contemporary methods of beef production also add to these pressures. In this context, flexitarianism operates as a form of risk management in that it enacts a strategy to mitigate the individual and societal consequences of excess beef consumption.

Beef and risk society

Beef-cattle production systems take a wide variety of forms, several of which are associated with benefits for ecological resilience, human nutrition, and livelihoods (IPES-Food, 2022; Qualman & National Farmers Union [NFU], 2019). As the beef industry has consolidated since the mid-twentieth century, however, an industrialized model has become the norm in Canada. In this integrated system, most cattle move from birth on pastures to feedlots where they eat grain-based feed before being shipped to slaughter in centralized meatpacking plants (MacLachlan, 2001). Concentration intensifies along the beef supply chain: Canada has over fifty thousand cow-calf operations, but less than four thousand feedlots (Canfax Research Services, 2022), and just nineteen federally inspected slaughter plants (Agriculture and Agri-Food Canada [AAFC], 2022).

Critics argue that this situation has led to power imbalances between farmers and processors. As processing infrastructure diminishes, farmers must increasingly meet terms set by large processors if they want to remain in business. In contrast, meatpackers' economies of scale benefit Canada's similarly powerful big food retailers as they provide a supply of uniform products from which to stock stores across the country (NFU, 2008). Loblaw, for instance, sources beef from Canadian meatpacking plants owned by American agribusiness company, Cargill. Two Cargill plants and a plant owned by Brazilian company, JBS, account for approximately 85 percent of Canada's beef processing capacity (Finnigan, 2021; Patrice & Lamboni, 2020). These arrangements were tested during the COVID-19 pandemic when outbreaks stalled operations at all three of the plants, such that beef availability in retail locations became sparse (Finnigan, 2021; Patrice & Lamboni, 2020).

The simultaneous enormity and fragility of Canada's beef retail system illustrates the conditions of "risk society"—theorized by Beck (1992) and Giddens (1990) as the contemporary period of modernity wherein societies organize activities according to predictions about how large-scale consequences of modernity might evolve. Eating has always been accompanied by a degree of uncertainty given humans' biological history as opportunistic omnivores (Levenstein, 2012); however, the ability of food system authorities to provide veneers of certainty is collapsing in a novel way in global risk society, as the modern institutions that promised to provide order have become sources of disorder instead (Beck, 2009). Whereas big meatpackers declared that centralized processing would lead to heightened food safety in the mid-twentieth century, the scale of subsequent consolidation in the industry has introduced new, increasingly uncontainable risks as the bodies of

hundreds of cattle are ground together and shipped all over the world (Specht, 2019).

To begin, the system poses intersecting threats to human and nonhuman health. Cattle are exposed to physically and psychologically stressful experiences as they are separated from herds and transported through supply chains (Weis, 2013). The contained environments in which animals are reared also provide ideal conditions for creating virulent microbes, which can spread through global networks of trade and travel (Canadian Integrated Program for Antimicrobial Resistance Surveillance [CIPARS], 2007; United Nations Environment Programme [UNEP], 2016). Furthermore, illnesses are becoming more difficult to treat as antimicrobial resistance intensifies, due in part to the routine use of antibiotics for livestock (UNEP, 2016). Aside from the dangers of contamination, high levels of beef consumption have been associated with increased risks of noncommunicable diseases, such as cardiovascular problems and cancers (Bouvard et al., 2015; Willett et al., 2019). To put beef into circulation, human workers face physical, mental, and economic challenges including high rates of debt on farms, hazardous working conditions in slaughterhouses, and unstable employment in fast food and retail (Black, 2022; Food Processing Skills Canada [FPSC], 2019; Qualman & NFU, 2019).

Throughout the system, the most marginalized members of society pay the highest prices for beef's externalized costs. Whereas supermarkets with fresh, organic foods are located disproportionately in the affluent neighbourhoods of urban centres and suburbia (Yang et al., 2020), for instance, industrial production and processing facilities have set up shop in rural areas where they often employ low-income, racialized workforces. Although these institutions promise to bring jobs to struggling rural economies, they tend to bring pollution as well (Struthers Montford, 2020).

The environmentally strained landscapes that surround industrial animal production operations are just the tip of the iceberg in terms of the industry's ecological effects. Not only are large amounts of land and water used for raising cattle and growing feed, but these practices also degrade landscapes and waterscapes through heavy use of chemical inputs and ineffective disposal of waste (Qualman & NFU, 2019; Weis, 2013). Moreover, cattle-related industries "are the largest source of Canadian agricultural GHG emissions" (Qualman & NFU, 2022, p. 6). Justifiably or not, beef is therefore gaining a reputation as an irresponsible food choice that threatens the planet and its organisms (Charlebois, 2016).

Protein and just transitions

In response to these risks, calls for a "protein transition" have taken shape. Recognizing that current intensities of meat consumption in the global North are unsustainable (especially if expanded to a global scale), the proposals offer divergent recommendations on how best to move away from these practices (IPES-Food, 2022). Some scenarios position new technologies as a bastion of sustainability whether innovations take place within the animal-protein (e.g., sustainable intensification) or plant- and alternative-protein sectors[2] (e.g., cellular agriculture). Other visions find hope in the reclamation of local, regenerative agricultural practices that incorporate animals and plants as mutually nourishing parts of a holistic system (e.g., agroecology) (Katz-Rosene et al., 2023). Nevertheless, the perspectives converge in suggesting

[2] In addition to plant-based meat analogues, lab-grown animal foods and insects are also regularly included under the "alternative" protein umbrella (IPES-Food, 2022).

that the transition could be supported by a shift in the dietary norms of the global North to include more plant-based proteins in place of animal-based proteins. Various studies claim that a movement toward plant-focussed diets could improve nutrition, reduce zoonotic disease outbreaks, minimize animal suffering, and mitigate environmental strain (Parodi et al., 2018; Ranganathan et al., 2016; Smetana et al., 2015).

Flexitarianism is cited specifically as a consumption practice that might carry forward the "protein transition" in Canada (Ernst & Young LLP [EY] & Protein Industries Canada [PIC], 2023), as it is more accessible and attractive than other forms of meat restriction (Dakin et al., 2021). While the vegetarian and vegan percentage of the population in Canada holds steady, eaters indicate growing interest in reducing their consumption of meat, particularly beef (Charlebois et al., 2018; Doucette, 2019). Catering to this emergent group, new and increasingly meaty plant-based substitutes, like PC Plant Based, are highlighted as significant "transition" foods (Canadian Press, 2018) that can ease dietary adjustments for eaters accustomed to meats.

More than a vehicle to deliver the end goal of a global dietary shift, flexitarianism has potential to encourage equity within the local transition processes that make up these larger changes. First used by American trade unions to navigate new environmental regulations in the late-twentieth century, the idea of a "just transition" argues that economic transformations must be enacted in ways that support workers as well as environments. Since then, the scope has broadened beyond considerations of livelihoods to take into account a range of potential repercussions on humans, other organisms, and ecologies during socioeconomic shifts. "Just transitions" make sure that costs and benefits are equitably distributed, so that groups marginalized by existing systems do not bear the weight of structural reforms. The concept has gained traction over the past decade in relation to plans to transition the energy sector from fossil fuels to renewable sources (Blattner, 2019; Ruder et al., 2022; Verkuijl et al., 2022).

More recently, attention has turned to agriculture—particularly animal agriculture—as another industry to which the "just transition" approach could be applied to manage equitably the risks involved in necessary transformations. While a "protein transition" could bring overall improvements to the health of humans, animals, and ecologies, for example, it could also cause harm to farmers, rural communities, food insecure people, and other vulnerable groups if it is not implemented carefully. In addition to assessing the equity of potential outcomes then, the "just transition" framework advocates for inclusive governance that incorporates the meaningful participation of all affected parties throughout transition processes. Accordingly, "just transitions" manifest differently depending on the environments in which they are taking place, even if they may share common values and a recognition of their entanglements in larger systems (Blattner, 2019; Ruder et al., 2022; Verkuijl et al., 2022).

Flexitarianism could be part of ensuring that the "protein transition" is also a "just transition", as it is a heterogenous, non-prescriptive practice that can respond to individual needs and local contexts while acknowledging the limitations of the planet's food systems (Dagevos, 2021). A variety of flexitarian enactments could also add strength to food systems overall as they could draw on a diversity of food sources rather than overtaxing singular pathways from land to table. Reviewing the literature on protein and food systems transitions, Katz-Rosene et al. (2023) find promise in approaches that pursue multiple versions of sustainable protein, even as they heed the notes of

caution that have been raised about the potential for transitions to be stalled by disagreements: "Our assessment is hopeful that in reflecting the heterogenous nature of protein foods and the protein subsystem itself, protein pluralism may serve as a resilient response to the wicked problem of unsustainable protein. The challenge is to find a way for diverse pathways in food sustainability to overcome ideological determinism, policy incoherence, and collaborate on shared objectives" (p. 13).
Might flexitarianism offer an appropriate response to this tension? Like the supple strength of a tree bending in the wind, is the inherent flexibility of flexitarianism adaptable enough to accommodate diverse perspectives without breaking its foundations?

Observing that flexitarianism does not have a singular definition, studies have investigated the range of motivations and behaviours that make up the tendency toward meat reduction that has become a notable pattern in high-income countries (Dagevos, 2021). In Canada, Lacroix and Gifford (2019) determine that "meat-reducers" are motivated by a combination of personal benefits (e.g., health) and social responsibilities (e.g., environment) to eat vegetarian meals at least once per week. While only 10 percent of respondents self-identify as flexitarian in Charlebois, et al.'s (2018) survey of consumers in Canada, the study shows that more than 50 percent of respondents are "willing to reduce…meat consumption over the next 6 months" (p. 13). Sijtsema et al. (2021) argue that "characteristics of the social and physical environment" (p. 14) should be studied alongside individual motivations to understand flexitarian activities, given that external factors can promote and/or hinder the expression of stated intentions.

Further to this emphasis on context, I turn attention to supermarkets as mediating environments that shape and are shaped by flexitarianism and the "protein transition" it may prefigure. In doing so, I notice a presupposition in the literature on flexitarianism that positions flexitarians as consumers, even as studies add nuance to describe the various ways in which consumption habits are expressed. Exploring this discursive construction's materialization in shopping practice, I consider how the identity of the flexitarian as a consumer might limit the responsiveness—or flexibility—that flexitarianism exhibits in relation to shifting socioecological needs. While "hopping onto the flexitarian trend couldn't be easier for [the] summer" (PC, 2020a, para. 2), sustaining flexitarianism's disruptive potential is a harder, but more essential, practice for the long-term future.

Methods

This article presents a selection of findings on flexitarianism from a larger research project on food retailers' roles in addressing the risks of beef consumption in Canada, which takes the form of a case study of beef shopping at Loblaw supermarkets. Food retailers are situated at vital junctures in food systems. In Canada, three supermarket companies take in approximately 70 percent of the industry's revenue; as the largest of these companies, Loblaw alone holds over 30 percent of the market share (McGrath, 2022).[3] Loblaw was thus selected as a site for the case study, as it represents a common space where people encounter

[3] This calculation excludes supercentres, warehouse clubs, and convenience stores (McGrath, 2022).

beef. While meatpackers and other concentrated industries also represent powerful nodes at the centre of food networks (IPES-Food, 2017), retailers display unique qualities amongst these players, as they are public-facing institutions that connect everyday people with the specialized expertise involved in running global supply chains (Giddens, 1990). As such, they have ready access to both the material resources of suppliers and the discursive resources of public opinion, which can be used in combination to shape food system norms. In investigating how risk arises in food systems, I study both the contents and the formal qualities of supermarkets. As mediators, supermarkets hold notable power to (re)distribute the risks of beef consumption by (re)organizing food system relations around themselves.

The case study was exploratory in nature. Rather than gathering data for the purpose of establishing a representative example that could be replicated elsewhere, it sought to create a conversation that might inspire further improvisations on the research (Viveiros de Castro, 2019). Following from the approaches of situated intersectionality (Yuval-Davis, 2015), I constructed the study with a combination of qualitative methods that offered (partial) access to the placed perspectives of various actors involved in the practice of beef consumption in Canada. My empirical research involved: visits to private and public archives and company websites to view promotional magazines, articles, flyers, and advertisements; observations at thirty-six supermarkets in Toronto; expert interviews with two company executives and five store managers; and four focus groups with supermarket shoppers. Pseudonyms are used for focus group participants and interview respondents. The study was approved by the Office of Research Ethics at York University.

My approach to analyzing the data was informed by critical discourse analysis, which reads texts as discursive events that simultaneously inform and are informed by their contexts (Willig, 2013; Wodak, 2004). I adopted this analytic attitude to examine textual materials, including promotional resources, labels, signage, and transcribed exchanges with workers and shoppers. As the framework does not limit "texts" to written words and verbal utterances, I also analyzed the images, sensations, and architectural spaces that I encountered, including archival photographs, drawings, and audio recordings, as well as notes and sketches about the sensory information that I gathered in the field (Banks, 2007; Rose, 2001). On the whole, the analysis examined how actors involved in beef consumption relate to one another via Loblaw as a medium.

This article specifically draws on the case study's investigations of how Loblaw uses environmental, social, governance (ESG) initiatives to manage concerns about the risks associated with beef. A variation on corporate social responsibility (CSR) that has become increasingly common since the late 2000s, ESG is an investment-focussed framework that assesses a company's performance not only in terms of financial metrics, but also in relation to environmental, social, and governance issues (Knoepfel & Hagart, 2009). Flexitarianism appears in the case study data as an opportunity for Loblaw to align its sales of beef with its ESG goals despite criticisms of the beef industry. Presenting thematic qualities of flexitarianism from the case study, the next section of the article discusses how flexitarianism is being shaped as a consumer demographic at Loblaw's stores.

Results and discussion

Loblaw has been tracking vegetarian products as an emerging trend for years. The company's promotional magazine, *Insider's Report,* named tofu "the food of the future" (PC, 1984a, p. 12) in the 1980s and "food for the new millennium" (PC, 1999, p. 6) in the 1990s. It presented "wholesome and delicious" vegetarian patties and sausages as indicative of "a state of mind beyond meat" (PC, 1998, p. 8) well before the Beyond Meat brand name became a catchall moniker for plant-based substitutes. Loblaw's recent promotion of the PC Plant Based line and other plant-based products builds on this history in dialogue with contemporary trends. In the ESG era, the wholesomeness of plant-based foods has gained meaning beyond individual nutrition to reference plant-based products' well-rounded contributions to environmental, social, and economic sustainability. With the launch of the PC Blue Menu flexitarian burger in 2020, Loblaw gave shoppers the opportunity to enjoy the "Best of both burgers" (PC, 2020c, 0:04) by combining beef and vegetables into a single patty. Allowing shoppers to have their beef and eat it, too, this burger "hack" is representative of how flexitarianism appears at Loblaw.

Optional flexitarianism and consumer choice

Flexitarianism is optional at Loblaw's stores. As opposed to invoking meat reduction as a sacrifice, Loblaw presents flexitarianism as an expansion of options to "suit any palate" (PC, 2020b, para. 13). During my store observations, I visited an interactive display that was part of Loblaw's (2017) "Taste the New Next" campaign on emerging food trends. It invited shoppers to "Tap into the ongoing revolution in protein possibilities and take your palate beyond traditional options" by "Swing[ing] by for a sample" of "Alternative proteins you didn't know you you'd love." The setup included bowls and decorative jars filled with protein-packed legumes, grains, and insects. Referencing this diversity of proteins as well as the importance of food waste reduction, a chalkboard-style sign read: "Eat it all".

The inclusivity of flexitarianism allows Loblaw to gain favour with the largest possible array of eaters. Having observed the plant-focussed market since the first explicitly labelled vegetarian products were introduced to the PC lineup in the 1990s, retired Loblaw executive, Adrian predicts future changes during our interview: "There will always be the hardcore vegetarian…like three to five percent of the market…[which is] an important piece of the equation. But I think actually a bigger piece of the equation is the omnivore…a large percentage of the everyday consumer who just is eating less meat. And that will make up ten times what the vegetarian piece is. And if you can offer that consumer who wants to eat less meat good vegetarian options, then you're really hitting the ball out of the park."

Flexitarianism is not an all-or-nothing proposition. In comparison to vegetarianism and veganism, flexitarianism appears to be easier to maintain (Dakin et al., 2021) and less steeped in negative connotations (Flail, 2011). Echoing Adrian's words, Loblaw assures potential flexitarians: "this food philosophy embraces flexibility. In other words, no one's going to mistake you for a hardcore vegan" (PC, 2020a, para. 2).

Meats are not excluded from the flexitarian cornucopia. The PC flexitarian burger allows eaters to combine meat and vegetable intake and to choose between different meats. In an article on the PC *Insiders Project* website, product developer, James Cranston explains: "For those who prefer poultry to

beef, we are also launching a chicken flexitarian burger featuring the same vegetables as the beef burger. It's all in the spirit of providing more choice" (PC, 2020d, para. 23).

This flexitarian diversity aligns with the contemporary celebration of consumer choice as both a fundamental freedom and a central mechanism to create an ethical society. Observing a societal identity shift from citizens to consumers since the late-twentieth century, scholars argue that the public has been encouraged to articulate political interests predominantly through the marketplace (Bauman, 2007; Cohen, 2003). This pattern corresponds with the rise of neoliberalism as a dominant political economic formation, which proposes that social prosperity is best advanced by the innovation that emerges from a competitive, deregulated market (Harvey, 2005). Neoliberalism has been accompanied by the increasing financialization of industries including food and agriculture wherein the buying and selling of financial instruments has become a primary method to accrue capital (Clapp & Isakson, 2018). In this context, I include "the *investor*" (Martin et al., 2008, p. 123) as an additional identity that the neoliberal "citizen-consumer hybrid" (Johnston, 2008, p. 229) expresses, and I suggest that practices of shopping are increasingly organized according to the paradigms of responsible investing. In other words, people are urged to use the goods and services they buy not only to construct their contemporary identities and to "vote with their dollars" for the food practices they support (Johnston, 2008), but also to invest in themselves for the future and to gain security in the face of coming risks.

Positioning the company's involvement in plant-based foods as a response to shoppers' interest, former Loblaw President, Galen Weston (2020) writes: "Th[e] movement toward flexitarianism…is growing. People are curious about the benefits; they want more information and options" (para. 4). Based on purchasing signals from citizen-consumer-investors, the market is meant to enable the best business practices to rise to the top. In contrast to the overt regulations of the liberal welfare state, industry leaders like Loblaw do not limit the choices of shoppers through prescriptive guidelines. Instead, they make information available about products and/as potential investment options, so that shoppers as citizen-consumer-investors can make decisions of their own accord. Taking onus off industry actors, shoppers have a duty to weigh these options to determine for themselves the parameters of responsible beef consumption in relation to both the immediate and long-term implications of their choices.

Versatile flexitarianism and industry consolidation

Flexitarianism is also versatile at Loblaw's stores. PC Plant Based products are conveniently interchangeable with the animal products they imitate. Catering to the comfort zone of the mainstream omnivore, Loblaw recommends that shoppers intimidated by the switch to plant-based eating "try having a meatless day once a week" (PC, 2020b, para. 9). The company promises: "many plant-based foods are easy to find and there are a growing number of choices and mouth-watering recipes to choose from" (PC, 2020b, para. 11). Even as Loblaw's products increase in numbers, flexitarian foods simultaneously become more homogenous, as animal-derived foods remain the assumed norm against which "alternative" protein options are positioned. The "5 satisfying ways to eat more plant-based foods" (Sibonney, 2020, title) listed in an article on the PC *Insiders Project* website all involve replacing animal products with PC Plant Based substitutes. From PC Plant Based Beefless Broth to PC Plant Based Coconut

Milk Frozen Dessert, the design of plant-based products consistently references animal-based foods.

Although a recent addition to the PC veggie burger lineup is vegetable forward and does not imitate the taste of meat, it is still presented in the *Insider's Report* as a product that "even meat eaters will love" (PC, 2022, p. 13). Positioning meat as the measuring stick of product quality and meat eaters as the ultimate arbiters of taste, the PC Plant Based Chickpea and Sweet Potato Veggie Burger joins the ranks of analogues that have been part of the PC family since the 1990s. An archival radio script for a commercial promoting the PC World's Best Meatless Burger in 2000 reads:

> Anncr: "When President's Choice product developer Maddalena Molino came up with the World's Best Meatless Burger she knew she had a product that most people would love. But the real test was having the meat guys taste it. The results were far better than she could have ever imagined. ...
> Meat Guy: (with a mouthful of food) NO meat, huh? (Impressive) Hmmm.
> Anncr: The meat guys aren't much for conversation" (Bensimon Byrne D'Arcy & Goudie, 2000, para. 1).

The contemporary flexitarian "veggie burger revolution" (PC, 2022, p. 13) is executed so smoothly that changes in dietary and shopping practices are barely perceptible. Breaking out of segregated health food departments, the new plant-based substitutes are "often [located] in the same aisle as their dairy and meat originals" (PC, 2020b, para. 15). While PC Plant Based products provide clear labelling for the motivated flexitarian, the familiar form of the products also appeals to the reluctant flexitarian (Biltekoff & Guthman, 2022). A humorous advertising campaign for PC Plant Based products parodies the conventions of horror films to demonstrate to hesitant eaters that they have "Nothing to Fear"; formerly skeptical diners are shown chowing down on the plant-based foods that family members have served them (Powell, 2020).

Rather than disrupting eating habits, the plant-based "revolution" thus maintains a "centre of the plate" (IPES-Food, 2022, p. 48) approach to protein. When flexitarian reimaginings are restricted to variations on the Western culinary format of meat, potato, and side, protein retains valuable real estate as a dining focal point. In other words, meals are still organized around a central protein even if a beef burger is swapped out for a veggie burger. Howard et al. (2021) observe a pattern of "'protein' industry convergence" (p. 1) that sees large meat and dairy companies gaining an increasingly powerful hold over opportunities in the alternative protein space by "investing in or developing plant-based substitutes" (p. 1). Loblaw's beef supplier, Cargill launched a plant-based protein consumer brand in China called PlantEver (Cargill, 2020b), and added pea protein to its selection of plant-based ingredients that are available to food retail and service operations for use in control brands (Cargill, 2020a,c,d).

Product options may be expanding in response to flexitarianism, but product ownership is narrowing as industry and investors consolidate holdings. Even as shoppers substitute plant-based options for beef, capital is increasingly funneled toward the same narrow set of actors regardless of purchasing patterns. As Cargill's Chief Operating Officer, Brian Sikes summarizes in a press release: "Whether you are eating alternative or animal protein, Cargill will be at the center of the plate" (Cargill, 2020a, para. 10).

Nutritious flexitarianism and de-animalized protein

Finally, flexitarianism is nutritious at Loblaw's stores. Focus group participants, Victoria, John, and Rosa discuss the elements that may be missing from a vegetarian diet:

> Victoria: "Maybe the iron and protein.
> John: Yeah.
> Victoria: To be vegetarian, you have to be really careful that you're getting those things to equal enough of it.
> Rosa: Yeah, the B12."

With flexitarianism, nutrients can be mixed and matched. Every PC flexitarian burger contains "a quarter cup of vegetables…16 grams of protein and three grams of fibre" (PC, 2020d, para. 6).

These nutrient breakdowns are reflective of "nutritionism"—a dominant perspective on nutrition that measures the health of foods according to biological components without considering the broader contexts of food environments (Scrinis, 2008). In seeking to replicate meats, companies often fall back on such discourses to demonstrate the meat-like authenticity and nutritional legitimacy of their products (Broad, 2020). As such, meat producers can piggyback on the nutritionist justification of plant-based foods to rehabilitate the perception animal-based foods. The values attached to protein are a notable component of this process, as actors like Cargill rebrand themselves as "protein" companies, which are, in the words of Cargill representative, Jackson Chan: "taking an inclusive approach to the future of protein by investing in both animal and alternative protein" (Cargill, 2020c, para. 4). Unlike other macronutrients (i.e., carbohydrates, fats), protein has retained a reputation as a healthy, essential part of the human diet. When meats are redefined as "proteins", they can be positioned alongside plant-based products as solutions (rather than contributors) to food insecurity (Guthman et al., 2022). Signs above meat display fridges in Loblaws remind shoppers that beef is a "good protein" and an "excellent source of iron, zinc and vitamin B12".

As meats are reconceptualized as "substrate[s] carrying information" (Muhlhauser et al., 2021, p. 2), which can be broken down and refabricated as plant-based substitutes, they become further distinguished from the bodies of animals. PC Plant Based products thus extend the PC tradition of differentiating protein foods from evident traces of animality. A pitch for Jack Kwinter's hot dogs in the *Insider's Report* reads: "Kwinter's dogs are made with skeletal beef; you won't find any cheeks, tripe, hearts or tongue trimmings as permitted in the manufacture of ordinary hot dogs" (PC, 1984b, p. 12). A decade later, the report introduces PC vegetarian frankfurters, emphasizing: "You'll love our new meatless hotdogs because of what they *aren't*—they aren't made from meat byproducts" (PC, 1992, p. 13). Certified vegan by third-party, VegeCert, PC Plant Based products are similarly desirable because they "contain no animal by-products" (Loblaw, 2022, p. 18).

Regardless of the actual origins of the ingredients, the de-animalized form is appropriate for the creation of self-contained commodities that can be shipped through supply chains on a "just-in-time" basis—an arrangement that continues to advantage partnerships between large packers and retailers like Cargill and Loblaw. In comparison with smaller operators, large meatpackers face fewer barriers in transporting products to profitable markets, and they can thus extract economic value from every part of the cattle they process. The infrastructure for commercial use of animal byproducts (e.g., rendering plants, tanneries) has

been disappearing in Canada since the late-twentieth century, as meatpacking plants have consolidated in ownership and geography. Whereas large-scale packers have moved much processing work on-site through "boxed beef" arrangements (Bisplinghoff, 2006), small-scale packers have continued to rely on diminishing local options for byproduct processing. Because food safety regulations prohibit the movement of non-federally inspected animal products across national and provincial borders, regional abattoirs have a limited market even for the sale of cuts from dressed carcasses (Brynne, 2020; Rude, 2020). In contrast, multinational companies like Cargill have opportunities to export their products to countries where the markets for byproducts are more lucrative and demand for skeletal meat is growing (Hicks et al., 2018; Luckmann, 2021; National Beef Strategic Planning Group [NBSPG], 2022).

Implications

Crafting a flexitarian practice that is optional, versatile, and nutritious, Loblaw participates in sculpting the seemingly indefinable boundaries of a diet premised on flexibility into a niche market that fits comfortably within existing food system logics. An article on the *Insiders Project* website explains the rationale behind the introduction of the PC flexitarian burger: "The company already had a robust line of frozen burgers on offer, from all-beef to fully vegetarian, but they wanted to create a product for those who are more conscious about the amount of meat they're eating right now" (PC, 2020d, para. 5). Like the beef, flexitarian, and veggie burgers that sit side by side on Loblaw shelves, flexitarianism exists at Loblaw between vegetarianism and omnivorism as another dietary choice. From this parallel position, it does not pose a significant structural challenge to Loblaw's partnership with the beef industry.

Instead, this curated flexitarianism bolsters an investment opportunity that has been opened by public critique of the dominant beef industry. The discourses, plans, and activities that have precipitated the potential "protein transition" have been accompanied by speculation about the "possibilities for profit making [that] are lying idle for investors" as the food system changes (Sippel & Dolinga, 2022, p. 8). Holding $66 trillion in assets under management (AUM), for instance, the Farm Animal Investment Risk and Return (FAIRR) Initiative aims: "to build a global network of investors who are aware of the issues linked to intensive animal production and seek to minimise the risks within the broader food system" (FAIRR, 2023, para. 2). Beside nine risk factors for animal protein companies, FAIRR (2020b) lists "sustainable proteins" as a key opportunity factor, suggesting: "investors and retailers alike" can build "competitive advantage" and "future-proof their infrastructure and investments" (p. 5) by diversifying into the plant-based space. Echoing FAIRR (2020a), investment advisors in Canada identify the flexitarian consumer segment as "the largest area for growth in the [plant-based] market" (Natural Products Canada [NPC] et al., 2022, p. 4).

Because this kind of ESG investing purports to manage risk, it is often fallaciously conflated with the prevention of disasters related to areas of ESG concern, like the threats to ecologies, human health, and animal

welfare that surround the dominant beef industry. In reality, ESG investing is mostly focussed on handling financial portfolios so that they are resilient to such catastrophes (Fancy, 2021). Launching an "Alternative Protein Fund", venture capital firm, AgFunder outlines the intended beneficiaries of the risk management strategies of ESG investing in the plant-based market: "We believe the challenges and risks of conventional animal agriculture provide a significant opportunity for startups that are developing new strategies to supply alternative protein products, as well as for investors looking to hedge or diversify their exposure to the meat industry" (Dorone, 2019, p. 7). Similarly, Natural Products Canada (NPC) describes its $50 million investment fund, NPC Ventures as an effort "to help develop and de-risk promising Canadian opportunities" in the alternative protein sector (NPC et al., 2022, p. 42).

In Canada, plant-based and other "alternative" proteins have been proposed as a potential basis for the conversion to a new agricultural system that would support Canada's anticipated green economy (PIC, 2022b). Representative of this direction, Protein Industries Canada (PIC) (2022b) is a multistakeholder undertaking that was created out of the federal government's Innovation Superclusters Initiative (now Global Innovation Clusters)—a program of collaborations between businesses, academic institutions, and non-governmental organizations funded by industry and government to "boost innovation and growth in a particular industry" (Innovation, Science and Economic Development Canada [ISED], 2023, para. 1). With a vision to position "Canada [as] a global leader in plant protein" (p. 3), PIC (2022b) has launched a plan to enable Canada "to supply…10 per cent of the ingredients for the global plant-based food market" by 2035 (p. 8). Loblaw is a participant in PIC's research project on regulatory modernization, which aims to harmonize Canada's regulatory environment with innovations in the plant-based market (PIC, 2022a).

As long as flexitarianism takes an apolitical form, Loblaw can leverage the adaptability of the diet to marry shopping choices with the current financial interests of the company. Discussions on "de-risking" the plant-based industry appear to refer not to efforts to address the systemic risks of meat, but rather to endeavours to cultivate lucrative investment spaces that will yield reliable returns for priority investors. Aligning with the project in which Loblaw is involved, a key recommendation that informs PIC's work is: "Reduce regulatory red tape" (EY & PIC, 2023, p. 8). This pattern is in keeping with the wider neoliberal erosion of the social safety net, which has shifted security and risk management from a public to a private responsibility (Hacker, 2019). As actors gather around attractive market opportunities, the security that plant-based substitutes offer for future food systems increasingly takes the form of "securities" in the sense of financial instruments.

Conclusion

Whereas flexitarianism could be adapted to agroecological niches to nourish relationships between eaters and ecologies, it is instead being adapted to market niches to solidify value chains between meatpackers and retailers. Currently, the "new us" whose post-pandemic coalescence Loblaw had forecasted is looking remarkably similar to the old groupings of "us" versus "them" that had previously

represented the risk distributions of the financialized food system. Privileged actors like large food processors, big retailers, and financial firms that can afford to invest in the opportunities of the plant-based market are gaining security, while others like small-scale growers, low-income communities, and nonhuman animals are left further behind as the risks of the beef-cattle system multiply.

Acknowledgements: I am grateful to the focus group participants and industry professionals who shared their time and expertise with me as contributors to my study. I also appreciate the generous, insightful feedback on the article that I received from two anonymous reviewers and an editor of this journal.

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