

# Fi Global insights 2020 Trend Guide



**Highlights from Fi Europe 2019**

Paris, France

## Foreword

This Fi Global insights trend guide shines a spotlight on some of the trends and innovations that could be found at Fi Europe 2019. We have gathered interviews with leading trend experts at the show, offering perspectives on the most important trends in 2020 and beyond, as well as custom-made infographics highlighting a number of important consumer trends.

With more than 1700+ suppliers filling the trade show floor from across the industry, Fi Europe is renowned for being the place to showcase cutting-edge innovation in Food and Beverage ingredients. Included in this trend guide you will find those companies listed that submitted the new products they launched in the past 2 years for the 2019 Fi Innovation Awards, as well as those selected to be part of our Innovation Tours.

In addition, we are extremely pleased to present some of the most ground-breaking Food and Beverage solutions currently being developed by startups at the Fi Global Startup Challenge 2019. These startups offer a glimpse of the opportunities and challenges that lie ahead for our industry.



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WINNER

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# Market insights critical to tapping plant-based ingredients trend

(interview with Julian Mellentin, New Nutrition Business)

**Growing demand for plant-based ingredients is on everyone's radar, but not all companies understand exactly what consumers want. Through in-depth trend analyses and strategy development, New Nutrition Business helps companies reorient their businesses to meet specific market needs.**



*Julian Mellentin  
New Nutrition Business*

What sets New Nutrition Business apart, according to Director Julian Mellentin, is the fact that the consultancy goes beyond the superficial in order to identify concrete strategies that companies can adopt. This is a key message he hopes to convey during his presentation at the Fi Conference.

"There has been a lot of talk about the potential of plant-based ingredients," he says.

"Yes, it exists, but what does this really mean for ingredient and branded companies? What are the concrete opportunities, and what are the products that connect with consumers?"

## Global perspective

Established in 1995, New Nutrition Business provides expert consultancy services to ingredient and branded product companies on all aspects related to nutrition and health. Inspiration for the business came from Japan, a pioneer in functional foods, and followed Mellentin's intuition that this was a trend set to sweep Europe.

"I don't think that Europe truly understands just how many great ideas start in Asia," he says.

This appreciation of cross-cultural learning is reflected in the current makeup of the company. Some 15 staff operate out of offices in London, Glasgow, Portugal and New Zealand, and there is a filiate company in Tokyo. An impressive 14 nationalities are represented –

"I'm the only Englishman," says Mellentin – and about 95 % of business is conducted outside the UK.



## Beyond the hype

From this international perspective, New Nutrition Business identifies key trends and assesses the opportunities and risks in order to develop implementable strategies. In the plant-based trend for example, Mellentin notes that consumer demand for more plant-based ingredients is not the same as being vegetarian. Furthermore, 'flexitarian' is a term that consumers almost never call themselves. "This is typical of how the food industry comes up with word that their researchers like," he says. "What we do instead is focus on consumers."

Another trap that ingredient manufacturers fall into is believing the hype around their own technology. "It's a bit like a teenage crush; it's not really based on anything," says Mellentin.

"Their focus should be on what consumers want. Consumers might want the benefits of plants, but they might not be all that excited about technology. Pea protein is a good example of this. If you go on social media, you'll see that people really don't know what pea protein is."

Mellentin suggests that manufacturers should instead focus on the technical benefits of their ingredient; whether it tastes better or offers better texture. The advantages should be linked to what consumers actually want.

## Delivering on consumer demands

For food companies that go beyond the hype, the opportunities are there. Mellentin identifies convenience as the factor driving the plant-based ingredient sector.

"People have wanted to include more plants in their diet for a long time, but in more convenient forms," he said. "This is perhaps the single most important issue. For example, people don't want to have to buy spinach, and then have to wash it, chop it and cook it."

This has created opportunities for ingredient and branded product firms to blend plants with existing products, such as bread, dairy and even meat-based products, in order to increase plant content. This, at the end of the day, is what consumers are looking for.

"I don't think any food product category should be ruled out," says Mellentin. "And if it is possible for consumers to experience a tangible benefit, then this is a big plus."



# Resonating with consumers: why storytelling is top trend for 2020

(Interview with Lu Ann Williams, Innova Market Insights)

**Having an attractive and resonant story behind your food and beverage product will be a decisive factor in achieving success in 2020. This key trend is one that manufacturers must get on board with if they are to stand out from the crowd, according to Innova Market Insights.**

"Storytelling is about winning with words and will be absolutely crucial to success," says Lu Ann Williams, Director of Innovation at Innova. "Manufacturers should create resonance with consumers over the origins of the company or the product itself; how the product is produced; or what benefits the product offers. And the number one thing that consumers want to know about is the ingredients. In the world of digitalisation, we have the tools to tell stories and the ability to connect with consumers."



Lu Ann Williams,  
Director of Innovation  
at Innova

In fact, some 56% of global consumers say that stories influence their purchasing decisions. Choices can be based on what consumers hear from friends, often on social media. "This is also an opportunity for manufacturers to explain to consumer how or why things are done," adds Williams. "Consumers are smart; what they want is transparency and authenticity."

An example of good storytelling is a tea product made with super herbs sourced from the Andes; the product provides a clear explanation of both the provenance and benefits of its ingredients.

Williams notes that smaller companies have been the ones driving this trend. "A few years ago, we told the industry to look out for the small guy," she says. "And sure enough, the disruptors have come from the outside. So, if you are not telling stories, you really should start to tell stories about your products."

## On top of the trends

A second key trend for 2020 is the plant-based revolution. This is being driven in part by consumer interest in health, sustainability and ethics, which ties into the broader consumer lifestyle trend towards cleaner living. Williams believes that there is still a lot of market left to penetrate. "There are huge opportunities for making plant-based claims," she says. "We found that consumers prefer the sound of 'plant-based' to 'vegetarian' or 'vegan' and there has been a 68 % growth in plant-based product claims globally over the past five years."

Furthermore, this plant-based revolution is only just getting started. "The industry is still figuring out the terminology," says Williams. "When we talk about plant-based ingredients, what exactly are we talking about? Are we just talking about plant protein? There are also botanicals, green tea, extracts etc."

Demand for plant-based ingredients ties into a third key trend – sustainability. Innova Market Insights research indicates that 87% of consumers want companies to invest in sustainability in 2019, up from 65% in 2018. “Consumers expect that companies will do the best they can,” says Williams. “There has been a massive shift here.”



Sustainable actions can include the use of renewable energy sources, fighting plastic waste, or reducing food waste. “Most companies have figured out what their metric is,” she says. “The key now is understanding who your target market is, and how to communicate your actions to them.” This again ties in with the number one trend – winning with words.

A fourth trend, which Innova calls ‘The Right Bite’, is about targeting products that help people manage whatever lifestyle they happen to be following. Generation Z consumers for example are often looking for products – such as protein drinks – that fit with their on-the-go lifestyles. Stressful modern living has also increased demand for nutritious foods that are easy to prepare, as well as indulgent treats that provide relaxation and enjoyment. “Mental health is on the agenda and is no longer taboo,” says Williams.

This trend also builds on the growing influence of the mindful consumer; someone who is looking for products that are good for them but also wants to feel good about what they eat. A good example of this is a French drink called Bee Zen, which targets the wellbeing of consumers but also supports the sustainability of bees.

The fifth top trend is tapping into texture. “Consumers are really recognising more than ever the influence of texture,” says Williams. According to Innova, 45% of US and UK consumers are influenced by texture when buying food and drinks, while 68% share the opinion that textures contribute to a more interesting food and beverage experience.

This growing awareness of the role texture plays creates opportunities for food manufacturers to differentiate their products from their competitors. Williams shares the example of fluffy pancakes, which are perceived by Brazilian consumers to be tastier, more indulgent, more exciting and of higher quality than normal pancakes. “This should provide some inspiration for other types of products,” says Williams. Another key trend is what Innova calls ‘macronutrient takeover’. Williams notes that sugar is now public enemy number one in consumer perceptions and underlines the influence that the media and science can have on what is perceived to be good, and what is not. Some sectors like ice-cream have diversified, to include plant-based products that target consumers looking out for calories and fat content.



Opportunities for hybrid products is the seventh trend, identified by Innova as a means for brands to market and extend themselves. Mixing a niche ingredient with a more mainstream ingredient for example can help to attract more widespread consumer attention. “Consumers expect to find the perfect product for themselves, and hybrid products is one way of giving consumers a choice that they feel is perfect for them,” adds Williams. Even Coca Cola has launched hybrid products including coke mixed with coffee; energy coke; and coke with fruit flavours.

The final three trends include the fact ingredients are often the ‘stars’, though this requires familiarity and consumer acceptance to work. Probiotics are an example of ingredients that have rapidly gained public recognition. Eat pretty – the fact that many new product launches border on nutraceuticals – and brand unlimited – the fact that brands are engaging consumers like never before – complete the list.

### Exciting times

While storytelling tops Innova Market Insights’ top ten trends for 2020, other key themes from previous years, such as ‘Discovery: the adventurous consumers,’ will continue to feature strongly. “All trends essentially go together and build from previous years,” says Williams. “For example, we’re all global travellers. There is more variation in food, which is why this idea of discovery was one of our top trends for last year. This fits into story telling; people want to connect with something.”

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# NEXT Concept Lab offers forward-looking, predictive solutions

**NEXT helps Health, Wellness and Natural Product innovators maximize their return on innovation investment by using proprietary data, intelligence and insights into what's NEXT.**

"We do this by helping companies of all sizes use market and consumer intelligence to improve the way they do business, make data-driven innovation decisions, prioritize investments and improve decision-making," says Bill Tuohig, SVP, Data & Insights.

Ingredient suppliers need to be well-informed about food trends and broader social, medical, technology, economic and political trends that shape the future of food.

Today's ingredients are tomorrow's consumer products. Ingredient suppliers are 'upstream' from food companies. They need to ensure that their ingredients are developed and available in accordance with new, emerging trends. These ingredients are then used 'downstream' in consumer products.

Trends may indicate that consumers desire more trusted, local and clean products. But what does that mean? And how do those wants and needs translate to demand for ingredients? That's where the NEXT Concept Lab can play a role.

## NEXT Concept Lab

Bill Tuohig provides insight into the best practices that form the foundation of the NEXT Concept Lab and ensures their predictive solutions hit the mark:

1. "We include carefully selected benchmark product category ideas based on known best-selling products and assess opportunities relative to those benchmarks."
2. "We database all the test scores. This affords us a history of highest-to-lowest scoring ideas, and allows us to calculate averages for our ideas overall, and by sub-groups of similar ideas."
3. "We compare our averages to other benchmarks that NEXT Concept Lab provides. For example, the average for our ideas compared to all product category ideas ever tested in NEXT Concept Lab."
4. "We graph our test scores as a scatterplot, with Purchase Intent on one axis, and the "wisdom of crowds" measure, "Market Prediction Score", on the other axis. This is an effective visual tool, helping us spot opportunities and feel confident in pursuing them."
5. "We use the Consumer Segment scores provided by NEXT Concept Lab to identify ideas that might have strong appeal to one segment, but narrow appeal to another. This can indicate when an idea is only just emerging, with only early adopters aware of it."

## What's NEXT?

What sets NEXT apart is the use of proprietary data collected at the Natural Products Expos, an industry insider team of journalists, analysts, trend spotters, and an extensive network of industry connections, which collectively enable NEXT to develop forward-looking, predictive solutions.

See how NEXT's 40+ years of expertise in Natural Products can help you determine where your next innovation investment will have most impact on [WhatsNEXTinNatural.com](https://WhatsNEXTinNatural.com).



*Bill Tuohig*  
SVP, Data & Insights

# Why accurate data is fundamental to business success

(Interview with Rick Miller, Mintel)

**Global economic trends, technological advances and changing consumer tastes all have an influence on global markets. Understanding these trends – and being able to anticipate new opportunities – are critical components to business success. Rick Miller, Associate Director, Specialised Nutrition at Mintel, explains why having accurate data is absolutely essential, from product development right through to targeted marketing.**

**Talk us through the sort of analyses and surveys that are conducted to arrive at Mintel's conclusions.**



*Rick Miller, Associate Director, Specialised Nutrition at Mintel*

Put simply, we use a unique combination of data and expertise. Via 10,000 carefully chosen questions per year, we collect and publish over 3.7 million data points from 1.3 million consumers in 35 countries. Through this scrupulous process – and collecting data on a wide range of topics ranging from personal health and care choices, to food and drink and trending diets in all age brackets – we are assured that the data Mintel has is clean; it's simply the best.

Our analysts are leading experts in their respective categories, often with years of senior experience in industry before joining Mintel. It's this combination that allows us to confidently say our conclusions are not only eye-opening but convincing to our more than 5000 global clients.

**Are there any clear over-arching economic / social trends that are influencing current trends?**

Everyone of course is asking about the economic and social impact of Brexit and what consumers are saying. When we asked consumers about this and published the findings in our Brexit: Future Hopes and Fears – Ireland September 2019 report, 67% of Irish consumers felt that it will be more important to support local food and drink producers after Brexit.

Yet similar trends around the subject of trust are being seen across all food, drink and supplementation categories. Trust is falling in big brands. For instance, 29% of US consumers aged 18-44 say they don't trust large food companies. Instead, consumers are shifting their focus towards smaller, in some cases local brands who place an emphasis on transparency and ethical considerations. This was first noted in Mintel's cross category trend Prove It. Successful brands need to be caring and align with their target consumers' values not just their health and lifestyle.

**How has consumer demand / taste evolved in recent years – can you give examples?**

Yes, it has. A good example is the emphasis on sugar reduction in food and drink and how this has shaped consumers' acceptance of bulk sweeteners. Across the categories, consumers want low sugar and lower carbohydrate options and this, in conjunction with pressure from health authorities has meant that in 2018, 29% of European carbonated soft drink launches contained an artificial sweetener.

Yet, consumers are concerned about the safety and healthfulness of these sweeteners, for instance only 24% of French consumers said they trusted the food industry to only use sweeteners if they were safe. This poses a tricky dynamic for manufacturers and is one of many trends in consumer taste and perception that will continue to evolve in the years ahead with innovations in food science.

### **Have there been any surprises; anything that perhaps might not have been predicted a year or so ago?**

Mintel's trend Locavore, a movement which predicted the change in consumer purchasing from extensive food chains and foods flown from across the globe to a realisation that this consumption model is unsustainable and more local purchasing is necessary for sustainability; has been accelerated in the wake of socio-political movements around climate change such as Extinction Rebellion. There's no doubt that this has influenced manufacturers to bring forward their business development plans for sustainability and the trend has shifted to developing markets faster than might have been anticipated.

### **How can manufacturers use market intelligence to inform their business strategies?**

Mintel's clients understand that the more clean data they have at their fingertips around cross-category new product launches, emerging social trends and consumers' thoughts, the better decisions that can be made surrounding product development and precision-targeted marketing to the right consumer, at an earlier stage.

### **What are your predictions over the next 3-5 years – which trends will continue; which will end; and what new trends are we yet to see?**

Certain trends such as the consumer demand for more plant-based integration into established food and drink categories, with more sustainable and ethical production methods and cleaner labels are well-established trends that will only likely strengthen in the years to come.

The increasing use of wearable technology and greater availability of personal health marker testing, such as microbiome testing will lead to further personalisation in food and drink. Despite the plethora of information available, consumers simply want to cut through the swathes of data and understand what their nutrition needs are. Certain dieting trends such as paleo and keto are merging with the plant-based trend as manufacturers are better able to craft lower carbohydrate, plant-based proteins.

### **What are the key messages you aim to bring to Food Ingredients Europe 2019 – and why should F&B companies stop by your stand?**

With nearly 40 years of market intelligence expertise, Mintel can tell businesses what consumers want and why. Visiting our stand is not only an exciting opportunity to learn about how Mintel can help businesses grow; our global analysts will also be offering a range of exciting talks every day on key trending topics.



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Clean Label & Natural Innovation

In the past 2 years, these companies developed new clean label and natural ingredients or processes.

AAK
AIT Ingredients
Akay Flavours & Aromatics Private Limited
Azelis
Biorigin Europe NV
Blue Diamond Growers
CFF GmbH & Co. KG
Chr. Hansen A/S
Colin Ingrédients
CORMAN SA
CP Kelco
CRISTALCO
Darégal
Destilla GmbH
Dutch Spices
Emsland Group
Fiberstar, Inc.
Flavours Factory
Harboe Ingredients
HI-FOOD SPA
Ingredion
Interfiber Ltd
International Flavors & Fragrances (IFF)
Kerry Taste & Nutrition
Martin Bauer Group
Royal Koopmans
SEMIX PLUSO
Univar Solutions
Zhejiang Silver-elephant Bio-engineering Co., Ltd.

#### Finalists

Chr. Hansen A/S



HI-FOOD SPA



Royal Koopmans



#### Winner

Chr. Hansen A/S



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Diversity & Inclusion Champion

In the past 2 years, these companies have executed strategies focused on creating a work environment that offers equal opportunities for all employees, irrespective of their gender, race, religious background, sexual orientation, and physical or mental ability.

#### Finalists

CP Kelco	
International Flavors & Fragrances (IFF)	
International Trade Centre, Empowering women to Trade Programme	

#### Winner

CP Kelco



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### Food & Beverage Categories Innovation

In the past 2 years, these companies developed new ingredients or processes in one of the following four categories: Dairy, Bread & Bakery, Beverages, Confectionery & Snacks.

Arla Foods Ingredients
Avebe
Berrico FoodCompany bv
Borges Agricultural & Industrial Edible Oils SAU
Darégal
Diana Food
DP Supply BV
DuPont Nutrition & Biosciences
EURIAL Ingrédients & Nutrition
Fast International Co. Ltd.
Griffith Foods
Harboe Ingredients
International Flavors & Fragrances (IFF)
Lucid Colloids Ltd.
PB Leiner

#### Finalists

DuPont Nutrition & Biosciences	
Griffith Foods	
PB Leiner	

#### Winner

Griffith Foods



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Food Tech Innovation

In the past 2 years, these companies developed new processing or packaging solutions for food ingredients or finished products.

Bodec
BRACE GmbH - Chemie - Plastics - DataSystems - Esthétiques
Corbion
Darégal
Handary
ICL Food Specialties (BK Giulini GmbH)
Interfood
iSense AG

#### Finalists

BRACE GmbH - Chemie - Plastics - DataSystems - Esthétiques	
Corbion	
Interfood	

#### Winner

Corbion



### Reformulation Innovation

In the past 2 years, these companies developed new reformulation solutions for increasing fibre content or reducing salt, sugar or fat.

ALGAIA
Bösch Boden Spies GmbH & Co. KG
Bunge Lodders Crokiaan
Chr. Hansen A/S
DISPROQUIMA
DKSH
Griffith Foods
Handary
Harboe Ingredients
Ingredion
International Flavors & Fragrances (IFF)
Kasi Food
Taura Natural Ingredients
Unigrà S.r.l.
vaneeghen

#### Finalists

Chr. Hansen A/S	
Griffith Foods	
Taura Natural Ingredients	

#### Winner

Chr. Hansen A/S



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Functional Innovation

In the past 2 years, these companies developed new ingredients or processes with proven functional properties beyond basic nutritional value.

AAK
Arla Foods Ingredients
Bösch Boden Spies GmbH & Co. KG
Bunge Loders Croklaan
Chr. Hansen A/S
Diana Food
DP Supply BV
DSM
Engel Food Solutions
Glanbia Nutritionals
Griffith Foods
Handary
Harboe Ingredients
Ingredion
Interfiber Ltd
Interfood
International Flavors & Fragrances (IFF)
Kancor Ingredients Ltd.
Kasi Food
Kerry Taste & Nutrition
Mitsubishi Gas Chemical
PT Lautan Natural Krimerindo
Royal Koopmans
Scelta Mushrooms BV
SEMIX PLUSO
Taura Natural Ingredients
Turkimpeks gıda ve kimya sanayi tic a.s.
Unigrà S.r.l.
Univar Solutions
Valio Ltd

#### Finalists

AAK



Bunge Loders Croklaan



Chr. Hansen A/S



#### Winner

Bunge Loders Croklaan



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Future of Nutrition

In the past 2 years, these companies developed pioneering ideas likely to disrupt accepted food supply systems (beyond 5 years).

AAK
Arla Foods Ingredients
Azelis
Griffith Foods
International Flavors & Fragrances (IFF)
Kerry Group
Scelta Mushrooms BV
SEMIX PLUSO
Univar Solutions
Nucaps Nanotechnology
VNF (Viet Nam Food Joint Stock Company)
Pharmako Biotechnologies

#### Finalists

AAK



Arla Foods Ingredients



Nucaps Nanotechnology



VNF (Viet Nam Food Joint Stock Company)



#### Winner

VNF (Viet Nam Food Joint Stock Company)



### Organic Champion

In the past 2 years, these companies developed new organic ingredients or processes.

Akay Flavours & Aromatics Private Limited
Diana Food
DKSH
Harboe Ingredients
International Flavors & Fragrances (IFF)
Panteley Toshev Ltd.
TIPIAK
Tradin Organic B.V.
United Gums Industries (PVT) Ltd.
Univar Solutions
Vestkorn Milling AS

#### Finalists

Diana Food



Fragrances (IFF)



Tradin Organic B.V.



No winner was selected

# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Plant-based Innovation

In the past 2 years, these companies developed new plant-based ingredients or consumer products that help the customer easily replace a similarly used animal-derived product without compromising on quality.

AAK
Archer Daniels Midland Company (ADM)
Avebe
Colin Ingrédients
Döhler Group
Fiberstar, Inc.
Hydrosol GmbH & Co KG
Meatless BV
Ojah B.V.
Unigrà S.r.l.
VLEVY
vaneeghen

#### Finalists

Döhler Group



Fiberstar, Inc.



vaneeghen



#### Winner

Fiberstar, Inc.



### Protein Innovation

In the past 2 years, these companies developed new protein ingredients or processes.

Archer Daniels Midland Company (ADM)
Arla Foods Ingredients
Azelis
Colin Ingrédients
Corbion
Ebro Ingredients
Emsland Group
ICL Food Specialties
Kerry
Ojah B.V.
Ruitenbergh Ingredients
Siveele BV
SOUFFLET ALIMENTAIRE
Unigrà S.r.l.

#### Finalists

Arla Foods Ingredients



Ebro Ingredients



ICL Food Specialties



Kerry



#### Winner

ICL Food Specialties



# Fi Innovation Awards 2019

## Entries, Finalists and Winners

### Sustainability Champion

In the past 2 years, these companies implemented a new sustainability strategy that champions environmental or social sustainability in the F&B industry.

AAK
Archer Daniels Midland Company (ADM)
Bösch Boden Spies GmbH & Co. KG
Chr. Hansen A/S
Corbion
CP Kelco
Diana Food
EURIAL Ingrédients & Nutrition
Fuji Oil (Fuji Oil Europe & Fuji Oil Asia PTE LTD)
Griffith Foods
International Flavors & Fragrances (IFF)
Kancor Ingredients Ltd.
Kerry
Palsgaard
Shafi Gluco Chem

#### Finalists

Archer Daniels Midland Company (ADM)



Palsgaard



#### Winner

Palsgaard



# Startup Innovation Challenge

## Finalists and Winners 2019

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### Most Innovative Food or Beverage Ingredient

*This category covers ingredients or additives that improve taste, texture, appearance and/or nutritional value. E.g. flavours, flavour enhancers, colours, sweeteners, emulsifiers, stabilisers, (thickeners, binders texturisers), acidulants, firming agents, anti-caking agents, leavening agents, humectants, dough strengtheners, fat substitutions, yeast nutrients, PH control agents, enzyme preparations, functional lipids, dietary fibre, probiotics etc.*

Amai Proteins
Micropow AG
Panvega AG
Epinutra
Hempfy

Winner

Amai Proteins



### Most Innovative Plant or Cereal-based Food or Beverage Ingredient

*This category specifically covers ingredients or additives from plant or cereal sources.*

Better Nature Ltd
Caffe Ink
Krusli
Innovopro Ltd

Winner

Better Nature Ltd



# Startup Innovation Challenge

## Finalists and Winners 2019

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### Most Innovative Alternative Food or Beverage Ingredient

*This category specifically covers ingredients or additives from a novel non-animal/plant/cereal source. E.g. fungi, algae, insects, micro-organisms, lab grown/cell-cultured or another non-animal/plant/cereal food source.*

FUMI Ingredients
Tamago Food
Higher Steaks
Pleurette
Lab Lab Ltd

Winner



FUMI Ingredients

### Most Innovative Process, Technology or Service supporting F&B industry

*This category covers innovations that improve food safety, efficacy, quality, traceability, transparency, ingredient sourcing or upcycling.*

Solar Foods
Rival Foods (former Plant Meat Makers)
Cellular Agriculture Ltd
Connecting Food
Qwarzo
Sphera Encapsulation

Winner



Qwarzo

### EIT Food Prize

*EIT Food is Europe's leading food innovation initiative, working to make the food system more sustainable, healthy and trusted. It is a Knowledge and Innovation Community (KIC) established by the European Institute for Innovation & Technology (EIT), an independent body set up in 2008 to drive innovation and entrepreneurship across Europe.*

Winner



FUMI Ingredients

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# Innovation Tours



## Clean Label, Natural & Organic Innovations

Clean label goes far beyond only reformulating to remove artificial additives from a product. Nowadays, it includes authenticity, traceability, organic or sustainable farming. Products made with simple ingredients consumers are familiar with, traditionally and sustainably processed by real people with total transparency about animal wellbeing and the origins of the ingredients.

With 73% of consumers willing to pay more for a food or drink product made with ingredients they recognize and trust, no wonder that food & beverage global sales of clean label products are projected to reach \$180 billion by 2020 (Euromonitor) and the global clean label ingredient market to reach \$47.50 billion by 2023 (Mordor Intelligence).

Niacet
Micreos
Kemin Food Technologies
Weishardt
Tipiak
Avebe
Ingrebio
CP Kelco
IFF
Ingredion

**Download here** the descriptions of innovations that were presented by the participating companies.

## Healthy and Functional Innovations

Consumers are more and more aware of the link between their diet and their health. Around three in five consumers globally say they are always or often influenced by a product's impact on their health and wellbeing when choosing food (62%) and soft drinks (60%) (GlobalData). Most of them take a holistic approach to their health, with not only a focus on healthier food alternatives but also on more physical activity, less alcohol and cigarettes.

The challenge is to age and even die in good health. The increase in consumption of fortified food, coupled with the growth in health awareness among consumers is projected to drive the functional food ingredients market to grow from USD 64.75 billion in 2017 to reach USD 94.21 billion by 2023, at a CAGR of 6.6% (Marketsandmarkets).

Bouwhuis Enthoven B.V
Lactalis Ingredient
Rousselot
Fonterra
Novastell
Stern-Wywiol Gruppe
Griffith Laboratories

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## Innovation Tours

### Reduction & Reformulation Innovations

Around three in five consumers globally say they are always or often influenced by a product's impact on their health and wellbeing when choosing food (62%) and soft drinks (60%) (GlobalData). Sugar (N°1), fat (N°2) and salt (N°4) are among the top 5 ingredients that consumers are trying to limit or avoid. The two others are artificial sweeteners (N°3) and MSG (N°5).

Advances in ingredient innovation using fermentation, natural extracts, fat substitutes and dietary fibre are paving the way for brands to develop healthier food and drink to respond to consumer demand without compromising other important attributes such as taste and texture.

Algaia
Fuji Europe Africa
Metarom
Leiber Gmbh
Bösch Boden Spies GmbH & Co. KG
Azelis
Ebro Ingredients
Vinpai
Hydrosol GmbH&Co
Limagrain Ingredients

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### Innovations from around the world

Globalization is enticing adventurous consumers to experiment with new cuisines. According to GlobalData, 65% of global consumers enjoy experimenting with products from different cultures/countries, and even 79% of millennials and 78% of Gen X. Curiosity and being the first to share a new product on social media (Instagram) are among the drivers of the trend.

Ingredia
Univar Solutions
iSense AG
Nactis
Berrico
Elong Corporation
Agroindustrias Amazonicas
Fazer Mills
HPE Ingredients
Sisterna

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## Innovation Tours

### Healthy Snacking Innovations

Life is increasingly fast-paced and the lack of time influences our consumption behaviours. As a result, the boundary between meals and snacks is fading. According to Nielsen, 76% of global consumers eat snacks sometimes or often and 45% do so to substitute a meal. In addition, consumers are looking for more balanced nutritional alternatives and this is predicted to drive the global market for healthy snacking to \$32.8 billion by 2025 (Grand View Research).

Limagrain ingredient
GreeFood50
NDF Azteca Milling
Bel Industrie
Milletts
Diana Food
Friesland Campina
Tereos
Cambridge Commodities
Roquette

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### Innovations in Beverages

The global beverage industry is expected to reach an estimated \$1.9 trillion by 2021 and is forecast to grow at a CAGR of 3.0% from 2016 to 2021 (Research and Markets). The major drivers for the growth of this market are growing urbanization and disposable income.

Market drivers include sugar reduction, naturalness and new sensory experiences. Within this category global functional beverages (energy drinks, sports drinks & dietary supplements) are growing at 11% CAGR and incremental market size growth will be almost USD 156 billion during 2019-2023 (Technavio). More specifically, the energy drink market is forecast to be the fastest-growing segment due to the steadily growing number of health-conscious consumers.

Destilla Gmbh
Plantex
Prova s.a.s
Biospringer
Daregal
LaVitella
Taiyo
CFF
Brace GmbH
Seqens Mineral Specialties
Nexira

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# Innovation Tour



## Plant-based Innovations

In response to the expected growth of the plant-based sector, companies are increasingly willing to invest in the R&D and production facilities required to manufacture high-quality products. Beyond Meat's successful IPO in 2019 and growth projections of e.g. the plant-based milk market at a CAGR of over 14% between 2018 and 2024 to more than \$38 billion are indicative of that development. Burgeoning consumer interest in health, sustainability and ethics, as well as their exposure to plant-based products, are spurring this popularity. ProVeg International has identified the most promising products in the plant-based sector for you to learn about innovative plant-based solutions, their different applications and how they will benefit your bottom line.

AAK
ADM
Avebe
Bunge Loders Crokiaan
Cargill
Döhler GmbH
Greenfood50
Hydrosol GmbH & Co KG
Phycom
KMC

**Download here** the descriptions of innovations that were presented by the participating companies.



## China's emerging food ingredients innovations & new trends

There are an estimated 1,623+ food additive manufacturers in China, existing of 720 edible flavor manufacturers, and 957 food additive companies. Annually they are meeting 80% of the global demand for vitamins (worth 4.5 billion USD), they make up 80% of 150,000 tons of global production capacity of food preservatives and 90% of food thickener production, while around 80% of food acidulant is being manufactured in China.

Brother Enterprises Holding Co., Ltd.
Zhucheng Haotian Pharm Co., Ltd.
Linyi Shansong Biological Prod. Co., Ltd.
Qingdao Bright Moon Seaweed Group Co., Ltd.
Shandong Sanyuan Bitotechnology Co., Ltd.
Chenguang Biotech Group Co., Ltd.
Shandong Kunda Biotechnology Co., Ltd.
Vitasweet Co., Ltd.
Laiwu Taihe Biochemistry Co., Ltd.
Heibei Huaheng Biological Technology Co., Ltd.
Zhejiang Medicine Co., Ltd.
JK Sucralose Inc
Yantai Oriental Protein Tech Co., Ltd.
Deosen Biochemical Ltd.
RZBC Group Co., Ltd.
Futaste Co., Ltd.



# Meet our charity partner: The Hunger Project



## Hunger is not just about food – it is about people like Kamla Devi

Over 820 million people in the world suffer from chronic hunger. That is 820 million too many. It is The Hunger Project's goal to end world hunger by 2030. We believe people living in hunger are not the problem – they are the solution. Like Kamla Devi from India, who works tirelessly to lift her community from hunger and poverty. We invite you to get to know Kamla and The Hunger Project, be inspired and get involved in ending world hunger at Fi Europe.

The Hunger Project shifts mindsets of women and men so they transform into leaders for the sustainable end of hunger by unlocking their capacity, creativity and leadership and empowering them with the skills, knowledge and resources they need. This way they can break the poverty cycle themselves.

### Invest in female leaders

In India, where one out of four people do not have enough to eat, The Hunger Project trains elected women representatives in village councils to become effective leaders who lift their communities out of poverty to fulfil their mandate to the best of their abilities, pull the right strings, and secure a range of provisions for their village. Leaders like Kamla Devi from Uttarakhand make sure subsidies and government schemes are efficiently deployed where they are needed.

### Impact in India

Kamla: *"I learned everything during The Hunger Project's training: from introducing myself and talking to government officials, to applying for schemes and subsidies online and writing proposals."* In four years' time, she achieved the following:

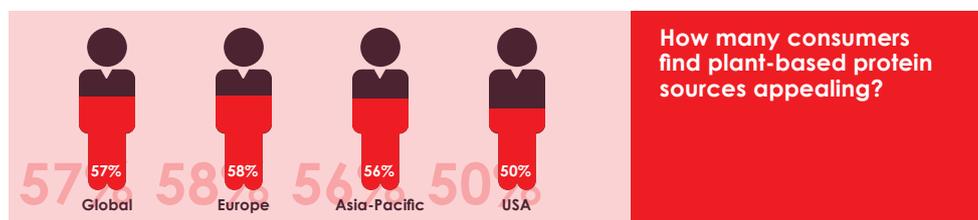
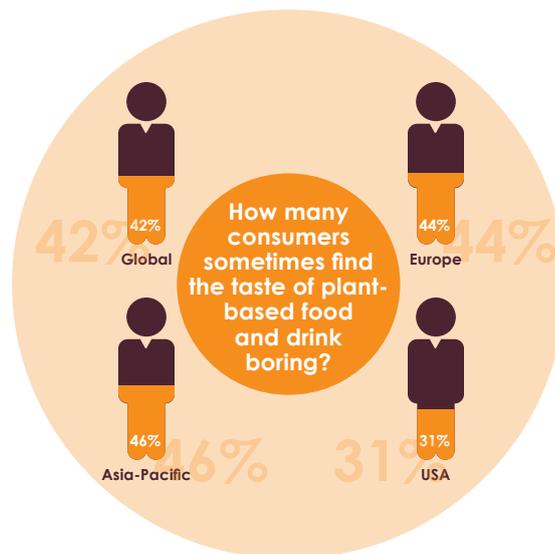
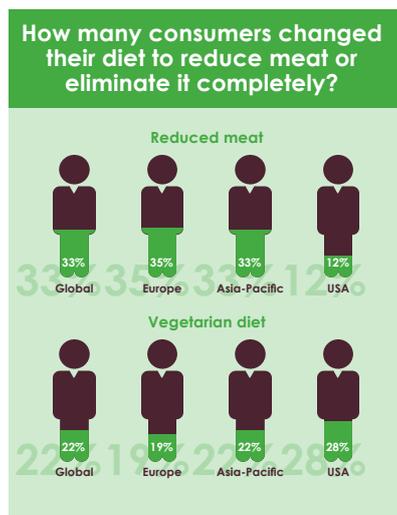
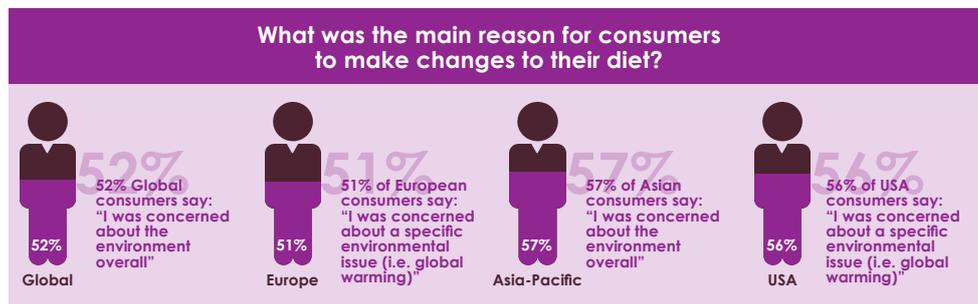
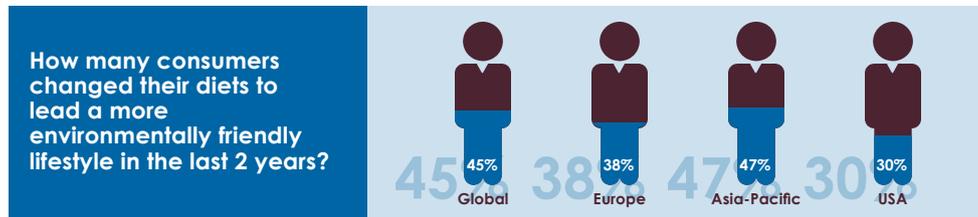
- ✓ Successfully completed development work worth \$145,000
- ✓ Constructed 12 cement roads, 20 irrigation canals and 75 rainwater harvesting tanks
- ✓ Made clean drinking water accessible for everyone in her village
- ✓ Planted 3,000 trees
- ✓ Ensured employment for over 100 people, including 90 women from her village

**Empower women like Kamla, support  
our work and make your donation at  
[www.justgiving.com/fieurope](http://www.justgiving.com/fieurope)**



# Plant-based diets

What do consumers say?\*

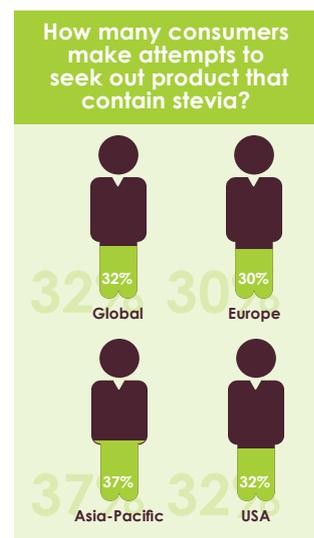
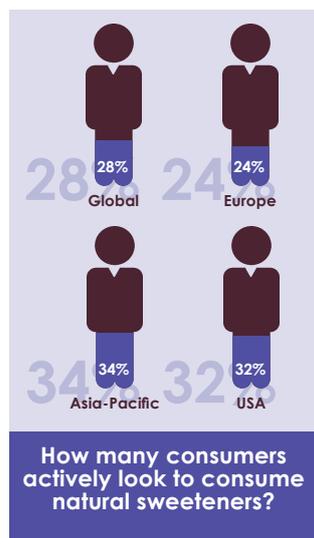
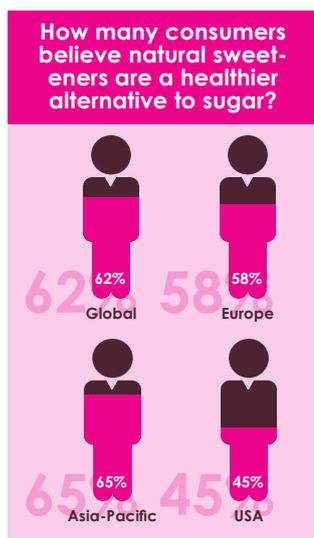
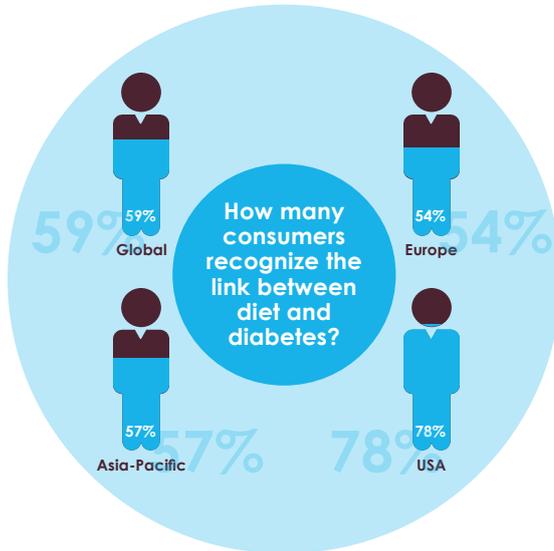


Sources:\*

1. FMCG Gurus Sustainability survey – 26,000 consumers surveyed globally – 11,000 Europe, 7,000 Asia-Pacific and 1,000 in the USA, 2019
2. FMCG Gurus Active Nutrition survey – 26,000 consumers surveyed globally – 11,000 Europe, 7,000 Asia-Pacific and 1,000 in the USA, 2019

# Sugar alternatives

What do consumers say?\*

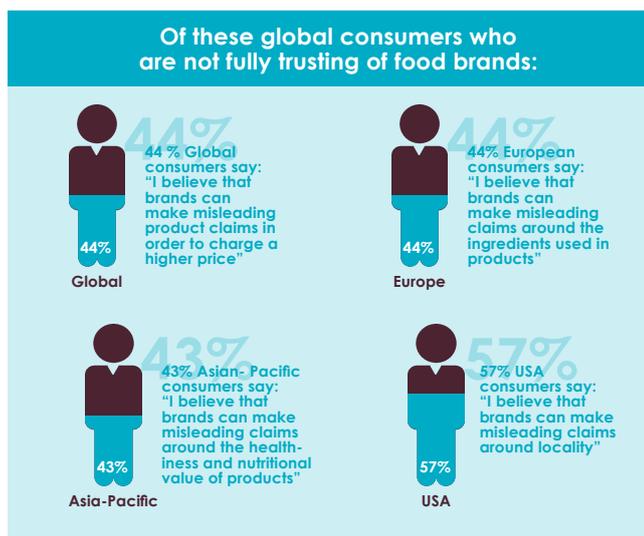
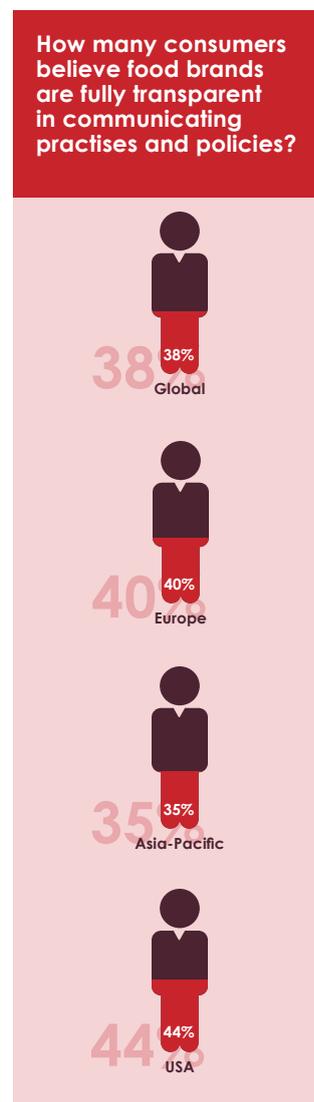
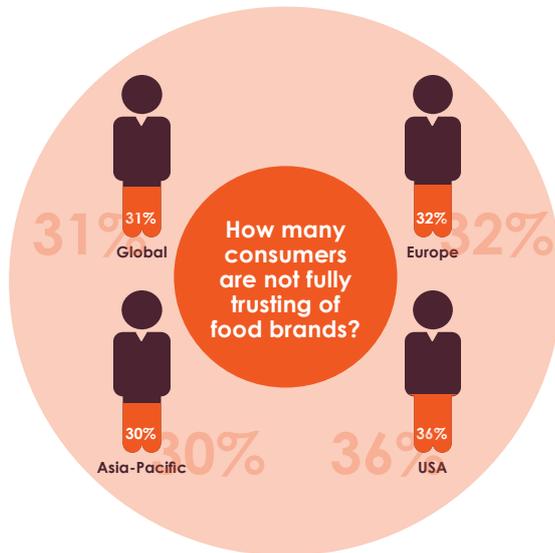


Sources:\*

1. FMCG Gurus Country Profile survey – 25,000 consumers surveyed globally – 12,000 Europe, 6,000 Asia-Pacific and 1,000 in the USA, 2019
2. FMCG Gurus Weight Management survey – 25,000 consumers surveyed globally – 11,000 Europe, 7,000 Asia-Pacific and 1,000 in the USA, 2018/2019

# Transparency

## What do consumers say?\*



Sources:\*

1. FMCG Gurus Blockchain survey – 26,000 consumers surveyed globally – 11,000 Europe, 7,000 Asia-Pacific and 1,000 in the USA, 29th July 2019-12th August 2019

