

Editorial

In 2010, the food industry headlines were marked by two mainstream trends: the increasing **globalisation** of its players and the rising importance of **innovation**. This is clearly demonstrated by Wal-Mart's incursion into Africa, Danone's buyout of the Unimilk dairy company in Russia, Carrefour opening its first supermarket in India and Nestlé launching a Kit Kat suited to Chinese tastes. *"You have to adapt. You have to produce, distribute, sell, and communicate differently,"* asserted Nestlé CEO Paul Bulcke in an interview with *Les Echos* on 16 September 2010. Innovation *"is back in 2010, with projects taken further by industrialists,"* says Xavier Terlet, XTC World Innovation Chairman.

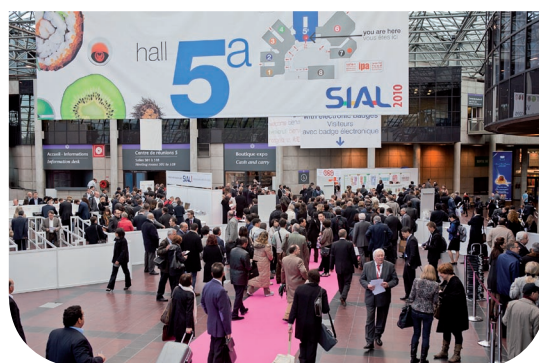
SIAL 2010 echoed these trends perfectly. With some **136,500 professional visitors**, of which 62% were international, from **200 countries**, the exhibition acted as a catalyst for global trade, pushing forward the challenge of a new economic order. Once again, the number of **exhibitors (5,700)** and **countries represented (106)** rose. This confirms SIAL's universal scale and its role as a hub, illustrated by its 250 events and conferences on nutrition, design, retail, foodservice, ingredients, and many other topics. Innovation continues to be the major focus point since **25% more innovations** (compared with 2008) were entered, of which the Trends & Innovations Observatory selected 400.

We wish to thank all those who contributed to making SIAL such a success and will look forward to meeting you in 2012. •

Valérie Lobry, SIAL S.A. General Manager



21-25 october 2012
Parc des expositions
Paris-nord
Villepinte - France



Market

€2,5bn is the turnover posted by Chinese dairy product manufacturer Yili for 2009. According to Rabobank, a Dutch financial services provider which classifies the market actors, this brings Yili into its Global Dairy Top-20, together with its compatriot Mengniu. Some Brazilian and Mexican dairy product manufacturers are hovering on the threshold to this "club".

What better proof that the emerging nations have a role to play in the global economy and are able to cause upheaval, transforming structures that until now have been well established? This is the reason why western players, including Danone, are strengthening their presence outside mature markets such as France.

Players from the emerging countries are obviously not in the same league as Nestlé and Danone, with turnovers of €18.5bn and €10.6bn respectively, according to Rabobank. But the ever-growing domestic consumption of nations such as China and Brazil should sustain the growth of their industries in the long term.

These developments will obviously be closely monitored by French groups (four of which rank in the above classification). A flagship food industry in France, dairy products are the top SIAL sector. While innovation is more than ever vital for maintaining leadership, particularly for healthy products in the yogurt segment, the extremely varied cheese sector offers many possibilities, ranging from nomad snacks to the finest gastronomy. •



Exhibitors

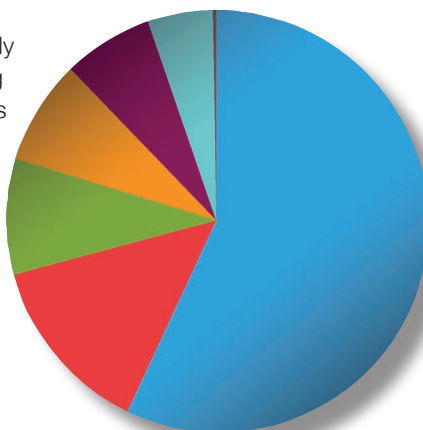
Food Universalis

SIAL 2010 was more international than ever and therefore perfectly attuned to the globalisation of the food sector: **106 countries – including 12 new countries from America, Africa and the Middle East –** were represented.

The large **emerging nations**, with their increasingly significant industries (see “Market” p.1), are among the **Top 10** non-French countries. China now ranks third and Brazil tenth, not forgetting Turkey, the sixth exhibitor country.

Breakdown by **geographic area** reveals the following growth in representation: Middle East (+40%), Asia (+35%) and Africa (+29%). The countries with the strongest growth are, in descending order: Turkey, Israel, Iran, China, India, Thailand, Egypt, Morocco and Tunisia.

France is still top **exhibitor country**, with its 1,000 exhibitors and 22 regions and French overseas departments and territories occupying 20% of the exhibition area. Interrelated with this trend, **the number of exhibitors has also risen: 5,700** compared with 5,500 for SIAL 2008. Among these,



Breakdown of exhibitors by region

- 57% Europe (excluding France)
- 14% Asia
- 9% Middle East
- 8% South America
- 7% Africa
- 5% North America
- 0,2 % Pacific

500 companies were exhibiting for the first time at SIAL, which shows the attraction of the exhibition across the world.

The product sectors with the densest presence were dairy products, meats, confectionery, gourmet products and frozen foods. Fresh poultry and game, tinned and preserved products, semi-processed food products and ingredients, organic foods and grocery products achieved the strongest growth in terms of participation. Noteworthy is the return to growth of the fruit and vegetables sector. •

Testimonials

“Our prime asset is a combination of regular quality and enduring presence in many countries worldwide for our distinctive Italian cured meats. This is why, right from the beginning, SIAL has always been the meeting place for our enthusiastic customers and business contacts.”

Lorella Bottura, Export Manager - **LEONCINI S.R.L.** (Cured meats – Italy)

“ORIENCO’s initial participation in SIAL has fully met its objective thanks to its elegant and compelling presentation, experience and global reach, the massive attendance and substantial contacts made, which may culminate in business development.”

Raymond Hawly, CEO – **ORIENCO** (Import/Export, Dried fruit – France) •



Surveys

- **85 %** of exhibitors prioritise the development of their export markets
- **80 %** are satisfied with the quality of international visitors
- **78 %** display new products at SIAL.

Exhibitors particularly appreciate SIAL’s international dimension and the opportunities for making business contacts (Source: SIAL 2010 surveys) •



Visitors

Target of 200 countries achieved!

A significant SIAL 2010 feature was the internationalisation of its visitors, a tendency also true of exhibitors (cf. page 2). The percentage of international visitors out of the total number visiting the exhibition (some 136,500) rose from 58% for 2008 to 62% for 2010.

SIAL welcomed food professionals from some 200 countries (185 for 2008). What better proof of the exhibition's position in the global agribusiness landscape? With their strong growth, the emerging nations have witnessed the development of vast middle classes formed of keen consumers.



France heads the list of visitor countries, followed by the other major member states of the European Union.

Russia, ranking 14th for 2008, is now in 10th position. The most noteworthy progress of the top 20 countries was achieved by China (leaping from 28th into 17th place) and Turkey (rising from 20th to 13th place). Korea, Saudi Arabia and Egypt made the most significant headway among all the visitor countries.

Of the 19 SIAL sectors, visitors were most interested in Meat & Poultry, Pastry, Biscuits & Confectionery, and Dairy products, not forgetting Fruit & Vegetables, Bakery and Grocery products, including Gourmet foods which remained the main visitor focus for 2010. Furthermore, Organic products rose from 8th to 4th place for numbers of visitors, which is excellent progress for this booming sector.

The main purpose of their visit to SIAL for 70% of visitors (compared with 63% for 2008), irrespective of country or region, was to seek new products and suppliers.

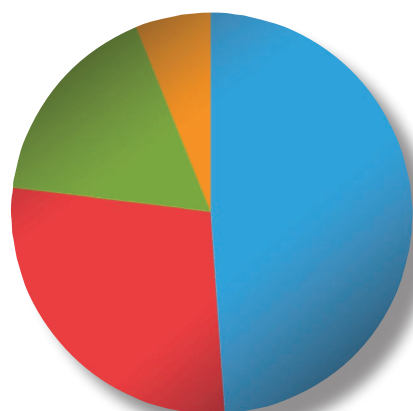
Once again, innovation, comprehensive offering and business contacts – the exhibition trademark – attracted the food professions. These caused visiting time to leap by 6%, thereby demonstrating visitor satisfaction. The average visit is now almost two days. Visitors are of good quality since they are decision-makers (a particularly important point for exhibitors), of whom 38% are top management (chairmen, CEOs and managers).



Breakdown by geographic region (see the graph opposite) shows that Europe (European Union and non-European Union combined) still tops the visitor population. But Asia (+2%), Africa (+1%) and the Middle East (+3%) have made strides, the three regions together totalling 28% of visitors.

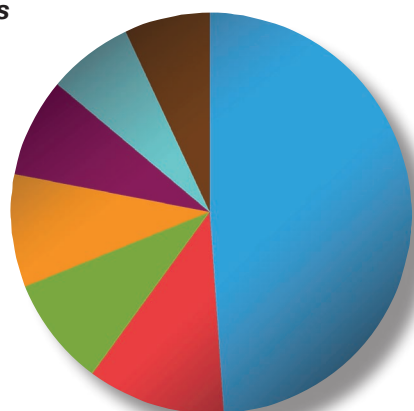
Geographic breakdown of visitors

- 49% European Union
- 11% Asia-Pacific
- 9% Europe (Non-EU countries)
- 9% Middle East
- 8% Africa
- 7% South America
- 7% North America



Visitor profiles

- 49% Retail
- 28% Food industries
- 17% Foodservice
- 6% Services



Surveys

- 88 % of visitors are satisfied with their visit, i.e. +2 percentage points compared with 2008
- 91 % are satisfied with the quality of the exhibitors and 92 % with the quantity

of exhibitors. The main reasons for visiting are to discover new trends to seek new products and suppliers. (Source: SIAL 2010 surveys)



Innovation

SIAL at the heart of innovation

New consumer attitudes and demands, new markets conquered, changing national regulations, responses to all these challenges – affecting not only products but also distribution methods – are driven more than ever by innovation.

This is why **innovation is SIAL's common thread**, present in all the exhibition highlights. **New in 2010:** conferences dedicated to innovation – such as *How to satisfy a responsible consumer*, *Food innovation trends in Europe* and *The keys to successful innovation?* – met with such success.



More than **75%** of SIAL visitors go to the **Trends & Innovations Observatory** where current consumer trends can be interpreted (*mixture of genres, natural and risk free, green attitude, moral products, hunting out suspect ingredients, etc.*). Here, the visitor steps into the food landscape of tomorrow.

Some 985 products were displayed by exhibitors, 400 innovations were selected, and 15 Trends & Innovations awards were given by a jury of experts in addition to two Disney-SIAL awards. French, Spanish, Italian, Dutch, Austrian, Belgian and Slovak companies received awards.

Lastly, Monoprix Group selected 10 products from the products in the Observatory. These products were highlighted during a special event that took place on 25 November–4 December 2010 in 50 Monoprix stores in France. •

Survey

- **98%** of visitors are satisfied with their visit to the Trends & Innovations Observatory
- **96%** of visitors are satisfied with their visit to the Trends & Innovations Observatory
- **87%** consider a visit to the Trends & Innovations Observatory an

Design

Pleasing to the eye

Although consumers want **good tasting food**, they also want **attractive food**. So design takes a place in food innovation. The last four SIAL exhibitions have given pride of place to **"Food design"**. Some 17 prototypes were therefore designed by students from L'École Supérieure d'Art et de Design de Reims on the theme *"The Food Landscape"*. And 10 projects from the Caldas da Rainha Design School in Portugal were also displayed for the first time. •

SIAL D'OR

From innovation to commercial success

The way ahead to commercial success for innovation is hazardous. This is why, for the last 20 years, the SIAL d'Or – organised in partnership with **30 trade magazines** – reward innovations that have been commercial successes in the domestic markets of the **30 countries represented**.



9 "Category" winners joined the 30 "Country" award-winners, from North and South America, Western and Eastern Europe, Africa, the Middle East, Asia and the Pacific region, selected from the **256 products** entered. Product "Categories" included sweet and savoury frozen foods, sweet and savoury grocery products, fresh dairy and non-dairy products, wine, alcoholic beverages and non-alcoholic beverages. Lastly, a **Global SIAL d'Or** was awarded to a Canadian company for its clover honey *"Honey Drops"* in tablet form! •

obligatory stop • **82%** think this is the best place for finding new products • **69%** of visitors think they will visit the stands of the exhibitors whose products are displayed (Source: SIAL 2010 survey) •



Foodservice

SIAL polishes its *Cuisine*

With so many products and innovations from all over the world, how unforgivable it would be not to sublimate them by demonstrating different cooking styles.

This is where “**La Cuisine du SIAL**” takes on its full meaning. Over the years, this has become the favourite meeting place for foodservice stakeholders. In its 380 sqm dedicated to expertise and creativity, **flavours exploded and tastebuds were enchanted by top world chefs** such as Olivier Chaput from France, Roberto Ortiz from Brazil and Nicolas Leseur from Kazakhstan. Among the ten themes selected for this **profusion of virtuosity** were: *Art Food, World Food, Reinterpretation and Fusion cuisine*. Some **20,000 visitors** from the profession enjoyed the talents of these chefs.

These visitors consult a database of **1,800 exhibitors** with a foodservice offer (including new foods, worldwide products and ingredients) and innovations (including 69

selected by a jury of experts). Moreover, foodservice trails and pictogrammes helped the appropriate exhibitors to be easily identified in the SIAL aisles. Last but not least, the dedicated conferences – such as *The 10 musts in commercial catering for 2011* and Trends in foodservice – were a great success. •



IN-FOOD

As essential link in the food manufacturing chain, semi-processed food products and ingredients are also vehicles for innovation.

This pivotal role explains the **35,000+ professional visitors**, and the presence of 113 exhibitors from 20 countries in the **In-Food** area. In addition, **20 highly specialised conferences** on themes such as ingredients for health products, natural foods, and gluten-free, allergen-free and oil-free products.

According to the surveys conducted by SIAL • **94%** of visitors are satisfied with their visit to IN-FOOD • **93%** with the quality of the exhibitors • **98%** consider the offer to be international. • **95%** consider the offer varied • **97%** of visitors believe the offer to be of good quality. •

Food and Health

The 21st century consum'actor does not just want to eat. Conscious of his well-being, he wants his food to help him remain healthy yet procure pleasure. As an environmentally conscious person, he also wants to know the product's carbon footprint. And, as a citizen, he increasingly prefers local produce. Furthermore the consum'actor is connected to the internet, communicating with communities about the pros and cons of his purchases.

The fact that food and health are closely linked has not escaped SIAL's attention. Hence, the **Nutrition & Health Village** is where visitors can meet and talk with the exhibitors during 35 conference sessions covering four topics: Health and wellness in food products: trends and evolution, Preservation of cultural diversity, Sustainable food system and Accessibility of information.

The Agence nationale de sécurité sanitaire de l'alimentation, de l'environnement et du travail (ANSES: Food safety, environment and labour organisation) recalls that: “*Health and safety measures must be adapted to the diversity of food offered, to the globalisation of trade and to new consumer lifestyles and demands.*”

• **96%** of visitors are satisfied with the quality of the speakers • **98%** with the number of speakers • **98%** consider the topics to be of interest • **93%** are satisfied with their diversity (Source: SIAL 2010 surveys). •



Wine by SIAL

Wine takes pride of place

As dishes marry with wines, what would an international food exhibition be without wine?

This is the reason for the exhibition's involvement in the wine sector. SIAL 2010 assembled **218 "Wine" exhibitors, of which 70% were international, from 32 countries:** major wine-producing nations, such as South Africa, Spain, the



United States and Italy rallied together. France was no. 1 exhibitor country with 65 participants.

Since 2006, its profile has been raised further with a dedicated area and brand: **"Wine by SIAL"**, assembling 80 exhibitors and four highlights this year!

Best Buy: Certain exhibitors' wines, considered by a jury of professionals to offer the best value for money, were selected. Some 148 wines from 15 countries competed for the awards given to 29 wines from 10 countries.

Wine Innovation Forum: A meeting point for the profession, where "the sustainable approach" was discussed in depth during 24 conferences.

Varietal area: to discover wines by grape type.

Wine Business Meetings: *"This Wine Business Meetings service with its well-targeted meetings helps to save time,"* according to the Autour des Chefs buyer. For Spanish exhibitor Grupo Elivo-Raisin Dor: *"SIAL was excellent and the visitors of great interest."* •

Gourmet

Fine foods take the visitor on a **journey to discover mythical flavours, time-old recipes and priceless foods.** On the strength of the fashion for unusual foods from the four corners of the earth, this market is now booming.

SIAL therefore created the special event **Gourmet Experience, Fine & Selective Foods**, where more than 300 exhibitors presented some 450 products. Of these, 54 products illustrating the four mainstream consumer trends – rare and confidential, unusual and imaginary, excellence and know-how, essential and mythical – were selected by the jury of experts. •

IN-STORE

From service to solution

SIAL is not just a food exhibition, it also displays a wide range of services and solutions to enhance products at the point of sale at **"In-Store Services & Solutions"** encompassing design agencies, packaging materials, signing, etc.

"Emerging Technology" highlights online purchasing concepts which are innovative or with a strong technology content as demonstrated by **the 3D virtual store** or **augmented reality**, used for certain marketing campaigns. •

Sustainable development

"Sustainability in Food Business", an area dedicated to sustainable development, provided a vast conference programme enabling visitors to get up to date on food issues. The agenda of corporate social, societal and environmental responsibility topics included: *biodiversity, carbon food print, eco design and packaging, environmental impact disclosure, organic products, and more.*

The results of the **first ever global survey** of sustainable development in the food industry, conducted by SIAL, in partnership with LaSalle-Beauvais, were published. Among the **259 manufacturers interviewed**, **87%** stated that they had taken action in the field of sustainability **98%** were convinced that it provides a source of inspiration for the development of new products and services. •



SIAL success with officials

SIAL enjoyed numerous official visits and was greatly appreciated by the French and international industrialists attending the exhibition. SIAL is a key event for public decision-makers across the world, proof of the dynamism and diversity prevalent in the food industries.

SIAL 2010 was inaugurated by **Bruno Le Maire**, French Minister of Food, Agriculture and Fisheries. In his speech the Minister emphasized the necessity of a united French food identity, and he took advantage of his visit to SIAL to **publicly launch the new website for the Food industries observatory**.

Christian Estrosi, Minister for Industry, attached to the Minister of the Economy, Industry and Employment, focused on organic products and IPA (World Food Process exhibition) in addition to the exhibitors. **Valérie Pécresse**, Minister of Higher Education and Research, spent some time at the Nutrition & Health Village, where French research was highlighted.

In addition to the noted presence of **Philippe Rouault**, interministerial delegate for the food industries, SIAL was also glad to welcome the Chileans **Alfredo Moreno Chare**, Minister for Foreign Affairs, and **Juan Andrés Fontaine Talavera**, Minister of the Economy and Tourism, representing the President of the Republic of Chile on an official visit to France.



Inauguration of SIAL by Bruno Le Maire, French Minister of Food, Agriculture and Fisheries

Overall, **12** Ministers, Deputy Ministers and State Secretaries from India, Lithuania, Austria, Belgium, Canada, Poland, Portugal, the Czech Republic, Thailand, and other countries attended SIAL in addition to **5** regional presidents, **2** senators and **50** ambassadors, chargés d'affaires and plenipotentiary ministers.

Moreover, SIAL welcomed **54** international delegations from **27** countries, including Australia, Brazil, Cape Verde, China, Estonia, Finland, Iran, Israel, Japan, Korea, Kosovo, Lithuania, Mongolia, Turkey. •



Official visits by Chilean Ministers of Foreign Affairs and of the Economy, respectively Alfredo Moreno and Juan Andres Fontaine Talavera



Inauguration of the US pavilion by US Ambassador to France and Monaco, Charles H. Rivkin

SIAL Website

Interactive plan, programme of events with a search engine, mobile website, QR Code, social networks and more. In 2010, SIAL developed its web communication in line with user demand.



- **1 million** visits
- **9 million** pages viewed
- **4,000 visits** to SIAL Mobile on the opening date
- **2,500** Facebook **"Like"**
- **200** Twitter **subscribers** •



SIAL MIDDLE EAST

The first ever **SIAL MIDDLE EAST** took place on **22-24 November 2010** at the Abu Dhabi National Exhibitions Centre. With 300 exhibitors from 32 countries, 8 national pavilions, and visitors from 60 countries, the exhibition has become the key event in the region. Keynote speaker Jacques Diouf, Director General for the Food and Agriculture Organization of the United Nations, presented global food safety policy at the top-level *Middle East Food Summit*.

www.sialme.com

SIAL CANADA (Toronto)

SIAL CANADA will be held on **11-13 May 2011**. More than 600 exhibitors will meet some 13,000 visitors from Canada, the United States and all around the world. **SIAL CANADA** is the only North American event to offer a world tour of food in three days. Visitors



will discover regional foods and new ethnic and exotic products from more than 40 countries, including Brazil, Belgium, Thailand, the USA, France, Ecuador, Italy, Japan, Mexico, Morocco, and many others. **New in 2011:** Coffee Cup by **SIAL CANADA**, a competition for the best coffees in the world.

www.sialcanada.com



SIAL CHINA

Following a successful 10th anniversary, **SIAL CHINA** bolstered its position as the essential meeting place for food industry players from the booming Asian markets, boosted by the Chinese market.

The twelfth session will take place on **18-20 May 2011** in Shanghai. **SIAL CHINA** will welcome more than **1,400 exhibitors** from across the world, and more than 32,000 Chinese and international trade visitors. **New in 2011:** A hall will be opened for Wines & Spirits and a competition created for the best Chinese sommelier, showing that **SIAL CHINA** is also leading exhibition for wines and spirits in continental China.

www.sialchina.com

Salon à croquer

Make a date now for the **Salon à Croquer**, the **first public show dedicated to bread, pastries and biscuits**. This is a three-dimensional event – interactive, educational and food loving – encompassing four different worlds to attract consumers: make it yourself, learn to get better, do your shopping, and find the little pluses. **30 September to 2 October 2011** - Paris expo Porte de Versailles.

www.salonacroquer.fr



GOURMET Food & Wine SELECTION



No. 1 trade exhibition for **Gourmet products, wines and gifts**, to be held on **26 and 27 October 2011** in Paris, Porte de Versailles. Tel: +33 (0) 1 76 77 13 15
gourmetselection@sial.fr

IPA



IPA, the World Food Process Exhibition, endorsed its international reach with **40,931 visitors, of which 57% were international, from 150 different countries, and with 45% global exhibitors, from 25 countries.**

The synergy with SIAL maintained its promises. SIAL visitors and exhibitors met suppliers and discovered the latest food processing and packing technologies.

Make a date for IPA for 21 to 25 October 2012

www.ipa-web.com

SIAL thanks all its partners

Atlantic Santé, Bento, Bossa Verde, Cate Marketing, Cfroid, CNIEL, Cook & Com', Crédit Agricole SA, École du Vin, Electrolux Professionnel, Esad, Disciples Escoffier International, Galeries Lafayette, Ingredys Consultant, Institut LaSalle-Beauvais, Kuehne + Nagel, Laval Virtual, Librairie Gourmande, Monoprix, Nicolas Feuillatte, Nutrition Infos, Ordre Culinaire International, Palais des Thés, Polygone Group, Resto Gratuit Pros, Sam Sensory and Marketing, Seb/Tefal, StockFood, The Walt Disney Company, TNS Sofres, XTC World Innovation.



SIAL News

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