

# SIAL

**INSPIRE FOOD BUSINESS**

The world's largest food  
innovation exhibition

**21-25 OCTOBER 2018**  
PARIS NORD VILLEPINTE - PARIS

PRESS PACK

LOOK DEEPER

**TAKE A TRIP AROUND  
THE PLANET FOOD  
OF TODAY AND TOMORROW**

SIALPARIS.COM

#SIALPARIS

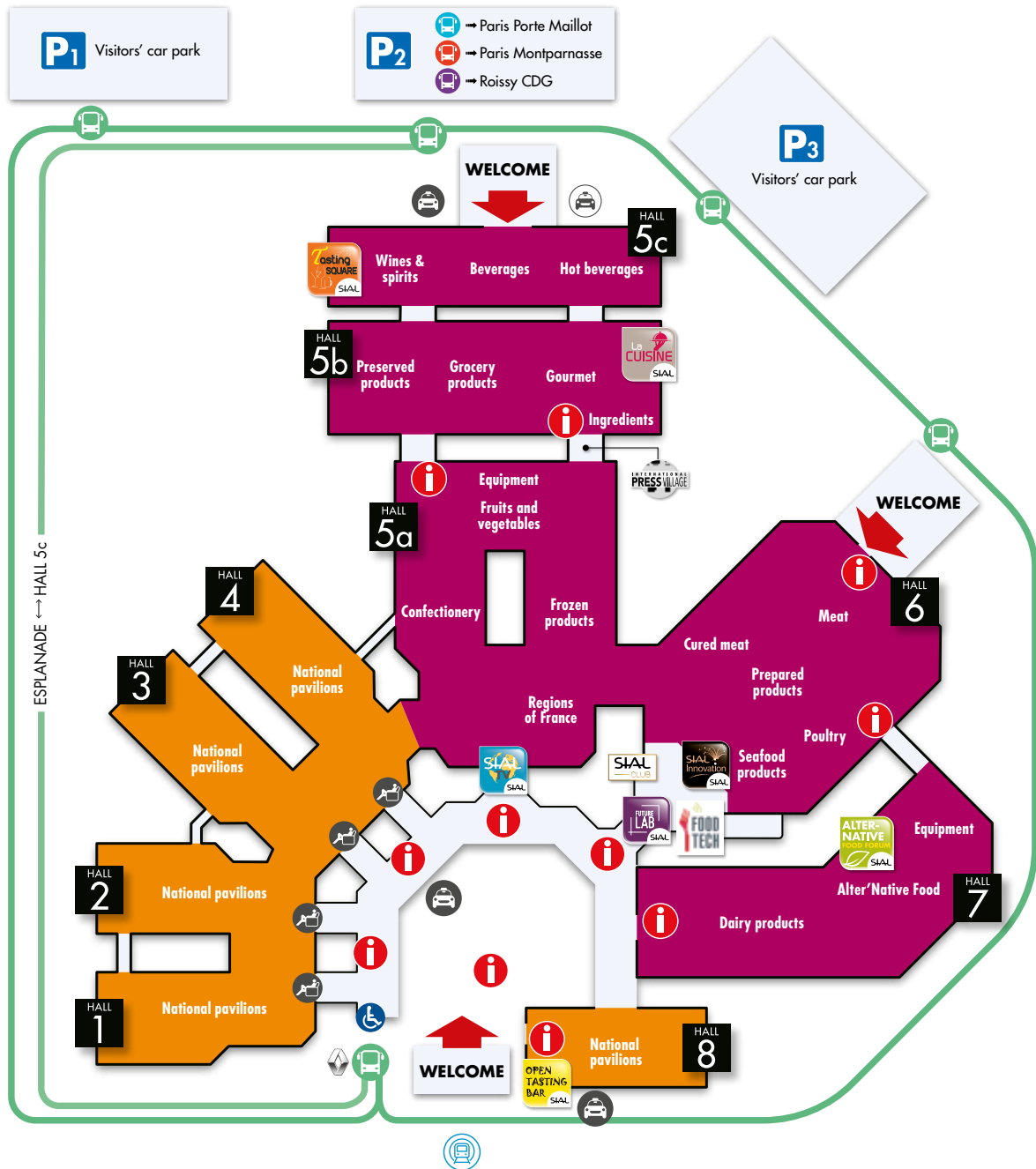


COMEXPOSIUM

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# SIAL PARIS AT A GLANCE



Information

Exhibition Free Shuttles  
Esplanade ← Parking  
 Show Shuttle

Taxi

RER B train terminal  
Parc des Expositions

Handicap welcome desk

Reserved vehicles  
Taxis, VTC, Motorbikes

Rest Area

Free Shuttles  
Paris / Aéroport Roissy CDG



21 PRODUCT SECTORS

#1

Beverages

#2

Cured meat

#3

Tinned foods

#4

Delicatessen

#5

Grocery

#6

Fruit and vegetables

#7

Organic products

#8

Seafood

#9

Health and food supplement products

#10

Dairy

#11

Frozen foods

#12

Sweet grocery and bakery

#13

Daily, ready-prepared dish

#14

Meat

#15

Wines and spirits

#16

Poultry and game

#17

National pavilions and world regions

#18

Regions of France

#19

IN-FOOD / PAI, Ingredient and subcontracting solutions

#20

Equipment, technology and services

#21

Pet food

# KEY FIGURES



**7,200** EXHIBITORS

FROM 119 COUNTRIES, 87% INTERNATIONAL

**125**  
OFFICIAL DELEGATIONS  
EXPECTED



**3** DAILY  
CONFERENCES

TO PRESENT THE RESULTS  
OF 2018 KANTAR TNS,  
XTC WORLD  
INNOVATION  
AND GIRA CONSEIL  
WORLDWIDE  
SURVEYS



250,000 m<sup>2</sup>

**10** HALLS



**160,000**



PROFESSIONALS  
EXPECTED

70% INTERNATIONAL  
FROM 194 COUNTRIES



**55%**

RETAIL / COMMERCE



**23%**

FOOD INDUSTRIALS



**16%**

FOOD SERVICE



**6%**

SERVICES

**9**

THEMED VISIT TOURS

**5** GUIDED VISITS

PER TOPIC WITH EXPERTS

**2,355**

IN COMPETITION FOR  
SIAL INNOVATION PRESENTED  
BY **1,193** COMPANIES



**801**

SELECTED PRODUCTS

**15** AWARDS



## EDITO

Nicolas TRENTESAUX  
SIAL Network Managing Director



SIAL PARIS 2018 INVITES  
YOU TO COME  
AND TAKE A DEEP  
BREATH OF INSPIRATION,  
AND TRY OUT SOME  
NEW EXPERIENCES!



# SIAL PARIS

## THE GREATEST SOURCE OF INSPIRATION AND INNOVATION IN THE FOOD SECTOR!



"Look deeper", as you know, is our international promise: our commitment to help businesses in the sector to better understand the market and the trends in the world food sector, so as to develop and sustain their competitiveness.

"7,200 of these businesses have taken this message on board, and will be waiting to present to you their know-how, their innovations and some 400,000 products hailing from more than 119 countries all around the world, to satisfy your need for inspiration."

SIAL Paris, truly a book of world trends, this year expects to receive 160,000 professionals, buyers, restaurateurs, industrialists and journalists in search of inspiration, exchanges and analysis so as to get a better handle on just what consumers expect, and in this way sustain and develop their - and your - competitiveness.

Come and discover, in particular, our selection of the latest innovations from the sector in the **SIAL Innovation** space, showcasing what is new and what is trending worldwide, this year alongside its predictive counterpart, the **Future Lab**: a space given over to the analysis of weak signals, rising start-ups and virtual reality applications. Once again you can enjoy the flagship events of SIAL Paris, including:

- **La Cuisine** where chefs from around the world will titillate your taste buds.
- **SIAL TV**: a programme of roundtables and interviews that will address the key issues in our sector and make it possible to discover practical case histories and the rising start-ups of the Future Lab.

### And new in 2018:

- **Tasting Square**: a unique space for trying out the beverages of SIAL's exhibitors,
- **Open Tasting Bar**: where the drinks of Latin America will be showcased from 10 am to 5 pm every day,
- **Alter'Native Food Forum**: at the heart of this new sector of the show - with its coverage of the organic, "free-from" products, products enriched with superfruits or super vegetables, natural energy drinks, and products respectful of animal welfare, among others - provides a forum for picking the brains of the experts and discovering what's new, and what the best practices are in production and distribution.

SIAL Paris 2018 invites you to come and take a deep breath of inspiration, and try out some new experiences!

This year, more than ever, Planet Food is committed to Taste - True - Meaning.

I hope you enjoy an excellent SIAL, packed with opportunities.



# A MADE-TO-MEASURE VISIT

## EXTRA VISITOR COMFORT

To encourage business, make sure everything runs smoothly, and ensure everyone gets the most out of their time at the show, SIAL Paris has set up the following "Welcome" programme.

### OPENING TIMES

The welcome gallery is open from 8.30am accessed from the RER exit and taxi stations.

The show is open:

- Sunday to Wednesday from 9.30am to 6pm.
  - Thursday from 9.30am to 5pm.
- Last entry is at 2pm.

### COMFORT & SECURITY: A SIAL PARIS PRIORITY

To welcome its visitors and exhibitors in the best conditions possible, SIAL Paris has reinforced its security measures:

- Obligatory passage through walk-through metal detectors at the show's entrance (with body checking if necessary).
- Visual inspection of all bags.
- Luggage larger than cabin bag-size must be checked in at the cloakroom.
- A telephone line dedicated to security.

### 1 AN APP TO PREPARE AND OPTIMISE THE VISIT

SIAL Paris app features everything you'll need for the show: available on Android, IOS and Windows Phone.

You will find:

- Practical information: getting there, opening times...
- A QR code reader for access to SIAL Innovation products in 3D.
- A list of exhibitors and their products.
- A calendar of events.
- An interactive map.
- Events push.
- Matchmaking platform.
- SIAL OFF: 50 gourmet addresses in Paris selected by Gault&Millau.

#### The matchmaking platform (on the app and computer)



The new matchmaking platform enables our visitors and exhibitors to discover interesting profiles suggested by artificial intelligence according to profile and expectations settings.

Access to the application is strictly for registered participants only. Connection with the same ID and login as for the show registration.

### 2 SINGLE ENTRANCES

To facilitate your visit, entrances and control points are centralised, offering direct access to the show from 8.30am (from the RER exits and taxi stations) once you've gone through security.

The advantages? Immediate access to the cloakrooms and coffee shop in the Welcome Gallery (Galerie d'accueil) and all the other halls without re-scanning your badge.

Entrances: RER exit/Hall 8/  
Hall 5C/Hall 6/ Taxi stations.

### 3 SIAL PARIS' VISITING TOOLS

To help visitors find the exhibitors they need, numerous tools have been put in place:

- **A visitor's guide:** available for free at the entrances, offering a list of exhibitors, a map, and practical information about the show and Paris.

- **A programme of events and conferences:** listing every event at the show.

- **9 specific themed tours have been designed to highlight the products offer** per theme including SIAL Innovation selected products: New businesses (less than two years old), Halal, Kosher, Alter'Native Food, Private labels, Made in France, Semi-finished Food Products & Equipments, Foodservice, Snacking and Gourmet Food, Beverages, Fresh and Frozen Products, Grocery products.

- **The official catalogue:** listing every exhibitor by product category, alphabetically and by country. Available at the show, and for purchase after the event at [www.sialparis.com](http://www.sialparis.com)

### 4 WORK & WELL-BEING

There is an open-to-all business area in the Welcome Gallery (Galerie d'accueil), opposite Hall 4, offering desk areas, computers and multiple business services (secretariat, printer, fax, photocopying...).

### AND

- 5 relaxation zones at the entrance of Halls 1, 2, 3, 4 and 6. With sockets for recharging, WiFi and a rest area.
- Free WiFi throughout.
- A concierge service in the Welcome Gallery between Halls 4 and 5.

### 5 GETTING AROUND

- Free shuttle buses to/from Porte Maillot, Montparnasse train station and CDG airport.
- Free shuttle buses within the exhibition centre.
- Inter-Halls shuttle made available by **our partner Renault**.
- Taxi stations: two taxi stations (reservations possible at [sialparis.g7booking.com/](http://sialparis.g7booking.com/)).
- An on-line travel service at [www.sialparis.com](http://www.sialparis.com)
- Reduced mobility access: the Parc des Expositions (exhibition centre) has disabled access in all of its halls. It is also possible to request reduced mobility shuttles from both the visitors' and exhibitors' car parks/call: +33 (0)6 14 16 93 84.

## NEW TOQUES EN TRUCK

### ESPLANADE

On Tuesday 23<sup>rd</sup>, from 12am to 2pm, take a lunch against Cancer!

Come and find the Food Truck by "Tout Le Monde Contre le Cancer" sponsored by Eurogerm.

**6 FOODSERVICE**  Reflecting the international nature of the exhibition, the food outlets on the site are designed to suit everyone, with a wide variety of catering concepts. 25 fast-food outlets and bars, 5 restaurants and 5 self-service outlets are available.

At SIAL Paris you can enjoy all kinds of cuisine, whatever takes your fancy:

- Italian food in Hall 1.
- Halal food between Halls 2 and 3 and between Halls 4 and 5A.
- Kosher food in Hall 5A.
- Meat dishes in Hall 6.
- Vegetarian options are proposed in most snack bars and restaurants.

• Food Markets propose 3 different types of cuisine in Halls 2, 3 and 6.

• Food Boxes: wide choice of fast food in Halls 1, 2 and 4.



**"STAR CHEF TAKE OUT"** an original concept that lets you take away your box of dishes, cooked by star chefs!

Note the time and the place:  
Hall 5B, from noon until 2pm daily.

### NEW:

**Le Central** restaurant welcomes you to lunch in Hall 5A (especially for visitors and exhibitors who previously booked their "Restaurant Welcome Pass" while ordering a badge). It includes a set menu for €55 and fast-track access.

Reservation [sialparis.com](http://sialparis.com)

## OUR OBJECTIVES IN 2018



**-20%**  
LESS WASTE  
BY VOLUME



**+20%**  
GREATER WASTE  
RECYCLING RATE



RECYCLING OF STAND  
MATERIALS

# SIAL PARIS, AGAINST WASTE!

## THE PLANET FOOD COMMITMENT!

### HOW CAN SIAL PARIS SUCCEED?

- Sorting and recycling stand waste. 
- Collecting cigarette butts.  
- Making available to exhibitors a reuse platform for recycling booths materials.
- Elimination of plastics (drinking straws are no longer available at any of the foodservice points).

### And continuing with...

- Recycling organic waste, used cooking oils.
- Collecting food donations.

**TO PROTECT OUR FOOD PLANET:  
RECYCLING AND DONATING  
IN 2018!**

croix-rouge française



### COLLECTING FOOD DONATIONS

To avoid wasting food and encourage contacts between charities and exhibiting companies, SIAL Paris is this year partner to the Red Cross.

Every two years, SIAL Paris offers an exceptional opportunity for establishing and developing long-term partnerships. **Perishable food left at the exhibition is taken to French Red Cross distribution centres.**

These products are immediately given to the most disadvantaged. In 2016, a record 65 tons of food was recorded, representing 70,000 meals.

Allo à l'huile   
SARIA Group

Bionerval   
SARIA Group

In partnership with the Saria Industries brands **ALLO À L'HUILE** and **BIONERVAL**, SIAL Paris will recycle its organic waste and cooking oils. These will be reconverted into energy and fertilisers at the group's industrial site in Etampes.

On each day of the show, exhibitors' biowaste will be collected, selectively sorted and stored in appropriate containers.



# LANDMARKS

## TOP 5 SECTORS

1. DAIRY PRODUCTS, EGGS
2. MEAT AND FRESH TRIPE
3. SWEET AND DESERTS, FINE BAKERY WARES
4. FROZEN FOODS, ICES AND ICE-CREAMS
5. GOURMET FOOD AND MULTI-PRODUCTS

## TOP 10 INDIVIDUAL EXHIBITORS

1. GROUPE BIGARD (FRANCE)
2. SAVENCIA (FRANCE)
3. DÖHLER GMBH (GERMANY)
4. FRIESLANDCAMPINA (NETHERLANDS)
5. PINI ITALIA SRL (ITALY)
6. LACTALIS INTERNATIONAL (FRANCE)
7. ADM WILD (GERMANY)
8. VANDRIER GROUP (NETHERLANDS)
9. SALUMIFICIO FRATELLI BERETTA SPA (ITALY)
10. ABP GROUP (IRELAND)

## NEW COUNTRIES IN 2018

1. BAHREIN
2. BARBADOS
3. BELIZE
4. ICELAND
5. JAMAICA
6. KAZAKHSTAN
7. KYRGYZSTAN
8. MOZAMBIQUE
9. UZBEKISTAN
10. SYRIAN ARAB REPUBLIC
11. SAINT-VINCENT AND THE GRENADINES
12. SAMOA
13. TAJIKISTAN
14. TRINIDAD-&-TOBAGO

## TOP 10 NATIONAL PAVILIONS

1. TURKEY
2. SPAIN
3. BRAZIL
4. ITALY
5. USA
6. GREECE
7. GERMANY
8. MOROCCO
9. CHINA
10. INDIA

## TOP 10 EXHIBITING COUNTRIES IN 2018

1. FRANCE
2. ITALY
3. SPAIN
4. TURKEY
5. NETHERLANDS
6. CHINA
7. GREECE
8. BELGIUM
9. GERMANY
10. POLAND

## FOCUS ON FRANCE

ALL FRENCH REGIONS PRESENT, INCLUDING FRENCH OVERSEAS TERRITORIES

**1,000**  
FRENCH EXHIBITORS

FRANCE AS THE LEADING EXHIBITOR COUNTRY





# EVENTS WITHIN THE EVENT



LOOK DEEPER

# A VOYAGE AROUND PLANET FOOD IN "AUGMENTED REALITY", WITHOUT LEAVING PARIS!



## DISCOVER THE PLANET FOOD OF A NOT-SO-DISTANT FUTURE, WITH FUTURE LAB

This year, SIAL Paris wanted to look deeper, beyond innovation. Or rather: before it. Innovation at its birthing. Invention: or when ideas are still only at the gestation stage. Future Lab: the laboratory of Planet Food! The new nerve centre of the event, which perfectly complements SIAL Innovation. It is a space divided into 3 zones:

### #SIALFoodLab

An immersive room for addressing the topics that will become central to our food concerns in a not-too-distant future, analysed by **Alim'Avenir**.

### #SIALVRLab

Comprising 4 virtual reality applications, this space offers a futuristic voyage into the food sector, for understanding how this technology will revolutionise our daily diets: in the restaurant, at work, in stores, or quite simply in the home.

The space was designed in partnership with **Easycom**.

### #SIALRisingStartup

A space enabling **40 or so budding European businesses** to take part in SIAL Paris. A real springboard for rising start-ups that are looking to take flight!

This space has been created in collaboration with **IDEFI-ECOTROPHELIA** and **AgroParisTech**.

### #SIALFUTURELAB ENTRANCE TO HALL 6

#### FOCUS #SIALRISING STARTUP:

These budding new companies will be present for one day in the Future Lab, and will give a pitch on SIAL TV the day they are there.

- List of companies present per day on **sialparis.com**



### NEW IN 2018

**3 DAILY CONFERENCES**   
ABOUT THE RESULTS OF KANTAR TNS, XTC WORLD INNOVATION AND GIRA CONSEIL WORLDWIDE SURVEYS

Booking on:  
[www.sialparis.com/Visiting/Services-for-your-visit/Attend-the-conferences-conducted-by-our-experts](http://www.sialparis.com/Visiting/Services-for-your-visit/Attend-the-conferences-conducted-by-our-experts)

# AND EXPLORING FOOD INNOVATION

What could be better, for taking a deep breath of inspiration, than strolling through the aisles of SIAL Paris to discover new ideas? A flagship event of SIAL Paris, the **SIAL Innovation Observatory** unveils the most innovative food products, equipment & services proposed by the exhibitors, along with the results of the studies by our experts: Kantar TNS, XTC World Innovation and Gira Conseil. The most promising of these innovations will receive a much-coveted SIAL Innovation Award and trophy.



## SIAL INNOVATION WINNERS

The SIAL Innovation Observatory showcases the 15 top prizes per category, selected by our jury of experts from the 2,355 products presented by the exhibitors, along with more than 250 products from the selection.

**New in 2018:** the space includes touchscreens on which visitors can access the results of the global studies conducted by our experts, KANTAR TNS, XTC world innovation and GIRA Conseil. Visitors can also receive these results by email having made a prior selection.



## SIAL INNOVATION 2017-2018 WINNERS FROM ACROSS THE SIAL NETWORK

The **World Champions Tour** area allows visitors to discover in a single place all the innovations discovered around the world of SIAL shows, with the products awarded SIAL Innovation prizes in 2017 and 2018, throughout the network.

## THE "SOFIS"

Don't miss the winners of the latest edition of the "Specialty Food" awards! The sofi awards honour the best US products, bestowed by Specialty Food annually.

Discover the sofi prizewinners in the SIAL Innovation Observatory, at the entrance to Hall 6.

## HIGHLIGHTS

### SUNDAY, OCTOBER 21 AT 4:30PM:

inauguration speech by the minister of Agriculture and agri-food (SIAL TV entrance Hall 5A)

### SUNDAY, OCTOBER 21 FROM 5 TO 7PM:

France Happy Hour (Welcome Gallery)

### MONDAY, OCTOBER 22 AT 3PM:

FoodTech Tour @ Future Lab (entrance to Hall 6)

### MONDAY, OCTOBER 22 AT 5PM:

SIAL Innovation award ceremony (Hall 6)



## New in 2018:

FoodTech presents the innovations for the entire "Made in France" value chain for French food. Come and meet some 20 start-ups in the FoodTech space.

A "French Tech" themed network, FoodTech is an ecosystem that brings together entrepreneurs, industrial players, researchers & scientists, training bodies and public organisations,

at the crossroads of digital technology and the agricultural, agri-food, food retail, and consumer goods channels.

With its partners - INRA, Les Mousquetaires, Groupe SEB and Orange - FoodTech offers start-ups across the value chain, from production to consumption, the opportunity to showcase their innovative projects for the French and international visitors.

## FOODTECH TOUR MONDAY OCTOBER 22<sup>ND</sup>



- 2:30pm: ECOTROPHELIA Europe - Mezzanine - Hall 4

Winners announced by Mr. Bertrand Edmond, President of the Jury - Campden BRI UK, and awards ceremony

- 3pm: cocktail @ SIAL RISING START-UPS (entrance to Hall 6)

Welcome by Philippe Mauguin, INRA President and President of the jury selecting SIAL Rising start-ups.

- 3:20pm: visit of the ECOTROPHELIA Europe display presenting 17 prizewinning products

Welcome by Dominique Ladevèze, President of Innovation Research CCI Vaucluse.

- 3:45pm: FoodTech area visit

Welcome by Xavier Boidevezy, FoodTech General secretary Digital Factory vice-president of Group SEB and Philippe Mauguin, INRA President.

- 4:30pm: Food Tech Europe study result - SIAL TV (entrance to Hall 5A)

Mr. Jean-René Buisson, SOPEXA president, will present the results of the first survey conducted by DigitalFoodLab and its partners Sopexa, Vitagora, Eutopia and CCI Paris Ile-de-France.

- 5pm: SIAL Innovation 2018 award ceremony - Hall 6 entrance

Award ceremony presented by Nicolas Trentesaux, Managing Director of SIAL network and Xavier Terlet, XTC world innovation president.



# ALTER'NATIVE FOOD, A SPECIAL PLACE

ALTER'NATIVE FOOD: this will be a show within the show, which will have its own signposting, its own forum, in a quite simply unique environment!  
When SIAL Paris highlights the Alternative Food sector, it is with a specific sector and its own event.



## ALTER'NATIVE FOOD FORUM

Over the 5 days of the exhibition, retail and foodservice professionals, along with manufacturers, will be able to exchange with each other and find out about everything that Alternative Food has to offer them, in terms of both innovation and opportunity, by way of conferences and roundtables. The Alter'Native Food Forum is also planned to include bilingual guided visits to the sector from two perspectives: alternative ingredients (conducted by experts from **NutriMarketing**) and health (conducted by experts from **Atlantic Santé**).



## SOME OF THE TOPICS TO BE ADDRESSED...

**Sunday 21 October:**  
"Changing consumer expectations for Organic", conference by Ein Herz für Bio

Over the years, the organic agriculture channel has gained popular ground, and it is now possible to find many organic products in different distribution networks: mass retail, specialist stores, local producers, etc. What are the benefits (environmental, health, animal welfare, etc.) of an organic agriculture and diet? How do we address the growing demand for organic products? What are the objectives of the new strict specifications established in the framework of European regulations?

**Monday 22 October:**  
"Regulations: Transparency, Blockchain and Quality Labels" by Emmanuel Audoin, Bureau Veritas

Consumers expect greater transparency from manufacturers. They want to know the source of products and of the ingredients going into them, but they also want to know how, under what conditions and by whom the product was made.

To reassure consumers, manufacturers turn to quality labels and deploy blockchains to guarantee the traceability of their products.

**Tuesday 23 October:**  
"Food for Seniors: Eating well to age well" with Dr Nicole Vidal, Silver Fourchette Tour and Virginie Van Wymelbeke, Dijon CHU hospital

Over the past 60 years, men and women alike have gained 14 years of life expectancy on average. This increased longevity is not always synonymous with a good state of health. Yet the quality of our diets, throughout our lifetimes, has a major influence both in staving off diseases for younger seniors and for meeting the specific needs of the elderly, as well as preventing the frequent phenomenon of malnutrition. How do we adopt a diet that combines pleasure and a nutritional role for senior citizens and the elderly? How do we eat to age well?

**Wednesday 24 October:**  
"New sensory experiences" with the participation of the Paul Bocuse Institute

Driven by curiosity, 45% of the world's consumers like to try out new flavours. The trend is therefore toward new sensory experiences, with the mixing of tastes, flavours, colours and textures. It is time to take inspiration from other countries, other markets, other cultures: all tastes are allowed!

**Thursday 25 October:**  
"Transformation of the distribution channels" with the participation of Gilles Raison, JustEat

With ever more demanding consumer expectations in terms of time and efficiency gains, the distribution channels need to adapt. Drive-ins, box-delivery subscriptions, food to-go and home deliveries: what are the new product distribution modes?

The full programme of conferences, roundtables and guided visits is available from [sialparis.com](http://sialparis.com) and via the app.

# SIAL PARIS

## WHERE GASTRONOMY FINDS INSPIRATION!

SIAL Paris is the biggest restaurant in the world, a gourmet restaurant at that, with no borders, with multiple traditions and recipes, where professionals can find inspiration from around the world in just one place: Paris! But talk is cheap, and actions speak louder than words!



HALL 5B



**7,200**

EXHIBITORS  
1/3 WITH THEIR OWN  
SPECIFIC FOODSERVICE



VISITOR THEME TRAIL  
DEDICATED  
TO FOODSERVICE  
AND PREPARED  
BY YANNICK ALLÉNO



**160,000**

PROFESSIONALS  
OVER 5 DAYS,  
18% FROM  
FOODSERVICE



So, not least thanks to the partnership with **Yannick Alléno**, in 2018 at SIAL Paris visitors can enjoy successful features, such as:

- a **VIP restaurant** run by famous starred chefs, showing off their innovations.

- **Daily demonstrations** from French and international chefs.
- **Star chef take-out:** the daily meals cooked up by the star chefs will be on sale to-go.
- **The SIAL OFF guide**, in partnership with Gault&Millau, featuring 50 restaurants and foodservice professionals offering a unique experience in Paris (available on SIAL website and mobile app).
- **A dedicated visitor** theme trail prepared by Yannick Alléno.

**NEW IN 2018**  
for even more  
inspiration, every  
morning at La Cuisine  
professionals will be able  
to take cooking lessons  
with renowned chefs.



Traditions and know-how, innovations and the future: it is from a unique combination of know-how and a whirlwind of creative inspiration that the foodservice world and SIAL Paris take mutual inspiration, to take centre stage and fashion a mouth-watering event.

### THE CHEFS AT LA CUISINE FROM 21 TO 25 OCTOBER 2018

- Nicolas Sale: VIP Restaurant
- Sébastien Sanjou: VIP Restaurant
- Matthieu Garrel: VIP Restaurant
- Thierry Vaissière: VIP Restaurant
- Mickaël Pihours: VIP Restaurant
- Thierry Dufroux: VIP Restaurant, live cooking
- Romain Gicquel: VIP Restaurant, live cooking
- Clément Bidard: VIP Restaurant, live cooking
- Benjamin Lechevallier: VIP Restaurant, live cooking
- Johan Leclerre: VIP Restaurant, cooking lesson
- Rachid Souid: Live cooking
- Lucas Felzine: Live cooking
- Xavier Zabaleta: Live cooking
- Philippe Geneletti: Live cooking
- Frédéric Jaunault: Live cooking
- Dina Nikolaou: Live cooking, cooking lesson
- Fabien Borgel: Live cooking, cooking lesson
- Romain Le Cordroch: Live cooking, cooking lesson
- Mehdi Abdelhakim: Cooking lesson, live cooking



# SIAL PARIS LOOK DEEPER



## HALL 5A ENTRANCE

You're interested in discussing and finding out about the big issues in the world agri-food industry? Come along to the SIAL TV set, where you can attend and take part in roundtables, interviews and pitches from budding young businesses selected for Future Lab rising start-ups, to find inspiration and spark new ideas into life. A true platform of expression for debating and discovering the big issues: sustainable development, producer/distributor relations, food, nutrition-health-wellness, the sourcing of raw materials, the new modes of consumption and food behavior in France and worldwide.

Overall program at [www.sialparis.com](http://www.sialparis.com)



Created in partnership with Gault & Millau, **the SIAL OFF guide** divulges the best addresses in Paris, to choose between 50 establishments hand-picked by SIAL Paris and Gault & Millau.



## HALL 5C

**New in 2018** at SIAL Paris, the Tasting Square invites stakeholders in the Beverages sector to offer their best products for tasting by the SIAL visitors against a unique backdrop, where discovery and conviviality are the order of the day.



## Hall 8

SIAL Paris celebrates Latin America, with its Open Bar situated in Hall 8. From 10 am to 5 pm come and try out different local beverages, from coffee to beer through fruit juices (one beverage offered per person, per day). *\*Alcohol abuse is a health hazard, consume in moderation.*



## BETWEEN HALL 5A AND HALL 5B

This space gives access to around 100 professional press publications dedicated to retail, foodservice and the agri-food industries.



France also has a central role in SIAL Paris. The proof is in the regions which, as in 2016, are highlighted under a common banner: "Made in France, Made with Love". This year, more than 1,000 companies will present their products to the public under this banner. And, to present French conviviality, a giant aperitif will be organized by the French visibility partners: France **HAPPY HOUR**, for all visitors and exhibitors, on October 21<sup>st</sup> from 5 to 7pm in the main gallery.



# **SPOTLIGHT ON THE SIAL INNOVATION 2018 AWARDS**



LOOK DEEPER

# SIAL INNOVATION AWARDS

## AS INSPIRATIONAL AS EVER

With a **10%** rise in the number of new products presented for the SIAL Innovation Awards, there is no stemming the flow of agri-food innovations, whether targeting manufacturers, retailers or, of course, consumers. Worldwide, the agri-food industry is striving to adapt to the appetites of a new generation hankering for fresher, healthier food, by developing new products and new ingredients that will soon be making their way to the store shelves and the dining table.

**2,355**  
VALIDATED PRODUCTS  
presented by  
1193 companies

**3**  
CATEGORIES



**11**  
PRODUCT SECTORS



**2**  
PURCHASER TARGET SECTORS



**2**  
INTERMEDIATE PRODUCTS & INGREDIENTS AND E&T\* SECTORS

more than  
**800**  
SELECTED PRODUCTS,  
INCLUDING 174  
FOODSERVICE

**15**  
AWARD WINNERS

\*Specialised jury - not Food Grand Jury

**This edition of SIAL 2018 will mark the big comeback of taste. Or rather, tastes: tastes that are new and powerful, to bring new "pleasure experiences" to consumers. Also - and above all: natural tastes. "True", authentic products, playing the transparency card so as to reassure consumers who are increasingly conscious of food risks. These are innovations that carry meaning: for yourself, for others, for the planet!**

With **2,355** entries for the Awards, this 2018 edition testifies once again to the vitality and boldness of the companies concerned. Following a first selection conducted by XTC world innovation, **801** finalists were short-listed in 3 categories: product sectors, purchaser target sectors, and Intermediate Products & Ingredients and E&T sectors.

### THE INNOVATION SCOUTS ARE

Yannick Alléno  
Star chef

Olivier Gourmelon  
Foodservice consultant, KingsofKitchen

Olivier Moulin,  
Blogger: "Papa en Cuisine"  
("Dad in the Kitchen")

Isabelle Martinet  
Journalist

Giannina Cohen Aubier  
Associate Director, VFC RP

Pascale Grelot-Girard  
Market Intelligence Director  
Kantar TNS

Jean-Pierre Clément  
Fauchon

Jean-François Aubry  
Journalist

Antoine Carroz  
Lafayette Gourmet

Sophie Labbe  
Utopies

Bruno David  
Intermarché

Benoît Landier  
Intermarché

Florencia Pagano  
ILACAD- XTC Latin America

Isabelle Marquis  
XTC North America

Marc Frassenge  
Ouhlala - XTC China

Xavier Terlet  
CEO, XTC world innovation

Anne Cathy de Taevernier  
Elior

Franck Tesson  
Gault & Millau

Anne-Florence Sattonnay  
Disney

Junghoon Moon  
Food Biz Lab, South Korea

Nicolas Trentesaux  
Managing Director of SIAL Network

Adeline Vancauwelaert  
Deputy Director, F&B Division





# SELECTION STAGES

Providing inspirational insight and analysis into the latest innovations and world trends, the SIAL Innovation Awards reward food products, equipment & services for their promising and particularly innovative ideas. Organised by SIAL Paris, this competition is eagerly anticipated by the SIAL exhibitors, and winning a trophy serves as a springboard for the prize-winning companies, offering them a high level of exposure to both the public and investors, not to mention the many contact opportunities.



## PRODUCT REGISTRATIONS 2,355 PRODUCTS



## SIAL INNOVATION SELECTION MORE THAN 800 SELECTED PRODUCTS, INCLUDING 174 FOODSERVICE



### SIAL INNOVATION AWARD CATEGORIES

Non-alcoholic  
Drinks  
Awards

Alcoholic  
Drinks  
Awards

Dairy  
Product  
Awards

Savoury  
Awards

Sweet  
Awards

Delicatessen  
Awards

Fruit  
& Vegetables  
Awards

Seafood  
Awards

Frozen  
Foods Awards

Meat  
Awards

Alter'Native  
Food  
Awards



### AWARDS BY TARGET BUYERS

Distribution  
Awards

Foodservice  
Awards

Intermarché  
Le Monde  
du Surgelé  
Disney  
Lafayette  
Gourmet  
XTC  
SIAL

Yannick Alléno  
Kings of kitchen  
Fauchon  
Elior  
Gault & Millau  
XTC  
SIAL



### INTERMEDIATE FOOD AND E&T

In-Food  
Intermediate  
Food  
Awards

Equipment  
&  
Technologies  
Awards

## AWARDS

The Gold, Silver  
and Bronze Award  
winners will be revealed  
on **22 October 2018**  
in **Hall 6 at 5 PM**



# INNOVATIONS FROM THE WORLD OVER

Focus on the SIAL Innovation 2018 Awards, for which the **15 prizewinning** entries were selected on 20 September by a jury of experts. They will be on show in the Innovation Space at SIAL Paris from 21 to 25 October 2018.



## AWARDS CATEGORIES

### ALTERNATIVE FOOD

**Product description**

Vegan water kefir with fruits.  
Gluten and dairy free. 100% natural.

**Brand**

PAPADOPOULOS IORDANIS / NAMASTE

**Variety**

Water kefir ginger flavor,  
water kefir peppermint flavor.

**Manufacturer**

KEFIR NAMASTE

**Country**

Greece

**Launch date**

01/2017

Selected for the new proposal of water and fruit kefir.



### NON-ALCOHOLIC DRINKS

**GIVE IT A SHOT**

**Product description**

Functional drink shot.

**Brand**

SO NATURAL

**Variety**

Ginger, turmeric and cayenne,  
activated charcoal.

**Manufacturer**

GL SA

**Country**

Portugal

**Launch date**

05/2018

Selected for the packaging in shot format and the functional properties associated with the ingredients (activated charcoal, ginger and turmeric).



### ALCOHOLIC DRINKS

**TAGGIASCO EXTRAVIRGIN**

**Product description**

Italian gin distilled with juniper and taggiasca olives.  
Distilled under vacuum at low temperature.  
44% alcohol by volume.

**Brand**

EXTRA SRL - OLIO ROI

**Manufacturer**

OLIO ROI

**Country**

Italy

**Launch date**

02/2018

Selected for the new taste brought by the original olive-based recipe.



### DAIRY PRODUCT

**BURROTTA**

**Product description**

Burrata with ricotta center.  
Buffalo milk from Apulia.

**Brand**

MO' BUFALA

**Manufacturer**

MO' BUFALA

**Country**

Italy

**Launch date**

06/2017

Selected for the buffalo milk burrata recipe with ricotta center.





## AWARDS CATEGORIES

### SAVOURY

#### MORE THAN RICE

**Product description**

Rice grain-shaped pulses. High protein. Vegan. Gluten-free. Ready in 9 minutes.

**Brand**

PEDON S.P.A.

**Variety**

Riced lentils, chickpeas and peas / Riced peas and lentils / Riced chickpeas and lentils.

**Manufacturer**

PEDON S.P.A.

**Country**

Italy

**Launch date**

07/2018

Selected for the proposal of pulses shaped like grains of rice.



### SWEET

#### KIMCHI JAM

**Product description**

Jam with fermented ingredients: kimchi et soybean paste.

**Brand**

MIWAMI CO.,LTD. / LIGARO

**Variety**

Kimchi and soybean paste.

**Manufacturer**

MIWAMI CO.,LTD

**Country**

Korea

**Launch date**

03/2018

Selected for the recipe of kimchi jam and soya paste jam.



### FRUIT & VEGETABLES

#### BEKIDS

**Product description**

Freeze-dried fruit popsicle stick-to-go for children. No added sugar. In a pouch with a fun design.

**Brand**

BETTERS INTERNATIONAL

**Variety**

Watermelon, mango, amazonian pineapple, banana.

**Manufacturer**

BETTERS INTERNATIONAL SARL

**Country**

USA

**Launch date**

11/2018

Selected for the convenient offer of freeze-dried fruits for children.



### DELICATESSEN

#### ALLIOLI À L'AIL NOIR MORTIER 70 ML

**Product description**

Aioli sauce with black garlic. Fresh product. Gluten-free. Colorant-free.

**Brand**

CHOVI

**Manufacturer**

COMPTOIR FRANCE-ESPAGNE

**Country**

France

**Launch date**

10/2018

Selected for the original use of black garlic.





## AWARDS CATEGORIES

### SEAFOOD

#### ESTURGEON

on fillets with extra-virgin olive oil.  
Rich in Omega 3. BPA-free packaging.

**Brand**

EL CAPRICO

**Manufacturer**

SANTANDER FINE FOOD

**Country**

Spain

**Launch date**

03/2018



Selected for the new offer of sturgeon fillets in extra-virgin olive oil.

### FROZEN FOODS

#### PESTICIDE FREE FROZEN VEGETABLES IN PAPER-BASED BAG

**Product description**

Frozen vegetables from ecosustainable chain in a biodegradable paper bag. Pesticide residual free. Agricultural techniques with low environmental impact on air, land and water.

**Brand**

INDUSTRIE ROLLI ALIMENTARI SPA

**Variety**

Very fine peas, very fine green beans, minestrone, sliced courgettes, cauliflower florets, spinach leaves, broccoli florets, mixed grilled vegetables, artichoke hearts, IQF spinach, grilled aubergines.

**Manufacturer**

ROLLI

**Country**

Italy

**Launch date**

01/2019

Selected for the eco-sustainability of the production and the packaging.



### MEAT

#### 2 CUISSES DE LAPIN LES ÉLEVEURS RESPONSABLES

**Product description**

Rabbit cuts from responsible farms. French rabbit. Raised in large pens. Fed without GMOs. From the Bleu-Blanc-Coeur branch.

**Brand**

LOEUL ET PIRIOT

**Manufacturer**

LOEUL ET PIRIOT

**Country**

France

**Launch date**

09/2017

Selected for the quality of the product and the ethical and responsible character of the branch.





## AWARDS BY TARGET BUYERS



### FOODSERVICE

#### AIL NOIR DU NORD

**Product description**

Black garlic grown in northern France.  
100%-natural origin.

**Brand**

POTDEVIN - CARON

**Manufacturer**

COMITÉ DE PROMOTION NPDC

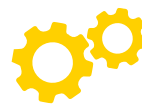
**Country**

France

**Launch date**

06/2018

Selected for the proposal of black garlic of French origin.



## INTERMEDIATE FOOD & E&T AWARDS



### EQUIPMENT & TECHNOLOGIES

#### SUPER DALI

**Application domains**

Ready-made meals, preserves, delicatessen products, fruit & vegetables, soft drinks, liquids, milk, dairy products, ice-cream, other.

**Product description**

Super Dali is a device in which the enclosed load in the autoclave is shaken approximated 45 times a minute. It is a device situated between the standard Dali (10-15 cpm) and the Shaka (150 cpm). It mixes packaged products (liquid, semi-viscous).

**Manufacturer**

STERIFLOW SAS

**Launch date**

10/2018

Selected for the research work done on an industrial machine. Progress made in sterilisation work to avoid over-cooking.

### DISTRIBUTION

#### NAMASTE WATER KEFIR WATER KEFIR

**Product description**

Vegan water kefir with fruits. Gluten and dairy free.  
100% natural.

**Brand**

PAPADOPOULOS IORDANIS / NAMASTE

**Variety**

Water kefir ginger flavor,  
water kefir peppermint flavor.

**Manufacturer**

KEFIR NAMASTE

**Country**

Greece

**Launch date**

01/2017

Selected for the new proposal of water and fruit kefir.



### PAI & INGRÉDIENTS

#### OLIVE SEED FLOUR

**Product description**

Olive seeds flour, rich in proteins, fibers and omega 3.

**Brand**

ELAYO

**Manufacturer**

ELAYO

**Country**

Spain

**Launch date**

10/2018



Selected for new flour, naturally rich in proteins, fibers and omega 3, as well as for the oil products valorisation.



**TASTE, TRUE, MEANING...  
THE PLANET FOOD  
COMMITMENT!**



LOOK DEEPER

# SIAL PARIS,

## THE PLANET FOOD LABORATORY

Since 2012, SIAL has been exploring and unveiling consumer portraits and food trends worldwide. The 2018 edition of SIAL Paris provides the opportunity to present the 4<sup>th</sup> part of the new and exclusive “Food 360<sup>o</sup>™” study carried out by KANTAR TNS in association with the Future Food book of trends from XTC world innovation, complemented by the out-of-home foodservice trends study from GIRA Conseil.

An analysis of the broad outlines of current and future trends on Planet Food, illustrated by a selection of the innovations presented by the exhibitors at SIAL Paris 2018.

### THE EXPERTS

**KANTAR TNS**



**Pascale Grelot-Girard, Market Intelligence Director at Kantar TNS,** has been supporting SIAL since 2012 in the production of a consumer study, Food 360<sup>o</sup>™, on the food consumption trends around the world.

This 2018 study\*, premiered exclusively in this press pack, draws up an inventory of consumer expectations, particularly with regard to food innovation.

**XTC**  
world innovation



**Xavier Terlet, founder and CEO of XTC world innovation,** has supported SIAL in the creation of SIAL Innovation, in Paris, as well as with the other SIAL hubs in Shanghai, Montreal/Toronto, Abu Dhabi and Jakarta.

For each edition of SIAL, XTC selects and inspects the innovations presented by the exhibitors and produces a trends book on what is on offer at the show. This 2018 version, packed with innovations and original concepts, is presented to you exclusively, for the first time, here.

conseil  
**GIRA**



**Bernard Boutboul, CEO of GIRA Conseil,** this year complements the SIAL studies with a quantitative and qualitative study of foodservice trends around the world.

His consultancy supports out-of-home food consumption stakeholders with their reflections and action plans.

\* KANTAR TNS Food 360<sup>o</sup>™ Edition 2018 carried out online on nationally representative samples in France, Spain, Germany, Great Britain and the USA; Russia: cities of over 100 000 inhabitants; China: Tier 1/2/3 cities; South-East Asian countries: urban areas of Indonesia and Malaysia; Middle Eastern countries: urban zones of the UAE, Bahrain, Oman, Qatar and Saudi Arabia. Depending on the country, samples of ± 500 individuals aged 18 and over or 18-55 years, representative of quotas in terms of gender, age, region and socio-economic criteria. Interviews conducted online from 6 March to 10 April 2018.



# 1 TASTE



LOOK DEEPER





# TASTE MAKES ITS BIG COMEBACK

We had kind of lost sight of it. It was still there, on our plates, but seemingly packing less flavour and strength than in the past. Well, now it's back, with a bang, as explained by our three Consumption, Industry and Foodservice experts, who are also great connoisseurs of taste. Three different points of view, to get a clearer picture of this great resurgence of taste right across Planet Food.

A joint interview, to rediscover the path to flavours at the table - at all tables, and to tune into the spirit of the age.



## 66%

**OF CONSUMERS** said that they pay more and more attention to choosing high-quality products



## 62%

**OF CONSUMERS** like to discover new products

### FIRST QUESTION TO GET THE BALL ROLLING: HAD TASTE REALLY DISAPPEARED FROM CIRCULATION?

#### Pascale Grelot-Girard:

«Not at all, consumers have always been attached to it! But the degree of attachment varies over space and time. What's more, depending on the period and the culinary tradition, taste for the consumer is not always a matter of the same flavours and the same virtues!»

#### Xavier Terlet: «I agree.

The value of taste is relative to each time, place and, of course, individual. What is more, tastes evolve. Today, we are witnessing a true return of strong tastes to satisfy the desires for new sensations expressed by consumers. Yet this extra taste must not be at the expense of the natural virtues of the product.»

**P.G.G.:** «I agree, but this time something has really changed: consumer expectations, in terms of taste, seem significantly more pronounced and, I'd go so far as to say, more sophisticated than before.»

**Bernard Boutboul:** «In terms of foodservice, we have made the same observation: taste had lost its force and intensity - I would also add its originality - on our plates. Today it is making its way back in force in most of the developed world!»

### WHY SUCH AN ATTACHMENT TO TASTE?

### WHAT ARE THE EXPECTATIONS UNDERLYING THIS ENTHUSIASM? AND WHAT INNOVATIONS ARE ADDRESSING IT?

**P.G.G.:** «To understand and measure this attachment, you first of all need to know that taste is being asserted as an essential criterion of choice for consumers, who increasingly associate «food» with «pleasure». I'm going to quote you a very eloquent statistic: in 2018, 66% of consumers said that they pay more and more attention to choosing high-quality products, for pleasure's sake! Indeed, in most countries - and more particularly in Europe - food is above all associated with the notion of pleasure. Pleasure procured through quality and taste, but also through discovery: 62% of consumers like to discover new products, with scores fairly similar across the different countries that we have studied.»

**X.T.:** «These results don't come as a surprise to me, because this attachment of consumers to taste is also related to a need for renewal, something that the agri-food industry has perfectly understood and anticipated, by permanently creating new culinary pleasures. Familiarity breeds contempt, as the saying goes. All around the world, artisans and industrial manufacturers alike are seeking to outdo each other with innovations for underpinning basic and raw pleasure, for rediscovering taste that is natural and true: taste, pure and simple. Pure and simple taste means, first and foremost, the product. It's about preserving flavours and taste quality. It's about the original taste. With nothing else added.»

Among the innovations expressing this trend - a trend that grows ever stronger - we find for example products whose ingredients have been stripped down to the bare minimum. Short and simple lists of ingredients to preserve the original taste of the product. This return to the "taste" value of products is indicated by new claims such as "real taste" or "intense taste", that can be found increasingly in the on-pack promotion.»



BONNE MAMAN  
"Intense Taste" Jam



TASTE IS BEING ASSERTED AS AN ESSENTIAL CRITERION OF CHOICE FOR CONSUMERS, WHO INCREASINGLY ASSOCIATE "FOOD" WITH "PLEASURE"



Pascale Grelot-Girard





“  
CONSUMERS WANT  
TO REDISCOVER  
AT HOME  
THE SENSATIONS  
THAT THEY  
SO APPRECIATED  
IN THE RESTAURANT  
”

Xavier Terlet

**B.B.:** «In foodservice, too, it is the notion of pleasure that is central! What could be better than enjoying quality cuisine and spending quality time with your family, your loved one or your friends in that temple of conviviality that a restaurant should always represent! This notion of pleasure involves above all the reassertion of taste and the discovery of new tastes. Ethnic food, before making inroads in the agri-food industry, first made its appearance in the foodservice sector, with the emergence of a multitude of establishments proposing exotic cuisine. First came Italian, then Chinese and Japanese, as well as Vietnamese. Right now it is Korean food that is making inroads on nearly every continent. Today, in all the world's major capitals, practically every cuisine on the globe is represented. It is a phenomenon that is, all told, fairly recent - several dozen years in being at most - and which is continually expanding.»

**XAVIER TERLET,  
DO THE AGRI-FOOD  
MANUFACTURERS OFTEN  
TAKE INSPIRATION FROM  
FOODSERVICE FOR THEIR  
INNOVATIONS?**

**X.T.:** «What Bernard Boutboul is saying is quite true. Consumers want to rediscover at home the sensations that they so appreciated in the restaurant. These recipes, initially known only in their countries of origin, offer a whole new world of tastes to consumers.»

Manufacturers are therefore exploring this world in the search for exotic pleasures, and consumers, keen to discover new things, are willing takers! Let's take the example of yoghurts. On the supermarket shelves there is a far more eclectic choice than before. Today you can find new recipes such as lassi (India), skyr (Iceland), kefir (Central Europe) and Laban (Lebanon): a form of exploratory pleasure that goes beyond the pleasure of taste! »



FARMY DAIRY  
Skyr yoghurt to drink

**IS EXOTICISM ONLY  
ABOUT THE PRODUCT  
AND ITS INGREDIENTS?**

**X.T.:** «Not exclusively. How people consume is also changing. An example of this is the current success of the poké bowl, a Hawaiian tradition that is becoming popular throughout the Western world. Manufacturers have picked up on the idea and now propose vegetarian versions with vegetables and fruits, but also with meat, eggs and cheese. It offers a mix of pleasure, taste and colour; healthiness and convenience.»



FARMER LAND  
Fruit "bowl", smoothie, coco milk

**B.B.:** «And what the manufacturers are good at - really good at - is this: having been the "nursery" of these new trends, restaurants see these new exotic products coming back at them, completely reinvented. It's a kind of virtuous cycle. I'm thinking, for example, of kombucha, the fermented beverage of Korean origin, which has been given a second lease of life thanks to a multitude of innovations around its taste and flavours, such that many establishments - even non-Korean ones - are now proposing it on their menus.»

**X.T.:** «Yes, you can find more and more Kombucha products in restaurants and on store shelves. Some examples will be on show, moreover, at SIAL!»



CAPTAIN  
Kombucha Drink

**P.G.G.:** «It is true that, as consumers, we are witnessing at the moment a particularly enthusiastic buzz around food innovation, catering to this hunger and thirst for food discoveries - as we discussed at the start of our interview - and which places pleasure and eating well at the heart of our expectations. It is no coincidence therefore that consumers should increasingly perceive food as a pleasure: a sentiment that has grown by 16 points in Spain, 10 points in Germany and 7 points in the Middle East and China in the space of 6 years!»





In 6 years,  
consumers increasingly  
perceive food as a  
**PLEASURE**

**+16 POINTS**  
in Spain

**+10 POINTS**  
in Germany

**+7 POINTS**  
in the Middle East  
and China



**AS FAR AS CONSUMERS ARE CONCERNED, DOES THIS TASTE FOR EXOTICISM AND FOR PRODUCTS THAT ARE MAYBE MORE NATURAL TIE IN WITH EXPECTATIONS IN TERMS OF “EATING WELL”?**

**P.G.G.:** «Absolutely! What’s more, if we were to summarise the way that consumers perceive their food today, around the world, it would be through this association of ideas: finding pleasure, yes, but in eating well! So what’s it about? Just what does “eating well” mean precisely? For the consumer, “eating well” is based on four pillars: eating healthily, having a balanced diet, taking pleasure in eating, and consuming quality products. While Asiatic, American and Spanish consumers pay more attention to the “healthy eating” pillar and to the notion of “balanced diet”, the dimensions of “pleasure” and the taste for quality or delicious products take precedence in France and Germany. As you can see, the perception of taste, pleasure and eating well varies from one country to another, and this certainly requires extra efforts and new commitments on the part of agri-food professionals.»



“EATING WELL” IS NOWADAYS INVARIABLY CONSIDERED SYNONYMOUS WITH “NATURAL AND BALANCED”



Xavier Terlet

**JUST HOW IS “EATING WELL” TAKEN INTO ACCOUNT BY THE AGRI-FOOD INDUSTRY?**

**X.T.:** «“Eating well” is nowadays invariably considered synonymous with “natural and balanced”, whereby “natural” suggests the guarantee of safe, risk-free food. Manufacturers therefore increasingly promote this natural taste. Choice natural taste ingredients such as ginger or truffle. No artificial flavour-enhancing ingredients or undesirable ingredients. Manufacturing processes to add taste while remaining natural and reassuring, such as infusion for all kinds of products, maturing for meat or cheese, and fermentation for vegetables, chilled products or ready meals. So it’s about providing a taste promise by means of a natural process. In other words, the added taste must be neither artificial nor questionable, but must rather both seduce consumers while giving them peace of mind.»

**FROM WHAT YOU’RE SAYING, THIS VOGUE FOR “EATING WELL” TENDS TO APPLY MORE TO NICHE PRODUCTS...**

**X.T.:** «Not at all! All product categories and all times of consumption are concerned by this trend, including snacking. This year’s SIAL, indeed, marks the advent of “healthy snacking”. Some examples? Balanced salads with natural ingredients, low-fat cereal bars, cold drinks rich in antioxidants, etc. The healthy snacking section is taking up more and more shelf space in retail outlets worldwide.»



MACCHU PICCHU  
Cereals and seeds bars



HEARTLAND  
Organic fruit concentrated juices  
to help kids drink water



LES INFUSÉES  
Oil of infused grape seeds



SALMÛRIA  
Strong seasoning of anchovy's  
maturation





FOR  
**66%**

**OF FRENCH PEOPLE,  
"EATING WELL"**

is synonymous with eating quality products!

offering certainly addresses the expectations of consumers who are keen to eat healthily and have a balanced diet. Yet in a country like France, with very firmly established gastronomic traditions, expectations are far higher in terms of pleasure, quality and flavours, as our study reveals. Therefore, for 66% of French people, "Eating well" is synonymous with eating quality products. »

**X.T.:** « This no doubt helps explain the upmarket trend that we are witnessing in France and many other countries. The taste of products is getting enhanced, ennobled, refined! In concrete terms, this trend relates to recipes that are more elaborate, sometimes with the addition of a single ingredient whose taste changes everything, such as olive oil or potato crisps with truffle, or cheese with saffron, sardines in premium olive oil, etc. All families of products are concerned, even - and above all - the most basic. Here we are facing what I would call a veritable "premiumisation of the everyday". »



TARTUFI  
Crunchy nuts flavored with truffle



SAFFRON CREAM  
Saffron cream

**IS THIS  
"PREMIUMISATION",  
REFERRED TO BY XAVIER  
TERLET, ALSO AFFECTING  
FOOD SERVICE?**

**B.B.:** « Absolutely! To get back to taste, since this is what we're talking about, restaurateurs strive more and more to magnify it, even if this means simplifying things, proposing fewer dishes in order to put the emphasis on an offering that may be less extensive but of better quality. There is, moreover, a global trend to reduce and simplify menus. Another illustration of this "premiumisation" is the success of "bistronomy". A contraction of "bistro" and "gastronomy", this foodservice model places the emphasis on simplicity and pleasure. It is a phenomenon that emerged in countries with strong gastronomic traditions, such as France, Italy and China, and which is now making an impact all around the world. It began with Michelin-starred restaurants setting up establishments that were smaller and more intimate, with pared-down menus, open kitchens, more informal service and more competitive prices, targeting consumers who are in a rush and who are looking for some peace and quiet and gastronomic pleasures at affordable prices. Today, thanks to bistronomy, the restaurant has become demystified, while returning to what has always been the strength of the sector: giving pleasure to the consumer. »

**DOES THE FUTURE  
OF TASTE RESIDE IN  
THIS "PREMIUMISATION"?**

**P.G.G.:** « It is just one of the facets of this taste resurgence. And I know that Bernard Boutboul and Xavier Terlet agree with me on this! Taste can have any flavour, aspect or intensity: ultimately, this is not what counts, but rather the commitment - and I stress this word "commitment" - of the food industry professionals to "taste" that is synonymous with "pleasure" and "eating well". »



THIS DIFFERENT  
SNACKING  
OFFERING CERTAINLY  
ADDRESSES  
THE EXPECTATIONS  
OF CONSUMERS



Pascale Grelot-Girard

**2 TRUE**



LOOK DEEPER



# WELCOME TO THE AGE OF "TRUE" FOOD

What does "true food" mean? This refers to food that is more authentic, more natural, healthier, and also safer. Consumers are paying more and more attention to what they eat, and the need for transparency and commitment has never been so strong. True food is a real trend right now. And it seems to be unstoppable. Discover Planet Food for true food...



Worldwide,  
**9 CONSUMERS  
IN 10** express the need  
for transparency about food  
products

## EUROPE / CHINA

Products innovation: never has the  
vegetal been subject to such a frenzy  
of innovation, **in particular  
in Europe and China**

## EUROPE / RUSSIA

**59%** of those polled  
need **transparency  
about the composition  
of products and list  
of ingredients**

## USA

**79%**  
of consumers express  
the desire for  
**more transparency  
about food  
products**

## CALIFORNIA

Food service: **California  
is leading the way,**  
with the emergence of a "healthy  
pleasure" foodservice offering

## CHINA / SOUTHEAST ASIA

**66%**  
of Chinese consumers  
and  
**78%** of the citizens  
of Southeast Asia **eat  
organic** whenever  
they can

## MIDDLE EAST

**77%**  
of consumers prefer  
**100% natural  
products** to better  
appreciate the taste



For manufacturers,  
**organic is growing  
worldwide**



Worldwide, Foodservice  
is **harking back to  
the home-made, "true"  
home-made**



# PLANET FOOD FOR TRUE FOOD FOR CONSUMERS



## 📍 EUROPE / RUSSIA

In Europe and in Russia, the need for transparency principally concerns the composition of products, the list of ingredients, the origins of products and also - specifically for Russia - the conditions of storage and food safety (for 59% of those polled).

Another important lesson is that just over 4 in 10 consumers in France and Germany express the need for transparency about the conditions of production and farming.

This desire for transparency also impels consumers to regularly scrutinise the composition of products or the nutritional information (a practice that has gained 7 points in 2 years in France, and which is peaking in Russia, with 74% of the interviewees responding in the affirmative!).

All these expectations presuppose commitment on the part of all stakeholders in the food industry! In parallel, the organic channel - traditionally associated with a healthier and more natural diet - continues to gain ground. When they are able to do so, just under 50% of European consumers are increasingly inclined to choose organic products, even if a year-on-year slowdown has been noted in the United Kingdom, and in Germany to a lesser extent.

## 📍 CHINA / SOUTHEAST ASIA

Asiatic consumers - perhaps more than elsewhere - expect greater transparency, mainly in the composition and origin of products for consumers in Southeast Asia, and in food

safety and storage conditions for Chinese consumers.

To be noted also is a need for transparency concerning the production and farming conditions as expressed by just over 4 in 10 consumers in Southeast Asia.

Another key fact is that the Chinese and the citizens of Southeast Asia accord ever greater importance to quality labels (61% and 72% respectively).

Furthermore, it is in these two zones that the interest in organic seems to be highest since, in 2018, 66% of Chinese consumers and 78% of the citizens of Southeast Asia said that they eat organic whenever they can. It's a real craze!

## 📍 USA

The need for transparency seems less pronounced on this side of the Atlantic, with 79% of US consumers expressing the desire for more transparency about food products (the global average being 92%).

This transparency mainly relates to the composition of products and the list of ingredients (for 50% of the persons polled) but also to food safety (43%).

That said, US consumers pay considerably less attention than elsewhere to the origin of the products that they buy or to the presence or absence of quality labels. However, 51% of them prefer to consume 100%-natural products with no artificial colours and no preservatives, to better appreciate the taste: a trend up 9 points compared to 2016! The naturalness of products seems to be an ever more important issue. With regard to organic, consumer interest seems to be plateauing since,

in 2018, 35% of consumers say they eat organic whenever possible, compared to 36% in 2016. This is one of the lowest scores in the countries studied, and lessons may be there to be learnt by the professionals.

## 📍 MIDDLE EAST

92% of Middle East consumers want more transparency for food products (matching the global average). This transparency mainly concerns the composition of products and the list of ingredients (for 68% of the persons polled).

Consumers in the Middle East are also looking increasingly to buy products at least bearing a quality label: this is the case for 51% of those polled.

Naturalness is another important criterion, with 77% of the consumers in this region of the world preferring to eat 100%-natural products to better appreciate the taste (up 10 points on 2014).

This all means that organic products are very popular in the Middle East, with 66% of consumers saying they eat organic whenever possible: a trend that has been rising sharply since 2012!



### CONSUMERS EXPECT GREATER TRANSPARENCY

A need expressed unequivocally, with **92%** of consumers - all countries combined - wishing for greater transparency about food products.

### ON THE SOURCING OF PRODUCTS

Globally, **64%** of consumers are increasingly attentive to the sourcing of the products that they buy.



## BEHAVIOUR AND EXPECTATIONS OF CONSUMERS AROUND THE WORLD

From one corner of Planet Food to the next, consumer behavior can differ, as can their constraints and expectations.

How do they approach innovation?

For SIAL, KANTAR TNS has compiled 8 worldwide consumer profiles to help us understand, respond and get inspired to innovate.



### Germany

FO&D 360 | KANTAR TNS

#### Taste



**59%**  
Are paying more and more attention to choose high quality food products

##### TOP 7 EATING WELL IS...

74%	Enjoying your food	54%	Eating a balanced diet
59%	Varying your meals	54%	Eating very tasty food
56%	Healthy eating	48%	Eating good quality food
		45%	A time to enjoy with family or friends

#### Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 89%** More respectful of animals well-being
- 83%** With less packaging or overwrapping
- 69%** With biodegradable packaging



#### True

**91%** Need more transparency regarding food products

##### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 50%** Ingredient list/composition
- 48%** Farming/breeding conditions
- 47%** Ingredients origins
- 41%** Food safety
- 40%** Manufacturing locations

#### Planet Food commitment

TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 50%** Consumer associations
- 50%** Small agro-food companies
- 41%** Farmers / breeders
- 31%** Trades / shopkeepers
- 30%** Consumers

**90%**

FIND IMPORTANT TO REDUCE FOOD WASTE



### Southeast Asia

Indonesia / Malaysia

FO&D 360 | KANTAR TNS

#### Taste



**71%**  
Are paying more and more attention to choose high quality food products

##### TOP 5 EATING WELL IS...

76%	Healthy eating	33%	Varying your meals
73%	Eating a balanced diet	29%	Enjoying your food
61%	Eating good quality food		

#### Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 88%** With biodegradable packaging
- 82%** More respectful of animals well-being
- 82%** With less packaging or overwrapping



#### True

**99%** Need more transparency regarding food products

##### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 61%** Ingredient list/composition
- 55%** Ingredients origins
- 43%** Storage conditions
- 41%** Farming/breeding conditions
- 39%** Manufacturing locations

#### Planet Food commitment

TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 57%** Medical professionals
- 51%** The Government
- 42%** Public authorities
- 40%** Consumer associations
- 30%** Farmers / breeders

**94%**

FIND IMPORTANT TO REDUCE FOOD WASTE







# Spain



FOOD 360

KANTAR TNS

## Taste



### 74%

Are paying more and more attention to choose high quality food products

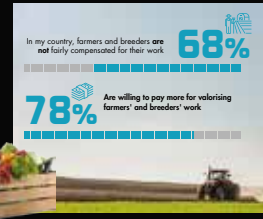
### TOP 7 EATING WELL IS...

60%	Enjoying your food
70%	Healthy eating
48%	Varying your meals
68%	Eating a balanced diet
40%	A time to enjoy with family or friends
63%	Eating good quality food
31%	Eating very tasty food

## Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 85%** More respectful of animals well-being
- 78%** With less packaging or overwrapping
- 78%** With biodegradable packaging



## True

### 96%

Need more transparency regarding food products

### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 55%** Ingredient list/composition
- 54%** Ingredients origins
- 52%** Food safety
- 50%** Manufacturing process
- 43%** How ingredients affect your health

## Planet Food commitment

### 97%

FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 51%** Consumer associations
- 48%** Consumers
- 41%** Public authorities
- 38%** Medical professionals
- 30%** Farmers / breeders



# China



FOOD 360

KANTAR TNS

## Taste



### 74%

Are paying more and more attention to choose high quality food products

### TOP 7 EATING WELL IS...

50%	Eating gourmet food
61%	Healthy eating
46%	Eating good quality food
55%	Varying your meals
43%	Enjoying your food
52%	Eating a balanced diet
40%	Eating very tasty food

## Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 84%** With biodegradable packaging
- 83%** More respectful of animals well-being
- 83%** With less packaging or overwrapping



## True

### 98%

Need more transparency regarding food products

### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 45%** Food safety
- 45%** Storage conditions
- 43%** Ingredients origins
- 40%** Manufacturing process
- 35%** Manufacturing locations

## Planet Food commitment

### 92%

FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 46%** Public authorities
- 43%** Large agro-food companies
- 38%** Consumer associations
- 33%** The Government
- 29%** Retailers





# United States



FOOD 360

KANTAR TNS

## Taste



**59%** Are paying more and more attention to choose high quality food products

### TOP 5 EATING WELL IS...

- 69% Healthy eating
- 66% Eating a balanced diet
- 63% Eating good quality food
- 52% Enjoying your food
- 37% Eating very tasty food

## Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 71% More respectful of animals well-being
- 67% With less packaging or overwrapping
- 59% With biodegradable packaging



## True

**79%** Need more transparency regarding food products

### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 50% Ingredient list/composition
- 43% Food safety
- 35% Ingredients origins
- 30% How ingredients affect your health
- 29% Manufacturing process

## Planet Food commitment

**85%** FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 43% Farmers / breeders
- 37% Consumer associations
- 32% Consumers
- 30% Public authorities
- 26% Medical professionals



# Middle East

South Arabia / United Arab Emirates / Bahrain / Qatar / Oman



FOOD 360

KANTAR TNS

## Taste



**76%** Are paying more and more attention to choose high quality food products

### TOP 8 EATING WELL IS...

- 49% Healthy eating
- 41% Varying your meals
- 38% Enjoying your food
- 34% Eating a balanced diet
- 32% A time to enjoy with family or friends
- 31% Eating gourmet food
- 29% Eating very tasty food
- 27% Eating good quality food

## Le sens...

C'EST IMPORTANT D'ACHETER DES PRODUITS ALIMENTAIRES...

- 76% Plus respectueux du bien-être animal
- 64% Avec des emballages bio-dégradables
- 58% Avec moins d'emballage / de sur-emballage



## True

**92%** Need more transparency regarding food products

### TOP 5 NEED FOR MORE TRANSPARENCY ON...

- 68% Ingredient list/composition
- 59% Farming/breeding conditions
- 55% Manufacturing process
- 53% How ingredients affect your health
- 52% Ingredients origins

## Planet Food commitment

**84%** FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 40% Medical professionals
- 39% Public authorities
- 33% Consumers
- 33% The Government
- 29% Large agro-food companies





# United Kingdom

## Taste



**50%**

Are paying more and more attention to choose high quality food products

### TOP 6 EATING WELL IS...

65%	Eating a balanced diet	56%	Enjoying your food
60%	Eating good quality food	45%	Eating very tasty food
58%	Healthy eating	40%	Varying your meals

## Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 93%** More respectful of animals well-being
- 79%** With less packaging or overwrapping
- 75%** With biodegradable packaging



## True

**84%**

Need more transparency regarding food products

### TOP 5 NEED FOR MORE TRANSPARENCY ON...

48%	Ingredient list/composition
41%	Ingredients origins
40%	Food safety
35%	Farming / breeding conditions
32%	Storage conditions

## Planet Food commitment

**88%**

FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 48%** Farmers / breeders
- 40%** Public authorities
- 36%** Trades / shopkeepers
- 33%** Consumer associations
- 32%** Retailers



# Russia

## Taste



**65%**

Are paying more and more attention to choose high quality food products

### TOP 6 EATING WELL IS...

68%	Eating good quality food	56%	Enjoying your food
60%	Varying your meals	50%	Eating a balanced diet
58%	Healthy eating	50%	Eating very tasty food

## Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 64%** More respectful of animals well-being
- 57%** With less packaging or overwrapping
- 54%** With biodegradable packaging



## True

**96%**

Need more transparency regarding food products

### TOP 6 NEED FOR MORE TRANSPARENCY ON...

74%	Ingredient list/composition
59%	Food safety
59%	Storage conditions
44%	Ingredients origins
43%	How ingredients affect your health
43%	Manufacturing locations

## Planet Food commitment

**67%**

FIND IMPORTANT TO REDUCE FOOD WASTE

### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 40%** Farmers / breeders
- 37%** Consumers
- 34%** Small agro-food companies
- 30%** Consumer associations
- 30%** Medical professionals





# PLANET FOOD FOR TRUE FOOD FOR MANUFACTURERS



The food industry is putting an increasing emphasis on products with a true, authentic taste, so that consumers can rediscover the pleasure of taste. Yet the "true" dimension, from the manufacturers' perspective, is also about pleasure and safety.

Or when gastronomy and transparency are mixed together. Once this is cooked up, what does it produce? Let's find out.

## A PLEASURE THAT IS ACCESSIBLE WHILE BEING HEALTHY!

If pleasure is now meant to be healthy, it is also proving accessible, in both senses of the term: within reach, and affordable. It is within reach thanks to the development of new online offerings, highly focused on wellness and health, and which are proving extremely popular particularly, but not solely, with the millennial generation in the developed world. Today it is possible to get healthy meals delivered at all times of the day at prices that are "accessible" to all.

### Global trend



## THE FASHION FOR SELF-PRODUCTION AND LOCAL PRODUCE

### At home or close to home is better!

To rediscover the taste of healthy food, manufacturers have for some years been placing the emphasis on self-production. What this refers to is any product that enables consumers to produce their food themselves. For a long time, this was restricted to growing herbs, but it has now been successfully expanded into vegetables, beer and other products. What is in fact important to consumers - and agri-food manufacturers have understood this - is restoring the link between the consumer and the product; bringing the former closer to the latter, even if this also means producing locally! Perceived as healthier and better controlled, local production is enjoying great success all round the world, with extra effort going into fresh produce that is unprocessed or subjected to very little processing. It is a trend that continues to grow in Europe and North America,

but which has been in place for a long time in Southeast Asia where aquaponic systems - growing vegetables in apartments, for example - are quite familiar.

## Global trend, but stronger in Southeast Asia for self-production, and in America and Europe for local production.



## SAFE PLEASURE: FIRST AND FOREMOST ORGANIC PLEASURE

Organic is growing worldwide! This market, which is profiting from consumer awareness of food risks and, to a lesser degree, from the ecological concerns of consumers, is sparking the interest of more and more stakeholders. The numbers of producers, processors and distributors are growing. And the big brands, still very cautious until recently, now have definite "organic" goals. In this context of a change in the organic scale, the offering is becoming segmented. Other added values or benefits are increasingly being promoted, for Organic that is in harmony with social, environmental and allied values, such as local production, animal welfare, respect for traditional processes, fair pay for producers, and the absence of undesirable ingredients (palm oil, added sugars, GMOs, etc.). This offering is expanding to meet the needs of increasing numbers of people.

## Global trend, but particularly strong in the USA, France, Germany and China.



## PLANTS FOR PLEASURE

Safe pleasure is also about the guarantee of healthy pleasure. And the plant-based (or "vegetal") is a big part of this. In all the history of SIAL, never has the vegetal been subject to such a frenzy of innovation! Over the past two years the phenomenon has considerably accelerated, with an offering aimed not only at vegetarians but at this new category of consumers that we call flexitarians, who are ready to favour vegetarian ingredients as their main dish, although without abandoning meat and fish, which they tend to consume less frequently while opting for better quality. Consequently, the offering today includes a pleasure and convenience dimension that it did not have previously. Examples of vegetal "pleasures" include the many ranges of pulse-based preparations investing food store shelves, and products in the chiller cabinets based on plant milk (soy, almond, hazelnut, coconut, etc.).

## Global trend, but particularly strong in Europe and China.



TRIBALLAT  
Soy and wheat crunchy "fingers" nuggets



ANDROS  
Tasty veggie dessert of coco milk and almond

RESTORING THE LINK BETWEEN THE CONSUMER AND THE PRODUCT

Xavier Terlet



# PLANET FOOD FOR TRUE FOOD FOR FOODSERVICE



Foodservice is also taking the “true” path, to cater to the growing appetite of consumers for meals that are more natural and better for health, not to mention expectations in terms of information and transparency. The revolution in what is true or real in food is generating an acceleration in the history and events concerning foodservice. Reviewing the latest upheavals...



THE FASHION FOR THE HOME-MADE IS SO KEENLY PURSUED TODAY, IN MOST DEVELOPED COUNTRIES, THAT MANY ESTABLISHMENTS HAVE NO HESITATION IN STATING THIS ON THEIR MENUS



Bernard Boutboul

## HOME-MADE OR THE RETURN TO REAL, “TRUE” FOOD

Foodservice is harking back to the home-made, and not just any home-made, but “true” home-made, prepared in front of the customer, with ingredients that are both fresh and raw, in other words: *“...the true ‘home-made’ that responds to the food crises of recent years and the suspicions arising from them,”* as described by Bernard Boutboul. This marks a commitment from restaurateurs for restoring the confidence of consumers, who are increasingly informed and connected via the social networks. These include of course the well-known Tripadvisor, but also the less well-known Foursquare, a foodservice social network much-used by millennials, a generation born into the digital and who have no hesitation in posting opinions and comments about the establishments visited. It is therefore in the interest of foodservice professionals to remain vigilant and propose “true” cuisine in terms of taste and authenticity.

## TRUE QUALITY REQUIREMENTS

The fashion for the home-made is so keenly pursued today, in most developed countries, that many establishments have no hesitation in stating this on their menus, to underscore their “home-made” credentials, *“as a means, of course, of winning over customers,”* as Bernard Boutboul points out! Why is this phenomenon currently running at full steam? *“Quite simply because customers will no longer accept being served food that they could easily make for themselves at home; the worst thing being leaving a restaurant with the impression that you’ve eaten less well than you would have at home.”* “Home-made” is therefore first and foremost a quality requirement for the restaurant experience. It is also about the desire to rediscover the original taste of products and the simplicity of the flavours of yesteryear.

## WHAT IF THE “HOME-MADE” WERE ABOVE ALL ABOUT A NEED FOR TRANSPARENCY?

Yet let us be perfectly clear: behind this notion of “home-made” also lies a desire, or rather a need - on the part of consumers - for transparency. Transparency in the choice and sourcing of ingredients. Transparency in how they are prepared. Transparency in the selection of what accompanies them. *“The age of the kitchen hidden in the basement or well away from the dining room is over,”* Bernard Boutboul acknowledges. Consumers today want to see their dish being cooked, thanks to a mechanism using a camera filming the hob live and a screen in the dining room broadcasting the “ceremony”, such as a famous international chain of pizzerias now proposes, for example. The easiest option being, maybe, to set up the kitchen in the dining area itself. It’s a layout that is increasingly in vogue throughout Planet Foodservice, offering customers a unique experience... a bit like being at home!

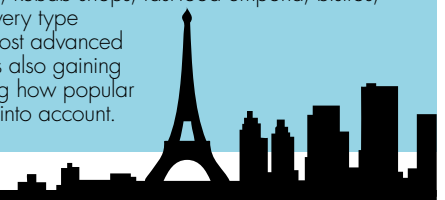


## HEALTHY FOOD FASHIONABLE IN FOODSERVICE TOO

No more bland healthy food! Until recently, vegan or vegetarian restaurants proposed meal that were good for your health but which weren’t particularly centred on “pleasure”, so important for consumers. All this has changed. And it is, once again, California that is leading the way, with the emergence of a “healthy pleasure” foodservice offering. Now everyone is at it, even McDonald’s, which proposes, in France, a vegetarian range for a healthier image: a burger that they claim is still just as tasty! Before, the veggie offering was the exception: now it comes as standard, *“...to the point that an establishment not proposing a vegetarian (or vegan) option could today be considered something of an oddity,”* Bernard Boutboul reflects wryly.

## TOWARD THE END OF “JUNK FOOD”?

As a sign of the success of “true” values in foodservice, “junk food” is declining in favour of quality foodservice, served directly at the counter or in self-service, at affordable prices, typified by the “fast casual” trend, which is a real phenomenon in the United States! Unthinkable barely a few years ago, fast food too is adopting “home-made” and “bespoke” values, with California again playing the role of the foodservice lab of tomorrow, whereby even the smallest establishments are likely to propose fresh and personalised cuisine, for eating-in or to-go. Local eateries, kebab shops, fast-food emporia, bistros, cafes: the quest for “real” or “true” food involves practically every type of establishment. And while the zones of the world that are most advanced in this area are the most developed countries, this revolution is also gaining ground in North Africa and around the Indian Ocean, proving how popular this is with consumers and how the professionals are taking it into account.



# 3 MEANING



LOOK DEEPER



# FOOD IN THE EMPIRE OF THE SENSES

Wolfing something down at home, going out to the restaurant, spending quality time over a long meal: what is it really all about? For a long time now food has no longer been simply about satisfying a basic physiological need. The pleasure dimension is a standout feature, associated with better taste and eating well, and now it is "true" or "real" food that is pervasive on Planet Food. This is, in a way, the icing on the cake! Yet let us not be mistaken: the great revolution underway on Planet Food also relates to the new "sense", or meaning, that we ascribe to food. Here again there are surprises in store.

THE MANY LIVES OF THE CONSUMER...

## RESTAURANTS...



Restaurants go back to basics to restore meaning for the consumer.



### THE INN MAKES ITS COMEBACK

The inn, or "auberge" in France, was traditionally a place where you could enjoy fresh produce, cooked on the premises, while being able to take time out and relax.



These havens of peace and good cuisine are now being reinvented, for today's tastes.

### WHERE IS THIS HAPPENING?

Mainly in France, the UK, Canada, the USA and China, where new restaurant concepts are akin to the inn concept.

Establishments that focus on...



DECOR



AMBIENCE



SERVICE



FRESH, QUALITY CUISINE



### THE RESTAURANT IS BECOMING THE PLACE FOR GASTRONOMIC PLEASURES ONCE AGAIN



Consumers seem to lead a double life when it comes to food...



They are particularly attentive to taking care with their diet and watching what they eat at home... But they tend to let themselves go at the restaurant...



Indeed, the more the fashion for healthy food is reflected in the contents of household refrigerators, the more consumers seem to consider the restaurant as somewhere to go to indulge their "guilty food pleasures".

And this even though the healthy food vogue is also simultaneously making its mark in the foodservice sector!



### THE RESTAURANT MOVES INTO THE HOME

The restaurant has found the best way of pleasing the consumer: by taking itself to them...



Home delivery has become massive, with the appearance and growth of the likes of Uber eats, Foodora and Deliveroo...

## 20 to 25%

OF FOODSERVICE REVENUE

de la restauration proviennent désormais now comes from home deliveries...



Today there are even services proposing a **totally virtual restaurant**, so that users of Foodcheri and Frichi don't have access to a catalogue of establishments, but to **menus proposed by the app** itself...

### QUESTION: WILL THE DIGITAL FINISH BY KILLING OFF THE RESTAURANT?



The answer from the expert, Bernard Boutboul:

"No, it won't, but on one condition: that the restaurant can retain its added value. The personnel, the decor, the locale and, above all, the service: the restaurant has many differences and assets to draw upon, so that consumers can make sense of - find the meaning in - going to the restaurant."



### WITH HYBRIDISATION, CONSUMERS AREN'T JUST GOING TO THE RESTAURANT

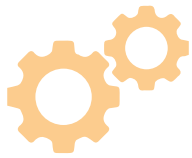
Other stores, and not just food stores, are dedicating a section of their floor space to foodservice, as a means of enhancing the customer experience and making them buy more!

### WHERE IS THIS HAPPENING?

Practically all around the world store concepts are flourishing, combining, for example, fashion and food service, or supermarkets with a well-developed food service offering: take Whole Food (US) and Ralf (US), which propose extensive fresh food buffets at very competitive prices.

Already widespread in China, the digitalisation of foodservice should make it possible to develop the customer experience by proposing: greater personalisation in the offerings, or in terms of communication, faster service, a new form of interaction.





THE MANY LIVES OF THE CONSUMER...

# AT THE SUPERMARKET...

Consumers have more and more choice on shelves stacked with safe and responsible pleasures where they find...



## NATURAL, FUNCTIONAL PLEASURE PRODUCTS

The success of these natural products can be largely explained by their scientifically-proven action on the microbiota...

### 1. SUPERFRUIT

ex: Berries rich in antioxidants

Exhibitor: FAVELLA GROUP - SUD RIENERGY (ITA)  
Brand: Sud Rienergy - Product name: Wellness Drink

### 2. SUPERVEGETABLES

ex: Spinach and cabbage

Exhibitor: VITAGERMINE (FRA) - Brand: VITABIO  
Product name: Fruit and vegetable cocktail

### 3. SUPERSEEDS

ex: Chia seeds

Exhibitor/brand: NUHEALTH JSC (BGR)  
Product name: Bio Organic Rice Chips with Super Seedx

### 4. MICROALGAE

ex: Spirulina

Exhibitor/brand: BISCUITERIE DE L'ABBAYE (FRA)  
Product name: Green Up'

### 5. FERMENTED PRODUCTS

ex: Kombucha

Exhibitor: CAPTAIN KOMBUCHA (PRT)  
Product name: MyGutness



1



2



3



5

## "FREE-FROM" PRODUCTS OR THE SUCCESS OF THE CLEAN LABEL

A trend that has been a hit the world over for several years, and which is still growing stronger as manufacturers take account of the issues of transparency and commitment.

### 6. GLUTEN-FREE

EXHIBITOR/BRAND: DE CARE GROUP (POL)  
Product name: Yummy Pizza Mix

### 7. PESTICIDE-FREE

Exhibitor/brand: SAVEOL (FRA)  
Product name: "Cœur de Pigeon" tomatoes, without pesticide

### 8. FREE OF ANTIBIOTICS

Exhibitor/brand: SALUMIFICIO FRATELLI BERETTA SPA (ITA)  
Product name: Puro Beretta

### 9. NO NANOPARTICLES, NO BPA

Exhibitor/brand: CASA AMELLA (ESP)  
Product name: Organic pumpkin soup cream



6



7



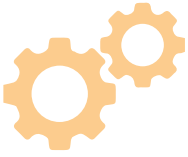
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9







## ANTI-WASTE PRODUCTS

Everyone's a winner: the environment, of course; the producers themselves; and, ultimately, the consumers, increasingly sensitive to this anti-waste commitment.

### 10. PRODUCTS IN SMALL PORTIONS

Exhibitor: POLENGHI GROUP SPA (ITA)  
Brand: LIQUIDO D'ORO - Product name: Squeazy Olive

### 11. PRODUCTS CONTAINING INGREDIENTS THAT WOULD PREVIOUSLY HAVE BEEN REMOVED FROM THE CYCLE

Exhibitor/brand: SAPPE PUBLIC COMPANY LIMITED (THA)  
Product name: Chim Dii



## "FAIR PRICE" PRODUCTS...

For a long time, fair trade in food ran along North-South lines. Nowadays, other exchange flows exist, this time running North-North. In Europe, in particular, fair trade is getting a new lease of life.

### 12. TO GUARANTEE FAIR PAY FOR PRODUCERS

Exhibitor: INGREDIA - PROSPERITE FERMIERE (FRA)  
Brand: PROSPERITE FERMIERE INGREDIA  
Product name: Lait UHT Prospe via Lacta



## ECOLOGICAL PRODUCTS

### 13. ECOLOGICAL PRODUCTS

Exhibitor: Triballat Noyal SOJASUN - VRAI (FRA)  
Brand: PETIT BRETON  
Product name: Mon Lait Petit Breton 1/2 écrémé

### 14. REDUCED PACKAGING

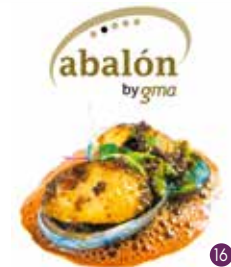
Exhibitor/brand: CITTERIO GIUSEPPE (ITA)  
Product name: Armonie di Verdura

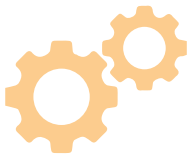
### 15. ECO-DESIGNED PACKAGING

Exhibitor: SASU LDC SABLE (FRA)  
Brand: ARRIVÉ / GRAIN DE NATURE  
Product name: "Grain de nature" range

### 16. MORE ECOLOGICAL PROCESSES

Exhibitor/brand: ABALON BY GMA (Retailer - ESP)  
Product name: Japanese Abalone





# CONSUMER

# WISH TO FIND NEW MEANING IN WHAT THEY EAT...

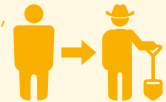


## BY SHOPPING DIFFERENTLY

Consumers are getting closer to producers to do their food shopping, by favouring short supply chains (producer stores/cooperatives, farm shops).

In the use of short supply chains between 2016 and 2018, IN FRANCE, THE UK AND RUSSIA

**Strong growth**



## BY MODIFYING THEIR DIETARY HABITS

Consumers are increasing their consumption of:



### Fish

STRONG INCREASE between 2016 and 2018

**+11%** IN FRANCE

**+8%** IN RUSSIA



### Fruit & vegetables

STRONG INCREASE on Planet Food

**+50%** OF CONSUMERS

say they have increased their consumption of fruit & vegetables



### Plant-based products & beverages



VERY STRONG INCREASE in Spain, China and Southeast Asia

AT THE SAME TIME, consumers are reducing their consumption of: **Meat / Cheese and dairy products**

## Declining trend, VARYING BETWEEN COUNTRIES



**How are we to interpret this decrease? Are the products themselves the reason for this, or is it a question of commitment? What the consumers say...**

**80%**

OF CONSUMERS

say that **it is important** for them to buy products that are **more respectful of animal welfare** (one-third consider this very important).



### MARKET RISE

in France, the UK, China and the Middle East of this concern for animal welfare among consumers

**82%**

OF CONSUMERS

consider **it quite or very important** to buy food products that are **more environmentally-friendly**.



### A KEY ISSUE PARTICULARLY

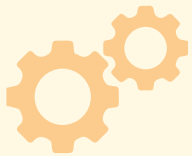
in France, Spain, Germany, China and Southeast Asia.



**74% OF CONSUMERS**, worldwide, consider **it quite or very important** to buy products **with less or no packaging**.



**72%** are in favour of **biodegradable packaging**, which demonstrates the expectations associated with this solution.



## Consumers are now starting to see themselves as an essential link in the Planet Food chain...



**... BUT THEY CONSIDER COMBATING WASTE TO BE EVERYONE'S BUSINESS**  
While consumers consider themselves in general to be **the main parties involved in combating waste**, they consider that **the distributors and restaurateurs** come a close second.



**AT THE SAME TIME, CONSUMERS ARE SHOWING CONCERN OVER THE EARNINGS OF ARABLE AND LIVESTOCK FARMERS**  
who, in the opinion of **48% of those polled, globally, are not compensated fairly for their work** 48% globally... but 73% of the French, 68% of Spaniards and 60% of Germans!



### What is to be done?

**75%** OF CONSUMERS

say they are prepared to buy products that are a little more expensive if this allows everyone's efforts to be better rewarded.



## Above all, they expect the stakeholders of Planet Food to commit to healthier, better quality food...

**Arable and livestock farmers**  
Cited in particular by 67% of the French.

**Consumer associations**  
Cited above all by the Germans and the Spaniards.

**The authorities** in China and the Middle East in particular.

**Artisans-traders / agri-industry professionals**  
Particularly in France for the former and above all in China for the latter.



# COMMITMENT FROM ALL OF PLANET FOOD

As the Food 360™ study demonstrates, the notion of commitment is enshrined in the expectations of consumers: their own commitment, but also the commitment of the other stakeholders of Planet Food. It is as if, individually, everyone were becoming aware of being a link in a vast chain. But just what are these commitments that we are talking about? And just what do they involve for Planet Food, in concrete terms? Nicolas Trentesaux SIAL Network Director, offers some answers.

**COMMITMENT IS ONE NOTION, AMONG OTHERS, THAT EMERGES FROM THE STUDIES THAT HAVE BEEN CARRIED OUT. JUST HOW DOES THIS NOTION STAND OUT FROM THE OTHERS?**

**Nicolas Trentesaux:**

«It is not just one notion among many. It is a central issue - the big issue, you might say - which is highly symptomatic of the age in which we are living, and it goes far beyond the question of food. In a world that is hyper-connected through the Internet, through the means of communication generally, and through the means of transport, we are more keenly aware of everyone else's existence. We also realise just how fragile our planet is. So, if we apply this observation to the question concerning us, food: not only is everyone aware of the existence of the other players on Planet Food, but also of the responsibilities incumbent on us all. And because today we know about practically everything, any information can be transmitted and shared at the speed of light, and so it's better to make a commitment and not be found wanting with regard to your responsibilities!»

**ARE PROFESSIONALS TRULY CONSCIOUS OF THESE ISSUES, AND CONCERNED BY THESE COMMITMENTS OF WHICH YOU SPEAK?**

**N.T.:** «The studies by our three Consumption, Industry and Foodservice experts struck me, precisely, because their analyses all tallied. There is a kind of coming-together between the expectations and the responses to these expectations. Were this not the case, we might have something to worry about! So the answer to your question is: yes! The professionals are perfectly conscious of this issue of commitment and of their responsibilities. We see more and more artisans, manufacturers and traders innovating with the aim of reassuring consumers, and of meeting consumer expectations in terms of pleasure and "eating well", food safety, and transparency. Don't get me wrong, I'm not saying they didn't do this in the past, but today the expectations and responses are being coordinated like never before! A committed and substantiated producer argument - backed by proof - can today not only be heard but is also expected by the consumer.»

“  
THE PROFESSIONALS  
ARE PERFECTLY  
CONSCIOUS  
OF THIS ISSUE  
OF COMMITMENT  
AND OF THEIR  
RESPONSIBILITIES  
”

Nicolas Trentesaux

“  
WHAT IS NEW  
TODAY IS THIS  
PARTICULAR  
CONFIGURATION  
OF "PLANET FOOD".  
EVERYONE IS  
MOVING FORWARD  
TOGETHER,  
IN SYMBIOSIS!



”

Nicolas Trentesaux



**20 TO 25%**  
**OF FOODSERVICE**  
**REVENUES**  
comes from home  
deliveries.



### **HAVE THE FOOD PROFESSIONALS THEREFORE REACTED TO THE EXPECTATIONS EXPRESSED BY CONSUMERS?**

**N.T.:** «The food world no longer operates like that, following a bottom-up/top-down logic! What is new today is this particular configuration of "Planet Food". Everyone is moving forward together, in symbiosis! I'm going to give you a few examples and statistics that attest to this food revolution that we are living through. The Food 360™ study tells us that 38% of consumers believe first and foremost in the action of arable and livestock farmers to produce food of good quality and which is good for health. Traders/artisans are cited by 29% of consumers, agri-food SMEs by 26%, and large agri-food companies and supermarket chains by 20%. To sum up, in the eyes of the consumer everyone is concerned! At the same time, our Industry and Foodservice experts have revealed to us a whole range of innovations - and there are more and more cropping up every day, such as the innovative frenzy at play, as you'll be able to witness for yourself at SIAL, let me assure you - in favour of greater quality and transparency, and in the service of "eating well". I'm thinking of the premiumisation of everyday food, which is currently on the crest of a wave, or the vogue for bistronomy, spreading worldwide like wildfire. I'm also thinking of home meal deliveries, or the health trend that is strongly pronounced and causing a shift from restaurant to home, to the extent that this accounts for no less than 20 to 25% of foodservice revenues in the developed world.»

### **WHO WAS FIRST RESPONSIBLE FOR GENERATING THIS IMPETUS?**

**N.T.:** «It's a bit of a chicken-and-egg situation! Food innovation nourishes new demand, which in turn incites the professionals to pursue and amplify their innovative efforts. And the feedback from consumers also informs us about the new gastronomic territories on which we need to focus. In fact, this brings us to a crucial point: the consumer has become a stakeholder in innovation who is at least as important as the manufacturers or the restaurateurs. You may say that this has always been the case, since the innovations are aimed at the consumer. This is true, but here again we are no longer in a bottom-up/top-down logic, but rather in an interdependent and collaborative logic for food innovations, which themselves generate other innovations. In short, a virtuous cycle of innovation in the service of the consumer! »

“  
IN THE EYES  
OF THE CONSUMER  
EVERYONE  
IS CONCERNED!  
”

Nicolas Trentesaux

### **ARE PROFESSIONALS THEREFORE NOT INNOVATING AS THEY DID BEFORE? HOW WILL FOOD INNOVATION FUNCTION IN TOMORROW'S WORLD?**

**N.T.:** «Not only is the sector innovating far more than before - the space taken up by innovation at SIAL Paris has never stopped growing since its inception - but the agri-food industry is also innovating differently, permanently driven by and focused on the desires and expectations of all concerned. I'm not referring here to collaborative efforts, but to commitment. This is the big difference from the way the world was! This food innovation effort does indeed require considerable human and financial commitment - the agri-industry is the leading sector for foreign investment according to Business France - with results and manifestations that generate a great deal of excitement for consumers, as you will be able to see at this year's show! »

**So make a date for 21-25 October at SIAL Paris to discover food committed increasingly to "taste - true - meaning"!**



# 4 TASTE, TRUE, MEANING... FRANCE AT THE DINING TABLE

Focus on France. The host country of SIAL Paris, with a rich gastronomic history, France is still a special country when it comes to food. The hearts (and appetites) of the French vacillate between tradition and modernity. In today's and tomorrow's world, what place do they accord to taste, to what's real and true, and to meaning in food matters? What do they expect from everyone involved in food? Here's what the experts have to say.



# CONSUMPTION



**ANALYSIS BY PASCALE GRELOT-GIRARD**

## FOOD STAKEHOLDER COMMITMENT, FROM THE CONSUMER POINT OF VIEW

In whom do the French have most confidence for providing healthier and better-quality food?



ARABLE AND LIVESTOCK FARMERS

**67%**

(vs. between 32% and 48% for the other European countries)



ARTISANS / TRADERS

**46%**



AGRI-FOOD SMEs

**37%**

In France, pleasure is an essential and structural dimension of the food universe! Hence: «For 63% of French people, food is above all associated with pleasure, as against 30% who consider it more a necessity,» explains Pascale Grelot-Girard, Market Intelligence Director, Kantar TNS. «This is one of the highest scores in Europe!»

Another specific - and lasting - French characteristic is that eating well is also associated with pleasure (65%), and the quest for high-quality (66%) or tasty (40%) products. Consumer expectations in terms of variety (59%) and sharing (45%) are also very high. These expectations account for the pronounced interest in food innovations that offer new tastes, textures and sensations. «But 63% of French people also want to eat healthily, and 59% to follow a balanced diet,» Ms Grelot-Girard stresses.

## A TASTE FOR WHAT'S "REAL" AND "TRUE"

«We know from our previous studies that the French are a little more worried than other Europeans about the impact of their diet on their health. Accordingly, 9 in 10 French people express the need for transparency with regard to the agri-food industry.»

And as in most European countries, this expectation relates mainly to the list and composition of ingredients (56%), but also - and above all - to their origins (61%). «Maybe this can be seen as a consequence of the horsemeat crisis and of the lack of clarity in displaying origins on food packaging.» Next come the places of manufacture (43%) and the farming conditions (42%).

The requirement for what is "true" and authentic also translates into a strong increase in the proportion of consumers who say they regularly check the nutritional composition of products on the packaging (62%: up 7 points on 2016). Another eloquent sign is the fact that the attention paid to certification labels remains very high, and the demand for organic continues to grow.

Globally, the French have a more and more holistic view of their food: «In a globalised and digitalised world, they are re-appropriating their freedom of choice by asserting strong convictions, for example in reducing their meat consumption, and choosing products that are more respectful of animal welfare and the environment - judged important by the interviewees to the tune of 91% and 90% respectively,» says Pascale Grelot-Girard.

«Consumers are highly sensitised to reducing food waste - an action judged important by 94% of them - and consider themselves to be the prime players in this regard,» scoring 66%, ahead of the supermarkets (52%), collective catering (46%) or commercial catering (45%).

«They are also proving to be sensitive to the notion of fair pay for farmers, more than in all the other countries of the study, and this is very important to know,» the Kantar TNS expert points out. «78% of the French people polled also say they are even ready to pay a little more so that this kind of work is better rewarded!»

**63%**  
**OF FRENCH**

also want to eat healthily, and 59% to follow a balanced diet



## France

FOOD 360 | KANTAR TNS

### Taste



**62%**

Are paying more and more attention to choose high quality food products

#### TOP 7 EATING WELL IS...

66%	Eating good quality food	59%	Eating a balanced diet
65%	Enjoying your food	59%	Varying your meals
63%	Healthy eating	45%	A time to enjoy with family or friends
		41%	Eating your fill

### Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 91%** More respectful of animals' well-being
- 86%** With less packaging or overwrapping
- 81%** With biodegradable packaging

In my country, farmers and breeders are well paid / compensated for their work

**73%**

Are willing to pay more for valuing farmer and breeder's work

**78%**



### True

**91%**

Need more transparency regarding food products

#### TOP 5 NEED FOR MORE TRANSPARENCY ON...

61%	Ingredients origin
56%	Ingredient list / composition
43%	Manufacturing locations
42%	Farming / breeding conditions
35%	How ingredients affect your health

### Planet Food commitment

**94%**

FIND IMPORTANT TO REDUCE FOOD WASTE

#### TOP 5 WHOM TO TRUST TO ACT FOR GOOD QUALITY AND HEALTHY FOOD

- 67%** Farmers / breeders
- 46%** Trades / shopkeepers
- 37%** Small agro-food companies
- 30%** Public authorities
- 30%** Consumers





# INDUSTRY



**INTERVIEW  
WITH XAVIER TERLET**

## **HOW ARE MANUFACTURERS TAKING ACCOUNT OF THE NEW EXPECTATIONS OF FRENCH CONSUMERS IN TERMS OF TASTE?**

### **Xavier Terlet:**

« French consumers are more concerned about authenticity than elsewhere. And because they are looking for new sensations and experiences, these need to be infused with natural virtues. So, for example, the pronounced taste of vanilla that manufacturers will offer French consumers will be less frequently provided by an additive and increasingly by a greater concentration of natural vanilla, or else by means of a natural process such as infusion, maybe. The sought-after tastes are those that provide a new and true sensation, by means of the ingredients - I'm thinking of the likes of ginger, truffle and saffron that can now be found in everyday products - or by means of natural processes such as maturation, fermentation or the malting of grain (to release all the flavours). »

## **YET IS "EATING WELL" SUBJECT TO MORE INNOVATION IN FRANCE THAN ELSEWHERE?**

**X.T.:** « I would say that it's about innovating differently. In France, there are fewer simply functional products, with health benefits, than in the Anglo-Saxon countries, for example. However, we find far more sophisticated and indulgent products, where the priority lies in providing pleasure in terms of taste, and which remain reassuring in terms of health credentials thanks to their natural composition. »

## **WHAT ARE THE MANUFACTURERS DOING TO REINFORCE TRANSPARENCY AND CONSUMER INFORMATION ON THE FRENCH MARKET?**

**X.T.:** « Today, communicating transparency is ubiquitous. Yet everything depends on what manufacturers actually want to communicate to their consumers. And I'm not convinced that initiatives such as Nutriscore relieve us of the need to go further when it comes to information requirements. The challenge involves, in my opinion, giving consumers a better grounding so that they are able to understand what information they are getting and what information they are not. We should also not lose sight of the fact that, tomorrow, it will be consumers who will have the power of information in their hands. By scanning with their smartphones, they will be able to know if there are pesticides in the vegetables on the shelves, or know how many kilometres have been covered between the place of production and the store. The manufacturers will have to adapt to this new state of affairs. »

## **WHAT INNOVATIONS, IN FRANCE, RESPOND TO THE CONSUMER QUEST FOR MEANING?**

**X.T.:** « They are many and varied, in particular with regard to natural products or the organic sector, for which revenues once again in 2017 reached a new high, at €8 billion in France (compared to €7 billion in 2016). The development of the vegetal - plant-based - offering follows the same principle: both "health concern" (in terms of the benefits gained from fruits and vegetables) and "ecology" (providing

an alternative to animal proteins). The search for sense and meaning can also relate to the creation of eco-designed products or products that are better for health: less fat, less sugar, less salt. »

## **WHAT ARE THE POINTS OF DIFFERENTIATION FROM THE REST OF THE WORLD, WHEN IT COMES TO "SENSE" OR "MEANING"?**

**X.T.:** « The quest for meaning remains above all a Western preoccupation, even if we are now observing the emergence of ecological and ethnic arguments all around the world. In terms of what's specifically characteristic of the French, I would cite combating waste, as well as fair pay for professionals, an area in which the initiatives are still fairly low-key. »

“  
THE SOUGHT-AFTER TASTES ARE THOSE THAT PROVIDE A NEW AND TRUE SENSATION



Xavier Terlet



**THE ORGANIC SECTOR  
IN 2017**

**€8 BILLION**  
revenues in France





# FOODSERVICE



**BERNARD BOUTBOUL  
DISCUSSES**

“Taste - true - meaning: in foodservice, France also has its particular quirks. First observation: the country has only very slowly taken to tastes that come from elsewhere. In chronological order, the French first adopted **Chinese cuisine** half a century ago, and it is a cuisine that quickly took its place in the foodservice landscape. Next came the cuisines from countries close to our borders, Italy and Spain in particular. Today, two geographical zones are accelerating their market penetration: **South America** - with the cuisines of Argentina and Mexico in particular – and **Asia**, with Japanese and Thai cuisine. Yet whatever the culinary tradition developed by establishments, “eating well” is now increasingly promoted on the menus. Fewer sauces, explanations of food associations and the origins or natural virtues of ingredients brought to the fore, reduced quantities in favour of the intrinsic quality of the raw materials and the taste: “eating well” has never been more popular. It’s a trend that clearly reflects the evolution of taste in the perception of the consumer. For around 5 years now we have been witnessing quite a spectacular turnaround: consumers prefer to eat less, but better. “Better” means, in their minds, “healthy and discerning”. Beyond just the taste, these consumers also expect from foodservice professionals sincere information about the ingredients used. The notion of “true” is therefore translated, in foodservice, by the end of “flashy marketing” and the start of sincere marketing, which simply tells the truth, both about the products

and their origins and about how they are prepared. The professionals are increasingly playing the transparency card. Never before in history have so many restaurateurs talked about their products. Their words can be found on the menus and the walls, but also in the physical contact with customers. This effort for transparency is combined with an extra helping of meaning. Faced by the inroads made by the digital, foodservice professionals are looking to restore some kind of meaning. The prime example of this is the development of the vegetarian and vegan offering in France. In 2005, France had a 30% flexitarian population; today it is 40%! This phenomenon has been thoroughly grasped by the sector: practically all establishments now propose a “veggie” offering aimed mainly, and paradoxically, less at actual vegetarians (who only represent 2% of the French population, and who in any case rarely go to the restaurant) than at flexitarians. Eating less meat and fish, favouring the plant-based: the quest for meaning focuses first and foremost on what goes onto our plates. But not solely. Consumers want to rediscover the original meaning of going out to the restaurant, which above all is grounded in the notion of pleasure. And as well as the pleasure on the plate, there is the pleasure in contact associated with the service, and the pleasure in meeting up in a pleasant and friendly place. These are three facets of the same notion on which French establishments, as a whole, still have plenty of work to do. ”

“  
CONSUMERS WANT  
TO REDISCOVER  
THE ORIGINAL  
MEANING  
OF GOING OUT  
TO THE RESTAURANT,  
WHICH ABOVE  
ALL IS GROUNDED  
IN THE NOTION  
OF PLEASURE  
”

Bernard Boutboul

Today  
**FRANCE HAD A  
40%**  
flexitarian population

French people  
choose more and more  
**ASIAN FOOD  
AND SOUTH  
AMERICAN FOOD**



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