

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

SIAL NETWORK THE PLANET FOOD LABORATORY

Since 2012, SIAL has been exploring and unveiling consumer portraits and food trends worldwide. The 2018 edition of SIAL Paris provided the opportunity to present the 4th part of the new and exclusive "Food 360°TM" 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.

TASTE, TRUE, MEANING 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°TM, 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.

GIRA
conseil



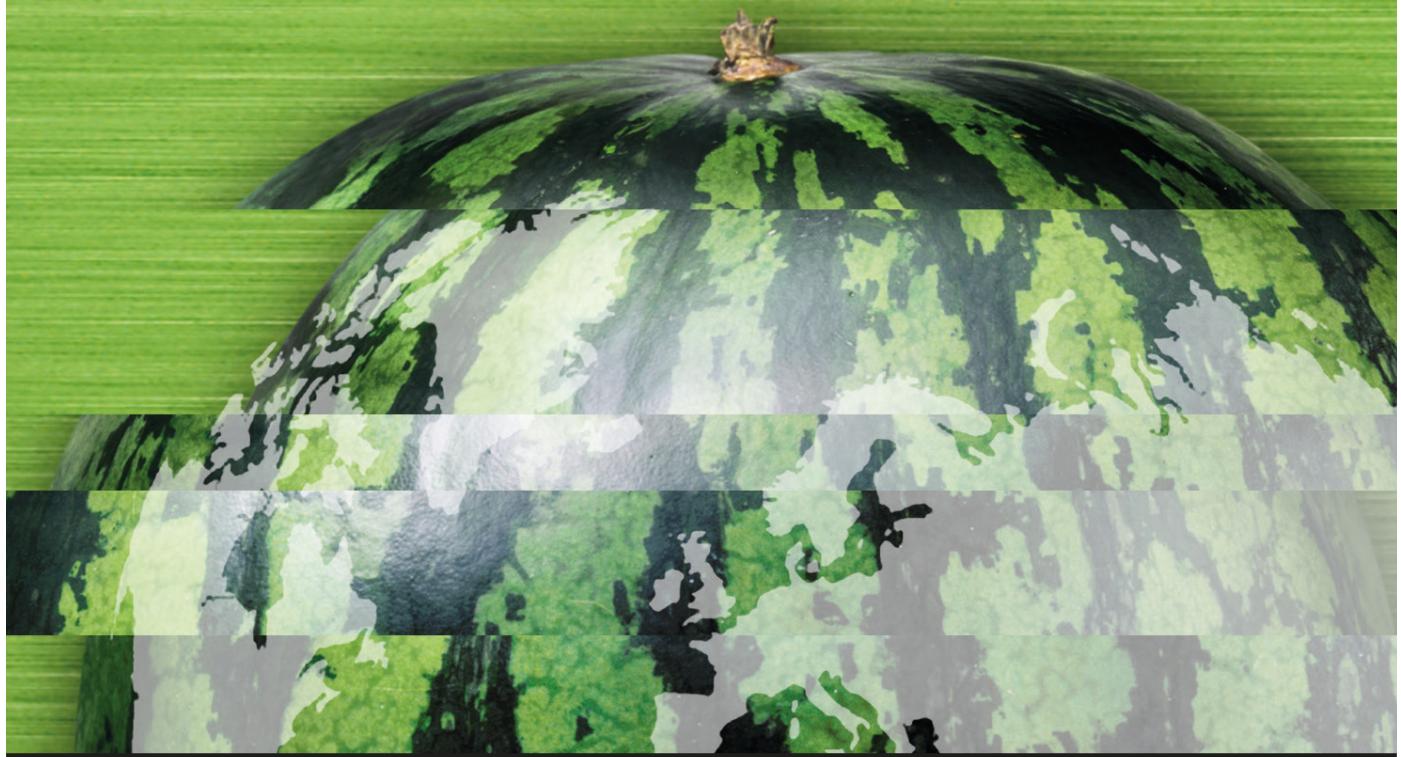
Bernard Boutboul, CEO of GIRA Conseil, this year complements the SIAL studies with a quantitative and qualitative study of foodservice trends around the world.

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

*KANTAR TNS Food 360°TM 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; Middles 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.

TASTE

LOOK DEEPER





66%

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



62%

OF CONSUMERS
like to discover
new products

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.

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. »

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
Yourt Skyr à boire

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

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

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 Asian, 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 INVARILY 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
Cereal and seeds bars
(Quinoa, linseed, ...)



LES INFUSÉES
Infused grape seed oil



HEARTLAND
Organic fruit concentrated juices to help kids to hydrate



SALMURRIA
Strong aged anchovy seasoning



FOR
66%
 OF FRENCH PEOPLE,
"EATING WELL"
 is synonymous with eating
 quality products!

P.G.G.: « This different snacking 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

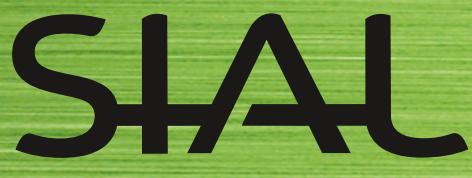
IS THIS "PREMIUMISATION", REFERRED TO BY XAVIER TERLET, ALSO AFFECTING FOOD SERVICE?

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". »

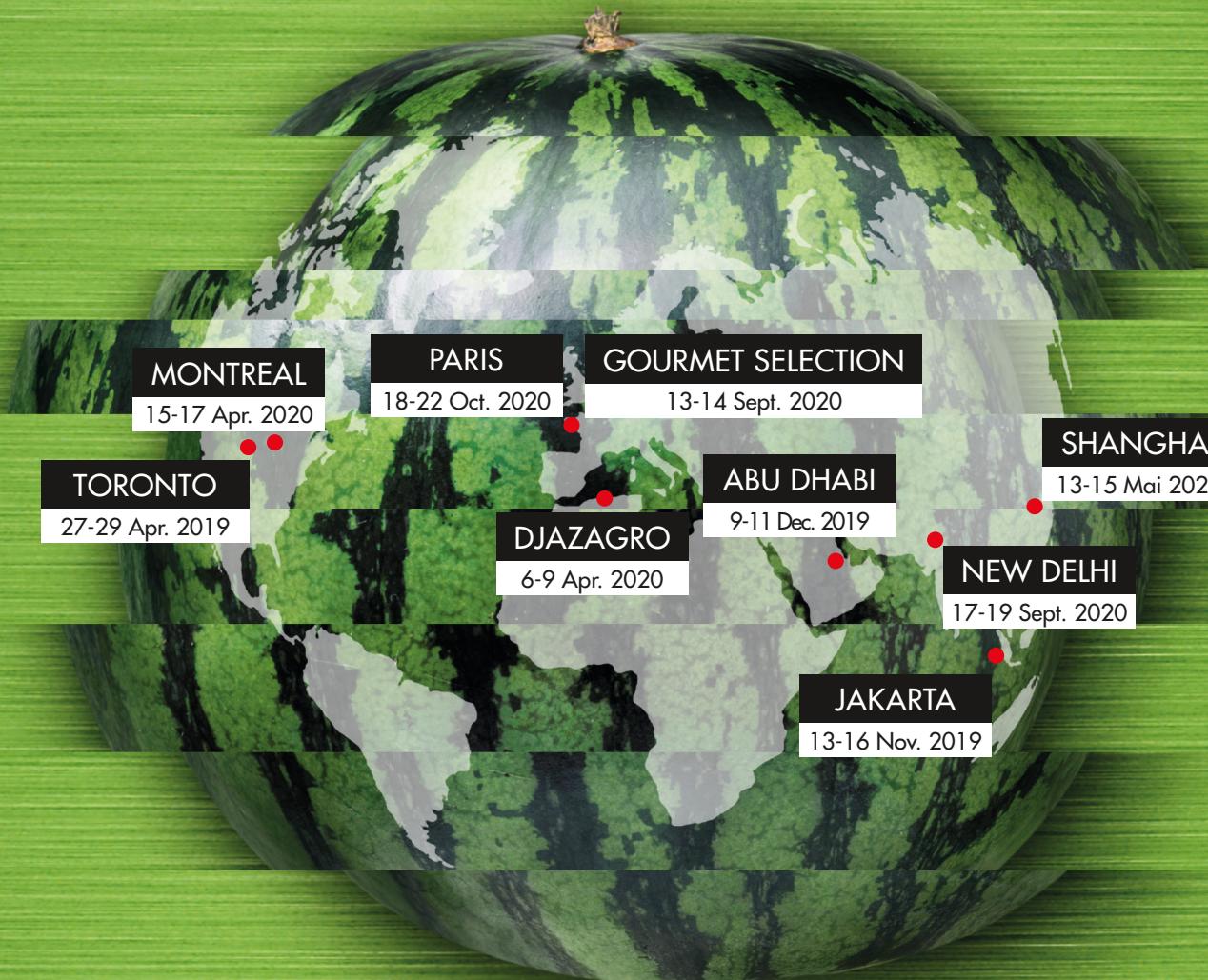
THIS DIFFERENT SNACKING OFFERING CERTAINLY ADDRESSES THE EXPECTATIONS OF CONSUMERS

Pascale Grelot-Girard



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