



THE €11 BILLION OPPORTUNITY:

Unlocking the economic potential of plant-forward
public food procurement in the EU



ABOUT THIS DOCUMENT

This policy report was developed based on original economic modeling commissioned from Bryant Research by ProVeg International. The research quantifies the budget, health, and environmental returns of shifting public food procurement across the EU27 toward plant-source foods. Methodology and full datasets are detailed in the accompanying **Technical Appendices**, which can be accessed via the QR code below.



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ProVeg International works to accelerate the transition to a sustainable global food system by making plant-rich foods and alternative proteins more accessible and appealing. ProVeg engages with all relevant stakeholders to create a world where the food we eat is good for all people, animals, and our planet. ProVeg creates global impact, with offices in 14 countries across five continents and more than 250 employees.

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The views expressed in this brief are those of ProVeg International and do not necessarily reflect the individual views of the researchers or their affiliated institutions.

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EXECUTIVE SUMMARY

The European Union has recognised the need for public food procurement to move beyond lowest cost and to reward sustainability and social goals. The current question is which frameworks deliver these benefits while minimising red tape and maintaining or even enhancing economic competitiveness.



This report demonstrates that food procurement standards prioritising plant-source foods offer a solution to these challenges. We conducted bespoke economic analyses across all 27 EU Member States, quantifying the economic impact of shifting to plant-forward¹ public procurement.

Under our ambitious target scenario of allocating 85% of public food procurement budgets to plant-source foods, the EU would unlock roughly €11.61 billion per year in combined savings:



€3.16 BILLION

in direct budget savings:

plant-forward menus cost less at the ingredient level, freeing funds for other priorities such as organic and local sourcing.



€4.08 BILLION

in social health cost reductions,

valued using the OECD's value-of-statistical-life methodology applied to IHME Global Burden of Disease data.



€4.37 BILLION

in environmental externality reductions, covering climate, air and water pollution, land use, and scarce water withdrawal. We monetise these using True Cost Pricing methodology.

Plant-forward public procurement is consistent with the EU's strategic food priorities: it creates stable demand for EU-grown legumes, strengthening food security and strategic protein autonomy. It supports farmer diversification in line with the Common Agricultural Policy (CAP) 2028–2034 proposals. Lastly, it respects diverse culinary traditions through a simple budget-share rule rather than prescriptive menus.

WE RECOMMEND FIVE POLICY PACKAGES TO CAPTURE THESE SAVINGS:



1. AMEND THE EU PUBLIC PROCUREMENT DIRECTIVE

to replace lowest-cost bidding with sustainability-weighted evaluation that internalises environmental and health externalities, and introduce a minimum 25% organic sourcing target for public food procurement.



2. REFORM THE EU SCHOOL SCHEME

to expand eligible categories to include legumes and fortified unsweetened plant-based drinks.



3. UPSKILL THE CATERING WORKFORCE

by directing European Social Fund Plus (ESF+) funding toward training chefs to deliver nutritionally complete plant-forward menus.



4. SUPPORT FARMERS

by establishing conditional supply contracts and a dedicated transition grant fund to de-risk those who want to transition to food-grade plant protein.



5. IMPLEMENT BEHAVIORAL NUDGES

that are science-based and preserve freedom of choice, including plant-based defaults, strategic menu placement, and sensory focused labelling.



THE ECONOMIC CASE FOR PLANT-FORWARD PUBLIC FOOD PROCUREMENT

Every year, EU public institutions spend an estimated €45.8 billion on food, feeding up to 54 million people daily across schools, hospitals, care homes, universities, military facilities, and prisons (see Technical Appendix 2). How that budget is allocated has profound consequences for public health, the environment, and the EU's fiscal position.

There is broad consensus across EU institutions that public catering must move toward sustainable food procurement, integrating environmental, social, and economic factors. The Strategic Dialogue on the Future of EU Agriculture, the Commission's 2025 Vision for Agriculture and Food, and the EU Joint Research Centre's 2025 Criteria for Sustainable Public Procurement (JRC SPP) for Food all converge in this direction.^{2 3 4} The remaining question is which policy levers deliver on this vision. Our analysis shows that tipping Europe's public food further towards plant-source foods would have powerful benefits along multiple dimensions of sustainability and health, while reducing costs and minimising regulatory complexity.

Our analysis indicates that approximately 43% of EU public food procurement spending goes to

animal-source foods (see Technical Appendix 1) with 57% going towards plant-source foods. This results in a dietary imbalance: insufficient vegetables, legumes, and overall dietary fibre, and overconsumption of meat relative to evidence-based dietary guidance. It is well established in the medical literature that this imbalance leads to elevated rates of cardiovascular disease, colorectal cancer, and type 2 diabetes.⁵ The IHME Global Burden of Disease 2023 study attributes over 130,000 preventable deaths per year across the EU27 to these dietary patterns – one preventable death every four minutes.⁶ The same imbalance takes a toll on the environment: heavier procurement spending on animal-source foods results in higher externalised costs from greenhouse gas emissions, air and water pollution, land degradation, and freshwater depletion (see Technical Appendix 3).

These environmental harms translate into real fiscal costs that must be paid sooner or later in the forms of healthcare burdens, ecosystem restoration, and climate adaptation. To make these costs concrete, we conducted novel economic modelling across all 27 EU Member States. We quantify three cost streams associated with our balance of animal- vs plant-source foods in public institutions: direct budget savings from the lower ingredient cost of

Percentage of public food procurement budget allocated to plant-based (PB)	 Budget savings	 Environmental savings	 Health savings (societal)	 Total savings
65% PB	€0.87B	€1.21B	€1.13B	€3.21B
75% PB	€2.02B	€2.79B	€2.60B	€7.41B
85% PB	€3.16B	€4.37B	€4.08B	€11.61B

Table 1. Savings of plant-forward public food procurement budget scenarios

THE OPPORTUNITY OF PLANT-FORWARD PROCUREMENT FOR THE EU

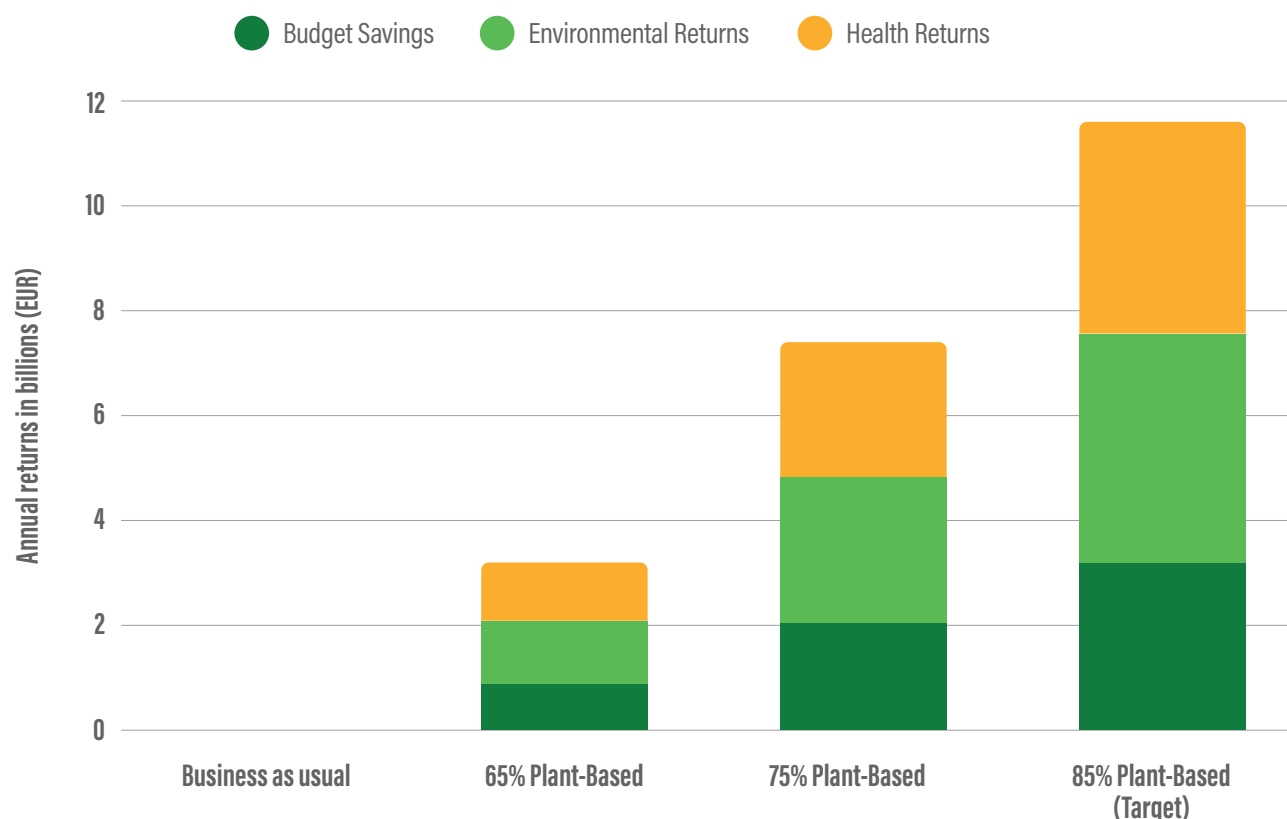


Figure 1: Savings of plant-forward public food procurement budget scenarios

plant-forward meals, environmental externalities, and the health burden of dietary disease. We then model the returns to rebalancing public procurement budgets towards plant-source food. We model three scenarios: a minimal 65% allocation, a 75% allocation, and a target 85% allocation. This 85% plant-forward budget target allocation is informed by the EAT-Lancet Planetary Health Diet, which derives approximately 87% of calories from plant sources. We further recommend that at least 25% of total food procurement be sourced from organic farming, in line with the EU's target of 25% of agricultural land under organic production. As we demonstrate below, the substantial budget savings generated by plant-forward menus create fiscal headroom to invest in organic sourcing without increasing overall procurement costs. Our analysis uses best-practice methodology, including the OECD's value-of-statistical-life methodology,⁷ and True Cost Pricing.⁸

Our full research methodology is detailed in the Technical Appendices.

We estimate that if EU public institutions allocated 85% of their food budgets towards plant-source foods, the EU would unlock roughly €11.61 billion per year in combined returns. The changes would generate returns of €215 per person served by these institutions. Conversely, €1.3 million in returns is missed per hour that the current system continues unchanged. In Germany alone, the shift would deliver €2.53 billion per year in combined returns. In France the returns reach €2.4 billion per year.

While sustainable procurement has many potential benefits, policies may struggle to see adoption or even face resistance if they increase food costs to budget-constrained institutions. Fortunately, plant-forward menus typically reduce food costs.



THE POTENTIAL OF PLANT-FORWARD PROCUREMENT FOR EVERY EU COUNTRY

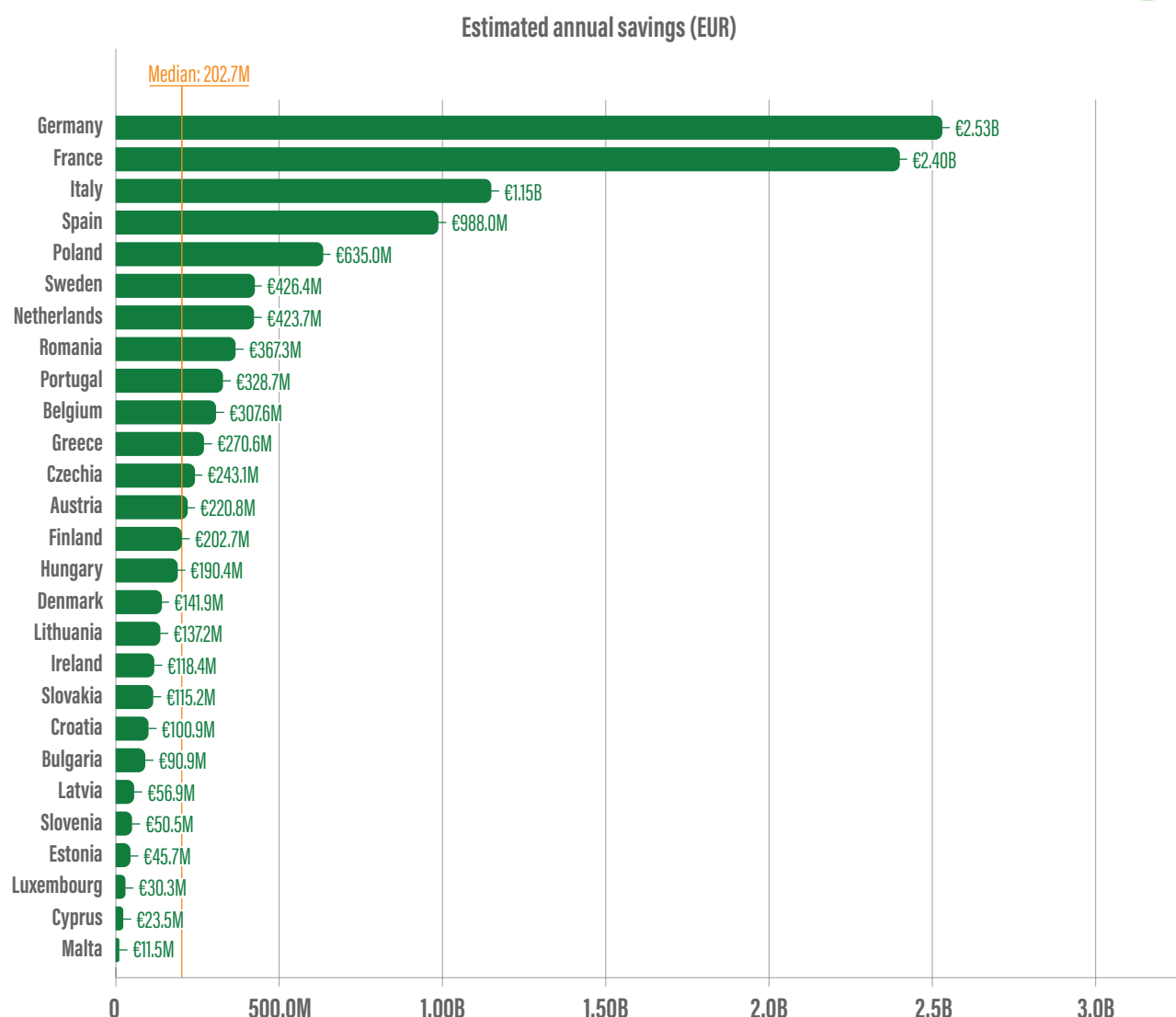


Figure 2: Total savings per EU country in an 85% plant-forward public food procurement budget scenario

Our evidence review found that fully plant-based diets and menus typically cost 25% less than those containing animal-source foods. This cost advantage translates to up to €3.16 billion per year in direct budget savings, enough to fund school meals for over 5 million children (see Technical Appendix 2) and provide ample fiscal headroom to invest in higher-quality organic sourcing. The environmental returns alone represent a reduction of 8.89 million tonnes of CO₂-equivalent per year, comparable

to removing approximately 4.44 million cars from European roads. Additionally, our analysis suggests rebalancing school diets from red and processed meat and towards plant protein and whole grains could result in 396,187 fewer adults developing obesity across the EU27 — more people than live in the city of Bologna.

Savings were modeled for each country in Europe.

PLANT-FORWARD FOOD PROCUREMENT ALIGNS WITH EU PRIORITIES

The four priority areas of the 2025 Vision

The Commission's Vision for Agriculture and Food is structured around four fundamental priority areas. Plant-forward food procurement serves each of them.

1. An attractive and predictable agri-food sector

A plant-forward shift creates new domestic demand for plant protein crops, opening income opportunities for EU legume and vegetable growers. The Vision calls for conditions that “allow the agri-food sector to leverage its entrepreneurial potential, supported by different income sources.” Institutional demand for plant proteins is precisely such an income source.

2. A competitive and resilient sector

Reducing dependence on imported feed crops and diversifying EU food production away from a limited number of soya-dependent livestock strengthens the sector's resilience against global shocks. According to the Commission's 2025–2035 Agricultural Outlook,⁹ the EU's domestic pulse sector is already on a healthy growth trajectory, with production growing at 0.8% per year, the highest growth rate projected for any protein or oilseed crop in the bloc. The EU Agricultural Outlook further projects that domestic pulse production will increasingly displace imports, with a 2.1% annual reduction in import reliance through 2035. Food procurement directives and policies that accelerate this transition directly serve the Vision's goal of “reducing critical dependencies” and enabling the sector to adapt and transform.

A plant-forward public food budget allocation would shift €11.61 billion in procurement spending according to our analysis, creating a massive, stable institutional

demand to meet the increasing supply of EU-grown legumes and vegetables. This would allow European farmers and producers to invest with confidence.

3. A future-proof sector functioning within planetary boundaries

Our analysis quantifies exactly what “functioning within planetary boundaries” costs under the status quo: €4.37 billion per year in environmental externalities from animal-source food consumption in public institutions alone (see Technical Appendix 3). Cutting these externalities ensures the sector retains its social licence under future climate and biodiversity pressures.

4. Valuing food, fostering fair living and working conditions in vibrant rural areas

Plant-forward food procurement directs new demand toward vegetable and legume growers, many of whom operate in rural economies where income diversification is most needed. The transition from basic commodity pulse production and animal feed to high-value-added ingredients for institutional catering creates economic opportunity. Existing Common Agricultural Policy (CAP) instruments (eco-schemes, rural development measures) provide vehicles for supporting this transition.

Food as a strategic sector: food security and supply chain resilience

The revision of the Public Procurement Directives offers an opportunity to recognise food as a strategic sector, rather than treating it as just another purchasing category.¹⁰



Framing food as a strategic sector is consistent with mainstream EU policy. The Strategic Dialogue states that “Food and agricultural production play a strategic role in the new geopolitical context as an essential part of European security,” and it also recommends a stronger EU framework for sustainable food procurement. The Commission’s 2025 Vision for Agriculture and Food carries this forward by committing to strengthen the role of public procurement, develop short supply chains, and address protein supply challenges. The Commission’s 2025 JRC SPP similarly treats food procurement as a cross-cutting policy tool that must account for environmental impacts, public health, social benefits, competitiveness, and innovation. This matters because the EU imports 19 million tonnes of crude protein and still greatly relies on imported soya bean and soya meal, while the ongoing revision of the Public Procurement Directives is explicitly framed

around economic security, self-sufficiency, resilience, and alignment with wider strategic objectives.^{11 12} In that context, plant-forward public food procurement should be understood not as a niche sustainability preference, but as a strategic demand-side tool for reducing critical dependencies and building a more resilient EU food system.

The Commission’s Vision acknowledges that the EU’s protein supply is “heavily reliant on high-quality imports from a limited number of origins, making our food system vulnerable to global market fluctuations and sustainability risks.” And as the Draghi report concluded, “dependencies are becoming vulnerabilities.”¹³ Europe does not have the farmland to support its meat consumption, and as a result, two thirds of the land required to produce food for the European diet is overseas.¹⁴ In particular, European pork and poultry are severely dependent on imported soya from South America, and if these supplies were threatened, production would be forced to drop significantly.¹⁵ Redirecting institutional demand toward domestically produced legumes, fruits and vegetables, and grains strengthens the EU’s strategic autonomy agenda by replacing external dependencies with a more resilient domestic supply.

Legumes in particular are land-efficient when produced for food and fix atmospheric nitrogen, reducing dependence on synthetic fertilisers. This is increasingly critical in light of the Carbon Border Adjustment Mechanism (CBAM) and the tariffs on Russian and Belarusian nitrogen fertilisers that will rise rapidly to 2028 (European Parliament, May 2025).^{16 17} Legumes’ natural nitrogen fixation provides a hedge against these escalating costs, bolstering both food security and national security.

The CAP and farmer support

The Commission’s CAP 2028–2034 proposals represent the most significant shift toward protein diversification in CAP history.¹⁸ For the first time, a dedicated protein crop sector has been created under the Common Market Organisation (Article 159), enabling producer organisations, marketing

standards, and origin labelling for EU-grown legumes.¹⁹ Coupled income support has been raised from 13% to 20–25% of direct payments with an explicit protein crop priority, representing a rebalancing of a system previously skewed 70% towards livestock and just 14% towards protein crops. New multi-annual transition support offers up to €200,000 per farm for moving to “more sustainable models.” Degressive payments and redistribution now prioritise diversified farms combining crops and livestock, with investment support up to €300,000 for processing infrastructure. These policies create strong incentives for livestock farmers to diversify production toward a variety of enterprises, including crops like legumes.^{20 21}

These are, collectively, strong supply-side instruments to incentivise on-farm diversification. But supply without demand is subsidy without purpose. Plant-forward food procurement is the demand-side engine that makes these instruments more effective, providing €11.61 billion in redirected institutional spending (see Technical Appendix 2) as a guaranteed market floor for EU protein crop growers. This ensures that farmers are incentivised by both the market and government for moving from unsustainable industrial animal agriculture towards sustainable diverse food production.

The timing is critical. CAP negotiations are underway in Council and Parliament, and Member States will draft National and Regional Partnership Plans in 2027 for implementation from January 2028.²² The proposed mid-term review (Articles 24–25, NRP)²³ creates a built-in mechanism to assess whether diversification is progressing and adjusting.

Simplicity of regulation and respecting diverse culinary traditions

According to the Vision Section 3.2, the Commission has committed to “an unprecedented simplification effort, including in agriculture.” As the Draghi report states, excessive requirements and reporting obligations impede EU competitiveness and innovation. This presents a dilemma: how can the EU encourage public

procurement that considers health, sustainability, diverse food culture, food security, and cost, while also minimising red tape and not stifling innovation?

Plant-forward food procurement is the flexible principle that can achieve this. Orientation towards plant-source foods brings both health benefits and multiple environmental benefits, such as climate, biodiversity, water, and air quality. It does this while remaining flexible enough that each Member State can comply without sacrificing culinary traditions. For example, when it comes to a staple like beans, Italy may prefer to serve rustic Ribollita, Bulgaria comforting Bob chorba, and Greece its classic Fasolada.

We recommend a simple budget allocation threshold of 65–85% spent on plant-source foods. This threshold is more practical to monitor and enforce than the current patchwork of voluntary Green Public Procurement (GPP) guidance²⁴ and fragmented criteria that exists across Member States. Contracting authorities have a single rule instead of working through multiple frameworks and criteria. Establishing this threshold as a single metric of success minimises administrative “paralysis by analysis” by replacing the current patchwork of competing sustainability labels with one clear, measurable, and verifiable threshold for compliance. Compliance can also easily be integrated into the existing Tenders Electronic Daily (TED) database: contracting authorities would simply report the proportion of plant-source food procurement in standard contract award notices, mirroring the reporting mechanism already used for zero-emission vehicles under the Clean Vehicles Directive.^{25 26}

The Clean Vehicles Directive (2019/1161) provides direct EU-level precedent. It sets aggregate percentage targets at Member State level for clean vehicle procurement, with flexibility for how effort is distributed across contracting authorities. A plant-forward food procurement target can mirror this framework: define the covered procurement scope (food, food services, vending), set an EU-level minimum plant-based share, require Member State monitoring and compliance mechanisms, and permit local flexibility in how targets are met across schools, hospitals, and other institution types.

“Best Value” procurement

Vision Section 3.4 says the Commission has committed to “a legal proposal to strengthen the role of public procurement” that pursues “a ‘best value’ approach to reward quality and sustainability efforts.” Our calculations for environmental (€4.37 billion, see Technical Appendix 3) and health (€4.08 billion, see Technical Appendix 4) costs are precisely the kind of externalities that “best value” procurement is designed to internalise. The environmental costs in particular are invisible in conventional procurement accounting: healthcare costs from air pollution, lost ecosystem services from land degradation, and economic consequences of climate change. A “best value” framework makes these costs visible and actionable.

It should be noted that the EU JRC already includes “plant-based menus” as a technical specification for catering services.²⁷ When environmental and health externalities are priced into procurement decisions through life-cycle costing (LCC), plant-forward tenders consistently outperform conventional alternatives. Our analysis provides the cost figures that make “best value” operational for food procurement.

One Health

Our choice to include potential environmental and social cost savings in our analysis takes inspiration from the conceptual framework of One Health.²⁸ One Health is an integrated, unifying approach that aims to sustainably balance and optimise the health of people, animals, and ecosystems. It recognises that these domains are inextricably linked: a shift in one inevitably resonates across the others.

The same dietary patterns that impose €4.37 billion per year in environmental externalities also impose €4.08 billion per year in social health costs and cardiovascular disease. These are not separate problems requiring separate solutions. Excessive agricultural pollution affects the air that Europeans breathe, the soil our crops grow in, and the biodiversity in our waterways. The IHME Global Burden of Disease 2023 study quantifies this burden across the EU27:

diets high in red meat account for approximately 69,900 deaths annually, while diets high in processed meat account for approximately 60,700 deaths annually, totalling over 130,000 preventable deaths per year. Plant-forward food procurement would impact both dimensions simultaneously.

The benefits also extend to the next generation. Our modelling estimates that reformed school meal systems could prevent approximately 396,187 cases of adult obesity across the EU27. Plant-forward menus achieve this by reducing caloric density and saturated fat while increasing dietary fibre – both of which are established risk factors for childhood obesity. According to the World Health Organization’s European Regional Obesity Report, almost 60% of adults and nearly 30% of children in the region now experience health challenges related to excess weight.²⁹ Balanced plant-forward school procurement can play a role in stemming this worsening health crisis.

The legislative window

The policy window for embedding plant-forward food procurement into EU law is open now. The Commission’s 2026 Work Programme is expected to deliver a “Public Procurement Act” as a legislative initiative under Article 114 TFEU (internal market) in 2026.^{30 31} The Commission has already launched a public consultation on procurement directive evaluation and revision³², which ran until January 2026. The 2025 Vision has committed to a legal proposal to strengthen the role of public procurement. The time is ripe for policymakers to push for plant-forward food procurement.

Moreover, over 130 organisations have called for an EU Action Plan for Plant-Based Foods by 2026.³³ The Commission’s own Vision commits to a comprehensive protein plan addressing both production and consumption. These converging initiatives create a legislative moment where mandatory plant-forward procurement targets can be advanced as part of a broader, politically supported reform agenda.

RECOMMENDATIONS

In this final section, we detail a diverse menu of recommendations that would incentivise Member States to implement plant-forward food procurement. We have structured this section in order of recommendations we believe would be most impactful.



1. AMEND THE EU PUBLIC PROCUREMENT DIRECTIVE:

Replace lowest-cost bidding with a sustainability-weighted evaluation framework that internalises environmental and health externalities, and introduce a minimum 25% organic sourcing target for public food procurement.



2. REFORM THE EU SCHOOL SCHEME:

Expand eligible food categories to include legumes and fortified unsweetened plant-based drinks, ensuring all children benefit from EU-funded nutrition.



3. UPSKILL THE CATERING WORKFORCE:

Direct ESF+ funding and a new micro-credentials framework towards training chefs to deliver nutritionally complete plant-forward menus.



4. SUPPORT FARMER DIVERSIFICATION:

Establish a dedicated grant fund and conditional supply contracts that de-risk the transition from feed crops to food-grade plant protein.



5. IMPLEMENT BEHAVIOURAL NUDGES:

Mandate plant-based defaults, strategic menu placement, and sensory-focused labelling in public catering to make the sustainable choice the easy choice.



1. Amendment of EU Directive 2014/24/EU on public procurement

The current application of **Article 67 of Directive 2014/24/EU** regarding the most economically advantageous tender (**MEAT**) criterion embeds the consideration of cost into the tender evaluation process. While this criterion is technically meant to balance price and quality considerations, in practice, it has resulted in 'lowest cost' often being the primary determinant of contracts. To ensure the revised directive encourages a more holistic approach to measuring the 'value' of contracts, we recommend the following changes:

Replace MEAT criterion with MAT criterion in Article 67.

Amend Article 67 to replace the MEAT criterion with the most advantageous tender (MAT) criterion for all contracts related to food and catering services. This will allow for buyers to consider non-economic objectives and public benefits when reviewing contracts, helping to align procurement with broader government objectives. The transition from MEAT to MAT is a proven strategy for stopping 'low-cost-only' bidding. Evidence from the UK's Procurement Act 2023 and Social Value Model provide proof of concept.^{34 35}

Redefine the "link to the subject matter" requirement.

The restrictive interpretation of the "link to the subject matter" significantly limits the implementation of sustainability criteria in food procurement. Redefine the "link to the subject matter" requirement so that it allows for the integration of environmental and social criteria. Guidance and legal protections should also be provided to facilitate the inclusion of these criteria by public authorities. This will ensure that tenders offering higher sustainability performance are rewarded.

Implement BPQ&S methodology for evaluations.

Introduce a new section in Article 67(1) mandating the Best Price– Quality and Sustainability (BPQ&S) methodology for contract evaluations.

Amend Article 67(2) to provide guidelines for BPQ&S weighting.

For all food-sector procurement, the weighting of award criteria shall be subject to the following requirements:

→ **Set a mandatory minimum for 'sustainability' criteria.** We recommend that 60% of the contract be allocated towards sustainability, in alignment with Article 18(2).

→ **Set a mandatory cap of 30% for the 'price' criterion** to ensure evaluations cannot disproportionately prioritise cost considerations.

Mandate life-cycle assessments through Article 68.

Update Article 68 to mandate standardised EU Food Life-Cycle Assessments (LCA). This builds upon Italy's CAM (Minimum Environmental Criteria) framework, which uses LCC/LCA metrics to award bonus points (reward scores) to bidders.³⁶ Unlike Italy's optional approach on LCCs, this amendment mandates the use of LCA as the scientific evidence base required to validate sustainability claims. To help ensure the practicality of this, the Commission should provide a common EU Food Impact Database based on verifiable scientific evidence. This may provide more stability for domestic organic farmers and small and medium-sized enterprises (SMEs) who could otherwise be cut out by larger suppliers. A Tiered Reporting Framework could allow micro-producers to use Default Verified Values, while larger operations provide detailed primary data. Organic and regenerative certifications could serve as proxies for high scores to minimise administrative burdens.

Update to include a 'comply-or-explain' clause.

Update the directive by adding a provision requiring contracting authorities that do not apply the BPQ&S Methodology, the 60% sustainability minimum, and/or the 30% price cap to publish a transparent public justification statement on why they bypassed the criteria. This allows for flexibility in genuine emergencies while also placing the burden of proof on Member States to explain deviation from EU strategic targets.

Introduce a 25% organic sourcing target through Article 44.

Source at least 25% of total public food procurement from organic farming practices, verified through organic certifications as provided for under **Article 44 of Directive 2014/24/EU**. This target directly supports the EU's ambition of reaching 25% of agricultural land under organic production by creating guaranteed institutional demand.³⁷ This would be a powerful market signal for farmers considering the transition to organic. The EU Green Public Procurement criteria for food and catering services already encourage organic sourcing³⁸; embedding a quantified target in the revised directive would convert this voluntary aspiration into measurable progress. Crucially, the budget savings generated by plant-forward food procurement (up to €3.16 billion per year under the 85% scenario) provide ample fiscal headroom to absorb the modest price premium typically associated with organic products. We recommend a phased-in approach beginning with product categories where the organic supply chain is most mature, such as fruit, vegetables, and legumes, before extending to other food groups.

2. Revision of the EU School Scheme (Regulation 1308/2013)

While well-positioned to be the cornerstone of European child health, the school scheme currently lacks the flexibility to cater to the diverse spectrum of dietary needs and intolerances and to address evolving sustainability benchmarks. To update the

scheme to be more inclusive and sustainable, we recommend the following amendments.

Reclassify pulses, legumes, and nuts as a Core Category in Article 23(3).

Amend Article 23(3) of Regulation (EU) No 1308/2013 to reclassify pulses, legumes, and nuts as a core distribution category in school food, granting them the same fiscal priority and distribution as fresh fruit and vegetables and aligning with the JRC's 2025 guidelines for mitigating diet-related diseases.³⁹ This shift also supports the EU Protein Strategy by promoting partnerships between schools and local plant-protein farmers.

Expand Article 23(3) to include fortified unsweetened plant-based milk alternatives.

The existing scheme restricts public funding to two categories: fruit and vegetables, and dairy. In doing so, it fails to deliver on the European Child Guarantee's purpose to provide access to nutrition for all children, including those who cannot consume dairy due to allergies, intolerances, or specific dietary needs.⁴⁰ We recommend amending Article 23(3) of Regulation (EU) No 1308/2013 to include unsweetened, fortified plant-based drinks (such as soya and pea) as an eligible core category. This ensures that children who cannot consume dairy are not excluded from EU-funded nutrition.



Recently, the Polish government has taken the lead on these issues.⁴¹ As a result of consultations with parents in 2025, schoolchildren will be served a legume-based dish at least once a week, with traditional soups to use vegetable broth rather than a meat base. Furthermore, plant-based milk alternatives are to be made available alongside dairy, allowing children the choice. Similarly, the German Nutrition Society (DGE), which is responsible for food-based dietary guidelines in Germany, acknowledges the role of fortified plant-based milk alternatives in a healthy diet.⁴²

3. Empowering and upskilling the catering workforce

The catering sector faces significant knowledge and skill gaps in sustainable plant-forward culinary practices. As such, the proposed procurement standards must be accompanied by robust support for caterers to deliver upon them. To unlock this potential, we recommend the following.

Recommend allocation of ESF+ funding to plant-forward culinary programmes.

The Commission should provide guidance to Member States to prioritise a portion of their ESF+ (European Social Fund Plus) allocations for the upskilling of the catering workforce. The ESF+ specifically earmarks funds (under its Secondary Theme 01) for promoting “green skills” and jobs that contribute to a low-carbon, sustainable economy. Training chefs and food service operators to implement delicious, nutritionally complete plant-forward menus would be a prime candidate for these funds.

Establish an EU framework for sustainable catering micro-credentials.

In alignment with the 2026 Quality Jobs Act, the Commission should develop a standardised EU framework for micro-credentials in sustainable catering based on the 2025 JRC SPP. Public procurement contracts awarded under the BPQ&S methodology could reward bidders who demonstrate a commitment to continuous staff development through the sustainable catering microcredentials.

4. Support for farming

To ensure procurement reforms support EU strategic independence, we must link public demand with domestic agricultural supply chains. Currently, CAP subsidies are heavily weighted toward livestock feed, leaving arable farmers who wish to grow

food-grade pulses and other plant-protein sources without adequate support. To align with the 2025 Vision for Agriculture and Food, the EU must de-risk diversification for farmers by providing guaranteed market outlets and targeted investment.

Use conditional supply contracts to de-risk farmer investment.

Leverage Article 39 (Joint Procurement) to establish long-term supply agreements between public institutions and producer organisations that diversify into plant-forward or sustainable farming practices. This would provide farmers with guaranteed markets for their crops, de-risking the investment of time and money into diversification.

Establish an EU plant-forward diversification grant fund.

Following the widely-popular model of Denmark’s Plant-Based Action Plan,⁴³ the Commission should establish a dedicated fund that supports diversification into sustainable plant-based food production. These grants could be used to fund new plant-processing facilities, providing low-interest loans for new equipment, upskilling and training programmes, as well as the R&D of climate-resilient crops.

5. Implementing nudges in public catering

The EU can encourage sustainable and healthy eating by using choice architecture and nudging in public institutions. These techniques use behavioural science to make the healthy, sustainable choice the easy choice, while preserving freedom to choose meals with animal-source foods. Nudging interventions in hospitals in several countries have been shown to significantly reduce carbon emissions and food costs, without reducing patient satisfaction.^{44 45} Nudging interventions are currently being trialled in hospitals across Europe (see Portugal⁴⁶ and Germany⁴⁷). We propose three evidence-backed policies:

Update Directive 2014/24/EU and the School Scheme (Regulation 1308/2013) to mandate 'plant-based by default' for all meals in schools and hospitals.

Despite being a mandate, this would preserve freedom of choice while leveraging the behavioural power of defaults to encourage healthy, sustainable eating.

Mandate strategic placement and linguistic nudges for plant-based options

In accordance with the 2025 JRC guidelines, plant-based meals must be placed at the primary focal point of menus and physical serving lines. These dishes should be described using appealing, sensory-focused language rather than restrictive or dietary labels.

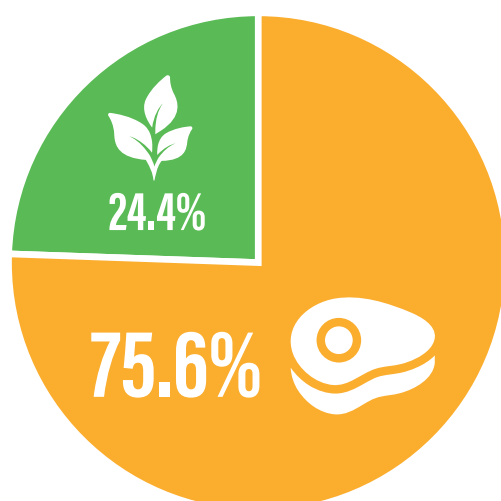
Inclusion of a 'comply-or-explain' clause for nudges

Update Directive 2014/24/EU to require contracting authorities that do not apply default nudges or placement strategies to publish a statement explaining why they did not adhere to the guidelines. This allows for flexibility in genuine emergencies, while also placing the burden of proof on Member States to explain deviation from EU strategic targets.

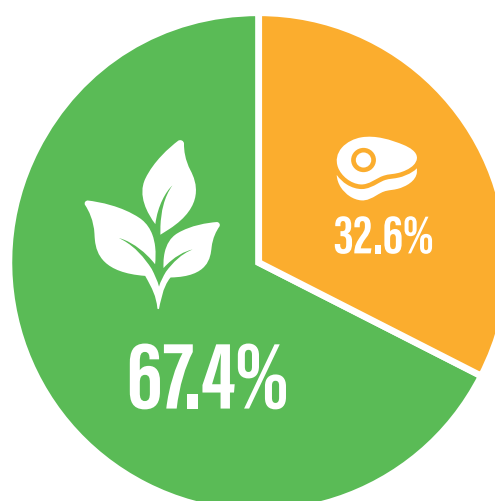
THE POWER OF PLANT-BASED DEFAULTS



Meal Selection: ● Selected Meat ● Selected Plant-Based



MEAT DEFAULT



PLANT-BASED DEFAULT

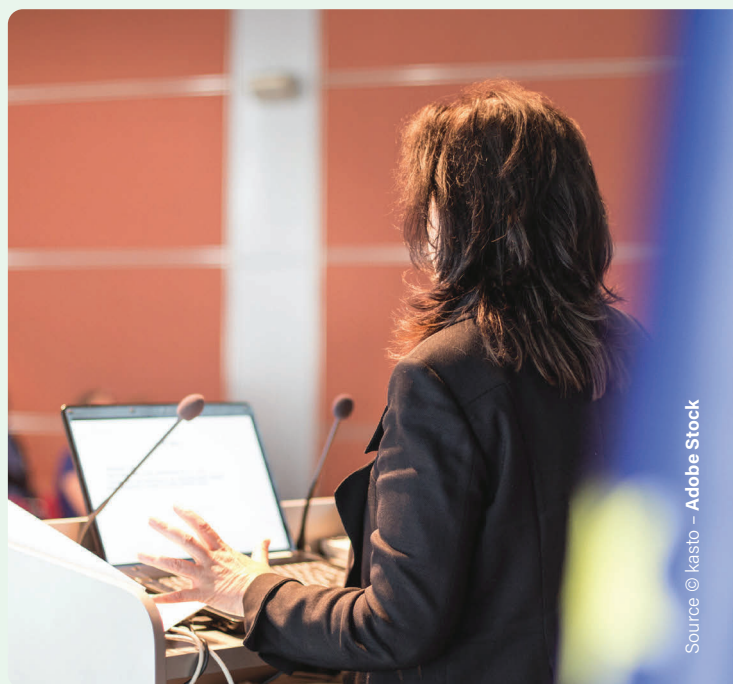
Figure 3: Results from Boronowsky et al. 2022⁴⁸ showing percentages of plant-based and meat meal selection among control (meat default) and intervention groups (plant-based default) at catered events on college campuses

CONCLUSION

The evidence presented in this report points to a single conclusion: plant-forward public food procurement delivers measurable returns across multiple dimensions that EU policymakers care about. Under an 85% plant-based budget allocation, the EU would save €3.16 billion per year in direct food costs, avoid €4.37 billion per year in environmental externalities, and prevent €4.08 billion per year in social health costs, for a combined €11.61 billion in annual savings.

To capture these savings, we have set out five policy recommendations: amending Directive 2014/24/EU to replace lowest-cost bidding with sustainability-weighted evaluation and introducing a 25% organic sourcing target; reforming the EU School Scheme to include legumes and fortified plant-based drinks; directing ESF+ funding toward upskilling the catering workforce; establishing a dedicated farmer diversification grant fund and conditional supply contracts for farmers transitioning to plant protein; and mandating behavioural nudges in public catering.

The legislative window is concrete and time-bound. The Commission's Public Procurement Act is expected in Q2 2026. CAP National and Regional Partnership



Plans will be drafted in 2027 for implementation from January 2028. Each year that these instruments proceed without plant-forward targets embedded is another €11.61 billion in unrealised returns: budget savings not captured, environmental damage not avoided, and health costs not prevented.

ENDNOTES

- [1.] We use 'plant-forward' to describe diets centred on fruits, vegetables, whole grains, legumes, nuts, and mushrooms, as well as plant-based alternatives to animal-source foods that are nutrient-rich and compatible with WHO guidelines on salt, sugar, and fat content.
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