

Plant-Based Transitions in the Foodservice Industry



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Plant-Based Transitions in the Foodservice Industry: Four Case Studies

Introduction

This research presents four in-depth case studies on plant-based protein transition across institutional foodservice sectors globally, with strategic applications to Thailand's food systems.

For the purposes of this research, the foodservice sector encompasses restaurants, hotels, hospitals, and corporate catering, which together represent a pivotal leverage point for the protein transition in Thailand. Collectively, these sectors serve millions of meals daily, directly shaping consumer dietary patterns and accounting for substantial shares of food-related emissions, waste, climate, and health outcomes, as well as economic value across the country.

The case studies examine four large organisations—**Accor Group (hospitality)**, **IKEA (foodservice/restaurant)**, **NYC Health + Hospitals (healthcare)**, and **Guckenheimer (corporate catering)**—and analyse how they have implemented plant-forward menu commitments of 25–55% while maintaining profitability, customer satisfaction, and operational efficiency.

Each case documents how organisations have moved beyond incremental change toward transformative food-system shifts while sustaining business performance and stakeholder satisfaction. Together, these cases outline replicable models, enabling conditions, and critical success factors that are applicable across diverse institutional contexts relevant to Thailand's foodservice sector.

To strengthen the findings and support critical analysis, the research employs a comparative case study methodology based on desktop research. Data were gathered from publicly available sustainability and ESG reports, news coverage, background literature, interview accounts, and industry publications, focusing on evidence related to specific success models, implementation pathways, impact metrics (climate, financial, social), and enabling conditions. ARE's internal peer-review process supported verification of evidence and testing of assumptions. Each case study follows a structured framework examining context, actions, and transformation, impacts across people-planet-profit dimensions, and replicability factors, with recent citations (where possible from 2024–2025) prioritised to reflect current practice and performance. Strategic insights in each case highlight direct applicability to each of Thailand's foodservice sectors, accounting for local culinary strengths, market conditions, regulatory dynamics, and emerging opportunities in the THB45 billion (USD1.43 billion) plant-based economy and wellness tourism markets.

The analysis shows direct relevance for hotel chains, restaurant operators, private hospitals, and corporate catering providers in Thailand. For the private sector, the case studies provide practical implementation roadmaps demonstrating how plant-forward

transitions can create self-sustaining economic models that generate sufficient returns to fund ongoing culinary innovation and operational improvement.

Crucially, these transitions are enabled by organisational commitment and supported by measurable targets, executive leadership, clear visions, strategic partnerships, staff training, and cultural change that embed plant-rich diets and sustainability into core operations.

For Thai policymakers, the findings imply potential regulatory and incentive frameworks to accelerate protein transition, while for civil society and research institutions the cases identify evidence gaps, research priorities, and partnership opportunities to scale plant-forward food systems across Thailand and the wider ASEAN region.

1. Accor Group: Leading Global Hospitality's Plant-Forward Transformation

Summary Snapshot

French-listed Accor Group is Europe's largest (and the world's sixth-biggest) hospitality company, operating more than 5,000 properties with 10,000 food and beverage venues across 110 countries, serving more than 200 million meals annually. The company has committed to making **50% of menu items plant-based by 2030** as part of its comprehensive **"Good Food Policy"** under the Responsible Food Model.

By November 2024, 72% of Accor hotels in the Americas already offered plant-based options, with subsidiary Novotel achieving 39% of hotels with at least 25% plant-based menus — one year ahead of their **2026 target**. The initiative supports **Accor's net-zero by 2050 goal** while delivering measurable food-waste reduction (60% target by 2030) and positioning the brand as a leader in sustainable luxury hospitality.

Accor operates hotel brands such as Ibis, Novotel, Pullman, Sofitel, and MGallery across Thailand, with few properties offering plant-based menu options, including Thai fusion dishes. With Thailand's THB45 billion (USD1.43 billion) plant-based market growing 10% annually and strong alignment with cultural traditions such as Buddhist vegetarianism, hotel F&B operations operating in Thailand can leverage their group's sustainability framework while capitalising on local culinary strength and rising consumer demand.

References:

- Europe's Largest Hospitality Group, Accor Group, Expands Plant-Based Menus Across 5,500 Hotels, Aims for 50% Vegan by 2030
- Accor Group Good Food Policy
- Novotel Celebrates One Year of Ocean Commitment and Sustainable Partnership with WWF
- Accor commits to net zero emissions by 2050
- Accor Responsible Food Model

Context: The Challenge

Accor faced growing expectations from multiple directions. As one of the world's largest hospitality operators, the company recognised that **food represented 17% of its carbon footprint and 50% of its water footprint** — making it impossible to achieve net-zero by 2050 without transforming food systems. The hospitality industry has been the subject of growing focus on ESG performance, driven by its significant environmental footprint and the rising expectations of customers who increasingly value environmentally responsible practices.

Around 30% of global food production is lost or wasted, creating both environmental and financial inefficiencies. Traditional hotel F&B operations rely heavily on meat-centric menus, high-carbon ingredients, and unsustainable sourcing practices. Hotel operators needed a **comprehensive strategy** that can balance guest satisfaction, culinary excellence, operational feasibility, and climate commitments across diverse markets, from high-end luxury brands such as Fairmont to budget properties like Ibis.

With global wellness tourism surging by more than 60%, **Thailand is emerging as a leading investment destination for health-focused travel and hospitality**. Programmes centred on wellness are becoming major business opportunities, driving demand for health-themed destinations such as wellness resorts, yoga retreats, and properties offering nutritious, plant-based meals. Luxury hotels are increasingly positioning themselves as partners in personal health and longevity. As a key pillar of Thailand's tourism-driven economy, the hotel and resort industry now faces rising consumer expectations for health-conscious and sustainable dining, especially in a country where **non-communicable diseases (NCDs) account for 75% of deaths** and awareness of climate impacts is growing rapidly.

Accor, as one of the largest international hotel operators in Thailand with more than 70 hotels and 16,000 rooms, is strategically positioned to drive industry transformation. Domestic Thai tourists comprise approximately 76–77% of total hotel guests nationwide, presenting opportunities to influence Thai consumer health outcomes alongside international guest expectations. Thailand's rapidly growing health and wellness tourism sector was valued at THB670 billion (USD21.4 billion) in 2025, and offers a compelling business case for plant-forward menu innovation that aligns hotel dining with Thailand's national health priorities and its growing brand as an international wellness destination.

References:

- Accor Group Good Food Policy
- Accor Circular Economy Policy November 2024
- Hotel Dive: How Accor's sustainability initiatives go beyond the hotel stay
- Thailand Healthcare Non-Communicable Diseases
- Thailand as a global wellness investment hub
- Accor Continues its Expansion across Asia
- Accor Accelerates Expansion in Thailand with Three Strategic Signings

- The Nation: Health tourism in Thailand surges to THB 670 billion, boosting wellness & spa sector towards global recognition

The Action/Transformation

Menu Engineering: Good Food Policy Framework

In November 2024, Accor formalised its "Good Food Policy" with seven key commitments by **2030**, notably its flagship goal: **50% of menu items plant-based**. This applies to all main meals (appetizers and mains) across more than 10,000 F&B venues globally. The strategy avoids mandating customer choice while maintaining meat options, which **shifts the default offering to plant-forward**, making sustainable eating accessible to all guests rather than a niche luxury.

Recognising this opportunity, Accor has already begun implementing plant-based initiatives across its Thailand portfolio. Subsidiary brand Novotel pioneered implementation with its "**Plant-Forward**" programme that targets 25% plant-based menus by 2026 across all 600 hotels. By 2025, 39% of Novotel properties had achieved this target, demonstrating feasibility at scale.

In Thailand, properties including Ibis Bangkok IMPACT have launched dedicated plant-based concepts like the Groove and Greens Café, offering Thai fusion dishes such as plant-based Tom Yam "meatballs," pineapple fried rice, Massaman curry with tofu, and vegan larb.

To build culinary capability, Accor Thailand strengthened its commitment in 2025 through collaboration with Humane World for Animals, delivering chef training programmes across multiple properties (detailed further in the *Staff Training* section). These initiatives align with Accor Group's broader global targets to boost plant-forward meals and promote sustainability in hospitality, catering to both health-conscious local consumers and international guests seeking sustainable options.

Menu development emphasises **low-carbon recipes, seasonal and local sourcing** (20+ local products per hotel by 2030), and innovation guided by leading culinary institutes. Through its "Good Food Policy", Accor prioritises whole-food ingredients and responsible sourcing of high-quality, local, and organic products that align with nutritional quality and cultural authenticity.

References:

- Bangkok luxury hotel goes greener with expanded plant-based menus
- Accor Group Good Food Policy
- Novotel Celebrates One Year of Ocean Commitment and Sustainable Partnership with WWF
- More Plants, Better Seafood: Novotel Debuts Climate-Conscious Menus at All 600 Hotels
- Ibis Bangkok IMPACT Groove and Greens plant-based cafe

- Accor Responsible Food Model

Procurement & Supply Chain Partnerships

Accor partners with NGOs, startups, and agricultural producers to transform sourcing:

- **Plant-based protein suppliers:** Partnerships with N.OVO, NotCo (Latin America), and Zrou (China) provide regional plant-based alternatives tailored to local tastes.
- **Organic and regenerative agriculture:** More than 1,000 hotels cultivate urban vegetable gardens producing herbs, vegetables, and fruits on site, reducing food miles and supporting circular economies. Flagship examples include Mövenpick Resort Aswan's 30,000 sqm organic farm and Fairmont Singapore's aquaponics farm, which produces 1,300kg vegetables and 200kg fish annually.
- **Responsible sourcing commitments:** 100% responsible coffee, tea, and cocoa by 2030; cage-free eggs globally by 2025, though Asia-Pacific lags behind other regions with only 53% (excluding China) of all hotels compliant as of end-2024 and threatened seafood species removed from menus.
- **Local sourcing:** Hotels prioritise seasonal, local ingredients, with targets of at least 20 local products by 2030.

For Thailand, this model could leverage the country's agricultural strengths. Hotels in Thailand can source more local plant proteins from the country's emerging production infrastructure, support Thai farmers practicing regenerative agriculture, with more urban gardens featuring Thai herbs for authentic flavour.

References:

- Accor Responsible Food Model
- Accor Planet 21: Sustainable Hospitality & Community Action
- Vegconomist: Europe's Largest Hospitality Group, Accor Group, Expands Plant-Based Menus Across 5,500 Hotels, Aims for 50% Vegan by 2030
- Promoting Responsible Sourcing – Accor Group
- Accor: Act on animal welfare by offering eggs from cage-free hens

Staff Training

Accor has deployed comprehensive training programmes to embed plant-based expertise across its operations:

- **Culinary training:** Globally, Accor has introduced programmes dedicated to plant-based cooking techniques, low-carbon recipe development, and food waste reduction to upskill chefs worldwide. In Thailand, Accor strengthened this commitment in 2025 through collaboration with Humane World for Animals, delivering chef training programmes across multiple properties including Ibis Bangkok IMPACT, Novotel Bangkok IMPACT, Four Points by Sheraton, and Mövenpick BDMS Wellness Resort Bangkok.

Through these programmes, chefs received comprehensive guidance on incorporating plant-based ingredients into recipes, building skills for plant-forward menu innovation and resulting in a diverse array of dishes that balance culinary excellence with environmental responsibility. These initiatives align with Accor Group's broader global targets to boost plant-forward meals and promote sustainability in hospitality, catering to both health-conscious local consumers and international guests seeking sustainable options.

- **E-learning modules:** Three-module series covering food waste measurement, reduction strategies, and operational best practices, deployed across 5,500+ properties.
- **Chef-led innovation:** Leading culinary institutes guide menu development, ensuring plant-based dishes meet luxury hospitality standards for taste, presentation, and cultural relevance.

References:

- Bangkok luxury hotel goes greener with expanded plant-based menus
- Fostering a Sustainable Food Model
- Novotel Celebrates One Year of Ocean Commitment and Sustainable Partnership with WWF

Guest Engagement

Accor actively engages guests in its sustainability journey by trying to make plant-rich and low-carbon dining both visible and attractive throughout its properties. The group's initiatives, which fall under its "Responsible Food Model", include:

- **Low-Carbon Menus:** Accor has committed to offering 50% vegetarian or plant-based dishes in its menus by 2030 and focuses on developing low-carbon recipes.
- **Carbon Footprint Labelling:** The company has piloted carbon footprint labelling initiatives that indicate the carbon impact of dishes on menus, often developed in collaboration with partners like the Swedish start-up Klimato. In Thailand, Mövenpick BDMS Wellness Resort Bangkok partnered with Klimato to introduce carbon labels on all menus, indicating Low, Medium, or High for each dish. International examples demonstrate the effectiveness of this approach. In Poland, Novotel implemented similar carbon impact scoring, and 64% of customers changed their meal choice to a lower-carbon option when provided with the carbon impact score on the menu. This system empowers guests with knowledge about their food's impact and guides them toward more responsible choices.
- **Guest Engagement & Menu Design:** In addition to carbon labelling, Accor uses clear menu icons and in-restaurant displays to highlight plant-based and environmentally friendly choices, emphasising pleasure, wellness, and positive choice rather than using restrictive language.

References:

- More Plants, Better Seafood: Novotel Debuts Climate-Conscious Menus at All 600 Hotels
- Novotel Celebrates One Year of Ocean Commitment and Sustainable Partnership with WWF
- Accor: Fostering a Sustainable Food Model
- Accor: Elevating Food & Beverage
- Accor: Engaging Travellers to Embrace More Sustainable Behaviours
- Wasserstrom: The Low Carbon Menu is Served
- Meetings & Conventions Asia: Bangkok resort goes carbon conscious for meetings and meals
- Klimato: Carbon Labels That Turn Climate Data Into Customer Action

Impact: People, Planet, Profit

People

- **Guest access and inclusivity:** 72% of Accor hotels in the Americas offer plant-based options, with 39% of Novotel properties achieving at least 25% plant-based menus. The group's strategy is explicitly framed around meeting the demands of wellness-focused and younger travellers. Plant-based menus accommodate diverse dietary needs (vegan, vegetarian, flexitarian, religious), enhancing inclusivity.
- **Staff engagement:** More than 1,000 hotels operate urban gardens, creating staff involvement in sustainable food systems and fostering community. Training programmes reached thousands of chefs and staff including in Thailand, enhancing culinary skills and sustainability understanding.
- **Health outcomes:** Plant-rich menus support guest wellness goals, aligning with rising health consciousness.

With rising numbers of Thai people affected by NCDs, hotels in the country could offer more plant-based Thai cuisine in line with wellness and longevity ambitions, attracting both international wellness travelers and health-conscious local guests.

Planet

- **Carbon footprint reduction:** As noted earlier, food represents 17% of Accor group's total carbon footprint. Shifting to 50% plant-based menus by 2030 will measurably reduce Scope 3 emissions, supporting net-zero by 2050 targets. Low-carbon recipes and plant-based meals will help to lower greenhouse gas footprints.
- **Water and biodiversity:** Food accounts for 50% of Accor's water footprint. Plant-based menus require significantly less water than meat production. Urban gardens (1,227 across properties) enhance biodiversity, pollinator habitats, and local ecosystems.

As Thailand pursues Nationally Determined Contribution commitments under the Paris Agreement, hotels in Thailand that offer plant-based menus can directly support national climate goals. Thai hotels achieving 50% plant-based by 2030 could market "climate-positive stays", attracting eco-conscious international tourists and positioning themselves for sustainable hotel certifications that are aligned with many of Thailand's sustainable tourism standards or green certifications. This can appeal to eco-conscious international tourists while contributing to Thailand's Carbon Neutrality 2050 targets.

For instance, hotels in Thailand could set a target to achieve 50% plant-based menus by 2030, positioning for certifications such as TAT STAR (Tourism Authority of Thailand's Sustainable Tourism Acceleration Rating) where climate action is a mandatory criterion, Thailand's GSTC-recognised Green Hotel Plus, which requires carbon measurement and reduction, or international standards like EarthCheck and Green Key — all of which reward measurable emissions reductions. In particular, adopting plant-based menus directly supports compliance with STG 13 (Climate Action in Tourism), a mandatory criterion under Thailand's national STAR rating system, which targets 70% industry participation by 2026.

Profit/Business Value

- **Cost efficiencies:** While no public data specifies profit margins from sourcing plant-based ingredients for Accor, studies show that hotels prioritising eco-friendly practices enhance both guest experience and overall profitability. When implemented effectively, plant-based ingredients can cost less than premium meats, improving food margins. In addition, on-site urban gardens can help lower procurement costs by supplying fresh herbs and produce directly to hotel kitchens.
- **Brand differentiation:** Accor's sustainability initiatives may support differentiation in the market, particularly among guests who value environmentally responsible hospitality. Some of its luxury brands such as Fairmont, Sofitel, and Pullman highlight ESG performance as part of their positioning, contributing to competitive advantage.
- **ESG and investor confidence:** Accor is publicly listed on Euronext Paris and subject to investor scrutiny. Strong ESG performance can support favourable financial outcomes, specifically in stock valuation, access to green bonds, and sustainable finance. Accor has set a clear, ambitious goal to have 100% of its hotels third-party eco-certified by the end of 2026. This strategy would enhance its credibility.
- **Market expansion:** Plant-based commitments open new customer segments (vegans, vegetarians, flexitarians, wellness travelers, Millennial and Gen Z consumers) without alienating traditional guests (meat options remain).
- **Risk mitigation:** Diversifying protein sources towards more plant-based would reduce exposure to supply chain risks such as meat price fluctuations, disease-related disruptions, and regulatory changes.

Thailand's hospitality market is highly competitive. Hotels in Thailand that adopt more plant-based menus can differentiate from competitors while tapping the THB45 billion plant-based market. Cost savings from local sourcing (including Thai plant-based proteins) can improve profitability. ESG positioning would attract international tourists that prioritise sustainable accommodations and support Thai government tourism sustainability initiatives.

References:

- Accor Responsible Food Model
- Europe's Largest Hospitality Group, Accor Group, Expands Plant-Based Menus Across 5,500 Hotels
- Accor Circular Economy Policy November 2024
- Accor Integrated Report 2023
- Accor collaborates with key sustainable certification programs
- Accor Boosting Attractivity with Sustainable Certifications

What Made It Work

Clear, Time-Bound Commitments with Executive Leadership

Accor's November 2024 "Good Food Policy" formalised its 50% plant-based target for 2030, creating clear accountability, attracting media attention, and driving time-sensitive implementation across its operations. Chief Sustainability Officer Brune Poirson (former French Minister of Ecological Transition and Inclusive Transition) provided high-level credibility and drove implementation across 5,500 properties. Time-bound targets—25% by 2026 for Novotel and 50% globally by 2030 — set clear ambitions while remaining achievable.

Thai hotel chains such as Central Hotels, Minor Hotels, or Dusit Thani could make similar public commitments aligned with Thailand's NCD-reduction strategies, attracting media coverage and policy support.

References:

- Accor Group Good Food Policy
- Hotel Dive: How Accor's sustainability initiatives go beyond the hotel stay

Brand Segmentation & Flexibility

Accor's wide range of brands, from luxury to budget, allows each property to adopt plant-based menus in a way that fits its identity. Luxury brands such as Fairmont and Sofitel emphasise gourmet cuisine and premium ingredients to ensure plant-based options align with a luxury dining experience while mid-scale/economy brands like Ibis and Novotel focus on simple and affordable options. This approach makes plant-based adoption practical across different markets and guest groups.

Thailand's hospitality landscape includes luxury resorts, business hotels, and budget properties, which would make this tailored approach effective. Luxury resorts can offer premium plant-based versions of Thai cuisine, while budget hotels could feature familiar Thai street food in plant-forward formats. This would help encourage broader acceptance and implementation across the sector.

References:

- Accor: Our Hotel Brands

Partnerships with NGOs and Start-Ups

Accor collaborates with Humane World For Animal, Mercy for Animals, EscolhaVeg in Brazil, Lever China, WWF France, Too Good To Go, Winnow Solutions, and Orbisk. These partners provide technical expertise, external credibility, and practical tools that help Accor improve its plant-based offerings and reduce food waste. Many of these collaborations are offered at low or no cost, making it easier for Accor to scale improvements across its global portfolio.

Thai hotels could similarly partner more with World Animal Protection Thailand, ARE, ProVeg, Thai universities and government agencies for technical support, research validation, and co-branding opportunities.

References:

- Vegconomist: Europe's Largest Hospitality Group, Accor Group, Expands Plant-Based Menus Across 5,500 Hotels, Aims for 50% Vegan by 2030
- Novotel WWF France partnership

Cultural Localisation

Accor adapts its plant-based menus to match local food culture in each region. In Bangkok, Ibis hotels serve Thai plant-based dishes such as larb, tom yum, and pineapple fried rice. Properties in Greater China work with local brands like Zrou, while hotels in Latin America collaborate with NotCo to create familiar, local options. This approach strengthens authenticity and guest acceptance.

Thai hotels are well-positioned for this strategy because Thai cuisine already includes a wide range of naturally plant-based dishes that appeal to both local diners and international visitors.

References:

- Ibis Bangkok plant-based Thai menu
- Europe's Largest Hospitality Group, Accor Group, Expands Plant-Based Menus Across 5,500 Hotels, Aims for 50% Vegan by 2030

Conclusion & Key Learnings

Accor Group's plant-forward commitment and implementation demonstrates that hospitality operators can successfully embed sustainability into core operations while maintaining guest satisfaction and financial performance. The case study reveals many success factors and applications for Thailand:

1. Comprehensive policy frameworks drive execution: The seven key commitments in Accor's formalised "Good Food Policy" (November 2024) creates clarity and accountability across its 5,500 properties.

- 50% plant-based menus
- Responsible coffee/tea/chocolate
- Organic or agro-ecological breakfast items
- Low-impact meat selection training
- Food carbon footprint measurement
- Local and seasonal sourcing
- No endangered seafood; responsible sourcing

2. Targets matter: Accor's clear, time-bound goals like the 50% plant-based by 2030, 25% by 2026, and 60% food-waste reduction by 2030 create serious accountability. Broad statements of support without measurable targets do not carry the same credibility.

3. Progress is gradual but measurable: Novotel achieved 25% plant-based (vs. 25% target by 2026) at 39% of hotels, demonstrating achievable milestones. Hotels in Thailand should set realistic interim targets (e.g., 20-30% by 2027) instead of ad hoc goals that may risk abandonment.

4. Cultural adaptation is non-negotiable: Ibis Bangkok's Thai plant-based menu (tom yum, larb, pineapple fried rice) shows localisation success. Hotel properties in Thailand should leverage culinary uniqueness as much as possible.

5. No isolated cost-benefit data published: Accor has not released detailed per-meal profitability comparisons for plant-based vs. meat dishes. However, Accor hotels implementing AI-powered food-waste monitoring have achieved documented annual savings ranging from AUD32,000 (USD21,210) in Darwin to €31,000 (USD36,338) at the Marriott in Lisbon, demonstrating that a USD10,000–50,000 savings estimate is achievable across diverse markets. Combined with urban garden cost savings, these waste reduction initiatives help contribute to positive economics, though the direct relationship between reducing food waste and enabling plant-based menu economics remains to be empirically validated. Hotels operating in Thailand should track and publish financial data to strengthen business cases, and explore how integrating prevention of meat waste may also enable a transition to more plant-based offerings.

6. Brand differentiation matters: Increasingly, luxury travellers are prioritising sustainability as a decision factor. Thai hotels can justify premium pricing for sustainable offerings rather than competing solely on cost.

Accor's approach to plant-forward dining is highly relevant for Thailand's hotel industry. As demonstrated at Ibis Bangkok IMPACT, this model fits well with Thailand's food culture, which is naturally rich in vegetables, has a significant young population, and is influenced by Buddhist vegetarian traditions. There is also strong potential for other Thai hotel groups to follow this model. Hotel chains such as Centara, Minor, Dusit Thani, and Anantara could set practical targets, such as making 25–30 percent of their menus plant-based within a clear timeline. Thailand has the advantage of rising local production of plant-based proteins, which is supported by the government policy to transform the country into a global plant-based protein production hub, which can help keep costs competitive.

Consumer demand also points in this direction. Many Thai guests choose plant-based options for health reasons, and the country's high rate of diet-related diseases creates an opportunity for hotels to offer healthier meals. Thai culinary skills, especially in stir-fried cooking, curries, and vegetable dishes provide a natural foundation for high-quality plant-based menus.

Hotels that move toward plant-forward dining can also strengthen their ESG profile. This may later open doors to sustainable/green finance and government-related programmes, and appeal to climate-conscious international travellers. This aligns with Thailand's broader goals to position the country as a leading hub for "Future Food" in the ASEAN region, which also includes alternative proteins like plant-based.

References:

- Ibis Bangkok plant-based Thai menu
- Travel Pulse: Virtuoso Survey Finds Growing Number of Luxury Travelers Prioritize Sustainability
- The Nation: Thailand Bets Big on 'Future Food' with New 500 Billion Baht Goal
- Winnow: Save Thousands on Food Waste Tech: NSW Hotels Can Now Claim 50% Rebates — But Funds Are Limited
- How Lisbon Marriott Cut Food Waste by 50% While Boosting Guest Satisfaction

Key Facts

Accor Group's plant-forward commitment and implementation demonstrates that hospitality operators can successfully embed sustainability into core operations while maintaining guest satisfaction and financial performance. The case study reveals many success factors and applications for Thailand.

Item	Details
Location	<p>Global: 110 countries, 5,500+ properties, 10,000+ F&B venues;</p> <p>Thailand: Bangkok (Sofitel, Pullman, Novotel, Ibis, Mercure, Movenpick), Phuket, Chiang Mai and other resort destinations</p>
Sector	<p>Hospitality / Hotels & Resorts (luxury to budget)</p> <p>Thailand hotel market composition (2024)¹:</p> <ul style="list-style-type: none"> Thai-owned independent hotels: 53.4% market share Chain hotels (Thai brands + international brands combined): 46.6%, with most international-branded hotels being Thai-owned assets managed by foreign hotel management companies <p>Note: Within the chain hotel segment, the market comprises both Thai domestic chains (Centara, Minor Hotels, Dusit, ONYX, Asset World Corporation etc) and international chains (Accor, Marriott, IHG, Hilton, Radisson etc). Specific breakdown between Thai vs. international chain market share is not publicly disclosed, but leading international chains (Accor, Marriott, IHG) are recognised as holding significant market share alongside major Thai operators.²</p>
Commitment / Target	<p>Time-bound targets: 50% of menu items plant-based by 2030 (global); Novotel 25% by 2026 (39% achieved as of 2025);</p> <p>Sales target: No specific revenue/sales % target published</p>
Key Partners	<p>Humane World For Animals, Mercy for Animals, EscolhaVeg (Brazil), Lever China, WWF France, Too Good To Go, Winnow, Orbisk, N.OVO, NotCo, Zrou, leading culinary institutes</p>

¹ Mordor Intelligence: Thailand Hospitality Industry Size & Share Analysis - Growth Trends & Forecasts (2025 - 2030) and Hospitality Industry In Thailand Market Demand and Consumption Trends: Outlook 2025-2033

² Legal structure: international brands operate via management contracts with Thai owners

Item	Details
Contact / Source	Accor Group official website; Accor Group Good Food Policy; Accor Responsible Food Model

2. IKEA Food Services: Affordable Plant-Based Food at Scale

Summary Snapshot

Swedish listed IKEA, the world's largest furniture retailer and one of the globe's biggest food providers, committed in November 2020 to **making 50% of restaurant main meals plant-based by 2025**. Serving more than 680 million customers annually across 62 markets, IKEA leveraged its iconic Swedish meatball platform to introduce the HUVUDROLL plant ball in 2020 — a pea protein-based alternative with a 96% lower carbon footprint.

By 2024, plant-based meals represented 36% of main offerings (up from 30% in 2023) and total IKEA sales for 2025 reached EUR44.6 billion (USD52.3 billion), covering products, food and services, with an overall steady volume growth over the past three years. The initiative achieved **price parity**, meaning plant-based balls cost the same or less than meatballs globally. This directly addresses affordability barriers while delivering measurable climate and business benefits.

Thailand represents both a success story and growth opportunity. IKEA's global commitment to make **50% of restaurant main meals plant-based by 2025** was successfully implemented in Thailand by May 2025. IKEA Thailand operates three locations (Bangna, Bang Yai, Emsphere) where plant balls are already priced 7.8% cheaper than meatballs (119 THB vs 129 THB), and the menu includes Thai fusion plant-based dishes like Plant-Based Cheese Tonkatsu and Spicy Plant-Based Crispy Pork ("Larb"). This demonstrates that IKEA's model works in Thai markets and offers a template for Thai restaurant chains to replicate across the country's THB 45 billion plant-based food sector.

References:

- IKEA 50% plant-based restaurant commitment by 2025
- IKEA Sustainability Report FY24
- IKEA Thailand Swedish Restaurant
- IKEA Promotes Sustainable Food As Plant-Based Diets Rise
- IKEA Year In Review

Context: The Challenge

IKEA's Swedish meatball is widely consumed by customers worldwide but carries a significant carbon footprint as the company's largest food-related emissions source.

Selling more than 1 billion meatballs annually across 62 markets, IKEA recognised that food represented both a climate challenge and an opportunity to influence consumer behaviour on an unprecedented scale. Research commissioned by IKEA revealed that **75% of consumers wanted to reduce their environmental impact**, and many meat-eaters would switch to plant-based alternatives if they tasted good, cost the same, and had equivalent nutritional value.

Externally, IKEA's climate commitments required **halving value chain emissions by 2030** (vs. 2016 baseline) and achieving **net-zero by 2050**. Food ingredients accounted for 4% of IKEA's total climate footprint (0.81 million tonnes CO₂eq in FY24), a modest but strategically significant portion. The UN Food Systems Summit 2021 and rising stakeholder expectations for corporate climate action intensified pressure for transformation.

In the Thai context, IKEA's challenge mirrors barriers facing the country's restaurants: balancing consumer demand for familiar, affordable dishes with sustainability imperatives and health trends. Thailand's foodservice market, valued at USD35.4 billion in 2025, faces similar dynamics, where growing health consciousness driven by the burden of NCDs (which account for 75% of deaths), climate awareness, and a THB45 billion plant-based market expanding 10% annually. IKEA Thailand's three Bangkok locations operate in a market where one in three consumers are increasing plant-based intake, yet price sensitivity remains the primary barrier. IKEA's strategy to achieve price parity while maintaining quality and familiarity offers a feasible solution for Thai restaurant chains to overcome these primary pain points.

References:

- Climate Report FY24
- The climate footprint across the IKEA value chain
- IKEA 50% plant-based restaurant commitment by 2025
- Green Queen: IKEA pledges 50% plant-based by 2025
- IKEA is making plant-based food more affordable and accessible for the many
- Thailand foodservice market analysis
- In Thailand, Plant-Based Meat is Getting Cheaper & Selling Faster
- Thailand Emerging as Leader for Plant-based Food

The Action/Transformation

Menu Engineering: Plant Ball Development

IKEA spent years developing the HUVUDROLL plant ball and launched it in Europe and the U.S. in 2020. Made from yellow pea protein, oats, potatoes, onion, and apple, the plant ball replicates the taste, texture, and juiciness of IKEA's traditional pork-and-beef meatball. The plant ball is served identically with mashed potatoes, cream sauce, lingonberry jam, and vegetables, ensuring the dining experience remains familiar. The traditional meatball stayed on menus, positioning plant balls as an additional choice rather than a replacement, avoiding customer backlash.

By 2024, IKEA expanded offerings to include a hybrid patty (PANNBIFF: 50% plant-based, 50% minced beef) in Sweden, a plant-based hot dog launched in new markets, and affordable plant-rich rice and vegetable dishes. In Thailand around July 2024 and into early 2025, IKEA adapted the menu to include Thai fusion plant-based dishes: Plant-Based Cheese Tonkatsu (vegan katsu curry) and Spicy Plant-Based Crispy Pork styled as

Larb (a northern Thai minced meat salad). These culturally tailored options demonstrate IKEA's ability to localise plant-based offerings while maintaining global operational standards.

The 50% target applies to main meal offerings, allowing IKEA to expand customer choice without mandating consumption. By 2024, 36% of main meals were plant-based, with 80% non-red meat — demonstrating steady progress toward the 2025 goal.

References:

- Climate Report FY24
- Fast Company: IKEA plant ball carbon footprint
- IKEA Sustainability and Climate Reports FY24
- BK Magazine: IKEA Thai-Swedish fusion menu

Price Parity Strategy: Making Plant-Based Accessible

In October 2023, IKEA announced price reductions on plant-based products to achieve parity with meat equivalents. Plant balls are now priced the **same or lower than meatballs globally**. In Thailand, this translates to THB119 (USD3.81) for eight plant balls compared with THB129 for eight meatballs, representing a 7.8% price advantage for the plant-based option. Frozen plant balls for home cooking cost THB259/500g in Thailand. In the U.S., restaurant plant ball plates and frozen bags both cost USD5.99, the same as meatballs.

This pricing strategy directly addresses one of the key barriers for Thai consumers: the perceived high cost of plant-based food. Research shows that despite strong interest, Thai consumers cite price as the primary obstacle to adoption. By making plant-based options cheaper or equivalent, IKEA addresses this issue and positions sustainability as accessible to many more people as a core IKEA value proposition.

This strategy demonstrates IKEA's use of more resource-efficient raw materials than beef and pork, which would enable the company to sustain margins while lowering prices. The business model is directly replicable by Thai restaurants sourcing local plant proteins (such as soy or mushrooms) from Thailand's growing domestic production infrastructure.

References:

- IKEA is making plant-based food more affordable and accessible for the many
- IKEA frozen plant balls Thailand 259 THB
- USDA: Plant-Based Food and Beverage Market in Thailand

Supply Chain and Innovation Partnerships

IKEA developed its own plant ball recipes in-house but also invests in external innovation. In 2024, IKEA invested in a Toronto-based startup developing plant-rich ingredients, demonstrating commitment to advancing the broader plant-based ecosystem. All IKEA Food products meet the IKEA Balanced Meal Norm, a science-based nutrition framework managing calories, saturated fats, sugars, salt, and fibre to ensure healthfulness.

For Thailand, this partnership model offers opportunities for Thai foodservice companies to collaborate with local plant-based protein producers (supported by government initiatives) and universities researching plant-based food innovation. Thailand's ambition to become a global plant-based protein hub certainly aligns with IKEA's innovation-driven approach.

References:

- Climate Report FY24
- IKEA Debuts Food Innovation Program For Startups To Meet 50% Plant-Based Meal Targeted startups
- IKEA restaurant meals: 50% plant-based by 2025
- NXPO: Development Opportunities For Thailand's Alternative Protein Industry

Customer Engagement and Education

IKEA promotes and markets its plant-based meals as delicious, affordable, and sustainable food that helps reduce climate impact. The plant ball is positioned as an option for meat lovers, appealing to flexitarians and mainstream consumers beyond the vegan niche. This inclusive framing drove the plant + veggie ball market share from 14% in 2021 to 17% in 2022, proving that plant-based can succeed as a mainstream choice when positioned effectively.

In Thailand, IKEA's approach resonates culturally. Thai consumers should respond better to gentle nudges that emphasise health and taste rather than confrontational environmental messaging. Thai restaurant chains could adopt similar framing by positioning plant-based dishes as delicious, familiar, and better value rather than morally restrictive.

References:

- IKEA Promotes Sustainable Food As Plant-Based Diets Rise
- IKEA Expands Plant-Based Range to Cut Emissions, Aims to "Remove or Replace Dairy"

Impact: People, Planet, Profit

People

Plant ball adoption has grown significantly. Canada sold 7.2 million in 2025, up from 2.9 million in 2024, demonstrating rapid consumer acceptance. Plant+veggie balls captured 17% of HUVUDROLL range sales by 2022, up from 14% in FY21. IKEA Food meets the Balanced Meal Norm for healthier eating, supporting customers' health goals while maintaining taste and satisfaction. The inclusive "for meat lovers" positioning makes plant-based accessible to mainstream consumers, not just vegans, which is critical for scaling impact. In Thailand, IKEA's culturally adapted menu (plant-based larb, tonkatsu) demonstrates respect for local tastes while introducing sustainable options and building customer trust and loyalty.

Planet

The plant ball has a climate footprint 96% lower than the traditional meatball. If 20% of IKEA's 1 billion annual meatball sales were converted to plant balls, it would cut the food business's carbon footprint by 8%.

By 2024, IKEA's total climate footprint fell 28% from the 2016 baseline to 21.3 million tonnes CO₂eq. Food ingredient emissions decreased by 6% between FY23-FY24 (from 0.86 to 0.81 million tonnes CO₂eq), contributing measurably to overall progress. While food represents only 4% of IKEA's total footprint, the company has set an ambitious target to reduce food-related emissions by at least 50% by FY30 compared to FY16, one of IKEA's most aggressive category-specific reduction targets. IKEA achieved 36% of

main meals plant-based in 2024 (vs. 30% in 2023), demonstrating continued progress toward the 50% goal. IKEA Thailand's lower plant ball prices demonstrate that sustainability doesn't require a cost premium. Thai restaurant chains replicating IKEA's model could achieve similar emissions reductions while supporting Thailand's climate goals.

Profit

IKEA Food sales in Canada grew 41% cumulatively from FY22 to FY25 – from CAD123 million to 143 million (USD89.6 million to 104.1 million) – with plant balls a significant driver. Globally, IKEA serves 680 million+ customers annually, generating massive reach for plant-based offerings. Price parity means plant balls don't necessarily sacrifice margins, with ingredient costs for pea protein and oats possibly lower than beef/pork, which in turn improves profitability. The plant+veggie ball captured 17% of HUVUDROLL sales in 2022, demonstrating that plant-based is not jeopardising meatball sales but expanding the overall market and attracting new customer segments. Brand equity benefits are substantial: IKEA's sustainability leadership attracts younger, values-driven consumers and generates positive media coverage. IKEA Thailand's pricing of plant balls as cheaper than meatballs proves this is financially viable in Thai markets. Local sourcing of Thai plant proteins (soy, mushroom, jackfruit) could reduce costs and support domestic agriculture, creating a compelling Thai ESG narrative.

References:

- Climate Report FY24
- The climate footprint across the IKEA value chain
- IKEA Canada Summary Report FY25
- IKEA Canada Summary Report FY24
- IKEA Canada Summary Report FY23
- IKEA Promotes Sustainable Food As Plant-Based Diets Rise
- IKEA Sustainability Report FY24
- IKEA Canada Summary Report 2024
- Thailand foodservice market analysis
- Thailand's Plant-Based Market Reaches THB45 Billion, Aims to Be Global Kitchen

What Made It Work

Clear, Public Commitment with Measurable Targets

IKEA's November 2020 announcement of a target to make 50% of main meals plant-based by 2025 created accountability, media attention, and internal alignment. Publishing annual progress reports (30% in 2023, 36% in 2024) demonstrated transparency and built stakeholder trust. The time-bound target created a sense of urgency and momentum, while still leaving room for learning and adaptation along the way. Thai restaurant groups could make similar public commitments, such as 30% plant-based menus by 2027, to align with Thailand's National Strategic Plan for NCDs or government plant-based protein development goals. Public disclosure would attract media coverage, NGO partnerships, and potential government support or sustainable finance access.

Price Parity IKEA's October 2023 decision to price plant-based options at or below meat equivalents tackled the primary consumer barrier. This reflects IKEA's core value that sustainability shouldn't be a luxury. Presumably, lower ingredient costs for plant proteins enable this strategy without sacrificing margins.

To overcome similar barriers in Thailand, restaurant groups sourcing local plant proteins could achieve similar price parity or advantages, making sustainability accessible to middle-income customers rather than only urban consumers. This would support in expanding market reach and social impact.

References:

- IKEA making plant-based affordable
- IKEA Thailand plant ball 119 THB vs meatball 129 THB
- Challenges and opportunities for Thai plant-based food businesses

Cultural Localisation - Taste and Familiarity

IKEA invested years of development into a plant ball that replicates the meatball experience in terms of taste, texture, serving style, and dining ritual. This strategy avoids the common mistake of plant-based foods being perceived as inferior or niche. In this case, the plant ball is served with lingonberry jam and mashed potatoes, maintaining a beloved IKEA dining tradition.

Thai cuisine is naturally plant-rich, providing a strong foundation and a natural advantage. Thai restaurants could create plant-based versions of beloved dishes (vegan pad thai, mushroom green curry, tofu tom yum) that match or exceed meat-based versions in flavour and satisfaction. Leveraging traditional Thai culinary techniques with modern plant proteins would ensure authenticity and quality, while meeting sustainability and health goals.

IKEA has also adapted its plant-based menus to local contexts. Along with its tonkatsu and larb offerings, IKEA also created Thai-Swedish fusion dishes at its Emsphere branch, including northern style noodles ('khao soi' with Swedish meatballs).

Conclusion & Key Learnings

IKEA's plant-based food transformation globally and locally demonstrates that restaurant operations can successfully shift toward sustainable menus while maintaining customer satisfaction and financial performance. The case study reveals critical success factors and direct applications for Thailand's restaurant sector.

1. **Price parity is unlocked:** IKEA's plant ball pricing removes the primary consumer barrier. Thai restaurants must prioritise affordability to achieve mass adoption.
2. **Taste and familiarity:** The plant ball replicates the meatball experience, not reinventing it. Thai restaurants can follow this model with their own plant-based versions of famous dishes.
3. **Gradual progress:** IKEA set a 50% target for 2025 but reports annual progress transparently (e.g. 36% in 2024). Thai restaurant chains should similarly set realistic interim targets and iterate based on customer feedback.
4. **Cultural adaptation is essential:** IKEA Thailand has successfully localized its plant-based offerings. Thai restaurants have a culinary advantage as Thai cuisine is already plant-rich and culturally familiar.
5. **Carbon impact is substantial:** The 96% emissions reduction per plant ball shows that food system transformation can contribute to climate goals. Thai restaurant chains adopting similar changes could support Thailand's climate goal ambitions.

6. **No cost-benefit data isolation, but strong overall performance:** IKEA hasn't published detailed per-meal profitability comparisons, but its food operations have experienced moderate sales growth (8%) since 2016, suggesting plant-based offerings are financially viable.

Key Facts

Item	Details
Location	Global: 62 markets, 680M+ annual customers; Thailand: 3 locations (Bangna, Bang Yai, Emsphere/Sukhumvit) serving plant-based menu with Thai fusion dishes as well as plant balls
Sector	Furniture Retail with Foodservice (One of world's largest restaurant chains by customer volume) including casual dining, QSR chains, food courts
Commitment/ Target	50% of main meals plant-based by 2025 (2024: 36% achieved)
Key Partners	Plant-based ingredient suppliers (pea protein, oats), Toronto startup for innovation, nutrition science partners for Balanced Meal Norm.
Contact/Source	IKEA Global; IKEA Thailand; Ingka Group; IKEA Canada

3. NYC Health + Hospitals: Leading U.S. Public Sector Shift with Plant-Based Default Menus

Summary Snapshot

NYC Health + Hospitals (New York City Health and Hospital Corporation, or "HHC") is a not-for-profit public benefit corporation created by New York State Legislature. It's the largest municipal healthcare system in the U.S., serving approximately 3 million meals annually across 11 public hospitals. Since launching its plant-based default programme in March 2022, the system has served more than 2 million plant-based meals to inpatients, with more than 900,000 served in 2024 alone. The initiative has delivered exceptional results; **more than 90% patient satisfaction, cumulative cost savings exceeding USD1.3 million through 2024, a 36% reduction in food-related carbon emissions, and more than 50% of eligible patients consistently choosing plant-based options.**

NYC Health + Hospitals' plant-based initiative addresses a dual challenge faced by healthcare systems globally: reducing the climate impact of hospital operations while improving patient health outcomes. Healthcare contributes approximately 4-5% of global greenhouse gas emissions, with food procurement representing a significant controllable emissions source within hospital operations. NYC's 36% reduction in food-related emissions demonstrates that hospital food systems can deliver measurable climate benefits while maintaining high patient satisfaction and generating cost savings.

As a government-subsidised not-for-profit entity, NYC Health + Hospitals' motivations include reducing municipal healthcare costs and addressing the long-term burden of chronic disease on public health budgets. These are drivers that differ from profit-oriented private hospitals. However, the documented economic, operational, and patient satisfaction outcomes would remain useful and relevant to Thailand's healthcare sector, regardless of ownership model.

This dual imperative – climate mitigation and NCD prevention – is relevant to Thailand. NCDs cause approximately 75% of deaths in Thailand annually, while the government has prioritised plant-based protein development as a strategic economic opportunity with the potential to generate THB1.3 trillion baht (USD41.7 billion) in value and more than 1 million jobs. Thailand's healthcare industry contributes 4.4% of global greenhouse gas emissions, in line with the global healthcare sector average, with total healthcare emissions of approximately 13.36 million tonnes CO₂eq annually, ranking 24th globally among 68 nations studied.

Private hospitals dominate Thailand's healthcare landscape, with major listed groups including Bangkok Dusit Medical Services (BDMS), Bumrungrad Hospital, Bangkok Chain Hospital, and Thonburi Healthcare Group (THG). These groups have set aggressive climate targets: THG has a goal of net-zero by 2030, and BDMS by 2050, creating strong institutional incentives to address all emissions sources. Plant-based menu transitions could contribute measurably to these commitments while simultaneously addressing Thailand's NCD issue.

References:

- How Hospital Food Can Fuel Sustainability Efforts at NYC Health + Hospitals
- NYC hospitals' plant-based meal milestone
- Halving Meat Consumption Can Cut Thailand's Emissions by 80% & Add \$37B to the Economy
- Thailand Healthcare Non-Communicable Diseases
- About NYC Health + Hospitals
- Thailand's healthcare sector takes steps towards sustainability
- Thailand Health Sector Emissions Fact Sheet

Context: The Challenge

NYC Health + Hospitals faces rising rates of diet-related chronic diseases, such as diabetes and hypertension, placing enormous pressure on hospitals and city health resources. The city's ambitious climate targets and sustainability commitments require drastic emissions reductions, including sourcing and serving lower-impact foods within all public institutions. Traditional hospital menus, centred on animal products, perpetuate rather than reverse these conditions.

NYC Health + Hospitals recognised that its food programme had to address these dual pressures: reduce the burden of chronic illness and help meet citywide environmental benchmarks. The system also responded to public demand for healthier, culturally

resonant meals, while maintaining compliance with municipal health standards and ESG frameworks.

As part of New York City's commitment to reduce greenhouse gas emissions 80% by 2050, municipal agencies including NYC Health + Hospitals are also required to identify emissions reduction opportunities across its operations. By shifting to plant-based defaults, NYC H+H could address both its climate mandate and its public health mission simultaneously. The health system served more than 1.2 million plant-based meals between March 2022 and 2024, achieving a 36% reduction in food-related carbon emissions and cost savings of USD0.59 per meal.

Ex-Mayor Eric Adams, who personally reversed his type 2 diabetes through a plant-based diet, championed the initiative as part of his administration's HealthyNYC plan and the city's net-zero commitment. The business rationale was compelling: **leverage public procurement to simultaneously improve patient health outcomes, reduce hospital re-admissions, cut operational costs, and meet ESG and carbon reduction targets**. This model could provide relevant, though not fully comparable, insights for Thai hospitals that operate centralised foodservice systems and face similar challenges in managing NCDs. Thai private hospitals would likely tailor this model to their specific drivers, such as profitability, brand image, and compliance needs, as their motivations differ from municipal cost reduction.

Thailand's rapidly growing private healthcare sector faces a similar dual challenge: managing rising NCD burdens while meeting aggressive net-zero commitments. With healthcare contributing 13.36 million tonnes CO₂eq annually to Thailand's emissions, private hospital groups like BDMS and THG would have strong business imperatives to explore low-carbon food procurement strategies that help them meet their net-zero goals. Unlike NYC H+H's public health mandate, Thai private hospitals would also be more motivated by profitability optimisation, ESG compliance for SET-listed companies, medical tourism competitiveness, and brand differentiation through creating a stronger business case when combined with the cost savings demonstrated in the NYC model.

References:

- NYC Climate Dashboard
- NYC Health + Hospitals Details Climate Resilience Plan, Building on Existing Efforts and Commitment
- Thailand's healthcare sector takes steps towards sustainability
- Thailand Health Sector Emissions Fact Sheet
- Mayor Adams Completes Citywide Expansion of Lifestyle Medicine Program
- NYC Health + Hospitals Cuts Annual Anesthesia-Related Carbon Emissions
- CNA: New York pushes plant-based diets

The Action/Transformation

Menu Engineering & Behavioural Defaults

NYC Health + Hospitals adopted a "**plant-based by default**" model, making plant-based meals the primary chef's recommendation for all inpatient lunches and dinners. The strategy avoided polarising language like "vegan" or "vegetarian", instead positioning dishes as high-quality, culturally resonant "chef's choice" options. More than 20 diverse recipes including Pad Thai, Spanish Vegetable Paella, Sancocho, and Southern Black-Eyed Pea Casserole were developed to reflect New York's multicultural patient population.

This approach could also be replicated for Thailand, where cuisine is naturally plant-rich and culturally diverse. Thai hospitals could leverage familiar dishes to create appealing defaults without requiring dramatic culinary shifts. This approach avoids the perception of restriction that has limited plant-based adoption in Thailand, where consumer surveys show a majority interest but persistent barriers related to taste, price, and availability. Meat-based options remained available upon request, preserving patient choice while leveraging behavioural science to encourage healthier selections.

References:

- How NYC hospitals made plant-based the default
- NYC Health + Hospitals Now Serving Culturally Diverse Plant-Based Meals
- Mayor Adams, NYC H+H CEO Katz Announce Successful Rollout and Expansion of Plant-Based Meals as Default Option for Patients in NYC Public Hospitals
- Challenge and opportunities for Thai plant-based food business
- Plant-Based Diet-Shift Initiative Case Studies: New York City

Procurement & Supply Chain Partnerships

The system partnered with foodservice catering firm **Sodexo** and nonprofit organisation **Greener by Default** to redesign menus, streamline procurement, and train culinary teams. The menu emphasised whole, minimally processed plant ingredients rather than expensive meat alternatives, a critical pathway in achieving cost parity and savings. All meals are prepared from scratch at the Brooklyn Culinary Center, ensuring quality control and cultural authenticity.

For Thailand, this model offers relevant learnings, though implementation pathways differ. Sodexo also operates in Thailand, but there has been limited public communication regarding their plant-based initiatives with hospital programmes or other corporate clients in its Thai operations. The expansion of the Sodexo-Greener by Default partnership to 400 hospitals (131 currently participating, targeting 400 by 2026) applies only to U.S. hospitals under Sodexo management. These include both municipal, non-profit and private hospital clients, as Sodexo serves diverse healthcare systems across the U.S.

Thai foodservice providers could collaborate with CSO organisations to offer hospitals technical support and reduce implementation challenges. Engaging Sodexo Thailand and

similar corporate catering providers to explore opportunities for expanding plant-based offerings within hospital programmes may also present a valuable avenue for collaboration.

References:

- NYC Health + Hospitals 1.2 Million Plant-Based Meals Served
- NYC Health celebrates milestone
- Greener by Default Announces Expanded Partnership
- Sodexo Doubles Down on Plant-Forward Menus at 400 US hospitals
- An Innovative Program for Hospital Nutrition
- More Than 90% Patient Satisfaction for New York City Health + Hospitals' Plant-Based Meals

Patient Engagement Innovation

NYC Health + Hospitals deployed 140 trained **Food Service Associates (FSAs)** who serve as nutrition educators and patient advocates. This represents a significant investment in human resources that contributed substantially to programme success. **FSAs verbally present meal options using appetising descriptions, educate patients about nutritional benefits, record meal selections** on iPads, deliver trays, solicit feedback, and connect patients with registered dietitians when needed. This personalised, continuous engagement model creates a teachable moment that extends nutrition education beyond hospital discharge, improving long-term health literacy and outcomes. This FSA model could represent an opportunity for Thai stakeholders to arrange study visits to observe implementation firsthand.

Both Thai public and private hospitals could benefit from this FSA model. With strong traditions of patient care and hospitality, Thai hospitals could train nutrition educators to position plant-based eating as aligned with Buddhist principles, cultural traditions, and modern health science. For private hospital chains, this approach could differentiate service offerings and support premium brand positioning, while for public hospitals it could address health knowledge gaps. This approach could be effective in addressing Thailand's health literacy challenges around diet-related NCDs, as documented in public health research showing gaps in nutritional knowledge among Thai populations.

References:

- NYC Health + Hospitals Now Serving Culturally Diverse Plan-Based Meals
- How NYC hospitals made plant-based default
- Default Plant-Based Meals at New York City Health + Hospitals See Over 90% Patient Satisfaction
- Health literacy of unhealthy diet consumption in Thailand

Staff Training & Institutional Culture Shift

The rollout included extensive cross-departmental engagement: hospital CEOs, physicians, nurses, chefs, and support staff participated in tastings, Q&A sessions, and educational roadshows to build buy-in and address misconceptions. Doctors and physicians supported and validated the health benefits, and the hospital kept new menu items only if at least 80% of patients approved them.

This comprehensive engagement strategy is critical in the Thai context, where institutional hierarchy and respect for medical authority strongly influence adoption (as one interviewee noted). Engaging physician champions from leading Thai hospitals (notably Chulalongkorn, Ramathibodi, Siriraj) could accelerate acceptance and provide clinical validation that counters misconceptions about plant-based nutrition adequacy. While these institutions are leading government teaching hospitals, endorsements from physicians at well-regarded academic medical centres often shape decisions across both public and private healthcare in Thailand, where medical authority is highly trusted.

References:

- How NYC made plant-based default
- NYC Health + Hospitals Marks Milestone of 2 Million Plant-Based Meals Served
- An Innovative Program for Hospital Nutrition
- Canarymedia: NYC nudging patients
- Plant-Based Diet-Shift Initiative Case Studies: New York City
- NYC Health + Hospitals 1.2 Million Plant-Based Meals Served

Impact: People, Planet, Profit

People

More than 50% of inpatients consistently choose the plant-based default menu; **satisfaction rates remain above 90%.** Culturally adapted recipes support inclusivity and measurable improvements in patient health literacy and outcomes. Staff and patient feedback shape ongoing menu refinement.

Planet

The programme achieved a **36% reduction in food-related GHG emissions** in the first year. This contributed to a 29% drop in citywide food emissions across all public institutions. While direct food waste metrics aren't isolated, upstream savings from reduced meat procurement imply further environmental benefit. The model positions hospitals as environmental leaders, demonstrating that institutional food systems can deliver significant climate benefits at scale.

Profit

Direct **cost savings of USD0.59 per plant-based meal** compared with animal-protein menus. The programme enabled the NYC Health+ to save USD500,000 in its first year

(2022) and USD318,000 in 2023, with cumulative savings exceeding USD1.3 million through 2024. Projected annual savings stabilise around USD531,000 per year based on 900,000 meals, with five-year savings potentially reaching USD2.7 million. Cost advantages could stem from procuring minimally processed plant ingredients rather than expensive meat or meat alternatives.

In the NYC Health + model, cost savings accrue primarily to the hospital system (as the food purchaser), with Sodexo operating as the contracted caterer. For implementations in Thailand, whether savings benefit the hospital, the catering company, or are shared would depend on contractual arrangements. Hospitals contracting catering services could negotiate to ensure cost savings from plant-based procurement are passed through appropriately.

Beyond direct savings, the programme enhances brand reputation, positions NYC Health + Hospitals as a sustainability and public health leader, **attracts positive media coverage, and supports patient recruitment and retention by aligning with consumer values**. Per-meal cost savings would be particularly impactful in Thailand's growing cost-conscious healthcare environment. Public hospitals operating under budget constraints and private hospitals seeking competitive differentiation could leverage these savings while addressing consumer concerns about plant-based food affordability — a documented barrier to Thai adoption. The ESG positioning could also support Thai private hospitals attract more international investment or partnerships.

References:

- More Than 90% Patient Satisfaction for New York City Health + Hospitals' Plant-Based Meals
- Canarymedia: NYC nudging patients
- Plant-Based Diet-Shift Initiative Case Studies: New York City

What Made It Work

Leadership Commitment & Policy Alignment

Top-down political will from ex-Mayor Eric Adams and executive leadership at NYC Health + Hospitals ensured alignment across the municipal health system. The initiative was embedded within broader city policy frameworks including the Mayor's Office of Food Policy (MOFP), NYC Food Standards, and net-zero commitments which creates institutional momentum and cross-agency coordination.

Thai government support is already evident through plant-based protein regulatory development and recognition of the sector's economic potential. The Ministry of Public Health could issue similar procurement guidelines for public hospitals, while the National Food Committee could integrate plant-forward hospital meals into Thailand's National Strategic Plan for NCDs (2023-2027). Political champions within the Ministry of Public Health or provincial health administrations could replicate Mayor Adams' leadership role. On the other hand, private and listed hospitals in Thailand may not require these policy

precursors to act. Business imperatives including cost savings, ESG compliance, brand differentiation and Thailand's mandatory sustainability reporting requirements for SET-listed companies could drive decision-making independent of government policy.

In Asia, there are a few useful examples from private hospitals demonstrating leadership-driven sustainability commitments that encompass plant-forward food initiatives. Hong Kong's Adventist Hospitals, which are private and non-profit, have served only vegetarian meals to all patients for more than 15 years. Their experience shows that plant-based dining can work over the long term when it is presented as part of holistic care and adapted to familiar Chinese and Asian culinary traditions. In Singapore, Mount Alvernia Hospital takes a different approach by focusing on patient education around plant-based nutrition rather than making menu changes mandatory. The "education-first" model may be a good fit for Thai private hospitals that prefer to move gradually. While detailed case studies in Asia are still limited, these examples could provide relatable reference points for Thai private and listed hospitals.

References:

- VEGANFTA: New York City's Hospital Project Has Served Over 2 Million Plant-Based Meals to Patients
- Hong Kong Adventist Hospital - Makes Vegetarian Food More Delicious and Healthier
- Mount Alvernia Hospital – Plant based diets

Strategic Supplier & CSO Partnerships

Collaboration with Sodexo provided operational expertise, culinary capacity, and national foodservice infrastructure. Partnership with non-profit Greener by Default delivered evidence-based consulting, menu audits, behavioural science insights, staff training materials, marketing collateral, and impact measurement tools. This model demonstrates how non-profits can serve as implementation partners that de-risk institutional transformation.

Thai hospitals could access and collaborate with similar civil society organisations that are working in Thailand to pilot plant-based defaults. CSOs and/or its allies could provide similar means and resources on technical support and knowledge training at minimal cost. Although Sodexo is active in Thailand, its plant-based hospital programme is still focused mainly on the U.S. Bringing a similar model to Thailand would likely require Sodexo Thailand to take it up directly with their hospital clients or for hospitals in Thailand to partner with other potential foodservice providers instead.

Behavioural Science & Choice Architecture

The default-first approach proved critical, leveraging behavioural economics by making plant-based options the first choice without restricting alternatives. Research shows the first default is disproportionately selected, with minimal impact from secondary defaults. By focusing on one high-quality plant-based default per meal, NYC + Hospitals maximised uptake without overwhelming patients or staff. Avoiding stigmatising labels

and emphasising taste, quality, and cultural relevance made the programme less political and more socially inclusive.

This behavioural science approach would be suited to Thai cultural contexts, where gentle persuasion and respect for individual choice align with social norms. Avoiding confrontational "meat-free" messaging while emphasising delicious, familiar Thai dishes would help to maximise acceptance without creating resistance. Thai consumer research shows that there is openness to plant-based eating when taste and price concerns are addressed.

References:

- ProVeg: A multi-problem solution – why hospitals are serving plant-based by default

Continuous Feedback Loop

Patient satisfaction data, acceptance rates, and meal-specific feedback informed iterative menu improvements. The 80% satisfaction threshold for menu permanence ensured only successful dishes were scaled, maintaining quality and trust.

Thai hospitals could establish similar feedback mechanisms using existing patient satisfaction systems. Digital tools (mobile apps, QR codes) could capture real-time meal feedback, enabling rapid iteration on recipes and identifying which Thai dishes perform best in hospital settings.

References:

- Vegconomist: Default Plant-Based Meals at New York City Health + Hospitals See Over 90% Patient Satisfaction

Internal Culture Shift & Staff Empowerment

Engaging staff early and positioning FSAs as nutrition educators (not just food deliverers) elevated the programme from operational change to mission-driven care transformation. Doctors, physician champions, and clinical validation reinforced legitimacy, while executives support normalised plant-forward eating as a standard of care.

Thai corporate hospital staff could be trained further as nutrition educators to extend the "food as medicine" message. Engaging Thai doctors/physician champions from academic medical centres would be especially effective given the high regard for medical authority in Thai culture. This approach could also create professional development opportunities for hospital nutrition staff.

Enablers: Policy, NGO Support & Civil Society

NYC's broader food procurement policies (NYC Food Standards, Plant-Powered Fridays in schools, Meatless Mondays) created a supportive ecosystem. External advocacy from organisations like the Physicians Committee for Responsible Medicine, American College of Lifestyle Medicine, and civil society coalitions amplified impact and provided technical

resources. Formalised plant-forward associations are a recognised gap in Thailand to date, but CSO allies are beginning to advance work in this area.

Meanwhile, Thailand's emerging plant-based protein regulations, WHO Healthy Canteen initiatives, and Ministry of Public Health NCD programs could create parallel enabling environments. CSOs and NGOs operating in Thailand and potential partnerships with ARE (or similar organisations) could provide advocacy support and technical assistance for Thai hospital pilots.

Conclusion & Key Learnings

NYC Health + Hospitals' plant-based default programme demonstrates that large, complex public institutions can successfully transition to sustainable, health-promoting food systems at scale while achieving financial savings and high patient satisfaction. The initiative has become a flagship case study, inspiring Sodexo to replicate the model across 400 U.S. hospitals and attracting international delegations from Canada, Denmark, Germany, and the UK seeking to adapt the approach.

Key learnings from this case study include:

- 1. Cost savings and operational benefits appear encouraging:** Cumulative savings exceeding USD1.3 million, 36% emissions cuts, and 90%+ satisfaction rates provide strong evidence that plant-based defaults can deliver triple-bottom-line value at least for a government-subsidised hospital system. However, it remains uncertain whether similar economic savings would fully offset rollout costs (such as training, education, and menu development) in corporate or private hospitals. These metrics nonetheless directly address the primary cost barrier Thai consumers and institutions perceive as high cost while providing Return-on-Investment (ROI) data that may interest finance agencies and hospital CFOs.
- 2. Defaults work — but quality matters:** Behavioural nudges only succeed when paired with delicious, culturally resonant food. NYC + Health invested heavily in culinary development, taste-testing, and cultural customisation, ensuring their default food service was genuinely appealing. Thai cuisine's natural plant-richness provides similar opportunities. Thai hospitals could achieve even higher acceptance rates than NYC by leveraging popular Thai dishes.
- 3. Food waste linkage is connected:** While NYC + Health did not separately report food-waste metrics, the 36% emissions reduction reflects upstream savings from reduced meat procurement, which may imply less waste as meat has higher spoilage rates and environmental costs per unit. Future implementations should track waste explicitly to strengthen the business and climate case. Food waste is a significant concern in Thai hospitals, institutions and the wider foodservice sector and improved measurement could reveal additional cost savings while supporting Thailand's food security priorities. Notably, ARE's strategic relationship with Winnow Solutions provides

a valuable pathway for replication in integrating food-waste tracking across many of the companies ARE works with, helping to support their progress in this area.

4. No time-based / sales-specific targets, but transparent annual reporting:

NYC + Hospital does not seem to publish formal commitments such as "50% plant-based by 2025", but publicly tracks annual meals served, patient satisfaction, emissions, and cost savings, creating accountability through transparency. Thai hospitals could adopt similar annual disclosure frameworks initially, supporting ESG reporting and sustainable finance access without requiring upfront commitments that might face institutional resistance.

5. Staff as change agents: The FSA model on positioning frontline workers as educators and advocates was crucial. This differs from typical corporate foodservice operations and requires investment in training, which in turn generates impact on patient acceptance and institutional culture. Thai cultural emphasis on service excellence and patient care makes this model highly compatible. Training hospital staff as nutrition educators would enhance both clinical outcomes and staff professional development.

6. Cost-benefit data appears promising: With USD0.59 savings per meal apparent at the tray level and scalable to system-wide operational improvements, minimal capital investment, and immediate ROI, the business financial case appears clear. However, it is unclear whether these calculations include all associated project costs. NYC + Health has not published all costs or detailed ROI analyses — metrics that could further strengthen the business case. Research partnerships with Thai medical schools (such as Chulalongkorn, Mahidol University) could generate Thailand-specific health outcome data, creating additional evidence for national scale-up.

7. Scalability is being validated: Sodexo's planned expansion to 400 hospitals by 2026 is in progress, though not complete at the time of writing. As of April 2025, 131 hospitals are participating. This expansion validates the model as replicable across diverse institutional contexts and not limited to public or municipal hospitals. The inclusion of private and corporate healthcare clients suggests the plant-based default model can work across different ownership structures and business models. However, detailed breakdowns of participating hospital types (municipal vs. corporate vs. non-profit) have not been publicly disclosed. This emerging scalability helps reduce risk for Thai hospitals considering adoption and provides evolving prototypes for replication across Thailand's public and private hospital networks.

Key Facts

Item	Details
Location	New York City, USA (11 hospitals)
Sector	Hospital/Public Healthcare
Commitment/ Target	Plant-based by default for all inpatient meals since 2022; no time-bound % target but transparent annual tracking of meals, satisfaction, and emissions
Key Partners	Sodexo, Greener by Default, NYC Mayor's Office of Food Policy
Contact/Source	NYC Health + Hospitals, Greener by Default

4. Guckenheimer: Leading Corporate Catering's Plant-Forward Transformation at Scale

Summary Snapshot

Guckenheimer is a corporate catering and food services company, a wholly owned subsidiary of **ISS A/S** (a global facilities management group headquartered in Copenhagen and publicly listed on the Nasdaq Copenhagen Stock Exchange). The company manages and operates dining facilities (cafeterias and cafes) inside large businesses and tech campuses across approximately 250 sites in North America, focusing on providing chef-crafted, restaurant-quality meals to employees of corporate clients with an emphasis on healthy and sustainable options.

Guckenheimer has committed to making **55% of menu options plant-based by 2025**, which is the strongest commitment to date from any foodservice management company in the U.S. As of November 2025, multiple sources and reports, including Guckenheimer's own 2025 statements, indicated they are on track to meet this milestone. In addition, Guckenheimer has achieved a **64% food-waste reduction** (approximately USD1 million annual food-cost savings; 983,000 meals saved annually; 1,500 tCO₂e avoided annually) and earned the **#1 ranking on Humane World for Animals' U.S. Food Service Industry Protein Sustainability Scorecard** for four consecutive years (2022–2025), receiving an A+ grade. ISS and Guckenheimer have also launched a new **Zero Waste Cookbook** in May 2025, developed by Guckenheimer culinarians, highlighting zero-waste and climate-friendly recipes.

References:

- Guckenheimer Tops National Food Service Industry Protein Sustainability Scorecard for Fourth Consecutive Year
- Humane World for Animals Food Service Industry Protein Sustainability Scorecard 2025
- Guckenheimer Environmental Sustainability
- Guckenheimer becomes first major U.S. food services provider to cut food waste in half
- Guckenheimer Launches Zero-Waste Cookbook

Context: The Challenge

Market & Sustainability Pressure

Corporate clients increasingly expect food partners to help deliver on ESG and climate goals while maintaining cost and diner satisfaction. Guckenheimer publicly aligned with the **Coolfood Pledge (targeting a 25% reduction in food-related emissions by 2030, and halve its food waste by 2027)** and with **Menus of Change** principles to make “healthy, sustainable, delicious” the default; business-relevant commitments that also respond to employee demand for plant-forward choices.

Client and Employee Value

Guckenheimer positions whole-person health at the heart of workplace dining, using food programmes to support employee well-being (e.g., whole-foods menus, nutrition programming, on-site RDs) and to reflect the values of modern workplaces.

Many corporate clients place a high value on environmental responsibility and wellness. They seek partners who can help them achieve their own ESG goals whether reducing carbon footprints, bolstering local communities, or promoting healthier lifestyles among employees. This shared commitment creates a powerful alliance, as Guckenheimer's menus and operations help clients fulfill broader sustainability promises. To make those programmes appealing and not niche, the company aligns its culinary approach with Menus of Change — a collaboration between The Culinary Institute of America and the Harvard T.H. Chan School of Public Health, which focuses on **flavour-first with plant-forward framework** that resonates with clients and employees alike.

Reputation and Competitive Advantage

Guckenheimer has been **rated in consecutive years at #1** on the Humane World For Animals' Protein Sustainability Scorecard, signalling credible leadership to current and prospective clients. The company was the first among corporate caterers to sign the Coolfood Pledge and has earned a **Coolfood Meals badge** from the World Resources Institute for developing more than 500 low-carbon recipes.

References:

- ISS commits to the Cool Food Pledge
- Reshaping Corporate Dining with Menus of Change
- SFB: Guckenheimer maintains top position in Protein Sustainability Rankings for fourth year
- Guckenheimer Environmental Sustainability

The Action / Transformation

Menu Engineering (plant-based options, pricing, placement)

Guckenheimer rolled out **PowerPlant**, a vegetable and plant-based culinary programme and toolkit designed to make plant-based foods at the core of its menu design, aiming to reduce reliance on animal protein. Essentially, this is a lever for unit-cost control and carbon reduction. PowerPlant guides chefs to use more seasonal, regional vegetables and plant-based alternatives.

The company placed a plant-based station in every one of its cafes, driving the 55% plant-based target through its central menu. It also aligns its menu language and culinary cues with Menus of Change to emphasise flavour, craft, and cultural authenticity.

Guckenheimer has also committed to reducing animal protein purchases annually through 2027, extending its sustainability trajectory beyond the 55% menu target.

References:

- ISS makes bold plant-based menu pledge
- Reshaping Corporate Dining with Menus of Change
- Top culinary developer at Guckenheimer shares 5 strategies for creating plant-based menus at scale
- SFB: Guckenheimer maintains top position in Protein Sustainability Rankings for fourth year

Procurement & Supply Partnerships

Guckenheimer emphasises **sustainable, organic, local sourcing** and building a library of **500+ low-carbon recipes** eligible for the consumer-facing Coolfood Meals badge. ISS teams up with Coolfood to offer diners low-carbon meals (Coolfood Meals) that have 38% fewer carbon emissions than the average meal.

The company has partnered with the Beans is How Coalition to expand the use of legumes and plant-based protein sources in recipes, aligning with evidence that legumes deliver affordable protein while improving soil health.

Local sourcing is a priority. Guckenheimer supports regional farmers and artisans, favouring suppliers committed to regenerative practices and animal welfare while supplementing with responsibly sourced global products when necessary.

References:

- Guckenheimer Environmental Sustainability
- ISS teams up with Coolfood to bring low-carbon meals to diners
- Guckenheimer Achieves Top Ranking for Protein Sustainability

Marketing/guest experience innovations

Guckenheimer's approach to marketing is using sustainability transparency to normalise climate-friendly choices without relying on the "vegan" label. By pairing Coolfood-aligned labelling with impact storytelling (waste, CO₂e, meals saved), Guckenheimer encourages adoption while keeping the experience taste-first. Positive language that emphasises flavour and enjoyment attracts a wider audience. For instance, guests are more likely to choose a "roasted mushroom and garlic" dish than one labeled "vegan" or "meatless".

The company is soon beginning to add carbon labels to its menus, allowing diners to see the impact of their meal choices. Carbon footprint labelling and storytelling around ingredients and local suppliers help boost engagement. The Coolfood Meals badge is displayed to help customers quickly identify low-carbon options, empowering them to make climate-friendly decisions.

References:

- Only Half of US Caterers Have Commitments to Shift to Climate-Smart Proteins
- Low Carbon Meals That Make a Difference – Coolfood
- Reshaping Corporate Dining with Menus of Change

Staff/Chef Training

Guckenheimer formalised its culinary shift by partnering with Humane World For Animals to develop and deliver **specialised plant-based culinary training** to its staff and chefs. This partnership enabled the company to scale its commitment by certifying trained staff as Plant-Powered Ambassadors, embedding expertise in creating delicious, healthy meals across its operations. In 2024, Guckenheimer chefs completed two pilot training programmes with Humane World for Animals, including a Virtual Culinary Workshop where chefs piloted at least four new plant-based options on their menus each week for five weeks.

Chefs who complete the programme receive certification as **Plant-Powered Ambassadors** — internal champions who continue to educate future chefs in plant-based cuisine and embed expertise in creating delicious, healthy meals across operations. This certification is issued internally by Guckenheimer following completion of the Humane World for Animals training curriculum.

The company also hired a culinary trainer who is co-developing an entire sustainability curriculum to help culinary teams communicate effectively with clients on the benefits of adding more plant-based options.

The Plant-Powered Ambassador programme is expanding firm-wide, ensuring that plant-forward expertise is embedded at scale across all sites.

References:

- Guckenheimer Tops National Food Service Industry Protein Sustainability Scorecard for Fourth Consecutive Year
- ISS Guckenheimer, Metz Culinary Management and Sodexo top the 2024 Protein Sustainability Scorecard
- Humane Society Food Service Scorecard 2025

Impact: People, Planet, Profit

People

Guckenheimer scaled capability building for chefs across sites through Forward Food trainings and an internal Plant-Powered Ambassador programme, enabling kitchens to deliver flavour-first, plant-forward dishes as a norm rather than a niche. Chefs collaborate through forums to share strategies and repurpose trimmings, resulting in creative outputs like the Zero Waste Cookbook. This approach makes workplace dining more inclusive, which accommodates vegans, vegetarians, flexitarians, and those with religious dietary restrictions, while ensuring consistent quality and plant-forward skills across all client sites.

Guckenheimer's training model demonstrates that embedding plant-based expertise at the chef level, instead of relying on top-down mandates, creates lasting culture change. Corporate caterers in Thailand could partner with local NGOs to develop similar certification programmes that build internal champions for plant-forward menus.

Planet

From a 2022 baseline, Guckenheimer achieved a 64% reduction in food waste — equating to approximately 983,000 meals saved and 1,500 tCO₂e avoided annually — progress that supports its Coolfood Pledge target of a 25% reduction in food-related GHG emissions by 2030. This aligns with ISS's global ambition to halve food waste by 2027 and the UN's Sustainable Development Goal 12.3. The company's 500+ Coolfood Meals feature plant-rich dishes with 38% lower carbon emissions than average meals. Notably, the USD1 million annual savings from waste reduction have been reinvested into plant-based culinary innovation and chef training, creating a self-reinforcing cycle where waste reduction funds plant-forward menu development.

Guckenheimer's experience shows that food waste reduction and plant-based expansion are complementary, not separate, strategies. Corporate caterers in Thailand could adopt this integrated model, using AI-driven waste tracking to generate savings that fund plant-forward innovation while helping clients meet ESG goals.

References:

- Guckenheimer becomes first major U.S. food services provider to cut food waste in half
- Guckenheimer Environmental Sustainability

Profit / Business Value

Data-driven kitchen operations deliver approximately USD1 million annually in food-cost savings through waste reduction and production control. These savings are reinvested into culinary innovation, creating a self-sustaining model. Guckenheimer's #1 national ranking on the Protein Sustainability Scorecard strengthens credibility with ESG-focused clients, while published impact metrics (meals saved, tCO₂e avoided, cost savings) enable clients to reference outcomes in their own ESG reporting. While Guckenheimer does not publish formal price-parity data, competitive pricing for plant-forward menus is likely achievable given the documented savings, operational efficiencies, and generally lower procurement costs for plant-based ingredients compared to premium animal proteins.

Guckenheimer's business model shows that sustainability investments can be self-funding when operational savings are strategically reinvested. For corporate caterers in Thailand, transparent impact reporting – both internal (to motivate staff) and external (to support client ESG disclosures) – could differentiate providers in an increasingly sustainability-conscious market.

References:

- Guckenheimer becomes first major U.S. food services provider to cut food waste in half
- Guckenheimer Tops National Food Service Industry Protein Sustainability Scorecard
- Guckenheimer's Food Waste Reduction Efforts

What Made It Work

Leadership & Targets

Guckenheimer made a public, time-bound goal: 55% of menu options plant-based by 2025 — the strongest commitment from any foodservice management company. This signals executive commitment and makes the shift organisation-wide, not a pilot project. By linking this target to the WRI Coolfood Pledge (25% GHG reduction by 2030), the company created external accountability.

The combination turns vision into management discipline: targets translate into chef training and recipe pipelines (PowerPlant), sustainable procurement, waste-reduction KPIs, and metrics clients can reference in ESG reporting. The company has also committed to reducing animal protein purchases annually through 2027, extending accountability beyond menu composition to procurement volumes.

References:

- ISS makes bold plant-based menu pledge
- Guckenheimer Environmental Sustainability

Data-Driven Kitchen Operations

Winnow AI analytics created the margin pathway to scale plant-forward menus while controlling costs. The Winnow Vision system — featuring motion-sensor cameras and smart scales — tracks food waste in real-time across hundreds of kitchens, providing daily, weekly, and monthly reports on waste patterns and commonly discarded items. These AI-enabled waste tracking and feedback loops drive continuous improvement, unlock savings, and inform menu optimisation. Chefs use data insights to refine menus, adjust portion sizes, and reimagine workflows, transforming waste data into actionable kitchen decisions.

References:

- Winnow: Guckenheimer becomes first major U.S. food services provider to cut food waste in half
- Guckenheimer's Food Waste Reduction Efforts
- FSD: Top culinary developer at Guckenheimer shares 5 strategies for creating plant-based menus at scale

Partnerships and Credibility

Guckenheimer collaborates with third-party organisations that provide methodology, measurement, and external validation, which are crucial for client trust and ESG reporting:

- **Forward Food** (with Humane World for Animals): Delivers chef training and standards that normalise plant-based technique at scale.
- **Winnow**: Supplies kitchen-level analytics that independently quantify waste, savings, and impact.
- **Menus of Change** (CIA x Harvard): Provides a taste-led, evidence-based culinary framework.
- **Coolfood** (World Resources Institute): Enables low-carbon recipe certification and emissions tracking.
- **Beans is How Coalition**: Expands use of legumes and plant-based protein sources.

References:

- ISS makes bold plant-based menu pledge
- ISS teams up with Coolfood

Culinary Culture & Playbooks

Guckenheimer's PowerPlant playbook gives chefs simple, practical guardrails on how to build recipes, size portions, and choose ingredients so the food stays centred on what tastes great, not what diners give up. Guided by Menus of Change ideas (deep, familiar cultural flavours; satisfying textures), the company creates plant-forward dishes that compete with meat favorites.

The company also engages teams through friendly competition — rewarding locations that innovate popular dishes or significantly reduce animal protein use. Toolkits that "flip the plate" help reframe menus and shift perceptions. With ISS publicly committing to 55% plant-based menus by 2025, this is not a side project but how the kitchen runs every day, with taste-led sustainability as the norm.

References:

- ISS makes bold plant-based menu pledge
- FSD: Top culinary developer at Guckenheimer shares 5 strategies for creating plant-based menus at scale

Culture & Capability

Guckenheimer backs the strategy with people and process. The Plant-Powered Ambassador certifications (issued internally following completion of Humane World for Animals training) build in-house champions who educate future chefs and embed plant-based expertise across sites. Active culinary R&D and a shared library of 500+ low-carbon recipes help sites roll out consistent, flavour-first menus.

Publishing impact metrics (meals saved, tCO₂e avoided, cost savings) keeps teams and clients aligned on outcomes, reinforcing adoption across the portfolio. These metrics are communicated both internally (to motivate staff and drive accountability) and externally (enabling clients to incorporate results into their own ESG disclosures).

The new Zero Waste Cookbook (launched May 2025) shares strategies developed across Guckenheimer kitchens with the public, further extending the company's sustainability leadership and providing practical implementation tools.

References:

- Guckenheimer Tops National Food Service Industry Protein Sustainability Scorecard
- Guckenheimer Launches Zero-Waste Cookbook

Conclusion & Key Learnings

Guckenheimer demonstrates that corporate foodservice providers can successfully scale plant-forward menus while achieving cost savings, climate benefits, and stronger client relationships. The company's integrated approach by combining smart menu design, AI-driven waste reduction, and chef training contribute towards creating a self-sustaining model where operational savings fund culinary innovation, enabling competitive pricing and taste equivalence for plant-based options. The case study provides several useful takeaways for catering and corporate foodservice providers.

- 1. Public, time-bound targets drive accountability:** Guckenheimer's 55% plant-based by 2025 commitment, the strongest in the U.S. foodservice industry, created organisation-wide focus and differentiated the company from competitors. Vague sustainability pledges would lack the same traction.
- 2. Client alignment is the unlock:** Guckenheimer succeeded by framing plant-forward menus as helping corporate clients meet their own ESG goals, not necessarily as a caterer preference. This shared value proposition made adoption collaborative rather than mandated.
- 3. Technology enables scale and credibility:** Winnow's AI-powered waste tracking provided the data infrastructure to optimise menus, demonstrate impact, and generate savings. Without measurement, neither operational improvement nor client reporting would be credible.
- 4. Training creates culture, not compliance:** The Plant-Powered Ambassador programme embedded plant-forward expertise at the chef level, making sustainable cooking a skill and identity rather than a policy. This bottom-up capability building proved more doable than top-down mandates.
- 5. Flavour-first positioning attracts mainstream diners:** Avoiding vegan labels and steering taste, craft, and cultural authenticity increased appeal beyond plant-based diners to flexitarians and traditional meat-eaters.
- 6. Waste reduction and plant-forward menus are synergistic:** Companies pursuing climate goals should consider both initiatives together where data systems and culinary innovation can reinforce each other, and savings from one fund investment in the other.

Nevertheless, Guckenheimer's success raises questions that could offer further guidance for others wishing to pursue similar transformations. Understanding how chefs have embraced the plant-forward transition, and which aspects of training resonated most, could provide a valuable lesson for scaling culinary cultural change. Similarly, insights into how Guckenheimer created client buy-in, especially among those newer to ESG priorities, would benefit foodservice providers seeking to position plant-forward menus as a shared value proposition. Moreover, given that ISS A/S is headquartered in

Copenhagen, and Denmark has the world's first national plant-based action plan, the Denmark-based model's positioning of plant-based work within carbon reduction and sustainability targets rather than explicit percentage commitments offers a complementary approach worth exploring

While Guckenheimer does not currently operate in Thailand, its model offers valuable insights for Thai corporate caterers. Providers could adopt 20-30% plant-based menu targets by 2030, leveraging Thailand's naturally plant-rich cuisine and Buddhist vegetarian traditions. Global frameworks like the Coolfood Pledge and Menus of Change could enhance ESG credibility, while AI waste-tracking systems (such as Winnow) could generate cost savings to fund plant-forward business model. Partnerships with local NGOs or think-tanks could replicate the chef training model.

Ultimately, Guckenheimer's experience demonstrates that plant-forward corporate dining succeeds when supported by measurable targets, data-driven operations, reinvestment of savings into culinary innovation, and chef-led culture change. Most importantly, the initiative is positioned not as a caterer's agenda but as a partnership helping clients deliver on their ESG commitments — a framing that could create business opportunities for Thai and international corporate caterers and the growing number of Thai companies that are prioritising sustainability.

Several Thai corporate catering companies operate with similar business models to Guckenheimer, such as Sodexo Thailand, Foodhouse Thailand, Gourmet House Culinary Care, Epicure Catering, and SSP Thailand. These providers could learn from Guckenheimer's integrated approach in combining AI-driven waste tracking, chef training programmes, and ESG-aligned client value propositions, adapted to Thailand's traditional plant-rich cuisine. Such a model could support both corporate clients' sustainability commitments and enable caterers to differentiate through measurable environmental and operational performance.

References:

- Guckenheimer Tops National Food Service Industry Protein Sustainability Scorecard
- ISS makes bold plant-based menu pledge
- Denmark publishes world's first national action plan for plant-based foods
- Guckenheimer Environmental Sustainability

Key Facts

Item	Details
Location	North America (approximately 250 corporate dining sites); Parent company ISS A/S headquartered in Copenhagen, Denmark (publicly listed on Copenhagen Stock exchange)
Sector	SectorCorporate Catering / Foodservice (cafeterias, cafes, executive dining, micro-kitchens for tech campuses and large businesses)
Commitment/ Target	55% of menu options plant-based by 2025 (achieved); 25% reduction in food-related GHG emissions by 2030 (Coolfood Pledge); 50% food waste reduction by 2025 (exceeded with 64%); Reduce animal protein purchases annually through 2027
Key Partners	Humane World for Animals (Forward Food chef training), Winnow (AI-powered waste tracking), World Resources Institute (Coolfood Pledge & Coolfood Meals badge), Menus of Change (Culinary Institute of America × Harvard T.H. Chan School of Public Health), Beans is How Coalition
Contact/Source	<u>Guckenheimer</u> ; <u>ISS World</u> ; <u>Humane World for Animals Food Report</u> ; <u>Guckenheimer Environmental Sustainability</u>

Conclusion

The four case studies collectively demonstrate that institutional food systems transformation toward plant-forward menus can be economically viable, operationally feasible, and strategically advantageous across diverse sectors. Each organisation – working within distinct regulatory, market, and cultural contexts – achieved measurable progress toward plant-based commitments while generating cost savings, emissions reductions, improved health outcomes, and enhanced brand positioning.

Several enabling conditions emerge across all four case studies:

- 1. Clear, time-bound targets (e.g., 50-55% plant-based by specific dates)** create accountability and direct organisational resources.
- 2. Data-driven operations**—whether through AI-powered waste tracking, customer satisfaction monitoring, or sales analytics — enable continuous improvement and cost justification.
- 3. Chef and staff training programmes** that embed plant-based expertise at operational levels drive culture change and ensure quality.
- 4. Partnerships with credible organizations** (NGOs, research institutions, technology providers) add methodology, legitimacy, and implementation support.
- 5. Cultural localisation of plant-based options** that honour regional cuisines and consumer preferences prove essential for acceptance.
- 6. Framing plant-based eating** as aligned with health, sustainability, affordability, and tradition rather than restriction.
- 7. Transparent metrics disclosure** both internally and externally, maintains momentum and supports stakeholder reporting.

Despite encouraging global evidence, several research gaps persist that require further study to strengthen the plant-forward narrative. **Direct business case clarity remains limited.** While all cases document savings for reinvestment in culinary innovation and operational efficiencies, detailed per-meal profit margin analysis and full cost-of-implementation accounting are rarely published, leaving the direct profitability impact of plant-based switching unclear. **Staff experience documentation is scarce.**

Most organisations do not publicly disclose staff feedback on implementation challenges and mitigation strategies. **Private sector hospital evidence is limited.** NYC Health + Hospitals operates within a government-funded system, potentially limiting direct applicability to private hospitals operating under different cost structures and margin requirements. However, this case remains instructive regardless of entity type, as core

operational principles and stakeholder engagement strategies can be applied across both government-funded and private models. **Waste-reduction correlation has not been systematically documented.** Linking plant-based menu adoption to measurable waste reduction and demonstrating the economic feedback loop would significantly strengthen business cases for institutional adoption.

Thailand possesses distinctive advantages: a plant-rich cuisine, Buddhist vegetarian heritage, an expanding alternative protein sector, growing wellness tourism, and an urgent health imperative. Plant-forward institutional transformation is an achievable near-term goal. By adopting clear targets, investing in data-driven operations and chef training, forging partnerships with credible organisations, and communicating transparently about progress, Thailand's foodservice sector can advance climate action, improve population health, unlock economic opportunity, and establish Thailand as a regional and global leader in the plant-based food industry.

The case studies provide a clear, replicable roadmap. The competitive advantage belongs to those who move first. The opportunity is now.