

# THE EATING CITY PLATFORM: Experiences in public foodservices

A necessary change of paradigm?



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## Why "Eating City" ?

Cities "eat" food that is produced elsewhere.  
In 2030 the 70% of the world's population will live in an urban context.

### Facing a Dilemma in Europe ?

More than 700 Kg of food bought per person/year and 500 Kg of waste per person/year mostly related to food and beverage.

43% of the Ecological footprint related to what we eat.

More than 30% of children overweight + around 18% already obese

Worrying quantities of food leftovers in the canteens!

6% of the total health budget used to cure food related pathologies.  
In Italy in the past 15 years public health expenses are doubled from 50 Billion Euro to 105 Billion Euro

## What is Eating City ?

Eating City aims to give life to ideas, to stimulate intellectual dialogue and to foster long term vision of public & and private decision makers on the future of sustainable urban food supply chains worldwide.

Action-oriented, Eating city also evidences good practices and constructive propositions to shift the paradigm; the ideal place where food, health, environment and social values meet the economy.

Thinking Tables, Workshop, Conferences to gather, share and spread experiences and finally elaborate concrete proposals for decision makers.



## Key words:

City Food Policy

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Sustainability Wellness Food taste Territory Research  
Governance Energy Culture Social Values  
Innovation Networking Economy  
Food supply chain

## **Why should we start from social foodservices ?**

Every year, a Italian city of 1 million inhabitants spends an average of 45 million € for social and school public foodservices and around 20 million € for hospital foodservices.

**Nowadays no institution have a systemic vision of the global food chain within a single city/territory.**

In the last decade, food supply chain externalities have become more and more relevant, but still are not adequately evaluated.

# The European Market of Social Foodservices

| WEST EUROPE              | Million Meals |              |              |              | % penetration of the Market |             |             |             | Turnover (million €) |               |               |
|--------------------------|---------------|--------------|--------------|--------------|-----------------------------|-------------|-------------|-------------|----------------------|---------------|---------------|
|                          | 2006          | 2007         | 2008         | 2010         | 2006                        | 2007        | 2008        | 2010        | 2006                 | 2007          | 2008          |
| Austria                  | 52            | 55           | 56           | 59           | 20,0                        | 21,3        | 22,0        | 23,6        | 239                  | 257           | 265           |
| Belgium                  | 129           | 134          | 139          | 150          | 26,2                        | 27,2        | 28,1        | 30,6        | 580                  | 609           | 645           |
| Denmark                  | 59            | 61           | 63           | 68           | 14,9                        | 15,4        | 15,9        | 17,4        | 282                  | 296           | 310           |
| Finland                  | 100           | 102          | 103          | 107          | 20,5                        | 20,9        | 21,1        | 22,3        | 452                  | 468           | 480           |
| France                   | 1 190         | 1 238        | 1 289        | 1 365        | 33,6                        | 34,8        | 36,0        | 37,9        | 5 240                | 5 530         | 5 900         |
| Germany                  | 528           | 540          | 555          | 600          | 15,7                        | 16,1        | 16,5        | 17,8        | 2 635                | 2 727         | 2 850         |
| Greece                   | 30            | 34           | 37           | 42           | 14,4                        | 16,3        | 17,6        | 19,9        | 64                   | 74            | 85            |
| Ireland                  | 96            | 109          | 115          | 125          | 50,5                        | 57,1        | 60,2        | 65,8        | 315                  | 369           | 400           |
| Italy                    | 798           | 821          | 860          | 920          | 44,7                        | 46,3        | 48,9        | 53,2        | 3 590                | 3 790         | 4 090         |
| Luxembourg               | 9,5           | 9,8          | 10,5         | 11,5         | 45,2                        | 46,7        | 52,5        | 57,5        | 74                   | 78            | 85            |
| Netherlands              | 310           | 305          | 310          | 320          | 36,3                        | 36,1        | 36,9        | 37,9        | 1 056                | 1 064         | 1 095         |
| Portugal                 | 130           | 135          | 141          | 148          | 37,2                        | 38,0        | 39,2        | 41,0        | 435                  | 455           | 485           |
| Spain                    | 376           | 395          | 420          | 460          | 39,9                        | 41,6        | 44,2        | 51,1        | 1 300                | 1 405         | 1 540         |
| Sweden                   | 104           | 106          | 108          | 111          | 12,3                        | 12,6        | 12,8        | 13,2        | 454                  | 468           | 485           |
| U.K                      | 1 284         | 1 345        | 1 430        | 1 566        | 36,4                        | 38,2        | 40,9        | 45,4        | 5 091                | 5 417         | 5 250         |
| <b>TOTAL WEST EUROPE</b> | <b>5 196</b>  | <b>5 390</b> | <b>5 637</b> | <b>6 053</b> | <b>30,1</b>                 | <b>31,2</b> | <b>32,7</b> | <b>35,3</b> | <b>21 807</b>        | <b>23 007</b> | <b>23 965</b> |

# The European Market of Social Foodservices

73.6 billion Euro /Year  
21.0 billion/Year Meals served

| EAST EUROPE                     | Million Meals |               |               |               | % penetration of the Market |             |             |             | Turnover (million €) |               |               |
|---------------------------------|---------------|---------------|---------------|---------------|-----------------------------|-------------|-------------|-------------|----------------------|---------------|---------------|
|                                 | 2006          | 2007          | 2008          | 2010          | 2006                        | 2007        | 2008        | 2010        | 2006                 | 2007          | 2008          |
| Cyprus                          | 0,4           | 0,5           | 0,7           | 1,0           | 0,7                         | 0,8         | 1,2         | 1,7         | 1,8                  | 2,6           | 3,8           |
| Czech Republic                  | 118           | 125           | 131           | 140           | 16,3                        | 17,2        | 18,2        | 19,7        | 194                  | 209           | 225           |
| Estonia                         | 9,5           | 10,5          | 11,0          | 13,0          | 14,3                        | 16,2        | 16,9        | 20,0        | 11                   | 12,5          | 13,5          |
| Hungary                         | 139           | 143           | 145           | 152           | 19,0                        | 19,7        | 20,1        | 21,3        | 155                  | 162           | 170           |
| Latvia                          | 2,2           | 2,5           | 3,0           | 3,5           | 2,2                         | 2,6         | 3,1         | 3,7         | 3                    | 3,5           | 4,5           |
| Lithuania                       | 4,0           | 4,5           | 5,0           | 6,0           | 2,5                         | 2,9         | 3,3         | 4,1         | 4                    | 4,7           | 5,5           |
| Malta                           | 3,8           | 4,1           | 4,4           | 5,0           | 28,1                        | 29,5        | 30,6        | 33,3        | 11                   | 12            | 13            |
| Poland                          | 44            | 52            | 60            | 75            | 2,5                         | 3,0         | 3,4         | 4,3         | 85,7                 | 103,7         | 122,7         |
| Slovakia                        | 19            | 21            | 24            | 30            | 7,9                         | 8,9         | 10,4        | 13,0        | 30,5                 | 35            | 41            |
| Slovenia                        | 15            | 17            | 19            | 22            | 14,3                        | 16,2        | 19,6        | 22,4        | 44                   | 51            | 59            |
| <b>TOTAL EAST EUROPE</b>        | <b>355</b>    | <b>380</b>    | <b>404</b>    | <b>448</b>    | <b>9,0</b>                  | <b>9,6</b>  | <b>10,3</b> | <b>11,6</b> | <b>540</b>           | <b>596</b>    | <b>658</b>    |
| <b>TOTAL Contracted</b>         | <b>5 550</b>  | <b>5 770</b>  | <b>6 040</b>  | <b>6 500</b>  | <b>26,2</b>                 | <b>27,2</b> | <b>28,5</b> | <b>31,0</b> | <b>22 347</b>        | <b>23 603</b> | <b>24 623</b> |
| <b>TOTAL Self-Operated</b>      | <b>15 650</b> | <b>15 430</b> | <b>15 120</b> | <b>14 500</b> | <b>73,8</b>                 | <b>72,8</b> | <b>71,5</b> | <b>69,0</b> | <b>49 053</b>        | <b>49 597</b> | <b>48 977</b> |
| <b>TOTAL Social Foodservice</b> | <b>21 200</b> | <b>21 200</b> | <b>21 160</b> | <b>21 000</b> | <b>100</b>                  | <b>100</b>  | <b>100</b>  | <b>100</b>  | <b>71 400</b>        | <b>73 200</b> | <b>73 600</b> |

Source: GIRA FOODSERVICE

## Eating City Study & Research:


Starting from the experiences of Risteco and its partners, Eating City includes a working team dedicated to study sustainable catering new models.










Starting from 2003, main research activities on meal life cycle analysis allowed to point out the **logistics** (food supply chain) and the **waste management**, as two main levers to reduce the environmental impact, independently of food menu template and nutrition value.



# Meal GHG emissions

"Scenario A" = 4,63 Kg CO<sub>2</sub> Equiv.

Scenario.....> A 

| Cycle de vie "Repas" Kg CO <sub>2</sub> Eq. | 10  | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 | %      |
|---|---|----|----|----|----|----|----|----|----|-----|--------|
| <b>Prod. matières premières:</b> 4,085      |   |    |    |    |    |    |    |    |    |     | 88,07% |
| Entrée 0,095                                |    |    |    |    |    |    |    |    |    |     | 2,06%  |
| Plat protidique 3,263                       |   |    |    |    |    |    |    |    |    |     | 70,34% |
| Accompagnement 0,000                        |   |    |    |    |    |    |    |    |    |     | 0,00%  |
| Fruit, Fromage, Dessert 0,279               |    |    |    |    |    |    |    |    |    |     | 6,01%  |
| Pain 0,037                                  |    |    |    |    |    |    |    |    |    |     | 0,79%  |
| Emballages 0,411                            |    |    |    |    |    |    |    |    |    |     | 8,86%  |
| <b>Logistique (primaire)</b> 0,043          |   |    |    |    |    |    |    |    |    |     | 0,93%  |
| <b>Production de Repas:</b> 0,355           |    |    |    |    |    |    |    |    |    |     | 7,65%  |
| Consommation d'énergie 0,323                |    |    |    |    |    |    |    |    |    |     | 6,96%  |
| Déchets 0,032                               |   |    |    |    |    |    |    |    |    |     | 0,69%  |
| <b>Logistique (secondaire)</b> 0,027        |   |    |    |    |    |    |    |    |    |     | 0,59%  |
| <b>Consommation:</b> 0,128                  |  |    |    |    |    |    |    |    |    |     | 2,76%  |
| Déchets 0,128                               |   |    |    |    |    |    |    |    |    |     | 2,76%  |
| <b>Total</b> 4,638                          |   |    |    |    |    |    |    |    |    |     | 100%   |

Scenario A:

Menu including beef meat.

Greenhouse gas calculated for foodstuffs transported on road, according to their geographical origin :

25% = 100 Km

25% = 500 Km

25% = 1000 Km

25% = 1500 Km

Source:

Study by Risteco

## Waste in Social Foodservices per capita

| Production et consommation du repas Rest. Scolaire |            |                |
|--|------------|----------------|
| Type de déchets                                    | Gr         | %              |
| Organique  | 185        | 71,15%         |
| Emballages   | 40         | 15,38%         |
| Couverts en plastique                              | 0          | 0,00%          |
| Indifférencié                                      | 35         | 13,46%         |
| <b>Total par repas servi</b>                       | <b>260</b> | <b>100,00%</b> |

| Production et consommation du repas Rest. Scolaire |            |                |
|--|------------|----------------|
| Type de déchets                                    | Gr         | %              |
| Organique  | 211        | 74,82%         |
| Emballages   | 69         | 24,42%         |
| Couverts en plastique                              | 0          | 0,00%          |
| Indifférencié                                      | 2          | 0,76%          |
| <b>Total par repas servi</b>                       | <b>282</b> | <b>100,00%</b> |

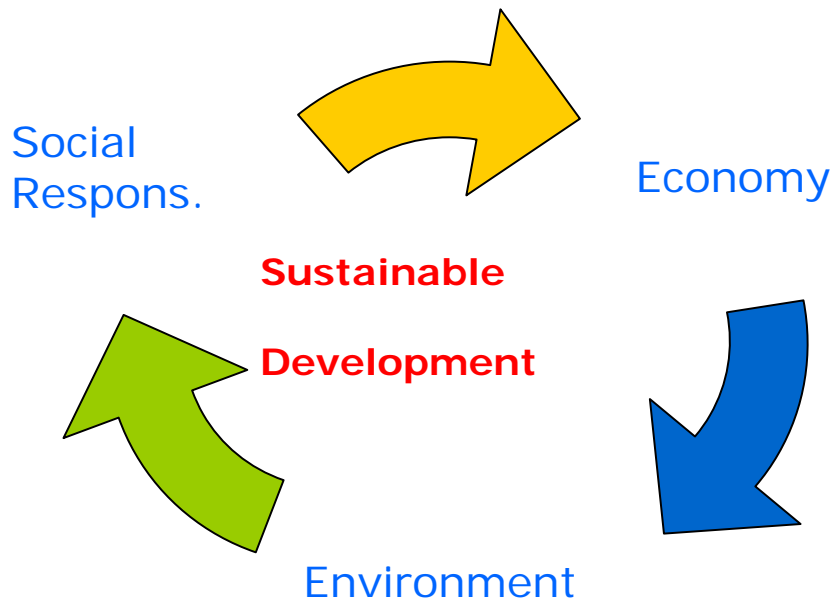
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Each meal consumed out of home = 250 g of waste

## WIN WIN MENTALITY

A trustworthy win win mentality: public buyers and food providers must feel as partners and not antagonists, with a unique objective:

**to innovate and implement more sustainable food services.**



Why sustainable food is worthwhile:

- +Local food = less Miles, less pollution
- +More taste = less waste
- +Nutrient food = less health expanses
- +Soil preservation = save biodiversity

**= Green Public Procurement**

Life Cycle Thinking approach is a key of this change of paradigm

# Meals ingredients, talking about Fish!



| BENEFITS                                  | FISHERY                     |                              |
|---|-----------------------------|------------------------------|
|   | LARGE SCALE                 | SMALL SCALE                  |
| Subsidies                                 | \$\$\$\$\$<br>25-27 billion | \$<br>5-7 billion            |
| Number of fishers employed                | <br>about 1/2 million       | <br>over 12 million          |
| Annual catch for human consumption        | <br>about 30 million t      | <br>same: about 30 million t |
| Annual catch reduced to fishmeal and oils | <br>35 million t            | <br>Almost none              |
| Annual fuel oil consumption               | <br>about 37 million t      | <br>about 5 million t        |
| Catch per tonne of fuel consumed          | =<br>1-2 t                  | =<br>4-8 t                   |
| Fish and other sealife discarded at sea   | <br>8-20 million tonnes     | <br>Very little              |

Source : Pauly and Jacquet, Conservation Biology, 2002

# Financial Key n° of the italian public foodservices:

**financial statement analysis years 1996 2010**

representative sample of 43% of the whole contract market (data in /000 euros)

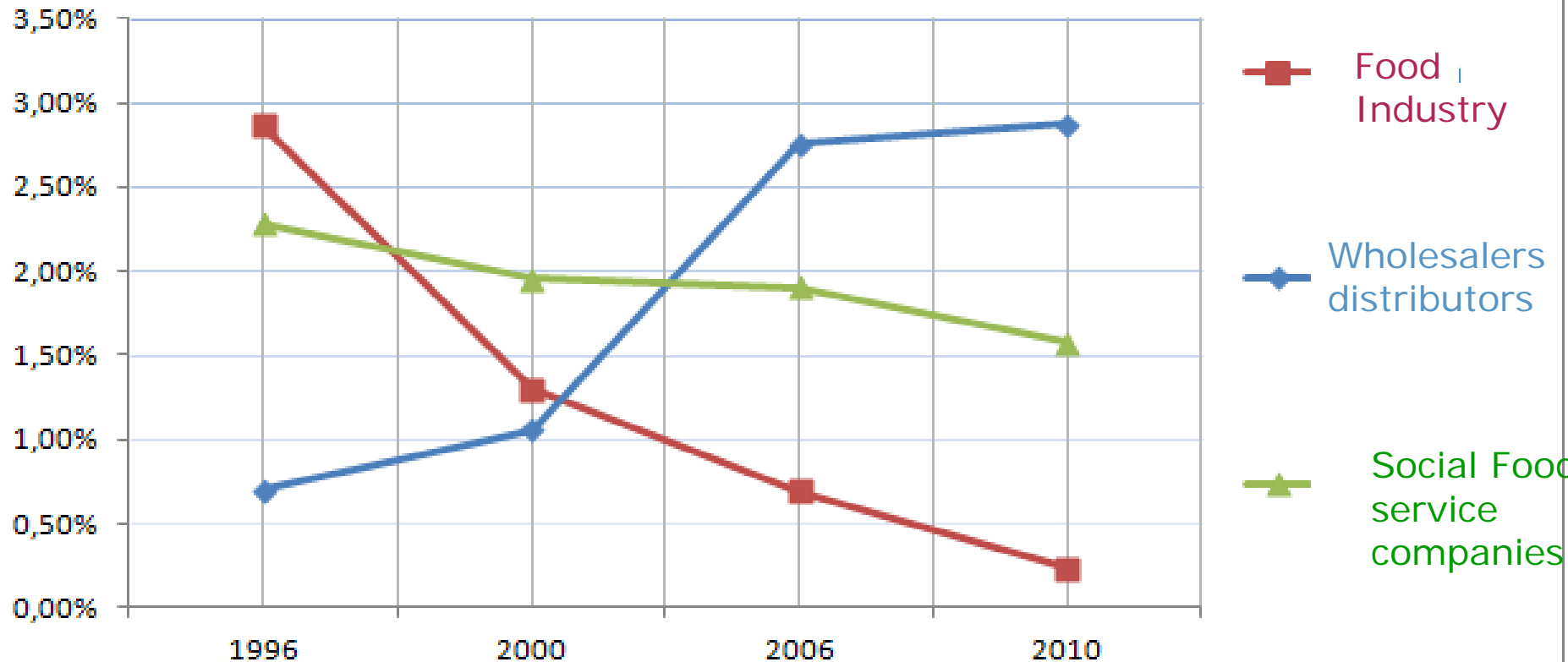
| <b>SOCIAL FOODSERVICES (IT)</b> | <b>1996 %</b> |        | <b>2000 %</b> |        | <b>2006 %</b> |        | <b>2010 %</b> |        |
|---------------------------------|---------------|--------|---------------|--------|---------------|--------|---------------|--------|
| Turnover                        | 585.940       |        | 1.108.708     |        | 1.728.296     |        | 1.678.029     |        |
| Food Consumption                | 224.253       | 38,27% | 392.709       | 35,42% | 575.237       | 33,28% | 525.531       | 31,32% |
| Labour Cost                     | 264.746       | 45,18% | 460.128       | 41,50% | 746.802       | 43,21% | 715.873       | 42,66% |
| Depreciation /Amm               | 24.337        | 4,15%  | 33.486        | 3,02%  | 54.481        | 3,15%  | 53.943        | 3,21%  |
| Added value                     | 358.621       | 61,20% | 545.923       | 49,24% | 848.614       | 49,10% | 826.657       | 49,26% |
| EBITDA                          | 31.874        | 5,44%  | 88.791        | 8,01%  | 100.792       | 5,83%  | 111.999       | 6,67%  |
| EBIT                            | 24.410        | 4,17%  | 68.216        | 6,15%  | 82.998        | 4,80%  | 76.203        | 4,54%  |
| Net Profit                      | 13.391        | 2,29%  | 21.688        | 1,96%  | 32.883        | 1,90%  | 26.397        | 1,57%  |
| Dipendenti n°                   | 16.088        |        | 28.212        |        | 39.659        |        | 36.660        |        |
| Costo Medio Dipendente          | 16            |        | 16            |        | 19            |        | 20            |        |
| Fatturato/Dipendente            | 36            |        | 39            |        | 44            |        | 46            |        |

In 15 Years the price of schools meals in Italy have not been increased : in parallel, food cost dropped from 38,7% to 31,32 % in ; Labour Cost from 45,18% to 42,66%

# Economical aspects of the Food supply chain in Italy

## Trend of Net Profit

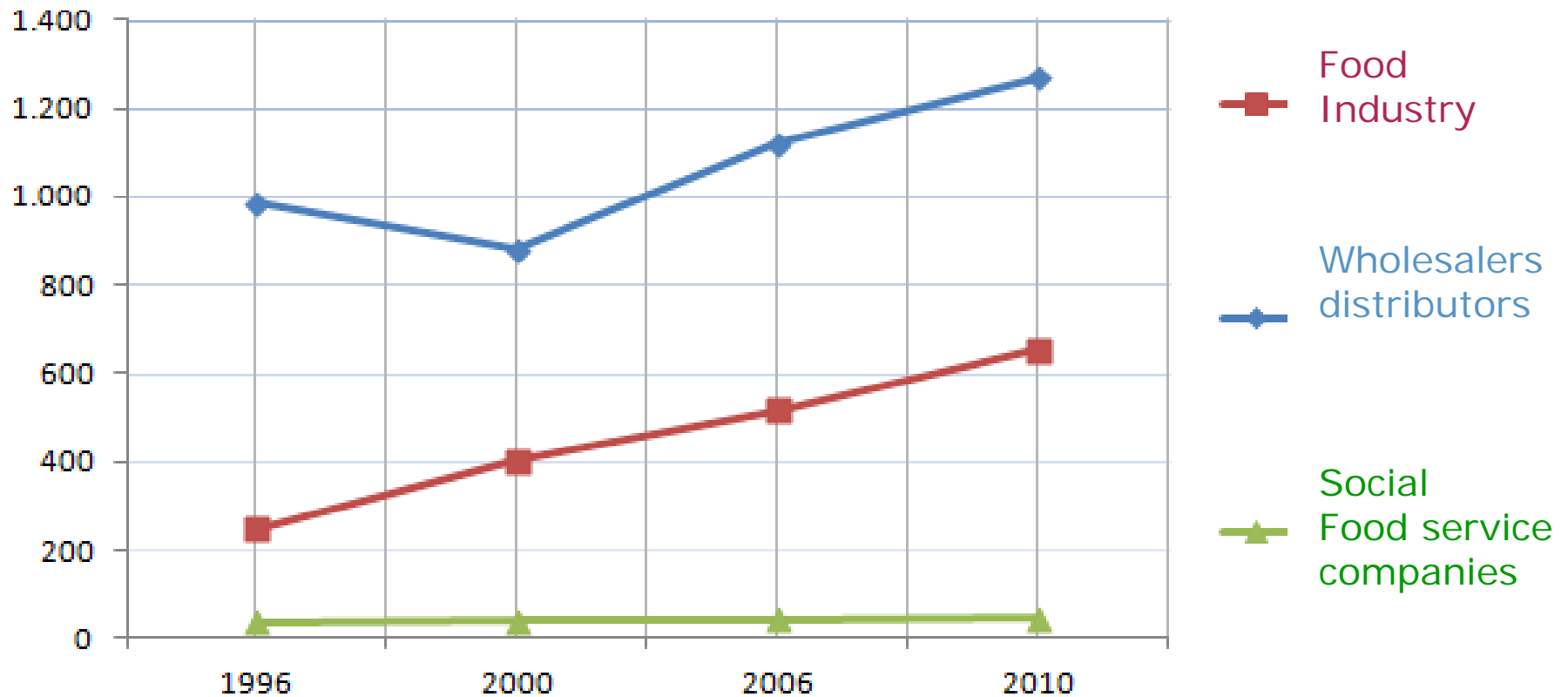
3 main segments of the agro-food supply chain data in % (sample in evolution)



# Economical aspects of the supply chain in Italy

## Annual Turnover/Workers

3 main segments of the agrifood supply chain data in /000 Euro (sample in evolution)



## The European F&B Market (Eu 27)

| Sector: in EU 27                              | Annual Turnover        | Workers      | Turnover/Workers |
|---|------------------------|--------------|------------------|
| <b>Food &amp; Beverage Industry (F&amp;B)</b> | € 954.000.000.000,00   | 4.200.000,00 | € 227.142,86     |
| <i>Large Company</i>                          | € 494.172.000.000,00   | 1.562.400,00 | € 316.290,32     |
| <i>SMEs</i>                                   | € 459.828.000.000,00   | 2.637.600,00 | € 174.335,76     |
| <b>Total Foodservices (Out of Home Cons.)</b> | € 468.000.000.000,00   | 7.316.000,00 | € 63.969,38      |
| <b>Total Social Foodservices (SFS)</b>        | € 77.000.000.000,00    | 2.200.000,00 | € 35.000,00      |
| <i>SFS Contracted</i>                         | € 24.623.000.000,00    | 600.000,00   | € 41.038,33      |
| <i>SFS Self Operated**</i>                    | € 52.377.000.000,00    | 1.600.000,00 | € 32.735,63      |
| Onboard Travel Foodservices                   | € 4.300.000.000,00     | 50.000,00    | € 86.000,00      |
| Other Food Consumption out of home            | € 386.700.000.000,00   | 5.066.000,00 | € 76.332,41      |
| <b>Home F&amp;B Consumption</b>               | € 882.000.000.000,00   |              |                  |
| <b>Total food consumption in Eu</b>           | € 1.350.000.000.000,00 |              |                  |
| <b>Organic "BIO" market value</b>             | € 18.400.000.000,00    | 1,36%        |                  |



## The shift of paradigm

SUSTAINABLE FOOD SYSTEM

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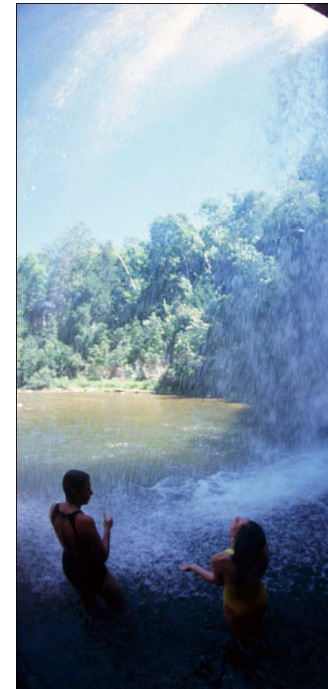
+ HEALTHY FOOD

+ LABOUR

- HEALTH COSTS

- WASTE

+ LIFE QUALITY



## The shift of paradigm

### In the past:

Business activity traditionally has been taking into account 3 different resources such as:

Financial, Technical and Human resources

### In the future:

Human labour must be put again at the center of economy

Environment must also be taken into account as the 4<sup>th</sup> limited resource...  
such as the first three ones

For a new agri-food supply-chain in symbiosis with the hosting territory.

## **In Conclusion**

**We invite you to join the network of Eating City,**

to participate to our workshops and conferences,  
to make concrete propositions for food policies.

[www.eatingcity.org](http://www.eatingcity.org)

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**Thanks  
for your attention**