CONCEPTIONAL©

2024

CONCEPTIONAL SUSTAINABILITY FOODSERVICE TREND REPORT

Introduction

Dear readers,

Conceptional is proud to publish our 5th Trend report overall and our 2nd Trend Report on Sustainability. In this second edition we will zoom in the impact of Sustainability for different key-sectors.

Sustainability has become an incredibly urgent matter within all industries. We are moving away from initiating awareness to solutions and start to understand that sustainability is not a trend but a transition.

For this reason we have created the Sustainable Food Route which we have deployed with several of our clients in integrating sustainability in both strategy as well as day-to-day operations. We have conducted several pivotal projects on airports, leisure parks, and for several foodservice brands and operators.

This report aims to provide a snapshot/zoom-in on the approach and best-practices within several key industry-segments. The ones highlighted in this report are travel (captive), leisure, (fast) casual, catering and shopping malls.

By providing you with these insights and relevant take-outs per sector we strife to provide you with tangible actions and inspiration to start your own journey in integrating F&B Sustainability in your business!

Let's travel together!

Enjoy your reading!

Team Sustainable Food Route
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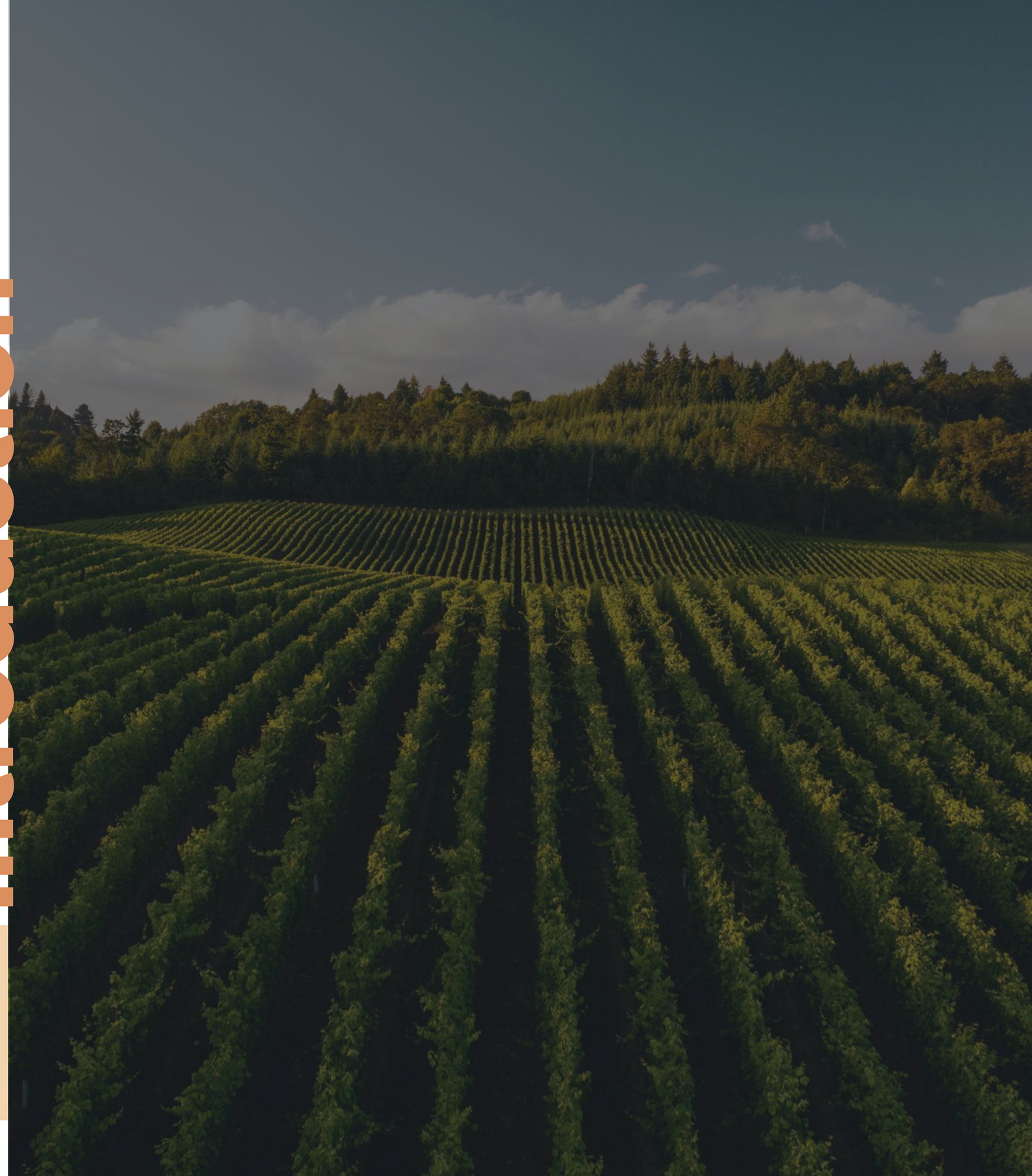


Our Services

We creative minds in F&B Strategy and Solutions.
We create Sustainable F&B concepts and places that understand and surprise you and your guests. We love food and everything that has to do with F&B challenges. Our services consist out of:

F&B Brand & Concept Development

- Brand positioning and strategy
- F&B Concept plan
- Kitchen design
- Experience design
- Menu development & presentation
- Concept/design/brand manual
- Searching & contracting the F&B operator

F&B Placemaking

- Feasibility study and quick scan
- F&B vision and strategy
- F&B masterplanning and space planning
- F&B concept-brand curator and leasing support
- Searching & contracting F&B operators

F&B Sustainable Food Route

- Awareness
- Quick scan
- Full measurement
- Vision
- Implementation

F&B Performance & Growth

- Quick scan operational framework
- Operational coaching
- F&B strategy
- F&B concept portfolio
- Roll out and new country entry plan
- Performance program *plan to win)
- Growth planning (plan to grow)

F&B Mergers & Acquisitions

- Quick scan
- F&B Vendor Due Diligence
- F&B Plan to win
- F&B Concept (re)development
- F&B Plan to grow

Click here for the website: Conceptional

1. How do we view sustainability?

In this report, we aim to provide you with key insights on the application and integration of F&B sustainability within different segments of the foodservice business.

The shift to sustainability is a massive global transition that goes beyond being a trend. It requires a holistic approach.
In short, all aspects of your business and eco-system will be affected by the global journey towards more sustainable ways of doing business that minimise our impact and ecological footprint. We will create a new paradigm for looking at our business beyond traditional drivers like commercial success, customer satisfaction, employee wellbeing and financial health. There is no choice other than to understand the impact of this transition for your business, embrace the change and integrate this from strategy to proposition into day-to-day operations.

Regulatory drivers for change are coming fast and in full force.
There are many compelling reasons to embark on this journey, including both intrinsic and extrinsic drivers. One of the largest extrinsic motivating factors are the laws and regulations which are set to roll-out in many areas across the globe, such as the Green-Deal Directives in the European Community (CSRD, CSDDD etc.). These packages of guidelines, directives and laws provide mandatory sustainability frameworks for conducting and organising your business.

Sustainability Themes
Sustainability is complex and encompasses various themes that go far beyond CO2e, including climate, people & animal wellbeing, biodiversity, and circularity. We aim to help you better understand these themes and the different aspects that influence your environmental, social, and governance (ESG) KPIs.

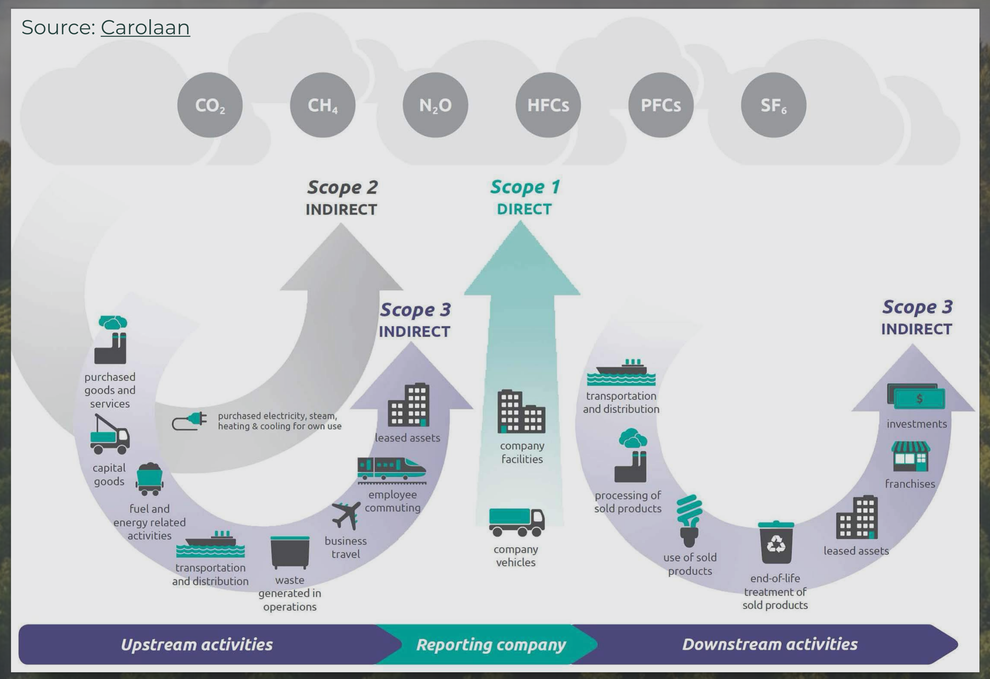
Sustainable Food Route
As F&B advisors, we understand the impact of sustainability on every aspect of your business. That is why we have developed the Sustainable Food Route (SFR) which is a holistic, pragmatic, and transparent approach to help foodservice businesses transition towards a sustainable future in a way that fits their brand, organisation and target audience. In each tailor-made SFR, we address the following areas focus areas:

- Food & Packaging
- Kitchen & Kitchen Process
- Interior & Design
- Policy & Organisation
- Communication & Branding

> **Understanding which dials you can turn gives clarity**
> Sustainable Food Route

Upcoming EU Legislation

Source: Carolaan

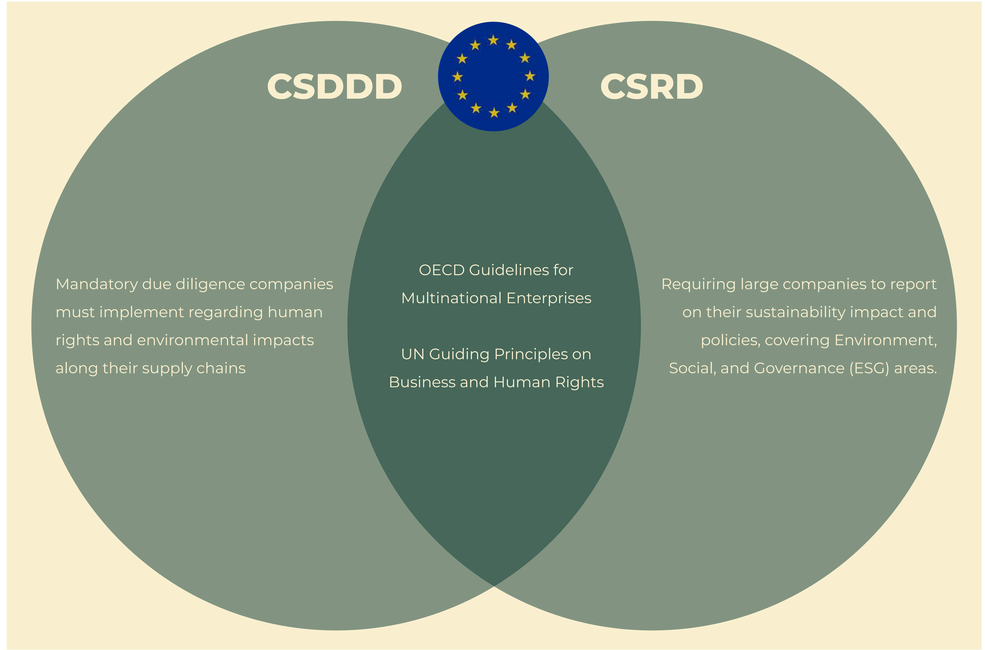


Transparent CSRD Reporting becomes "need to have"

Starting in 2024, the Corporate Sustainability Reporting Directive (CSRD) will require companies operating in many industries across the European Community to report on sustainability guidelines. Large public companies in the EU began this process this year. All companies will likely have to do this in the future, along with reporting their sustainability actions per the Corporate Sustainability Due Diligence Directive (CSDDD). Therefore, it is crucial to prepare for this by integrating the reporting and management of sustainability into daily business practices. This is relevant for even small businesses, as they will eventually be held to the same reporting standards under Scope 3 reporting (impact of full value chain).

The Corporate Sustainability Due Diligence Directive (CSDDD)

The directive establishes a corporate due diligence duty, which includes identifying, preventing, mitigating, and accounting for negative impacts on human rights and the environment in the company's own operations and value chains. This directive goes beyond the reporting standards as laid down in the CSRD-directive, but actually focusses on the need to act and mitigate any negative impact. Although currently slated to come into effect for larger organisations in 2028, due to its focus on the eco-system, it will impact all key actors and will become part of the DNA of every sector moving forward.



Based on EU Green Deal, European commission

The Sustainability themes

Theme 1: Climate

When discussing climate impact, the KPI's that can be influenced are the CO_2 emissions and energy usage, which can be affected by turning the right dials. For food & packaging these main dials are: Transition of Animal Protein to Plant-based and Local & Seasonal Sourcing.

Theme 2: People & Animal

Besides CO_2 impact, people and animal welfare is another crucial aspect of sustainability. Certifications serve as the main KPI for this area, which can be influenced by turning the following dials: Animal Welfare - Meat & fish and People & Wellness.

Theme 3: Biodiversity

Biodiversity is an often forgotten but crucial focus area of sustainability. The KPI's that can be influenced are water and land usage and certification. To address this issue, the dials that can be adjusted include Organic and High impact products.

Theme 4: Circularity

Implementing a circular production system is crucial in achieving sustainability goals. Touching upon waste management, circual design & construction and operational efficiency are crucial examples. In this report the focus will be on the dial: Packaging and Circular products.

1.

2.

3.

4.

How can we help?

Sustainable Food Route

A joint initiative of Conceptional & We Design Food.

01 Awareness	02 Quickscan	03 Full measurement Food/ SKU's	04 Vision, strategy and roadmap	05 Implementation
▸ Relevant Developments and Trends	▸ Food & Packaging	▸ Baseline measurement	▸ Vision / ambition P,Q,€	▸ Recipes
▸ Law and Regulations	▸ Kitchen & Kitchen Process	▸ Nutriscore	▸ Strategy (pillars)	▸ Sourcing
▸ Awareness	▸ Design & Interior	▸ Eco-score	▸ Screening current SKUs for new KPIs	▸ Packaging
	▸ Logistics & Transport	▸ CO2 emissions	▸ Priority compass, short term, long term	▸ Pricing (Business case)
	▸ Organisation & Policy	▸ Land use	▸ Sustainability Food Roadmap	▸ Waste / residual flows
	▸ Communication & Branding	▸ Water consumption		▸ Organisation and systems
				▸ Communication

Steps to take

1. Get overview on what is sustainability.
2. Make transparant where you are now.
3. What would be your ambition?
4. Set out a concrete roadmap.
5. Implement it pragmatically and transparently in to your concept, communication and processes.

Need help on your Sustainable Food Route?

As F&B Concept Developers, we are used to turning visions and creativity into reality. With this background and experience, we can develop and translate sustainable and business responsible F&B visions and strategies. We create the right balance between a positive impact on the planet, the needs of the target group and margin-saving or promoting solutions. This is translated pragmatically into processes, recipes and communication.

Conceptional and We Design Food are providing the right tools to make your Food & Beverage more sustainable. Together we make a step-by-step plan and create an appropriate 'Sustainable Food Roadmap',, so you can realistically and pragmatically navigate towards the sustainability goals of the future. Get moving and together we will start the journey!

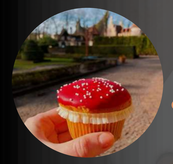
2. Sustainable food initiatives and trends within foodservice

In recent years, sustainability has become a key factor and driver in managing your business. It is not an option but a necessity to address this topic in the right way.

In this report, we will dive into 5 main sectors. Each chapter follows a consistent structure, initially describing observable phenomena, including key-trends, ongoing initiatives, and best practices.

2.1 Travel

High-traffic travel locations (airports & petrol) significantly influence sustainable food choices, impacting millions of travelers and contributing notably to the regional food and beverage industry's ecological footprint.



2.2 Leisure

In the leisure industry, including leisure and holiday parks, where visitors are enjoying a day out, companies must transition to sustainable food and beverage offerings.

2.3 Fast casual

A sector with high impact on sustainability due to its ability to innovate and be part of our daily routine.

2.4 Catering

Reaching millions of employees each and every day, this sector needs to balance daily affordability with increasing requirements and demand for sustainable food solutions.

2.5 Shoppingmalls

Like airports and railway stations, shopping malls are in absolute terms large hubs of food & beverage offering, providing a wide portfolio of concepts.

2.1 Travel

Captive high traffic locations play a pivotal role in the transition towards a sustainable food offering. Impacting millions of travellers each day, time and convenience are of the essence in these spaces, and habitual consumer patterns are more difficult to influence. Although food service at these locations has, in relative terms, a marginal impact on the total ecological footprint of the business, its absolute impact is significant in the context of the total (regional) food & beverage landscape.

In the next 2 sections, we will focus on the operations at airports and petrol stations, each with their own eco-system and challenges.

Airports

Sustainable F&B in the Airport industry

European airports attract nearly 4 million visitors daily (7). As large travel hubs with multiple F&B locations, they can make a substantial impact. Compared to other industries, aviation is not yet a frontrunner when it comes to sustainability in F&B. The primary focus has been on reducing their carbon footprint in Scopes 1 (emission of own operation) and 2 (energy consumption), which entails minimising greenhouse gas (GHG) emissions from aircraft, ground operations, and infrastructure. This accounts for 90% of their emissions.

Regarding F&B, currently, leading airports are implementing sustainable tenant policies that focus merely on energy use, cleaning products, waste management, and water usage. Examples of these policies can be found at, among others, Heathrow Airport, San Francisco Airport, and San Diego Airport. Despite these commendable initiatives, there is a critical gap in addressing Scope 3 emissions (impact of full value chain), particularly concerning food service. While these initiatives are noteworthy, there remains an essential aspect to be fully addressed. Current actions are omitting a holistic and systematic approach to food & beverage offerings regarding Scope 3. This includes measuring the CO_2e impact of F&B operations and ensuring sustainable sourcing practices. By integrating these factors into future tenant contracts, airports can proactively prepare for future sustainability regulations. Until that time, a joint voluntary approach among all key business partners is the best approach to making an immediate impact while also looking to the future.

Schiphol Airport in Amsterdam (61,7 million travellers in 2023) has started this ambitious, holistic, and joint route with its business partners. The goal is to realise the 2030 ambitions in line with the Paris Climate Accord. The approach is principle-led and proactive, with a focus on changing consumer behaviour at the airports. It aims to optimise and rebalance commercial and consumer needs and satisfaction, as well as minimise ecological impact.

How does this translate to trends in the F&B industry?

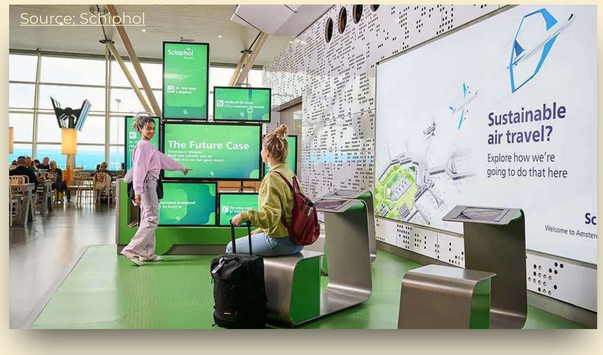
Circularity in the cross-eye of waste management

Many airports have adopted a zero-waste policy as one of their main focus points regarding F&B sustainability. They have implemented efficient waste management practices, including developing "no waste recipes", transforming food waste into new products for circularity, switching to reusable or compostable packaging, providing pre-ordering options, and partnering with organisations like TooGoodToGo or local donation initiatives (Adolfo Suarez Madrid-Barajas Airport). The first major step is obtaining insight on waste streams per location and operators, splitting upstream and downstream waste-streams, and optimising separation at source.

Integrating Sustainable (F&B) tenant policies and adapting concept portfolio strategies

Starting with voluntary cooperation with all business partners and suppliers, guidelines are developed that focus on all key aspects of business (i.e. reporting, product and sourcing, design & construction, waste and communication). This framework of guidelines provides a strong foundation for building the roadmaps towards achieving set objectives. Derived from this will be changes in product composition, product assortment and eventually concept portfolio.

Schiphol



Royal Schiphol Group aims to operate as one of the most sustainable airports by 2050 (1)

To meet this goal, Schiphol is actively collaborating with Conceptional's Sustainable Food Route to adjust their organisation and become more sustainable, step by step together with business partners at the airport. In this pragmatic and holistic route, a portfolio strategy and a new configuration of working structures with suppliers will be realised.

Københavns Lufthavne CPH

Copenhagen Airport takes a critical look at Scopes 2 and 3 emissions (2)

Copenhagen Airport utilises the EIC Greenhouse Emissions Tool to establish a baseline for its emissions. This tool facilitates the active monitoring of emissions and the tracking of reduction initiatives over the upcoming five years. Furthermore, the airport actively encourages employees to opt for vegetarian choices and take home daily leftovers by creating ready-made meals.

Source: Freight Cargo Site

Arket Café

Copenhagen Airport, Denmark

(35 locations in Europe)

Fitting in new aspirational concepts with sustainability fully integrated in their brand promise

Seasonal and vegetarian café dedicated to elevating the concept of everyday food. Emphasising natural flavours and ingredients, their menus showcase a selection of seasonal dishes, sweet treats, limited edition pastries and speciality coffee. Additionally they sell sustainable clothes. Striving to make an impact in the following areas: materials, suppliers, design, food, people, balance. (3)

Seasonal and vegetarian

Menu created by Head Chef Martin Berg, an early advocate of the New Nordic food movement

Themes: Climate, People & Animal and Biodiversity

Link to the website: Arket

Source: Standard Studio

Health food wall

Schiphol, The Netherlands

(14 locations in the Netherlands)

Fitting in convenience concepts with health & sustainability focus. High on handprint (visibility).

This concept features an intelligent fridge stocked solely with vegetarian and healthy options, providing fresh meals in seconds. Founded in 2018, Healthy Food Wall is now installed in various high-traffic locations such as hospitals, school or business canteens, and gyms. The concept aims to raise consumer awareness about collaborative efforts towards a sustainable future. (4)

Fastest option to get a healthy vegan meal

Aims to raise consumer awareness and increase their handprint by making them mindful of their choices

Themes: Climate, People & Animal and Biodiversity

Link to the website: Health Food Wall

Source: Postmates

The Plant

San Fransisco Airport, US

(2 locations in the US)

Fitting in new aspirational concepts with sustainability fully integrated in their brand promise

At The Plant Cafe Organic, sustainability is prioritized by sourcing organic ingredients from local farms. The menu, featuring contemporary California cuisine with Asian-inspired flavors, offers freshly made juices, salads, sandwiches, grain bowls, and organic desserts. Everything is made from scratch to ensure quality and freshness. (5)

Started 17 years ago and is still one of the only restaurants that is 100% committed to serving organic food

Won several sustainability awards for instance the Real Leaders Impact Award in 2023

Themes: Climate, People & Animal and Biodiversity

Link to the website: The Plant

Petrol

Sustainable F&B in the Petrol industry

Petrol stations are presently undergoing a significant transformation as a result of the energy transition from fossil fuel to more durable energy sources. This shift encompasses the emergence of novel energies and services, leading service stations to evolve into multifaceted hubs offering an array of amenities including cafés, leisure, and retail options alongside both conventional and alternative fuel options. As these spaces becomes destinations where drivers stop for longer periods, the role of F&B is also changing. Gas station shops, which once resembled supermarkets or quick snack stops, are now increasingly offering fresh food options. In the near future, more and more petrol stations will likely incorporate foodservice offerings into their proposition to cater to the changing needs and expectations of consumers and to maintain a level of relevance and attraction.

In the F&B landscape, petrol stations therefore play a, perhaps surprisingly, important role. Every day, millions of travellers are exposed to the foodservice offerings along highways and local roads and a significant portions of these encounters are converted into actual consumption of food and beverage. This also means that the ecological impact of these offerings is significant both in relative as well as absolute terms. Because this is a massive industry with a significant customer base, small changes enable the sector to lead in the transition towards a more sustainable food offering.

It is clear that petrol stations are running strong on snacking and guilty pleasures. Time is of the essence during a stop at a station, thus convenience and pricing are important factors driving consumer decisions. A laid back approach from petrol brands, operators and, F&B brands towards sustainability will not move the needle in the right direction. The petrol industry is one in which consumer patterns change slowly, if at all. A principle lead transition taking into account indulgence, snacking, pricing and convenience is necessary to make sure this sector is at the forefront of the sustainability transition.

How does this translate to trends in the F&B industry?

Transition from petrol stations to mobility hubs and food destinations

As described, gas stations are no longer just refuelling stops; they are evolving into destinations where drivers can take extended breaks and recharge. This means that the food offering needs to go beyond traditional snack offerings and should mirror the overall trends and developments within the foodservice market. Ideally, it would even go further in providing unique concepts and strong brands offerings to increase the stations' profile as a food destination - for instance, including a more fresh and sustainable offering.

More effective storytelling surrounding the adaptation to a meaningful economy

In line with the above trend, storytelling and distinctive food offerings have become increasingly important. This is especially true now that energy companies are ramping up their claims and narratives on driving a more sustainable future. In addition to the absolute impact of the foodservice offerings on petrol stations, storytelling also has a high visibility towards customers. This creates an ideal opportunity to showcase their vision and intent around sustainability sustainability claims and, in turn, help reshape their image.

(2 locations in the UK)

Source; Boutique retreats

Gloucester Services' mission is to bring proper food on the motorway (6)

Gloucester Services is a motorway services business which invites travellers to stop and enjoy a freshly cooked meal, relax in peaceful surroundings, and discover craft products made by members of the community, all while charging their vehicles. They seamlessly integrate with nature in every aspect - each building is thoughtfully designed to harmonise with the surrounding environment.

(+200 locations in the Benelux)

Source; Shell

Shell opens Shell Cafe, a place to recharge literally and figuratively (7)

In 2021 Shell Cafe launched with the goal of addressing the evolving needs of customers at gas stations. They offer a refreshed and updated assortment that features a wider selection of healthy and freshly made products. The company collaborated with de Vegetarische Slager and work with Too Good to Go. Additionally, they offer cow milk alternatives like soya, oat milk and coconut milk without supplementary costs.

Source: Assets global website

Gasoline Grill

Copenhagen, Denmark

(9 locations in Copenhagen)

Using the uniqueness of an ambitious sustainable offering as a driver for becoming a destination beyond regular customers

Gasoline Grill is a Danish burger concept with multiple locations in Copenhagen. In addition to gas stations, Gasoline Grill also has locations in Copenhagen Airport and Tivoli. Their menu features exclusively organic and fresh products. They also prioritise sourcing their ingredients as locally as possible, emphasising a commitment to sustainability and quality. (8)

Every ingredient is prepared daily from scratch in the morning, and they sell out every day, which guarantees freshness.

100% organic

Themes: Biodiversity

Link to the website: Gasoline Grill

2.2 Leisure

Sustainability is rarely the primary consideration for individuals when planning a visit to a leisure park or holiday destination. As such, excessive or overly detailed communication on sustainability efforts is not the best way to impact guest behaviour and enact change. Instead, integration can be subtle, such as replacing cow's milk in pastries at leisure parks or promoting local products in holiday parks.

This section zooms in on sustainable food service in leisure parks and holiday parks, highlighting industry trends and best practices for a comprehensive view.

Leisure Parks

Sustainable F&B in Leisure Parks

When visiting leisure parks, the majority of consumers tend to prioritise enjoyment over considerations of sustainability. Their primary objective is to fully engage in experiences rather than actively seeking the most sustainable or health-conscious options. Convenience and efficiency often dictate decision-making processes. Therefore, encouraging guests towards sustainable food choices can prove advantageous in achieving sustainability objectives. Subtle communication regarding environmental initiatives will likely have a more lasting effect than more in-your-face methods of storytelling.

We know that leisure parks are currently grappling with the notion that implementing sustainable practices in their F&B offerings may run counter to providing guests with a stress-free day out. However, making informed decisions in this area does not need to be inherently contradictory. Zoos in particular are at the forefront within leisure parks given their direct responsibility for animal welfare. For instance, Artis Zoo in The Netherlands does not serve any animal products, aligning with their commitment to animal care.

We see a great opportunity for theme parks to make use of street food outlets that focus on international cuisines that are traditionally high in plant-based products, such as those of India or Japan. Parks can also use their storytelling to subtly and seamlessly link sustainability with their brand profile. The Efteling, for instance, approaches sustainability from its origins as a nature park. Conceptional works closely with the Efteling to make its F&B more sustainable through the Sustainable Food Route.

How does this translate to trends in the F&B industry?

Implicit communication of vegan products

Leisure parks and zoos are increasingly shifting toward plant-based proteins in their food offerings, but they often choose not to highlight this change prominently. This approach is taken to avoid deterring visitors who might perceive the absence of traditional meat options as a lack of choice or quality in their meals.

Comfort food in a trendy way

Leisure parks attract large numbers of teenagers and young people who are often influenced by trends and seek out Instagrammable experiences. Recognising this, leisure parks leverage these trends by promoting comfort food in a trendy manner. A good example is the use of Karma Kebab (plant based) in menus.

Single product outlets offer opportunities

Leisure parks often feature multiple F&B outlets that focus solely on one product group. Therefore, it is easy to change single outlets towards plant based offerings and use the portfolio mix to meet different consumer needs across the property.

PortAventura WORLD

PortAventura prioritises sustainability in many ways (9)
Spain's PortAventura is committed to environmental responsibility through several initiatives. In terms of foodservice, the park has received a zero-waste certification from AENOR and distributes its food surplus to local social canteens. Additionally, the park uses education ro raise awareness regarding sustainability. The park also employs internationally recognised management systems aiming for continuous improvement.

Liseberg

Sustainability is a long-term and holistic commitment for Liseberg (10)
Liseberg, a leading Swedish leisure park, approaches sustainability holistically, including on F&B. This is evidenced by the new BREEAM-certified hotel, the ban on uncertified palm oil in all products, and the requirement of at least two vegetarian options per F&B outlet.

Source: Cloudfront

DHABA

Tivoli Gardens, Denmark

Utilize the opportunity to create a more balanced concept portfolio whilst remaining attractive for all target audiences

DHABA, situated at the foothill of Tivoli Gardens, offers authentic Indian cuisine. With a diverse menu featuring numerous vegan dishes, the restaurant adopts an effective strategy, particularly in theme park settings where guests may not actively prioritise sustainability. This approach avoids being overly pedantic while still promoting eco-friendly dining options. (11)

Using a cuisine that is sustainable by nature

Avoiding the trap of being overly pedantic about sustainability

Themes: Climate

Link to the website: Dhaba

De Serre

Dierenpark Artis ,The Netherlands

Blending nature and farming into a sustainable offerings as a true WOW-concept, expressing the core DNA of the Parc.

The Serre is located in a greenhouse in Dierenpark Artis. All dishes served are vegetarian and have a botanic theme. De Serre was the first fully vegetarian restaurant in Artis. Herbs from the surrounding garden are used by the chefs for dishes and drinks. (12)

- Menu with a 100% vegetarian botanic theme
- Herbs from the surrounding garden are used for dishes and drinks
- Themes: Climate, Biodiversity and People & Animal

Link to the website: De Serre

Source: Artis

Holiday Parks

Sustainable F&B in holiday parks

Guests' decision-making process for holiday parks often prioritises factors such as price and destination appeal over sustainability. While awareness of the environmental impact of travel is growing, travellers continue to focus on affordability and the allure of their chosen destination.

As a result, established holiday parks may find it challenging to make a complete turnaround due to issues with staffing, seasonality, trade area completion, value perception, and number & variety of locations. At present, their main priority on sustainability is aligning with future reporting rules by minimising energy usage and constructing properties that reduce impact and increase circularity. The emphasis on redeveloping foodservice has not yet become entrenches. This is attributed, in part, to the observation that guests themselves have not fully embraced sustainable food choices. In our observation, holiday parks are progressing slower than other sectors in terms of offering vegan and vegetarian options. They need to provide a full-range and democratic offering that takes into account the limited number of food outlets available on property. However as with other operators, the focus on affordability and profitability is derived from a more defensive attitude.

When zooming in on F&B's potential (increasing NPS, increasing capture, stortytelling, competitive distinctiveness), it is clear that the key to unlocking that potential lies in the integration of locally sourced, fresh products, focusing on craftsmanship, and providing a more sustainable (plant-based) offering. Guests often seek immersive experiences and a deeper connection with the surrounding environment. Offering locally sourced products in park restaurants aligns with this desire, providing guests with an authentic taste of the region while supporting the local economy. In addition, there is a fast-growing segment of guests who are specifically interested in sustainable travel, part of an emerging trend called ecotourism. Certain parks have been specifically tailored to cater to this demographic.

How does this translate to trends in the F&B industry?

Locally sourced products

Sourcing ingredients locally is a common practice in holiday parks. This provides guests with an opportunity to experience the authentic flavours and culture of the destination they are visiting.

Ecotourism

In recent years, with growing awareness of sustainability, ecotourism has emerged as the fastest-growing segment in tourism. It emphasises responsible travel practices and environmental conservation. Since the early 1990's the segment has been growing by 20%-34% per year, whilst overall tourism has been growing only by 4.3% per year. The demand for ecotourism is high and will continue to grow. (8)

Roompot.

(More than 200 locations in Europe)

Source: Roompot

Roompot aims to build new parks with a focus on sustainability, without compromising on comfort or quality (13)

Roompot GrandVoir is a prime example of a park placing sustainability at its core. The park is car-free, features solar panels, accommodations are made from sustainable materials, and there is significant green space in the park. In foodservice, the park is works exclusively with locally sourced products.

Landal GreenParks

(More than 120 locations in Europe)

Landal's surplus food serves as a valuable gift to others (14)

Landal GreenParks operates parks across 8 European countries and places a prominent focus on sustainability. In addition to implementing various sustainability initiatives and holding the prestigious Green Key Gold certificate, Landal GreenParks collaborates with Too Good To Go to combat food waste and contributes surplus food to food banks.

Source: Globetrender

EcoCamp Patagonia

Torres del Paine, Chile

(1 location in South America)

Sustainability into the core-DNA of the destination

EcoCamp Patagonia champions green tourism, with every aspect designed for environmental preservation. Practices include low-impact dome construction, renewable material furniture, composting toilets, and a biofiltration system. They use natural gas, biodegradable products, and implement waste separation. Organic waste benefits local farms, and a Reserve Collection Center manages other waste. The restaurant serves dishes made with ingredients from their own garden. (15)

Awarded as Green Leader by TripAdvisor and Award for Sustainable Luxury in Latin America

Local specialties made with self grown ingredients

Themes: Climate, People & Animal, Circularity and Biodiversity

Link to the website: EcoCamp Patagonia

Source:

Basecamp Eco-Resorts

Ijmuiden, The Netherlands

(3 locations in Europe)

Providing the sustainable experience by connecting to local nature and farmland

Basecamp Eco Resorts, established in 2019, presently runs two sites in the Netherlands and one in Italy, with additional locations planned across Europe, Asia, and Africa. Prioritising self-sufficiency, they serve homegrown food and collaborate closely with local suppliers. To combat waste, they host no food waste dinners and farmers markets for guests. Any remaining food waste is composted for their gardens. (16)

Supporting local suppliers and organising dinners to prevent food waste

Food grown from own garden

Themes: Climate, People & Animal, Biodiversity & Circularity

Link to the website: Basecamp Eco-Resorts

2.3 (Fast) Casual

In the (fast) casual sector, we encounter two distinct approaches to sustainability. On one hand, there are restaurants that have integrated sustainability into their brand strategy, catering specifically to environmentally conscious consumers. On the other hand, there are established chains with reputations to maintain, necessitating a more thoughtful and strategic approach to the implementation of sustainability practices.

This section zooms in on sustainable food service in (fast) casual restaurants, highlighting industry trends and best practices for a comprehensive view.

(Fast) Casual

Sustainable F&B in the (Fast) Casual industry

Among the casual and fast casual sector, we experience two distinct approaches to sustainability. One stream, typically represented by smaller restaurant groups or concepts, demonstrates a high level of sophistication in sustainability efforts, often incorporating them into their branding. Conversely, for another stream, integrating sustainability poses greater challenges due to existing reputations.

One segment of the industry caters specifically to sustainability-conscious consumers, prominently incorporating sustainability into their branding. Particularly, recently developed restaurant concepts are embracing this strategy as customers become more cognisant of the importance of sustainability and the impact of their choices regarding food. Vegitalian, an Italian focused chain with 4 locations in The Netherlands, established in 2020, takes this approach, distinguishing themselves through a vegetarian branding strategy. (9) Certain restaurants are adopting a more prominent approach by branding themselves with initiatives such as zero waste, ensuring full traceability of their products, and displaying the CO_2 impact next to menu items.

On the other hand, larger restaurant groups that have to hold up a reputation of their food offer face greater risks in eliminating high-impact products entirely, as it is possible that such modifications could lead to the distancing of a significant portion of their customer base. As a result, larger restaurant groups frequently incorporate vegetarian and vegan options in addition to the standard offer to avoid excluding specific demographic segments while also maintaining appeal to a broader customer base.

How does this translate to trends in the F&B industry?

Sustainability as a branding strategy

This approach is primarily adopted by newly established concepts or smaller restaurant groups, particularly targeting the growing demographic of sustainability-conscious customers. An example of this is Sweet Green with numerous locations in the US. (10)

Advancing sustainability while maintaining inclusivity among customer segments

This strategy is frequently embraced by established restaurant groups with existing reputations, aiming to retain their client base while adapting to sustainability guidelines and changing consumer preferences. Big Momma Group, with 24 locations across Europe, is an example of this. (11)

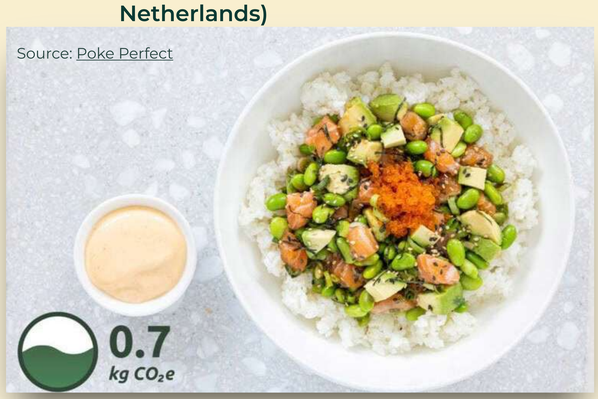
Making vegan or vegetarian the default choice

The shift towards vegetarian and vegan options as the default choice is driving sales of sustainable food. With most customers opting for the standard option, this encourages more sustainable dining habits by requiring an extra step on the part of customers to request meat specifically. Wagamama, with more than 190 locations across the world, is doing this (12).

(35 locations in The Netherlands)

Max Burgers annually measures its climate impact across all scopes, certified by EY (17)
Max Burgers is dedicated to minimising its environmental impact. In 2008, the brand pioneered the world's first climate-labeled menu, simplifying conscious choices for guests. It offers the widest range of low-impact burgers globally. From 2014 to 2021, sales of their 'green burgers' surged by 900%. Furthermore, they convert used oil into biofuel and actively plant trees to offset the environmental impact of their value chain.

(14 locations in The Netherlands)



Poké Perfect mentions CO2 impact for every dish on the menu (18)
Poké Perfect highlights the CO2 impact of each dish on their menu to raise awareness about the environmental consequences of menu choices. Utilising a scale with three distinct levels—low, mid, or high—they visually represent the carbon footprint, prompting consumers to reflect on their choices and their environmental impact.

Chipotle

3419 locations worldwide

Differentiating themselves by exclusively using real and pronounceable ingredients

Chipotle is a Mexican fast food chain founded in the United States. One of their core beliefs is that food has the power to transform the world, a vision they pursue by offering real, wholesome food. Chipotle is a pioneer among national restaurant brands, having set ambitious targets for sourcing local and organic produce. Moreover, they are the first to exclusively use responsibly raised meat, adhering to the highest standards of animal welfare.

Exclusively working with suppliers who share and champion their core values and act with honesty and integrity

Cultivating a better world by focusing on people, food & animals and environment

Themes: Climate, People & Animal and Biodiversity

Link to the website: Chipotle

Source: Visit Fresno County

Source: Uber eats

Kailash Parbat

72 locations worldwide

International cuisine with strong vegan roots

Kailash Parbat is a rapidly expanding vegetarian food chain with a global presence. Specializing in North Indian and Sindhi cuisine, the restaurant offers an exclusively vegetarian menu and even features a separate vegan menu. Indian cuisine inherently embodies sustainability due to its emphasis on vegetarian dishes. (21)

- Offering many vegan dishes
- 100% vegetarian
- Themes: Climate and People & Animal

Link to the website: Kailash Parbat

2.4 Catering

The catering industry leads the way in sustainability, largely due to corporate and public clients who emphasise sustainable and healthy food options. Motivation often goes beyond the reporting regulations and is more principle driven. Communication surrounding sustainability is notably transparent within this sector. In fact, many caterers leverage sustainability as a key brand value, ensuring they remain an attractive partner to their clients.

This section zooms in on sustainable food service in catering, highlighting industry trends and best practices for a comprehensive view.

Catering

Sustainable F&B in the Catering industry

The catering industry is at the forefront of sustainable food practices. Its primary client base, often comprised of corporate entities and the public sector, increasingly prioritises sustainability for reasons of alignment with role, principles & vision, and employability & employee wellbeing. Caterers are adapting to this demand by diversifying their menus to include healthier and environmentally friendly options. An important aspect of this evolution is the protein transition in which caterers actively try to reduce the amount of animal proteins they use. An approach often seen is caterers introducing hybrid products to maintain familiar flavours while aligning with more sustainable dietary choices.

More and more, caterers leverage sustainability as a key aspect of their brand identity, particularly in response to the rising demand for healthier and environmentally friendly food choices. They actively communicate their sustainability practices and initiatives to differentiate themselves in the market and appeal to companies seeking ethical catering options. Transparency regarding their actions is a central strategy aimed at encouraging businesses to select them based on their commitment to sustainability.

Due to the volume of their business, catering companies play a pivotal role in the food and beverage value chain by driving demand and innovation in a highly competitive market. More and more catering propositions are expected to (at least) mirror the market and align with their heterogeneous target audience and, in particular, the high demand younger generations (Gen Z and Millennials). By being more proactive and social in their offerings (instead of ticking the box on tenders), catering companies with a strong focus on sustainability are increasingly becoming healthier and more attractive to both employees and clients.

How does this translate to trends in the F&B industry?

Sustainability as differentiator

A growing number of caterers are prioritising sustainability as a fundamental aspect of their brand identity, positioning themselves as compelling partners for collaboration. This strategic shift reflects the broader trend of businesses assuming accountability for their Scope 3 emissions, emphasising sustainability, and streamlining their supply chains.

Transparency in communication

Unlike many other industries, the catering sector is notable for its transparent communication regarding sustainability practices. In addition to continuously improving their sustainable practices, it is equally vital for caterers to maintain transparency about these efforts to remain attractive partners in the future.

Hybrid products

Abrupt changes in the menu can pose risks, both in terms of taste and client perception of missing elements. Therefore, a gradual approach is often considered the most prudent course of action.

Hutten

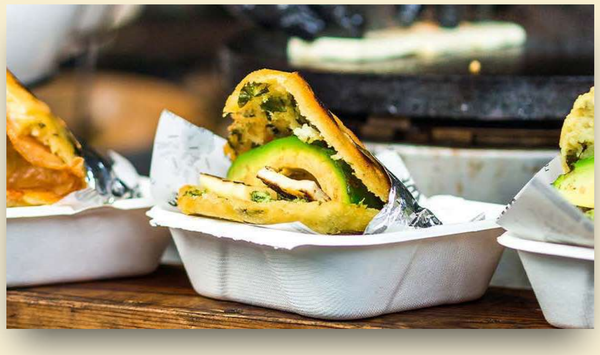
(More than 200 locations in The Netherlands)

Hutten is measuring proteins and executed a successful pilot on hybrid milk

To understand and reduce its impact on the environment, Hutten is measuring its proteins. Hutten also conducted a successful pilot on mixing cow milk with plant-based milk to preserve the flavour of traditional milk.

sodexo

(Locations in more than 50 countries)



Sodexo is measuring its upstream and downstream waste with WasteWatch (23)

Sodexo reduces food waste using advanced tracking programs like WasteWatch, which captures waste data to drive cultural and behavioral change. They measure both kitchen (upstream) and consumer (downstream) waste, promote plant-based menus, source local and responsibly produced ingredients, support fair trade, and use eco-friendly packaging. These comprehensive actions significantly advance sustainability in foodservice.

Source: Baxter Storey

Baxter storey

United Kingdom, 834 locations in 6 countries

Honest food as a key differentiator in growth strategy

Baxter Storey prioritizes sustainability as a core focus. They have launched a pioneering initiative called Second Nature, comprising 21 ambitious targets which are pursued through strategic partnerships with sustainable organizations such as Step Up, Diversity by Design, and Growing Talent. Another key objective involves waste reduction, achieved through collaboration with Waste Knot. Finally, Baxter Storey is committed to achieving net-zero emissions by 2040. (24)

Strongly focused on sustainability and partnerships

Creative with waste

Themes: Climate, People & Animal, Biodiversity and Circularity

Link to the website: Baxter Storey

Source: Zenya

Cirfood

Italy and The Netherlands, 144 locations in 3 countries

Utilizing the strength of world cuisine to drive meaningful food

Cirfood is using the Mediterranean cuisine as a compass that guarantees pure ingredients, a rich taste, local products and a healthy varation. The basis of their dishes consists of vegetables, nuts, seeds and fruit. Their Ecovadis platinum certificate places them among the top 1% of rated companies for sustainability. (25)

“Plantbased is our basis, sustainability is our nature”

80/20 ratio for plant based and animal protein

Themes: Climate and People & Animal

Link to the website: Cirfood

2.5 Shopping Malls

The primary emphasis of shopping malls regarding sustainability often centres on the design and construction of the building. Recently, there has been a growing recognition of the importance of integrating sustainability into tenant policies. This integration is becoming increasingly crucial, though existing malls must navigate the delicate balance of implementing changes without disrupting tenant relations or deterring new tenants.

This section zooms in on sustainable food service in shopping malls, highlighting industry trends and best practices for a comprehensive view.

Shopping Malls

Sustainable F&B in the shopping mall industry

Shopping centers in Europe attract millions of visitors per day, presenting an opportunity to make a substantial impact (13). Similar to airports, shopping malls operate under a landlord model, leasing spaces to tenants. Tenant policies increasingly prioritise sustainability, primarily focused on reducing energy use and waste. Although some malls are innovative in considering Scope 3 emissions (i.e. including products sold by tenants), to further sustainability goals, many have still progress to make. Integrating sustainable food service into existing shopping malls' tenant policies poses challenges, as it can demand higher investment from tenants, potentially affecting tenant attraction or retention. Gradual transitions are key, ensuring tenants understand sustainability as a necessity, not an extra effort.

Sustainability has become essential not only as a regulatory requirement but also as a pivotal element influencing investor relations. Sustainable tenants are crucial for investors because they contribute to the long-term viability and attractiveness of a property. Furthermore, as shopping malls are ‘in-control’ of the overall F&B offering and thus profile, they are expected formally and informally to take a clear position and responsibility in driving sustainability in their food offering.

Regarding foodservice, the situation in shopping malls differs from airports. F&B is a small but important part. Visitors in shopping malls might come specifically for the food, rather than it being a secondary need. Therefore, it is essential to give careful consideration to curating a diverse and well-balanced portfolio in shopping centers and maintain alignment with consumer profile and needs.

It is without doubt that in absolute terms (volume and ecological impact), shopping malls are a significant factor and mall owners must transition from simply providing space to providing a holistic and truthful experience.

How does this translate to trends in the F&B industry?

Rebalancing F&B concept portfolio

As shopping malls are targeted at a broad audience and thus multiple target groups, a balance between aspirational, proven, innovative, and commercially viable concepts is key. However, by defining a clear vision on F&B and sustainability, the concept mix is changing and minimal entrance levels (on approach towards sustainability of concepts) are increasing. This results in an improvement in the overall sustainability focus.

Sustainable tenant policies

The focus on sustainability is gaining prominence within tenant policies. While many policies primarily address energy consumption and waste reduction, certain shopping malls are now incorporating directives related to food and beverage concepts. Additionally, some are proactively seeking tenants who emphasise sustainability in their food offerings.

VIA OUTLETS
(11 locations in Europe)

Source: Via Outlets

Via Outlets has a ‘beyond sustainability’ approach which includes responsible consumption (26)
To make shopping a fit for the future, Via Outlets approaches sustainability with four pillars that cover Scopes 1 and 2. These pillars emphasise sustainable infrastructure, conscientious consumption practices, community resilience, and active stakeholder involvement. This is not yet translated to a clear sustainability strategy on F&B. Conceptional is poised to develop an F&B masterplan.

KLEPIERRE
(99 locations in Europe)

Source: Klépierre

Klépierre, world leader in its sector in sustainability, has renewed its CSR ambition (27)
Klépierre aims to establish the most sustainable commerce platform by 2030, facilitating eco-conscious consumption. With an 80% reduction in carbon footprint and a 40% decrease in energy consumption achieved over the past 10 years, their vision extends to achieving net zero carbon emissions within the next ten years. This is not yet translated to a clear sustainability strategy on F&B.

Source: Arch Daily

Green Pea

Turin, Italy (1 location)

Making a bold statement and go beyond the curve and demonstrate key learnings

Green Pea, located in Turin, Italy, stands as a shopping mall wholly dedicated to sustainability. Its eco-friendly building features sustainable energy floors, converting kinetic energy from footsteps into electricity. Spread across five floors are shops offering green clothing, cosmetics, and other sustainable products. Restaurant Casa Vicino also aligns with this vision utilising seasonal ingredients to showcase Italian culture. (28)

Totally dedicated to sustainability from design to retail to foodservice

Floors convert energy from footsteps

Themes: Climate & Circularity

Link to the website: Green Pea

Westfield Mall

76 locations worldwide

Differentiating by proactive communication on sustainability events

In constructing the Westfield Mall of the Netherlands, sustainability took center stage. Additionally, sustainability permeates the shops themselves, with many offering eco-friendly products or promoting sustainable behaviours. The mall has their “Green Heroes”, shops and restaurants that serve as inspiring examples that adopt sustainable practices and actively share them. Every bit of plastic, glass, paper, and kitchen waste is diligently recycled, underscoring the commitment to environmental responsibility. (30)

Sustainable building

100% of waste recycled

Themes: Climate

Link to the website: Westfield Mall of the Netherlands

3. Which steps to take?

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Step 1: Baseline measurement on Co2e and energy use

This step is applicable to all industries

Step 2: Vision and ambition + roadmap F&B

This step is applicable to all industries. Here, you define your vision and ambition and gain insights in your target group.

Step 3: Tenant guidelines in coordination with consignees

This step is particularly relevant in scenarios where proprietors lease out spaces.

Step 4: Starting with pilots and implementation of quick wins

- ***Airports:*** *It is crucial to distinguish between bespoke and branded concepts. In bespoke concepts, starting with pilot programs allows for experimental communication and testing of plant-based products.*
- ***Petrol:*** *Promote healthy food options to appeal to a wider audience and introduce pilot programs featuring plant-based alternatives.*
- ***Leisure:*** *Introduce outlets with plant-based products without explicit communication, while maintaining control by keeping one outlet unchanged. This offers a strategic approach.*
- ***Holiday parks:*** *Implement pilots featuring plant-based products to adapt to the increasing importance of sustainability and attract diverse target groups. Maintain control by offering these changes as options, ensuring flexibility while managing the transition effectively.*
- ***Fast casual:*** *Continuously test products and communication strategies regarding sustainability to ensure that changes are implemented at an appropriate pace.*
- ***Catering:*** *Continuously test products to ensure changes are implemented at an appropriate pace. Consider making products hybrid before transitioning fully to plant-based options.*
- ***Shopping malls:*** *It is crucial to distinguish between bespoke and branded concepts. In bespoke concepts, starting with pilot programs allows for experimental communication and testing of plant-based products.*

Step 5: Portfolio strategy

This step is applicable for all industries, having a clear understanding of your objective is crucial for success.

analyse.
amaze.
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Interested? Give us a call!

Do you also believe food deserves the best attention and care in your foodservice or leisure company? Do you think that your guests deserve the best attention and care? Looking for a reliable, experienced business partner to develop F&B concepts and places that work? We at Conceptional are keen to discuss options in more detail with you. Let us understand and surprise you and your guests!

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