ENGLISH

FRANÇAIS

SIAL INSIGHTS

2020

FOOD

CONSUMERS' BEHAVIORS AND EXPECTATIONS

KANTAR
Food 360 2020

EVOLUTION OF THE INNOVATIVE OFFERING

TRENDS AND NEW FOOD CONCEPTS

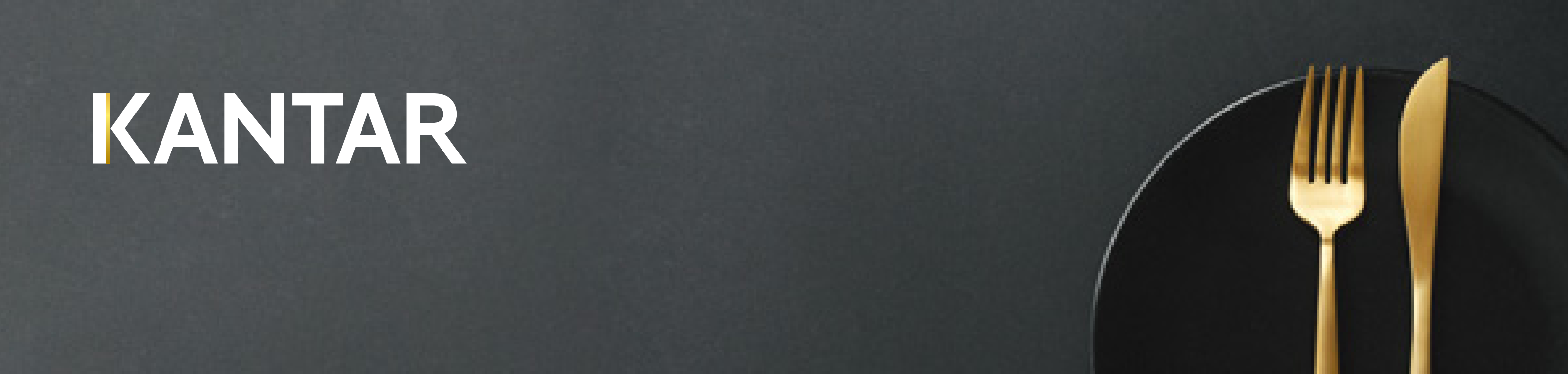
ProtéinesXTC
creative scientists & brand activists

FOOD SERVICES

DATA AND TRENDS

Gira
Construisons la restauration de demain

CLICK TO GO TO PAGE



Food 360 2020

FOOD

CONSUMERS' EXPECTATIONS AND BEHAVIORS

OBJECTIVES

Food 360™ is a multi-country market research conducted every 2 years since 2012 by Kantar France on behalf of SIAL.

This 2020 edition pinpoints the evolution of the consumers' attitudes, behaviors and expectations regarding their food and the different actors of the Food industry. It also highlights the areas of innovation which motivate consumers the most.

METHODOLOGY

FOR EACH COUNTRY

A representative sample of 500 individuals, aged 18 years old and more or 18-55 years old, was used according to the quota method

GEOGRAPHIC SCOPES

– France, Spain, Italy, Germany, UK and USA: nationwide
– Russia: cities with 100,000 inhabitants and more
– China: Tier 1/2/3 cities
– Middle-East (United Arab Emirates, Bahrain, Oman, Qatar and Saudi Arabia), South-East Asia (Malaysia and Indonesia) & India: urban areas

INTERVIEWS ONLINE

from March to May 2020 according to the countries

INTERVIEWS' CONTEXT

Before lockdown
France, Spain, Germany, UK, USA, Middle-East, South-East Asia

After lockdown
Italy, China, India

FOR ALL QUESTIONS **FOOD360@KANTAR.COM**

KANTAR

About Kantar

Kantar is the world's leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else. Combining our expertise in human understanding with advanced technologies, Kantar's 30,000 people help the world's leading organisations succeed and grow.

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

Find out more

https://kantar.com

@Kantar - https://twitter.com/Kantar

THE CONSUMER OWNS THE CHANGE

80%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

78% **Have changed their food consumption** in the past 2 years

25% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4 FOOD CONSUMPTION CHANGES

81% Healthier food

57% More local food

41% Higher attention to food ingredients

34% Higher attention to environmental impact

PERCEPTION FOOD ACTORS CHANGES

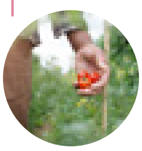
FOR **87%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **88%**
YES SUCCESSFULLY **24%**

Guaranteeing safe and harmless food products **85%**
YES SUCCESSFULLY **21%**

Implementing new and sustainable production methods **83%**
YES SUCCESSFULLY **21%**



MORE SHOULD BE DONE REGARDING...

82% Reducing pollution of air and water
20% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

81% Preserving biodiversity
22% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

81% Reducing over-wrapping
28% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

69%

I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

81%

I prefer to buy food with no artificial colouring, no preservatives or 100% natural

70%

When I have the chance, I eat organic food

ENVIRONMENT

72%

I prefer to buy food with less or recyclable packaging

ETHICS

69%

I prefer to buy fair trade food

FLEXITARISM

44%

I feel guilty about eating meat because of animal suffering

43%

I have reduced or stopped my meat consumption

66%

I wonder about my consumption of meat because of the ethical and environmental consequences

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

59% **FOOD IS A CIVIL ACT,** IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

3/4 **Have changed their food consumption** in the past 2 years

34% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4 FOOD CONSUMPTION CHANGES

64% More local food

63% Healthier food

45% Higher attention to food ingredients

39% Higher attention to environmental impact

PERCEPTION FOOD ACTORS CHANGES

FOR **76%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Providing clear traceability **75%**
YES SUCCESSFULLY **14%**

Preserving heritage and traditional savoir-faire **70%**
YES SUCCESSFULLY **11%**

Reducing over-wrapping **69%**
YES SUCCESSFULLY **9%**

MORE SHOULD BE DONE REGARDING...

89% Fair compensation of farmers and breeders
34% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

88% Reducing pollution of air and water
37% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

88% Implementing new and sustainable production methods
32% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

69%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

68%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

57%
When I have the chance, I eat organic food

ENVIRONMENT

58%
I prefer to buy food with less or recyclable packaging

ETHICS

48%
I prefer to buy fair trade food

FLEXITARISM

48%
I have reduced or stopped my meat consumption

39%
I feel guilty about eating meat because of animal suffering

53%
I wonder about my consumption of meat because of the ethical and environmental consequences

SIAL INSIGHTS

GERMANY

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

69%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

65% **Have changed their food consumption** in the past 2 years

34% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

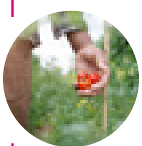
- **57%** Healthier food
- **56%** More local food
- **44%** Higher attention to environmental impact
- **36%** Higher attention to food ingredients

PERCEPTION FOOD ACTORS CHANGES

FOR **74%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

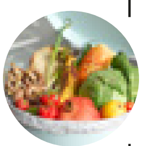
Food safety (handling, preparing and storing) **68%**
YES SUCCESSFULLY **12%**



Implementing new and sustainable production methods **65%**
YES SUCCESSFULLY **8%**

Reducing plastic **63%**
YES SUCCESSFULLY **9%**

MORE SHOULD BE DONE REGARDING...



89% Reducing food waste
45% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

88% Reducing the use of controversial ingredients
41% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

88% Reducing over-wrapping
37% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

68%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

60%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

52%
When I have the chance, I eat organic food

ENVIRONMENT

63%
I prefer to buy food with less or recyclable packaging

ETHICS

42%
I prefer to buy fair trade food

FLEXITARISM

40%
I have reduced or stopped my meat consumption

38%
I feel guilty about eating meat because of animal suffering

52%
I wonder about my consumption of meat because of the ethical and environmental consequences

SIAL INSIGHTS

INDIA

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

74%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

83% **Have changed their food consumption** in the past 2 years

50% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4 FOOD CONSUMPTION CHANGES

78% Healthier food

69% More local food

54% Higher attention to environmental impact

43% Higher attention to food ingredients

PERCEPTION FOOD ACTORS CHANGES

FOR **85%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

MORE SHOULD BE DONE REGARDING...

Food safety (handling, preparing and storing) **84%**

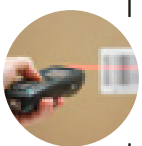
YES SUCCESSFULLY **43%**

63% Reducing pesticides

20% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

Guaranteeing safe and harmless food products **82%**

YES SUCCESSFULLY **37%**

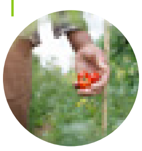


62% Providing clear traceability

19% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

Implementing new and sustainable production methods **82%**

YES SUCCESSFULLY **36%**



60% Reducing over-wrapping

17% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

81%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

82%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

80%
When I have the chance, I eat organic food

ENVIRONMENT

73%
I prefer to buy food with less or recyclable packaging

ETHICS

72%
I prefer to buy fair trade food

FLEXITARISM

36%
I have reduced or stopped my meat consumption

71%
I feel guilty about eating meat because of animal suffering

71%
I wonder about my consumption of meat because of the ethical and environmental consequences

THE CONSUMER OWNS THE CHANGE

73%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

62% **Have changed their food consumption**
in the past 2 years

30% **Have made radical changes**
in favor of ethics, environment or ingredients
(boycott of products, brands...)

TOP 4 FOOD CONSUMPTION CHANGES

- **72%** Healthier food
- **65%** More local food
- **45%** Higher attention to food ingredients
- **40%** Higher attention to environmental impact

environmental impact

PERCEPTION FOOD ACTORS CHANGES

FOR **79%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Providing clear traceability **79%**
YES SUCCESSFULLY **11%**

Food safety (handling, preparing and storing) **77%**
YES SUCCESSFULLY **13%**

Guaranteeing safe and harmless food products **76%**
YES SUCCESSFULLY **10%**

MORE SHOULD BE DONE REGARDING...

92% Fair compensation of farmers and breeders
44% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

91% Reducing pollution of air and water
39% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

90% Preserving biodiversity
35% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

74%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

80%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

64%
When I have the chance, I eat organic food

ENVIRONMENT

71%
I prefer to buy food with less or recyclable packaging

ETHICS

47%
I prefer to buy fair trade food

FLEXITARISM

42%
I have reduced or stopped my meat consumption

40%
I feel guilty about eating meat because of animal suffering

54%
I wonder about my consumption of meat because of the ethical and environmental consequences

MIDDLE EAST

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

THE CONSUMER OWNS THE CHANGE

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

66%

78% **Have changed their food consumption** in the past 2 years

29% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4 FOOD CONSUMPTION CHANGES

71% Healthier food

35% More local food

33% Higher attention to food ingredients

30% Higher attention to environmental impact

PERCEPTION FOOD ACTORS CHANGES

FOR **84%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

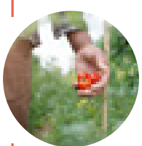
ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **83%**

YES SUCCESSFULLY **37%**

Implementing new and sustainable production methods **82%**

YES SUCCESSFULLY **36%**



Guaranteeing safe and harmless food products **79%**

YES SUCCESSFULLY **33%**

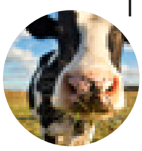
MORE SHOULD BE DONE REGARDING...

67% Reducing pesticides

26% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

66% Reducing the use of controversial ingredients

23% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE



65% Paying more attention to animal welfare

24% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

64%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

77%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

71%
When I have the chance, I eat organic food

ENVIRONMENT

56%
I prefer to buy food with less or recyclable packaging

ETHICS

49%
I prefer to buy fair trade food

FLEXITARISM

33%
I feel guilty about eating meat because of animal suffering

30%
I have reduced or stopped my meat consumption

49%
I wonder about my consumption of meat because of the ethical and environmental consequences

SIAL INSIGHTS

SOUTHEAST ASIA

Indonesia / Malaysia

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

68%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

90% **Have changed their food consumption**
in the past 2 years

40% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

80% Healthier food

61% Higher attention to food ingredients

59% More local food

53% Higher attention to environmental impact

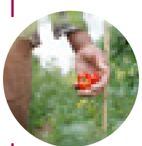
PERCEPTION FOOD ACTORS CHANGES

FOR **94%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

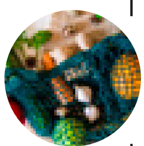
Food safety (handling, preparing and storing) **94%**
YES SUCCESSFULLY **32%**

Implementing new and sustainable production methods **91%**
YES SUCCESSFULLY **32%**



Guaranteeing safe and harmless food products **91%**
YES SUCCESSFULLY **31%**

MORE SHOULD BE DONE REGARDING...



78% Reducing plastic
24% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

78% Reducing food waste
21% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

78% Reducing pollution of air and water
21% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

75%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

86%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

83%
When I have the chance, I eat organic food

ENVIRONMENT

78%
I prefer to buy food with less or recyclable packaging

ETHICS

74%
I prefer to buy fair trade food

FLEXITARISM

38%
I have reduced or stopped my meat consumption

41%
I feel guilty about eating meat because of animal suffering

65%
I wonder about my consumption of meat because of the ethical and environmental consequences

THE CONSUMER OWNS THE CHANGE

69%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

71% **Have changed their food consumption** in the past 2 years

41% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

- **83%** Healthier food
- **63%** More local food
- **56%** Higher attention to food ingredients
- **38%** Higher attention to environmental impact

PERCEPTION FOOD ACTORS CHANGES

FOR **81%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **80%**
YES SUCCESSFULLY **17%**

Guaranteeing safe and harmless food products **79%**
YES SUCCESSFULLY **20%**

Implementing new and sustainable production methods **72%**
YES SUCCESSFULLY **13%**

MORE SHOULD BE DONE REGARDING...

86% Reducing pollution of air and water
34% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

84% Reducing over-wrapping
38% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

84% Reducing the use of controversial ingredients
34% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

72%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

81%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

55%
When I have the chance, I eat organic food

ENVIRONMENT

77%
I prefer to buy food with less or recyclable packaging

ETHICS

58%
I prefer to buy fair trade food

FLEXITARISM

33%
I feel guilty about eating meat because of animal suffering

40%
I have reduced or stopped my meat consumption

42%
I wonder about my consumption of meat because of the ethical and environmental consequences

THE CONSUMER OWNS THE CHANGE

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

63%

75% **Have changed their food consumption** in the past 2 years

27% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

- **68%** Healthier food
- **60%** More local food
- **50%** Higher attention to food ingredients
- **22%** Higher attention to environmental impact

PERCEPTION FOOD ACTORS CHANGES

FOR **76%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **70%**
YES SUCCESSFULLY **11%**

Exploiting new supply sources **69%**
YES SUCCESSFULLY **14%**

Preserving heritage and traditional savoir-faire **64%**
YES SUCCESSFULLY **12%**

MORE SHOULD BE DONE REGARDING...

91% Reducing pollution of air and water
50% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

91% Guaranteeing safe and harmless food products
35% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

89% Reducing the use of controversial ingredients
49% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

65%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

71%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

82%
When I have the chance, I eat organic food

ENVIRONMENT

47%
I prefer to buy food with less or recyclable packaging

ETHICS

51%
I prefer to buy fair trade food

FLEXITARISM

32%
I have reduced or stopped my meat consumption

33%
I feel guilty about eating meat because of animal suffering

30%
I wonder about my consumption of meat because of the ethical and environmental consequences

SIAL INSIGHTS

UNITED KINGDOM

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

34%

62% **Have changed their food consumption** in the past 2 years

25% **Have made radical changes** in favor of ethics, environment or ingredients (boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

61% Healthier food

33% Higher attention to food ingredients

30% Higher attention to environmental impact

29% More local food

PERCEPTION FOOD ACTORS CHANGES

FOR **77%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **79%**

YES SUCCESSFULLY **18%**

Guaranteeing safe and harmless food products **79%**

YES SUCCESSFULLY **14%**

Paying more attention to animal welfare **73%**

YES SUCCESSFULLY **14%**

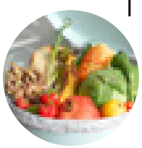
MORE SHOULD BE DONE REGARDING...

87% Reducing overwrapping

34% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

86% Preserving biodiversity

29% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE



85% Reducing food waste

30% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

47%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

55%
I prefer to buy food with no artificial colouring, no preservatives or 100% natural

33%
When I have the chance, I eat organic food

ENVIRONMENT

62%
I prefer to buy food with less or recyclable packaging

ETHICS

40%
I prefer to buy fair trade food

FLEXITARISM

42%
I feel guilty about eating meat because of animal suffering

33%
I have reduced or stopped my meat consumption

45%
I wonder about my consumption of meat because of the ethical and environmental consequences

SIAL INSIGHTS

UNITED STATES

KANTAR
Food 360 2020

THE CONSUMER OWNS THE CHANGE

37%

FOOD IS A CIVIL ACT, IT IS CHOOSING THE WORLD WE WANT TO LIVE IN

63% **Have changed their food consumption**
in the past 2 years

19% **Have made radical changes**
in favor of ethics, environment or ingredients
(boycott of products, brands...)

TOP 4
FOOD CONSUMPTION CHANGES

63% Healthier food

36% Higher attention to food ingredients

28% More local food

20% Higher attention to environmental impact

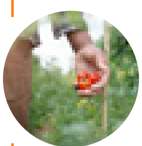
PERCEPTION FOOD ACTORS CHANGES

FOR **72%** ACTIONS HAVE BEEN UNDERTAKEN BY FOOD ACTORS **TO IMPROVE THE QUALITY OF FOOD PRODUCTS**

ACKNOWLEDGED EFFORTS REGARDING...

Food safety (handling, preparing and storing) **77%**
YES SUCCESSFULLY **22%**

Implementing new and sustainable production methods **69%**
YES SUCCESSFULLY **18%**

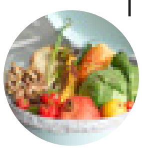


Guaranteeing safe and harmless food products **68%**
YES SUCCESSFULLY **15%**

MORE SHOULD BE DONE REGARDING...

80% Reducing pollution of air and water
29% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

77% Fair compensation of farmers and breeders
43% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE



77% Reducing food waste
35% NO EFFORT HAS BEEN DONE AND IT SHOULD BE DONE

CONSUMERS' TRENDS

LOCAL

56%
I prefer to buy food products made in my region or nearby

NATURALITY & ORGANIC

57%
I prefer to buy food with no artificial coloring, no preservatives or 100% natural

43%
When I have the chance, I eat organic food

ENVIRONMENT

50%
I prefer to buy food with less or recyclable packaging

ETHICS

38%
I prefer to buy fair trade food

FLEXITARISM

27%
I have reduced or stopped my meat consumption

39%
I feel guilty about eating meat because of animal suffering

46%
I wonder about my consumption of meat because of the ethical and environmental consequences

ProtéinesXTC
creative scientists & brand activists

EVOLUTIONS OF THE INNOVATIVE OFFERING

TRENDS AND NEW FOOD CONCEPTS

About ProtéinesXTC

ProtéinesXTC is today the leading consulting firm in strategy and communication specialized in the Food industry.

From product innovation to brand strategy and BtoB communication, ProtéinesXTC is able to respond throughout the value chain to the issues and challenges of society of food decision-makers and thus be in line with the increasingly strong demands of consumers.

WHAT MAKES THE UNIQUENESS OF PROTÉINESXTC

Women and men who are recognized experts in the sector: scientists, communicators, prospectivists, socioeconomists, etc. who make ProtéinesXTC an unrivalled platform of expertise.

Complementary expertise at a high level of competence: monitoring and prospective studies, scientific consulting, innovation workshop, brand and content strategy, crisis prevention and management, public relations.

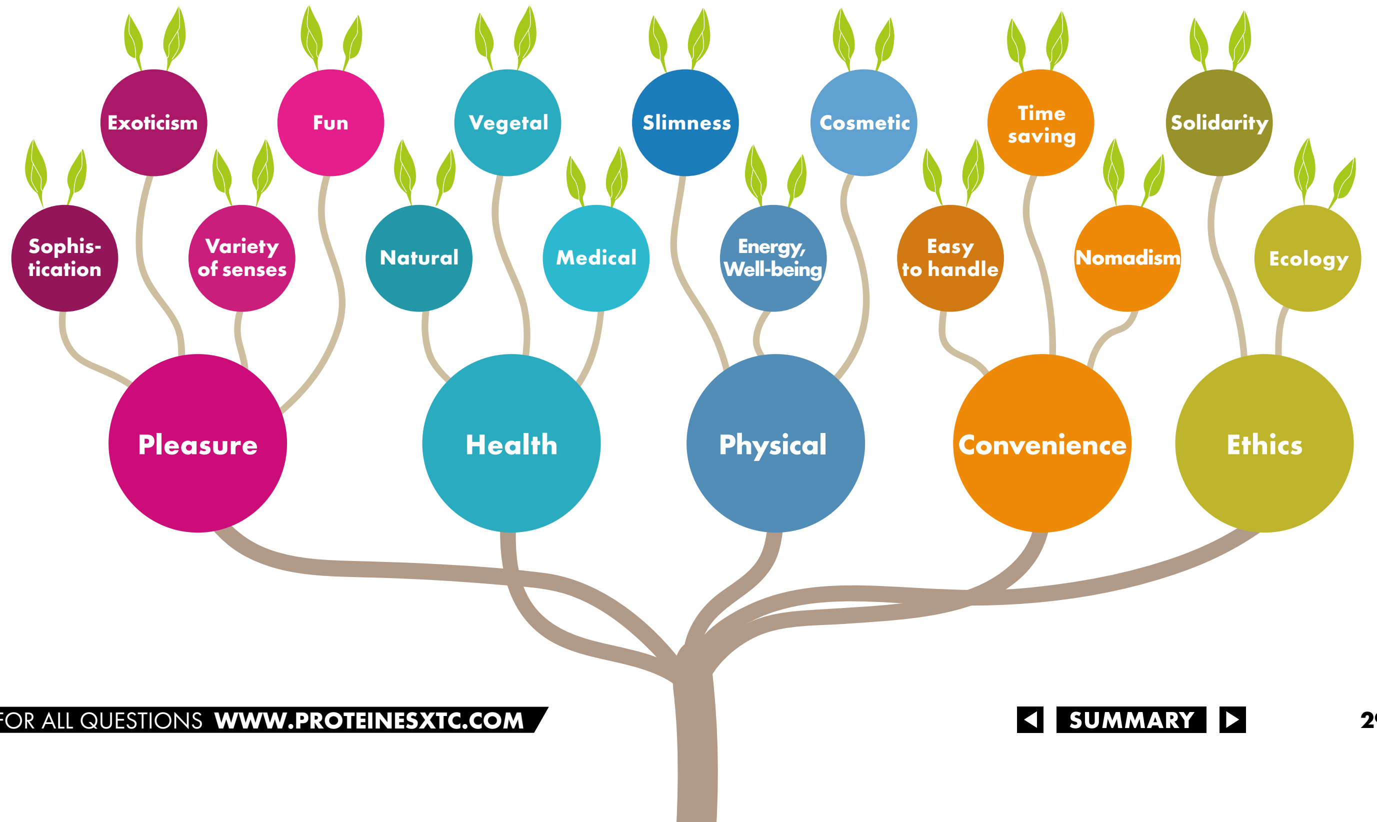
Exclusive and unique proprietary tools: "L'Essentiel", a daily scientific monitoring on food, health and environment issues. Inspire Database, the world's first database of food innovations (products, recipes, packaging, positioning, etc.).

A perfect mastery of all the new communication tools and technologies.
25 years of recognized expertise at the service of food and innovation.

SIAL'S PARTNER

ProtéinesXTC, has been the Sial Network's Innovation Partner since 1996.

The "Trend Tree", created by ProtéinesXTC, is a hierarchical model that synthesizes all consumer expectations in five axes, breaks them down into new offering trends and lists the new levers used by manufacturers around the world to respond to these expectations. This exclusive segmentation is also used by our analysts to qualify all the innovations that integrate Inspire Database, and therefore the evolutions of the global offer that we present here.



FOOD INNOVATION IN 2019 TOTAL FOOD

	CHINA	WORLD
Variety of senses	50,5%	29,0%
Sophistication	17,7%	15,7%
Medical	11,6%	8,7%
Natural	5,6%	15,0%
Easy to handle	4,5%	4,9%
Energy, Well-being	3,5%	3,6%
Time saving	2,0%	1,6%
Fun	1,5%	2,1%
Vegetal	1,0%	8,7%
Slimness	1,0%	2,9%
Ecology	0,5%	3,9%
Nomadism	0,5%	0,9%
Exoticism	0%	1,8%
Solidarity	0%	0,9%
Cosmetic	0%	0,3%

REPARTITION

CHINA   MONDE

69,7% 48,7% PLEASURE

18,2% 32,4% HEALTH

7,1% 7,4% CONVENIENCE

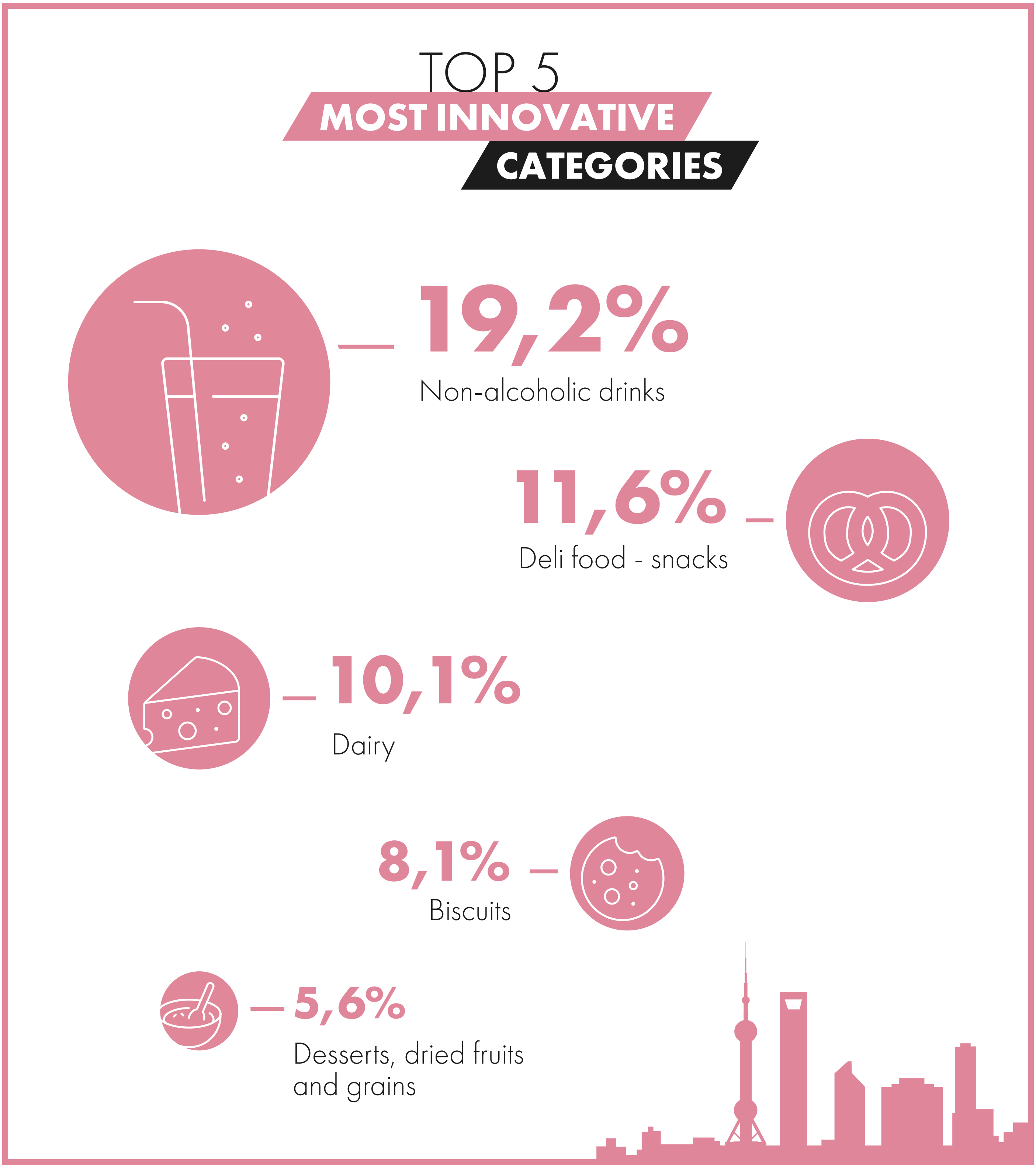
4,5% 6,8% PHYSICAL

0,5% 4,8% ETHICS

Food innovation in China remains strongly focused on "Pleasure" values (nearly 7 out of 10 innovations in 2019 vs. 5 out of 10 for the world average). Above all, it is an offer that plays on the Variety of senses (new tastes, textures, etc.) and meets the Chinese consumer's desire to discover new experiences.

They are also premium products with a sophisticated character that are highly appreciated in China.

On the other hand, Naturalness is under-represented in food innovation in China compared to other regions of the world (Europe, North America). It is also worth noting the low number of plant substitutes and new food products that highlight ethical benefits (ecology, solidarity).



ProtéinesXTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

	FRANCE	WORLD
Variety of senses	25,3%	29,0%
Natural	22,7%	15,0%
Sophistication	20,8%	15,7%
Easy to handle	5,0%	4,9%
Ecology	5,0%	3,9%
Vegetal	4,8%	8,7%
Medical	4,7%	8,7%
Fun	2,4%	2,1%
Exoticism	2,0%	1,8%
Slimness	1,7%	2,9%
Time saving	1,7%	1,6%
Energy, Well-being	1,6%	3,6%
Solidarity	1,4%	0,9%
Nomadism	0,7%	0,9%
Cosmetic	0,1%	0,3%

REPARTITION

FRANCE MONDE

FRANCE	MONDE	
50,5%	48,7%	PLEASURE
32,1%	32,4%	HEALTH
7,5%	7,4%	CONVENIENCE
3,4%	6,8%	PHYSICAL
6,4%	4,8%	ETHICS

In France, Pleasure dominates in 2019 with a strong trend for Variety of senses and Sophistication. The latter is a major leverage of pleasure in France. There are outstanding products with premium ingredients, but also more ordinary products that become premium with the use of a luxurious ingredient, from a specific place, or in a sophisticated packaging.

Over the years, the Naturalness trend has been growing. In 2019, it is the second trend and represents more than a fifth of the innovative offer with a growth of organic products and a simplification of recipes.

The Ethics trend is particularly dynamic in the innovative offer where we can find many products that promote a fair price for farmers and producers, animal welfare, charitable donations or a sustainable packaging.

TOP 5 MOST INNOVATIVE CATEGORIES

7,8%
Meat, poultry, cold cuts

7%
Savoury frozen products

6,8%
Ready made meals

5,9%
Non-alcoholic drinks

4,7%
Dairy

SIAL INSIGHTS

GERMANY

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

	GERMANY	WORLD
Variety of senses	28,2%	29,0%
Natural	12,2%	15,0%
Sophistication	12,2%	15,7%
Vegetal	11,8%	8,7%
Medical	8,7%	8,7%
Ecology	6,6%	3,9%
Energy, Well-being	6,6%	3,6%
Easy to handle	4,5%	4,9%
Nomadism	2,8%	0,9%
Fun	1,7%	2,1%
Slimness	1,7%	2,9%
Exoticism	1,4%	1,8%
Time saving	0,7%	1,6%
Cosmetic	0,3%	0,3%
Solidarity	0,3%	0,9%

REPARTITION

GERMANY | MONDE

43,6% 48,7% PLEASURE

32,8% 32,4% HEALTH

8,7% 6,8% PHYSICAL

8,0% 7,4% CONVENIENCE

7,0% 4,8% ETHICS

German innovation is focused around Pleasure and Health. The Vegetal trend is superior compared to the world average, with a majority of ready-made meal and vegan protein drinks composed of legumes such as soybeans and peas.

While the Naturalness trend has been very dynamic in recent years, it only accounts for about one tenth of the innovative offer in Germany in 2019.

Ecology is also a growing trend with products that are more respectful of animal welfare and innovative ecological packaging.

TOP 5 MOST INNOVATIVE CATEGORIES

14,2%
Non-alcoholic drinks

7,6%
Savoury frozen products

7,6%
Dairy

5,6%
Fresh non-dairy products

5,2%
Carbohydrates, pasta, rice

FOOD INNOVATION IN 2019 TOTAL FOOD

	INDIA	WORLD
Variety of senses	25,4%	29,0%
Medical	18,3%	8,7%
Sophistication	14,1%	15,7%
Easy to handle	11,3%	4,9%
Natural	9,9%	15,0%
Energie, Bien-être	8,5%	3,6%
Vegetal	7,0%	8,7%
Slimness	4,2%	2,9%
Solidarity	1,4%	0,9%
Ecology	0%	3,9%
Fun	0%	2,1%
Exoticism	0%	1,8%
Time saving	0%	1,6%
Nomadism	0%	0,9%
Cosmetic	0%	0,3%

REPARTITION

INDIA | MONDE

	INDIA	MONDE
PLEASURE	39,4%	48,7%
HEALTH	35,2%	32,4%
PHYSICAL	12,7%	6,8%
CONVENIENCE	11,3%	7,4%
ETHICS	1,4%	4,8%

In India, food innovation is mainly focused on Pleasure and Health. Variety of senses and Sophistication trends are embodied by sweet products with original tastes and textures for the former, and with ingredients that are more upscale due to their origin or quality for the latter.

The dynamism of the Health axis is largely due to the Medical trend (more than double the world average). It includes many products with functional ingredients such as moringa or other ingredients known for their health benefits like amaranth or turmeric.

In 2019, there is a significant Convenience axis which is exclusively composed of easy to handle offer, with formats that are more practical and easier to use.

TOP 5 MOST INNOVATIVE CATEGORIES

19,7% Non-alcoholic drinks

7% Deli food - snacks

7% Jam / fruits in syrup / spread

5,6% Biscuits

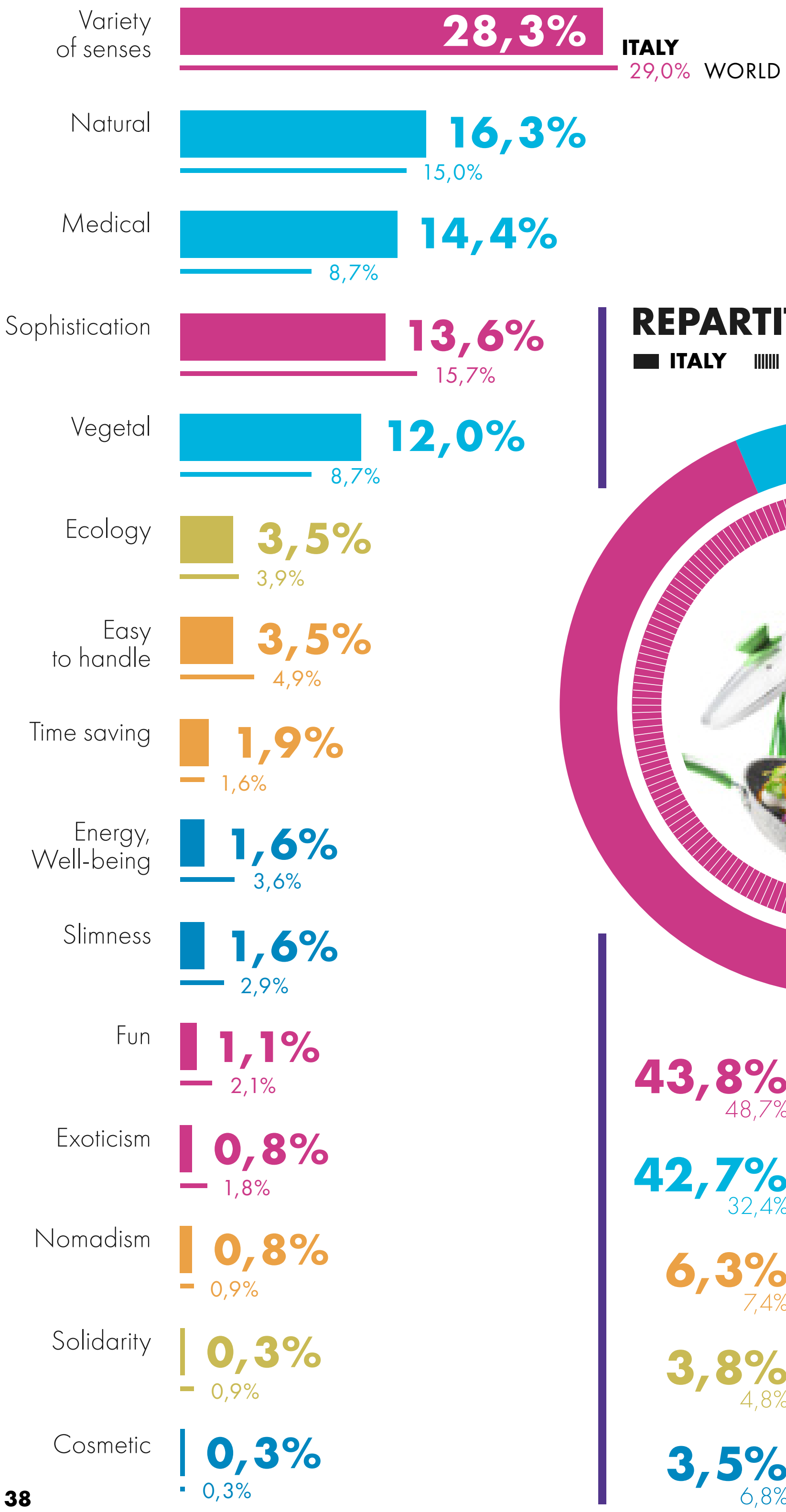
5,6% Cereals

SIAL INSIGHTS

ITALY

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD



REPARTITION

ITALY MONDE

43,8% 48,7% PLEASURE

42,7% 32,4% HEALTH

6,3% 7,4% CONVENIENCE

3,8% 4,8% ETHICS

3,5% 6,8% PHYSICAL

Pleasure is the main axis of the innovative offer in Italy, neck and neck with Health axis. On the Pleasure axis, the offer is structured around a diversification of tastes with unusual products or combinations of ingredients.

Health axis, leaded by Naturalness, Vegetal and Medical trends; is composed of many vegan products with healthy meat substitutes and with nutritional benefits (rich in fibers, proteins...) for a wide variety of products.

TOP 5 MOST INNOVATIVE CATEGORIES

10,6% Carbohydrates, pasta, rice

9,5% Deli food - snacks

9,2% Non-alcoholic drinks

7,1% Ready made meals

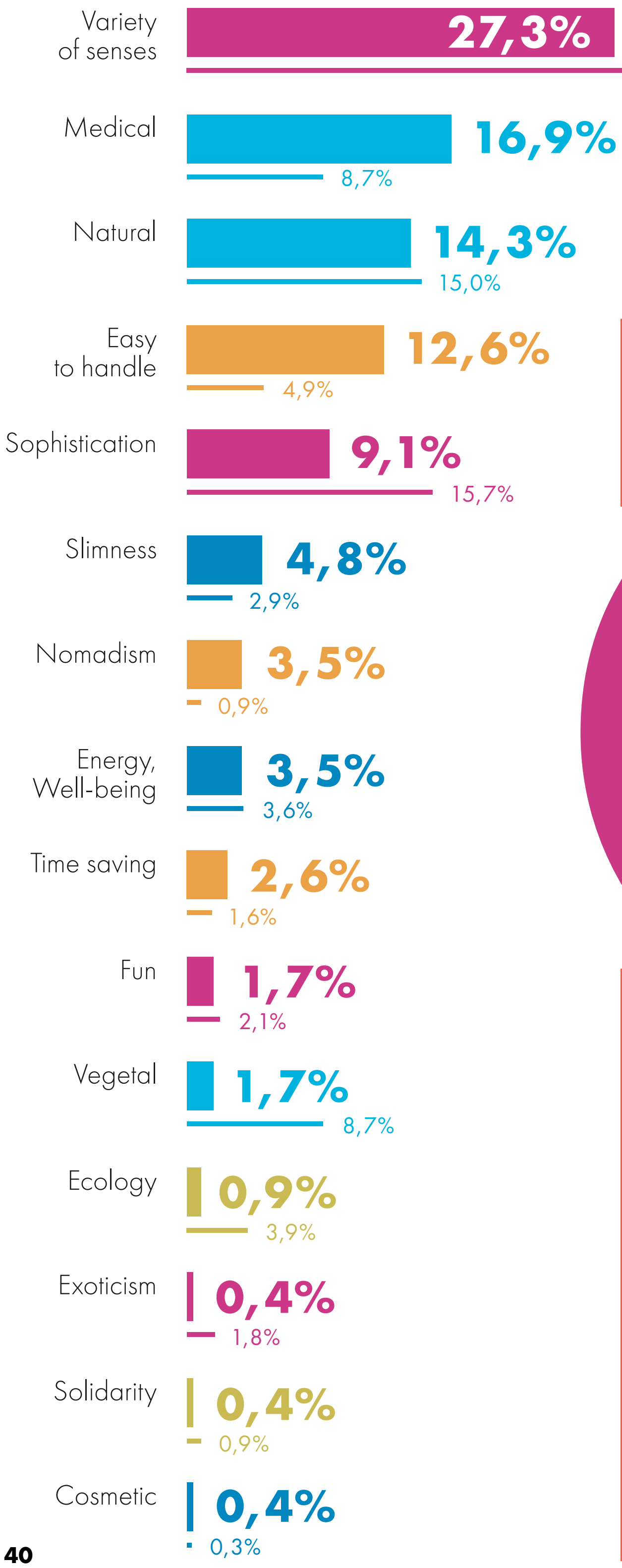
6,3% Condiments and sauces

SIAL INSIGHTS

MAGHREB AND MIDDLE EAST

ProtéinesXTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD



REPARTITION

MAGHREB AND MIDDLE EAST | MONDE

38,5% 48,7% PLEASURE

32,9% 32,4% HEALTH

18,6% 7,4% CONVENIENCE

8,7% 6,8% PHYSICAL

1,3% 4,8% ETHICS

The innovative offer in the Maghreb and the Middle East in 2019 is mainly focused around Pleasure.

The Health trend is increasingly dynamic with a product offer that highlights health benefits, usually supplemented with proteins, nutrients or other functional ingredients. Medical has thus become the second most important trend in this part of the world.

Compared to the world average, Practicality is a strong trend with products that are easier to handle, many of which make cooking easier.

Please note: The statistical rules do not allow us a breakdown of axes/trends over a single year for the Maghreb Middle East region. We have chosen to propose this breakdown over the last five years.

TOP 5 MOST INNOVATIVE CATEGORIES

10%
Jam / fruits in syrup / spread

10%
Mineral water

8%
Desserts, dried fruits and seeds

8%
Salts, peppers and spices

8%
Fresh non-dairy products

SIAL INSIGHTS

SOUTHEAST ASIA

ProtéinesXTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

	SOUTHEAST ASIA	WORLD
Variety of senses	31,8%	29,0%
Medical	17,8%	8,7%
Slimness	10,3%	2,9%
Sophistication	10,3%	15,7%
Energy, Well-being	7,5%	3,6%
Vegetal	6,5%	8,7%
Easy to handle	4,7%	4,9%
Natural	3,7%	15,0%
Ecology	2,8%	3,9%
Solidarity	1,9%	0,9%
Cosmetic	0,9%	0,3%
Nomadism	0,9%	0,9%
Time saving	0,9%	1,6%
Exoticism	0%	1,8%
Fun	0%	2,1%

REPARTITION

SOUTHEAST ASIA MONDE

42,1% 48,7% PLEASURE

28,0% 32,4% HEALTH

18,7% 6,8% PHYSICAL

6,5% 7,4% CONVENIENCE

4,7% 4,8% ETHICS

The 2019 Southeast Asia innovative offer is focused on Pleasure with a high tendency for Variety of senses (almost a third of new products).

The Health axis is the second most dynamic axis with a food innovation mainly focused on functional benefits (over double the world average). This includes food products enriched with vitamins, probiotics, low in calories or rich in fibers.

The highest number of innovative products in the Physical sector is in this part of the world, almost 3 times more than the world average. This offer is mainly represented by slimming and wellness products, particularly in the beverage's category: products low in sugar, fat or high in fiber.

TOP 5 MOST INNOVATIVE CATEGORIES

15,9%
Non-alcoholic drinks

11,2%
Deli food - snacks

8,4%
Savoury frozen products

5,6%
Condiments and sauces

5,6%
Dairy

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

	SPAIN	WORLD
Variety of senses	32,6%	29,0%
Sophistication	13,8%	15,7%
Natural	12,3%	15,0%
Vegetal	10,1%	8,7%
Medical	8,3%	8,7%
Easy to handle	6,9%	4,9%
Energy, Well-being	4,3%	3,6%
Time saving	3,3%	1,6%
Fun	2,5%	2,1%
Ecology	2,2%	3,9%
Slimness	1,8%	2,9%
Nomadism	1,1%	0,9%
Exoticism	0,7%	1,8%
Solidarity	0%	0,9%
Cosmetic	0%	0,3%

REPARTITION

SPAIN | MONDE

49,6% 48,7% PLEASURE

30,8% 32,4% HEALTH

11,2% 7,4% CONVENIENCE

6,2% 6,8% PHYSICAL

2,2% 4,8% ETHICS

Spain's innovative offer in 2019 is focused around Pleasure with the Variety of senses trend but also Sophistication which has been growing for two years.

In 2019, Health is the second most significant axis with Natural as the leading trend. There are many organic products in particular in the grocery category.

Practicality is still above the world average, with products that are easy to handle, practical and perfect for on-the-go, and save consumer time.

TOP 5 **MOST INNOVATIVE CATEGORIES**

9% Savoury frozen products

9% Deli food - snacks

8,3% Biscuits

7,2% Non-alcoholic drinks

6,5% Meat, poultry, cold cuts

SIAL INSIGHTS

RUSSIA

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

	RUSSIA	WORLD
Variety of senses	27,5%	29,0%
Natural	17,5%	15,0%
Sophistication	15,0%	15,7%
Slimness	10,0%	2,9%
Nomadism	5,0%	0,9%
Fun	5,0%	2,1%
Easy to handle	5,0%	4,9%
Medical	5,0%	8,7%
Time saving	2,5%	1,6%
Exoticism	2,5%	1,8%
Ecology	2,5%	3,9%
Vegetal	2,5%	8,7%
Energy, Well-being	0%	3,6%
Solidarity	0%	0,9%
Cosmetic	0%	0,3%

REPARTITION

RUSSIA MONDE

50,0% 48,7% PLEASURE

25,0% 32,4% HEALTH

12,5% 7,4% CONVENIENCE

10,0% 6,8% PHYSICAL

2,5% 4,8% ETHICS

The innovative offer in Russia is dominated by the Pleasure axis representing 50% of the innovative offer. The offer of organic and natural products remains in 2019 the second most important trend.

The Slimness trend is significantly higher compared to the global offer, consisting essentially of fat-free or no added sugar products.

TOP 5 MOST INNOVATIVE CATEGORIES

12,5%
Dairy

10%
Desserts, dried fruits and seeds

10%
Condiments and sauces

10%
Ready made meals

7,5%
Deli food - snacks

SIAL INSIGHTS

UNITED KINGDOM

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD

UNITED KINGDOM
29,0% WORLD

	UNITED KINGDOM	WORLD
Variety of senses	28,9%	29,0%
Vegetal	13,7%	8,7%
Medical	11,9%	8,7%
Sophistication	11,6%	15,7%
Energy, Well-being	5,9%	3,6%
Easy to handle	5,4%	4,9%
Natural	4,7%	15,0%
Slimness	4,3%	2,9%
Exoticism	3,9%	1,8%
Fun	3,7%	2,1%
Ecology	3,2%	3,9%
Time saving	1,0%	1,6%
Nomadism	0,8%	0,9%
Solidarity	0,6%	0,9%
Cosmetic	0,3%	0,3%

REPARTITION

UNITED KINGDOM   MONDE

	UNITED KINGDOM	MONDE	
	48,1%	48,7%	PLEASURE
	30,3%	32,4%	HEALTH
	10,5%	6,8%	PHYSICAL
	7,3%	7,4%	CONVENIENCE
	3,9%	4,8%	ETHICS

The United Kingdom innovative offer in 2019 is dominated by the Pleasure trend; the new product offer has well-thought flavors and unusual ingredients combinations.

The Health trend is refreshed particularly with the increase of the vegetal products which become the second innovation trend in 2019. The Medical trend rank third with the development of products rich in nutrients or for the digestive system.

Note that Naturalness is not a priority direction for innovation (three times less than the world average). This trend, already commonplace in the United Kingdom, today does not set any products apart.

The Physical axis is particularly dynamic in the UK in 2019. The Well-being and Slimness trends stand out with, for the latter, a very large offer of products that are low in sugar and/or in calories.

TOP 5 MOST INNOVATIVE CATEGORIES

9,1%
Non-alcoholic drinks

8,8%
Ready made meals

7,4%
Deli food - snacks

6%
Dairy

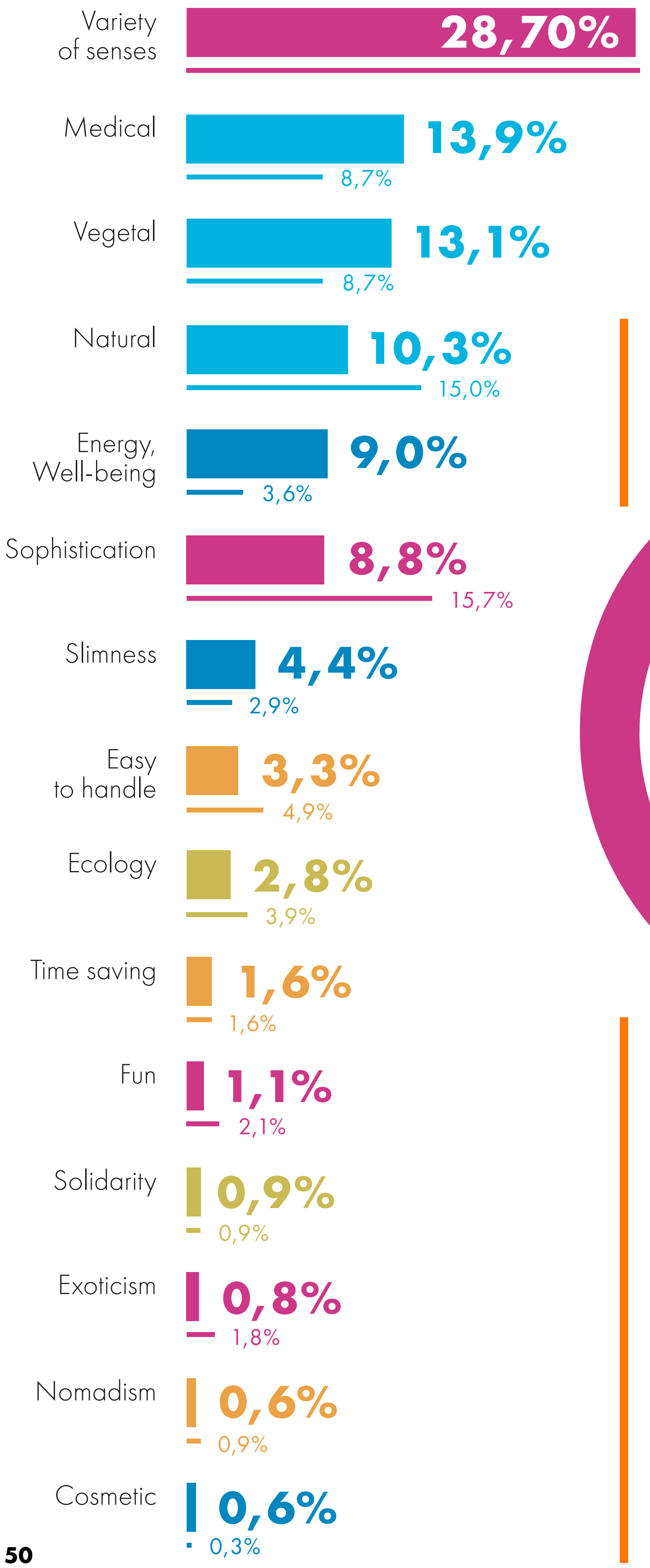
5,3%
Alcoholic beverages & appetizers

SIAL INSIGHTS

UNITED STATES

Protéines XTC
creative scientists & brand activists

FOOD INNOVATION IN 2019 TOTAL FOOD



UNITED STATES
29,0% WORLD

REPARTITION

UNITED STATES MONDE

39,4% 48,7% PLEASURE

37,2% 32,4% HEALTH

14% 6,8% PHYSICAL

5,5% 7,4% CONVENIENCE

3,8% 4,8% ETHICS

The Health Axis is particularly dynamic in the United States in 2019 and is neck and neck with the Pleasure Axis for first place.

While the Naturalness trend was a powerful leverage in the United States a few years ago it has significantly decreased and is now lower than the world average. It has become commonplace and does not set any products apart today.

The Physical axis is very dynamic in the United States with products for energy and well-being in proportion 3 times higher than the world average. Soft drinks represent a large part of this offer, with products composed of functional ingredients like cannabidiol which is becoming very popular in the United States in 2019.

TOP 5 MOST INNOVATIVE CATEGORIES

10,5%
Non-alcoholic drinks

9,1%
Deli food - snacks

8%
Fresh non-dairy products

6,9%
Savoury frozen products

6%
Dairy

Construisons la restauration de demain

OUT OF HOME

FOOD SERVICES

GLOBAL STUDIES

This year, Gira deciphered catering trends on 11 countries.

Three main themes guided the studies and represent the major trends of the out of home consumption found in the different countries studied:

TRANSPARENCY	Open kitchen, highlights on values, ethics in restaurants
ENVIRONMENT	Waste management, environmental concerns
A NEW WAY TO CONSUME	Digital rise, answers for healthy food expectations and decrease in meat consumption

COMPOSITION OF THESE STUDIES

The first part is dedicated to **figures of the out of home market consumption.** The social-economic data comes from specialized institutes, while data on the catering market comes from companies specialized in the sector of foodservice.

The second part focuses on **consumer habits** and expectations at restaurants.

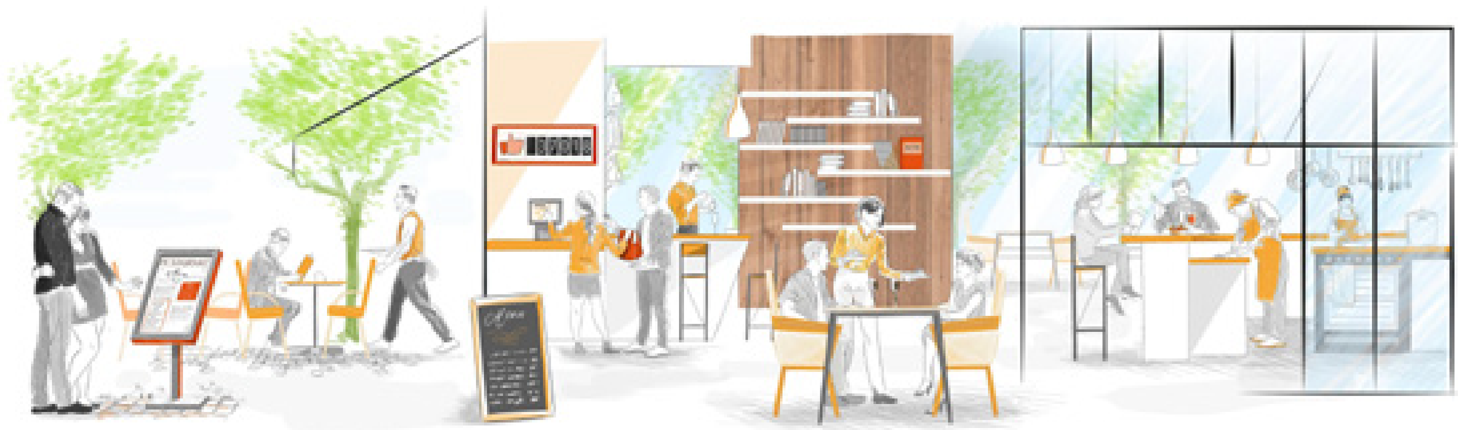
Then, the last part represents a **decryption of concepts**, trends and food within the countries as well as an analysis of the impact of these trends on the catering sector.

THE FOUNDER'S WORD

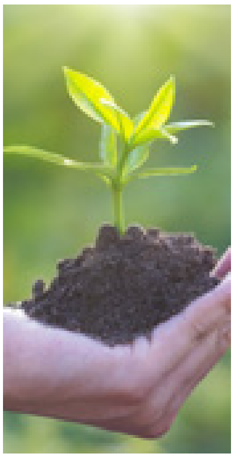
The overview of french food is quickly evolving and customers have new expectations. That's why Gira is eager to gauge the trends and give its expert advice and ideas.

The story of Gira begins in 1989. Since then, we are proud to work with some valuable companies which have been following us for 30 years now! We have continued this journey of a constant dedication to our clients by offering them customised solutions and always guide them through all the steps of their projects.

In fact, our main target is to guide and advise our clients successfully all along their projects. We opened our scope as we advise now, not only professionals of the sector, but everyone who is interested in making business in the restaurant industry. Our greatest assets and the key to our success is our team: our experts are passionate and have a strong experience on the field. Continually watching out for new trends, we analyse the market and the customers' behaviours to be able to anticipate their needs.



FOOD AWARENESS AND A DIGITAL REVIVAL OF THE SECTOR



A SECTOR FOCUSED ON **FOOD SECURITY**

86% of consumers are concerned about the food safety of the products they consume.

Consumers expect quality and safety in restaurants.

Awareness of the relationship between food and health.

PROGRESS STILL POSSIBLE ON THE **ECOLOGICAL FACTOR**

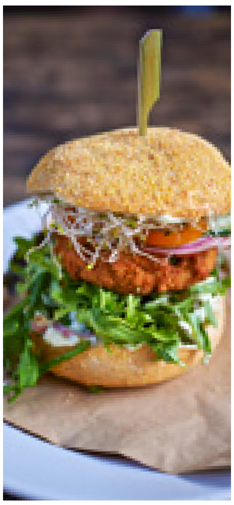
Heavy use of plastic, although some conservators are trying to reduce the amount of plastic used.

Government measures to develop "green" catering industry.

A COUNTRY DEPENDENT ON **IMPORTS**

Beginning of the development of **local production**

Consumer interest i**n organic products** with still some inequalities



THE BOOM OF **VEGETABLE MEAT** CONSUMPTION

A vegetable meat market growing by 14.3% annually since 2014**

AN INNOVATIVE MARKET IN TERMS OF TECHNOLOGY AND **DIGITAL TECHNOLOGY**

Deployment of Meal Delivery and Click&Collect

Development of technological innovations such as robots to transform the customer experience.

Developement of Dark Kitchen in major cities

2016-2019 FOOD SERVICE EVOLUTIONS

+15,9%

Food service
market revenue **717 Bn $**

+36,1%

12 millions restaurants

+14,3%

186 Bn meals served

-10,7%

4,54 $: Average spending
for out-of-home consumption

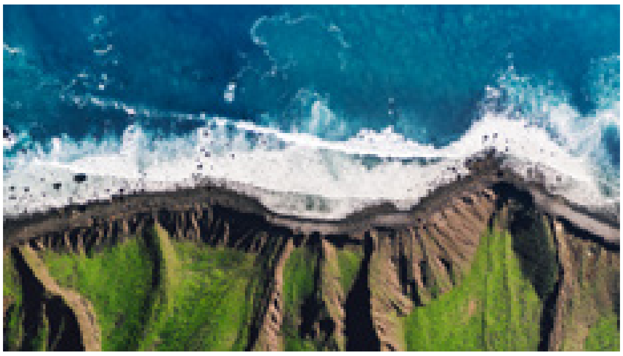
+38 PTS
2%
Chains

+12 PTS
98%
Independents

RESTAURANTS

Sources:
Foodservice figures: Euromonitor – Consumer foodservice in China 2019
* Food & Beverage Consumer Insight in China – IPSOS 2016
* * Plant&Food Research Insitute

DEEP CHANGES FOR MORE COMMITMENT



A SECTOR CHANGING ITS HABITS FOR THE **ENVIRONMENT**

45% of caterers offer organic products

Development of local supplies and focus on producers

61% of French try to limit the impact of their food on the environment

CONFIRMATION OF THE NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT

A strong preference for nationally produced foods and confidence in their government in terms of food safety

Generalized need for information on the origin of products and their potential benefits

Rising of « fast casual » restaurants as an healthy alternative to traditional fast-foods

NEWS WAYS OF **CONSUMPTION**

Strong emergence of digital tools for business owners

Growing use for digital for consumers

Development for some distribution modes:
delivery, click&collect, drive and dark kitchen

Decrease in meat consumption and appearance of substitutes

2016-2019
FOOD SERVICE EVOLUTIONS

+17,9%
Food service
market revenue **87 Bn $**

+12%
284 637 restaurants

+16%
6,9 Bn meals served

+1,6%
12,43 $: Average spending
for out-of-home consumption

+16,4 PTS
32%
Chains

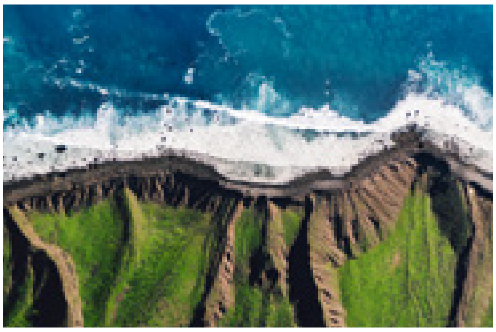
+9,9 PTS
68%
Independents

RESTAURANTS

Sources: Gira 2020

Construisons la restauration de demain

GERMANY IS VERY COMMITTED TO THE RESPECT OF THE ENVIRONMENT



A SECTOR COMMITTED TO THE **ENVIRONMENT** IN TERMS OF WASTAGE

Reduction of food waste by using product in their entirety, reduction of quantities in plates, dedicated applications or donations

Innovative reduction of packaging waste: compost, reusable package, separate trash...

CONFIRMATION OF THE NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT.

Strong development of organic products in restaurants

Consumption of local products: a country that is ahead of the game

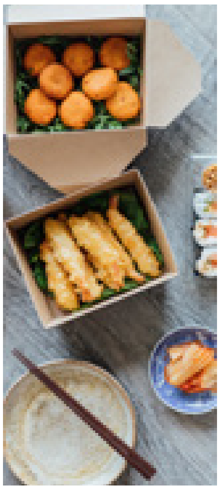
High interest in origin, with natural and simple products

Strong rising of plant-based meat substitutes in restaurants.

NEW WAYS OF CONSUMPTION, DIFFERENT FROM OTHER EUROPEAN COUNTRIES

A real craze for vegetarianism with a decrease in meat consumption in restaurants

2nd market in Europe for plant-based meat substitutes, even in restaurants



AND **2 SPEED DIGITIZATION** OF THE SECTOR

Explosion of delivery and Click&Collect during Covid-19: +245% *

Digital payment requested by customers, but not answered by caterers

2016-2019 FOOD SERVICE EVOLUTIONS

+12,9%

Food service market revenue **46 Bn $**

-0,6%

196 728 restaurants

+11%

4,8 Bn meals served

+1,7%

10,85 $: Average spending for out-of-home consumption

+3,5 PTS

9,5%

Chains

-0,9 PTS

90,5%

Independents

RESTAURANTS

Sources:
Foodservice figures: Euromonitor – Consumer foodservice in Germany 2019
* Flipdish 2019

Construisons la restauration de demain

A FOODSERVICE MARKET DOMINATED BY UNORGANISED POINTS OF SALE

A FOODSERVICE MARKET HAVING TO **ADAPT ITS ACTIONS**

Rising awareness of eco-conscious food habits

Plant-based meat alternatives have stronger prospects compared to clean meat

Efforts made by caterers in terms of food waste

A government regulation in place to reduce plastics, especially in delivery

RISING OF THE NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT

Rising of need of information on products served at the restaurant

Development of **farm to table** concept

Refusal of genetically modified products

DIGITIZATION OF THE RESTAURANT INDUSTRY

Slow development of mobile payment as many Indians don't have bank accounts

Emergence of digital tools for business owners

28 million deliveries per month

A real market of dark kitchens with more than 1 700 kitchens disbributed by the 2 major actors (Zomato and Swiggy)

2016-2019
FOOD SERVICE EVOLUTIONS

+29,1%

Food service market revenue **58 Bn $**

+11,9%

1 732 555 restaurants

+18,1%

77 Bn meals served

+ 9,3%

0,75 $: Average spending for out-of-home consumption

+45 PTS

8%

Chains

+28 PTS

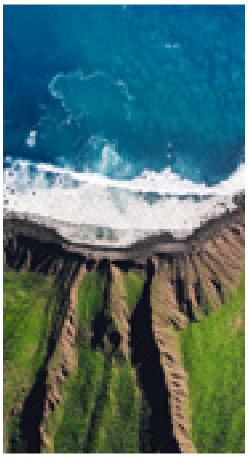
92%

Independents

RESTAURANTS

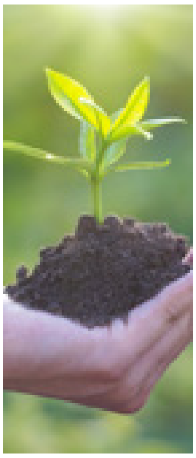
Sources:
Foodservice figures: Euromonitor – Consumer foodservice in India 2019

A CATERING OFFER SHARED BETWEEN TRADITIONALISM AND GLOBAL TRENDS



A SECTOR THAT IS GLOBALLY POORLY COMMITTING TO THE **ENVIRONMENT**

New green trends are emerging in tourist areas and could spread across the country



BUT...

Very little organic products at the restaurant

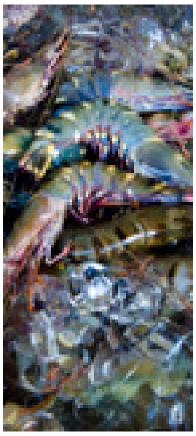
Consuming little meat and local produced food is part of the culture. Most Indonesians cannot afford to buy imported foods.

Indonesia has serious issues in terms of waste management, mainly due to take-away food packaging.

NEW NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT.

New food safety concerns, especially hygiene concerns

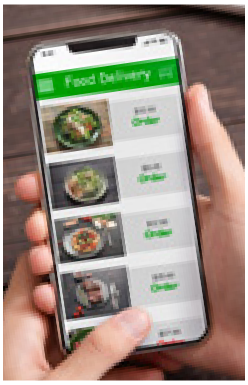
Restaurants in tourist areas are trying to promote a local and responsible offer.



BUT...

Little thought is given to restaurant food in terms of nutritional quality in a country where the overall daily diet remains very balanced

Very few demand on ethical, green or local commitment. Price is what matters first.



EMERGENCE OF THE **DIGITIZATION** OF THE RESTAURANT INDUSTRY

Globaly important use of social networks and review sites.

Take-away food has always been strong in the country. It is now going digital, bringing delivery to the forefront, especially in the largest cities.

BUT...

No cashless in a country where more than 50% of adults do not have a bank account

Digital tools are too onerous for business owners

2016-2019 FOOD SERVICE EVOLUTIONS

+14%
Food service
market revenue **41 Bn $**

+4,4%
213 765 restaurants

+6,8%
6,4 Bn meals served

+6,7%
6,35 $: Average spending
for out-of-home consumption

+3,2 PTS
7%
Chains

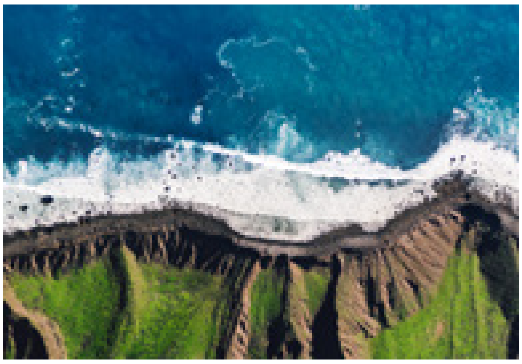
+1,9 PTS
93%
Independents

RESTAURANTS

Sources:
(Global figures : Euromonitor) – FMI – GBG Indonesia

Construisons la restauration de demain

ITALIANS CATERERS ARE INCREASINGLY COMMITTED TO THEIR OFFER, WHETHER IN TERMS OF PRODUCTS OR RECIPES

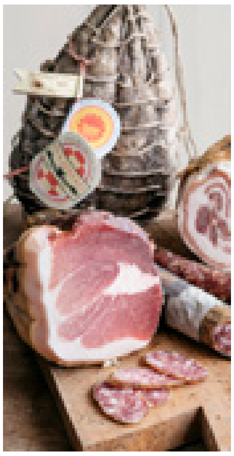


AN EFFORT TO **RESPECT THE ENVIRONMENT** IS GROWING IN RESTAURANTS

Search for **local and seasonal products**

76% believe that today restaurants are careful to offer customers alternatives of dishes considered healthier

6% of Italians are vegetarians and 0.9% are vegans**. But meat consumption isn't reducing in restaurants. And plant-based meat substitutes only begin to take some market shares.

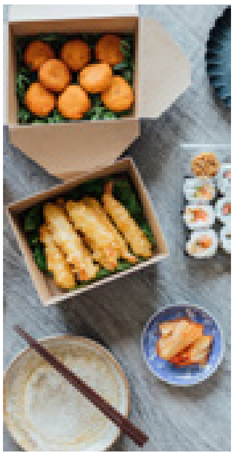


ITALIANS ARE MORE **RESPECTFUL** FOR PRODUCTS BUT ALSO FOR PEOPLE BEHIND THEM AND THEIR WORK.

Italian origin is the first criterion for selecting a product

CONSUMERS EXPRESS THEIR DESIRE FOR **HEALTHY** AND **SUSTAINABLE** PRODUCTS

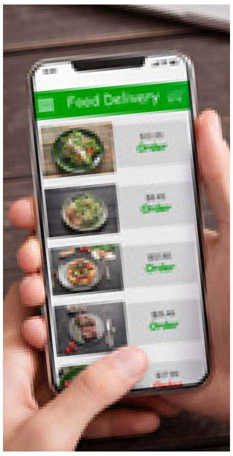
Pleasure is still the most important reason to eat out, but they look for healthy dishes



CATERING GROWS **OUTSIDE ITS WALLS** ...

Appearance of **Dark Kitchen** in Milan and Rome. Development is expected to increase in the next 5 years.

The **online food delivery market** represents 590 million Euros via platforms. Majority of users are from north of Italy (65%)*



... AND **DIGITAL** ENTERS ITALIANS' WAY OF LIFE

And digital enters Italians' way of life but not with payment

Before COVID-19, the use of cash for payment was around 86%***. However payment without contact is becoming a source of security

2016-2019 FOOD SERVICE EVOLUTIONS

+2,5%
Food service
market revenue **89 Bn $**

-1,7%
332 937 restaurants

-2,4%
10,7 Bn meals served

+4,8%
8,36 $: Average spending
for out-of-home consumption

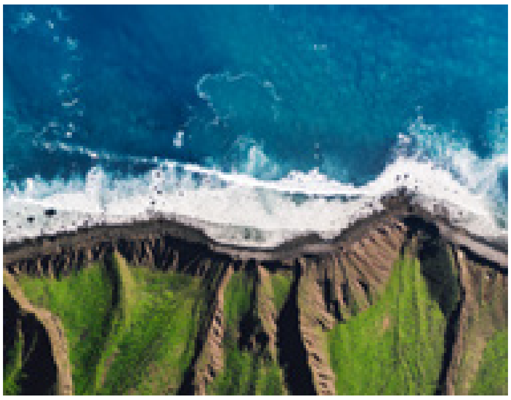
+5 PTS
3%
Chains

-2 PTS
97%
Independents

RESTAURANTS

Sources:
Foodservice figures: FIPE & Euromonitor
* FIPE 2018
** Eurispes 2018
*** European Central Bank

SPANISH RESTAURANT SECTOR GOES GREEN WITH STRONG DEMAND FOR ORGANIC PRODUCTS AND ENVIRONMENTAL ENGAGEMENT



CATERING IS INVOLVED FOR THE **ENVIRONMENT**

Reducing waste and plastic in restaurants with government campaigns such as "More Food, Less Waste".

Shorter supply chains and more local supplier.

The demand for organic products in the catering sector is increasing strongly, driven by a young population (30% of Spanish organic consumers are under 35 years old)*.

AWARENESS OF SPANISH PEOPLE FOR THE RELATIONSHIP BETWEEN **FOOD AND HEALTH**.

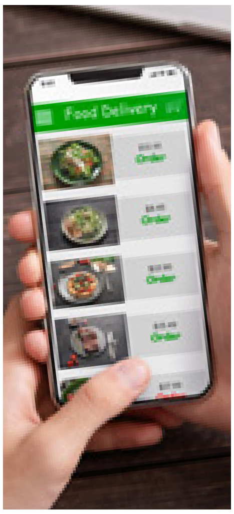
The demand is for healthier products, lower in fat and sugar.

Vegetarian and flexitarian diets are developing slowly (6.3% vegetarians and 1.3% vegans)**.

A MASSIVE USE OF **DIGITAL** IN CATERING INDUSTRY

Development of ordering and payment applications within restaurants.

Artificial intelligence is making its entry into the catering sector with actors such as Beesniss.



DISTRIBUTION CHANNELS ARE DEVELOPING THANKS TO **DIGITAL**

Delivery is growing and particularly affects the millennials.

66% of Spanish people used a delivery service at least once in 2018***.

Development of the Dark Kitchens in the main Spanish cities.

2016-2019

FOOD SERVICE EVOLUTIONS

+4,4%

Food service market revenue **81 Bn $**

+0,1%

275 083 restaurants

+7,6%

10,5 Bn meals served

-0,8%

8,8 $: Average spending for out-of-home consumption

+10,5 PTS

5%

Chains

+0,1 PTS

95%

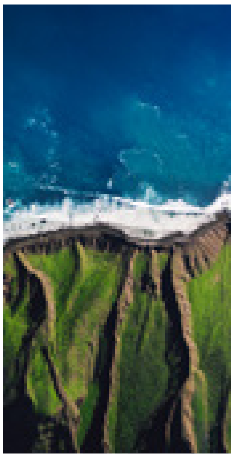
Independents

RESTAURANTS

Sources:
Foodservice figures: Euromonitor – Consumer foodservice in Spain 2019
* Organic Food Iberia
* * Lantern, « The Green Revolution: Understanding the Veggie Revolution"
* * * Kantar World Panel

Gira
Construisons la restauration de demain

A CATERING OFFER THAT DEVELOPS MAINLY IN LARGE CITIES AND WHICH FOLLOWS GLOBAL TRENDS AT ITS OWN PACE



A SECTOR SLOWLY COMMITTING TO THE **ENVIRONMENT**

Small development of organic products in restaurants

A slight reduction in packaging in committed restaurants

BUT ONGOING ACTIONS TO **REDUCE FOOD WASTE**

Development of applications to sell unsold products

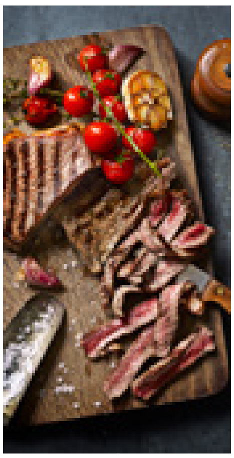
Cook a product from nose to tail

Donations to the needy

THE CURRENT RUSSIAN CONTEXT HAS A POSITIVE INFLUENCE ON THE **OFFER**

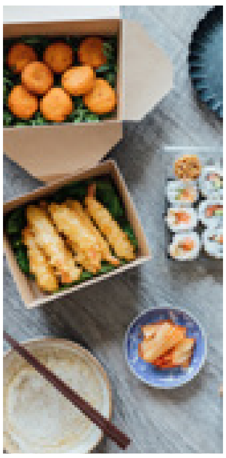
Local supplies up across the country

Consumer interest in seasonal products and positive answer from restaurants



SMALL CHANGES IN TERMS OF **MEAT CONSUMPTION**

Plant-based meat substitute market is slowly evolving



IN TERMS OF **DISTRIBUTION** MODE, HABITS ARE CHANGING

Deployment of meal delivery

Slight rise in click&collect

Development of Dark Kitchen since 2018 in major cities

2016-2019 FOOD SERVICE EVOLUTIONS

+21,9%
Food service market revenue **19 Bn $**

+5,2%
115 280 restaurants

+16,5%
3,6 Bn meals served

+7,1%
5,38 $: Average spending for out-of-home consumption

+46 PTS
21%
Chains

-2 PTS
79%
Independents

RESTAURANTS

Sources:
Foodservice figures: Euromonitor – Consumer foodservice in Russia 2019

UNITED ARAB EMIRATES

THE UNITED ARAB EMIRATES IS SEEING A GROWING DEMAND FOR HEALTHIER AND MORE ORGANIC PRODUCTS. RESTAURANTS ARE EXPANDING THROUGH MULTIPLE DISTRIBUTION CHANNELS.

A DEPENDENT COUNTRY BUT COMMITTED TO **LOCAL** AND **WASTE REDUCTION**.

A country dependent on imports to feed its population (90% of food needs are imported).

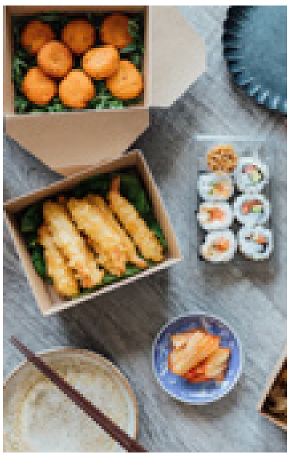
Limited local production but emerging in some regions.

A commitment to reducing food waste, the Emirates records 196kg* of food wasted per year per capita.

A STRONG DEMAND FOR **HEALTHIER** AND MORE **ORGANIC PRODUCTS**.

Increased demand for healthier and more organic products in restaurants.

Appearance of vegetarian and vegan offerings in restaurants. Fake meat is making a gradual entry on the menu.



DISTRIBUTION METHODS ARE **DIVERSIFYING**

A boom in meal delivery, 3 out of 4 people get their meals delivered at least once a week in the UAE.

86% of restaurants are offered on delivery platforms.

THE RISE OF **DARK KITCHEN**

20% of current operators use Dark Kitchens, 30% plan to create one.

2016-2019
FOOD SERVICE EVOLUTIONS

+6,3%
Food service
market revenue **15 Bn $**

+3%
17 382 restaurants

+2%
980 Bn meals served

+4,23%
15,5 $: Average spending
for out-of-home consumption

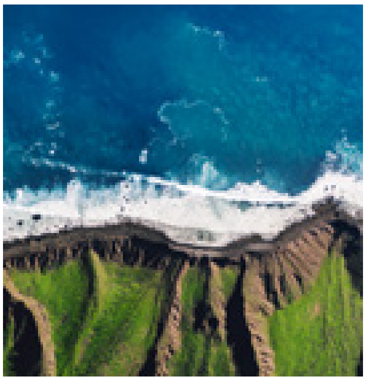
+8 PTS
16%
Chains

+25 PTS
84%
Independents

RESTAURANTS

Sources:
Foodservice figures: Euromonitor – Consumer foodservice in UAE 2019
* Barilla Center for Food & Nutrition
** KPMG UAE 2018 Food&Beverage Report

A CATERING OFFER COMITTED FOR THE FUTURE



A SECTOR THAT IS COMMITTED TO THE **ENVIRONMENT** ON A NATIONAL SCALE

An offer of organic products that is growing widely in restaurants, especially in biggest towns.

A rapidly growing range of local products in the context of Brexit.

A strong rising of plant-based meat substitutes at the restaurants.

Government committed to achieving carbon neutrality by 2050, including new legislation in terms of production, food waste and packaging.

CONFIRMATION OF THE NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT

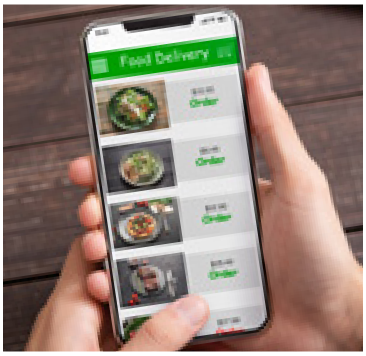
A strong preference for nationally produced foods and confidence in their government in terms of food safety.

Generalized need for information on nutritional benefits of food goods, included in restaurants.

Rising of « fast casual » restaurants as an healthy alternative to traditional fast-foods.

BUT ...

Brexit could lead to a relaxation of regulations in terms of GMOs and use of pesticides on the British soil.



STRONG **DIGITIZATION** OF ALL THE OUT OF HOME FOOD CONSUMPTION ASPECTS

Strong emergence of digital tools for business owners.

Strong use of social networks and review sites.

Take away and delivery are part of British way of consuming food. They are becoming even stronger trends, thanks to digital ordering and payment tools.

2016-2019
FOOD SERVICE EVOLUTIONS

+4,5%
Food service
market revenue **86 Bn $**

+1,2%
162 901 restaurants

+3,2%
5,6 Bn meals served

+1,3%
15,1 $: Average spending
for out-of-home consumption

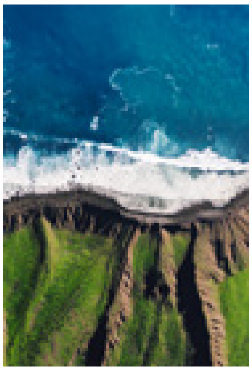
+0,3 PTS
29%
Chains

+0,8 PTS
71%
Independents

RESTAURANTS

Sources:
(Global figures: Euromonitor) – Deloitte - NPD Group

A TWO-SPEED CATERING OFFER: SOMETIMES AHEAD OF ALL WORLD'S TRENDS, SOMETIMES VERY CONSERVATIVE



A SECTOR COMMITTED TO THE **ENVIRONMENT** ON A LOCAL SCALE

Strong development of organic products in restaurants, especially in biggest towns

Strong rising of plant-based meat substitutes in restaurants

Customers favour restaurants that support local community actions

BUT ...

A national legislation that supports intensive farming (GMOs, pesticides...)

Uneven awareness depending on territories

RISING OF THE NEED FOR **TRANSPARENCY** ON FOODS SERVED AT THE RESTAURANT.

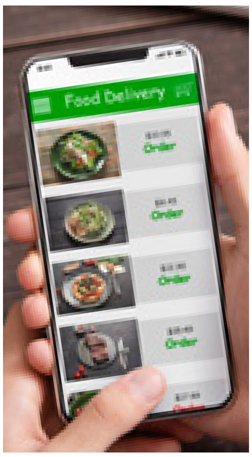
A strong preference for rationally produced foods

Rising of need of information on nutritional benefits of food goods, included in restaurants.

Rising of « fast casual » restaurants as an healthy alternative to traditional fast-foods.

BUT ...

An offer still often made of big portions of saturated fat and sugar foods are still predominant in restaurants.

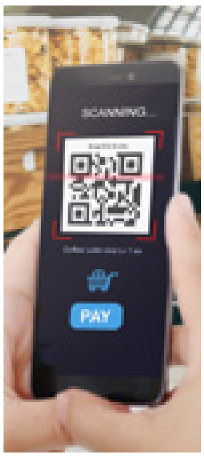


STRONG **DIGITIZATION** OF ALL THE OUT OF HOME FOOD CONSUMPTION ASPECTS

Strong emergence of digital tools for business owners

Strong use of social networks and review sites.

Take away and delivery are part of american way of consuming food. They are becoming even stronger trends, thanks to digital ordering and payment tools.



BUT ...

Reject of full cashless

Digital tools are often too onerous for business owners

2016-2019 FOOD SERVICE EVOLUTIONS

+9,3%
Food service
market revenue **600 Bn $**

+3,3%
695 386 restaurants

+5,7%
61,6 Bn meals served

+3,3%
9,75 $: Average spending
for out-of-home consumption

+1,2 PTS
36%
Chains

+2,3 PTS
64%
Independents

RESTAURANTS

Sources:
(Global figures: Euromonitor) National Restaurant Association - NPD Group

SIAL
INSIGHTS