

SIAL

INSPIRE FOOD BUSINESS

PLANET FOOD

AN OVERVIEW OF CURRENT AND FUTURE AGRI-FOOD TRENDS AROUND THE WORLD

TASTE, TRUE, MEANING:
PLANET FOOD
COMMITTS!

SIAL-NETWORK.COM



COME XPOSIUM

WHAT IS SIAL NETWORK?

Over the years the SIAL (Salon International de l'Alimentation) network has established a global B-to-B events platform designed specifically for the agri-food industry across all continents. The main aim is to support the sector and the many members of which it is comprised in globalising production and taste processes whilst maintaining and showcasing their local roots.

Via the running of a series of events promoting the application of innovation and new technologies to agri-food, the SIAL network has quickly turned into a global-scale agri-food innovation laboratory and the leader for the presentation of new products and services, representing 10% of worldwide innovation for the sector.

The inaugural SIAL fair was held in Paris in 1964. At the turn of the new millennium SIAL started to become a truly international organisation, assisting its partners on their various markets and thereby strengthening the global standing of the SIAL event. At present, the SIAL network totals 9 trade fairs held in Paris, Montreal/Toronto, Shanghai, Jakarta, Abu Dhabi, New Delhi, Gourmet Selection and Djazagro and boasts a vibrant community comprising over 700,000 purchasers and 16,000 companies from 119 countries.

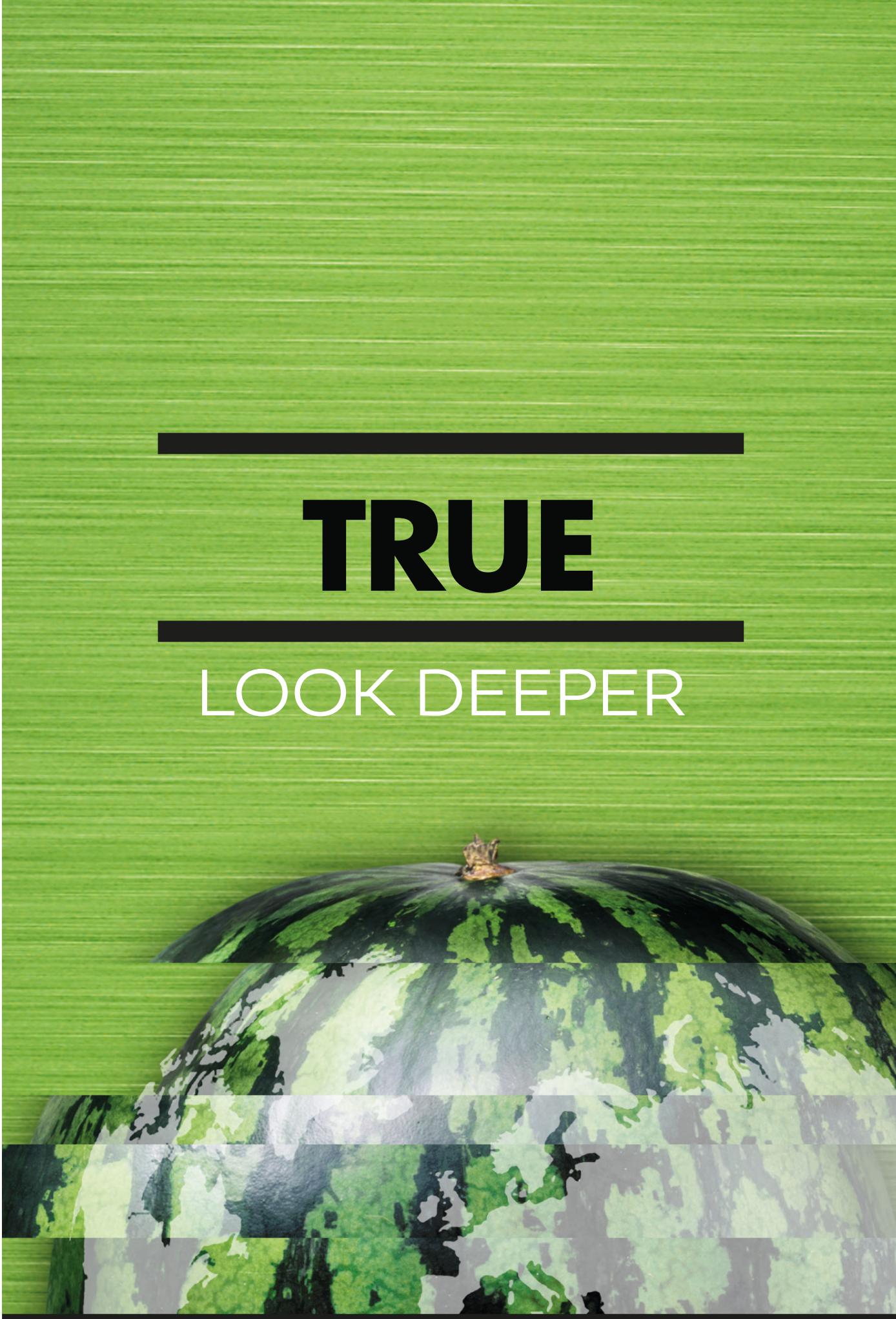
WHY PLANET FOOD?

Driven by its desire to help agri-food professionals take the right investment decisions and agri-food innovation direction, SIAL has been conducting since 2012 a study into consumption and agri-food supply trends, as well as out-of-home catering all around the world. The study is regularly updated and re-published in partnership with KANTAR TNS, XTC World Innovation and Gira Conseil. Agri-food professionals will be able to find all the results and trends established by this study in the Planet Food overview.

9
TRADE FAIRS
B2B

16,700
EXHIBITORS
from 119
COUNTRIES

700,000
ATTENDEES
from 200
COUNTRIES



TRUE

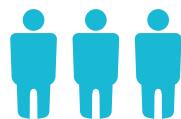
—

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

Product 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

Asian 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



KANTAR
TNS

Taste

TOP 7 EATING WELL IS...

59%

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

74% Enjoying your food

59% Varying your meals

56% Healthy eating

54% Eating a balanced diet

54% Eating very tasty food

48% Eating good quality food

45% A time to enjoy with family or friends



True

TOP 5 NEED FOR MORE TRANSPARENCY ON...

91%

Need more transparency regarding food products



50% Ingredient list/composition

48% Farming/breeding conditions

47% Ingredient origins

41% Food safety

40% Manufacturing locations

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



Planet Food commitment

50% Consumer associations

50% Small agro-food companies

41% Farmers / breeders

31% Trades / shopkeepers

30% Consumers



Southeast Asia



KANTAR
TNS

Taste

TOP 7 EATING WELL IS...

71 %

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

76% Healthy eating

73% Eating a balanced diet

61% Eating good quality food

33% Varying your meals

29% Enjoying your food



True

TOP 5 NEED FOR MORE TRANSPARENCY ON...

99%

Need more transparency regarding food products



61% Ingredient list/composition

55% Ingredient origins

43% Storage conditions

41% Farming/breeding conditions

39% Manufacturing locations

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



Planet Food commitment

57 % Medical professionals

51 % The Government

42 % Public authorities

40 % Consumer associations

30 % Farmers / breeders

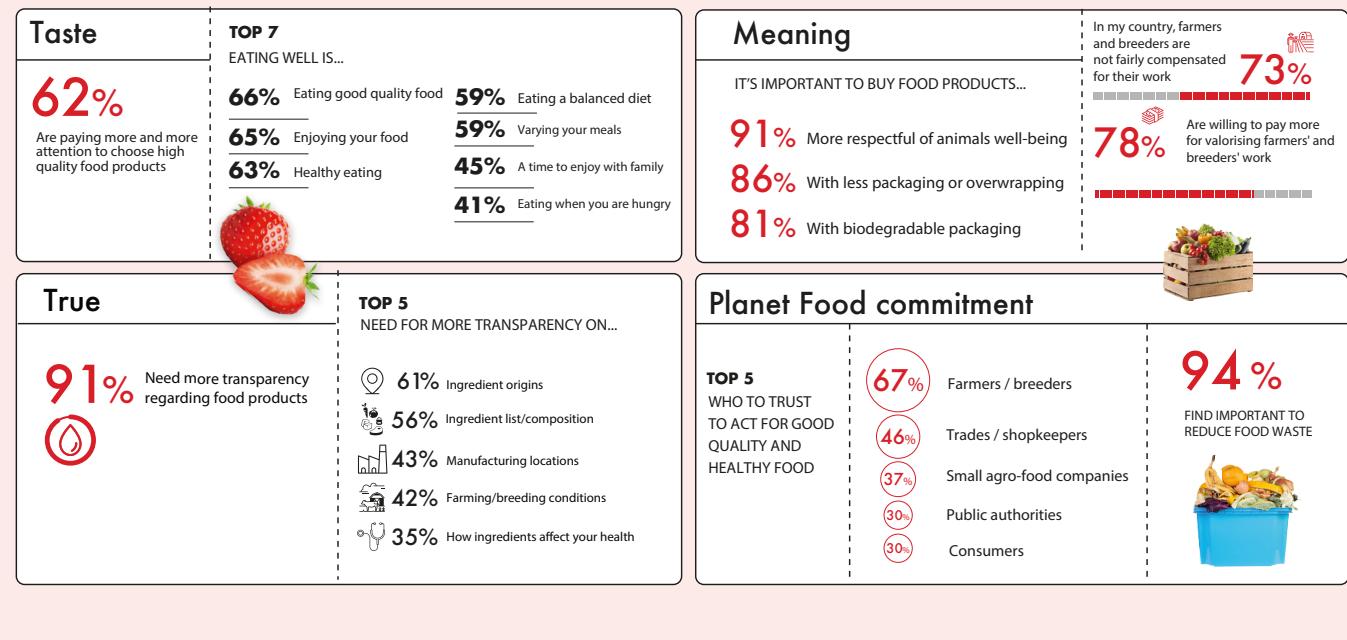
94 %

FIND IMPORTANT TO REDUCE FOOD WASTE

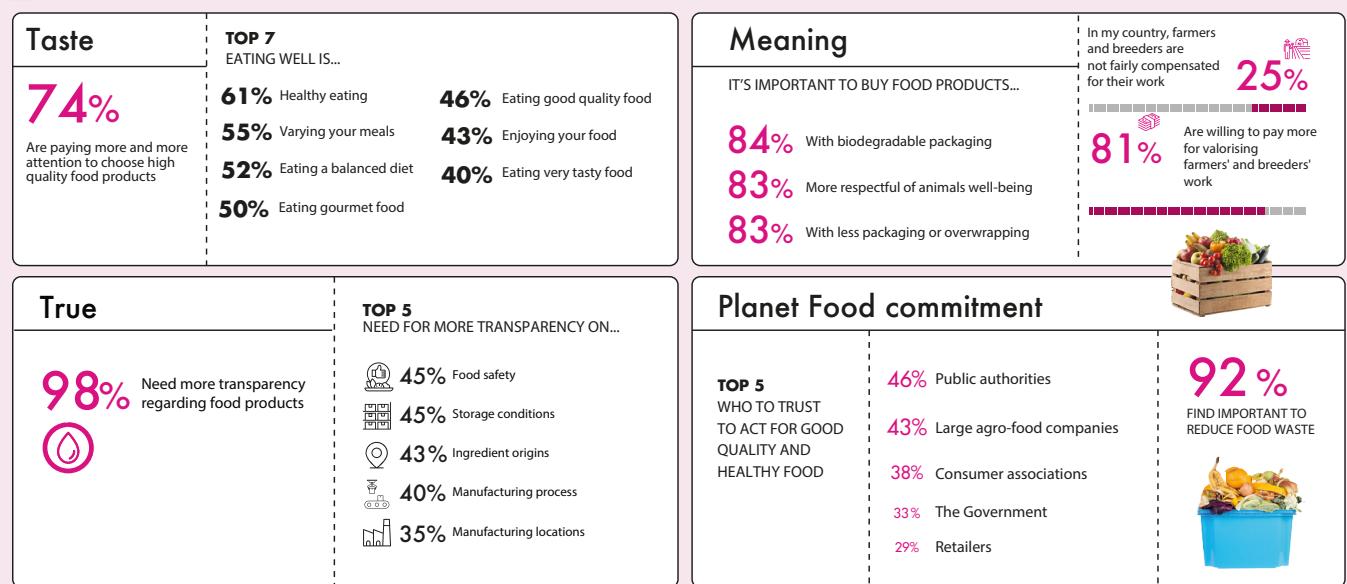




France



China





United States



KANTAR
TNS

Taste

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



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

True

79% Need more transparency regarding food products

TOP 5 NEED FOR MORE TRANSPARENCY ON...

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

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



Planet Food commitment

TOP 5

WHO 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

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



KANTAR
TNS

Taste

TOP 7 EATING WELL IS...

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



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%** Ingredient origins

Meaning

IT'S IMPORTANT TO BUY FOOD PRODUCTS...

- 76%** More respectful of animals well-being
- 64%** With less packaging or overwrapping
- 58%** With biodegradable packaging



Planet Food commitment

TOP 5

WHO 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

84 %

FIND IMPORTANT TO REDUCE FOOD WASTE





United Kingdom



KANTAR
TNS

Taste

50%

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



True

84%

Need more transparency regarding food products

TOP 5 NEED FOR MORE TRANSPARENCY ON...

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

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

In my country, farmers and breeders are not fairly compensated for their work

29%

70%

Are willing to pay more for valourising farmers' and breeders' work



Planet Food commitment

40 % Farmers / breeders

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

- 37 % Public authorities
- 34 % Trades / shopkeepers
- 30 % Consumer associations
- 30 % Retailers

88 %

FIND IMPORTANT TO REDUCE FOOD WASTE



Taste

65%

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



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% Ingredient origins
- 43% How ingredients affect your health
- 43% Manufacturing process

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

In my country, farmers and breeders are not fairly compensated for their work

48%

56%

Are willing to pay more for valourising farmers' and breeders' work



Planet Food commitment

40 % Farmers / breeders

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

- 37 % Consumer associations
- 34 % Consumers
- 30 % Public authorities
- 30 % Medical professionals

67 %

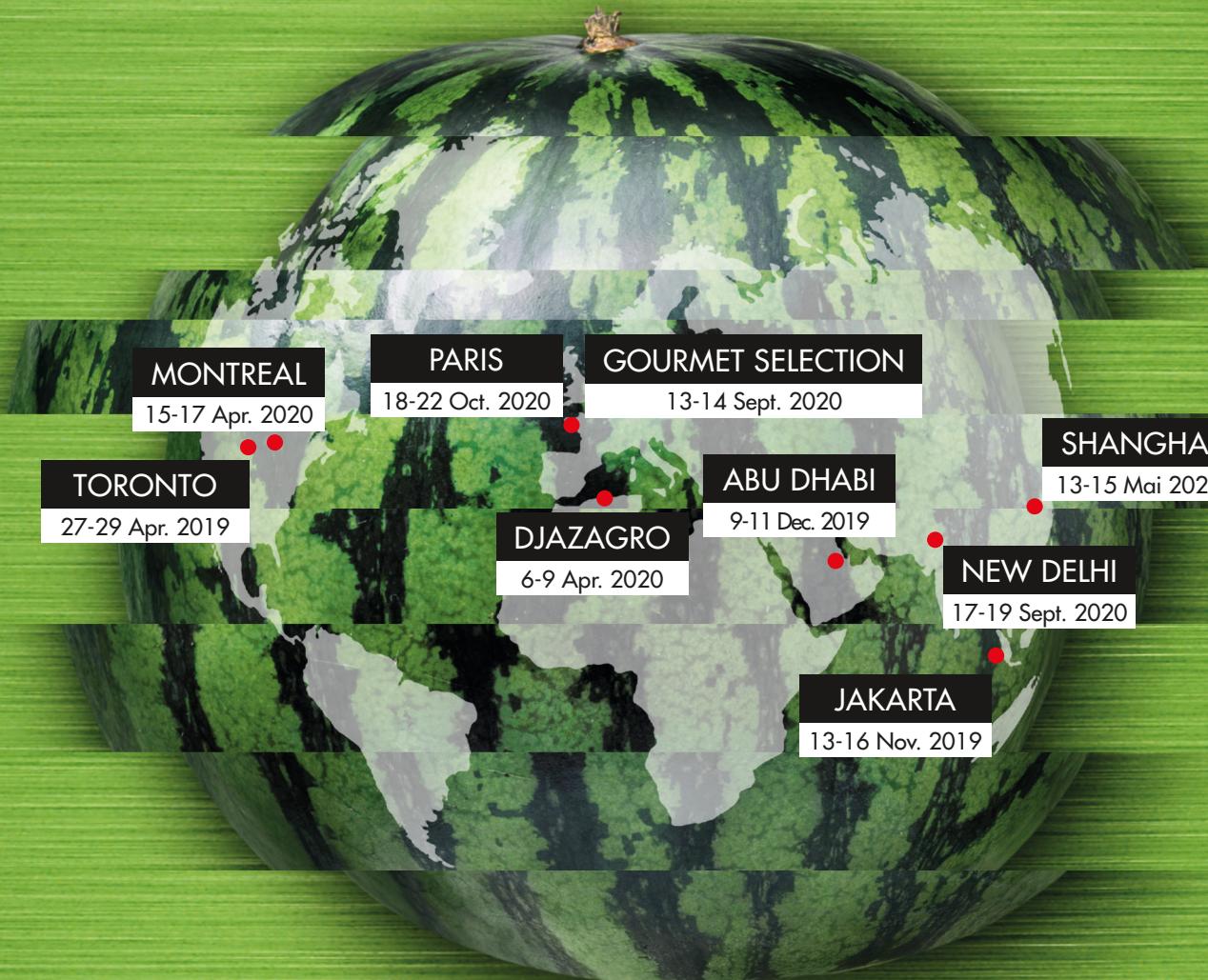
FIND IMPORTANT TO REDUCE FOOD WASTE





INSPIRE FOOD BUSINESS

JOIN THE WORLD NUMBER ONE FOOD INNOVATION NETWORK



COME~~X~~POSITION

SIAL, a subsidiary of Comexposium Group

WWW.SIAL-NETWORK.COM

9 leading B-to-B events*
16,700 exhibitors from over 119 countries
700,000 visitors from 200 countries

SIAL CONTACTS

exhibit@sialparis.com

Tel: +33 (0)1 76 77 13 33