

Organic catering – a perspective for the sustainable development of the Turkish catering sector

Nazan Arifoglu

Canakkale Onsekiz Mart University, Canakkale College of Applied Sciences, Department of Food Technology, Canakkale, Turkey

Mustafa Ogutcu

Canakkale Onsekiz Mart University, Faculty of Engineering, Department of Food Engineering, Canakkale, Turkey

Hasan Basri Ormanci

Canakkale Onsekiz Mart University, Canakkale College of Applied Sciences, Department of Fisheries Technology, Canakkale, Turkey

Ali Karabayir

Canakkale Onsekiz Mart University, Faculty of Agriculture, Department of Animal Sciences, Canakkale, Turkey

Abstract: Nowadays, the organic catering sector emerges as a significant sector within the European Union countries, since it is considered to be driven up by the increasing consumers’ consciousness towards environmental aspects and healthier food consumption. Especially public food procurement has the main role to support the development of sustainable food catering services, by promoting the development of sustainable agricultural production and encouraging the education of the citizens about sustainable and environmentally friendly production. In fact, the organic approach concerning catering is mainly a key part of public procurement policies towards school meal programmes. Thus, in a number of EU countries, public catering is regarded as the driving force for the further development of the organic catering sector. In the present study, the main aspects of the organic catering sector within some European countries will be discussed and aspects for the sustainable development of the Turkish catering sector will be provided. This report was prepared within the Erasmus + Project “Empowering Public Food Procurement” (Project № 2017-1-FR01-KA202-037271).

Keywords: Organic food, catering, sustainability, rural development.

Introduction

The concept of the catering services, has gained significance and nowadays, is designated as a branch of the food sector, due to high demand for ready-to-eat food especially at work places, schools, various meeting organisations, etc. In a broader sense, catering can be defined as a form of food services to fulfil the consumers’ nutritional requirements by organising both food preparation, ordering and delivery of the food. Thus, the catering sector progressed firstly in the developed countries and continue to expand these services throughout the world. In different countries, the notion for the concept of catering is different depending on the country’s specific features such as degree of urbanization, type of life-style, even the traditional cuisine itself. In Great Britain, the catering services are so well developed, that nowadays several catering types are well distinguished. These are traditional catering, contract catering (catering services are provided by signing a contract between provider and recipient), franchise catering (when a franchise system is present within the catering services), popular catering (services intended for wide audience), systemic catering (services developed to a specific market) and function catering (business organisations, conferences, meetings,

weddings) (Rutkowska and Czarniecka-Skubina, 2015). In Canada, the catering services are mainly provided to hospitals, schools, prisons, factories, remote facilities and offices and in 2014, the public catering services share reached 4.5 billion USD, with the companies Compass, Aramark and Sodexo being the leading ones (Arbulu, 2015). In France, the catering services were provided by either the institutions' own kitchens or by specialized catering companies. At the end of 90's, the share of the specialized catering companies was 30%, while 70% of the institutions offering food to their employees, pupils, etc. preferred to prepare food in their own kitchens. In France, approximately 67% of the catering services are provided by 4 large catering companies (Sodexo, Avenance, Compass and Sogeres), that sell their services to industrial factories, public institutions, schools and hospitals (Gauthier, 2009). In Germany, the catering services are estimated to comprise 30% of the food services sector, with largest catering companies being Compass, Aramark, Sodexo, Dussmann and Klüh. It is also expected that the catering services will increase their share due to the increase in the number of single households and aging population (Rehder, 2013). In most countries' reports, it is envisaged that the catering services will develop and increase their share in the market, since societies tend to pretend for safe, easily affordable, cheap and quality food, without spending effort for the preparation of the food. The development of the catering industry is mainly because of the customers' trust of the security of the foods in terms of hygiene and nutritional quality, and the increasing positive notion that catering companies will provide both cheaper and nutritionally quality products (Rutkowska and Czarniecka-Skubina, 2015). Thus, the interest in catering services is expected to increase throughout the world.

Background and current status of the turkish catering sector

At present it is accepted that the foundation of the modern catering in Turkey started in 1959 with the food services provided by Tuna Emre Yemek restaurant to some schools and in 1963 to some industrial factories situated in Istanbul (Kaya and Ilhan, 2018). On the other hand, the roots of the catering sector in Turkey, though not in the current form, lie in the special food services during the Ottoman Empire such as preparing food for poor people by vakifs (charity foundations) and meals for the soldiers in the army (Anonymous, 2018, Kaya and Ilhan, 2018).

Since 1970's the catering sector grew rapidly and nowadays various types of companies from big international companies such as Sodexo, Clüh and Compass to small scale catering firms are active in the market. Currently, the biggest Turkish catering companies in Turkey are Sofra, Sardunya, Obasan and BTA. The catering services are mostly well developed first in Istanbul and afterwards in other industrial and urban areas and in big cities such as Ankara, Izmir, Adana, Bursa, Eskisehir and Izmit. While the registered catering facilities were 300 in 1970s' (Atalaysun, 2015), this number increased to 4800 in 2017 (Kaya and Ilhan, 2018). The highest incremental growth of the sector was achieved especially in the last 15 years. The main reasons for this dramatic development were mainly the high industrialization rates that led to the increased demand of ready-to eat meals for a short period of time both for students, pupils and employees in the public and private sector.

Another significant reason for the high development of the Turkish catering services during the last 15 years is the change in the legislation of public food procurement. The food services in the public sector including health services, education and also public institutions are currently done on a contract basis with private catering companies. Therefore, catering services gained significance not only to provide meals to the industrial facilities such as factories, offices and other institutions, but also to public institutions.

The increase in the catering sector led to changes in the legislation of the companies. For a company to be founded, it has to undergo some inspections to check its reliability and effectivity in achieving the legal standards of producing safe food. Therefore, the Ministry of Agriculture and Forestry (former Ministry of Food, Agriculture and Livestock) is responsible for the registration and inspection of the catering companies in Turkey. Besides this, the catering companies are forced by the increasing consumer consciousness and demand for quality food to obtain HACCP certificates and adopt ISO 22000:2005 system. On the other hand, with the increase in the number of catering

services, the necessity to unite under an umbrella association led to the foundation of the Turkish Federation of Catering Associations (in Turkish: YESIDEF) in 2005. To increase the market share of the sector, YESIDEF has been dedicated to implement some projects concerning education and military services. An example for this is the project “Feeding the New Generation”, with which it is intended to provide meals for 17 million students, 555 000 teachers in 69 000 schools. At present, 110 000 soldiers are provided meals by the catering services in Turkey, while YESIDEF aims to provide meals to 650 000 soldiers. Considering the increase in health problems related to obesity, cardiovascular diseases and obesity, the former Ministry of Food, Agriculture and Livestock of Turkey (now Ministry of Agriculture and Forestry) adopted Directive for School Canteens concerning the special issues such as special hygiene issues, equipment issues, hygiene issues related with personnel toilets, dressing rooms and social areas, ventilation, illumination, water quality, waste water systems, storage of cleaning and disinfectant materials, personnel hygiene, education, procurement of raw materials and food, storage, preparation of the food products, cooking, food freezing, thawing, transportation, temperature control and cold chain maintenance, food serving, marketing and consumption, pest control, cleaning and disinfection, waste management, materials in contact with food products, traceability, recalling and emergency issues.

Furthermore, in March 2016, the Ministry of Education published a Circular for inspection of school canteens and catering, with which the sales of chocolate, candy bars, muffins and other sweetened and/or processed food and beverages were banned, and also listed the food products permitted to be sold in the canteens such as fresh fruit juices, fresh and dried fruits, vegetables, nuts, salads, milk, cheese and eggs.

The market value of the Turkish catering sector was 2.25 billion USD in 2004 (Atalaysun, 2015), while this value increased to 22 billion USD in 2016 (Anonymous, 2017a). Currently, around 400 000 people are employed in the sector. It is stated also that daily the catering services in Turkey provide meals to around 7 million people (Atalaysun, 2015). It is expected that by the year of 2023 (100th Anniversary of the Republic of Turkey), the catering sector will daily provide meals to 28-30 million people (Yuksekbaz, 2014).

As can be seen from the values stated above, the catering services in Turkey substantially developed and the expected trend is that this development will continue. Nevertheless, the Turkish catering sector is facing with some problems. Some of these problems are insufficient modern facilities, unregistered production facilities, unfair competition, insufficient skilled employees, insufficient trained staff, need for improvement of the vocational training, insufficient inspection, insufficient occupational health and safety, lack of established policy of waste management (Kaya and Ilhan, 2018). The afore-mentioned problematic issues should be taken into account when the sustainable development of the catering sector in Turkey is considered and at present among the main aims of the catering sector is to increase the quality standards.

Besides, it can be noted that, the organic catering sector in Turkey, though in its infancy, started with the increased consumer consciousness towards healthier and more nutritious and safe food meals. Thus, in 2010, the first catering company offering organic meals in Istanbul was Emin Catering. Currently, there are several companies providing organic meals. Some of them are Chez Bruno VIP Catering (www.chezbruno.org, 20-25% organic), Tezgah Food (www.tezgahfood.com, 30% organic), Vip Catering (www.vipcatering.com.tr) and Konukseverler Catering. These companies serve organic meals upon consumer demand at special events such as business organisations, weddings, parties, etc.

Actually, the organic food sector in Turkey has also undergone some shifts. Although the organic agriculture production is still mostly intended for export, there is growing trend in consuming healthier and safer food products. The perception of many Turkish consumers towards organic products is that these products are somewhat luxury. That is why, nowadays organic foods are mostly preferred by consumers who are higher educated, live in big cities and have higher income levels. Nevertheless, the rising awareness towards greener products and healthy foods has driven up the sales of health products by 24% from 2013 to 2014 (Anonymous, 2017b).

Organic catering in the European Union countries

Organic food production was proven to be more sustainable when compared to conventional production in regards to environmental issues such as soil quality maintenance, water conservation, energy utilization, pest control, etc. Nevertheless, organic products are regarded as more safe, in terms of containing no chemicals such as fertilisers, pesticides and insecticides and are claimed to be more nutritious. Thus, organic food consumption has increased worldwide, due to raising awareness of consumers towards “greener products”. Furthermore, organic farming was suggested as a solution to food insecurity and climate change mitigation (Anonymous, 2013). Based on the rising significance of organic agriculture, in order to increase the share of organic agriculture, the European Commission set up the Common Agricultural Policy (CAP), where organic farming is regarded as special type of production that the European Union is encouraging to broaden its availability (EC, 2014). Besides, the European Commission established the European Union Green Public Procurement (EU GPP) as a voluntary initiative and defined GPP as “... a process whereby public authorities seek to procure goods, services and works with a reduced environmental impact throughout their life cycle when compared to goods, services and works with the same primary function that would otherwise be procured”. In the EU GPP, the environmental criteria for public purchasing of products to be used by public procurers to define specific requirements in their calls for tenders are identified. Since then, European countries such as Austria, Denmark, France, Italy, the Netherlands, Spain, Sweden, United Kingdom and others adopted their own Green Procurement Criteria (Neto and Caldas, 2017).

In order to increase the share of organic food consumption, the public catering services are foreseen as the best choice, since public catering comprises a significant part of the food consumption, given that normally daily any citizen consumes at least one meal outside its home. The main targets of public catering are health care facilities such as hospitals, elder care and schools at all levels. In line with the EU legislation and vision towards organic agriculture, some European countries took their own country’s action plans. For example, the government of Denmark adopted the Danish Organic Action Plan 2020 in 2011, aiming to double the Danish organic agricultural area by 2020. In order to achieve this aim, the main strategy is to focus on the increase in the demand for organic products, and by doing so to motivate the farmers to move to organic farming. Therefore, the action plan aims to increase organic food procurement up to 60% within the catering services intended for public institutions in Denmark till 2020 (Sorensen et al., 2015). Furthermore, in Denmark around 30% of the institutions and 50% of the municipalities are involved in the conversion to organic catering (Mikkelsen et al., 2006). Another good example is the Finnish food policy, which was launched in 2010 envisioning that organic food production to comprise at least 50% of the Finnish food sector. In Finland, similarly to Sweden, all students in primary, secondary and vocational schools and children in kindergartens are served a free warm meal. Thus, the share of public procurement within the catering services in Finland is quite high. Therefore, by implementing special rules for incorporating more organic raw materials in the public catering services, the demand for organic products will increase. Since the food services are funded by the municipalities and the government, the raw materials purchases might be constrained by law and careful design of tenders might be prepared, in order to give chance for organic and local food suppliers to be chosen. Based on this, it can be stated that increasing the share of organic products in public catering is primarily a political decision. To achieve this in competitive nature of tendering, it is suggested that long-term contracts should be planned in order to secure income and give chance to the entrepreneurs to concentrate on developing their business (Risku-Norja and Loes, 2017). There is a general belief, that increasing the share of organic products in publicly funded menus, will inevitably increase the cost of these meals. A recent study implemented in Finland revealed that with a careful menu planning by gradually shifting to lacto-vegetarian dishes, the costs of organic menus might be maintained at the same with those of conventional menus (Nuutila et al., 2018). On the other hand, Tikannen (2014) described the successful shift towards consumption of local and organic food in the catering services of a rural town in Finland. Kristensen et al. (2009) presented the good practices and efforts of three Danish

municipalities, Copenhagen, Roskilde and Gladsaxe, to achieve the transformation of catering services into organic.

Besides, promoting organic products for the catering services, in 2009, the Danish Veterinary and Food Administration launched Organic Cuisine Label. The catering companies may apply for this label in order to promote their commitment to organic procurement, if they can document their level of inclusion of organic products into their meals. Three different labels are assigned: “bronze” – 30-60% organic products use, “silver” – 60-90% organic products use, “gold” – 90-100% organic products use.

Besides, it should be mentioned that the increase of the share of organic products in the catering services throughout Europe is a slow process, throughout which the catering companies are facing with serious problems as inadequate food selection, unstable deliveries, insufficient organic suppliers, price premiums, etc. (Risku-Norja and Loes, 2017; Sorensen et al., 2015).

Trends for the development of the organic catering sector in Turkey

In view of the above-mentioned good practices in the European countries, in order to increase and promote organic food consumption in Turkey, the public food procurement policies might take some presumptive actions. As EU Candidate State, the government might envisage some changes in the current legislation of public food procurement. At present, the catering companies providing meals to public institutions such as hospitals, schools and military forces are registered and inspected by the Ministry of Agriculture and Forestry and its branches situated in the cities and towns throughout the country. In many European countries, the decision for the public procurement is done by the municipality authorities and thus many cities and towns will have the opportunity to favour and increase their share of organic products in public procurement, by using local organic supplier chains. On the other hand, a careful menu planning might be done in order to achieve healthier meals at even equal costs with less meat and enriched quantity of organic vegetables and pulses. This will be in line with the YESIDEF’s project for feeding the children better. Though the process of conversion the catering services from conventional to organic food products is a slow and difficult one, the practices applied in the EU countries have proven that organic catering services are not impossible. How this will be achieved in the really competitive nature of the sector is really a problematic question. The main obstacle is price/cost relationship that makes it almost impossible to compete, but with proper menu planning, it was shown that this can be achieved. At present, usually the institutional catering contracts in Turkey are done on 1- or 2-year basis, but by changing the legislation to long-term contracting, the entrepreneurs in public catering procurement might be promoted.

The consumer consciousness might be raised through promoting the fact the feeding children with organic food might lead to improved health. Thus, starting from kindergartens, then primary and secondary schools, when the parents are conscious of the significance of quality nutrition, the consumer demand may also foster the inclusion of organic products in school meals.

Acknowledgements

This report was prepared in partial fulfilment of the tasks within the European Project Erasmus+ Project “Empowering Public Food Procurement” (Project № : 2017-1-FR01-KA202-037271) funded by the French National Agency.

References

1. Anonymous (2013). United Nations Conference on Trade and Development (2013) Trade and Environment Review 2013: Wake Up Before It Is Too Late. Geneva: UNCTAD.
2. Anonymous (2017a). Turkey’s catering industry records. <https://www.yenisafak.com/en/economy/turkeys-catering-industry-records-22b-turnover-2738958>. (Accessed on September 2018)

3. Anonymous (2017b). Going green: Turkey's organic food sector in focus. <http://www.worldfood-istanbul.com/media/news/Going-green-Turkey%E2%80%99s-organic-food-sector-in-focus> (Accessed on September 2018).
4. Anonymous (2018). Toplu yemek endüstrisinin tarihçesi. <http://www.gidacilar.net/toplu-yemek-sektorucatering/toplu-yemek-endustrisinin-tarihcesi-1649.html> (Accessed on September 2018).
5. Arbulu, M. (2015). Canada Food Service – Hotel Restaurant Institutional. An updated overview of the HRI Sector in Canada. GAIN Report. No. CA14118. USDA Foreign Agricultural Service. Food Service – Hotel Restaurant. <http://gain.fas.usda.gov> (Accessed on September 2018).
6. Atalaysun, M. (2015). HRI food service sector report for Turkey. http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20Service%20%20Hotel%20Restaurant%20Institutional_Ankara_Turkey_12-29-2015.pdf. (Accessed on September 2018).
7. EC (2014). Action Plan for the future of Organic Production in the European Union. Communication from the Commission to the European Parliament, the Council the European
8. Economic and Social Committee and the Committee of the Regions 2014/179. European Commission, Brussels. https://ec.europa.eu/agriculture/organic/sites/orgfarming/files/docs/body/act_en.pdf. (Accessed on September 2018).
9. Gauthier, R. (2009). France HRI food service sector. GAIN Report No. FR9013, USDA Foreign Agricultural Service, <http://gain.fas.usda.gov> (Accessed on September 2018).
10. Kaya, S. & Ilhan, S. (2018). Problems and solution proposals related in the catering sector. *Güncel Turizm Araştırmaları Dergisi*, 2(1), 553-581. (in Turkish)
11. Kristensen, N. H., Netterstrøm, S., He, C., Mikkelsen, B. E., & Nielsen, T. (2009). Making the organic food service chain work and survive. *Agronomy Research*, 7(Special issue II), 618-624.
12. Mikkelsen, B. E., Bruselius-Jensen, M., Andersen, J. S., & Lassen, A. (2006). Are green caterers more likely to serve healthy meals than non-green caterers? Results from a quantitative study in Danish worksite catering. *Public Health Nutrition*, 9(7), 846-850.
13. Neto, B., & Caldas, M. G. (2017). The use of green criteria in the public procurement of food products and catering services: a review of EU schemes. *Environment, Development and Sustainability*, 1-29.
14. Nuutila, J., Risku-Norja, H., & Arolaakso, A. (2018). Public kitchen menu substitutions increase organic share and school meal sustainability at equal cost. *Organic Agriculture*, 1-10.
15. Rehder, L.E. (2013). Germany strong food service growth. Food Service – Hotel Restaurant Institutional 2013. GAIN Report No. GM13002. USDA Foreign Agricultural Service. <http://gain.fas.usda.gov> (Accessed on September 2018).
16. Risku-Norja, H., & Løes, A. K. (2017). Organic food in food policy and in public catering: lessons learned from Finland. *Organic Agriculture*, 7(2), 111-124.
17. Rutkowska, E., & Czarniecka-Skubina, E. (2015). Catering services in Poland and in selected countries, *Scientific Journal. Service Management*, (15), 13-22.
18. Sørensen, N. N., Lassen, A. D., Løje, H., & Tetens, I. (2015). The Danish Organic Action Plan 2020: assessment method and baseline status of organic procurement in public kitchens. *Public Health Nutrition*, 18(13), 2350-2357.
19. Tikkanen, I. (2014). Procurement and consumption of local and organic food in the catering of a rural town. *British Food Journal*, 116(3), 419-430.
20. Yuksekbaz, S. (2014). Hazır Yemek Sektöründe Satılma. <http://www.satinalmadergisi.com/2014/07/09/hazir-yemek-sektorunde-satinalma> (Accessed: Sept. 2018).