

# 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**

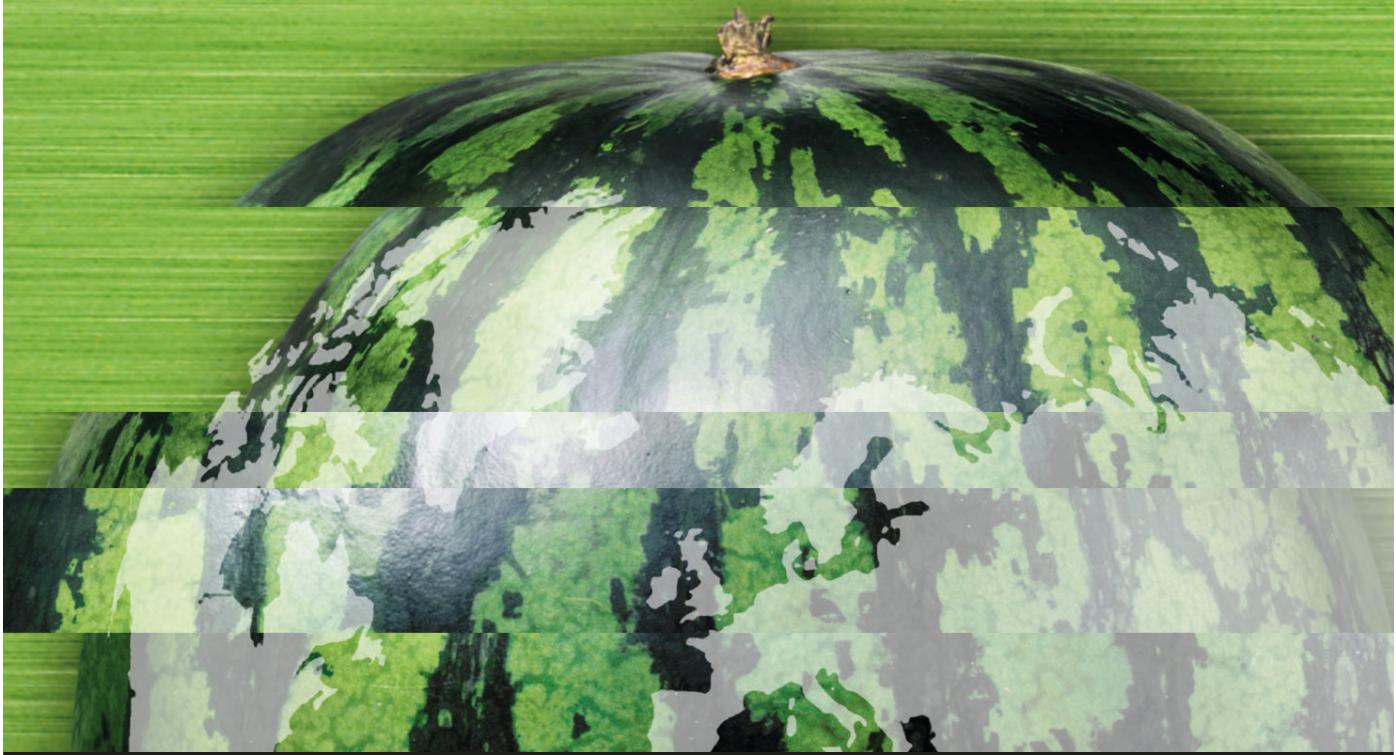
**700,000**  
**ATTENDEES**  
from **200**  
**COUNTRIES**

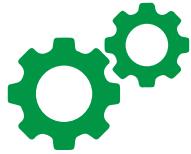
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# **MEANING**

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## 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



AMBIANCE



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 Ubereats, Foodora and Deliveroo...

**20 to 25%**

**OF FOODSERVICE REVENUE**

now comes from **home deliveries**...



Today there are even services proposing a **totally virtual restaurant**, so that users of **Foodcheri** and **Frichti** 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 Foods (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. SUPERFRUITS

ex: berries rich in antioxidants

Exhibitor: FAVELLA GROUP - SUD RIENERGY (ITA)  
Brand: Sud Rienenergy - 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 Seedsx

### 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



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

UA 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: Yummity Pizza Mix

### 7. PESTICIDE-FREE

Exhibitor/brand: SAVEOL (FRA)

Product name: "Coeur 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





## 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: Squezy 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



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## "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



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## ECOLOGICAL PRODUCTS

### 13. ECOLOGICAL PRODUCTS

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



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### 14. REDUCED PACKAGING

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



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### 15. ECO-DESIGNED PACKAGING

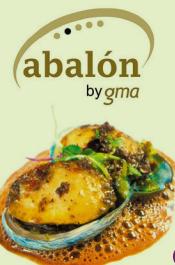
Exhibitor: SASU LDC SABLE (FRA)  
Brand: ARRIVÉ / GRAIN DE NATURE  
Product name: "Grain de nature" range



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### 16. MORE ECOLOGICAL PROCESSES

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



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# 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



## BY MODIFYING THEIR DIETARY HABITS

Consumers are increasing their consumption of:



Fish

STRONG INCREASE  
BETWEEN 2016 AND 2018

↗ +11% IN FRANCE  
↗ +8% IN RUSSIA



Fruits & 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



in 2016



in 2018

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%**  
ON 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%**  
ON 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...



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!



**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.

What is to be done?



## 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.



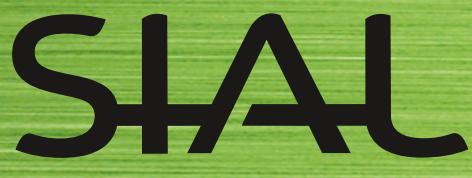
### The authorities

in China and the Middle East in particular.



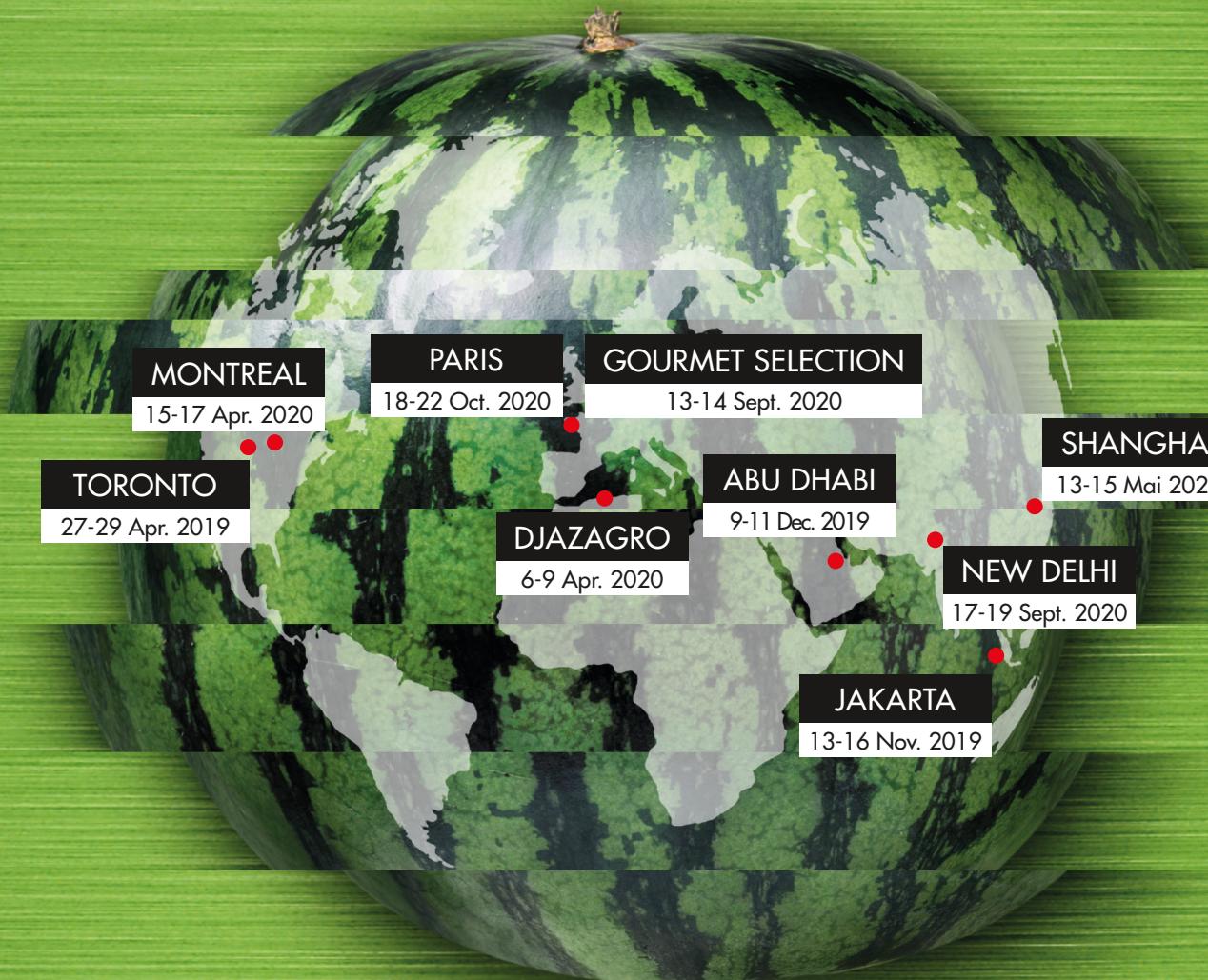
### Artisans-traders / agri-industry professionals

Particularly in France for the former and above all in China for the latter.



INSPIRE FOOD BUSINESS

## JOIN THE WORLD NUMBER ONE FOOD INNOVATION NETWORK



COME~~X~~POSITION

SIAL, a subsidiary of Comexposium Group

[WWW.SIAL-NETWORK.COM](http://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

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