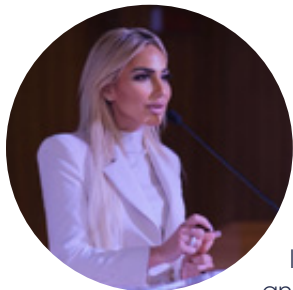


EHL INSIGHTS REPORT

Food and Well-being 2025

Forewords



ELISA ZAMBITO MARSALA

Intesa Sanpaolo places a central role on projects aimed at education and the cultural and civil growth of society. Supporting research, innovation and sustainability is one of the core elements of our business plan, deeply rooted in the ISP's history and way of operating. In a world of increasingly rapid change, we face global challenges driven by transformative trends such as Life Sciences, of which nutrition and health are key components.

In partnership with EHL, we are proud to present the Report on Food and Well-being 2025. This collaboration reflects our shared mission: to educate and empower young generations to promote a new, more conscious, and sustainable approach to food - one that enhances individual well-being, strengthens communities and supports the long-term health of our planet.



MARKUS VENZIN

At EHL, we don't just follow industry shifts, we actively shape them. Hospitality today extends far beyond service; it is a force for well-being, human connection, and above all, new working systems. In partnership with Intesa Sanpaolo, we are excited to present the EHL Insights Report Food and Well-being 2025, an in-depth analysis of the evolving relationship between nutrition and health seen through the prism of hospitality innovation for all its stakeholders.

As consumer awareness grows, the demand for healthy, sustainable and convenient food experiences is redefining the industry. This report explores the mindset needed to unlock new hospitality offers from personalized nutrition to responsible sourcing and innovative business models.

Like the ancient philosophers who saw food as central to well-being, we recognize nutrition as a powerful driver of both personal and societal health. In our AI-driven world, personalization and speed are - on the surface - reshaping consumer expectations but underneath the themes of belonging, connection and community remain fundamentals for a positive human existence.

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Contributors and acknowledgements



CO-AUTHORS

Nicola Gryczka Kirsch, Dr. Valentina Clergue

CONTRIBUTORS

We are grateful to have received active contributions from thought leaders in shaping selected chapters: Dr. Carlos Rios Martin on food waste under "The impact on food waste" and overall direction; Med. Dr. Anna Maria Schürner-Strassburg on health and well-being under "Eating for vitality"; Christine Gould on the future outlook under "A glimpse into the future".



EDITORIAL SUPPORT

Beatrice Venturini



RESEARCH ASSISTANCE

Dr. Ayaz Mukarram Shaikh

EXPERTS



Emlyn
Brown
SVP Well-Being, ACCOR



Michiel
Bakker
President and CEO, The Culinary
Institute of America (CIA)



Stefani
Bardin
Professor of AI & Food Design,
NYU and Founder of the Unstuck
Consultancy



Alexandre
Bastos
Head of Front-End Innovation,
Givaudan



Mark
Brand
Chef and Social Entrepreneur



Sara
Burnett
Executive Director, ReFED



Valeria
Calamaro
Marketing and Sustainability Manager,
Altromercato



Prof. Hellas
Cena
Professor of Clinical Nutrition, MD,
and Pro Rector for the Third Mission,
University of Pavia



Dr. Maggie
Chan
EHL Professor and Author



Dessislava
Dimitrova
Deputy to Head of Innovation and
Innovation Technical Officer, WHO



Olga
Donica
Longevity Innovation Director at
CLINIQUE LA PRAIRIE



Sophie
Egan
Author; Founder, Full Table Solutions;
Co-Founder, Climate Kitchen; Writer,
NYT Health



Mira
Elghaziri
Managing Director, HealthyPath



Susie
Ellis
Chair & CEO, Global Wellness Summit
and non-profit Global Wellness
Institute



Federico Francesco
Ferrero
Medical Doctor - Nutritionist - Food
Consultant - Food Journalist - Chef



Maisie
Ganzler
Author and Retired Chief Strategy
and Brand Officer, Bon Appetit
Management Company



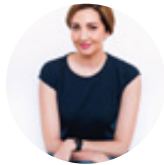
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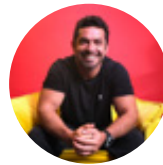
Michael
Gibbert
Adjunct Professor, EHL Group



Simone
Gibbertoni
CEO, Clinique La Prairie



Christine
Gould
Founder, TFF(Thought For Food) and
GIGA



Marcos Freire
Gurgel
Head of Innovation, IFood



Chavanne
Hanson
MPH, RD - Global Food Center of Excellence:
Food Choice Architecture, Nutrition and Global
Teaching Kitchen Lead, Google



Ana Gerlin
Hernández Bonilla Mabeck
MSc Nutritionist, Independent
Consultant, Founder of THE
NUTRIVERSE



Guilherme
Hilsdorf
Founder and CEO, MUDE



Christian
Hamerle
Head of Global Food Service
Transformation, Dussman Group



Dr. Marisa
Huebner
Holistic Health Doctor and Advisor
and Alliance Builder @ ProjectTogether



Kabui
Njathi
Chef, food designer, anthropologist
and writer



Erin
Kappelhof
Nutritionist and CEO of the food and
health consultancy Eat Well Global



Philipp
Kirnbauer
Director Project & Design,
Compass Group



Jennifer
Klar
Director of Corporate Sustainability, Six
Senses



Emilia
Konert
CEO, Cultifutura



Mike
Lee
Author and designer of Mise and
Food Futurist



Dr. Carlos
Martin-Rios
Associate Professor, EHL Group



EXPERTS



Charles
Michel
Chef, Food Educator and Author



Ian
Millar
Senior Lecturer, EHL Group



Denise
Monroy
Chef and Founder of Elektra Punk & Food and Pioneer in Plant-Based Gastronomy



Eva
Monterrosa
Program Lead Consumer Demand Generation, GAIN



Rania
Moualla
Founder, President and Chairwoman, ZADK



Paul
Newnham
CEO and Founder, Chefs Manifesto and the SDG Hub



Patrick
Ogheard
Dean EHL School of Practical Arts, EHL Group and Co-director, EHL Institute of Nutrition R&D



Malcolm
Omond
Senior Director, Workplace - Food, Health and Events, Google Asia Pacific, Singapore



Sonia
Re
CEO, Italian Chefs Association



Annie
Ryu
CEO and Founder, jack & annie's / The Jackfruit Company



Sara
Roversi
CEO and Founder, Future Food Institute



Dr. Med Anna Maria
Schürner Strassburg
CEO, Founder and leading medical doctor, ANNAlyse



Christina
Senn-Jakobsen
CEO, Swiss Food & Nutrition Valley (SFNV)



Omar
Shihab
Founder and General Manager, BOCA



Katie
Stebbins
Executive Director, Food & Nutrition Innovation Institute Dorothy R. Friedman School of Nutrition Science and Policy at Tufts University



Dr. Marc
Stierand
Associate Professor, EHL Group



EXPERTS



Maristella
Sodre
Sustainable Gastronomy Chef



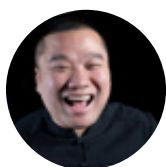
Gunhild Anker
Stordalen
CEO and Founder, EAT Foundation
and EAT Lancet Report



Eve
Turow-Paul
CEO and Founder, Food for Climate
League and Author



Jane
Upritchard
Global Director of Nutrition, Health &
Well-being, Compass at Google and
advisor



Franklin
Yao
CEO, YouKuai Group and Founding
Partner, SmithStreetSolution China



Executive summary

The Food and Well-being 2025 Report explores the intersection of food and well-being, an important area currently shaping the future of the hospitality industry. This report analyzes emerging consumer behaviors and actionable strategies to help hospitality players align their operations with evolving market dynamics while promoting health, sustainability and community engagement.

SIX OVERARCHING TRENDS SHAPING FOOD AND WELL-BEING HAVE BEEN IDENTIFIED



KEY FINDINGS

FOOD AS THE CORNERSTONE OF WELL-BEING

Food has evolved far beyond its traditional role as a source of sustenance. Once viewed primarily as a means to satisfy hunger and later as a status symbol, food now touches nearly every layer of Maslow's hierarchy of needs. It nurtures not only the body but also mental health, a sense of community and supports planetary well-being, enabling the balance between human prosperity and the health of earth's ecosystems. The concept of Food Well-Being (FWB) captures this multifaceted impact, highlighting food's role in bringing pleasure, purpose, health and sustainability into daily life.

CONSCIOUS CONSUMER SHIFT

Driven by heightened post-pandemic awareness and access to information, consumers today are more informed than ever and are increasingly prioritizing health, transparency, as well as sustainability in their food choices. This shift is shaping new expectations and offers for the hospitality industry, from personalized nutrition to plant-forward menus and tech-enhanced dining experiences. A growing number of consumers seek food that is healthy and adjusted to their personal needs while still being convenient and quick.

HOSPITALITY'S ROLE FOR WELLBEING

The industry is positioned and expected to influence well-being at multiple levels. Through innovative practices like nature dining emersions, planetary diet offers, social eating initiatives or even just small shifts in their existing offering, hospitality providers can create environments that support both hedonic (pleasure-driven) and eudaimonic (purpose-driven) well-being. In recent years, chefs have taken a prominent role in these efforts, but everyone in the business, from line cooks and servers to management, has an important part to play. This highlights the growing importance of cross-disciplinary, continuous education to meet these expectations effectively.

CHALLENGES AND OPPORTUNITIES

While the rise of the conscious consumer signals progress, it also presents challenges, such as the increased spread of misinformation, addressing systemic inequalities in access to healthy food and navigating the complexities of sustainable food sourcing. Innovations in technology and education, alongside stronger commitments to shared responsibility, offer pathways to address these issues. The report highlights that achieving meaningful impact will require collaboration across sectors, embracing diverse perspectives and scaling innovative solutions to create more equitable and sustainable food systems.

OPPORTUNITIES FOR STAKEHOLDERS

HOSPITALITY BUSINESSES

Embrace transparent practices and collaborations with innovators nutritionist and local communities to build trust and resilience.

CHEFS AND OPERATORS

Lead through culinary innovation and flavor, advocating for nutritious and sustainable options without compromising on taste, enjoyment or experience.

POLICY MAKERS AND EDUCATORS

Develop frameworks and curricula that align with the principles of well-being, sustainability and equity in food systems.

This report shines a spotlight on the hospitality industry's potential to serve as a catalyst for positive change, creating connections that benefit individuals, communities, as well as the planet. By integrating these insights, hospitality players can navigate the shifting landscape of food and well-being with a clear vision for a healthier, more sustainable future.



Glossary

Conscious consumers: Individuals who prioritize products and services that promote sustainability, health and social fairness, while expecting brands to demonstrate transparency, authenticity and accountability.

Eudaimonia: The realization of one's purpose and potential, focusing on personal growth and fulfillment.

Food literacy: The drive to utilize nutrition knowledge when making food-related decisions.

Food well-being: A perspective that views food as more than just nourishment, emphasizing its role in providing comfort, joy, social connection and identity.

Health: The state of physical well-being and the absence of illness.

Hedonia: The experience of positive emotions associated with pleasure and the reduction of pain.

Hospitality industry: Businesses dedicated to offering services related to food and beverage, accommodation and complementary services like recreation and entertainment to guests. In this report, when referring to hospitality we encompass restaurants, cafes, catering services, food delivery and hotel food outlets.

Life satisfaction: The overall perception of quality across different areas of life.

Nutrition: The intake of substances essential for nourishing the body.

Planetary well-being: Fostering a harmonious balance between human prosperity and the health of the Earth's ecosystems.

Plant-forward diet: Flexible eating, emphasizing a variety of plant-based foods (e.g., vegetables, fruits, grains, legumes, nuts) while not necessarily eliminating animal products. It prioritizes plants while allowing moderate inclusion of meat, dairy or fish.

Planetary diet: A science-based diet developed by the EAT-Lancet Commission that balances human nutritional needs with the Earth's ecological boundaries. Predominantly plant-based foods but it allows limited consumption of animal products to reduce environmental impacts while ensuring global food security.

Plant-based diet: Consisting entirely or mostly of plant-derived foods. Although it can include small amounts of animal products in some interpretations, many associate it with strictly vegan or vegetarian approaches.

Sustainable diets: Diets that are healthy, safe, nutritionally adequate and environmentally sustainable.

Social eating: Sharing meals with others to encourage connection and build community.

Sustainable development: Meeting current needs while ensuring future generations can meet theirs.

Well-being: A state of experiencing positive feelings and having a meaningful life by fulfilling one's potential.

Wellness: The active pursuit of healthy habits and practices.

Wellness economy: Businesses that empower individuals to integrate wellness activities and lifestyles into everyday living.

Introduction

In a world marked by rising health awareness, environmental challenges and shifting cultural expectations, food has become more than a source of sustenance or pleasure; it is a vehicle for health, connection and purpose. Today, there is a demand for food that supports people's well-being, reflecting a societal wave toward holistic health and planetary well-being. Businesses that prioritize well-being through food offerings are well positioned to meet evolving consumer demands.

The hospitality industry is positioned to play a central role in this transformation. As a global touchpoint for millions of individuals daily, it has the power to shape food systems and advocate practices that enhance holistic well-being. By embracing this role, hospitality businesses can drive growth and innovation as well as make meaningful contributions to society.

By examining consumer behaviors and innovative practices, this report aims to provide insights for hospitality stakeholders and emphasize the importance of integrating well-being into food strategies, not merely as a trend to follow - but as a core principle for driving long-term impact.

We chose to adopt a positive psychology perspective on food and well-being, encompassing both **hedonia** and **eudaimonia**. Hedonia is reflected in the emotional and sensory pleasure derived from eating, whereas eudaimonia refers to health-related objectives, meaningful connections and the sense of purpose individuals find in their food choices.

We hope that you find the information in this report beneficial and inspiring. We also hope that it encourages you to apply some of the learnings to your own operation and practices. Thank you for joining us on this mission to promote well-being and create a healthier, regenerative community.





Objectives and methodology



METHODOLOGY

This report is grounded in extensive research and draws on 53 in-depth, semi-structured interviews with diverse experts in hospitality, well-being and nutrition, secondary data analysis and a collection of case studies of hospitality venues and pioneering innovators. Experts were selected based on their thought leadership, diverse perspectives, geographic representation and a balanced mix of sectors, including academia, industry and innovation leaders. This approach allows the report to provide diverse insights across hospitality and food innovation by combining theoretical frameworks with practical, real-world examples.

This report identifies emerging best practices and highlights the evolving behaviors of consumers in various contexts. While a comprehensive literature review provides essential historical insights and theoretical grounding, the expert interviews offer real-time perspectives on industry trends and the global case studies showcase on-the-ground solutions and innovative practices. Together, these varied viewpoints make the findings relevant and actionable, equipping industry stakeholders with credible and practical guidance to promote well-being and food innovation in hospitality.

SCOPE

In examining food-related trends and consumer behaviors, our report primarily adopts the client lens of hospitality, focusing on consumers with purchasing power and access to hospitality outlets. This perspective, while relevant for industry players, inherently excludes important groups such as industry employees, whose well-being deserves their own dedicated study. Moreover, this report does not have the scope to sufficiently address the systemic inequalities that leave millions of people worldwide unable to access adequate nutrition. These limitations remind us that while trends in hospitality offer valuable insights, they represent only a part of the larger, more complex global food system landscape.

As we continue to build on this work, we remain committed to broadening the scope of future reports, incorporating diverse perspectives and addressing the broader systemic challenges surrounding well-being.

TARGET AUDIENCE AND OBJECTIVES

This report is crafted for leaders in the global hospitality industry, from independent restaurateurs and hotel operators to large-scale food service players, as well as related stakeholders such as educators and policy makers. It is designed to provide value to everyone involved in hospitality establishments, regardless of their role or geographical location, offering a wide range of diverse insights and examples.

Hospitality stakeholders responsible for shaping food, well-being and sustainability strategies, or making critical decisions in these areas, will find the report particularly beneficial. The primary aim is to show the rapidly evolving landscape of food and well-being within the industry, presenting current and future trends, opportunities and innovations.

The layout was designed such that key information is summed up as downloadable infographics and summaries for quick reads and collapsible sections that expand or reduce the text depending on what is of most interest. Readers can select the most relevant sections for their specific needs, ensuring that insights are practical and adaptable to their contexts.

By providing observations into emerging industry practices and consumer expectations, the report hopes to inspire and inform industry players by equipping them with the tools and knowledge needed to adapt to the current changing environment. **More importantly, it seeks to serve as a catalyst for change, encouraging hospitality businesses to transition toward a stronger focus on well-being through their food offerings and outlets.**

With this collaborative approach, we aim to support the hospitality industry in this essential transformation, one that not only meets consumer demands but also champions a broader vision of health, sustainability and connection within our shared global food ecosystems.

This inaugural EHL report on well-being focuses specifically on the role of food, acknowledging its centrality to well-being and profound impact on people and communities. Well-being is a multidimensional concept that extends beyond food, encompassing mental, physical, social, spiritual and environmental pillars. Future studies will explore these broader dimensions to provide a holistic view of well-being within the hospitality industry.





Part 1.

Food and well-being within hospitality



WHAT EXACTLY IS 'WELL-BEING'?

The concept of well-being has been explored across multiple disciplines such as philosophy, economics, public health and psychology^[1]. Indeed, academic scholars generally agree that well-being is a multidimensional construct^[2-4]. It is often equated to related notions such as wellness, health and quality of life, underlining its complex and multifaceted nature. In psychological contexts, well-being extends beyond physical health to encompass a broader spectrum of positive functioning^[5].

Well-being has been examined through three primary lenses: **hedonia**, which focuses on positive emotions and happiness; **life satisfaction**, based on subjective evaluations of one's life quality; and **eudaimonia**, emphasizing a meaningful life and the realization of human potential^[6-9].

From a hedonic standpoint, well-being is achieved through the presence of positive emotions linked to pleasure and the minimization of pain^[10]. Life satisfaction considers perceived quality across various life domains^[9], while eudaimonic well-being highlights self-realization, purpose and the fulfillment of one's potential^[8,11].

The relevance of well-being cuts across numerous life areas, impacting health, family and work environments^[12,13]. Specifically, well-being leads to greater productivity in the workplace, more effective learning, increased creativity, more prosocial behaviors, more positive relationships and better overall health, thus reducing healthcare costs. While genetics play a role in well-being^[17], environmental and situational factors are often equally, if not more, influential^[7,10].

By addressing key issues related to long-term well-being, policymakers can establish frameworks to improve health outcomes and promote environments that encourage healthier lifestyles within more sustainable communities. Indeed, we argue that prioritizing well-being is not just a personal goal but a societal necessity, influencing everything from workplace cultures to consumer preferences in industries like hospitality.

WELL-BEING AND HOSPITALITY

In recent years, well-being has emerged as a crucial societal concern, representing the desire for a holistic approach to living, where the overall quality of life across various dimensions is now becoming a priority. The global wellness economy, which was valued at \$5.6 trillion in 2022, is projected to surge to nearly \$9 trillion by 2028^[18]. This trend is particularly prominent among Gen Z and millennial consumers, who are increasingly investing in wellness products and services across various domains such as health, fitness and mindfulness^[19]. The wellness economy is now nearly 60% the size of global health expenditures, which were estimated at \$10.6 trillion in 2023^[18].

Travel and tourism inherently provide an opportunity to break away from fast-paced routines with enhancing well-being at destinations increasingly becoming a primary purpose of travel. Every hospitality actor plays a vital role in this, as promoting guest health and well-being also leads to numerous advantages for the employees and business performance.

Previous research has explored how various hospitality activities impact well-being, distinguishing between hedonic and eudaimonic well-being. For instance, high-quality aesthetics, beauty treatments and entertainment experiences tend to boost guests' immediate positive emotions i.e., hedonic well-being^[20-22]. On the other hand, activities that involve learning, mindfulness or adventure often enhance a sense of achievement and overall life satisfaction i.e., eudaimonic well-being^[23-25].

Research also shows that when guests experience improved well-being, they hold more positive attitudes toward the hospitality provider, are more satisfied with their stay and are more likely to recommend and revisit the destination^[26-32].

WELL-BEING AND FOOD

Food plays a key role in the hospitality offering that goes beyond a basic focus on nutrients. Food represents a broader, more integrated element of well-being, connecting individuals to their communities, traditions and values^[33]. As a deeply social and cultural entity, food represents togetherness and a sense of belonging, linking people to farmers, the land and cultural roots. These attitudes are part of an evolving focus on holistic well-being, where consumers are increasingly connecting physical, mental and emotional health with their food choices.

FOOD WELL-BEING

Supporting this perspective, the concept of Food Well-Being (FWB) has emerged as a framework for understanding food's multifaceted role in people's lives^[33]. Traditionally, food has been viewed through the lens of nutrition and physical health. However, these aspects fail to capture food's wider, holistic contributions to well-being^[33, 34].

FWB offers a comprehensive view, highlighting that food is not merely a substance but also a source of comfort, pleasure, community and identity^[33]. This paradigm shift encourages moving away from restrictive dietary approaches toward more inclusive, holistic frameworks that enhance well-being and incorporate the positive, multi-dimensional nature of food consumption.

HEDONIC WELL-BEING

In the context of hedonic well-being, food is often viewed as a source of sensory pleasure and enjoyment, offering rich opportunities for individuals to engage with their senses^[34]. This approach is rooted in the pursuit of pleasure through the multisensory experience of eating. According to it, a person experiences well-being through the vibrant colors and aromatic scents encountered in markets, the tactile satisfaction of preparing ingredients and the sounds of food simmering or sizzling. This immersion into the sensorial aspect of food is enhanced when shared with others, leading to feelings of relaxation, joy and companionship^[34]. The hedonic aspect of food well-being is all about the value of momentary pleasure and sensory fulfillment linked to the emotional experience of eating.

EUDAIMONIC WELL-BEING

The eudaimonic perspective on food well-being encompasses a more mindful, purposeful engagement with food that promotes personal growth, autonomy and sustainability^[34]. This form of well-being extends beyond immediate sensory pleasure, emphasizing the value of meaningful, intentional interactions with food, from selecting locally sourced ingredients to growing one's own produce^[34]. Such activities enable consumers to connect with the origins of their food and thus create a sense of authenticity and intentionality.

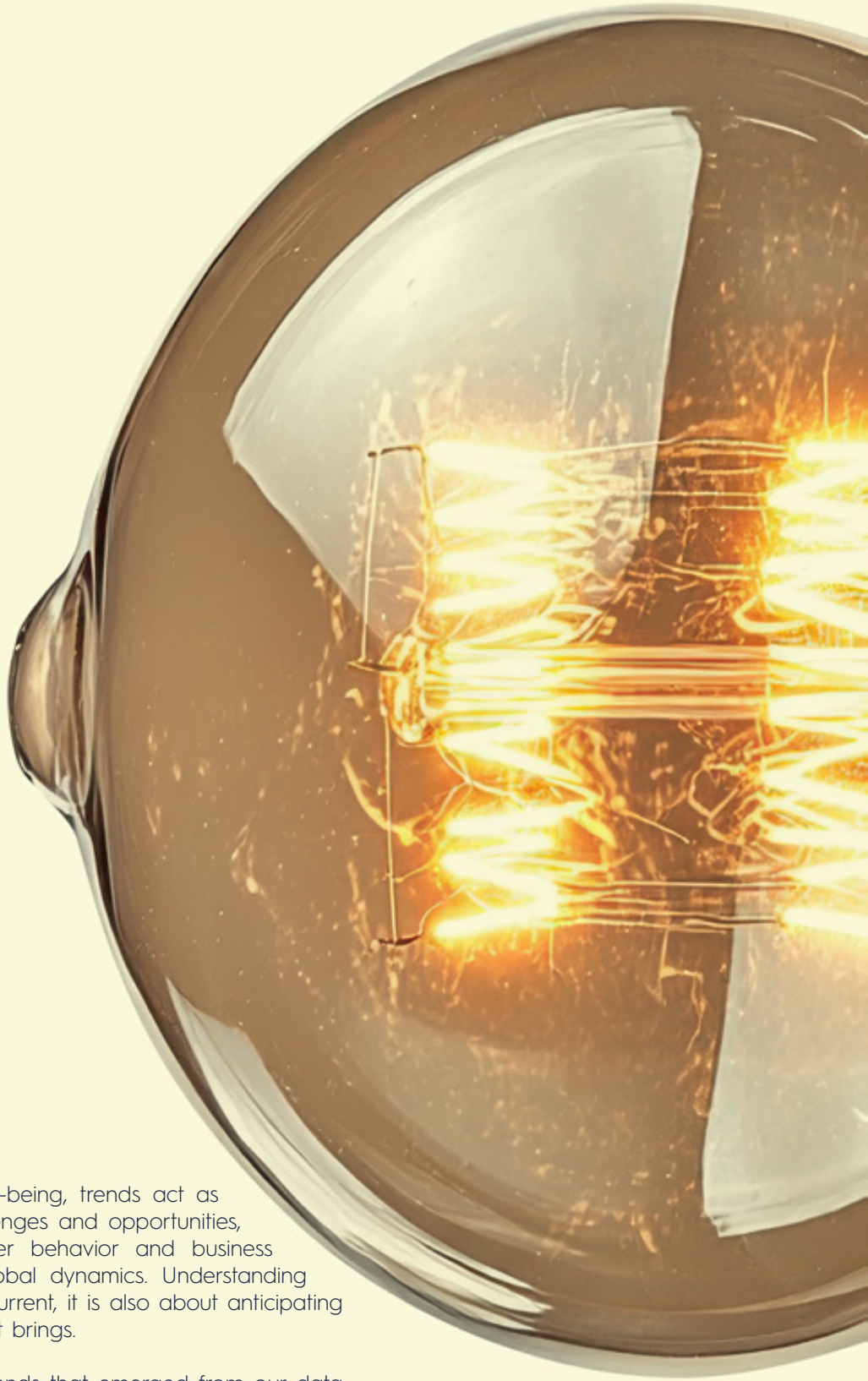
Preparing food, whether by following a recipe or improvising creatively, cultivates a sense of achievement and mastery that enhances well-being. Additionally, a commitment to sustainable practices, such as reducing food waste and using renewable resources, reflects a virtuous approach that aligns personal values with actions, furthering a sense of responsible satisfaction^[34]. Eudaimonic well-being is also found in shared experiences based on companionship and gratitude. These various approaches to food well-being are part of a mindful engagement that provides a deeper, more fulfilling sense of life satisfaction.

FOOD – THE CORNERSTONE OF HOLISTIC WELL-BEING

To conclude, food transcends its basic function as nutrition to become a cornerstone of holistic well-being, connecting people to their physical health, emotional satisfaction and cultural identity. Whether through the sensory pleasures of hedonic well-being or the purposeful practices of eudaimonic well-being, food is key to a sense of community, fulfillment and sustainability.

By embracing a multidimensional understanding of food well-being, individuals and industries alike can prioritize practices that develop personal health alongside collective and planetary well-being. This integrative perspective provides the basis for responding to societal shifts and emerging trends that continue to reshape our relationship with food.





Part 2.

Trends

In the realm of hospitality and well-being, trends act as indicators of emerging values, challenges and opportunities, offering a lens into how consumer behavior and business practices evolve in response to global dynamics. Understanding trends is not merely about staying current, it is also about anticipating change and seizing the possibilities it brings.

In this section, we explore six key trends that emerged from our data analysis shaping the future of food and well-being which are already affecting the industry. The interview analysis revealed sub-trends leading to the creation of distinct subsections within each trend.



TREND No. 1

RISE OF THE CONSCIOUS CONSUMER: AWARENESS AND CONFUSION

The rise of the more consciously aware consumer is one of the most defining trends of our time. This shift has been accelerated by several key factors, notably, the COVID-19 pandemic, digitalization and the influence of social media. These factors have resulted in consumers today being more informed and actively seeking out products and services that align with their health priorities and ethical goals. However, as experts emphasize, the conscious consumer landscape is not homogeneous; it varies significantly based on demographics, access to information and socioeconomic factors.

In this report, we define a conscious consumer as someone who takes an intentional and informed approach to their purchasing decisions, prioritizing products and services that align with values. Conscious consumers seek transparency from brands, value authenticity and favor offerings that promote well-being for both people and planet. They often make choices that reflect longer-term thinking, focusing on quality, environmental impact and social equity. This consumer group integrates their values into everyday decisions and expects businesses to demonstrate accountability and alignment with these principles.

POST-PANDEMIC FOOD ATTITUDES

The COVID-19 pandemic has acted as a significant catalyst for the rise in consumer awareness of health and well-being. With widespread disruption to food supply chains, heightened concerns over health and a newfound focus on local sourcing, consumers have begun to prioritize more sustainable and transparent food choices^[35].

Prof. Dr. Hellas Cena from the [*University of Pavia*](#) observes that the pandemic had a dual impact with some individuals adopting healthier habits due to more time for self-care, while others suffered worsened health due to stress, lack of movement and increased consumption of comfort foods. Food writer and activist, Eve Turow-Paul, notes that many consumers turned to food as a means of coping with the emotional stress of the pandemic, using it to fulfill needs linked to safety and community.

"The COVID pandemic influenced dietary patterns significantly. Some people worsened their diets and gained weight, while others improved their eating habits and embraced healthier lifestyles. The outcomes were often shaped by individual resilience and fragility."

Prof. Dr. Hellas Cena, Professor of Clinical Nutrition, University of Pavia

Additionally, the pandemic heightened awareness of the fragility of the global food system, exposing vulnerabilities in supply chains and highlighting challenges in ensuring consistent access to safe, nutritious food. Issues such as food security, supply chain transparency and environmental sustainability became more prominent, pushing consumers to rethink their food choices in terms of both personal health and global impact.

The way we eat is now recognized as a critical factor not just for physical health, but also for mental well-being and the planet's resilience.

These three dimensions — health, mental and planetary well-being — are inextricably linked, with supply chain disruptions pointing to the urgent need for transparent and equitable systems. As consumer awareness grows, so does the demand for food systems that address these interconnected challenges holistically.



DIGITALIZATION AND SOCIAL MEDIA

The digital age has empowered us with unprecedented access to information about food, health and well-being. Social media platforms like Instagram, YouTube and TikTok have become key channels for disseminating food-related 'knowledge'. However, while this easy access has informed many consumers, it has also led to confusion due to the abundance of conflicting or misleading claims.

“Anyone on social media can claim they are a health specialist with tremendous consequences.”

Med. Holistic Health Doctor and Advisor and Alliance Builder @ ProjectTogether

Consumers find themselves overwhelmed by the flood of information available, especially on social media, where a mix of valid and questionable sources make it difficult to distinguish fact from fiction. The recent explosion of longevity and wellness content has paradoxically left many consumers feeling more confused about what constitutes healthy and sustainable eating. The need for clear, evidence-based guidance is greater than ever.

This complexity has led many consumers to turn to smaller, niche communities, often referred to as 'food tribes', for guidance^[36]. These groups rally around specific diets, such as keto, veganism or paleo, offering individuals a sense of identity and purpose in navigating the overwhelming amount of information^[37]. However, food futurist Mike Lee points out that the rise of these food tribes has also contributed to a fragmentation in food consumption patterns. While they provide clarity and community for some, these tribes risk becoming echo chambers where misinformation can spread, particularly concerning the health impacts of certain dietary choices.

Simultaneously, social media influencers have played a pivotal role in shaping consumer behavior, often guiding trends such as plant-forward eating or sustainable consumption. **This makes the role of trusted voices, such as chefs, credible food industry leaders and nutritionists evermore important in guiding consumers toward better food choices.**

FROM AWARENESS TO CONSCIOUS CONSUMPTION

While the era of the conscious consumer is well underway, the intention to eat healthier and more sustainably does not always translate into action. At the time of purchase, factors such as price sensitivity, taste preferences and habit often override these intentions, pulling consumers back toward familiar choices. This reflects a broader trend of **"conscious but conflicted"** consumers who genuinely value sustainability but still prioritize immediate, tangible benefits over altruistic goals.

“The overload of conflicting information often complicates the decision-making process for consumers and so they end up sticking to what they know and are familiar with.”

Patrick Ogheard, Dean EHL School of Practical Arts, EHL Group

Franklin Yao, CEO, YouKuai Group, points out that this conflict is particularly evident in China^[38]. Chinese consumers are increasingly aware of the impact of food on health, with growing demand for healthier options, particularly after COVID-19^[39,40]. However, modern desk-bound jobs and economic challenges are pushing many toward cheaper, less healthy diets, worsening the country's weight problem and leaving sustainability behind^[39].

“There's growing awareness around personal health in China, but sustainability remains a low priority unless driven by government policy.”

Franklin Yao, CEO, YouKuai Group

Despite such challenges globally, a gradual shift is underway with more consumers making purchasing and dining decisions that reflect health-oriented and sustainable values^[41]. This transition is expected to accelerate as affordable, sustainable options become more accessible, bridging the gap between intention and action; a shift that will directly impact the hospitality industry. EHL professors have observed a shift in customer values, driving hospitality institutions toward more eco-friendly and sustainable practices, as highlighted in the [EHL Insights Report: Hospitality Outlook 2025](#).



YOUNGER GENERATIONS DRIVING CHANGE

The influence of younger generations on the conscious consumer trend is undeniable. Gen Z and Millennials are not only prioritizing health and ethics in their food and dining choices, but are also more adventurous in exploring new and innovative food offerings, e.g., novel ingredients, lab-grown meat, 3D printed foods etc. This openness to diverse flavors and alternative ingredients presents unique opportunities for hospitality businesses to innovate, creating menus that cater to health-focused and environmentally conscious preferences. The trend, detailed in a research project by [Mintel](#) (2024) and the [World Economic Forum](#) (2023) shows that next-gen consumers are driving demand for restaurants and food outlets to feature sustainable ingredients, transparent sourcing and clear labeling practices^[42, 43].

"We have five generations alive simultaneously, meaning there's no 'one consumer'—diversity and complexity are the trends of the future."

Christine Gould, founder of TFF and GIGA

Next-gen consumers are also open to embracing digital and tech-driven dining experiences, like QR code menus detailing ingredient origins or AI-curated meal suggestions based on dietary preferences. This tech-savvy approach aligns with their familiarity to digital information, which shapes how they view and choose food options^[44, 45]. Consequently, food outlets that provide accessible information on nutrition, origin and environmental impact will appeal strongly to this demographic and other digital-friendly consumers, strengthening brand loyalty and trust.



TRANSPARENCY, TRUST AND LOYALTY

According to research^[e.g., 46], as consumer awareness of health, safety and sustainability has grown, the hospitality industry needs to adapt its operating practices to meet these demands. Post-pandemic, there is a heightened focus on safety and sustainable practices which have been essential in rebuilding consumer trust on all levels of society. Using certifications like organic, fair trade and regenerative farming, labels can help provide clarity on the ethical impact of the food they are consuming^[47]. Clear and transparent communication about sourcing and sustainability enhances the dining experience by helping consumers feel good about their choices.

"Traceability and transparency in food sourcing are no longer nice-to-haves—they're must-haves."

Ian Millar, Senior Lecturer, EHL Group

A [study](#) from Purdue University states the importance consumers place on knowing where and how their food is produced, which has encouraged companies to be more forthcoming with details on ingredient sourcing, sustainable practices and production standards^[48].

According to [Deloitte](#) (2021), transparency allows companies to not only meet consumer expectations but also encourage lasting loyalty, as 72% of consumers report being more likely to trust brands that provide clear information about their sourcing and production processes.

This approach has additional benefits for food safety, allowing for faster traceability in cases of contamination which reassures consumers regarding product safety. [The Center for Food Integrity](#) highlights that this transparency meets the growing consumer desire for insights into food safety, sustainability and ethical practices, making it a vital component for many returning customers^[49].

But while consumers demand more transparency from food companies, they often find it difficult to verify whether brands are truly living up to their sustainability and health claims. Terms like "organic," "natural," or "sustainable" are sometimes used loosely without clear regulations or certifications, leaving consumers uncertain about the level of authenticity.

TECHNOLOGY TO ENHANCE TRANSPARENCY

Recent technologies can offer some robust solutions to enhance transparency in food sourcing and production, helping to build consumer trust. Blockchain, for example, creates an immutable digital ledger where every transaction, from farm to table, is recorded and can be traced in real-time. This means that consumers and stakeholders can track each step of the food journey, from sourcing and processing to distribution, verifying claims about origin, organic status or ethical practices.

Other technologies, like IoT sensors, further support transparency by providing real-time data on environmental conditions (e.g., temperature and humidity) during transportation and storage. These insights assure consumers about food quality and authenticity, making it easier to confirm that products meet sustainability standards.

This shift is influencing the hospitality industry at all levels, from fine dining to casual eateries. Food outlets that adapt by promoting transparency and sustainability find it easier to attract not only younger customers, but also stand out as forward-thinking, responsible brands. Ultimately, the next generation's emphasis on health, sustainability and willingness to try new foods is catalyzing a society-wide transformation, challenging traditional food service norms and setting new standards for ethical, innovative dining experiences.

THE SOCIO-ECONOMIC DIVIDE

How well-positioned you are to acquire the food you need and want is an important question, however, in this report, we focus primarily on consumers with the purchasing power to choose higher-quality food options when desired. Delving into the various consumer segments in detail may follow at a later point.

Chef and social entrepreneur, Mark Brand, highlights a growing divide in consumer access to quality food, with well-educated consumers seeking wholesome ingredients while many others, due to cost-constraints and mass marketing, rely on cheaper, ultra-processed options. This divide correlates with the diminishing middle class and increased food insecurity, where rising food costs lead certain consumers towards unhealthy food choices.

According to the 2023 edition of the State of Food Security and Nutrition in the World [report](#), between 691 and 783 million people faced hunger in 2022, an alarming increase of 122 million compared to 2019. [The Food and Agriculture Organization \(FAO\)](#) defines food insecurity as not just a lack of dietary energy but also uncertainty about food access or the need to compromise on food quality and quantity. Even moderate food insecurity can result in malnutrition with serious health consequences.



CASE SINISANA

[Sinisana Technologies](#),^[50] established in 2019, uses blockchain to enhance supply chain transparency for brands. Their platform enables consumers to access detailed, verifiable information about product origins, creating trust and supporting sustainable practices. By integrating multiple data streams across the supply chain, Sinisana allows brands to substantiate their claims with real-world data, strengthening brand equity and building long-term consumer loyalty.

On a more positive note, research^[e.g.,51] shows that less privileged consumers are gaining awareness and have more access to information on the impact of their food choices, despite not always being able to secure the food they need. Several renowned chefs and food specialists are targeting the low-income bracket with affordable, healthy eating options in an aim to bridge the socio-economic divide. For example, Jamie Oliver initiatives, "[Ministry of Food](#)" and "[Money Saving Meals](#)" offer tips and resources on how to prepare nutritious meals on a budget. Similarly, Roy Choi and Daniel Patterson, founders of the fast-food chain, [Locol](#), provide quick, healthy meals in low-income communities.

Many of these initiatives aimed at developing equity in food systems or food literacy programs also emphasize food and cooking education in schools, especially those in underserved areas, as a way of reaching the younger generations with **positive messages about the simplicity of healthy eating**. These initiatives have demonstrated measurable success in directly improving food literacy and promoting healthier eating habits. For instance, [the NEST program in Australia](#) has significantly boosted participants' confidence in cooking, enhanced their nutrition knowledge and increased their intake of vegetables while reducing consumption of sugary drinks and salty snacks^[52].

By equipping individuals, especially those from underserved communities, with practical skills and a deeper understanding of nutrition, such programs help address systemic barriers to food security and encourage long-term behavioral change. These examples highlight how targeted food literacy interventions by food service providers can empower communities and promote equitable access to healthier food choices.

It is interesting to observe that lower income individuals have demonstrated a considerable improvement in health awareness^[53, 54]. This demand for health-conscious options is no longer limited to niche markets. Increasingly, different groups of consumers are looking for food choices that align with their desire to improve general health. Concepts such as 'food as medicine' and mood-boosting meals are being embraced by a wide array of consumers who are focused on both their well-being and long-term health goals ([see more in trend no.4](#)).

The rise of the conscious consumer is a pivotal opportunity for hospitality businesses to align with evolving guest priorities like **transparency, health and sustainability**. By embedding these values into their operations, the industry stands to drive meaningful change while encouraging guest loyalty and long-term relevance.



"Health has become a status symbol, but it shouldn't be reserved for only those who can afford it."

Eva Monterrosa, Program Lead Consumer Demand Generation, GAIN

INDUSTRY RECOMMENDATIONS

Behavioral nudges: Use menu design to subtly guide guests toward healthier options by enhancing their visibility.

Certifications: Use reliable certifications and adopt clear labeling to support sustainability claims and build consumer trust.

Consumer engagement: Foster open communication with consumers to understand their desires, preferences and unmet needs, using their feedback to shape offerings and enhance the guest experience.

Innovative food ingredients: Experiment with less familiar, innovative ingredients and make subtle menu changes to observe guest reactions and preferences.

Tech integration: Test technologies such as QR codes or blockchain to display nutritional value, ingredient origins and other relevant information.





TREND No. 2

CONVENIENCE MEETS PERSONALIZATION: REDEFINING THE GUEST EXPERIENCE

As we look to the future, three directly related trends define consumer expectations in the food service industry under the lens of eudaimonic well-being: personalization, experience and the enduring demand for convenience at the same time. Today's consumers want food that caters to their unique preferences and health goals while offering an engaging experience.

However, this demand for personalized and immersive food experiences is balanced by the need for efficiency and convenience. The successful integration of these trends will shape the future, influencing how businesses respond to evolving consumer desires.

Following the pandemic, the emphasis on convenience and enhanced customer experiences has become crucial in driving consumer pleasure and loyalty. Improved customer experiences, particularly those resulting from technological advancements and personalized services, are highly associated with higher levels of satisfaction among returning consumers^[55-57]. As supported in the EHL Insights , guest experiences are enhanced through personalization. For example, by leveraging data analytics, guest profiles and AI-driven technologies, personalized recommendations for dining can be effectively delivered.

PERSONALIZED NUTRITION

As consumers are continuously prioritizing health and well-being, personalized nutrition is becoming more mainstream, reshaping how food choices are offered. Once considered a niche concept, personalized nutrition now caters to consumers' growing desire for diets tailored to their specific health and dietary preferences. Advances in technology, such as DNA-based diets, microbiome analysis and apps providing tailored meal suggestions, are making customized nutrition more accessible than ever^[58, 59].

"Personalized nutrition isn't just a trend; it's the future of eating well, tailored just for you."

Erin Boyd Kappelhof, CEO of Eat Well Global

Disruptors like Omnos and ZOE are transforming personalized nutrition, leveraging advanced diagnostics and cutting-edge technology, reshaping how people approach health and well-being^[59].

This demand extends beyond immediate dining experiences, with consumers seeking ways to integrate well-being into their daily lives. Hospitality providers are seizing this opportunity by offering tailored food experiences that address unique health needs, analyzing data like dietary preferences, health goals and even genetic information to design personalized menus. However, as Simone Gibertoni, CEO of Clinique La Prairie, emphasizes, true personalization often requires one-on-one support and medical expertise, so caution is recommended.

An exciting development in this space is the integration of hands-on, "do-it-yourself" experiences that empower individuals to sustain their wellness journey beyond their visit. For example, the B-Life Clinic in Portugal offers tailored cooking classes aligned with nutritional recommendations, providing guests with practical tools to make healthier choices. By combining expert advice with experiential learning, hospitality providers can bridge the gap between dining and long-term health, creating meaningful, lasting connections with their guests.



"The rise of health-conscious consumers presents a key opportunity for hospitality to rethink food, dining and guest experiences. Offering innovative, health-focused options positions the industry at the forefront of this lasting shift—one that will shape its future for years to come."

Emlyn Brown, SVP Well-Being, ACCOR

CASE



Omnos^[60] combines DNA analysis, lifestyle assessments and microbiome insights to deliver customized health recommendations. Their platform translates complex data into simple, actionable steps, empowering users to make informed decisions about diet, exercise and lifestyle. By emphasizing both individual wellness and sustainable choices, Omnos is paving the way for a future where health is truly personalized and achievable for all.

CASE



Similarly, ZOE offers scientifically backed, personalized nutrition plans based on individual biological responses. By analyzing blood sugar levels, blood fat responses and gut microbiome health, ZOE helps users uncover how their bodies react to different foods. This data-driven approach enables users to make smarter food choices that support long-term health, improve energy levels and optimize overall well-being.

As platforms like Omnos and ZOE gain traction, they highlight the growing consumer interest in precision nutrition and set a new standard for the food industry.

To keep up with this trend, food service providers must embrace personalization as a core component of the dining experience in the future, creating offerings that align with the demand for individualized health and well-being solutions. Many possibilities for collaborations between the hospitality industry, the health sector and well-being innovators will further disrupt the industry.

"There are three types of health-conscious consumers:

***Awakened Individuals**, who focus on recovery and prevention after health challenges;*

***Longevity Enthusiasts**, deeply engaged in the science of anti-aging;*

***Wellness Seekers**, who balance health with leisure, seeking experiences that combine relaxation, self-care and wellness. The latter is a growing opportunity for the hospitality players."*

Simone Gibertoni, CEO, Clinique La Prairie

The global personalized nutrition & supplements market size was valued at USD 10.59 billion in 2022 and is expected to expand at a compound annual growth rate (CAGR) of 16.55% from 2023 to 2030^[61].

EXPERIENTIAL DINING BEYOND THE PLATE

Beyond personalization, consumers are increasingly looking for experiential food encounters that connect them to culture, community and nature – in other words, the act of food consumption has evolved into an opportunity to create memorable experiences. The food industry is undergoing a significant transformation, shifting from catering to utilitarian demands to delivering hedonic and eudaimonic experiences. As such, food consumption is no longer simply nutrition-driven, but more a story behind the ingredients, a valuable experience, a sense of belonging, a range of emotions.

Food fulfills complex emotional and social needs, creating an important sense of identity and purpose. From the ambiance of a restaurant to the way food is served, every detail can contribute to making an experiential impact on the guest. A meal that resonates emotionally and socially can become a brief escape, recharging guests and creating lasting memories (further explored in trend no. 6).

"Consumers today seek more than just healthy food; they want experiences that nourish both mind and body."

Sonia Re, CEO, Italian Chefs Association

This shift aligns with the principles of the experience economy outlined by Pine and Gilmore (1998)^[62]. According to this perspective, businesses move beyond providing goods and services to staging transformative experiences that create lasting emotional impacts. In the context of food, this means crafting dining moments that are not just transactional but deeply immersive, engaging the senses, emotions and intellect of consumers.

We have identified some examples:

Clinique La Prairie and One&Only Resorts: In March 2024, One & Only partnered with Swiss longevity clinic, Clinique La Prairie, to launch a Longevity Hub at their Dubai resort. This facility offers personalized wellness programs, including nutrition coaching, IV drips and cryotherapy, tailored to individual health profiles.

Four Seasons Maui and Next Health: Since May 2022, Four Seasons Maui has collaborated with Next Health to provide a Longevity Protocol. This program includes personalized nutrition plans, stem cell therapies and ozone treatments, aiming to improve guests' health and longevity during their stay.

Six Senses Ibiza and Dr. Mark Hyman: Six Senses Ibiza have partnered with Dr. Mark Hyman to open Rosebar, a longevity-focused spa. The spa provides personalized nutrition consultations and customized dietary programs based on guests' health assessments.

During the pandemic, the rise of virtual culinary experiences highlighted how people continue to seek engaging food experiences, even when dining at home. These experiences have blurred the lines between dining, education and entertainment and are expected to remain popular in the future.

There are several innovative and experimental trail blazers, e.g., *Burdock & Co in Vancouver*, engaging consumers beyond the plate by intertwining food with sensory experiences, such as soundscapes generated from ingredients and immersive connections to nature, creating deeper bonds to the environment.

Additionally, collaborations such as the *Aimé Leon Dore Café* in New York, merging fashion retail with high-quality café culture and *Adidas'* hybrid spaces combining retail with local artisanal food experiences, demonstrate how businesses can create multifaceted, community-oriented spaces. Such partnerships inspire hospitality leaders to think beyond traditional boundaries, leveraging cross-industry creativity to deepen connections with guests and communities alike.

CASE 700,000 HEURES IMPACT

700,000 Heures Impact offers personalized dining experiences that integrate regenerative principles. Their approach involves designing exclusive culinary experiences deeply rooted in local traditions and ecosystems. For instance, in Morocco, their projects incorporate sustainable agricultural practices, including permaculture and biochar use, to cultivate ingredients that highlight local biodiversity. They partner with local artisans and communities to create immersive food experiences that celebrate cultural heritage while contributing to economic autonomy and ecological restoration.

At the heart of their model is a commitment to using food as a medium for social connection and regeneration. Their initiatives include food laboratories dedicated to preserving local culinary traditions and experimenting with sustainable gastronomy. These efforts empower local communities, particularly women, through capacity-building programs and cooperative structures, ensuring the economic benefits extend beyond the guest experience.



TECH-ENHANCED DINING EXPERIENCES

Technology helps create food experiences that are as engaging as they are delicious. From robots preparing and serving meals to AI-driven personalization, immersive storytelling and wearables connecting dietary habits with well-being in real time, technology is enhancing numerous aspects of the dining journey. These innovations offer smooth operations and captivate diners by blending convenience with entertainment. The result is a dining experience that engages the guest and brings a futuristic touch to the table.

Here are some examples of how experiential dining can be merged with tech innovation:

Haidilao Hot Pot (China): This renowned hot pot chain introduced a fully automated kitchen in its Beijing location. Robots manage food preparation and delivery, while AI systems oversee inventory and customer preferences to enhance efficiency and personalization.

Le Petit Chef (Belgium): An innovative dining concept that combines technology and storytelling to create an immersive culinary journey. Utilizing 3D projection mapping, a miniature animated chef is projected onto diners' tables, guiding them through a multi-course meal with engaging visuals and narratives. This fusion of digital art and gastronomy transforms traditional dining into an interactive spectacle, enhancing the sensory experience for guests.

Elysium (Switzerland): At this innovative restaurant based within EHL Campus Passugg, technology is thoughtfully integrated into the dining experience, offering guests an immersive environment where cutting-edge digital systems enhance service efficiency and personalization. From interactive menus to real-time feedback systems, the fusion of experience and technology elevates both the guest journey and operational excellence.

Wearable technology deserves special mention as it is transforming the food and hospitality industries by enabling personalized nutrition and health monitoring. These technologies, often called “wearables”, are electronic gadgets designed to be worn on the body to track health-related metrics. The most used wearables include wrist-mounted devices such as smartwatches and fitness bands, followed by headgear, eyewear, footwear, necklaces and body-mounted gear. These devices track dietary habits, biometrics and gut health markers, helping make informed food choices and manage conditions like IBS and food intolerances. In the hospitality sector, wearables support personalized services, allowing businesses to cater to dietary preferences and promote wellness.



Dining experience at Haidilao Hot Pot



Dining experience at Le Petit Chef



Dining experience at Elysium

"Wearables and AI are transforming how we eat, move and live — technology is helping us thrive."

Chavanne Hanson, Global Food Choice Architecture and Nutrition Manager, Google

Key applications include real-time feedback on dietary choices, integration with AI for predictive analytics and tools for diagnosing and monitoring gut health. Wearables also contribute to sustainability by tracking the environmental impact of food choices and encouraging plant-forward diets^[63-72].

By integrating wearables into their service offerings, hospitality providers are tapping into the growing demand for health-conscious and personalized guest experiences. This innovation not only enhances customer satisfaction but also strengthens the positioning of these businesses as leaders in wellness tourism.

THE ROLE OF AUTHENTICITY AND SIMPLICITY

As exciting as tech-enhanced experiences are, the emotional and sensory aspect of the meal is vital for directly contributing to hedonic well-being. Technology can serve as a complement, enriching the experience without overshadowing it. When used thoughtfully, digital tools can elevate personalization and engagement, but when overused or misplaced, they risk detracting from the authenticity and warmth of hospitality.

Compass Design Director, Philipp Kirnbauer, speaks to this tension, suggesting that the rapid pace of digitalization can diminish our capacity for deep, meaningful experiences. The fleeting images and interactions of the digital realm often fail to leave a lasting impression on the heart and mind. After all, *"... nothing really wonderful will ever happen to you on a screen"* - Philipp Kirnbauer, Director Project & Design, Compass Group.

Hospitality thrives in the sensually perceptible world, where human connection and a genuine sense of care (the essence of *"omotenashi"*, as the Japanese describe it) create memories that linger long after the meal is over. As Maya Angelou famously observed, people may forget words or actions, but **they never forget how they were made to feel**. The challenge is clear: to master technology as a tool that amplifies the human elements of dining, ensuring that innovation enhances rather than replaces the soul of the experience.

"We've over-complicated hospitality. Less is more and the world needs to rethink its approach to luxury and food experiences."

Malcolm Omond, Senior Director, Workplace - Food, Health and Events
Google Asia Pacific, Singapore



In an increasingly complex world, **simplicity** and **authenticity** are emerging as vital sub-trends in the hospitality industry. These principles help to shape dining experiences whilst addressing the growing consumer demand for genuine connections and meaningful meals (*further explored in trend 6*). Dr. Marc Stierand, EHL professor and culinary expert, highlights the distinction between complexity and complication as key: complexity reflects depth and sophistication, while complication often signals a lack of competence. Simplifying offerings and focusing on quality can elevate dining experiences, creating a stronger emotional connection with guests.

A focus on simplicity also helps alleviate food-related anxieties, particularly among younger generations like Gen Z, who often experience "menu anxiety" when confronted with overwhelming choices or unclear options. Recent research has underscored the prevalence of "menu anxiety" among younger demographics. A OnePoll survey for Avocado Green Mattress revealed that 30% of Americans feel anxiety while ordering food at restaurants. Anxiety is more prevalent in younger populations, with 41% of Gen Z and millennials (ages 18-43) experiencing such sensations, in contrast to merely 15% of Gen X and baby boomers (ages 44-77).^[73]

OnePoll,^[73] a research survey by the British restaurant chain Prezzo, revealed that 86% of Gen Z adults experience stress when ordering food at restaurants. By curating concise, thoughtful menus, hospitality providers can create environments that feel approachable and stress-free, enhancing guest satisfaction.

Simplicity does not mean sacrificing creativity or excellence, it means refining processes to achieve mastery. A menu with a few well-executed dishes, like a standout bacon burger or a meticulously crafted pizza dough, can be more impactful than a sprawling menu filled with mediocrity.

Authenticity goes beyond flavors; it's about creating immersive experiences that connect diners with a place, culture or memory. Whether through the atmosphere of an Italian restaurant that feels like Piemonte or a nostalgic meal that reminds guests of simpler times, authenticity creates a sense of belonging. This connection is rooted in the passion and competence of those behind the food, as their love for their craft translates into the experience they create.

"Experiences create change. Through food, we can inspire our guests to take sustainability home with them."

Jennifer Klar, Director of Corporate Sustainability, Six Senses

According to *Simon-Kucher & Partners*, younger consumers are starting to increasingly seek authenticity, valuing restaurants that incorporate farm-to-table principles, showcase locally appropriate cuisines and highlight innovative dishes that resonate with environmental concerns.

By prioritizing simplicity and authenticity, hospitality businesses can create meaningful dining experiences that go beyond the plate and help to develop special emotional connections and loyalty. These principles align with broader trends in well-being and reflect a return to the roots of gastronomy, where the beauty of food lies in its ability to touch the soul.

FOOD EFFICIENCY IN A FAST-PACED WORLD

While personalization and experience dominate food trends, convenience remains a top priority for many consumers. Busy lifestyles mean that people still need access to quick, easy and affordable meals, even in the pursuit of healthier and more sustainable diets. The food industry has responded with innovations like meal kits, on-demand delivery services and pre-prepared healthy snacks, allowing consumers to maintain their values while still benefiting from convenience.

Consumers want food that fits into their lives without sacrificing quality or taste. Within the context of personalized nutrition, convenience plays a crucial role, as seen with food companies that provide easy-to-use tools for meal planning, shopping and preparation. The rise of fast-casual restaurants such as *Clover Food Lab*, *CAVA*, *Freshii*, *Sweetgreen*, *MOD Pizza*, *DIG* and many more that offer customizable and healthy meals demonstrates that convenience and health are not mutually exclusive.

CASE *Bruzzone*

Fratelli Bruzzone, a family-run restaurant in Turin, Italy, specializes in authentic Piedmontese cuisine made with fresh, seasonal, locally sourced ingredients. Their menu focuses on traditional regional dishes with an emphasis on simplicity and quality, a formula that has earned praise from both the Michelin Guide and local diners.

A key aspect of their appeal, in particular with daily diners, is personalization. Co-owner and chef Martina Bruzzone highlights their flexibility: *"The meals we serve reflect what Italian families eat at home. If a guest requests a specific ingredient or variation, we do our best to accommodate. Regulars often ask for off-menu dishes that align with their health goals and we're happy to oblige."* Fratelli Bruzzone's approach combines fresh ingredients with tailored hospitality, creating a dining experience that feels both personalized and genuine.



Even the larger fast-food brands like *Chipotle* have caught on to this wave. Chipotle is a well-known fast-casual chain that allows customers to build their own meals now, choosing from a variety of healthy, customizable options. Patrons can start with a base (such as burrito, salad or bowl) and then add proteins (chicken, steak or plant-based sofritas), followed by a range of toppings (beans, vegetables and salsas). Their commitment to using ethically sourced, non-GMO ingredients and offering vegan and vegetarian options adds to its appeal as a healthy, customizable dining option.

Delivery services have therefore become key to meeting these evolving expectations by blending convenience with personalized choices. Platforms like *iFood*, the largest food delivery platform in Latin America, showcase how delivery models are adapting to meet both diverse dietary preferences and the growing demand for speed

and accessibility. Hitting over 100 million monthly users in August 2024, *iFood* has observed that convenience-driven delivery is no longer limited to 'indulgent foods' but now includes a wide array of cuisines, including healthier and globally inspired options.

"The food delivery game isn't just about burgers and pizza anymore—healthy choices are skyrocketing."

Marcos Gurgel, Head of Innovation, iFood

By offering loyalty programs, flexible ordering times for all meals and customized recommendations powered by AI, delivery platforms enable users to access varied, nutritious meal choices at the click of a button. Customizable delivery platforms like *MealPro* or *MyProMeals* are tapping into the growing demand for personalized nutrition by offering meals that customers can tailor to meet their specific dietary needs. These services go beyond traditional meal delivery by allowing customers to select individual components, such as protein, carbohydrate and vegetable options in specific portions.

This shift not only aligns with consumer demands for convenience but also supports the industry's broader move towards well-being, as individuals can make choices that suit their health goals while enjoying an efficient service experience.

HelloFresh and *Liv Up* also serve as compelling examples for how the food industry is responding to the demand for both personalization and convenience, while maintaining a focus on healthy, sustainable eating. The future of food service, we believe, lies in the ability to balance these three trends, it's about creating systems that offer personalized, high-quality experiences while maintaining efficiency and accessibility. The integration of technology, such as AI-powered meal planners and smart kitchens, will help businesses cater to the growing demand for customization without compromising on convenience.

"Healthy habits shouldn't be hard, even on the go"

Guilherme Hilsdorf, Founder and CEO, Muds



CASE

HelloFresh, a leading meal kit delivery service, exemplifies how businesses are addressing the need for convenient, healthy and customizable meals. Consumers can choose from a variety of meal plans tailored to their specific preferences, including options for vegetarians, low-calorie diets and family-friendly meals. By providing pre-portioned ingredients and easy-to-follow recipes, HelloFresh offers both personalization and convenience in one package. In addition to the customization of meals, HelloFresh focuses on reducing food waste by delivering only the exact quantities needed for each recipe. This aligns with growing consumer demand for sustainability in the food industry. Customers can enjoy home-cooked meals without the hassle of meal planning or grocery shopping, making it ideal for busy individuals or families who want to eat healthier while still benefiting from the efficiency of meal kits. HelloFresh also allows customers to modify their meal plans on a weekly basis, which further enhances service personalization.



CASE

Liv Up, a Brazilian startup focused on healthy, ready-to-eat meals, is another example of how the industry is balancing convenience with a focus on personalized nutrition and sustainability. Liv Up provides pre-prepared meals that cater to a wide range of dietary preferences, including options for those following plant-based, low-carb, or gluten-free diets. The company emphasizes using locally sourced, organic ingredients, aligning with the growing consumer focus on sustainability and ethical sourcing. Liv Up allows consumers to personalize their meal choices based on their health goals and taste preferences, while also offering the convenience of having ready-to-eat meals delivered to their doorstep. This service fits into the fast-paced lives of modern consumers who prioritize healthy eating but may not have the time to prepare nutritious meals from scratch. Liv Up's focus on transparency, with clear labeling and sourcing information, also resonates with the conscious consumer's demand for accountability in the food system.

INDUSTRY RECOMMENDATIONS

AI-driven nutrition: Leverage AI and data analytics for personalized meal recommendations based on dietary and health needs.

AI-driven delivery: By offering loyalty programs, flexible ordering times for all meals and customized recommendations powered by AI, delivery platforms enable users to access varied, nutritious meal choices at the click of a button.

Customizable meals: Offer “Make Your Own” meals, cooking classes, or other options that cater to individual preferences.

Technology integration: Use tech tools, like wearables and health trackers to provide hyper-personalized wellness and dining experiences.

Cross sector collaboration: Collaborate increasingly with nutritionists, doctors and start-ups for catering to personalized needs.





TREND No. 3

CO-RESPONSIBILITY: A SHARED COMMITMENT

A third significant trend is the growing demand for shared responsibility in food choices, where consumers look to hospitality players for guidance and collaboration. With their expertise and ability to connect to diverse audiences, they play a significant role in influencing beyond the plate, shaping a more informed and responsible dining culture. This shift highlights the hospitality industry's critical role in driving sustainability and meeting evolving consumer expectations through transparency, partnership and shared purpose.

WHO IS RESPONSIBLE FOR GUIDING OUR FOOD CHOICES?

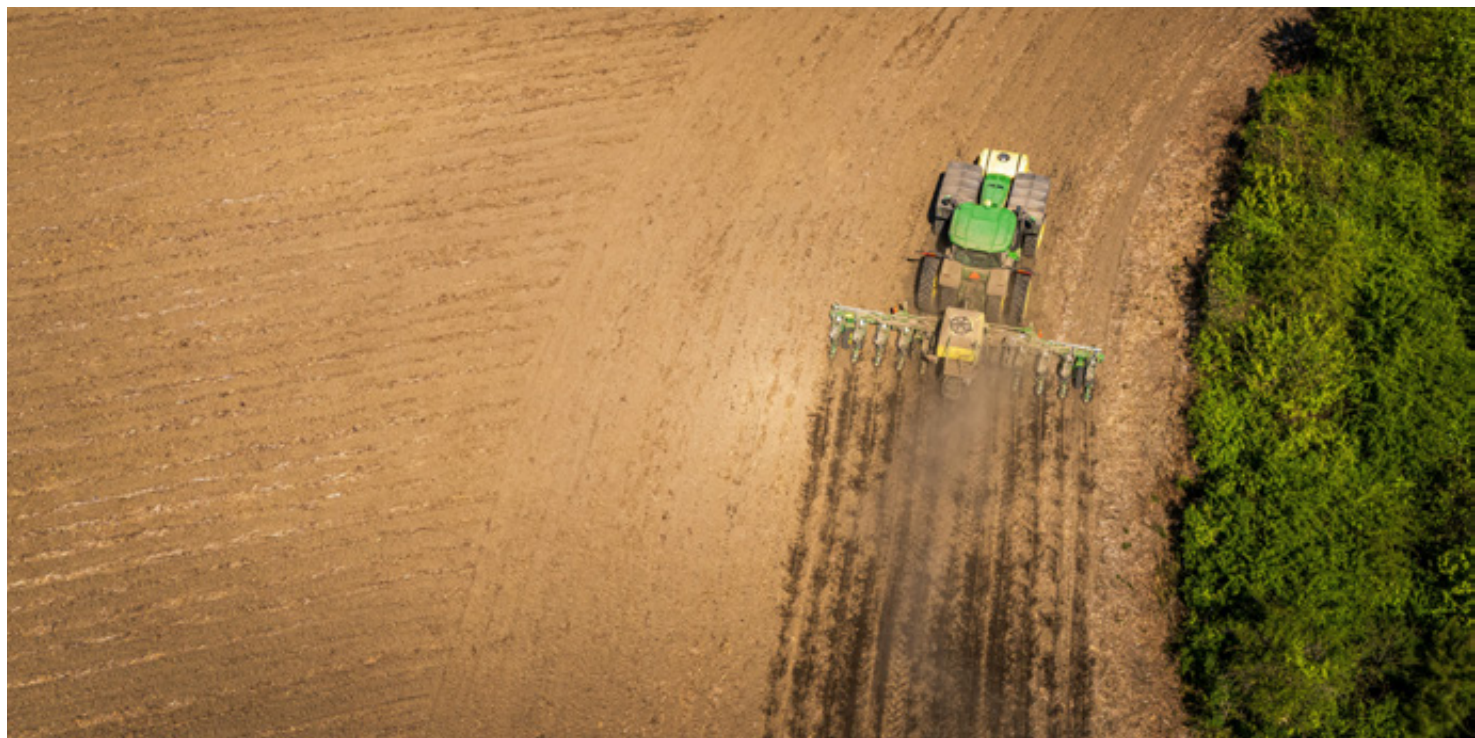
The responsibility for nutrition, well-being and food choices should be shared among individuals, businesses, chefs and governments, requiring collective action rather than isolated efforts. Modern food systems, while offering convenience and abundance, often create environments that do not help individual efforts to make healthier choices. Processed foods dominate many diets and consumers are bombarded with marketing messages encouraging them to prioritize instant gratification over long-term health. In such an environment, it is unrealistic to expect individuals to carry all responsibility.

"Government and hospitality must work hand in hand to make healthy food more accessible to everyone."

Dr. Dessislava Dimitrova, Deputy to Head of Innovation, WHO

President and CEO of the Culinary Institute of America, Michiel Bakker, advocates for co-responsibility. Policies that promote sustainable and health-conscious food systems are critical and governments play a central role by setting regulatory frameworks that incentivize healthier food production and equitable access. Businesses should adopt ethical practices that prioritize consumer health and environmental sustainability, while chefs and food leaders have the opportunity to use their platforms to educate and empower consumers, designing menus and experiences that support better choices without sacrificing flavor or culture.

Communities and social structures also play a part in shaping dietary habits and food culture. The shared responsibility extends to how we collectively value food, prioritize health and support access to nutritious options. This shared approach not only addresses immediate challenges like diet-related diseases but also tackles systemic issues such as food insecurity and climate change, creating a more sustainable and equitable food culture.



THE ROLE OF SCHOOLS AND WORKPLACES

Continuous education and awareness are foundational to developing a sense of co-responsibility. Early food literacy programs in schools and the community, as well as workplace initiatives, can instill an understanding of how food choices impact health, environment and society. For example, workplaces have emerged as influential environments for promoting healthier lifestyles. They provide opportunities to shape food offerings and educate employees about the benefits of balanced diets, sustainable sourcing and reduced waste. By embedding these practices into daily operations, workplaces can become microcosms of a broader culture of well-being and sustainability.

“Food literacy is a right, not a luxury—it’s time to make food education as central as math and history.”

Charles Michel, Chef, Food Educator and Author

In institutional settings such as corporate, school or college campuses, food service providers have an added responsibility to support consumers. Companies like Bon Appétit Management Company integrate wellness guidance into their operations, from offering intuitive eating principles to reducing the stigma of bad dietary decisions. This reflects a shift from overeducation to creating environments that naturally encourage healthier choices.

THE ROLE OF CHEFS AND THE F&B SECTOR

According to the Edelman Trust Barometer (2024), trust in the food and beverage sector remains high, with 72% of global respondents expressing confidence in this industry. Importantly, chefs and hospitality professionals are seen as influential figures who can help bridge the gap between innovation and consumer trust. The findings highlight that people are increasingly turning to trusted sources, including scientists and peers, for reliable information about food and innovation, with 74% of respondents expressing confidence in these groups.

This positions chefs as both innovators and trusted voices in guiding consumers towards healthier, more sustainable food choices. By embracing plant-forward diets and showcasing creative ways to prepare nutritious meals, chefs can lead the charge in making sustainable eating both desirable and accessible, aligning with broader consumer expectations for transparency and ethical food practices.

CASE BRIGAIID

Chefs Brigade is a great example impacting the next generation through healthy school meals. This organization brings together chefs with a mission to revolutionize the way food is prepared and served, especially in institutional settings like schools. By using their culinary expertise and innovative approach, chefs transform nutritious ingredients into meals that are healthy, enjoyable and stay within the often-limited school budgets.

Chefs Brigade exemplifies this by empowering chefs to create flavor-packed, balanced meals that meet nutritional standards while appealing to a wide audience, especially children. This approach helps dismantle the perception that healthy eating is bland or unattractive, proving that with the right creativity and skill, plant-forward and nutritious meals can become everyday favorites. By focusing on quality, taste and presentation, chefs can drive meaningful change in how people, especially younger generations, engage with healthy, sustainable food.

CASE

Google showcases how workplaces can foster well-being and community through innovative food programs, e.g., by prioritizing balanced diets, offering nutrient-dense meals and promoting plant-based options. Google supports healthier lifestyles among employees without imposing but rather eliminating access friction, directly influencing well-being as well as productivity and creativity. Sustainability is central to its operations, with initiatives like AI-driven food waste reduction and locally sourced ingredients minimizing environmental impact. Additionally, Google uses food to build community, creating shared spaces and hosting "teaching kitchens" to connect employees through collaborative dining experiences.

Through subtle education and behavior-guiding initiatives, Google encourages employees to make informed food choices that benefit both personal well-being and the planet beyond the office. Google Foods exemplifies how workplaces can become microcosms of well-being and sustainability, inspiring organizations worldwide.

In addition to developing sustainable diets, chefs and cooks also have a significant role in addressing food waste (*explored further in trend no. 5*). However, Mark Brand, chef and food activist, warns that while chefs have a responsibility to promote well-being and sustainable practices, "greenwashing" within the industry is very present where marketing overshadows genuine sustainability efforts. For meaningful impact, chefs should embrace transparency and authenticity in their sourcing and operations as a starting point.

LINE COOKS AND SERVERS

According to our expert interviews and the *2024 Trends in Climate Smart Eating* report, line cooks and servers are increasingly recognized as change agents in promoting climate-smart eating as they support customers with healthier choices if trained accordingly^[74]. While chefs and foodservice operators play a central role in menu design, hourly staff such as line cooks and servers have direct, influential interactions with diners that can guide them towards better choices^[74].

When line cooks understand the personal and creative value of plant-forward, healthier cooking, for example, their enthusiasm and empathy translate onto the plate, making sustainable and healthy options more appealing to guests. Likewise, front-of-house staff can subtly influence diners through informed recommendations and storytelling, making their engagement vital to the success of climate-smart and health initiatives.

"Train your team to be the voice of your story, bringing the journey and purpose of the food to life. When they stand in front of the client, it's not just about service—it's about creating a moment of connection and meaning."

Mark Brand, Chef and Food Activist

A recent report by Foodward, ZHAW and Gastrofutura (2023)^[75] highlights that storytelling is one of the most effective ways for restaurants to make meals more enjoyable and meaningful for guests. By explaining where ingredients come from and how they're sourced or prepared sustainably, restaurants can help guests feel more connected to their food. Sharing these details, either through staff or menus, makes meals more appreciated. Guests value meals more when they feel informed and engaged^[76].

Securing buy-in at every level, from executives to hourly staff, is key for such initiatives to succeed^[74]. Strategies to engage staff include involving them in the development of dishes, providing recognition through certificates or acknowledgments and delivering accessible training^[74]. Such training should include guidance on how to effectively communicate sustainable practices to better engage the clientele and promote healthy food initiatives.

"In Brazil, food sustainability has emerged as a significant trend, yet many people remain at the surface, not fully understanding its deeper implications. This is where we as chefs can help."

Maristella Sordo, Sustainable Gastronomy Chef

Furthermore, operational ease is a critical factor, e.g., configuring point-of-sale systems to streamline plant-based substitutions.

The *Food for Climate League's* work with the *Good Eating Company* demonstrated that after education on the benefits of sea vegetables, the intention to offer these options grew from 17% to 71%. Google's Global *Culinary Inspiration Program* co-developed with Food for Climate League, similarly, empowers chefs and cooks, igniting intrinsic motivation that enhances sustainable offerings and elevates dining experiences.



CULINARY LEADERS AS CHANGEMAKERS

Groups like the *Chef's Manifesto* and *Social Gastronomy Movement* can serve as a guiding tool for chefs and industry players as they promote a systemic approach to food issues and look at food as part of an interconnected system involving nutrition, sustainability, social inclusion and diversity. By adhering to such principles, industry players can contribute meaningfully to global food sustainability and inclusion goals.

"Chefs are the translators of our food system – they balance taste, texture and health on every plate."

Katie Stebbins, Executive Director, Food & Nutrition Innovation Institute, Friedman School of Nutrition Science and Policy at Tufts University

Paul Newnham, CEO and Founder of Chefs Manifesto and the SDG Hub, notes that even in larger hospitality settings where chefs may feel they have limited influence, they can still shape food practices within their organizations. By educating themselves on the impacts of their food choices and advocating for thoughtful, sustainable procurement, chefs can influence both their businesses and their customers' perspectives on food.



CASES

EBRU
BAYBARA
DEMİR

GASTRO
MOTIVA

In the field of social gastronomy, chefs like Ebru Baybara Demir and David Hertz are pioneering role models who use food as a catalyst for social change and community resilience. Ebru Baybara Demir, a celebrated Turkish chef, has implemented numerous projects that focus on empowering local communities, especially refugees, through sustainable agriculture and food production. One of her signature initiatives, *From Soil to Plate*, trains Syrian and Turkish women in sustainable farming, food security and economic independence. Her remarkable contributions have earned her recognition on a global scale, including the Basque Culinary World Prize and Food & Agriculture Organization Food Hero, which she received for her social impact through food.

Similarly, David Hertz, Brazilian chef and founder of *Gastromotiva*, has transformed the lives of underserved communities by offering culinary training programs that create job opportunities in the hospitality sector. His work has expanded to food waste and community kitchens. He was one of the first to work with the term of Social Gastronomy. Hertz's dedication has garnered international awards, including the Schwab Foundation Social Entrepreneur of the Year, Ashoka fellow and UN Food Systems Champion.

Both Demir and Hertz exemplify how chefs can go beyond the kitchen to address urgent social issues, serving as inspiring figures for the global culinary community.

REINVENTING EDUCATION THROUGH TRANSDISCIPLINARY APPROACHES

There is a growing expectation for chefs and hospitality professionals to promote healthier and more sustainable food options, a task that requires equipping them with the right tools and training. To truly meet the rising demand for responsible dining, educational models for hospitality professionals need to adopt a more transdisciplinary approach. While chefs are increasingly entrusted with guiding healthy and sustainable food choices, they would benefit greatly from training that goes beyond culinary skills to include insights on nutrition, environmental science and food literacy.

“Education is key. If we teach our employees to be healthier and happier, our customers will feel it too.”

Stefani Bardin, Professor of AI & Food Design, NYU

Unfortunately, many current educational offerings lack the holistic perspective essential to meet today's increasingly informed consumer demands. Programs centred on food literacy, nutrition, climate-conscious sourcing and waste reduction could be providing future chefs and food service operators with the knowledge needed to lead responsibly. This approach not only supports the broader objectives of the Planetary Health Diet but also equips the next generation of hospitality professionals with the skills to foster a sustainable and resilient food system.

Research further highlights that culinary medicine (CM) and culinary nutrition (CN) education are promising avenues for improving food quality and addressing chronic diseases. Programs designed for health professionals and culinary students have demonstrated favourable outcomes, including enhanced culinary skills, increased nutrition knowledge and healthier eating habits⁷⁷. Integrating such education into hospitality training can bridge gaps in food knowledge, empowering chefs to understand both the nutritional and environmental impacts of their ingredients.

Institutions such as the Future Food Institute in Italy and the Food for Climate League in the United States already supplement traditional educational training initiatives, emphasizing a transdisciplinary curriculum that spans environmental science, nutrition and systems thinking. The Future Food Institute offers immersive courses that bridge culinary practices with planetary stewardship, as well as a new program preparing "Agri-chefs"—professionals who link agriculture with gastronomy by learning to cook directly from the land they work on. This model encourages chefs to connect with soil health, local biodiversity and sustainable sourcing, positioning them as educators and advocates for regenerative food practices.

“Agri-chefs are the new pioneers—blending farming and cooking to nourish both people and the planet.”

Sara Roversi, Founder and CEO the Future Food Institute

The Food Climate League asserts building climate literacy within the food industry to inspire climate-positive choices. Notably, EHL Group has also made sustainability a transversal priority across its courses, embedding it within every facet of the curriculum to prepare hospitality professionals for the demands of a more sustainable future. The EHL Sustainability Lab at the EHL Passugg Campus stands out for its innovative approach to exploring interconnected systems. By collaborating with the Framers School Planta Hof, the lab delves into upstream and downstream cycles, encouraging students to think beyond their primary sector. This initiative promotes a holistic understanding of sustainability, bridging agriculture, hospitality and environmental stewardship to prepare students for the complexities of sustainable practices in the industry.

Before the educational offer catches up on a large scale, cross-sector collaborations between food outlets and nutritionists or doctors will allow for advancement.

“It's not just about what's on your plate—it's about the choices behind it.”

Jane Upritchard, Global Director of Nutrition, Health & Well-being,

Compass at Google



INDUSTRY RECOMMENDATIONS

Continuous learning and training: Encourage teams to engage in ongoing learning and training that incorporates transdisciplinary approaches and practical skills to address modern food challenges.

Empower line cooks and servers: Train line cooks and servers to promote climate-smart and healthy eating options, as they have direct interactions with diners and can guide them toward better choices.

Promote shared responsibility: Encourage collective action among individuals, businesses, chefs and governments to improve nutrition and well-being, rather than relying on isolated efforts.

Storytelling and guest engagement: Use storytelling to make meals more enjoyable and meaningful, helping guests feel connected to their food by sharing information about ingredient origins and sustainable practices.

Transdisciplinary education: Revamp educational models for hospitality professionals to adopt a transdisciplinary approach, including training in nutrition, environmental science and food literacy.

Workplace initiatives: Utilize workplaces as influential environments for promoting healthier lifestyles by shaping food offerings and educating employees about balanced diets.





TREND No. 4

EATING FOR VITALITY: THE INTERSECTION OF FOOD AND HEALTH

As consumer preferences evolve, the intersection of health and food is emerging as a deeply significant trend of the future within the hospitality industry. The role of food in promoting health and well-being is becoming increasingly central to consumer priorities and hence, is key in reshaping the future of the hospitality industry.

Concepts such as ‘food as medicine’ are gaining traction, drawing attention to the potential of nutrient-rich diets to help prevent chronic diseases, enhance longevity, mental clarity and emotional balance^[78]. Research supports the growing recognition of the way dietary choices impact overall health, from managing conditions like diabetes and cardiovascular disease to improving gut health. As consumers seek meals that align with their wellness goals, the hospitality sector is evolving to meet this demand by offering health-focused options that cater to a wide array of needs^[79].

THE INTERSECTION OF FOOD AND HEALTH

Experts emphasize that nutrition and food impact a broad range of sectors - from pharmaceuticals and food production to public health. This cross-disciplinary influence makes nutrition a key element in addressing chronic diseases and improving population health outcomes. Obesity, celiac disease, cardiovascular issues and increasing oncological conditions are health challenges closely tied to dietary habits and are hence on the rise as many consumers begin to understand the interrelatedness.

"As interest in longevity and healthy living grows, scientific research on food, supplements and habits that promote longer, healthier lives will undoubtedly shape future food demand."

Med. Dr. Anna Schürner Strassburg, CEO and Founder, ANNAlyse

For example, plant-based diets with plenty of whole grains, fruits, vegetables and nuts have been shown to improve cardiovascular health^[29, 80] and benefit glycemic control, HbA1c levels and weight management for those with type 2 diabetes^[81, 82]. These diets have been associated with better psychological well-being and quality of life for diabetes patients^[81]. Wellness research advocate, Susie Ellis, believes that the concept of *Blue Zones*, introduced in 2005 by Dan Buettner in collaboration with researchers Gianni Pes and Michel Poulain, has had a profound influence on the food and well-being sector.

According to the *Blue Zones*^[83] concept, these regions—Sardinia (Italy), Ikaria (Greece), Okinawa (Japan), Nicoya Peninsula (Costa Rica) and Loma Linda (California, USA)—are home to populations that consistently live longer, healthier lives. The researchers identified lifestyle and dietary patterns common across these zones, such as plant-based diets, regular physical activity, strong social connections and a sense of purpose. These findings have inspired some hospitality and wellness sectors to embrace and integrate *Blue Zone* principles into their offerings, creating programs and menus that promote longevity through food. From plant-forward dining and mindfulness retreats to curated experiences based on connection and community, the lessons from *Blue Zones* serve as an inspiration for healthier lifestyles worldwide.



An interesting observation is the consumer shift from reducing 'negative' elements (sugar, salt, bad fats) to adding beneficial components (fibers, prebiotics and functional ingredients) to support mental and physical well-being. This reflects the growing consumer awareness that food is an essential component of preventative healthcare. Ingredients that support gut health, like probiotics, adaptogens and fiber-rich foods, are becoming central to hospitality menus, as the microbiome is increasingly being recognized for its profound influence on well-being^[84].

"Conversations around inflammation from food and gut health have grown significantly, moving from being a fringe topic to a mainstream conversation."

Annie Ryu, CEO & Founder of Jack & Annie's

Incorporating functional ingredients further aligns hospitality offerings with the growing demand for health-conscious options. This approach supports both mental and physical well-being while instilling deeper connections with guests and positioning hospitality providers as trusted partners in their wellness journeys.

A growing body of research points to the importance of nutrition for mental health, with studies that show the link between diet and emotional regulation, cognitive performance and sleep^[85]. Studies such as those from *Harvard Medical School* and McLean Hospital highlight how nutrient-rich foods like omega-3s and antioxidants can support both physical health and emotional balance by improving brain function and neurotransmitter production^[86].

"The interaction between food and sleep is underestimated. Eating the wrong foods affects your sleep and poor sleep impacts your health and dietary patterns."

Malcolm Omond, Senior Director, Workplace - Food, Health and Events
Google Asia Pacific, Singapore

For the hospitality industry, these findings present an opportunity to create well-being-focused dining experiences that appeal to health-conscious consumers seeking both indulgence and functionality in their meals. By offering menu options that prioritize mental health benefits and educating guests on their nutritional value, hospitality businesses can differentiate themselves and build stronger connections with their clientele.

CASE TUSOL

TUSOL Wellness in the U.S. is an example of a smoothie company that incorporates both probiotics and adaptogens into their offerings. Their smoothies are made with organic, plant-based ingredients designed to support gut health, energy levels and overall well-being. For instance, TUSOL's Balance Smoothie includes a proprietary blend of probiotics and adaptogens aimed at reducing inflammation and supporting digestive healing.

CASE LONDON NOOTROPICS

Since 2020, *London Nootropics* have been blending coffee with specially sourced adaptogens (e.g., medicinal mushrooms, rhodiola and ashwagandha) to promote mental balance and 'a flow state'. This synergistic mushroom coffee provides a healthier alternative to regular coffee. With an earthy flavor, it can help reduce stress, boost the immune system and, thanks to mushrooms like Lion's Mane and Cordyceps, is also anti-inflammatory and contains a high number of antioxidants.



FOOD AS MEDICINE

The concept of 'Food as a Medicine' is based on the profound impact that diet has on health, healing and disease prevention. Rooted in ancient traditions like Ayurveda and Traditional Chinese Medicine and supported by modern nutritional science, this approach emphasizes the therapeutic potential of food to address chronic illnesses, improve mental health and promote overall well-being. Core principles include consuming nutrient-dense whole foods, integrating anti-inflammatory ingredients and tailoring diets to individual health needs.

The concept of food as medicine has gained significant traction in recent years, reflecting a growing awareness of the role diets play in preventing disease and improving overall well-being. Advocates of food as medicine highlight its potential to transform healthcare by shifting the focus from treatment to prevention and using food to combat issues such as chronic illnesses, malnutrition and other health problems. According to the [Global Wellness Institute \(2024\)](#),^[40] the food-as-medicine market, encompassing functional foods and beverages, is projected to grow by 7.3% annually from 2023 to 2028, reaching nearly \$90 trillion by 2028, driven by consumers seeking nutrient-dense options to enhance physical and mental well-being.

"Empowering physicians to educate patients about diet and lifestyle can create systemic shifts in how we approach food, fostering plant-forward diets that benefit both personal health and the planet."

Sara Burnett, Executive Director, ReFed

However, this framing is not without critique. Chef Kabui, a prominent voice in sustainable gastronomy, challenges the food-as-medicine narrative, arguing that it risks reducing food to a functional tool for addressing sickness. He contends that "food is food" and should be celebrated for its cultural, sensory and communal value rather than being redefined as a substitute for pills. Kabui stresses the importance of eating wholesome, natural foods to maintain health, suggesting that if we consistently consume real and simple food, we wouldn't need to frame it as 'medicine'.

This perspective calls for a return to simplicity once again, viewing food not through the lens of treatment but as an essential, nourishing aspect of life. These contrasting views reveal the evolving discourse on how society perceives and utilizes food in the context of health and wellness.

"We have to eat in a way that promotes life."

Njathi Kabui, Chef, Food Designer, Anthropologist and Writer

THE GROWTH OF NON-ALCOHOLIC BEVERAGES

The non-alcoholic beverage market is experiencing significant growth, driven by consumers' increasing preference for health-conscious and mindful drinking options. In the United States, the market was valued at approximately \$280.2 billion in 2023 and is projected to grow at a compound annual growth rate (CAGR) of 7.4% from 2024 to 2030 ([Grand View Research](#)). Globally, the market is expected to reach \$1,223.93 billion in 2023, with a similar anticipated CAGR of 7.4% through 2030. This evolution is largely due to an increased awareness of the health impacts of alcohol and a desire for socially inclusive drinking options ([Grand View Research](#)).

Younger generations are at the forefront of this movement. For instance, 78% of Gen Z in the UK report reducing alcohol consumption, with practices like "zebra striping"—alternating between alcoholic and non-alcoholic beverages—gaining popularity. Similarly, in the US, non-alcoholic drinks grew by 20.6% between August 2021 and August 2022, reaching \$395 million^[87].

Sober bars open as a consequence of the non-alcoholic beverage trend, offering alcohol-free spaces where patrons can enjoy crafted mocktails and connect in a wellness-focused environment. These venues cater to the growing demand for social experiences that align with health-conscious lifestyles and the "sober curious" movement. Examples include [Sans Bar](#) in Austin, US, known for its creative alcohol-free cocktails and [The Virgin Mary Bar](#) in Dublin, Ireland, which offers a diverse selection of zero-proof cocktails, beers, ciders, wines and sparkling beverages.



The larger hospitality industry is adapting its non-alcoholic offerings, incorporating innovative mocktails, alcohol-free beers and other alternatives into menus to cater to this growing demand. These beverages not only provide an inclusive experience for diverse audiences but also align with broader health and well-being trends, solidifying their place as a staple in modern dining.

"Liquid gastronomy is evolving, embracing non-alcoholic options and vibrant, culturally rich ingredients. Venues like Bar Ulew in Antigua Guatemala are crafting mocktails that celebrate Mesoamerican heritage."

Ana Gerlin, Innovation Hub Host, WHO and Founder, NUTRIVERSE

These examples illustrate a worldwide shift in the dining industry, with restaurants across continents innovating to provide non-alcoholic beverages that enhance the culinary experience, catering to the preferences of a diverse clientele.

"Your health is your wealth and hospitality brands that understand this will lead the way."

Susie Ellis, Chair & CEO, Global Wellness Summit and non-profit Global Wellness Institute



CASE CENTRAL

Central (Lima, Peru): At Virgilio Martínez and Pía León's establishment, the beverage team collaborates with Mater Iniciativa, the restaurant group's research arm, to craft non-alcoholic pairings that highlight Peru's biodiversity. These include drinks like an avocado and passion fruit blend and a fermented pineapple with corn beverage, designed to complement the diverse menu.

CASE Disfrutar

Disfrutar (Barcelona, Spain): Disfrutar has developed methods to remove alcohol from wine while preserving its flavor and aroma, offering an innovative experience for guests seeking non-alcoholic alternatives.

CASE FYN

FYN (Cape Town, South Africa): This fine-dining restaurant has seen a significant increase in demand for its non-alcoholic pairing menu, reflecting a global trend towards sophisticated alcohol-free dining experiences.

DEFINING HEALTH-DRIVEN HOSPITALITY EXPERIENCES

As the importance of health and well-being continues to increase, the hospitality industry will need to adapt and innovate to stay competitive. The future will likely see more collaborations between chefs, nutritionists and health professionals to create menus that deliver both culinary delight and health benefits. Health is expected to continue to be a key consideration in the design of hospitality experiences. The industry players who can seamlessly integrate well-being into their offerings will be well-positioned to lead in this new era. The inclusion of mental health-focused foods, whether through mood-enhancing ingredients or gut-health options, will also be an essential part of this future landscape.

The rise of health-conscious consumers signals a major opportunity for the hospitality sector to reshape its approach to food and guest experiences. By offering innovative, health-focused options, the industry can cater to the growing demand for well-being, positioning itself at the forefront of this transformative trend. Innovators such as Mude, a member of the EHL Innovation Hub, are supporting the hospitality industry in its transition toward well-being centered experiences.

Swiss startup Mude integrates wellness into hotel operations through in-room guided practices, curated workshops and personalized recommendations for local wellness spots. By addressing common travel challenges like jet lag and stress, Mude transforms hotels into wellness hubs, fostering a sense of community through fitness classes and social events, including food experiences, while utilizing underused spaces to generate revenue.

This movement is not a passing phase but a shift in how consumers view food and hospitality—one that will shape the future of the industry for years to come. The convergence of health and culinary experiences is an exciting area of growth, offering both challenges and opportunities for hospitality providers to redefine what it means to nourish and care for their guests.

Accor's well-being philosophy and business model serve as a benchmark within the hospitality industry, positioning it as a leader in holistic guest experiences that prioritize health, happiness and sustainability. By embedding well-being into its core, Accor not only meets the expectations of modern travelers but also secures a competitive advantage and feeds into long-term guest loyalty in a rapidly evolving market.



CASE ACCOR

Accor's rebranding from "wellness" to "well-being" reflects its commitment to addressing the holistic health needs of modern travelers. Emlyn Brown, Global SVP of Well-Being, emphasizes this shift, stating that well-being integrates wellness practices like fitness and spa treatments into every aspect of the guest journey. "Wellness is no longer an adjunct; it's central to the hospitality experience," notes Brown, highlighting how Accor's luxury properties focus on health, happiness and vitality throughout the guest stay.

This strategy aligns with strong business potential, as wellness travelers spend 56% more on property and are 38% more likely to rate their stay highly, driving repeat bookings and positive word-of-mouth. Recognizing this, Accor embedded its well-being efforts within its core strategy and marketing framework, ensuring they are not treated as peripheral offerings.

Accor's six-pillar well-being framework addresses key aspects of holistic health and property examples:

Active nutrition: Raffles London integrates wellness-focused dining through its Pillar Kitchen & Juice Bar.

Holistic design: Properties like Fairmont Chateau Lake Louise feature eco-conscious and sensory-focused designs to promote mental and emotional well-being.

Bodies in movement: Initiatives like Fairmont Fit offer premium fitness options and outdoor activities to encourage movement.

Spa innovation: Advanced treatments like biohacking therapies at Fairmont Spa Century Plaza redefine the hotel spa experience.

Mindfulness, sleep & recovery: Features like Sofitel's MyBed and Raffles Sleep Rituals prioritize restful, rejuvenating sleep.

Digital balance: Digital detox opportunities and wellness technology enhance personalized experiences while promoting mental wellness.

INDUSTRY RECOMMENDATIONS

Seek inspiration from 'Food as Medicine' or 'Blue Zone' concepts: Prioritize nutrient-rich, whole foods and anti-inflammatory ingredients to promote health and longevity through preventive healthcare principles.

Collaborate with experts: Partner with nutritionists, chefs and health professionals to create menus that blend wellness and culinary appeal.

Incorporate digital tools: Use apps and platforms to personalize guest experiences, improve access to wellness resources and encourage social connections through food.

Integrate health-focused menus: Include plant-based dishes, gut-friendly ingredients and functional meals to meet the needs of health-conscious consumers.

Leverage wellness trends: Expand offerings like non-alcoholic beverages and wellness-focused dining to align with the demand for socially inclusive, health-conscious options.

Measure impact on guest well-being: Regularly assess guest satisfaction and health outcomes to refine offerings and ensure alignment with trends.

Promote personalized nutrition: Use technology to tailor food experiences to individual dietary needs and health goals, enhancing guest satisfaction and loyalty.





TREND No. 5

PLANETARY WELL-BEING: THE INTERSECTION OF FOOD AND SUSTAINABILITY

The interconnectedness of human health and planetary well-being has emerged as an important trend. The concept of 'Good for People, Good for Planet' reflects a growing recognition that food choices impact both personal health and the sustainability of our ecosystems. Today's consumers are increasingly aware of this and seek experiences and offerings that prioritize both elements. In response, industry trailblazers are reimagining their offers - leveraging regenerative practices, embracing plant-forward or planetary diet menus and are looking at innovative food waste solutions. This trend signifies a great opportunity: hospitality that aligns human well-being with environmental stewardship, creating a future where thriving individuals and a thriving planet are linked.

The connection between sustainability and food is central to discussions on climate change and nutritional security. With a growing global population and limited resources, the current food system—responsible for significant greenhouse gas emissions, deforestation, water use and biodiversity loss—faces increasing scrutiny. Addressing these challenges requires a systemic shift in how food is produced, distributed and consumed.

Advancing sustainable diets, minimizing food waste and prioritizing responsibly sourced ingredients are important steps toward a future where food supports both human well-being and environmental health. Collaboration among farmers, policymakers, chefs and consumers is essential to building a food system that is functional and interconnected.

THE ROLE OF SUSTAINABLE AGRICULTURAL PRACTICES IN HOSPITALITY

The hospitality industry has the opportunity to lead sustainability efforts through the support of advanced agricultural methods. By integrating practices such as regenerative farming or precision agriculture within the supply chain^[90], the sector can significantly improve food quality while reducing its environmental footprint. These approaches promote enhanced resource efficiency and support the cultivation of nutrient-dense crops through healthier soils. On the other hand, vertical farming provides a forward-thinking solution for urban and resource-constrained areas by using stacked layers and controlled environments to grow fresh produce.

Vertical farms, as well as simple restaurant gardens, can easily be managed within hospitality outlets directly. Such solutions eliminate the need for pesticides^[91-93]. As a result, hospitality businesses are better positioned to provide guests with high-quality meals that align with environmental responsibility^[94]. Beyond environmental benefits, these practices support food equity and justice by promoting systems that prioritize local, seasonal and natural ingredients. Hospitality providers can specifically curate menus that reduce food miles, lower carbon footprints and support local economies.

"From farm to fork, the Middle East is embracing a local sourcing revolution — supporting regional agriculture and sustainability."

Mira El Ghaziri , Managing Director, HealthyPath

Collaborations between regenerative farms and hospitality businesses showcase the practical application of these principles. The *Living Soils Community Learning Farm in South Africa*, for example, partners with Woolworths and Spier Wine Farm to supply locally grown, regenerative produce to nearby establishments, bolstering both food security and sustainability. Similarly, *New York's Stone Barns Center for Food & Agriculture* has teamed up with *Blue Hill at Stone Barns* to create dishes using ingredients sourced from innovative farming methods.

"Biodiversity-driven regenerative methods are not only more sustainable but also nutritionally superior compared to agro-industrial productions."

Valeria Calamaro, Marketing and Sustainability, Altrromercato

By integrating solutions like vertical farming, their own gardens, alongside sourcing from regenerative and local producers, hospitality businesses are playing an important role in building a sustainable and resilient food system. At the same time, they can bring flavorful and nutrient dense ingredients to their customers and employees.

CASE **cultifutura**

Cultifutura, Italy: An interesting development for the hospitality space is a vertical farming innovation project called Cultifutura. Co-founded by Emilia Konert, it is targeting the hospitality sector with a high-tech, Italian-designed vertical farming solution that fits into urban and hospitality settings like restaurants, hotels and cafes. Aimed at high-end establishments, Cultifutura's box systems allow chefs to grow fresh, nutrient-rich produce on-site, minimizing the environmental impact through water-efficient, pesticide-free, LED-supported cultivation. This innovative model addresses the growing consumer demand for sustainability, transparency and connection to food sources, while also bringing the "farm-to-table" experience closer. By also integrating these systems in offices and schools, Cultifutura educates and reconnects people with the natural food cycle, fostering a renewed appreciation for fresh ingredients in urban environments and regions with limited access to traditional farming.

CASE **Bustanica**

Bustanica, UAE: An industry trailblazer headquartered in the arid landscapes of Dubai, Emirates, has set a new standard in sustainable food production by opening the world's largest vertical farm, Bustanica, in partnership with Crop One. This impressive 330,000-square-foot facility produces over a million kilograms of leafy green vegetables each year, including varieties like spinach, lettuce and arugula, which are served on Emirates flights. Utilizing advanced hydroponic technology, Bustanica operates without pesticides, herbicides, or chemicals, while using 95% less water than traditional farming. The farm is designed to optimize resources and reduce environmental impact, aligning with Emirates' commitment to sustainability. By producing fresh, high-quality greens locally, Bustanica also reduces reliance on imports and ensures a consistent supply of nutritious produce, even in the challenging climate of the UAE.

Innovative Farming Practices for Enhanced Health and Nutrition

Farming practice	Description	Nutritional outcomes	Ref.
Regenerative agriculture	Focuses on improving soil health through practices like cover cropping and reduced tillage.	Enhances nutrient density in crops, leading to higher levels of vitamins and minerals such as magnesium, calcium, and zinc. Promotes healthier food with anti-inflammatory compounds.	[95]
Vertical farming	Involves growing crops in stacked layers or vertically inclined surfaces, often using controlled environments.	Can improve access to fresh produce in urban areas, potentially increasing dietary diversity and nutritional intake. Reduces reliance on pesticides and can lead to healthier food options.	[96]
Agricultural extension	Provides education and resources to farmers about sustainable practices and nutrition-sensitive agriculture.	Enhances knowledge on nutrition and farming techniques, leading to improved dietary practices and health outcomes. Supports community-based initiatives that promote better nutrition.	[97]
IoT farming	Utilizes Internet of Things technology to monitor and manage agricultural practices for efficiency.	Can lead to optimized resource use, resulting in healthier crops and improved nutritional quality through precise farming techniques. Facilitates data-driven decisions that enhance food quality.	[98]
Climate-smart agriculture	Integrates practices that aim to increase productivity while reducing greenhouse gas emissions and enhancing resilience to climate change.	Promotes sustainable food systems that can improve food security and nutritional outcomes by ensuring consistent quality and availability of food. Encourages practices that enhance soil health, impacting crop nutrition positively.	[99]



THE IMPACT OF FOOD WASTE

Another critical component of the relationship between food and sustainability is the challenge of food waste. Globally, about one-third of all food produced for human consumption is lost or wasted^[100]. Food waste occurs at every stage of the supply chain, from farming to production to processing to consumer disposal. This not only represents a significant waste of resources but also contributes to unnecessary greenhouse gas emissions. Wasted food creates a particularly vicious circle: the energy used to grow, harvest and transport the food is dissipated, in parallel with the decomposition of food waste in landfills that releases methane (a potent greenhouse gas).

Addressing food waste is a key strategy for improving the sustainability of the food system. By reducing food waste at all levels, from farm to table, societies can significantly reduce the environmental burden of food production and ensure that more food reaches those who need it.

Effectively addressing food waste requires distinguishing between **prevention** and **management**, as outlined in the food waste hierarchy.^[101] Prevention, the most impactful approach, focuses on reducing waste before it occurs by improving planning, portioning and operational efficiency. For food services, this means prioritizing actions such as precise inventory management, menu planning and staff training to minimize overproduction and spoilage. Measuring waste plays a critical role in creating awareness and identifying inefficiencies, which can then be addressed through targeted training programs. Only after these preventive measures have been exhausted should strategies like recycling, composting and donation come into play to manage unavoidable waste.

On the consumer side, prevention is equally essential. Initiatives such as awareness campaigns, nudging strategies and education efforts can help reduce plate waste. For instance, discouraging buffets or offering smaller portion sizes can significantly cut down on leftovers. By shifting consumer habits and expectations through informed choices, the hospitality industry can address waste at its source, promoting a culture of mindful consumption that aligns with sustainability goals.

This hierarchical approach ensures that resources are directed where they have the greatest impact, aligning environmental, social and economic outcomes in the journey toward a zero-waste food system.

Technology plays an essential role in modernizing food service operations. Bon Appétit, for example, developed proprietary systems for menu management and waste tracking, enabling chefs to integrate nutrition data and labeling into their workflows. These tools enhance transparency while supporting sustainable practices and compliance with regulations.

Innovators like [KITRO](#) and [WINNOWN](#) are also leading the way in empowering the hospitality industry to tackle food waste effectively.

These companies, alongside forward-thinking industry leaders, show that reducing food waste requires both innovative tools and an organizational commitment to sustainable practices. By utilizing data-driven solutions and rethinking ingredient usage, the hospitality industry can make significant steps in waste reduction and contribute to a more sustainable food system.



Founded by EHL graduates and members of the EHL Innovation Hub, [KITRO](#) offers AI-driven solutions that monitor food waste in kitchens, providing insights into waste sources and suggesting corrective actions. KITRO's approach enables restaurants to significantly cut waste, reduce costs and improve operational efficiency by transforming waste data into actionable strategies. Similarly, [WINNOWN](#) Solutions employs smart technology to track and analyze kitchen waste, helping foodservice businesses identify patterns and make data-driven decisions to minimize waste. Winnow's technology has been adopted by numerous hospitality groups globally, demonstrating how innovation in waste monitoring can lead to impactful changes.



CASE



The PLEDGE on Food Waste certifies 55 Marriott Hotels. Marriott International partnered with The PLEDGE on Food Waste to certify 55 hotels across the UK, Ireland and Iceland, achieving a 25% reduction in food waste within six months (January-June 2024).

Staff training: Over 1,000 hospitality professionals, including chefs and F&B executives, were trained to efficiently embed The PLEDGE into their daily operations.

Adaptation of procedure: 95 criteria used to implement best practices related to portion control, forecasting, food waste monitoring system and landfill diversion.

Guest engagement: QR codes on menus showcased sustainability efforts, while 109 zero-waste dishes were introduced to reduce plate waste.

Partnerships: Collaborations with food banks and Too Good To Go helped redistribute surplus food, with unavoidable waste diverted to compost or recycling.

Impact: In only 6 months, the program saved 215,900 meals, reduced emissions by 486 tonnes of CO₂e and demonstrated the business case for sustainability through cost savings and operational efficiency. 53 hotels achieved GOLD certification and 2 obtained SILVER.

CASE



McDonald's, as a global leader in fast food, has implemented strategies to reduce food waste across its supply chain and restaurants. The company collaborates with suppliers and food banks to redirect surplus food to communities in need. In its restaurants, advanced forecasting technology aligns food preparation with real-time customer demand, minimizing overproduction. Additionally, McDonald's incorporates composting and recycling programs in certain markets to divert waste from landfills, showcasing how large-scale hospitality brands can address food waste through innovation and collaboration.

The hospitality industry serves millions of meals daily, giving it immense potential to influence food systems and reduce waste.

“Train your employees and also engage in a conversation with your customers. Keep an eye on your food, think of what kind of food waste is avoidable and what is unavoidable.”

EHL Associate Professor of Management, Dr. Carlos Martin-Rios

By creatively using leftover ingredients and promoting dishes that make use of the entire ingredient, food outlets can set an example for reducing waste in restaurants and at home. Experts have highlighted the need for chefs to focus on reducing waste through careful menu planning and ingredient utilization, as well as the application of technology ensuring that as little as possible goes to waste. Research shows that shifts in food consumption patterns towards better diets can serve both environmental sustainability and public health objectives. This dual benefit emphasizes the significance of avoiding food waste to promote these dietary changes^[102].

At the same time, former Chief Strategy Advisor at Bon Appétit Management Company, Maisie Ganzler, highlights the challenges of aligning sustainability goals with operational realities. She explains that consumers expect food to fulfil a growing list of demands, including health, sustainability, customization and transparency. However, these expectations often clash with the practical limitations of the food industry, which cannot scale or adapt as easily as technology.

For example, while flexible menus allow for food waste reduction, transparency and accountability require recipe-based systems that can standardize nutrition and sourcing practices. Balancing sustainability targets, such as reducing climate impact or increasing plant-forward meals, with diverse customer needs is an ongoing challenge.

“Expectations and our operational limitation create a tension between what consumers desire and what is feasible, requiring the industry to strike a balance between innovation and practicality.”

Maisie Ganzler, Author and retired Chief Strategy Advisor at Bon Appétit Management Company

THE ROLE OF SUSTAINABLE DIETS

The hospitality industry is increasingly embracing sustainable diets, those that benefit both human health and the planet, as a response to growing environmental and health challenges. According to the Food and Agriculture Organization, sustainable diets are defined as nutritionally adequate, safe, healthy and environmentally friendly^[103]. This includes adopting plant-forward and plant-based approaches, which prioritize plant-derived foods like vegetables, fruits, legumes and whole grains while reducing reliance on resource-intensive animal products. The [*EAT-Lancet*](#) Commission's planetary health diet serves as a guiding framework, promoting these principles to mitigate environmental impacts such as greenhouse gas emissions, deforestation and water scarcity while improving global health outcomes.

Hospitality players, from fine dining establishments to large-scale catering companies, are adapting to the growing demand for sustainable and healthy dining options reflecting the fact that 36% are referring to themselves as flexitarians^[104]. Plant-based foods generally require fewer resources to produce, including less land, water and energy, making them a vital component of environmentally responsible menus^[105]. Contrary to the misconception that eating healthy is more expensive, sustainable diets focusing on plant-based foods are both healthier and more affordable than conventional eating habits ([*Oxford, 2021*](#)). On average, these dietary choices can reduce food costs by up to one-third, proving that nutritious and eco-friendly eating is accessible to a broader population, while at the same time reducing health related costs.

“The restaurant and food service industry has a huge opportunity and significant influence in our collective plant-forward future, especially given that the average American consumer spends 56% of their food dollars outside of the home.”

Michiel Bakker, CEO of CIA

Industry leaders such as Michelin-starred chefs Omar Shihab, Alain Ducasse and Daniel Humm are active proponents of the way plant-forward cuisine can be equally indulgent and sustainable, while companies like [*Dusmann Catering*](#) make these options accessible to a broader audience.



THE ROLE OF SUSTAINABLE FINE DINING

Fine dining restaurants hold an important position in shaping the future of sustainable diets combined with sustainable sourcing, as they influence not only their patrons but also the broader hospitality and food service industries.

These establishments set a standard that demonstrates how sustainability can coexist with exceptional quality and luxury.

CASE **Boca**

Boca, located in Dubai's International Financial Centre and led by Omar Shihab, redefines sustainability in the food and beverage industry by addressing the challenges of operating in an arid environment where 90% of food is imported. The restaurant prioritizes local sourcing, creative cooking techniques like fermentation and transparency in its operations to minimize waste and celebrate authentic, plant-based, gluten-free options. Boca serves as a platform for change, collaborating with local producers and AgriTech innovators to explore sustainable practices while openly sharing its processes with guests to build trust and raise awareness.

CASE ELEVEN MADISON PARK

Another prominent example is *Eleven Madison Park*, the famed New York restaurant led by Chef Daniel Humm. In 2021, the restaurant made headlines by transitioning to a fully plant-based menu, marking a bold step in the fine dining world. Humm's decision to remove animal products was driven by the need to reduce the environmental impact of food production while delivering creative, Michelin-star-quality dishes that focus on the natural flavors and textures of plants. This shift aligns with the principles outlined in the EAT-Lancet report, proving that top-tier cuisine can be both sustainable and exquisite.

CASE **sapid**

World-renowned chef Alain Ducasse, holder of 20 Michelin stars, is one of the most prominent figures leading the plant-forward revolution. His Parisian restaurant, *Sapid*, is a shining example of how plant-based menus can deliver refined, flavorful dishes without relying on animal products. At Sapid, Ducasse showcases the diversity and richness of vegetables, grains and legumes, creating dishes that are both satisfying and environmentally responsible. His goal is to challenge the traditional meat-heavy offerings in haute cuisine by showing that plants can take center stage on the plate in terms of taste, nutrition and experience.



BEYOND FINE-DINING ESTABLISHMENTS

It's not just fine-dining restaurants embracing plant-forward eating, everyday food outlets play a critical role too. Chef, doctor and food journalist, Federico Ferrero, emphasizes that establishments serving regular customers have both a significant responsibility and an opportunity to influence healthier choices. He claims that any type of restaurant can integrate wellness and sustainability into routine menus, influencing healthier habits among regular customers.

"Sustainability isn't an exclusive club—every restaurant from sushi to kebabs can make a difference."

Omar Shihab, Founder and General Manager, BOCA

Catering companies can play a significant role in this shift as they provide a platform to reach a wider range of consumers and in particular daily eaters. Flexibility and agility in food service operations enable rapid adaptation to these trends, allowing chefs to experiment with innovative, climate-conscious options daily. This adaptability is particularly valuable in catering, where plant-forward offerings address consumer health concerns, enhance business reputation and align with ethical commitments^[106].

Transparency once more plays a crucial role in this transformation, with consumers increasingly seeking clear information about food sourcing and its environmental impact. Guides like Have A Plant: Plant-Forward Eating describe the importance of educating diners and offering evidence-based insights to foster trust and confidence in sustainable dining choices.

"The real luxury in food isn't caviar or champagne — it's fresh, flavorful vegetables."

Federico Ferrero, Chef, Medical Doctor, Nutritionist & Food Journalist



CASE DUSSMANN GROUP

Dussmann Group, a long-time leader in the food service industry, is undergoing a remarkable transformation driven by a deep awareness of the planetary health crisis. For decades, they served traditional meals in businesses, hospitals, schools and kindergartens, but about five years ago, they made a bold decision to shift their focus toward sustainability. Inspired by The Lancet's Planetary Health Diet, which calls for a diet that balances human health with environmental sustainability, Dussmann began a ten-year journey to reduce the environmental impact of every dish they serve.

Their approach has been gradual but strategic, embracing digital tools to streamline operations and introducing the new diet one meal at a time, allowing their clients and employees to adapt comfortably. By leveraging AI for supply chain management and using storytelling techniques to inspire cultural shifts within the company, they have successfully introduced these menus in 50 of their 400 canteens, with plans to double that number in the next two years. This transformation has not only reduced Dussmann's environmental footprint but also engaged employees and satisfied clients, proving that a sustainable approach can lead to both operational success and market leadership.

Looking forward, Dussmann is committed to fully adopting the Planetary Health Diet across all its locations by 2035, continuing to explore plant-based innovations and using technology to drive further efficiencies. Their journey highlights the importance of aligning environmental and business goals, making them a model for the future of food service.

"Sustainability isn't just a marketing tool, it's part of the DNA of every responsible company" - Head of Global Food Service Transformation, Dussmann Group.



THE SOCIAL EQUITY QUESTION

The social dimensions of sustainable diets are critical yet often underexplored in food systems' discussions. Scientists^[107] explain that sustainable diets should not only reduce environmental impacts but also prioritize social equity, including fair wages, safe working conditions and equitable access to nutritious food. They highlight the interconnected nature of these challenges, advocating for systemic changes to address resource-intensive dietary practices while safeguarding vulnerable populations across agricultural and food supply chains.

Transitioning to plant-forward and planetary health diets offers considerable environmental benefits but also introduces social trade-offs. For instance, the reliance on low-wage and migrant labor in plant-based food production points to the importance of integrated approaches that address both social inequities and environmental goals. They call for stronger institutional policies, such as fair-trade certifications and living wage mandates to mitigate these disparities and promote equitable transitions^[107].

Without embedding social equity into sustainability frameworks, broader goals for sustainable diets risk becoming unattainable. Collaborative efforts and comprehensive metrics are essential to ensure that transitions benefit all stakeholders fairly. Initiatives like the *Social Gastronomy Movement* address these challenges by leveraging food's potential to promote social inclusion, combat inequality and build resilient communities through globally co-created principles.

Embedding social equity at the core of sustainability frameworks is not just a moral imperative but a practical necessity for achieving truly sustainable food systems that balance environmental integrity, economic viability and human dignity.

“Only through collaboration can we transform the food system and there’s a dire need for that due to planetary health and human health crises.”

Christina Senn-Jackobs, CEO, SFNV

THE IMPORTANCE OF MEASURING IMPACT

Effectively measuring impact is another ongoing challenge in the industry, yet it is essential for driving accountability and aligning efforts with global sustainability goals. Hospitality players have an opportunity to collaborate with startups such as *Food2050* or to develop their own tracking systems to address this need. Food2050, a Zurich-based startup founded by EHL graduate and EHL Innovation Hub member Christian Kramer, is transforming how food businesses approach sustainability.

Drawing from his experience in sustainable restaurant management, Kramer and his team created Food2050 to address the gap in the hospitality industry's ability to measure and scale sustainable practices effectively. Their digital platform assesses recipes for both climate impact and nutritional value, integrating seamlessly into existing kitchen systems without requiring major operational changes, making it accessible for food service outlets to support planetary efforts.

Additionally, Food2050 provides users with transparent tracking of sustainability goals, making it easier for consumers and businesses to understand the environmental and health implications of their food choices.

Whether through partnerships with platforms such as Food2050 or by innovating proprietary systems, hospitality players can take meaningful steps to quantify and improve their sustainability practices. Measuring impact not only ensures that sustainability claims are credible but also helps identify areas for improvement. This in turn enables businesses to refine their strategies and contribute meaningfully to global environmental objectives. By aligning everyday decisions with broader targets, such as the Paris Climate Agreement, Food2050 and similar initiatives enable informed, responsible dining practices that contribute to a more sustainable food landscape.

THE THIRD WAVE OF PLANT-BASED INNOVATION

In addition to flexitarianism and sustainable diets, another key trend in plant-based innovation is the emergence of the third wave of plant-based foods. This encompasses shifting the focus from mimicking meat to celebrating the inherent qualities of plants. While earlier plant-based innovations sought to replicate the taste, texture and appearance of animal products, this new wave embraces the uniqueness of whole ingredients such as vegetables, grains, legumes and seeds.

“Third wave plant-based foods celebrate vegetables and grains in their own right—not just mimicking meat.”

Sophie Egan, Co-Founder of Climate Kitchen, Author and NYT Journalist

As flexitarian diets grow in popularity, consumers are increasingly seeking plant-based options that go beyond imitation. Plant-based meat alternatives are often criticized for being ultra-processed, raising concerns about their nutritional value compared to whole food options. This demand for transparency and simplicity has led to the rise of third-wave offerings that highlight the versatility and wholesomeness of plant-based ingredients^[108].

“Consumers want plant-based meat alternatives, but many don’t understand what’s behind the product — it’s often heavily modified and far from natural.”

Patrick Ogheard, Dean EHL School of Practical Arts

Additionally, cultural specificity in sustainability is critical for ensuring widespread acceptance of these innovations. Food culture profoundly shapes dietary choices and sustainable or health options are not always universally embraced. Adapting food innovations to align with local customs and tastes can help towards a more inclusive approach to sustainability, meeting consumers where they are and encouraging more lasting dietary shifts.

Through these adaptable, culturally aware approaches, the conscious consumer movement can become more than a trend, transforming individual habits into broader, impactful change across markets. A good example here is [Switch Foods](#) in the UAE that offers culturally inspired, chef-crafted, plant-based proteins designed to suit a variety of culinary preferences. By focusing on authentic flavors and textures, they provide a thoughtful approach to plant-based eating that aligns with cultural traditions and sustainability.



CASE



Annie Ryu, founder of [The Jackfruit Company](#), has turned jackfruit into a versatile and sustainable option for flexitarians—those looking to reduce meat consumption without heavily processed alternatives. With products like BBQ jackfruit, Tex-Mex fillings and Tikka Masala, along with the Jack & Annie's line offering nuggets, sausages and meatballs, the company highlights jackfruit's natural meat-like texture and versatility. By working directly with over 1,700 farming families and creating a sustainable supply chain, Ryu has built a brand that supports farmers while offering consumers a healthy, delicious and environmentally friendly way to rethink their meals.

The third wave of plant-based innovation is also helping to dismantle the misconception that plant-forward diets are niche or elitist. By using everyday ingredients and celebrating their natural qualities, these innovations make plant-based eating more approachable for mainstream audiences.

CELEBRATING PLANTS IN THEIR OWN RIGHT

In this same context, there is a necessity to move beyond generic terms like ‘veggie lasagna’ and value the vegetables on our plates by naming them explicitly, for example ‘eggplant and zucchini lasagna’. Highlighting the specific vegetables not only elevates their importance but also enhances the dining experience by connecting diners with the flavors and origins of the food. This small change in how we label food can transform the perception of vegetables, encouraging people to appreciate their diversity, textures and tastes.

Similarly, when we label restaurants as exclusively ‘vegan’, it can unintentionally alienate non-vegan diners. With the rise of flexitarianism, more people are looking to reduce their meat consumption and incorporate more plant-based options into their diets without fully committing to a vegan lifestyle. Many would gladly choose options that focus on vegetables and plant-forward meals, but the word ‘vegan’ might carry certain connotations that dissuade them. Instead, emphasizing plant-forward or vegetable-centered cuisine without the “vegan” label may appeal to a broader audience, inviting diners to explore healthy, delicious and sustainable meals without feeling excluded or boxed into a particular food category.

The *Menu Language Workbook from Food for Climate League* offers a practical, step-by-step guide for hospitality professionals to enhance plant-forward menu descriptions. Designed to appeal to a wide range of diners, this tool helps teams develop language that makes sustainable, plant-based dishes more accessible and attractive. By optimizing menu descriptions, hospitality providers can support healthier and more climate-friendly dining choices without sacrificing guest interest or satisfaction. This workbook aligns with the rising consumer trend of prioritizing sustainability and can help businesses engage customers in a meaningful shift toward plant-forward eating.

CASE



A good example of this approach is Denise Monroy's restaurant, *Elektra Punk and Food*, in Bogotá, Colombia. Her restaurant focuses on offering creative plant-forward dishes without marketing strictly as vegan. This approach allows her to attract a more diverse customer base, including those who may not typically seek out vegan options. By highlighting the unique qualities of the vegetables and the artistry in their preparation, Elektra Punk and Food is making plant-based dining more accessible and enjoyable to all, in a fun and relaxed environment, while still maintaining a focus on sustainability and nutrition.

Denise's approach highlights the importance of culinary storytelling and inclusivity. She believes in making vegetables the star of the plate in a way that appeals to everyone, not just those with specific dietary labels. This strategy helps to broaden her restaurant's appeal and promote an appreciation for the variety and richness that vegetables bring to the table.

As the movement continues to grow, it represents a significant step toward reshaping our relationship with food and sustainability. By moving beyond meat mimicry and celebrating plants for what they are, the third wave is helping to redefine plant-forward eating as a satisfying and accessible choice for everyone.



INDUSTRY RECOMMENDATIONS

Educational menus: Use menus and marketing materials to inform guests about the environmental impact of their food choices.

Plant-based innovation: Offer culturally relevant, plant-based or plant-forward dishes to cater to environmentally conscious consumers.

Seasonal and local foods: When suitable, prioritize locally sourced, seasonal ingredients to enhance sustainability and flavor.

Sourcing transparency: Clearly communicate ingredient origins and sustainability practices to build consumer trust.

Supplier engagement: Encourage responsible production and sourcing among suppliers to reduce emissions and waste.

Sustainable sourcing: Prioritize regenerative agriculture and sustainable sourcing practices for nutrient-dense foods.

Waste reduction: Implement strategies like repurposing surplus food and better forecasting to minimize food waste.





TREND No. 6

SOCIAL EATING: BUILDING COMMUNITIES THROUGH FOOD

In recent years, loneliness and mental health challenges have come to the forefront, worsened by the pandemic's isolation and an increasingly fast-paced, digitalized world that often leaves individuals feeling disconnected. Amid this surge in mental health issues, ranging from anxiety to depression and chronic stress, many struggle to find meaningful social interactions in their daily lives. Social eating and community focus have emerged as powerful antidotes and trends, offering people emotional and social nourishment that goes beyond what current dining experiences typically provide.

Social eating refers to the practice of consuming food in the presence of others, encouraging interpersonal connections and communal engagement. It is a socio-cultural activity shaped by shared meals, rituals and contexts, which enhances social cohesion, promotes cultural identity and contributes to overall well-being. This concept encompasses both informal and structured eating scenarios, highlighting the role of food as a medium for social interaction, communication and the formation of collective experiences. This definition aligns with interdisciplinary studies in anthropology, sociology and public health that explain food's role in creating and sustaining social bonds^[109-111].

THE INTER-RELATIONALITY OF FOOD

Historically, food was a core element of communal life, connecting people to the land and each other. Food is an inherently convivial experience, offering warmth and nourishment not only for the body but also for the soul. Coming together around food helps to build trust, empathy and creates shared memories, reinforcing social cohesion in a fragmented world.

“Food has always been social – we have just disconnected from that idea.”

Alain Ducasse, Michelin star Chef and Restaurateur

However, industrialization and global supply chains have distanced consumers from the origins of their food and this disconnection from food sources has paralleled a social disconnection. Today, there is a growing movement to reintegrate food into communal spaces and reconnect people with the origins of what they eat, a trend that speaks to a deeper desire for authenticity, tradition and community.

“Communal eating is a cornerstone of human connection and well-being, deeply ingrained in our culture and essential for fostering meaningful relationships.”

Christian Hammerle, Head of Global Food Service Transformation,
Dussman Group

Research from the University of Oxford highlights the importance of communal dining in creating social bonds and a sense of belonging^[112]. According to this study, people who regularly eat with others are more likely to feel content and connected to their communities, suggesting that shared meals are a powerful tool for improving mental and emotional well-being^[112]. Communal dining creates opportunities for people to engage in meaningful conversations and connections, something that is often missing in a society dominated by fast, solitary meals.

Food should be seen as a medium that connects individuals on multiple levels, physical, emotional and spiritual, therefore contributing to eudaimonia well-being. Chef, food educator and author, Charles Michel, speaks to the relational exchange that occurs during communal meals, where the warmth of human connection extends beyond the act of eating to include the cultural and ecological relationships embodied in the food itself. He highlights the transformational potential of these moments, arguing that they move us from transactional relationships with food to relational ones, where the act of eating becomes an expression of care for others, our environment and ourselves.

Restaurants that offer communal seating and shared dishes create spaces where guests can engage in meaningful interactions, offering a counterbalance to the sense of isolation prevalent in today's modern society.

By emphasizing these connections community-building around food is not only a path to personal and social well-being but also a cornerstone of inclusive and regenerative food systems. This relational approach to food can inspire people to make choices that prioritize taste and pleasure in parallel with societal and ecological considerations, creating a ripple effect of positive change.



FOOD EXPERIENCES AS A REMEDY FOR ISOLATION

In today's urban, tech-driven environments, social dining and community eating offers a remedy to the isolation that has become all too common. EHL Assistant Professor of Marketing, Dr. Maggie Chen, highlights the role of hospitality vibes that can be defined by the warmth of the welcome of an establishment to the simple gestures such as encouraging guests to pour wine for each other in breaking down social barriers and instilling a sense of connection. These curated dining experiences extend beyond food to the people around the table and the dining experience itself.

Emlyn Brown, SVP Well-Being at Accor Group, emphasizes the increasing demand for "social wellness," particularly among younger generations. Unlike traditional wellness, which was more individualistic, social wellness focuses on collective experiences, such as group fitness classes or communal dining rituals, again feeding into the trend of social eating.

"We are reconnecting with food as the most tangible way to connect our souls in an increasingly disconnected world."

Rania Moualla, Founder, President and Chairwoman, ZADK

As the mental health crisis grows, chefs and restaurateurs are playing a critical role in shaping dining experiences that are designed to combat these challenges. By creating environments that prioritize social interaction, they are not only serving food but also offering spaces where people can find comfort and connection. EHL Professor and chef, Dr. Marc Stierand, believes food experiences are a form of "soul work," impacting mental well-being by offering a comforting and grounding presence in a world often marked by stress and digital overwhelm.

"The future of food is not just about high-tech solutions; it's about social innovations that bring communities together."

Sara Roversi, CEO and Founder of the Future Food Institute

Technology is also stepping in to bridge social gaps through food. Platforms such as [Eatwith](#) and [VizEat](#) team up users with local hosts for home-cooked meals, creating an opportunity for travelers and locals to engage in cultural exchanges over food. These shared dining experiences help develop new friendships and alleviate urban isolation. Additionally, apps like [Tandem](#) connect users based on shared interests, facilitating casual meetups around food that can lead to lasting bonds. By making social dining accessible and interactive, these platforms promote inclusivity and reach diverse audiences who seek connection through food.



CASE KANALHUSET



In the hospitality industry, certain trailblazers are redefining the dining experience by focusing on social interaction and community. [Kanalhuset](#), a hotel in Copenhagen, invites guests to join communal meals at long tables, embracing the Danish concept of "fællesspisning" (community eating). This model encourages guests to connect with locals and other travelers, instilling a welcoming environment that prioritizes meaningful interaction where hospitality spaces are designed not for solitude but for shared experience.

Restaurants like [IHOP](#) and [Olive Garden](#) in the United States, also play significant roles in encouraging social connection. IHOP's casual, welcoming setting allows people from different backgrounds to come together for affordable meals, creating a socially inclusive space where economic barriers are minimized. Olive Garden's emphasis on family-style dining resonates with diners looking for a home-like experience, where the act of sharing food reinforces a sense of togetherness. Both establishments embody the spirit of social eating and community, using food to create environments for people looking to relax, connect and strengthen community bonds.

COMMUNITY WELL-BEING

The intersection of hospitality and community wellbeing is emerging as a pivotal focus for both consumers and businesses. With the growing return of social eating and increased demand for meaningful connections, the hospitality industry has an opportunity to transcend its traditional role of creating experiences for its clients by nurturing deeper engagement with local communities. This shift highlights how shared food experiences and community-driven initiatives can create positive social impacts while addressing consumer desires for authenticity and purpose in their travels or food experiences.

Hospitality businesses operate within diverse communities, influencing the economy as well as the social fabric of the areas they serve. Increasingly, tourists are seeking experiences that connect them meaningfully with local cultures and contribute positively to community well-being. Volunteer tourism, for example, has grown in popularity as travelers look to support local initiatives while engaging in cultural exchange. Studies show that such activities enhance mutual understanding, empower local stakeholders and provide direct economic benefits^[113]. However, the approach to these experiences must be intentional, ensuring that they are genuinely beneficial and respectful of local cultures to avoid perpetuating power imbalances.

The principles of social gastronomy further highlight the transformative potential of food within communities. Beyond nourishment and pleasure, food serves as a medium for storytelling, cultural preservation and social inclusion. Hospitality and Food brands can adopt these principles to design dining experiences that emphasize communal tables, local ingredients and inclusive practices, thereby strengthening the bonds between guests and the broader community.

By collaborating with local organizations and communities and promoting local community engagement, hospitality businesses can create experiences that align with the growing consumer preference for responsible dining and travel. Companies like [Airbnb](#) exemplify this with their 'Airbnb Experiences' program, connecting travelers with local artisans, guides and hosts to provide immersive cultural interactions.

Some hospitality providers are actively incorporating community wellbeing into their brand strategies. [Sheraton Hotels'](#) recent rebranding with a community focus demonstrates how shared spaces and community-building activities can enhance guest experiences while supporting local cultures. Similarly, partnerships between hotels and local suppliers or artisans contribute to more resilient supply chains, benefiting both the business and its surrounding community.

As hospitality evolves, community well-being is becoming central, driven by a growing demand for purposeful travel and meaningful connections. By embracing social

inclusion and local engagement, hospitality providers can really develop a sense of belonging and shared responsibility.

The rise of social eating underscores this shift, positioning food as both nourishment and a unifying force for mental and emotional well-being. In a disconnected and increasingly digitalized world, food bridges social gaps, building resilience and connection.

CASE ACCOR

Accor has embraced such a community approach to hospitality by prioritizing local community engagement as a core element of its well-being strategy. Recognizing the shift from traditional hotel models to spaces designed for "living, not just sleeping," Accor focuses on creating environments that cater to both guests and residents. By integrating wellness spaces such as open dining spaces, fitness clubs and communal areas, Accor hotels serve as vibrant hubs for social interaction and shared experiences. By promoting local engagement through thoughtfully designed spaces and programs, Accor not only enhances guest satisfaction but also contributes to the well-being of the surrounding community, building more meaningful relationships between hotels and the areas they serve.

CASE HEINEKEN

Heineken's 'Worlds Together' campaign highlights the transformative power of shared dining experiences in fostering meaningful connections across divides. By focusing on food as a universal language, the campaign creates opportunities for people from diverse backgrounds to engage in open conversation and discover common ground. The initiative not only promotes unity but also reinforces the importance of inclusive spaces where individuals can share stories, traditions and perspectives over a meal.

One standout element of the campaign is its collaboration with the Social Gastronomy Movement, leveraging food as a tool for social inclusion and community-building. Heineken hosts events and gatherings that feature diverse culinary offerings, sparking dialogue among participants and demonstrating how food can transcend differences. These experiences align with Heineken's broader purpose of "sparking the joy of true togetherness", using the simple act of sharing a meal to create impactful moments and trust.

Through 'Worlds Together', Heineken positions itself both as a beverage brand and a facilitator of deeper, more meaningful social interactions, showcasing how hospitality-driven experiences can drive unity and understanding in a fragmented world.

INDUSTRY RECOMMENDATIONS

Communal dining experiences: Design spaces and dining experiences that encourage communal eating, such as shared tables and family-style meals, to promote social interaction, trust and a sense of belonging.

Creating cultural and social connections: Feature local chefs, artists, or performers and design experiences that celebrate and preserve cultural heritage, using food as a medium for connection and storytelling.

Develop community partnerships: Partner with local schools, nonprofits and social initiatives to align hospitality operations with broader community well-being goals, ensuring positive social and environmental impact.

Local partnerships: Collaborate with local farmers, producers and community organizations to strengthen ties and support the local economy.

Promote social wellness: Incorporate social dining rituals and shared experiences into hospitality offerings to combat isolation and enhance emotional well-being.

Promoting transparent supply chains: Support local producers and artisans to ensure sustainable and equitable sourcing practices.

Workshops and wellness programs: Partner with communities to run educational initiatives on healthy eating and sustainability.





Part 3.

Future directions

A GLIMPSE INTO THE FUTURE

The future is unwritten, yet it is filled with opportunities waiting to be seized. The hospitality industry faces a dynamic and rapidly changing landscape defined by technological transformation, environmental challenges, rising health awareness and challenges and increasing isolation in society. These pressing challenges also serve as opportunities for the industry to demonstrate leadership and creativity, as the hospitality industry can contribute to solutions for all of them. Future success will depend on the ability of industry leaders to adapt, innovate and engage with complexity in meaningful ways. As the Alan Kays saying goes, "the best way to predict the future is to invent it."^[14]

To thrive in a VUCA world, (volatile, uncertain, complex, ambiguous), hospitality businesses must future-proof their strategies. This means not only understanding the wave of technological advancements coming their way but also understanding the societal and generational shifts reshaping consumer behaviors. Never before has the industry encountered such diversity in demographics, values and expectations. This complexity presents an opportunity to rethink traditional strategies and segment audiences in innovative ways to then better design experiences that meet the multifaceted needs of today's consumers.

COLLABORATION TO EMBRACE COMPLEXITY

The hospitality industry has the potential to use food as a powerful tool for connection, bridging divides across generations and geographies. Inspired by initiatives like the Food Systems Vision Prize, which unites diverse stakeholders to imagine bold futures for food systems, hospitality leaders can communicate their own "North Stars" for the future of hospitality.

“Nobody can do everything, but everybody can do something. And if we work together, we can fix food. If you have a choice, you can change your own health and the planet’s one bite at a time.”

Dr. Gunhild A. Stordalen, Founder and President of EAT Foundation and EAT Lancet Report

Collaboration across a broad spectrum of stakeholders (farmers, scientists, artists, entrepreneurs and consumers) is essential for co-creating solutions to today's pressing challenges. Initiatives like [Agritecture](#), which integrates urban farming into architectural projects, exemplify the transformative potential of interdisciplinary partnerships. By reimagining spaces like hotel rooftops as vertical farms, these collaborations deliver fresh produce, address food insecurity and offer engaging guest experiences. Meanwhile, technologies like augmented reality (AR) menus enhance food transparency, telling the story of a dish's origin, environmental impact and cultural significance. Such innovations turn dining into an immersive and educational journey, resonating with the growing consumer demand for meaningful experiences.

Entrepreneurs and innovators are critical in shaping the future of hospitality by developing ideas that could bring real change. Supporting these innovators is essential for developing the next generation of solutions. Programs like Thought For Food (TFF) and EHL Innovation Hub

(EHL Next SA) showcase how nurturing trailblazing ideas can drive industry transformation and further strengthen ties between the hospitality industry and entrepreneurial ecosystems. From AI tools for reducing food waste to regenerative agriculture and plant-based proteins, these initiatives showcase how hospitality businesses can act as testbeds for innovation. By partnering with accelerators and innovative ecosystems and piloting sustainable solutions, hotels and restaurants can position themselves as leaders in an evolving market.

Co-creation and transparent processes are ways for the hospitality industry to forge ahead in addressing sustainability and well-being issues while delivering future-ready experiences. This collaborative approach ensures that hospitality remains a dynamic and meaningful force for innovative connection in an increasingly complex world.



FUTURE FOOD TRENDS AND INNOVATIONS

Disruptive technologies and innovations like AI, digital platforms and 3D food printing will further reshape the hospitality landscape. AI-powered data analytics provide insights into consumer preferences, enabling hyper-personalized offerings, such as menus tailored to individual DNA, microbiomes or healthcare needs. Innovations like 3D food printing and in-store manufacturing could bring bespoke, nutrient-dense foods closer to consumers, reducing supply chain distances and enhancing sustainability.

"The future of food is personalized—what if your next meal could be printed just for you?"

Alexandre Bastos, Head of Front-End Innovation, Givaudan

Wearable technologies offer possibilities for integrated health experiences, whereas future advancements, such as smart pills and telehealth integration, are expected to further revolutionize how food, health and hospitality intersect. Innovative and holistic wellness solutions are set to become increasingly varied. Hotels could collaborate with tech innovators to offer guests personalized health metrics and dietary recommendations, merging wellness with convenience even further. These technologies, coupled with experimental initiatives like pop-up menus and seasonal ingredient showcases, empower hospitality providers to adapt dynamically while offering fresh, marketable experiences.



NUGGETS OF INSPIRATION INTO WHAT THE FUTURE MAY HOLD



3D Printing in food production

Advances in 3D printing are opening new frontiers in food innovation, allowing for the creation of intricate, customizable shapes and textures as well as on-demand production of specific food items. This technology is particularly valuable in fine dining and for meeting specific dietary requirements in healthcare and hospitality settings.

Example: Companies like [Aleph Farms](#) are combining 3D printing with cultivated meat technologies to create structured cuts of meat that closely mimic the texture and flavor of traditionally produced meat.



Lab-grown meat

Cultivated meat continues to gain traction as a sustainable alternative to traditional animal agriculture. While many companies focus on chicken and beef, innovators are diversifying into other species and forms.

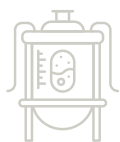
Examples: [Orbillion Bio](#) in the States focuses on premium meats such as Wagyu beef and bison. [Vow Foods](#), Australia, are exploring exotic options like quail and other species, pushing the boundaries of what cultivated proteins can offer. In South Africa, [NewForm Foods](#), are developing cultivated lamb to cater to regional and global markets.



Microalgae

Microalgae are emerging as one of the most sustainable sources of nutrition, requiring minimal natural resources such as sunlight, CO₂ and water. These aquatic plants offer high nutritional density, making them an attractive option for sustainable diets. However, challenges remain in extracting nutrients efficiently and scaling production for broader consumer markets.

Example: Companies are exploring innovative methods to harvest and process microalgae, such as optimizing cultivation systems that maximize nutrient yield while minimizing environmental impact.



Fermentation technologies

Fermentation technologies are revolutionizing the production of sustainable proteins by bypassing traditional agribusiness supply chains. These methods create nutrient-dense, flexible protein solutions that address environmental and resource concerns.

Example: [*SuperBrewed Foods*](#) uses fermentation to produce a "magic protein" packed with essential nutrients. Their process leverages side-stream inputs, such as food waste, to create sustainable protein alternatives, demonstrating the potential for innovative, resource-efficient solutions.



Gene-edited crops

CRISPR and other gene-editing technologies are enabling the development of crops with improved traits, such as enhanced flavor, resilience to climate change and greater nutritional value. These advancements promise to meet growing demands for sustainability and efficiency in agriculture.

Example: A U.S. company, [*Pairwise*](#), has developed a new variety of mustard greens that are milder in flavor and more appealing to mainstream consumers, broadening the crop's marketability.



Ethical & alternative proteins

With foie gras facing bans in parts of the U.S. due to ethical concerns, alternative proteins are stepping in to fill the gap. Startups are developing ethical, cultivated foie gras that maintains the rich flavor profile of the original product without the ethical and environmental drawbacks.

Example: France-based [*Gourmey*](#) is leading the charge in cultivated foie gras, offering a humane alternative to the traditionally controversial delicacy.



The emergence of under-utilized crops

Underutilized crops are gaining attention as sustainable and nutritious alternatives to conventional staples. These crops often require fewer resources to grow and are more adaptable to challenging climates.

Example: [*WhatIF Foods*](#), Singapore, are popularizing Bambara groundnut milk, derived from a drought-resistant legume. The product combines environmental resilience with high nutritional value, making it a promising addition to the market.



Mycelium-based foods and ingredients

Mycelium, the root structure of fungi, is being used to develop sustainable food products from meat alternatives to natural pigments. Its versatility and environmental benefits make it a key player in the future of food.

Examples: [*MyForest Foods*](#) produces bacon from mycelium with a taste and texture similar to pork. *Michroma* creates natural food colorants using fungal fermentation, reducing the need for synthetic or resource-intensive alternatives.



Synthetic biology and precision fermentation for premium and natural ingredients

Synthetic biology is enabling the creation of sustainable alternatives to resource-intensive ingredients such as palm oil, chocolate, coffee and animal-derived fats. These innovations provide scalable solutions for industries seeking to reduce environmental impact. They improve flavor and texture while reducing dependency on resource-intensive production methods.

Examples: Startups are using precision fermentation to produce animal-free chocolate and coffee, offering consistent quality while reducing reliance on land and water. Synthetic palm oil alternatives, like those of *Cl6 Biosciences* are also being developed, addressing deforestation concerns tied to animal production.



Aquatic innovations and seaweed

Seaweed and other aquatic food sources are being harnessed for their sustainability, nutritional value and versatility. These foods require fewer inputs to grow and have a lower environmental impact compared to terrestrial crops.

Example: Seaweed is being incorporated into snacks, pastas and flavoring agents, while other companies focus on integrating seaweed and algae into feed for animals and aquaculture.



Sustainable food packaging

The push for sustainability extends beyond food itself to include packaging innovations. Biodegradable, edible packaging solutions are helping reduce waste, appealing to eco-conscious consumers.

Examples: Startups like [Notpla](#) are creating seaweed-based packaging alternatives for takeout food, offering a sustainable option that replaces single-use plastics.



Diversity of ingredients

The future of food innovation points toward an increased diversity of ingredients, driven by a desire for sustainability, nutrition and unique culinary experiences. Emerging ingredients like Yacon (a naturally sweet, low-calorie tuber from Peru), nutrient-dense seaweed, ancient grains like Teff (a staple in Ethiopian cuisine) and bold flavors like Yolélé (West African fonio) are becoming more prominent. These ingredients celebrate regional traditions and offer solutions to global challenges such as climate change, biodiversity loss and food security, paving the way for a regenerative, flavor-rich future.



GLP-1 Drugs and evolving consumer preferences

The rise of appetite-regulating drugs (e.g., GLP-1) is shifting consumer focus toward higher-quality, nutrient-dense foods in lower quantities. This trend is driving innovation in flavor profiles as consumers seek alternatives to overly sweet or salty flavors. As these drugs reduce caloric intake, food service operators may respond with smaller portions, nutrient-dense dishes and menus emphasizing functional foods. This change aligns with broader consumer trends toward health and wellness, creating opportunities for hospitality businesses to focus on plant-based, fortified, gut-friendly options. [J.P. Morgan predicts](#) that obesity medication will soon be a \$100 billion market and sees about 9% of the US population being on a weight-loss drug by 2030.

Examples: [Nestlé](#) has launched a new product range, Vital Pursuit, which is a range of frozen food products for consumers on GLP-1 weight loss medication.



Flavor modulation and next-generation tastes

As consumer palates evolve, there is a growing demand for flavors that go beyond the traditional sweet and salty. Innovations in flavor science are exploring savory, bitter and umami profiles, catering to curious, health-conscious consumers.

Examples: Companies like [microTerra](#) are working on flavor modulation technologies that enhance or balance these profiles, creating products that resonate with shifting tastes, particularly in a post-GLP-1 landscape where sweetness and saltiness is less appealing and where consumers are more aware of sugar and salt content in foods.



THE FUTURE OF FOOD

The future of food is a dynamic and multifaceted landscape where micro-trends and countertrends coexist, reflecting the diversity of today's consumers. From lab-grown meat and regenerative farming to ultra-natural ingredients and weight-loss drugs, the possibilities are as varied as they are transformative. Robots and automation may redefine dining experiences, while social eating and community connections remain vital for encouraging human interaction. This pluralistic food future is best summarized by Mike Lee's insight:

"The future of food? It's all on the table — lab-grown, plant-based and everything in between."

Mike Lee, Food Futurist and Scenario Planner

For hospitality, the path forward involves embracing these trends while continuously innovating to cater to the diverse 'food tribes' that represent today's global demographic shifts. Any transition will require testing and adaptation to find the right balance.

INNOVATION AND EXPERIMENTATION IN HOSPITALITY

Hospitality businesses must adopt new technologies and cultivate a mindset of experimentation. Technologies like AI-powered data analytics, wearables and digital platforms are improving rapidly, providing insights into consumer behaviors and preferences. These tools enable businesses to anticipate shifting demands and offer hyper-personalized solutions, while still keeping the all-important personal touch. Advances in genetics and microbiome research give the industry opportunities to create tailored health solutions that align with consumer desires.

Hyper-personalized menus, informed by digital diagnostic tools and guest health metrics, could set new standards by offering bespoke dining experiences that cater to specific nutritional profiles and emotional needs. However, true progress requires more than just technology. It demands bold experimentation and a willingness to iterate.

Drawing inspiration from the fashion industry's capsule collections—curated, limited-edition offerings designed to test consumer interest—hospitality businesses can apply similar principles. Seasonal menus, pop-up dining experiences or hyper-local ingredient fairs with emerging chefs or regional farmers can act as testbeds for innovation. This experimental mindset allows the integration of innovative ingredients like seaweed, algae or even insects, which, though unfamiliar to many, represent the future of sustainable nutrition.



By blending technology with experimentation, hospitality providers can refine their offerings, gather real-time feedback and build stronger connections with their audiences. These initiatives not only enhance guest experiences but also position businesses as forward-thinking leaders in the evolving food and well-being space.

"By blending technology with experimentation, hospitality providers can refine their offerings, gather real-time feedback and build stronger connections with their audiences."

Christine Gould, Thought For Food and GIGA

As the hospitality industry evolves, the opportunities for transformation are boundless. By leveraging technology and fostering collaboration, hospitality leaders can redefine the future, not just of their businesses but of the broader food and well-being landscape. The time to shape this future is now.

HOW YOU CAN BECOME A CATALYST

In the immediate future, the authors of this report believe that the hospitality sector should focus on integrating nutrition and food well-being into their service offerings in an authentic way that fits the outlet's values and focus. Adopting and promoting nutrient balanced and plant-based ingredients, for example, will address both health-conscious consumption and environmental sustainability, but this may not be the way forward for all. Establishing transparency of nutritional information and food sourcing will also be critical to cater to the growing consumer demand for wholesome and nutrient-rich alternatives.

"Imagine, envision, believe, engage, act: A recipe for change in food and well-being."

Michiel Bakker, CEO CIA

Over the medium term, the focus should shift toward personalizing guest experiences in nutrition and well-being. Advances in personalized nutrition can be utilized to tailor dietary offerings to individual health needs and preferences. Furthermore, the integration of global dietary insights, such as those from the Japanese or Mediterranean diets, linked to longevity and reduced disease risk, can offer a competitive edge. Ongoing education and training in nutrition and holistic food systems approaches will be essential for staff to adequately meet these personalized and culturally informed service expectations.

In the longer term, the hospitality industry has an opportunity to prepare for and adapt to demographic changes such as an aging global population. Developing specialized food programs that cater to older adults, considering their specific dietary needs, will be crucial.

Additionally, investing in research and partnerships will be important to stay ahead in innovation. The sector also has a great opportunity to be a catalyst for a much-needed food systems change, leading in sustainability practices, ensuring that food sources are healthy, sustainable and minimizing the environmental footprint of dietary choices.

Here's a comprehensive, organized list of recommendations from the expert interviews on what food service providers and hospitality players could be inspired to do to get started. It is not a one-step-by-step manual, but rather a list of possible actions to fit with the organization's nature, purpose and maturity.



IMPLEMENTATION STRATEGIES

Start small: Focus on incremental changes in operations, such as sourcing and waste management.

Framework for action: Imagining the future, envisioning goals, believing in one's ability to effect change, engaging stakeholders and taking actionable steps.

Measure impact: Use tools like health impact assessments and nutritional software to track and refine efforts.

Training and education: Train staff to share stories about food origins and sustainability, empowering them to act as ambassadors. Get your chefs in front of the customer!

Guest and team engagement: Co-create initiatives with the team and customers by listening to their vision, feedback and aligning offerings to their needs.

Collaborate across disciplines: Partner with tech innovators, nutritionists, educational institutions and sustainability organizations to create holistic wellness solutions.

Embed well-being into strategy: Treat wellness as a core element of the hospitality experience, integrating it into marketing frameworks, operational practices and property design to make it a transversal priority.

PRACTICAL TIPS

Healthy mini-bars: Replace unhealthy mini-bar items with nutritious alternatives.

Buffet strategies: Place healthier options at the front and use smaller plates to reduce waste.

Storytelling: Highlight ingredient origins and local farmers' contributions.

Integrate wellness efforts: Strategically place wellness initiatives to ensure visibility and importance.

Focus on fundamentals: Emphasize core wellness pillars like sleep, nutrition and movement over fleeting trends.

Action-first approach: Focus on implementing sustainable practices internally; let impactful actions speak louder than external communication.

Innovation testbeds: Use hospitality spaces to pilot food innovations, gather real-time guest feedback and refine products before scaling.

Conclusion

This report demonstrates the deep connection between food and well-being. By examining emerging consumer behaviors and innovative practices, the report highlights food's critical role in promoting health, sustainability and community engagement. Food is not merely sustenance but a cornerstone of holistic well-being, influencing physical and mental health, as well as cultural identity. As hospitality evolves, it holds a significant opportunity to integrate well-being into strategies and operations, shaping a sustainable and equitable future while staying ahead of the wave.

This is a call to action. Chefs, operators, educators and policymakers have the opportunity to drive change by adopting transparent practices, prioritizing sustainability and rethinking how food can connect people. By focusing on human and planetary well-being, the hospitality industry can go beyond meeting consumer demands to play an active role in shaping a better future. This approach positions the industry as a driver of societal transformation, creating spaces where individuals and communities can thrive and contributing to a healthier, more resilient world.



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