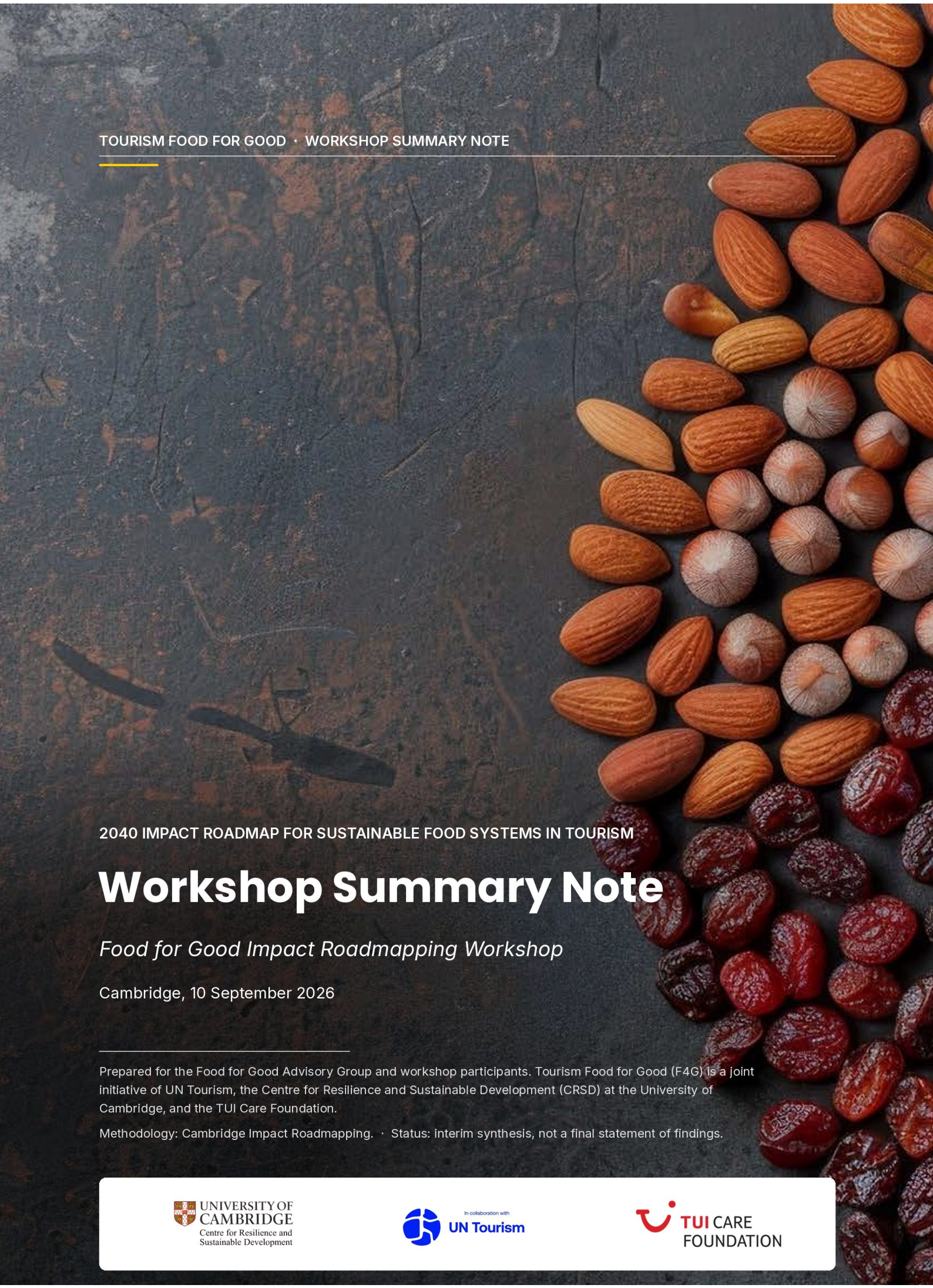


2040 IMPACT ROADMAP FOR SUSTAINABLE FOOD SYSTEMS IN TOURISM

Workshop Summary Note

Food for Good Impact Roadmapping Workshop

Cambridge, 10 September 2026

Prepared for the Food for Good Advisory Group and workshop participants. Tourism Food for Good (F4G) is a joint initiative of UN Tourism, the Centre for Resilience and Sustainable Development (CRSD) at the University of Cambridge, and the TUI Care Foundation.

Methodology: Cambridge Impact Roadmapping. · Status: interim synthesis, not a final statement of findings.

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Centre for Resilience and Sustainable Development

In collaboration with UN Tourism

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About this Note

This Workshop Summary Note records the proceedings and principal lines of discussion of the **Food for Good Impact Roadmapping Workshop**, held at the Institute for Manufacturing, University of Cambridge, on 10 September 2026, with participants joining in the room and online. It has been prepared for members of the Tourism Food for Good (F4G) Advisory Group, in particular those who were unable to attend, and for workshop participants, ahead of the second Advisory Group consultation, which will be held online on **20 October 2026**.

The Note is an **interim synthesis**. It reports what participants said and how the research team has begun to organise that material. It does not present findings as final, it does not weight the relative importance of individual contributions, and it does not commit any partner organisation to a position. The material summarised here is now being combined with the evidence already summarised in the Challenge Note (the literature review, the F4G National Tourism Administration (NTA) Survey 2026 and the stakeholder mapping) and with the F4G Private Sector Survey, which is under review ahead of publication. The combined analysis will serve as the basis for the **Draft 2040 Impact Roadmap**, which the partners intend to release by the end of 2026.

All contributions were made under the **Chatham House Rule**. In the body of this Note, participants are identified only by stakeholder type. Named programmes and destination examples appear only where participants described them as cases already in the public domain. Annex A lists the organisations registered for the workshop.

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Disclaimer

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Artificial intelligence and manual analysis. Generative artificial intelligence tools were used for formatting and editorial refinement of this Note. The collation of the workshop material into this summary, its organisation against the Cambridge Impact Roadmapping categories and all interpretation were carried out by researchers at the University of Cambridge with expert support from UN Tourism.

Summary

The workshop asked one question: **how can stakeholders across the tourism food system align their capabilities and mobilise resources to create measurable economic, social and environmental value by 2040?** More than 30 participants from tourism businesses, national tourism administrations, industry associations, foundations, multilateral organisations and academia worked through the four Cambridge Impact Roadmapping sessions in four facilitated groups, two in Cambridge and two online, before a collective discussion. The main observations to date are set out below; Sections 2 to 6 explain how they were reached and what happens next.

Key observations from the workshop

- **The Challenge Note's starting assumptions were broadly confirmed and sharpened.** Participants recognised the definitional and measurement gaps, the fragmentation of governance across scales and the distance between policy commitment and institutional capacity. They placed the emphasis upstream, on how food is produced, sourced, processed, transported, purchased and valued, with waste reduction at the point of consumption as one part of a wider prevention agenda, and they stressed the interdependence of every part of the chain. They added three further emphases: data fragmentation was treated as a system-level failure rather than a technical gap; procurement intermediaries (importers, wholesalers, distributors) were identified as a powerful and largely unmapped layer; and the sphere of influence of tourism within wider food systems was repeatedly questioned, including its absence from national food-systems pathways.
- **Four pathway pitches emerged.** (1) A destination-level measurement and demand-signal programme built on a small common set of consumption and waste metrics, piloted in around ten destinations. (2) Collectivisation of producers through cooperatives or farmer producer organisations, with guaranteed minimum prices, seed capital and shared risk. (3) Harmonised, risk-based regulation that treats usable international catering food as surplus rather than waste, supported by a shared platform. (4) A network of destinations sharing practice, in which destinations build pride in and respect for their local culinary identity and visitors learn to recognise, value and seek out authentic local cuisine; the online group that proposed it spoke of "intelligent destinations".
- **The assets named most often were intangible.** Brand and consumer influence, convening power, budgets ring-fenced for social or sustainability purposes as distinct from operating budgets (the "social" budget, in participants' words), existing measurement tools, demand forecasts held by tour operators, local chefs, family recipes and culinary heritage, and the willingness of farmers to engage. Physical assets included empty cargo capacity on return flights and ships, food surplus and seasonal gluts.
- **The constraints named most often were structural.** Regulatory divergence across jurisdictions, absent storage, transport and end-of-chain infrastructure, limits on water and land in small islands, weak or undemonstrated business cases, certification requirements that exclude smaller producers, competition law that blocks pre-competitive demand signals, political headwinds against sustainability language, and the absence of any actor playing an orchestrating role.
- **Participants flagged who was missing.** Small and medium-sized enterprises, farmers and fishers, wholesalers and waste contract holders, youth and innovators, front-line staff, consumers, health and climate expertise and, as one facilitator put it, nature itself. Bringing these voices into the validation phase is a priority.
- **Nothing here is final.** The material in this summary is being coded and triangulated with the Challenge Note evidence and the Private Sector Survey. The Advisory Group is invited to test, correct and extend this synthesis before 20 October (Section 6).

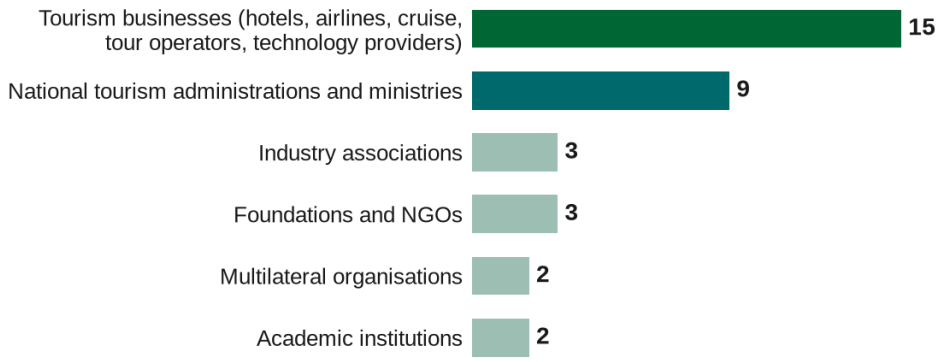
The workshop at a glance

The day followed the agenda circulated with the Challenge Note. It opened with four lightning talks, one given in the room and three online: Professor Steve Evans, University of Cambridge, on bio-economy opportunities for circular food systems (in person); and, joining online, His Excellency Paul A. Gomez, High Commissioner of the Commonwealth of The Bahamas to the Court of St James's; Professor Rob Phaal, University of Cambridge, on the Cambridge Impact Roadmapping methodology; and Zoritsa Urosevic, Associate Fellow, CRSD, and former Executive Director, UN Tourism. After an introduction to CRSD and the project, participants (drawn from the organisations listed in Annex A) moved through four co-creation sessions, each of which

started from the outputs of the one before (Figure 2): defining impact and identifying assets; mapping value exchanges across the stakeholder network; roadmapping to 2040 across the WHY, HOW, WHAT and WHEN of change; and building a Need, Approach, Benefits and Competition (NABC) pitch. A plenary discussion then brought the four group pitches together, followed by reflections and commitments. Two groups worked in the room at the Institute for Manufacturing and two online through a single master link, with facilitators from CRSD, UN Tourism and the TUI Care Foundation in each group.

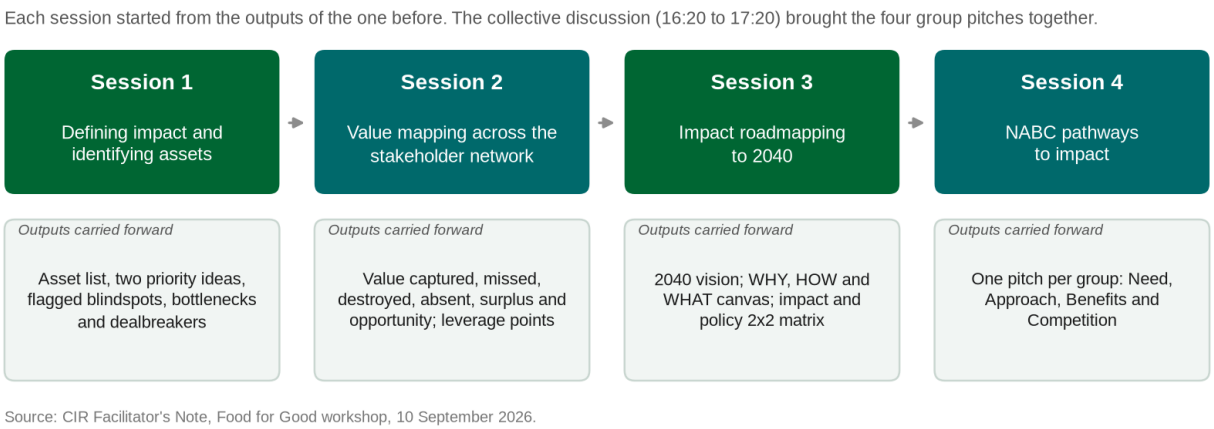
Participants represented the main sources of demand in the tourism food system (hotel groups, airlines, cruise lines and tour operators), the technology and redistribution providers that serve them, national tourism administrations from Africa, Asia, Europe, the Middle East and Small Island Developing States, industry associations for aviation, cruise and hospitality, foundations, multilateral organisations and academic institutions (Figure 1). Participants were senior: chief sustainability officers, heads of sustainability and corporate responsibility, directors-general and directors of national administrations, and programme leads.

Figure 1. Registered participants by stakeholder type. Counts are drawn from the group assignment register; they exclude the facilitation team and the lightning talk speakers.



The method matters for how this Note should be read. Cambridge Impact Roadmapping treats the tourism food system as a complex adaptive system and uses four practical lenses: **blindspots** (what is unseen or unmeasured), **bottlenecks** (where flows of resources, information or action are constrained), **dealbreakers** (conditions that would stop an otherwise promising intervention) and **untapped assets** (resources already present but underused). Facilitators were instructed to capture contributions in participants' own words, to keep disagreements visible rather than force consensus, and to invite every voice once before anyone spoke twice. What follows is therefore a record of a structured deliberation, not a vote. Figure 2 shows how the outputs of each session were carried into the next.

Figure 2. How the four co-creation sessions connected. Each session carried its outputs into the next, so that the final pitches trace back through a pathway, a value gap and an impact definition.



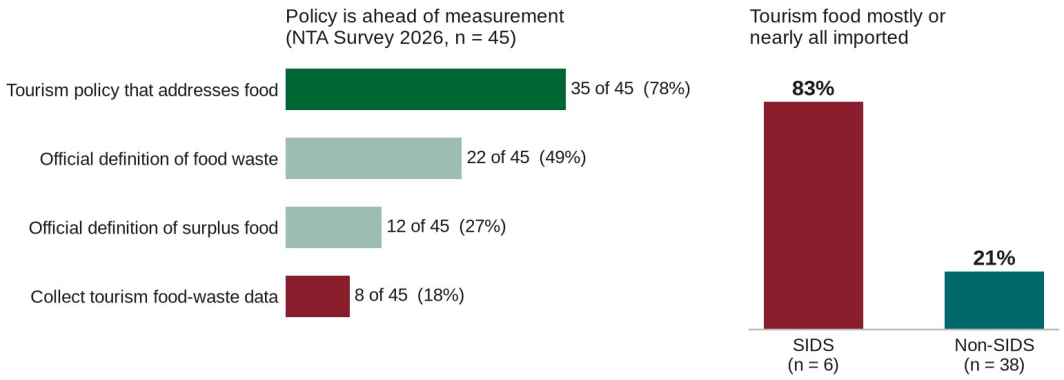
Source: CIR Facilitator's Note, Food for Good workshop, 10 September 2026.

The starting point: what the Challenge Note put on the table

The Challenge Note gave participants a shared, evidence-grounded starting point to test. It drew on a review of more than 125 academic and institutional sources, the F4G NTA Survey 2026 (45 national tourism administrations across all UN Tourism regions and all World Bank income groups, including six Small Island Developing States) and a multi-scale stakeholder mapping exercise. Its central findings are recalled briefly here because the workshop discussion was organised around them.

- **Known challenges.** Policy commitment runs well ahead of measurement: 35 of 45 NTAs report a tourism policy that addresses food, but only 8 collect tourism food-waste data, fewer than half hold an official definition of food waste and only 27 per cent one for surplus food (Figure 3). Governance is fragmented across scales, with international biosecurity rules constraining what destinations can do with surplus. SIDS respondents record markedly lower institutional readiness (a mean of 1.33 against 3.26 out of 6) while reporting far higher import dependence. Ownership and franchise structures diffuse accountability, and NTAs most often cite lack of awareness, funding, technical capacity and inter-institutional coordination as barriers.
- **Known responses.** The UN Tourism Global Roadmap for Food Waste Reduction provides a hierarchy of action and 2030 reference targets; large operators are already measuring, tracking and diverting waste; and sector initiatives are building common baselines.
- **Known opportunities.** NTA priorities shift towards food-waste reduction, local sourcing and producer capacity-building when respondents look ahead to 2030; large operators can act as anchor buyers and investors in local production; bioeconomy pathways can keep organic material in productive use; and well-designed interventions create economic, health and social value at the same time.
- **Known unknowns.** What should be measured, by whom and at what level; whether barriers are sequential or substitutable; whether local sourcing can scale against concentrated procurement; how models built on large balance sheets can be adapted for smaller operators and resource-constrained destinations; and who ultimately benefits.

Figure 3. Two headline patterns from the F4G NTA Survey 2026 recalled in the Challenge Note. Left: presence of food-related policy, definitions and data collection among responding NTAs. Right: share of NTAs reporting that tourism food supply is mostly or nearly all imported, SIDS compared with non-SIDS (Q28 respondents, n = 44).



What we heard in the room

This section organises the facilitators' group records (five notes covering the four groups), the photographed flipcharts from the in-room groups, the transcribed audio record of one in-room group and of the closing plenary, supplementary notes from the facilitation team and the plenary notes against the structure of the day. Quotations are paraphrased from facilitators' notes and are not attributed. Where a participant described a named programme or destination example, it is given as they described it and has not yet been independently verified.

Defining impact: from scale to propagation

The opening plenary converged on a working definition of impact as value created for the destination food system and its stakeholders that is measurable, inclusive and identifiable as a positive outcome in its own right. The most consequential refinement was a distinction between **scale and propagation**: many interventions can propagate at the scale appropriate to them, and the decisive factor is a network effect rather than size. Each stakeholder type brought a distinct emphasis. A multilateral participant framed impact as a chain from policy to incentives to action; a hotel group as destination-level impact for food communities; a technology provider as measurement and data; another hotel group as "the right food produced by the right kind of agriculture"; a third as transformed guest habits and expectations, including nudges at breakfast and awareness-raising that pairs appreciation of local recipes with the carbon footprint of waste; the funding foundation as social inclusion; and a tour operator as solutions that can be driven into the mainstream of tourism and act as levers. A measurement provider noted that even the definition of food waste differs from one chef to the next. One in-room group carried two framings forward from this discussion, recorded on its flipcharts as "the right food choices delivered by the right kind of supplier" and "how does the system know what the system knows?"; these anchored much of its later work on demand and on data.

Assets the system already holds

Asked what the system already has a lot of, groups produced long lists that clustered into five categories (Table 1). Two features stand out. First, the assets most readily named were relational and reputational rather than physical: brand, influence over guests and policymakers, convening power and unused budget lines. Second, several groups identified assets that sit outside the tourism sector as conventionally defined, from empty cargo capacity on return legs to the expertise of insurers and the willingness of farmers to restore soil once they see a market.

Table 1. Assets identified across the four groups, by cluster. Items are paraphrased from group records; examples in brackets are as described by participants.

Cluster	Assets named by participants
People and knowledge	Youth and innovators; farmers and fishers willing to engage; technical-level policymakers in ministries; chefs, including a new generation engaged in sustainability, and chef networks; women cooks and recipes passed down through families; culinary skills and gastronomy laboratories for testing zero-waste recipes; scientists working on behaviour change and on data; indigenous and traditional knowledge, including research on heritage crops and local species (some 480 native potato varieties worked with by a chef in Cusco, Peru; work on local species in northern Pakistan); permanent technical civil servants and think tanks as allies that outlast ministers; multidisciplinary teams able to find the "treasure" in waste streams; front-line and F&B staff, reachable through "food literacy" training that moves knowledge from CSR teams into kitchens; the one in ten people employed in tourism as potential ambassadors.
Influence and reach	Brand awareness and the trust of consumers; captive audiences in destinations, on board aircraft and ships, and the communication channels that reach them; influence within policymaker networks; the convening power of associations; celebrities and ambassadors; the capacity of large operators to change guest and staff behaviour through nudges.
Resources and capacity	Budgets ring-fenced for social or sustainability purposes as distinct from operating budgets (participants' own term was the "social" budget); empty cargo space on aircraft and ships returning from destinations; food surplus and seasonal gluts; employee canteens as an alternative channel for surplus; donation systems and the willingness to donate; land, water, biodiversity and local products; fisheries and the blue economy; diaspora investment (Cabo Verde).
Data and tools	Food-waste measurement tools, benchmarking and pilot experience in hotels; demand forecasts held by tour operators, who sell years ahead and could share them with the agri-food community, most valuable when demand falls; weather forecasting and its implications for crops; national data on which staples are imported (one Gulf destination was cited as importing around 80 per cent); measurement technology already installed in thousands of sites across some 100 countries; existing ESG and disclosure frameworks; accumulated experience of what has and has not worked.
Institutions and policy	National circular economy policies and roadmaps for tourism, agriculture and fisheries (Peru); regional circular economy legislation requiring a share of local produce (Balearic Islands, 2024);

Cluster	Assets named by participants
	national gastronomy strategies and UN Tourism Best Tourism Villages; experience of working directly with regulators, such as airline recycling pilots that brought caterers, ground handlers and regulators on board aircraft; farmer organisations and cooperatives as intermediaries that guarantee volumes, predictable prices, pooled logistics and a certification "stamp"; restaurants and collective catering as the channel through which destination-level scale is reached; waste contract holders, who decide what is possible at the end of the chain; independent third parties able to host pre-competitive collaboration.

Blindspots, bottlenecks and dealbreakers

Groups took their two preferred ideas from the asset exercise and stress-tested them. One facilitator observed that blockers surfaced faster than problems, which suggests a room ready to act but also a risk of solution-first thinking that the synthesis will need to guard against. Table 2 consolidates the flags raised across all groups.

Table 2. Unintended consequence marking: consolidated flags from the four groups.

Lens	What participants flagged
Dealbreakers (what could make an idea impossible)	No consensus on what "right food" means, and the risk that a planetary-diet frame reads as Western in destinations where meat matters culturally. Loss of brand differentiation if every operator adopts the same value proposition, so that only an external force such as government can make system-wide change stick. Regulatory divergence between destinations for operators that move internationally (cruise, aviation), including food safety rules such as pasteurisation and biosecurity rules that prevent diversion. Certification requirements that exclude producers who farm regeneratively but are not certified. Opposition from importers and wholesalers to any rule of thumb on local supply. Major external crises that shift government budgets and business priorities away from sustainability. Entrenched and vested interests, and political actors opposed to data collaboration. Competition law: one hotel group reported that a procurement coalition intended to send demand signals for more sustainable products was "boiled down to the minimum" because pooling volumes risks being read as market manipulation. Political headwinds and industrial-scale disinformation: participants reported having to remove words such as "sustainability" and "resilience" from funding proposals, which makes the Roadmap a communications challenge as well as a strategy challenge. For insurers, a straightforward reduction in profit unless risk-sharing is framed as a wider resilience play.
Bottlenecks (what participants wished they had more of)	Shared data: information is collected separately and not shared even within organisations (procurement and operations data are misaligned within a single hotel group because one treats the hotel and the other the destination as the unit, and data collected on paper is discarded), nobody is paid to share and "data is power", a smallholder cannot be asked to measure waste granularly where the data has no value to them, hotels are asked for the same data many times over, national indicators are disconnected from the indicators that support operational decisions, incentives to share and a common format are lacking, SMEs lack the capacity and budget to collect data, technical expertise and digital literacy are thin, the barrier to AI for SMEs is the cost of collection rather than compute, and nobody plays the orchestrating role. Storage space and food transport infrastructure, and end-of-chain capacity for sorting, cold storage, composting, recycling and redistribution, all of which vary from port to port and island to island. Natural resource limits, above all water and land, in small islands: one island in Cabo Verde was described as unable to produce its own food and distant from the centre, so that the government's task is to plan for food to arrive at the right time. Finance and a demonstrable business case, especially where circular practices already exist but savings are not measured; the cost of local and organic produce under cost pressure on suppliers, operators and guests alike. Producer capacity, certification and consistency of volume and quality; no new generation of farmers and fishers entering production; producers who are risk-averse and "do not want a thousand contracts", so that supermarkets and large aggregators remain the reliable buyer. The CSR wish-list ("organic, local, vegetarian and cheap") describes a product that often does not exist. Climate shocks such as El Niño that redirect government budgets and reduce delivery capacity, so that implementation becomes episodic. Small volumes, food safety requirements and collection logistics that make donation impractical. Seasonality mismatches between tourism demand and harvests. Storage space on ships. Pride in local food, which small destinations often lack. The internal disconnect between corporate sustainability and operations teams. A communication gap to guests whose expectations remain "eat, drink and be merry", and a lack of network or community among

Lens	What participants flagged
	those trying to change this.
Blindspots (what might surprise us)	The assumption that customers will pay a premium for a changed value proposition. The commoditisation of food in the supply chain and guests' demand for the familiar, set against evidence that expectations are changing and that the industry may be behind them in assuming guests resist change; holidays are experienced as "escape, luxury and freedom, not guilt", and pandemic-era service changes that cut waste and cost have largely been reversed. Whose values define "right" food ("says who?"), which led one group to reframe the goal as respectful food choices: respectful of planet, cultures, health and local suppliers. "Local does not automatically mean sustainable": labour and child-labour risks and weak traceability in local supply chains. "Beware the one solution": large-scale answers meet local complexity, local climate and infrastructure, and the room itself noted "not enough systems thinking" and the danger of not checking assumptions. The assumption that hotels fear insufficient local supply while farmers fear hotels will not buy, when a network could resolve both. The assumption that farmers do not want new technology. Wholesalers and wholesale markets as an unmapped layer that can block or enable sustainability. Measurement tools that work in large hotels but not in small operations. Reducing food loaded on board reduces waste but may harm upstream caterers. In some destinations, basic tourism infrastructure is more urgent than advanced food-waste solutions. Tourist demand can draw food and resources away from residents, particularly where small ships reach remote places. Overestimating how far competitors already collaborate ("we do not do joint procurement on engines"). Conflict and geopolitical instability that disrupt tourism flows and food imports at once, and the need to be realistic about what the sector controls, what it influences and what lies beyond both. Information overload, with definitions and values that vary by data provider, and the risk of duplicated or over-complicated data capture. Shifts in demand from pharmaceutical and lifestyle trends (GLP-1 medication, plant-based diets), geographic shifts in tourism towards Asia, climate impacts on current destinations and on what can be grown, and the gap between late booking behaviour and agricultural lead times. The absence of the SME perspective in the room.

Where value is captured, missed, destroyed or absent

Working from the printed stakeholder map, groups traced what each actor gives to the system and what it gets back, using the six value exchanges of the Cambridge value-mapping framework. Table 3 shows the pattern. Value that is **missed** and **absent** clustered around the producer-to-buyer interface and around data; value that is **destroyed** clustered around international catering rules and exposure to shocks; and the **opportunities** groups discovered together sat almost entirely in new connections between actors who do not currently transact. Groups named international tour operators and large buyers, importers and wholesalers, international regulators and insurers as the actors holding most leverage.

Table 3. Value exchanges identified in Session 2. Examples are as described by participants.

Value exchange	What participants observed
Captured (I give and get a return)	Airline recycling pilots that brought caterers, ground handlers and regulators together to see the on-board to ground process. Hotels in Peru sourcing directly from farmers and using kitchen organic waste as compost on their own farms. Peru's planned national circular economy seal.
Missed (I give but get no return)	Producers not connected to hotels and other buyers. Hotel circular practices whose economic value is not demonstrated for lack of data. Heritage products and knowledge have been overlooked by tourism gastronomy. A tour guide in Burkina Faso described visitors arriving with their own food; persuading them to eat locally created work for cooks and young people. Producers who supply premium goods are paid commodity rates. No insurance for producers when a buyer fails.
Destroyed (I give but you do not want it)	Usable international catering food incinerated or landfilled because rules restrict diversion. Value lost to shocks: contamination events, climate change, geopolitical instability, cyber and security incidents.
Absent (you want it but I do not give it)	Cost and savings data on circular practices (Peru is working with EU support on measurement). Visibility of the producers behind distributors. Reliable contracts for producers,

Value exchange	What participants observed
	who stay with supermarkets because those buyers are always there. Recycling and surplus-diversion infrastructure. Traceability. Redirection of fines paid by large technology firms into investment in tourism SMEs.
Surplus (I have too much)	Post-service surplus in hotels and aircraft that cannot be donated. Seasonal gluts (mangoes in Cabo Verde, shoulder-season yields) larger than the local market can absorb and lacking the storage, processing and certification that would let tourism take them up. Insurers' risk knowledge not connected to the SME market. Margin and know-how in one brand that could be shared.
Opportunity (we discover new value together)	Connecting the separate circular economy roadmaps for agriculture, industry and tourism so that producers, processors and tourism "complete the circle" (Peru). Turning hotel-by-hotel local purchasing into group policy. Gastronomy that brings native or paired local products (wine and cheese in Cabo Verde) into the visitor experience. A supplier willing to build a local production facility once demand was pooled across several hotels rather than for one. Insurers sharing insight with cooperatives; microfinance; AI to price risk and trace inputs.

Visions of 2040 and the pathways towards them

Asked to picture a destination food system that works in 2040, the groups described convergent futures from different starting points. In one, data is a predictive rather than reactive tool, no longer a competitive edge, aligned to a global standard yet granular enough to be useful locally, "democratised like weather data", translated for different audiences and used to connect actors; decisions are guided by data but balanced with human judgement, quick wins are prioritised so that the system makes "new mistakes, not old ones", capacity sits close to the action, and tourism, because it has data, is part of the national food agenda. The same group pictured guests who eat better, more local food and know where it comes from because the right choice has been pre-selected for them ("we only offer the local fish, no salmon, and everyone is happy"), producers valued at the centre of the system, and behavioural shifts such as smaller plates and low-alcohol demand treated as opportunities for new products. In another, local supply chains are stronger, producers participate year-round on predictable demand, tourism food is seasonal and locally adapted where feasible, overproduction and waste are markedly reduced, biodiversity and indigenous knowledge are valued through gastronomy, and tourism, agriculture, industry and environmental policies are aligned around common circular goals. In a third, all residents have access to the food they need, tourism development is shaped locally as part of the destination ecosystem rather than mandated from abroad, and the environmental footprint of a tourist is no greater than that of a resident. The in-room group that worked on data added four design principles: subsidiarity, with data available "as close to the action as possible, and no closer"; agility, since Europe's summer of 2026 arrived earlier than climate projections had suggested and what can be grown where will keep shifting; scope discipline, breaking the food life cycle into around five stages and pursuing the top three wins in each rather than "everything everywhere all at once"; and borrowing from sectors that have harmonised data at speed, such as finance. It coined "data dating" for the use of shared data to connect producers, buyers and destinations facing similar problems. Table 4 summarises the horizon exercise.

Table 4. The now-to-2040 horizon as completed by the groups.

Now to 2030: what fades	2030 to 2035: what transitions	2035 to 2040: what emerges
The "everything available all the time" mindset and buffet abundance norms. Collecting data that does not move the needle. Treating international catering surplus automatically as waste. Homogenised menus that put pressure on a few products. Imports where local alternatives exist. Regulation imposed without explaining why.	Infrastructure for separation, preservation and redistribution. Local and seasonal sourcing with processing for seasonal products. A small common set of consumption and waste metrics and an aligned taxonomy. Harmonised regulation across sectors and jurisdictions based on quantitative risk assessment. Producer cooperatives and networks. Demonstrated business cases and blended finance for local supply.	Producer networks connected directly to tourism buyers. Demand forecasting that links tourism flows to local production. Data as a predictive tool, shared across competitors through third-party facilitation. Closed-loop and bioeconomy systems in the mainstream. Indigenous and traditional products integrated into tourism gastronomy. Integrated governance across tourism, agriculture, industry and environment.



The governance levers named most often were accountability frameworks; disclosure that goes beyond emissions to climate risk and to the footprint of tourists relative to residents; minimum guaranteed prices for producers; specific targets, with the caution that grams per guest is not enough; limits on where money can flow; fiscal incentives for intermediaries that contract producers on fair terms; input traceability; governments requiring the submission of data, potentially using the UN Tourism ESG framework as the metric set; national restrictions on some foods, by analogy with tobacco, or a maximum distance that food may travel as a less blunt alternative; redirecting agricultural subsidies from volume towards practice; pooling the common assets of small producers or small island states into an investable asset class, drawing on Commonwealth SIDS experience; a resilience fund for agriculture that tourism and insurers might capitalise; qualifying start-up suppliers so that coordinated purchasing commitments fall outside competition rules; venture philanthropy as "first money in" to attract development banks and other capital; microfinance already available to producers through public subsidy; and chef training so that the better choice is also the tastier one. One group used the impact and policy matrix to distinguish impacts to track now (surplus diverted from landfill and incineration; use of local products and suppliers) from impacts to scenario-plan (climate effects on local availability; shifts in demand and consumer behaviour), and policy needs to prioritise (harmonised regulation across jurisdictions) from those to park for later (a global framework for international catering surplus).

Four pathway pitches

Each group closed by shaping its strongest idea into a short NABC pitch for UN Tourism and partners. The four pitches are complementary rather than competing, and together they map onto the four leverage domains the Challenge Note anticipated: information, market structure, rules and demand (Table 5).

Table 5. The four NABC pitches presented in the collective discussion. Wording follows the group records; titles are the groups' own where one was agreed.

Pitch	Need	Approach	Benefits and competition
"If you know, you know" and "Project bring back the love" (in-room group)	At destination level there is no picture of what is consumed or wasted, or of the behaviours driving it; data standards, shared understanding and coordination are lacking, and customers still ask for harmful products.	Three steps: measure, expand, involve government. Secure buy-in at head-of-government level in around ten destinations most affected by imported food, prioritising countries whose national food-systems pathways are advanced and pairing them with less advanced destinations; use existing measurement tools against a small number of core metrics, then expand; identify two or three imported and wasted products per destination to bring back into local production and use behavioural science to build guest demand. Financing (development banks on a climate-adaptation model; venture philanthropy) was acknowledged to be "hidden in the word incentivised".	Reduced cost, waste and carbon for businesses; food security; bioeconomy opportunities; a richer guest experience. Competition is fragmentation itself; the pitch invoked the weight of a sector worth around ten per cent of global GDP (including direct, indirect and induced impacts), venture philanthropy and a corporate ESG sponsor for a data platform. The group itself warned against arriving in 2040 with "a perfect data ecosystem and nothing happened on the ground".

Pitch	Need	Approach	Benefits and competition
"Collectivisation" (in-room group)	Local economies need to be more resilient and adaptable; producers lack negotiating power, training, financing and storage.	Farmer producer organisations or cooperatives with member ownership, seeded by capital and subsidised debt, possibly financed from tourist-sending countries; the collective buys from members, stores, negotiates insurance and invests in knowledge; government guarantees a minimum price. A seller collective removes the need for a buyer coalition by creating a one-stop shop.	Better prices and negotiating power for producers; food security and a reliable supply for brands, who can tell guests where their eggs come from; a training base. Competition from industrial farming, offset because "everyone wants to buy locally". Open question: who resources it.
Regulatory harmonisation for catering surplus (online group)	Reduce food waste and make food surplus available; the group could not choose a single need and kept both.	Harmonise and standardise regulation across jurisdictions on the basis of quantitative risk assessment so that usable international catering food is treated as surplus rather than waste; invest in data collection; use new technologies and a shared platform to distribute surplus, share practice, connect actors and promote destinations that practise circularity.	Less food to landfill and incineration and lower emissions; incentives and economies of scale; visibility and recognition for circular destinations and businesses; social value from recognising traditional knowledge and local products. Alternative: continued fragmented national and company-level initiatives.
Network of destinations sharing practice (online group, which spoke of a platform for "intelligent destinations")	Destinations are disconnected from one another and from their own producers; small destinations undervalue their own food and offer international menus instead.	A network of destinations sharing practice on sustainable sourcing, seasonality and preservation, in which destinations build pride in and respect for their local culinary identity while visitors learn to recognise, value and seek out authentic local cuisine, creating demand that reinforces the value of local food within host communities; investment paired with visitor demand; awareness campaigns that give governments an incentive through visibility and recognition. If the platform is developed, the established term "smart destinations" is recommended for it.	Indigenous knowledge and cultural heritage valued; environmental preservation; a more diverse culinary landscape and a more authentic experience. Competition not explicitly recorded.

Cross-cutting observations and points of tension

Nine themes recur across the group records. They are offered as hypotheses for the synthesis rather than conclusions, and the tensions within them are noted deliberately.

1. **Data as the connective tissue of the system.** Every group treated shared measurement as the precondition for almost everything else, and one framed the design question as "how does the system know everything the system knows?" The tension is between this ambition and the realities of competition law, commercial sensitivity, cost and duplication. Pre-competitive collaboration facilitated by a trusted third party was the most common resolution offered; the finance and insurance industries were cited as sectors that have harmonised data successfully. The stakeholders this group listed as necessary were policymakers, large technology companies (for resources and expertise), global foundations, large hotel chains, a third-party facilitator, legal frameworks and local governments that demand and collect data.
2. **Aggregation on the supply side.** Both in-room groups and one online group converged on some form of producer collective, cooperative or wholesale intermediary as the mechanism that resolves quality, volume, certification, logistics and bargaining power at once. The tension is whether aggregation is best

organised by producers, by buyers, by government or by a new intermediary, and who bears the cost of transition. A further tension sits within one in-room group's own record: alongside collectivisation it imagined small producers supplying many hotels with less intermediation, made reliable by trust, certification and fiscal incentives, and asked whether intermediaries might become public bodies or cooperatives sharing collective intelligence.

3. **Who moves first on rules.** Participants disagreed on whether governments should regulate first or industry should establish best practice that later becomes standard. There was more agreement that regulation should explain its purpose, be based on quantified risk, and be harmonised across the jurisdictions that mobile operators cross.
4. **Shaping demand rather than only serving it.** Nudges, menu design, portion control, seasonal offers and storytelling were seen as within tourism's own gift. The tension is between "the right food" as a nutritional and environmental judgement and the cultural specificity of destinations; several participants warned against a single dietary frame. The only F&B practitioner in one room listed the criteria that govern purchasing in practice: certification, locality, cost, security of supply and hygiene.
5. **The sphere of influence.** The closing plenary asked where tourism can lead (awareness, promotion of local product, procurement standards, guest behaviour) and where it depends on the wider system (agriculture, trade, infrastructure, biosecurity) and should position itself as an accelerator rather than an owner of the problem.
6. **Finance and risk.** Insurance as a route to de-risk the transition for small producers, venture philanthropy to attract other capital, redirected fines, blended finance and subsidies tied to insurance logic all appeared; the co-host group singled out the role of insurance, and how to influence investors and the largest brands, as the questions most deserving of further work. The unresolved question, raised in more than one group, was who pays and how short-term political and commercial returns are reconciled with a 2040 horizon.
7. **Foresight about tourism itself.** Several participants argued that a 2040 roadmap must start from what tourism will look like in 2040: a shift in demand towards Asia, climate impacts on today's leading destinations and on what can be grown, biotechnology in food preservation, vertical farming, changing diets and pharmaceutical influences on appetite, and booking behaviour that is far shorter than agricultural lead times.
8. **Tourism's seat at the national food table.** Participants observed that the national food-systems pathways that followed the UN Food Systems Summit involve no tourism entities, that tourism ministries are rarely present when core cabinet decisions are taken or at climate negotiations, and that the counterpart for this agenda is the ministry responsible for development planning and finance rather than agriculture alone. The Roadmap would therefore need to equip tourism policymakers to make that case, with permanent technical civil servants and think tanks as allies that outlast ministerial turnover.
9. **Upstream action and interdependence along the chain.** Across the groups, the emphasis fell on the upstream parts of the food system, on how food is produced, sourced, processed, transported, purchased and valued, rather than on waste reduction at the point of consumption alone. For tourism this means strengthening local and sustainable production, improving procurement and supply-chain linkages, supporting responsible sourcing, encouraging seasonal and locally appropriate food, and aligning tourism demand with the capacity of local food systems. Food waste reduction remains important but was framed as one part of a broader effort to prevent unsustainable practice and value loss throughout the system. Participants also stressed that the performance of each part of the chain, from production and processing to distribution, hospitality and tourism, conditions the performance and resilience of the whole, so that collaboration across sub-sectors is a condition of progress rather than an optional extra.

The disagreements recorded explicitly in one in-room group illustrate these tensions: whether commoditisation or changing guest expectations is the stronger force; whether a minimum local-sourcing threshold should be set or is meaningless where even five per cent local supply is impossible; whether efficiency or health should be the organising metric, given that "efficiency generated the problems"; whether to remove choices or to nudge; bans or maximum food-travel distances; and market or subsidy as the engine of change. The group also asked whether it had been naive in not grounding its ideas in short- and medium-term political and commercial returns, and whether enough proof points exist to make that case.



Voices missing from the room

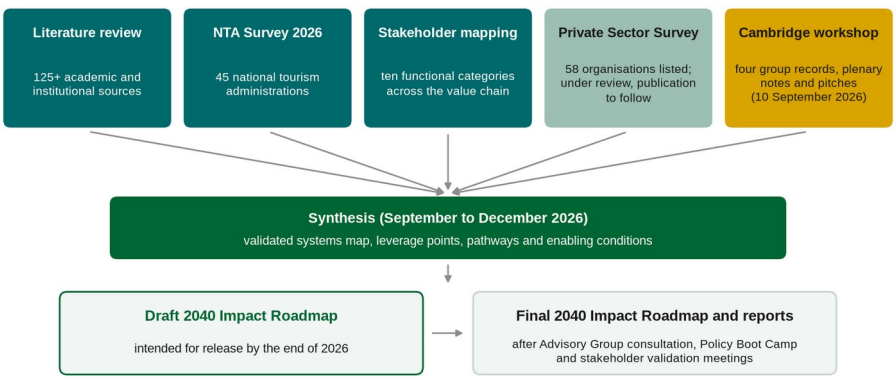
In the closing reflections, participants themselves identified the perspectives that were absent or under-represented: small and medium-sized enterprises, farmers and fishers (described by one group as "the baseline of the system and the weakest element"), wholesalers, importers and waste contract holders, waste pickers, permanent civil servants, front-line staff, youth and innovators, whose future the 2040 horizon describes, consumers, climate and health expertise, and nature as a stakeholder in its own right. Several participants noted that many in the room already knew one another and asked whether the group was "in a slight echo chamber"; one asked for more attention to the governance and accountability of those who hold power in the system, including philanthropists, media, social media and large technology firms. A representative of a Small Island Developing State asked for better communication to help small farmers re-enter the tourism value chain and for attention to inter-island transport and market access. These gaps shape the stakeholder validation meetings planned for the next phase (Section 6). An airline association representative observed that the groups discussed social value and jobs but did not put a cost or a monetary value against any action, and asked that a systems map be among the outputs; a government representative said the day had given her a concrete task, to work with the airline catering sector so that surplus food is used rather than wasted. Participants also reflected that the workshop was a first step in a larger initiative to which each partner should invite others, and several said the divergence-and-convergence method was one they would carry into their own organisations.

How the workshop evidence will be used

The workshop closed the first research phase of Tourism Food for Good and opened the second. The facilitators' group records and supplementary notes, the in-room flipcharts, the Mural boards, the pitch captures, the transcripts of one in-room group and of the closing plenary, and the recordings of the online rooms (held on University of Cambridge servers and used only for research) are being transcribed and coded manually by the CRSD research team, with review by UN Tourism, against the Cambridge Impact Roadmapping categories: impact definitions, assets, blindspots, bottlenecks and dealbreakers, the six value exchanges, transition levers, capabilities and horizons. The resulting matrix will remain non-attributional. The coding will also record which Challenge Note leverage points did not surface in a given group; franchise and management-contract structures and brand standards, for example, were not raised in one in-room group, while international catering rules were prominent online. Participants' requests for a systems map and for costed actions will be taken into the Draft Roadmap.

The coded workshop material will then be triangulated with the four existing evidence streams (Figure 4). The literature review and stakeholder mapping supply the systems framing and the actor map that the workshop was asked to validate; the NTA Survey 2026 supplies the national baseline against which the pitches will be tested in different institutional contexts; and the F4G Private Sector Survey, currently under official review ahead of publication, supplies the industry counterpart (Annex B). Following the method of multiple working hypotheses, the four pathways will be treated as competing and complementary propositions to be tested against all five sources rather than as a shortlist to be ranked.

Figure 4. From five evidence streams to the Draft 2040 Impact Roadmap. The workshop material is one of five inputs to the synthesis; none is treated as decisive on its own.



The synthesis will form the **Draft 2040 Impact Roadmap for Sustainable Food Systems in Tourism**, which the partners intend to release by the end of 2026. The Draft will set out a validated systems map, the pathways that survive triangulation, the enabling conditions each requires and a proposed sequence across the 2030, 2035 and 2040 horizons. The Advisory Group consultation, the Policy Boot Camp and stakeholder validation meetings will then inform the final Roadmap.

Next steps and how the Advisory Group can contribute

In the closing round the research team made three commitments: workshop participants remain connected to the project as advisors and will receive its further outputs; the team will now work upstream with producers, suppliers and caterers, and asked participants to share contacts and to circulate the Challenge Note within their networks; and the Cambridge Policy Boot Camp will work through the governance and accountability questions raised in the workshop as actual policy with a national administration.

Table 6. Indicative timeline from the workshop to the final Roadmap.

When	Activity
28 September 2026	This Workshop Summary Note circulated to the Advisory Group and workshop participants.
September to October 2026	Coding of the workshop material; triangulation with the Challenge Note evidence; finalisation of the Private Sector Survey report.
20 October 2026	Second Advisory Group consultation (online): test this Note, review the four pathways, agree the emphasis of the Draft Roadmap.
October to November 2026	Private Sector Survey published; country-level Policy Boot Camp; stakeholder validation meetings prioritising the missing voices.
By end of 2026	Release of the Draft 2040 Impact Roadmap.
Early 2027	Consolidation of feedback on the Draft; drafting of the final 2040 Impact Roadmap and reports.

Advisory Group members are invited to respond to any of the following questions before 20 October, at the consultation itself or in writing to Professor Nazia M. Habib (nsh29@cam.ac.uk), Ms Virginia Fernandez-Trapa (vftrapa@untourism.int) or Mr Manuel Ferreira (manuel.ferreira@tui.com).

1. Does this Note reflect what you heard on 10 September? Is anything material missing or misrepresented?
2. Which of the four pathways is most credible in the contexts you know best, and what would break it?
3. Which of the missing voices (SMEs, farmers and fishers, wholesalers and waste contractors, youth, consumers, health and climate expertise) can you help bring into the validation meetings?
4. What data, cases, cost figures or programmes could your organisation or country share to test the pathways before the Draft Roadmap is finalised?
5. Looking back from 2040, what must be true by 2030 for your organisation to have played its part, and what would you need from the other partners?

Annex A. Organisations registered for the workshop

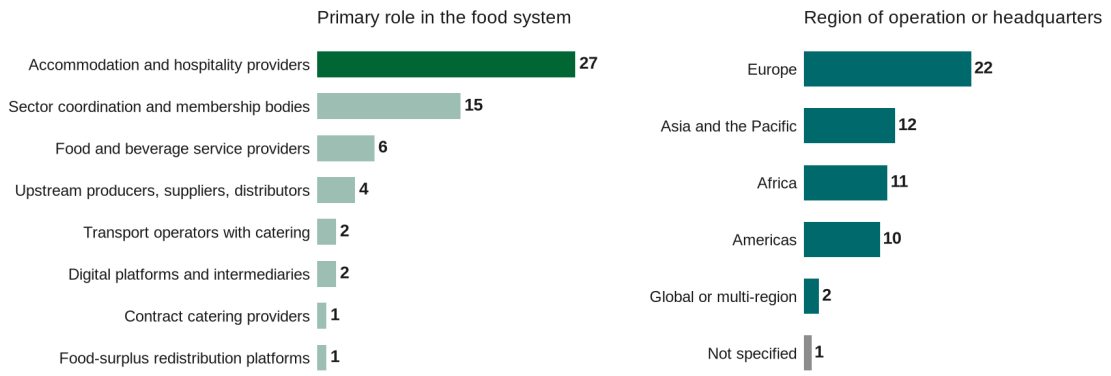
The organisations below registered for the workshop through the RSVP process and were assigned to a co-creation group. Listing does not attribute any statement in this Note to any organisation. The facilitation team was drawn from the Centre for Resilience and Sustainable Development (University of Cambridge), UN Tourism and the TUI Care Foundation, with support from Bioss International.

Category	Organisations
Tourism businesses and technology providers	Abra Group; Accor; Cathay Pacific; easyJet holidays; Iberostar Group; ITC Hotels; KITRO; Minor Hotels Europe and Americas; Minor International; Olio; PONANT; Radisson Hotel Group; TUI Group; Winnow.
National tourism administrations and ministries	Bahrain; Burkina Faso; Cabo Verde; Greece (Ministry of Tourism); Indonesia; Peru (MINCETUR).
Industry associations	Cruise Lines International Association (CLIA); International Air Transport Association (IATA); World Sustainable Hospitality Alliance.
Foundations and NGOs	Futouris; Travalyst; TUI Care Foundation.
Multilateral organisations	Asian Development Bank; UN Tourism; United Nations Environment Programme (UNEP).
Academic institutions	Basque Culinary Center; Lombok Tourism Polytechnic; University of Cambridge (Centre for Resilience and Sustainable Development; Institute for Manufacturing; Department of Engineering).

Annex B. Profile of F4G Private Sector Survey respondents

The F4G Private Sector Survey captured how tourism-linked businesses and sector bodies are already engaging with food-system sustainability. Its results are under official review and will be published separately. Figure 5 profiles the organisations that completed the survey in full, as listed in Table 2 of the Challenge Note, by primary role in the food system and by region of operation or headquarters. Just under half answered for a single entity; the remainder answered for national, sub-national, multi-country or global portfolios, including several of the largest hotel, cruise and airline groups.

Figure 5. Organisations completing the F4G Private Sector Survey in full, by primary role and region (n = 58 listed). Regions follow the UN Tourism regional groupings; "global or multi-region" denotes respondents who indicated that scope.



Read alongside the NTA Survey 2026, the Private Sector Survey gives the synthesis a paired view of the same system from the public and private sides. Its findings on measurement practice, local sourcing, surplus management and perceived barriers will be used to test the four workshop pathways for industry feasibility before the Draft Roadmap is released.