

TUCO Scottish Regional Meeting

Thursday 24th February 2022 at 2:00 pm via MS Teams

MINUTES

Attendees:	Ian Macaulay [Chair]	Edinburgh
	Mike Belton	Calmac Ferries
	Iain Calder	Forth Valley College
	Gareth Davies	Forth Valley College
	Diarmuid Griffin	City of Glasgow College
	Judith Hoyle [Sec]	TUCO
	Elaine Hutton	Ayrshire College
	Steven McKay	St Andrews
	Stuart McMaster	Calmac Ferries
	Nicola Mellor	TUCO Contracting
	Alan Riddell	St Andrews
	Laura Shaw	Strathclyde
	Jemma Wylie	Strathclyde
Apologies:	Andy Anderson	APUC
	Thomas Day	Heriot Watt
	Jennifer Dick	Dundee and Angus
	Mark Donovan	Aberdeen
	Matthew Gilmour	UWS
	Fiona Hughes	Strathclyde
	Louise Levens	APUC
	Calum MacLachlan	Aberdeen
	Sarah McLoughlin	TUCO Academy
	Mark Nixon	St Andrews
	Graham Paterson	Strathclyde
	Jane Speirs	Ayrshire College
	Ester Vasallo	Forth Valley College

1. Apologies for Absence

Apologies as listed above.

2. Presentation by Ricky Reyes and John O'Brien from Blue Arrow

A copy of this presentation is attached to the Minutes.

3. Member Updates

Ian explained that he would like to see what TUCO is doing with regard to how we communicate ourselves within the wider sector.

Nicola thought that Mike and Matthew White may be working on something but was not sure to raise the profile of the sector with a view to attracting new recruitment. Ian has also suggested at a recent Regional Chairs meeting when recruitment challenges were discussed. Alan was not aware of this project but will raise it at the next Board Meeting on 17th March.

Action: Alan

It was generally felt that things have moved on with regard to COVID-19. Reference isolation support Edinburgh have stopped providing students in self-catered accommodation with grocery boxes but are still providing to students in catered halls who have meals included in their package. At this time Scotland still has the last remaining divergent approach to isolation in the UK where any person with a close or household contact and has not received all 3 jabs must isolate for 10 days even if they are not positive.

4. TUCO Framework Updates (Nicola)

Two new members of the Category Team are now on board – Natalie Phillips and Li Davies – so framework responsibility has changed

Milk and Bread

This went live on 24th January with 3 suppliers – BAKO NW, Coultons and Freshways no longer on there.

Meat and Poultry

This is being managed by new Category Manager Natalie Phillips and launched on 1st January under regional lots.

Design and Installation for the Customer Experience

This is at the Research stage and should be advertised as a new framework in March. There will be a gap between the current expiry date and the new one starting.

Sandwiches

This is in the process of being re-tendered.

Fresh Fish and Seafood

At this strategy stage and will be re-tendered this year.

Fruit and Veg

Being re-tendered this year.

Soft Drinks

This has been extended to December 2022 then will be re-tendered

EPOS

This has 3 new suppliers on there – UniWare, Zonal and Blink.

CICS

This has 2 new suppliers on the framework – Theo's and Change Please. The next round of SQs closes mid-May. Hannah is also working with Pret and Costa.

Nicola asked members who are looking to put any of the above on-site, would you do this as managed or franchised? Ian replied that you would need to go to another third party to get a franchise. Nicola commented that TUCO are looking to do a deal on this.

Ian is not aware of any appetite for the full brand. At Birmingham they have just rented space out to companies such as Pret etc.

Steven added that the reason a lot of universities still self-deliver is a hesitation to go down the big brand route. He believes that a lot depends on the individual institution.

Contract Review Meetings have been held for Soft Drinks, Vending, Catering Light and Heavy Equipment and Alcohol.

Price Changes

These are all in the pricing Newsletter. DipChem increases came in in December although Bunzl and Diversity have deferred theirs for the time being, with Soft Drinks in October however Coke have not brought theirs in yet. On Grocery, Frozen and Chilled, most of the suppliers have introduced high increases between 2 and 4.6%. Further increases are expected of around 6%. Hot Beverage price increases came into effect on 1st January or with Scottish suppliers, from 1st February. It is mainly beans which are affected but also syrups and teas with increases of up to 21% having been seen.

On the alcohol framework there are wine shortages on such things as Sauvignon Blanc with average price increases of between 4 and 6.5% on Sauvignon Blanc, Pinot Grigio, Burgundy and Chablis effective from March/April depending on when we get them from suppliers. Fresh Fish prices will also change in March.

On Catering Light and Heavy the cost of raw materials has increased for such products as stainless steel (39%) and aluminium (51%). Churchill prices are around 2.5 times higher than in 2019.

Bidfood are due to introduce new pricing in March which is expected to be high. Steven remarked that today has seen a 20% increase in crude oil.

APUC have recently refused a high increase on their Meat tender with the likes of Campbell Bros. Members felt that reassurance is needed from TUCO that they will stand firm on attempted huge price increases.

On Sustainability, Nicola asked if any members were calculating the CO₂ emissions of their kitchen including the opening and closing of doors. St Andrews has quite robust carbon targets and have CO₂ monitors in all their rooms. This seems to mostly fall under the remit of Estates Departments.

Ian referred to the February magazine introduction by Chair Phil Rees-Jones in which he stated "We are a member organization, please do not hesitate to reach out". As the price increases are very aggressive at the moment he urged members to use the opportunity to engage with TUCO. Please reach out and speak to Category Managers within both APUC and TUCO.

Commodity Representatives

The representative from Edinburgh on the Sandwiches TWP will not be travelling to Bristol for the sampling. Ian requested a list of representatives from Scotland so that he could update the categories.

Action: Nicola

Iain asked if any members had changed their selling prices as a result of recent increases. Ian referred to the recent TUCO Benchmarking Report on the website. Edinburgh have not put up any of their prices. Diarmuid has not increased any of his at City of Glasgow. CalMac have not brought in any increases, they have been doing some menu re-development to evaluate what those increases are doing to their bottom line

5. APUC Report

A copy of the video presentation is included with these Minutes.

6. TUCO Academy Update

We had reached 800 qualifications gained by the end of December 2021. Sarah has delivered 7 or 8 courses over the last couple of weeks, the majority of which are compliance and have been held online.

Recent courses have included Leadership, Food Safety, Allergens and Change Management. We are holding two Study Tours for Vegan and Vegetarian offerings – Newcastle on 15th and 16th March and London on 30th and 31st March with support from both LWC and Vegetarian Express. This is at a heavily subsidized cost to members of £99.

Regarding the new Calorie Labelling regulations coming into effect, a webinar has been held by the Academy on Thursday 24th February

Graduations for the first cohort of the Masters Degree took place on Saturday 15th January at LSBU. There are places available for the next cohort to commence in January 2023. We are establishing a working party for Menus of Change and one of the things they will be looking at is content to upload to the TUCO website.

The Winter Conference took place on 9th December at the University of Nottingham and we were only down around 8 – 10% on numbers from 2019.

A benchmarking study has been sent out to members. The deadline has now passed for completion of the Labour Survey. Results are expected to be published last week of February.

A joint Conference and Competitions event is planned at Keele University from the 25th to 27th July, although the Competitions side is looking less likely to go ahead due to staff shortages across the sector.

A study tour is being planned to the Menus of Change Leadership Summit to be held in New York from 13th to 18th June.

7. Sustainability

Steven asked Nicola about provenance and carbon reporting as it will shortly become a legal requirement to report this but suppliers do not have the a legal requirement to supply this information. **Ian will share a saffron mock-up visual with the group.**

Action: Ian



The University Caterers Organisation

Information required on the product is:

- Where it came from
- How it got here
- Social Value

Phase 1 would be standard ingredients (ie banana) then Phase 2 will be compound ingredients, which is the Scope 3 stuff.

TUCO are currently busy dealing with the plastics tax.

8. Board Update

TUCO currently has 176 full members with new Associate members coming on board from bodies such as the LEAs and NHS. We have a new procurement partnership with LACA and the first client from this was BAM FM who have to date spent £300K on our frameworks. TUCO accounts have proved better than expected with an Actual loss of £48K against a budgeted loss of £500K. This had also been helped by such things as the Job Retention scheme, 4.5 month rent holiday and a rates reduction.

Phased return of face-to-face meetings had also been discussed by the Board as member engagement statistics are very high.

Iain asked whether the calorific labelling legislation only applies in England or whether it will be introduced in Scotland as well. Natasha's Law will also be brought into effect in Scotland

9. Any Other Business

As there was no further business the meeting was duly closed.

10. Date for Next Meeting

It is hoped to hold our next meeting in person some time in May. Date and venue to be confirmed.

Introductions



Ricky Reyes
Public Sector Manager



John O'Brien
Corporate Sales Director



Siobhan Reilly
Associate Director



Experience in the market

UK

1959

Blue Arrow Established

355

Blue Arrow Employees

£285m

Annual Turnover

24,000+

Flexible Employees

24hr

Resourcing Centre

50+

UK Branch Network

Scotland

2,184 Weekly timesheets

488 Catering roles

28% Public Sector

73% Commercial



INVESTORS
IN PEOPLE

Platinum
Until 2022



The University Caterers Organisation



Scottish Government
Riaghaltas na h-Alba
gov.scot

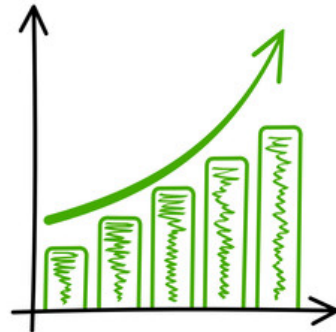


Crown
Commercial
Service
Supplier

Agenda

- Current state of recruitment market
- Demand & pay trends for hospitality roles
- Insights and market expectations from employers
- Becoming an attractive employer
- Improving retention

Current State of Recruitment



Current State of Recruitment



The UK hospitality sector has lost around 93,000 EU workers since Brexit



Two-fifths of hospitality venues had to either totally or partially close during August 2021 due to lack of talent



The UK is currently short around 188,000 hospitality staff

Current State of Recruitment



The ONS reports job vacancies hit 1,298,000



Weatherspoon's are offering free cinema tickets to staff for mental wellbeing



Balhousie Care Group offer £2,000 Golden Hello for all catering roles



Over 80% of candidates prefer to work from home



Atom Bank introduced a four-day week for all staff



65% decrease in applicants per role in the Catering & Hospitality sector



BA moved entire workforces from Catering roles to COVID-19 related roles nationwide



The AA increase pay by £3.50 per hour to £18.00 per hour to attract more candidates



John Lewis increase their overtime rate from 1x to 1.5x & include a £1000 bonus



GXO giving everyone an additional 75p p/h, plus a £35 bonus



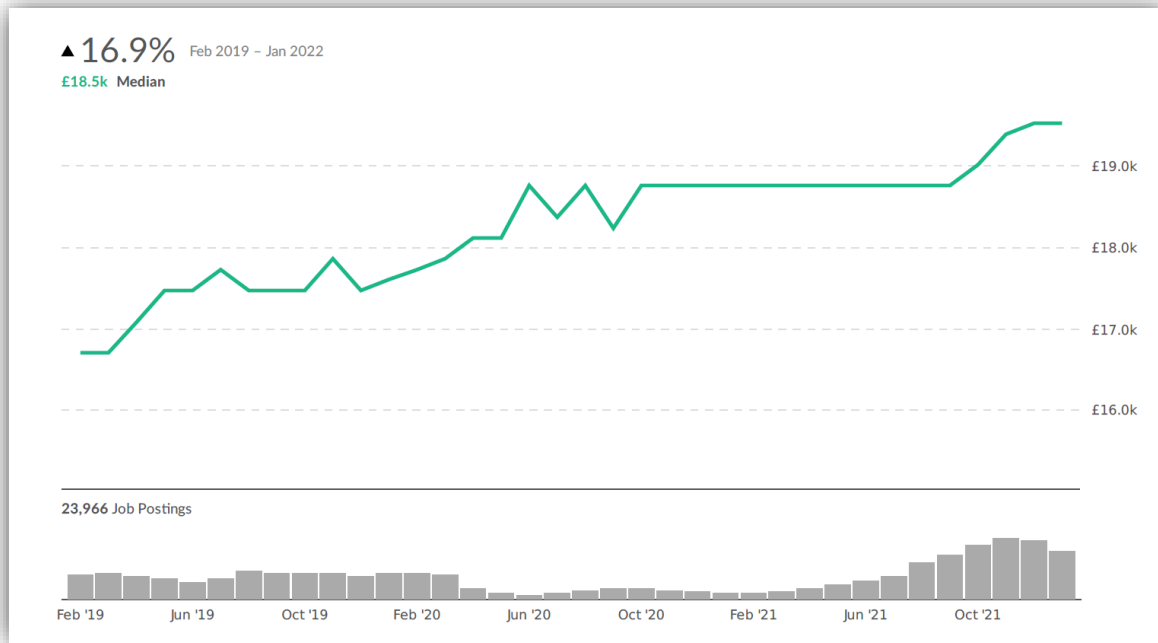
ELIS offering £500 loyalty bonus to all staff completing 12 weeks work

Demand & Pay trends

Kitchen & Catering Assistants

3,659 unique job postings (Jan 2022)

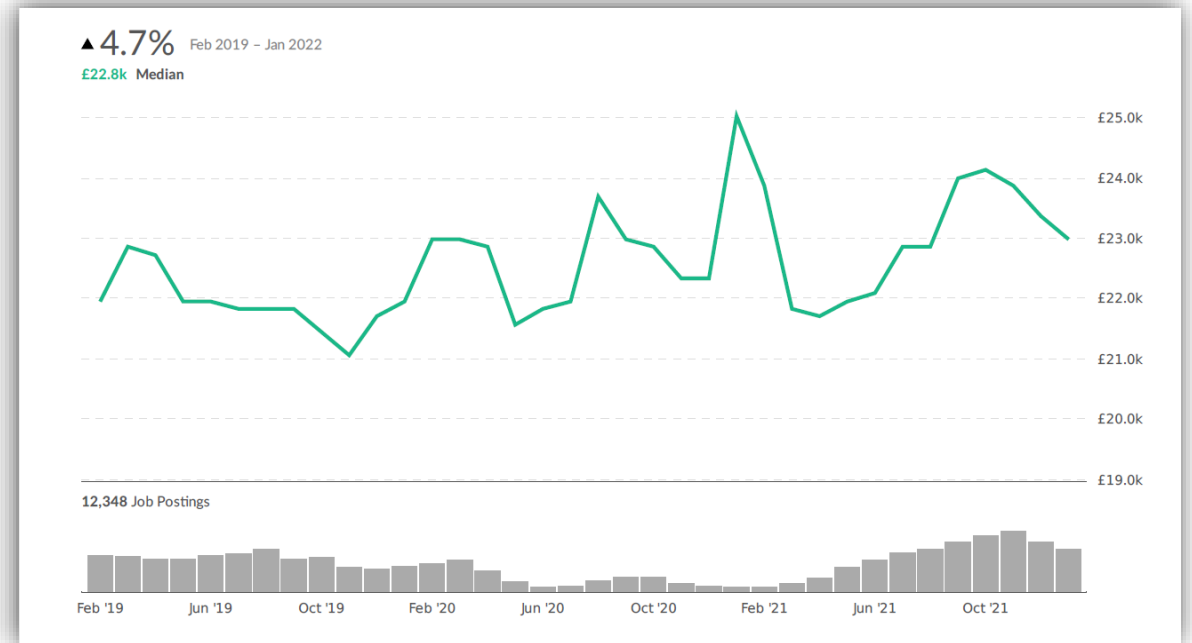
£19.5k – Median Advertised Salary (Jan 2022)



Chef roles

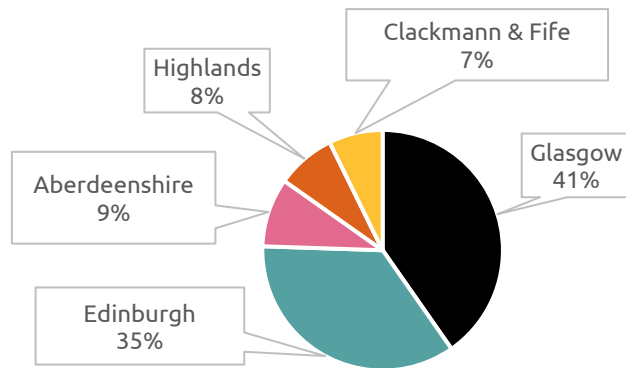
1,432 unique job postings (Jan 2022)

£23k – Median Advertised Salary (Jan 2022)



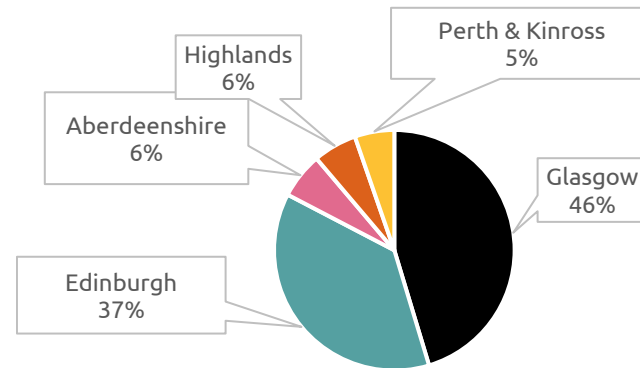
Demand & Pay trends – Job Postings

Kitchen & Catering Assistants



County/Unitary Authority	Unique Postings (Jan 2022)
Glasgow City	932
City of Edinburgh	815
Aberdeen City and Aberdeenshire	241
Highland	184
Clackmannanshire and Fife	168


Chef roles



County/Unitary Authority	Unique Postings (Jan 2022)
Glasgow City	486
City of Edinburgh	400
Aberdeen City and Aberdeenshire	66
Highland	63
Perth and Kinross and Stirling	57

Candidate Data (LinkedIn)


Kitchen & Catering Assistants

- 2,297 Candidate profiles 
- 383 (17%) Changed jobs in last year
- 1.4 years average tenure
- 58% Female, 42% Male

Key Employers

- NHS
- Aberdeenshire Council
- Tayside Contracts
- Fife council
- Compass Group
- BaxterStorey
- North Lanarkshire Council
- Aberdeen City Council

Chefs

- 7,329 Candidate profiles 
- 801 (11%) Changed jobs in last year
- 1.9 years average tenure
- 18% Female, 82% Male

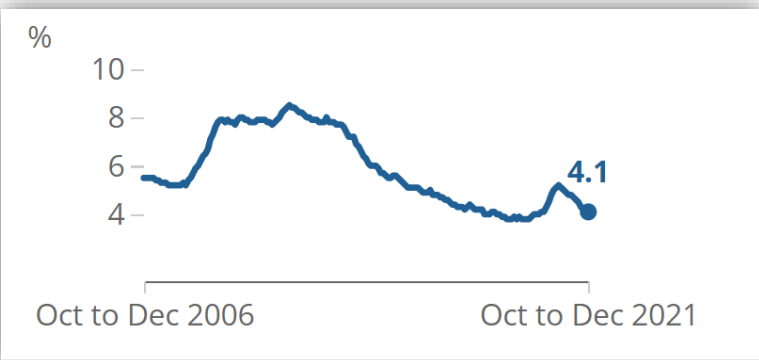
Key Employers

- Sodexo
- Aramark
- Compass Group
- Hilton
- Whitbread
- Greene King
- Mitchells & Butlers
- The Gleneagles Hotel

Expectations in labour market

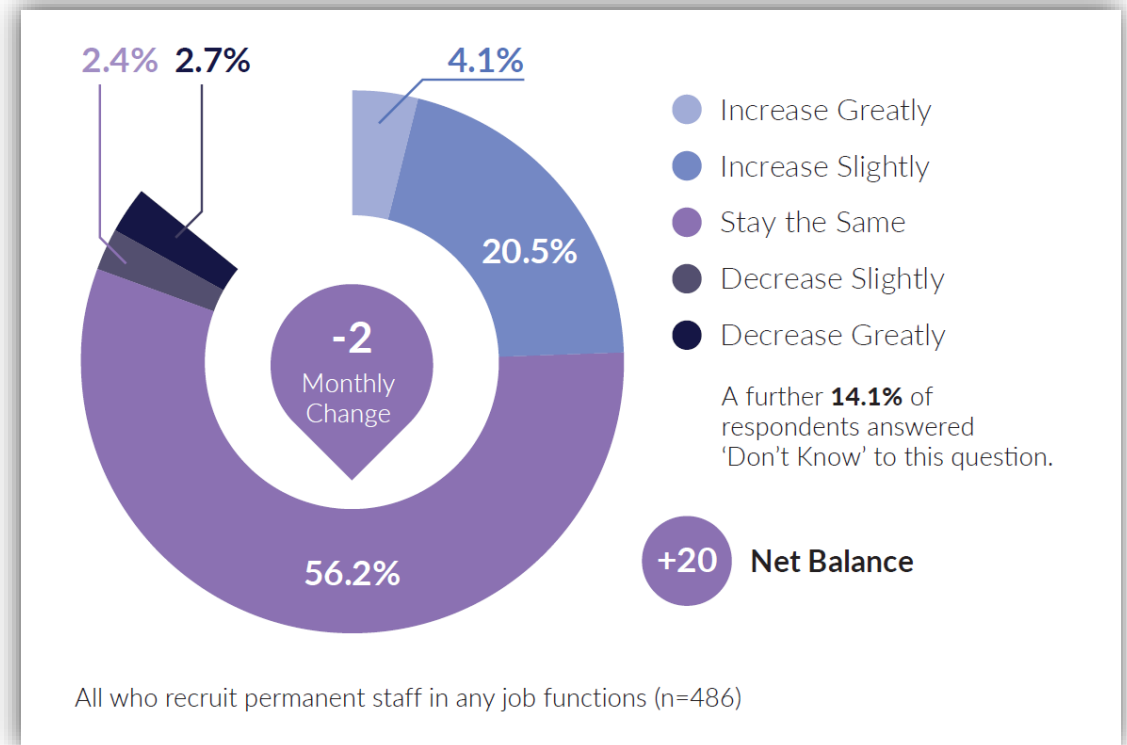


UK Vacancies



UK Unemployment

Do you think the number of permanent workers in your organisation will increase or decrease in the next four to twelve months?



Source: REC Jobs Outlook Jan 22

Expectations in labour market

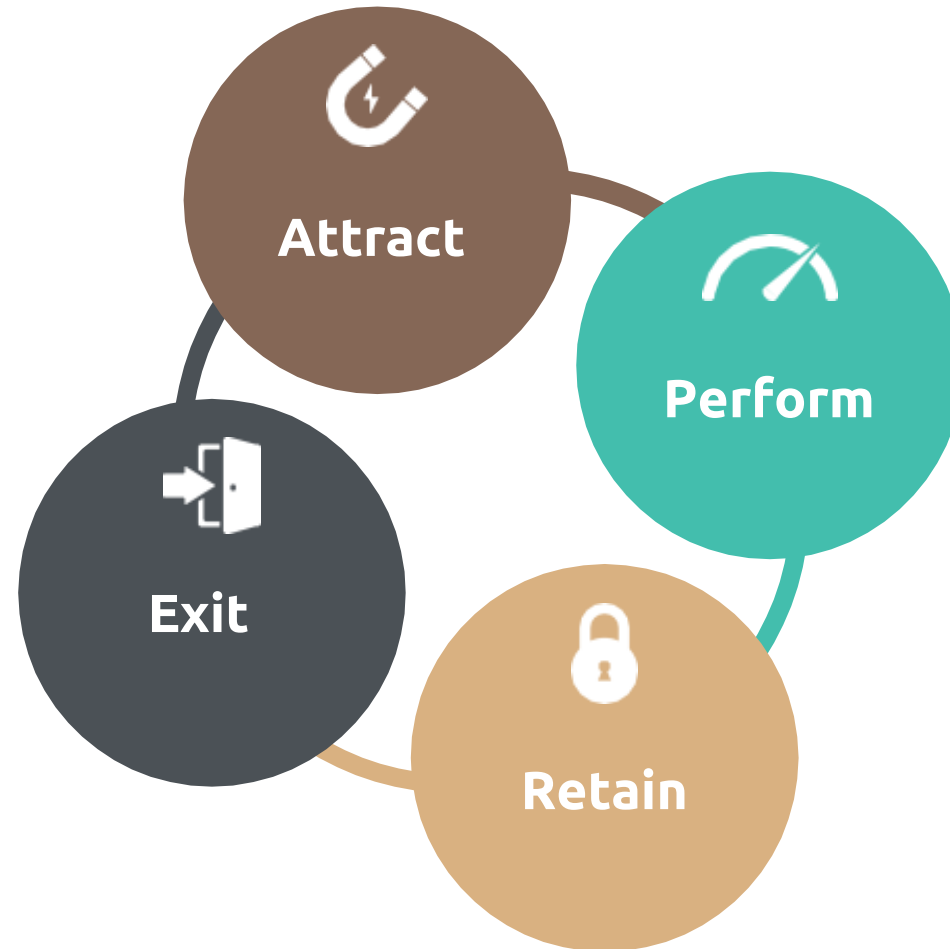
“ ...there is good evidence to suggest that the market will remain tight for some years to come, even if the current crisis passes. Hiring businesses need to assess their workforce plans and work out how they are going to attract and retain the staff they need in the coming months and years. ”

Neil Carberry, Chief Executive of the REC

“ ...a third of companies are now worried that a lack of workers will limit economic growth this autumn, the highest share since the mid-1970s. ...ongoing talent shortages will be with us for another two years. ”

The Confederation of British Industry (CBI)

Candidate to Employee Journey



Candidate Engagement

1. Build on your 'Brand' to stand out from the crowd and become an 'Employer of choice':

- Engage the entire workforce
- Tell your story
- Understand your reputation
- Be bold
- Define your hard edges
- Be clear which talent you're trying to attract
- Be unique

"50% of candidates surveyed wouldn't work for a company with a bad reputation, even for a pay increase."

Gartner[®]

2. Start thinking about the candidates you don't hire:

- Be honest and transparent about your organisation
- Make candidates' lives as easy as possible
- Offer feedback to rejected candidates
- Keep supporting candidates after they get the job

Bad candidate experience was costing them \$1.6 million per year



Improving Retention



70% of their engaged employees have a good understanding of customer needs, compared to 17% for those that are disengaged.



Patient satisfaction is significantly higher where there are higher levels of employee engagement.



59% of engaged employees say that work brings out their creativity, whereas only 3% of those considered disengaged felt creative at work.

Gaining feedback

- Is once a year really enough?
- Do you ask everyone?
- Do you give feedback?

How can your organisation improve employee engagement?

- Recognition
- Managers
- Alignment
- Satisfaction
- Growth
- Wellness

For further info...



Ricky Reyes

Public Sector Manager

Ricky.reyes@bluearrow.co.uk

07920 813990



John O'Brien

Corporate Sales Director

John.obrien@impellam.com

07850 538105



Siobhan Reilly

Associate Director

Siobhan.reilly@bluearrow.co.uk

0131 220 4121



Impellam Group

powered by **blueArrow**



PRINCIPLES

OF HEALTHY, SUSTAINABLE MENUS

MENUS OF CHANGE
The Business of Healthy, Sustainable, Delicious Food Choices



HARVARD T.H. CHAN

SCHOOL OF PUBLIC HEALTH
Department of Nutrition

BE **TRANSPARENT** ABOUT SOURCING AND PREPARATION

BUY



REWARD BETTER AGRICULTURAL PRACTICES

LEVERAGE **GLOBALLY INSPIRED, PLANT-FORWARD** CULINARY STRATEGIES



FOCUS ON **WHOLE, MINIMALLY PROCESSED** FOODS

GROW EVERYDAY OPTIONS, WHILE HONORING SPECIAL OCCASION TRADITIONS

LEAD WITH **MENU MESSAGING AROUND FLAVOR**

REDUCE PORTIONS, EMPHASIZING CALORIE QUALITY OVER QUANTITY

CELEBRATE CULTURAL DIVERSITY & DISCOVERY

DESIGN HEALTH AND SUSTAINABILITY INTO OPERATIONS AND DINING SPACES



MAKE **WHOLE, INTACT GRAINS** THE NEW NORM

LIMIT POTATOES

MOVE LEGUMES AND NUTS TO THE CENTER OF THE PLATE



CHOOSE **HEALTHIER OILS**

GO **"GOOD FAT,"** NOT **"LOW FAT"**

SERVE MORE KINDS OF **SEAFOOD, MORE OFTEN**



REIMAGINE DAIRY IN A SUPPORTING ROLE

USE POULTRY AND EGGS IN MODERATION

REDUCE ADDED SUGAR

CUT THE SALT; RETHINK FLAVOR DEVELOPMENT FROM THE GROUND UP



—SERVE LESS—
RED MEAT, LESS OFTEN

SUBSTANTIALLY **REDUCE SUGARY BEVERAGES,** INNOVATE REPLACEMENTS

DRINK HEALTHY: FROM WATER, COFFEE, AND TEA TO (WITH CAVEATS) BEVERAGE ALCOHOL



PRINCIPLES OF HEALTHY, SUSTAINABLE MENUS

1. Be transparent about sourcing and preparation. Providing customers with abundant information about food production methods, sourcing strategies, calorie and nutrient values, labor practices, animal welfare, and environmental impacts is a necessity in our technology-driven and networked era. Consumer engagement is driven by the rise in food safety and fraud alerts, a growing interest in sustainability and food ethics, and a hyper-connectivity that yields instant access to information such as impending crop failures or the latest farm-labor conditions across global supply chains. Consumers can learn about what they eat regardless of what chefs and businesses share. Given that, foodservice operators can build trust by learning about environmental and social issues in the food system and sharing information about their own practices. Identifying the farms that grow key ingredients, for example, is a strategy that creates value and brand identity and one that is quickly becoming a standard practice. Going further and explaining how food is produced and the rationale for sourcing decisions are the next steps, while limiting or restricting information on hot-button consumer issues such as calories, trans fats, genetically modified ingredients, or processing methods are approaches not likely to survive over the long term. Operators who do not adjust business models and strategies to anticipate the impacts of this accelerating trend risk disappointing the dining public and having to play costly catch-up as such issues assume greater urgency with the public.

2. Buy fresh and seasonal, local and global. For chefs, peak-of-season fruits and vegetables can help create unbeatable flavors—and marketing opportunities. When designing menus, draw ideas and inspiration from local farmers and their crops during your growing season as well as the varieties and growing seasons of more distant regions. The advantages of local sourcing include working

with smaller producers who may be more willing to experiment with varieties that bring interest and greater flavor to the table. A focus on local foods also can play an important role in building community by encouraging school children, retailers, media, and others to learn how to grow food, steward the land, and adopt healthier eating habits. But designing menus to draw on in-season fruits and vegetables from more distant farms also is a key strategy for bringing fresh flavors to menus throughout the year.

3. Reward better agricultural practices. Sourcing sustainably grown foods is complex, but there is one important rule of thumb: the environmental cost of food is largely determined by how it is produced. The best farms and ranches protect and restore natural systems through effective management practices, such as choosing crops well-suited for their local growing conditions, minimizing use of synthetic pesticides and fertilizers, and avoiding the use of groundwater for irrigation. Better-managed farms sometimes qualify for organic or other sustainable-farming certifications. But many—including smaller farms—simply adopt better practices. One such practice is livestock raised without the routine use of antibiotics. Another such practice is minimizing on-farm food loss, through measures such as technological innovations for harvesting and collaborations between producers and others along the supply chain to improve processing, packing, storage, and transport. In total, food loss and waste accounts for an estimated 8 percent of total greenhouse global emissions; reducing it is considered one of the top solutions for reversing global warming. The most powerful strategies for supporting better farms include aligning menus to emphasize fresh foods during the peak of their local growing season and shifting purchases toward farms that have responsible management programs.

MENU CONCEPTS AND GENERAL OPERATIONS





4. Leverage globally inspired, plant-forward culinary strategies. Scientific research suggests that the most effective way to help diners make healthy, sustainable food choices is to shift our collective diets to mostly plant-based foods. Growing plants for food generally has less of a negative impact on the environment than raising livestock, as livestock have to eat lots of plants to produce a smaller amount of food. In fact, no other single decision in the professional kitchen—or in the boardrooms of foodservice companies—can compare in terms of the benefits of advancing global environmental sustainability. From the well-researched Mediterranean diet to the cuisines of Asia and Latin America, traditional food cultures offer a myriad of flavor strategies to support innovation around healthy, delicious, even craveable cooking that rebalances ratios between foods from animal and plant sources.

5. Focus on whole, minimally processed foods. In general, consumers and chefs should first focus on whole, minimally processed foods. Such foods are typically higher in micronutrient value and less likely to contain high levels of added sugars, saturated or trans fats, and sodium. (Indeed, nearly three-quarters of the sodium in the U.S. food supply is estimated to come from processed foods.) Whole, minimally processed foods are also typically slowly metabolized, preventing sharp increases in blood sugar that over time may lead to insulin resistance.

That said, some minimally processed foods—low-sodium tomato paste, wine, nut butters, frozen fruits and vegetables, mayonnaise, dark chocolate, canned low-sodium beans, 100 percent whole-grain crackers, fresh-cut vegetables, spice mixtures, yogurt, reduced sodium sauces, many kinds of canned fish and shellfish, among other things—can be incorporated into healthy meals. Processing can also be used to extend the season of local and sustainably grown produce and to make use of cosmetically imperfect foods, especially produce.

6. Grow everyday options, while honoring special occasion traditions. The foodservice industry historically developed around special occasion dining. Today's industry, however, is increasingly responsible for providing everyday food choices to a substantial segment of the U.S. population. From a health and environmental perspective, there will always be room in the

industry for indulgence and special occasion foods. However, the real opportunity in menu and concept development is the expansion of everyday food and menu choices that embrace current nutrition and environmental science, as well as emerging consumer values about how food is produced.

7. Lead with menu messaging around flavor. To sell healthy and sustainable food choices, lead with messages about flavor, rather than actively marketing health attributes. Research shows that taste trumps nearly all, even if customers want chefs, on some level, to help them avoid foods that increase their risk of chronic disease. Additional research shows that labeling a healthy menu option as healthy can decrease the likelihood of a diner choosing it, whereas using indulgent or flavor-focused descriptions can actually increase the appeal of that same dish. The best approach to menu messaging is to emphasize deliciousness. Messages that chefs care and are paying attention to how and from whom they are sourcing their ingredients—such as by naming specific farms and growing practices (e.g., organic)—can also enhance perceptions of healthier food choices (if, in fact, these choices are healthier—i.e., that they are also consistent with guidance for optimal nutrition).

8. Reduce portions, emphasizing calorie quality over quantity. Moderating portion size is one of the biggest steps foodservice operators can take toward reversing obesity trends and reducing related chronic disease impacts. Defaults are important. This is different from offering multiple portion sizes, as many diners “trade up” to bigger portions, which they see as offering greater value. Consider menu concepts that change the value proposition for customers from an overemphasis on quantity to a focus on flavor, nutrient quality, culinary adventure, new menu formats, and the total culinary and dining experience (thereby mitigating potential downward pressure on check averages). Reducing portion size is essential to reducing plate waste. This is of critical importance because wasting food means wasting valuable resources—from water, energy, and fertilizer to billions of dollars each year. Calorie quality is also especially important. Dishes should feature slow-metabolizing whole grains; plant proteins including nuts, seeds, and legumes; and healthy oils that promote lasting satiety and create great flavors.

9. Celebrate cultural diversity and discovery. Our respect for cultural diversity and the savoring and preservation of family traditions and centuries-old food cultures are as vital as our public health and environmental sustainability. Fortunately, these imperatives can, in fact, be a key to success in implementing the Principles of Healthy, Sustainable Menus. Chefs collaborating with nutrition experts and public policy leaders need to reimagine the role of less healthy, culturally based food traditions by limiting portion size, rebalancing ingredient proportions, or offering them less often. At the same time, many chefs are reporting greater success from introducing new, healthier, and more sustainable menu items instead of reconfiguring existing items. Emerging demographic changes and greater global connectivity are making the American palate more adventurous, giving foodservice leaders a long-term opportunity for creative menu R&D.

10. Design health and sustainability into operations and dining spaces. Food and menu design are not the only ways to advance health and sustainability in foodservice. Choices that affect the way restaurants and other foodservice operations are designed, built, and operated are also important. These include imagining kitchens that support the optimal preparation of fresh, healthy foods and selecting energy- and water-efficient equipment and environmentally friendly building materials. When designing operations and dining spaces for health and sustainability, consider ways to reduce food waste. Best practices include: measuring and tracking waste through smart scales (which can also reduce overproduction), precise inventory management, building the reuse of previously unused ingredients into cycle menus, and trayless dining in all-you-care-to-eat settings. Operators who implement food waste reduction initiatives are likely to see remarkably high returns on their investment. In addition, behavioral economics studies have shown that dining room operations and foodservice eating spaces also deserve more attention: design, setup, service, and communication strategies can all lead consumers toward healthier, more sustainable choices.

PRINCIPLES

OF HEALTHY, SUSTAINABLE MENUS

FOODS AND INGREDIENTS

1. Think produce first. Focus on fruits and vegetables first—with great diversity across all meals and snacks. Recognize that customers aren't eating nearly enough produce—they should be filling half their plates. Consider also that far too much produce goes uneaten because it's considered misshapen or blemished; purchasing "imperfect" foods, including fruits and vegetables, and making use of byproducts can go a long way toward supporting circular economies, which are based on regenerative utilization of natural resources as opposed to merely extraction. Menus should feature green leafy vegetables and a mix of colorful fruits and vegetables daily. Fruit is best consumed whole or cut, fresh and in season, or frozen and preserved without added sugar or salt. Fruit juice often contains healthy micronutrients, but it also packs a large amount of fast-metabolizing sugar and should be limited to one small glass per day. Dried, unsweetened fruit is also a good choice; though it contains natural sugars, it also contains fiber, which can mitigate negative blood sugar response.

2. Make whole, intact grains the new norm. Menus should offer and highlight slow-metabolizing, whole, and intact grains, such as 100 percent whole-grain bread, brown rice, and whole-grain/higher protein pasta. Use white flour and other refined carbohydrates sparingly, as their impacts on health are similar to those of sugar and saturated fats. Ideally, new menu items should emphasize whole, intact, or cut—not milled—cooked grains, from wheat berries and oats to quinoa, which can be used creatively in



salads, soups, side dishes, breakfast dishes, and more. In baking, blend milled whole grains with intact or cut whole grains to achieve good results. For sandwich menus, equally appealing whole-grain bread options should always be available, and, if possible, served as the default option.

3. Limit potatoes. Potatoes have rapid metabolizing impacts on blood sugar, which is of special concern as they are regularly used as a starch to fill plates. Chefs can limit their use of potatoes by combining small portions of them with other, non-starchy vegetables, or featuring them as an occasional vegetable, as they do green beans, broccoli, carrots, and peppers. Chefs should also consider healthier alternatives including sweet potatoes, which are rich in beta-carotene and other vitamins, and healthier side dishes that highlight fruits, vegetables, whole grains, legumes, and nuts.

4. Move nuts and legumes to the center of the plate. Nuts and legumes are full of flavor, contain plant protein, and are associated with increased satiety. Nuts contain beneficial fats, while legume crops contain fiber and slowly metabolized carbohydrates. Legumes also are renowned for helping to replace nitrogen in the soil and produce impressive quantities of protein per acre. Nuts (including nut butters, flours, and milks) and legumes (including soy foods and legume flours) are an excellent replacement for animal protein. They also are a marketable way to serve and leverage smaller amounts of meat and animal proteins.

5. Choose healthier oils. Using plant oils and other ingredients that contain unsaturated fats, such as canola, soy, peanut, and olive oils, as well as featuring fish, nuts, seeds, avocados, and whole grains, are simple ways to create healthier menus. Research shows that reducing saturated fat is good for health if replaced with "good" fats, especially polyunsaturated fats, instead of refined carbohydrates such as white bread, white rice, mashed potatoes, and sugary drinks. High-flavor fats and oils that contain more saturated fat—including butter, cream, lard, and coconut oil—can have a place in healthy

cooking if used only occasionally in limited, strategic applications. Trans fats from partially hydrogenated vegetable oils, now labeled a "metabolic poison" by leading medical scientists, have no place in foodservice kitchens.

6. Go "good fat," not "low fat." Current nutrition science reverses the mistaken belief that we need to limit all fat. Moderate and even high levels of beneficial fats in the diet—from (most) non-hydrogenated plant oils, nuts, nut butters, avocados, and fish—are associated with optimal nutrition and healthy weight. Beneficial fats paired with an abundance of vegetables, whole grains, legumes, and nuts can give our diets a baseline of slow-metabolizing, healthy foods, which are associated with increased satiety. A more liberal usage of healthy fats, offering the potential to deliver high-impact flavors, might represent the difference between consumers liking—or not liking—healthier and more environmentally friendly foods. Even small, occasional servings of deep-fried foods and condiments are appropriate offerings if operators use healthy, non-hydrogenated oils, and avoid potatoes, breading, and other refined carbohydrates in favor of fish, vegetables, legumes, and legume flour. Research confirms that the vast majority of people report better adherence to a moderate- or higher-fat, healthy diet.

7. Serve more kinds of seafood, more often. Seafood is an important part of a healthy diet, and most Americans don't eat the recommended one to two servings per week of fatty fish, which contain higher levels of health-promoting omega-3s. However, the focus on just a few species is emptying parts of our oceans of popular types of seafood such as cod and tuna and now also fish like menhaden that are a key ingredient in feed for some types of farm-raised fish. Scientific studies have found that the benefits of eating seafood greatly outweigh the risks and that removing or reducing seafood from the diet can have negative effects on health. Serving more kinds of seafood more often from responsibly managed sources is the priority. Chefs can have a positive impact on the environment and public health by expanding their understanding of how

to source and use a greater variety of responsibly managed and underutilized wild-caught and farm-raised fish and shellfish.

Serving small fish like sardines and anchovies, as well as clams, oysters, mussels, mollusks, and other low-trophic species (meaning lower on the food chain) are also good choices for our health and the environment.

8. Reimagine dairy in a supporting role. While there is tremendous innovation underway to improve dairy production and its impact on the environment, the nutrition science on dairy is still unsettled and evolving. Current research suggests that it seems prudent for individuals to limit milk and dairy to one to two servings per day. Chefs should leverage the flavor of cheese (high in saturated fat and sodium) in smaller amounts and minimize the use of butter. Yogurt (without added sugar) is a good choice for professional kitchens, as its consumption is associated with healthy weight.

9. Use poultry and eggs in moderation. Antibiotic-free chicken and other poultry in moderation is a good choice for healthier protein with a far lower environmental footprint than red meat. Chefs should avoid or minimize the use of processed poultry products, which are high in sodium, often as a result of sodium pumps and brining. Eggs in moderation—an average of one per day—can be part of a healthy diet for most people. Creative menu items that mix whole eggs and egg whites for omelets, and eggs with vegetables, are ideal.

10. Serve less red meat, less often. Red meat—beef, pork, and lamb—can be enjoyed occasionally and in small amounts. Choose products from animals raised without the routine use of antibiotics, and that have been grass-fed or primarily pastured. Current guidance from nutrition research recommends consuming a maximum of one to two 3-ounce servings of red meat per week. Chefs and menu developers can rethink how meat is used by featuring it in smaller, supporting roles to healthier plant-based choices, and experimenting with meat as a condiment. From at least some environmental

perspectives (e.g., GHGE, feed efficiency ratio), pork is the better choice among red meats (though not distinguishable from a nutritional perspective). This is in part because growing copious quantities of corn only to feed it to cows is itself a form of food waste. Saturated fat is one health concern associated with red-meat consumption, but it's not the only issue. Chefs should strive to limit bacon and other processed and cured meats, which are associated with even higher incidence of chronic disease and some cancers than unprocessed red meats. Many diners choose to splurge on red meat when they eat out, and for many there will always be an appropriate place for meat-centered dishes. But chefs can help to shift eating patterns by building a sense of theater and value in menu concepts that don't rely so heavily on a starring role for animal protein. For example, they might offer delicious meat/vegetable and meat/legume blends, or smaller tasting portions of red meat as part of vegetable-rich, small-plate formats.

11. Reduce added sugar. Consumers crave sugar, and the foodservice industry responds by selling processed foods and sweets that are loaded with it. But sugar's role in spiking blood-sugar levels and increasing rates of type 2 diabetes and other chronic diseases means that professional kitchens should substantially restrict its use. Various strategies include: choosing processed foods with little or no added sugar; favoring healthy oils over sugar in products such as salad dressings; featuring smaller portions of dessert augmented with fruit; and substituting whole, cut, and dried fruit for sugar in recipes. There is nothing wrong with an occasional dessert; but pastry chefs and dessert specialists need to take up the challenge to create sweets centered on whole grains, nuts, dark chocolate, coffee, fruit, healthy oils, yogurt, small amounts of other low-fat dairy and eggs, and, as appropriate, small amounts of beverage alcohol—with the addition of only small to minimal amounts of sugar and refined carbohydrates. Fresh thinking about dessert menu language and positioning is also needed, as illustrated by such concepts as the Three Pleasures: a challenge to restaurants to create a delicious dessert using only dark chocolate, nuts, and fresh-cut or dried fruit.

12. Cut the salt; rethink flavor development from the ground up. The foodservice and food-manufacturing sectors have long been too reliant on salt to do the heavy lifting to create high flavor impact and customer satisfaction. Single items, such as a sandwich or entrée, might contain more than 2,500 milligrams of sodium, well above the current maximum recommended intake of 1,500 milligrams to 2,300 milligrams for the entire day. Chefs should focus on a range of other strategies

to deliver flavor, including: sourcing the best-quality, highest-flavor produce; working with spices, herbs, citrus, and other aromatics; and employing healthy sauces, seasonings, and other flavor-building techniques from around the world. Many chefs are finding success in focusing their innovation where they have the highest aggregation of sodium (e.g., processed meats, cheese, and bread) in a single menu item. Others are making progress in implementing an across-the-board incremental 10 to 20 percent sodium reduction in their preparations. Still others are focusing on collaborating with manufacturing partners to reduce sodium by using alternative strategies to create desired flavors and textures.

13. Substantially reduce sugary beverages; innovate replacements. A drastic reduction in sugary beverages represents one of the biggest opportunities for foodservice operators to help reverse the global obesity and diabetes epidemics. Sugary beverages add no nutritional value and contribute negligible satiety. Yet they are a prime source of extra calories in the diet and a principal contributor to the development of type 2 diabetes, heart disease, and other chronic conditions.

Smaller portion sizes and less frequent consumption are steps in the right direction, but nowhere in foodservice is there a greater need for creative, “disruptive” innovation than in the challenge to replace current soda and sugary beverage formulations with more healthful options. Operators should diligently research, support, and promote the products of entrepreneurs and emerging and established brands that are rapidly developing beverage solutions in this important area. Diet sodas and other diet beverages, though lower in calories, may reinforce an aggregate preference for sweet flavors, potentially driving down the appeal of vegetables and other healthy foods. As such, they should be consumed in smaller portions less frequently.

14. Drink healthy: from water, coffee, and tea to (with caveats) beverage alcohol. Water is the best choice to serve your customers, either plain or with the addition of cut-up fruit, herbs and aromatics, or other natural flavors—but no sugar. Served plain, coffee and tea are calorie-free beverages containing antioxidants, flavonoids, and other biologically active substances that may be good for health. Wine, beer, and other beverage alcohol present a more complicated story of benefits for many individuals, with some offsetting risks. Current nutrition guidance suggests a maximum of two drinks per day for men, and one drink per day for women.





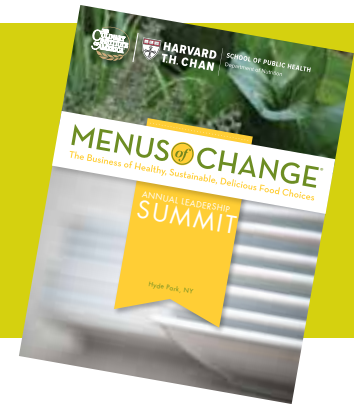
**HARVARD
T.H. CHAN**

SCHOOL OF PUBLIC HEALTH
Department of Nutrition

10TH ANNUAL LEADERSHIP SUMMIT
MENUS^{of} CHANGE[®]

THE BUSINESS OF HEALTHY, SUSTAINABLE,
DELICIOUS FOOD CHOICES

June 14 – 16, 2022
Hyde Park, NY



INTRODUCTION & OVERVIEW

Our Vision THE CHALLENGE

Food is a lens through which we see the world, and increasingly our vision is focused on our health, the health of communities, and that of our planet. Through our food choices, we express our preferences, values, concerns, and aspirations—all of which significantly impact the world around us.

Our food choices—linked as they are to both acute and chronic disease prevention and control—are a primary driver of our health. These same choices affect the livelihoods of more than one billion people around the world who work each day to produce and serve our food.

Food and agriculture production has a larger impact on our planet than any other activity, occupying a quarter of all arable land, affecting the state of oceans and wildlife habitat, consuming most of the world's water and a fifth of the energy we produce, and creating a fifth of greenhouse gas emissions.

When we look at the state of our planet, with increasing rates of both hunger and obesity—and eroding food security igniting social unrest—we want a better future.

When chefs and foodservice industry leaders look at the challenges they face—the need to simultaneously address the rising costs of food; the need to improve the health of their customers and reduce the environmental impacts of their products; increasing demand for supply chain transparency and increasing risks to brand reputation because of how globalized the supply chain is; the complexity of serving an increasingly diverse population with splintering preferences and attitudes; and the overall declining effectiveness of current business models—they, and we, crave the skills and insights to allow us to adapt and lead before the future arrives.

“*Compass Group chefs and Registered Dietitian-Nutritionists have seen tremendous value in our participation in Menus of Change since the inception. We have been inspired to take action in all of our businesses to create environmentally friendly menu options that promote both personal and planetary well-being in a business savvy way. With 24 different MOC principles, it gives chefs the flexibility to incorporate those principles that work best for their guests. I have personally seen the collective power of us each make at least one change every day.*”

**DEANNE BRANDSTETTER,
MBA, RD**

Vice President of Nutrition & Wellness

Compass Group USA



Threaded through all of this is our modern lifestyles that provide less and less time to cook but increasing appetites for new culinary directions and food that is perceived to be “real” and health-promoting. At precisely the same moment when the world’s interest in food and food choices is growing, we are asking chefs to make more choices on our behalf as we select and prepare fewer meals in our own homes.

As we move further into the 21st century, chefs and culinary leaders are poised to assume a larger, pivotal role in integrating key imperatives of taste, health, the environment, community, business and economics.

Against this background, we see a path forward where:

- Our most delicious foods—by design—can also be health promoting and environmentally sustainable.
- America’s most talented chefs, scientists, and business leaders, along with today’s culinary students, are collectively engaged in driving towards business-friendly solutions to our obesity and healthcare crises—and challenges to the future of our global food security.
- New approaches to collaboration between nutrition and medical experts, chefs, and environmental scientists help the business community develop new models of innovation—and new, long-term business strategies—around opportunities for the future of food and foodservice.

OVERVIEW

Menus of Change: *The Business of Healthy, Sustainable, Delicious Food Choices* is a ground-breaking leadership initiative launched in 2012 by The Culinary Institute of America and Harvard T.H. Chan School of Public Health that works to realize a long-term, practical vision integrating optimal nutrition and public health, environmental stewardship and restoration, and social responsibility concerns within the foodservice industry and the culinary profession.

In just its first nine years, Menus of Change has established a compelling new agenda for the foodservice industry through an annual leadership summit at the CIA’s Hyde Park campus, an annually updated compilation of resources on the state of the industry, and an ongoing series of tools and guidance for foodservice professionals. Menus of Change also informs The Culinary Institute of America’s approach to educating the next generation of culinary and business leaders.



The initiative's thought-leadership includes:

- Showing that changing menus is a powerful, and previously underappreciated, way to drive improvements in our health and our planet, and also is the most important part of doing business in the restaurant and foodservice industry.
- Connecting dietary change and sustainability, and setting the stage for incorporating sustainability into the recommendations of the 2020 Dietary Guidelines Advisory Committee's report to inform the Dietary Guidelines for Americans.
- Bringing attention to protein, both animal- and plant-based, to show how that macronutrient category has the largest impact on the environment including climate change.
- Making plant-forward dining a mainstream concept in the culinary profession and foodservice industry, with a clear vision for a new way to cook and serve food to others.
- Introducing and advancing new considerations for menus and ingredient choices that are now mainstream, such as the water footprint of food and how to reduce antibiotic use in livestock production.



Along the way, the Menus of Change initiative has engaged thousands of leaders in the foodservice industry around this vision. Involvement in Menus of Change has led to substantial changes in what these foodservice operators choose to buy and serve to diners:

- Of recent Menus of Change summit attendees, more than 80 percent have changed their menus and dining formats as a result of attending the annual program series.
- Over half of these same attendees have changed their sourcing practices.
- From corporate dining to multi-unit restaurant groups, operators across the country are adopting the Menus of Change platform and principles as part of their strategic planning process.
- More than 60 college and university foodservice operations—members of the Menus of Change University Research Collaborative—are conducting and sharing research and education in support of culinary-centric, evidence-based food systems innovation within and beyond universities.



Background A GAME-CHANGING LANDSCAPE AHEAD

Agriculture, population growth, and environmental pressures

The United Nations forecasts that the Earth's population will swell to nearly ten billion people by the year 2050—putting enormous pressure on agriculture, the environment, and global food prices. In the face of likely increased food insecurity and resulting political instability, current patterns of dietary change in developed and developing countries—increasingly reliant

on commodity foods that are energy-intensive and both inefficient and costly to produce—will surely see severe disruption.

The impacts of climate change, water scarcity, and the likely continued escalation of energy costs over the next 20, 30, and 40 years will further upend agricultural production and constrain food choices.

In 2030 global water needs are projected to grow from 4,500 billion cubic meters to 6,900 billion cubic meters, with food and agriculture remaining the largest user of water. According to a recent report, *Charting Our Water Future 2030*, by the Water Resources Group, this will represent a demand that is 40 percent greater than current, accessible, and reliable water supplies can provide. Quite clearly this will throw the issue of high agricultural water use as a function of food choices into sharp focus.

Today—long before 2030—our global food and agricultural sector is already exhibiting symptoms of intense pressures. Severe weather, drought, and social instability are affecting the profitability of large food companies along with the stability of governments in the Middle East, Asia, and Africa. A host of contemporary environmental and social responsibility issues are challenging the adequacy of our current models of agriculture and food production, from concerns about the cumulative effects of non-therapeutic hormones and other production practices in livestock production to groundwater contamination, soil degradation, and collapsing fisheries.

At the same time, challenges to current models of food systems and large-scale,



production agriculture over environmental concerns quickly raise questions about how much we as a society—or as individual consumers—are willing to pay for solutions to such imperatives.



Frontiers of nutrition research

Current nutrition science has confirmed the extraordinary links between diet and health. In these challenging times, the unsustainable rise in health care costs will increasingly be laid at the feet of unhealthy diets and rising obesity rates. Following trend lines into the future, it will become ever more difficult to justify any lack of alignment between food, agricultural, and nutrition policy—creating a wide range of impacts for American business.

Recently the Centers for Disease Control and Prevention (CDC) underlined the approaching severity of the obesity threat. By 2030, 42 percent of Americans are expected to be obese if trends aren't reversed. But simply preventing an increase over the current rates of obesity in future years could reduce future health care costs by \$550 billion between 2012 and 2030. Other recently released CDC data indicate that the number of teens in the U.S. with diabetes or prediabetes has skyrocketed over the last decade, climbing from 9 to 23 percent, nearly one quarter of all young people.

American and European food and drink manufacturers who are increasingly looking to world markets for expansion are now facing dark clouds on that landscape in the form of a rising, global diabetes epidemic. In China, for example, with the rapid change in lifestyle, nearly 92 million Chinese now have type 2 diabetes—and another 148 million Chinese adults have prediabetes. Also in Asia, Singaporeans are on track to incur a 50 percent lifetime risk of developing diabetes.

And finally, on the diet and health front, there is this startling macro calculation: scientists now estimate that fully 80 percent of major chronic diseases are preventable through changes to diet and lifestyle, i.e., eating a healthy diet and avoiding obesity, not smoking, and engaging in regular physical activity.

Consumer attitudes and concerns

On the consumer side, concerns about where our food comes from and how it was produced—in effect, whether it is healthy, environmentally sustainable, locally sourced, and created in a socially responsible manner—are growing rapidly, especially among younger demographic groups. Consumers' aspirations sometimes outpace their buying decisions—and, additionally, are often contradictory and based more on emotion or personal philosophy than science. But there is no question that a new paradigm of what constitutes “good food” has been taking hold across America. The business community and consumers are also in a prolonged dialogue about whether you have to be a “good food company” in order to serve them.



Food manufacturers are finding growing demand for products that consumers and chefs deem to be “natural” and “whole,” while the public—rightly or wrongly—increasingly holds “processed food” in very low regard. Even during the recent recession, the market for “real food” continued to grow at more than 10 times the industry average, the same rate as prior to 2008. While price still drives most professional and consumer purchases, rising consumer interest and discontent portends change ahead. Despite considerable and growing efforts by the foodservice industry to develop healthier menu choices, there is still much more work to do.

Changing appetites

On the culinary front, looking to the future, a shrinking sense of the world will make formerly “foreign” foods, flavors, and culinary ideas commonplace, creating an explosion of possibilities for American chefs, foodservice operators, food producers, and home cooks. Every ingredient, culinary technique, and flavor strategy from Asia, Latin America, Europe, Africa, and the Middle East will be instantly within consumers’ easy reach—and the reach of those in business catering to their needs. In response, Americans are increasingly embracing bolder flavors, culinary diversity, and “adventure” in ways that are transforming the market.

Demographic shifts

In 2050, very much within the career timeframe of current culinary school graduates, the U.S. Census Bureau forecasts that Caucasian Americans will be in the minority. By then, Hispanics and Asians together with their non-European food cultures will comprise more than one-third of the population. Expectations about food will be driven both by time spent in the U.S. and also the nature and diversity of this rapidly growing demographic group’s cultural and culinary traditions. This trend alone is a formula for a paradigm shift within the foodservice and food manufacturing sectors.



“The partnership between The Culinary Institute of America and Harvard has produced some of the most meaningful changes in what we eat. The CIA and Harvard have identified key nutrition science findings for the food industry and translated them into practical advice for business and culinary professionals. With the increasing convergence of findings around food issues in both public health and environmental disciplines, the Menus of Change initiative promises to make even more significant changes in how we think about food and what we choose to eat.”

WALTER WILLET
MD, DrPH

Chair of the Menus of Change
Scientific and Technical
Advisory Council

Professor of Epidemiology and
Nutrition and Past Chairman,
Dept. of Nutrition

*Harvard T.H. Chan School of
Public Health*

Convergence of trends and issues

Between now and 2030, and 2050, these trends and imperatives will begin to converge, accelerating challenges and opportunities for American business. Because of the nature of professional, academic, and social interests, these trends and issues are now often addressed individually, with little reference to possible synergies or competition with other trends and challenges. For business leaders and entrepreneurs working in the food and foodservice industry sectors, such lack of integration will surely undermine the pace of innovation—and the staying power of such innovation through the turbulent changes ahead.

With this background, Menus of Change has been designed to address a number of key questions:

- How do business leaders and entrepreneurs get ahead of these changes and start to design and build new models for innovation and business success? How can these models start to anticipate the acceleration of trends as we head into successive decades leading up to 2030, 2040, and 2050?
- Students graduating from culinary schools and young entrepreneurs starting food-related businesses right now will see these changes unfolding throughout their careers. How do they need to prepare?
- What is the leadership potential of chefs and other culinary and foodservice professionals to help frame and communicate new models for the business of healthy, sustainable food choices in ways that substantially increase consumer acceptance? How can we make these foods delicious as well as affordable and accessible?
- How can we work to preserve the best of food traditions around the world—and honor cultural diversity—through this upcoming period of change?
- How do we leverage the emerging fields of culinary science and technology to increase our success in integrating nutrition, sustainability, and culinary insight—in a landscape of diminished budgets and challenging labor markets?
- What might be the best approach to integrating our current scientific understanding of optimal human nutrition, environmental sciences, food systems, business and management with the culinary arts and sciences within academia to achieve the best theoretical and practical outcomes?



GOAL OF THE INITIATIVE

The goal of **Menus of Change: *The Business of Healthy, Sustainable, Delicious Food Choices*** is to create and grow a world-class structure of collaboration between leaders in nutrition research and public health, the environmental sciences and sustainability, the culinary arts, and business and management to consider and incubate new models of food and foodservice innovation that anticipate future imperatives and are economically sustainable. Menus of Change also strives to provide the next generation of culinary and business leaders the skills and knowledge to work at the intersection of health, environmental, and social concerns.

OBJECTIVES

1. Create a cross-disciplinary community and leadership forum for the food and foodservice sectors and related academic fields that foster innovation around the integration of health and wellness, environmental sustainability, social responsibility, business and economics, and the culinary arts.
2. Build evidence-based models for healthy, sustainable, and delicious food choices that can serve as a gold standard and reference point for current and near-term industry innovation.
3. Develop future scenarios—tied to periodic intervals leading up to 2050—that integrate our understanding of the frontiers of nutrition research, healthcare trends, environmental issues and trends, population and demographic trends, and food supply and security issues so as to establish a science-based, long-view context for business planning, economic modeling, and entrepreneurship.
4. Stimulate and support innovation across all scales and types of food businesses and sectors, from small and regional to large, national, and international, tied to this integrated vision of these issues.
5. Design an industry-standard culinary education curriculum serving both students and professionals that for the first time integrates these issues and imperatives in a way that is easily grasped—and is actionable—by students in and graduates of culinary, continuing education, and industry leadership programs.
6. Provide an online and social media platform that brings this information and these ideas to all interested parties in the foodservice industry, related academic fields, and beyond.
7. Leverage this collaboration in order to inspire change and innovation outside the foodservice sector, in agriculture, retail, food manufacturing, food marketing, the media, and in home kitchens.





OUR APPROACH

- Begin by understanding the state of the art of what current nutrition and environmental research and social responsibility imperatives tell us about the shape of *optimal* diets.
- Be clear about what is currently unhealthy and environmentally unsustainable.
- Honor the historical role of our industry to create special-occasion foods and celebratory dining experiences.
- Recognize that, increasingly, Americans are turning to chefs and foodservice providers for healthy, everyday meals, snacks, and beverages.
- Consider costs and economic modeling with reference to a variety of possible consumer behavior responses and policy shifts.
- Work backwards from our best projections about how the world of 2030, 2040, and 2050 will likely transform the business environment then and over the next three decades.
- Consider the balance between public health, policy initiatives, and the freedom of individual choice in a competitive marketplace—and how the calculus of this balance may change over time because of such pressures.
- Recognize that business cannot always avoid change that runs counter to its immediate economic interests, and that the next best thing is to have clear intelligence about the contours of the future business, consumer, scientific, and policy environments in order to facilitate planning and mitigate risk.
- Consider the potential of the culinary community of trained chefs and other professionals to provide the business community and policy makers with approaches to the evolution of food and menu choices that increase the appeal for consumers and reduce potential negative reaction.

DEFINING PLANT-FORWARD: GUIDANCE FOR OUR INDUSTRY

PLANT-FORWARD

A style of cooking and eating that emphasizes and celebrates, but is not limited to, plant-based foods—including fruits and vegetables (produce); whole grains; beans, other legumes (pulses), and soy foods; nuts and seeds; plant oils; and herbs and spices—and that reflects evidence-based principles of health and sustainability.

HEALTHY, SUSTAINABLE, PLANT-FORWARD FOOD CHOICES

This distilled guidance about the future of our food choices, for individuals and professionals, is an outgrowth of multiple, joint leadership initiatives of The Culinary Institute of America and the Department of Nutrition at Harvard T.H. Chan School of Public Health, including Menus of Change; Healthy Kitchens, Healthy Lives®; and the Teaching Kitchen Collaborative. It reflects the best current scientific evidence supporting optimal, healthy, and sustainable dietary patterns while addressing vital imperatives to achieve short- and long-term global food security.

Healthy, sustainable, plant-forward food choices—when informed by culinary insight—can transform palates and spur next-generation innovation, as is evident in the success of new menu, restaurant, and retail product concepts thriving in the marketplace. In short, this is a practical, achievable vision for a delicious future. For more information, please read the Principles of Healthy, Sustainable Menus at menusofchange.org.

Plant-forward is primarily envisioned as a B2B term, not a way to describe dishes on menus. For that, operators are encouraged to lead with descriptors that convey flavor, quality, deliciousness, sense of place, ties with local producers, seasonality, culinary adventure, cultural contexts or heritage, fun, and/or innovation or invention—according to their distinct restaurant or foodservice concept.

HEALTHY, SUSTAINABLE, PLANT-FORWARD FOOD CHOICES ARE THOSE WHICH:

- Feature minimally processed, slow-metabolizing plant-based foods: fruits and vegetables (produce); whole grains; beans, other legumes (pulses), and soy foods; nuts and seeds; healthy plant oils; and herbs and spices.
- Place animal-based foods in a reduced or optional role, with a special emphasis on decreasing purchases of red meat and minimizing foods sourced from animals raised with the routine, non-therapeutic use of antibiotics. These choices prioritize fish and poultry among animal-based proteins, with dairy options and eggs playing a supporting role (if desired).
- Might include vegetarian and vegan choices.
- Highlight the value of fresh, seasonal, locally produced foods; minimize sugary beverages and added sugars and sweeteners; and reduce sodium and unhealthy additives.
- Emphasize healthy dietary patterns and a rich diversity of whole foods versus an undue focus on specific nutrients and percentages; avoid excess quantities of calories but first ensure calorie quality.
- Celebrate cultural diversity, personal needs and preferences, and the unapologetic elevation of deliciousness, including room in our diets for foods of special occasions.
- Begin with transparent ingredient sourcing that supports sustainable farming methods and fisheries.
- Through food purchasing patterns, encourage innovation and sustainable practices in retail food and restaurant concepts and business models to advance public health, social wellbeing, and our food system.



CHEFS, RESTAURANTS, & AMERICAN FOODSERVICE

Chefs are at the heart of the American foodservice industry, from fine dining and casual independent restaurants to K-12 and university foodservice, corporate contract foodservice, and chain and multi-unit restaurants.

The influence of chefs today extends far beyond restaurants and foodservice to the shaping of consumer attitudes and appetites from the supermarket to the home. They are flavor experts, masters of technique, and researchers of world food traditions—and they are in the best position to make healthy foods craveable. They are ubiquitous on television and in the pages of most glossy lifestyle publications. Chefs advise multi-billion-dollar food and foodservice companies on menu and product strategies, and are increasingly the face of food marketing.

And in addition, many chefs are passionate and actively engaged in advancing healthier food choices in restaurants and schools, and advancing issues of sustainability and social responsibility, in part driven by the interests and concerns of their customers.



THE CULINARY INSTITUTE OF AMERICA (CIA)

Founded in 1946, The Culinary Institute of America is the world's premier culinary college. Dedicated to developing leaders in foodservice and hospitality, the independent, not-for-profit CIA offers bachelor's degree majors in management, culinary science, and applied food studies; associate degrees in culinary arts and baking and pastry arts; and a master's degree in food business through its Food Business School. The college also offers certificate programs and courses for professionals and enthusiasts. Its conferences and consulting services have made the CIA the think tank of the food industry and its worldwide network of 50,000 alumni includes innovators in every area of the food business. The CIA has campuses in New York, California, Texas, and Singapore. For more information, visit www.ciachef.edu.

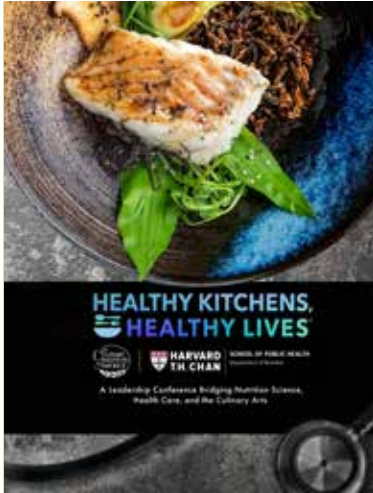
Each year the CIA stages or conducts a comprehensive portfolio of industry leadership programs and initiatives, from international conferences and invitational leadership retreats to healthy flavors research initiatives. The college's Worlds of Flavor® International Conference & Festival is our country's premier educational forum dedicated to the discovery and exploration of world flavors, cultures, and cuisines.

The CIA & Industry Leadership: Health, Wellness, and Sustainability

Acknowledging the well-established link between diet and health and wellness, the CIA is actively engaged in developing strategies and solutions to increase the presence—and success—of healthy menu choices throughout the foodservice sector. While honoring the historical role of our industry to create special occasion foods and celebratory dining experiences, we also recognize that increasingly, Americans are turning to chefs and foodservice providers for healthy, everyday meals, snacks, and beverages. The CIA fosters collaboration between the foodservice industry, public health experts, academic researchers, policy makers, manufacturers, growers, and other suppliers in order to generate greater leadership in health and wellness both within foodservice and across our nation.

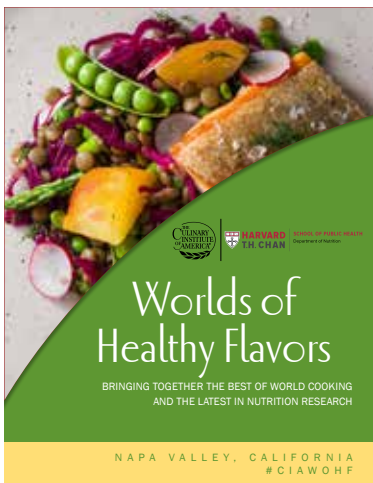
Our national, industry leadership conferences and other special initiatives, such as our Flavor, Quality, and American Menus Leadership Retreat, presented in partnership with UC Davis, explore important elements of sustainability while considering agricultural innovation and supply chain issues.





HARVARD T.H. CHAN SCHOOL OF PUBLIC HEALTH

During the past decade, the CIA has partnered with the Harvard T.H. Chan School of Public Health—Department of Nutrition and Harvard Medical School to stage a series of influential, health-focused leadership conferences and initiatives. Harvard T.H. Chan School of Public Health brings together dedicated experts from many disciplines to educate new generations of global health leaders and produce powerful ideas that improve the lives and health of people everywhere. As a community of leading scientists, educators, and students, we work together to take innovative ideas from the laboratory to people’s lives—not only making scientific breakthroughs, but also working to change individual behaviors, public policies, and health care practices. Each year, more than 400 faculty members at Harvard Chan School teach 1,000-plus full-time students from around the world and train thousands more through online and executive education courses. Founded in 1913 as the Harvard-MIT School of Health Officers, the School is recognized as America’s oldest professional training program in public health.



Through its CIA-Harvard Worlds of Healthy Flavors and other programs, the college has given the leadership of the volume foodservice sector direct unprecedented access to the world’s top nutrition scientists in order to gain insights on likely outcomes and future directions of diet and chronic disease research. When paired with the CIA’s deep knowledge of culinary and flavor strategy, these efforts have given participating corporations powerful tools to positively impact menu development in their national and global operations. This long-standing CIA-Harvard collaboration has been pivotal in driving trans fats out of most American foodservice kitchens, and in fostering other significant, health-promoting changes in our industry. (Helping to lead initiatives around sodium consumption and health, the CIA has also represented the foodservice industry on the Institute of Medicine’s national committee.)

Knowing the potential for leadership and change within the American community of physicians, nurses, dietitians, and other healthcare professionals, the CIA and Harvard Chan School annually host Healthy Kitchens, Healthy Lives®: Caring for our Patients and Ourselves. This ground-breaking Harvard CME-granting leadership conference “bridging nutrition science, health care, and the culinary arts” each year welcomes more than 400 physicians and senior-level healthcare professionals to the CIA’s California campus.

Take the Lead

Join the world's premier culinary and medical colleges in leading the future of foodservice. For more information, please contact:

GENERAL QUESTIONS**Strategic Initiatives Group**

si@culinary.edu

SPONSORSHIP**Shara Orem**

Director - Corporate Relations

707-967-2439

shara.orem@culinary.edu

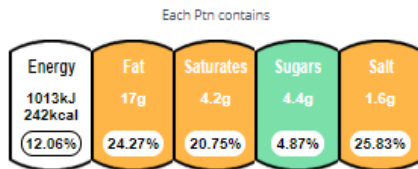
Patti Coleman

Director - Business Development

203-209-0066

patricia.coleman@culinary.edu

Caesar Salad (v)



of an adult's reference intake

Typical values (as sold) per 100g: Energy 382kJ / 91kcal

- ✓ Contains Cereals containing Gluten
- ✓ Contains Barley
- ✓ Contains Wheat

- ✓ Contains Eggs

- ✓ Contains Milk

- ✓ Contains Soya

Nutritional Information			
TYPICAL VALUES	Per 100g	Per Ptn	% RI* Per Ptn
Energy	382kJ 91kcal	1013kJ 242kcal	12.06%
Fat	6.4g	17g	24.27%
of which Saturates	1.6g	4.2g	20.75%
Carbohydrate	7g	17g	
of which Sugars	1.7g	4.4g	4.87%
Fibre	0g	1g	
Protein	2g	5g	
Salt	0.59g	1.6g	25.83%

* Reference Intake of an average adult (8400kJ / 2000kcal)

Carbon Footprint



The equivalent of driving a medium sized car (petrol) for 0.5 miles