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III. GREEN SHOOTS: DELICIOUS SIGNS OF CHANGE

In the past year, farm-to-table has been taken far beyond just restaurants to a wide range of institutions. In April, thanks to a \$50,000 grant from USDA, Farm to Institution New England (FINE) held its first Farm to Institution Summit at University of Massachusetts, Amherst. A public-private network across six states, FINE brought together hundreds of chefs, teachers, students, farmers, policy makers, fishermen, and other leaders and advocates to increase the amount of local and regional food served in K-12 schools, colleges and universities, and hospitals and clinics.

Anyone who has traveled by airplane would likely agree that the typical fare available in airports has long lagged behind the rest of the food movement. Healthy, fresh, culinary-driven options have become more common over time, but recently, in what *The New York Times* called “farm-to-terminal,” locally sourced products and ingredients have become more widespread. Rick Bayless’ restaurant Tortas Frontera at the Chicago O’Hare International Airport now buys its bacon and chorizo from a pig farmer in LaGrange, Indiana, a (relatively) local supplier 170 miles away. Demand is so high—with some passengers even placing orders for Tortas Frontera through a mobile app before they reach the airport—that the farmer had to expand his land and his workforce. Innovative business solutions like FarmLogix, which connects farmers to large institutions, have helped farmers overcome traditional barriers to supplying airports, which include getting through security and geographic and logistical challenges. O’Hare also boasts an aeroponic garden where airport restaurants can gather herbs and vegetables. The food offerings at

San Francisco International Airport’s Terminal 2 were dramatically improved several years ago, selling products from nearby farms and producers; now John F. Kennedy International Airport is selling produce grown in New York, as well as local products like honey. Michelin-starred chef Alain Ducasse has been hired by Newark Liberty International Airport to upgrade the fare in one of its terminals—only one of the many chefs involved in the airport’s extensive revamping of its food options, with a focus on freshness and nutrition.

It seemed that 2014 would go down as “The Year of Food Waste Awareness,” but then 2015 hit, and reducing food waste is now even more firmly mainstream. The National Restaurant Association ranked food waste ninth in its “What’s Hot in 2015” list of the top 20 food trends, which reflects survey results from over a thousand chefs. It shares a Top 10 list that includes locally sourced and sustainably produced meats, seafood and produce and the movement towards natural ingredients and away from processed foods.

In Europe and the U.S., initiatives are gaining traction that encourage the use of less than perfect foods that producers typically discard because they have no wholesale or retail demand for them. Some are true grassroots efforts, done in an almost subversive way; others offer the backing of a large organization or media platform. A Lisbon-based cooperative named Fruta Feia (“ugly fruit”) is bucking the traditional quality regulations set by the European Union for produce sold in supermarkets, which dictate strict parameters around size, color, and texture, and allow only the slightest imperfections.

Yet, Europe wastes 89 million tons of food a year, according to a study released in May 2014 by the Dutch and Swedish governments, who support efforts to reduce food waste. Since winning a \$20,000 entrepreneurship competition in late 2013, Fruta Feia has been growing. It now has hundreds of registered customers who pay a membership fee and receive weekly crates of otherwise neglected fruits and vegetables. Fruta Feia buys unwanted produce from farmers, at about half the price paid by supermarkets, and uses nontraditional distribution centers rather than retail stores. In the U.S., *Food & Wine* launched in March a #loveuglyfood campaign and invited its readers to post photos of their “crooked carrots, terrifying monkfish, and other not-so-beautiful foods” on various social media platforms, using the hashtag.

Other social media campaigns, such as that of endfoodwaste.org, ask consumers and businesses to pledge to eliminate food waste. According to the Natural Resources Defense Council, 40 percent of food produced in the U.S. is wasted. In the fall of 2014, the organization hosted the “Woodstock of Food Waste” in Berkeley and Oakland, California, gathering representatives from 16 states and seven countries to discuss the issue’s next frontier.

Chefs are also doing their part. A menu labeling system launched last year in Düsseldorf, Germany, called “All You Can’t Eat,” allows diners to pay the same price for a smaller-than-normal portion and have the restaurant send its saved food costs to a local food bank. In March, chef and author Dan Barber put his acclaimed New York City restaurant Blue Hill on hiatus in the name of addressing food waste: He transformed both the dining room and the menu into a pop-up restaurant called wastED, where every dish was about elevating scraps, overlooked ingredients, and byproducts and inefficiencies along the food chain. Imagine, for instance, biting into a burger made from a

juice company’s leftover vegetable pulp. (Any food remaining on diners’ plates went straight to the hens at Barber’s sister restaurant, Blue Hill at Stone Barns.) Barber’s larger goal is to bring about a cultural shift in how chefs and consumers think about feeding people. To that effect, he invited a different guest chef to join him in the kitchen each night and feature a dish on the menu; CIA alumni Grant Achatz, Andrew Carmellini, Enrique Olvera, Alex Raji, and Alex Stupak were among those who accepted the challenge.

On the investment side, crowd-funding platforms that specifically support food system change are emerging rapidly and strongly. One of them, Barnraiser, is an organization launched last spring by Eileen Gordon Chiarello, a Napa Valley-based entrepreneur and business partner with her husband, chef Michael Chiarello. Thanks to Barnraiser, a group in Nevada County, California—led in part by organic farmer Amigo Bob Cantisano, who helped start California Certified Organic Farmers (CCOF)—raised 167 percent of its goal, for a total of over \$33,000 to help revive heirloom fruit and nut trees from the Gold Rush era that are resistant to drought and pests. The Riverside Project, based in Charles Town, West Virginia, also exceeded its funding goal, surpassing \$17,000 to host a workshop to raise a timber frame pavilion this August. The structure will become a community hub offering retreats, trainings, and youth programs around topics such as permaculture and sustainable food production.

Increasing farm-to-consumer options and reducing food waste are indeed delicious signs of change, and these movements are growing alongside a handful of initiatives related to marketing and fund-raising that are equally encouraging.





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X. MARKETING PERSPECTIVES: THE SELLING OF DELICIOUS, HEALTHY, SUSTAINABLE FOOD CHOICES

For decades, “healthy, craveable” food was an oxymoron, and marketers were left scratching their heads about how to sell consumers on the idea. Today, the landscape could not be more different. Here we share the findings of a new survey of American consumers and foodservice operators and highlight the marketing strategies applied by two foodservice operations—one emerging chain, one university dining operation—that are seeing great success in selling diners on plant-forward dishes, and in the process making healthy, craveable food a redundancy.

DATASSENTIAL SURVEY FINDINGS

Earlier this year, the CIA partnered with Datassential to conduct a survey about the state of plant-forward dining in the foodservice industry. The aim was to uncover views from both consumers and foodservice operators about a variety of issues related to protein; concerns that operators have when it comes to making protein-related changes to their menus; and the ways that operators can both react to changing consumer demands and lead consumers to more plant-centric eating patterns. The survey was completed online by 1,013 consumers and 634 operators—menu decision-makers from restaurants ranging from QSR to upper casual, and from onsite operations ranging from K-12 to hospitals. Here’s what we learned.

The consensus among both consumers and operators (about three fourths of each group) is that the foodservice industry must play a role in addressing broad issues related to public health and the environment. Surprisingly, though, both groups place less emphasis on the foodservice industry’s role in addressing protein production and consumption than they do on its role in addressing broad health and environment issues. This signals a disconnect, since the single most significant contribution the foodservice industry can make toward environmental sustainability is to reduce red meat on menus, as part of a larger shift toward more plant-based and healthy dishes.

Food safety is far and away the most important issue for consumers, cited by 80 percent as an issue of concern. In contrast, only about half of consumers polled were concerned by the impact of animal protein production on the environment and current consumption levels of animal proteins in the U.S. Interestingly, consumers are more concerned than operators about antibiotics and steroids in animal proteins and dairy products. Maeve Webster, senior director at Datassential, who led the survey administration and analysis, notes: “Consumers appear more engaged in environmental and health-related issues, while operators are more concerned with business-oriented issues such as cost and consistent supply.” Operators must realize that the fact that consumers are concerned about health and environmental issues *makes* those business issues.

When it comes to consuming plant proteins, consumers are ahead of operators in many respects. “Operators have work to do in closing the gap between consumption and current away from home availability levels,” Webster reports. “This