



A foodstep into the future





Index

Preface	4
Taste Tomorrow at a glance	6
Research summary	8
Concept evaluation	10
Why do we do it?	12
A world tour of events	14
• Trend Taste	16
• Trend Health	28
• Trend Freshness	40
• Trend Craft	52
• Trend Ethical lifestyle	64
• Trend Transparency	76
From data to recipes	90
• Trend Ultimate convenience	110
• Trend Next level experience	122
• Trend Hyper personal	134
Consumer insights, fuel for innovation	144
Conclusion of the COVID-19 updates	148
A world of inspiration	150

Taking a glimpse into the future

At Puratos, we aim to be a reliable partner in innovation for our customers. Helping our customers to become even more successful in their businesses is one of our main objectives. Although we are a business-to-business company, Puratos invests heavily in continuous and detailed consumer insights. For our customers and ourselves it is crucial to understand what the consumer trends are and to know how consumer behaviour is gradually evolving.

The main reason why we conduct the Taste Tomorrow survey – and subsequently organise our Taste Tomorrow events – is that the world is changing rapidly and even faster than before. With Taste Tomorrow we aim to provide continuous and essential insights to our customers so that they can react even better to changing market conditions.

At Puratos, we want to be part of the future. A better and healthier future. That is why we want to show *our* customers what *their* customers expect. We inspire with new product ideas, innovation opportunities or even new processes that might be needed to produce these products.





It has been overwhelming to see how many customers have accepted our invitation to attend our global and local Taste Tomorrow events since the release of our study results. I truly hope that we inspire our customers and help them in their creative process. Furthermore I wish that this sets a new dimension for our collaboration and that this will continue to develop in the years to come. In that way we will be able to future proof both our customers and our own business.

Daniel Malcorps
Chief Executive Officer of Puratos Group

Taste Tomorrow at a glance

Taste Tomorrow is the world's largest ecosystem for consumer understanding in bakery, patisserie and chocolate. Through in-depth insights into global and local consumer behaviours, attitudes and choices, Puratos' proprietary research program offers a foodstep into the future by tracking the evolution of trends and unveiling new ones.

On a trip through time

How did we find these trends? In order to learn what is shaping our market, we set up a survey with Ipsos, one of the largest global market research agencies in the world. The results will take you on a trip in a time machine. We show you how consumer expectations in the bakery, patisserie and chocolate industry have evolved in the last ten years. But we also show you what the future looks like and what consumers expect in 2030.

Taste Tomorrow consists of three pillars:

1 Research

- Global market study
- Future trends and consumer behaviour regarding bread, pastry, patisserie and chocolate
- A continuous monitoring of the evolution the Taste Tomorrow Foodsteps based on real-time online behaviours & semantic AI Identification

2 Events

- World tour of events in four continents
- Local events at market and country level
- One to one customer presentations
- Fully immersive and phygital events

3 Inspiration

- Website
- Social Media
- Trend booklet





Our consumer understanding ecosystem

With Taste Tomorrow, Puratos continuously monitors trends by combining the latest digital technologies and semantic artificial intelligence techniques. We also question more than 17.000 consumers in 40 countries, talk with 80 foodies in trend-setting cities and interview both customers and industry experts. This data is complemented with a global trend spotting network, exhaustive sensorial research and unique partnerships with researchers, flavour houses and universities.

The results?

Always-on insights in bakery, patisserie and chocolate all over the world.

“To create the best finished goods and to anticipate on what will come next, you need to know your consumer’s needs and expectations.”

Research summary

In this e-book we will present you with the top line of the research results. Looking into the consumers' expectations of the future, we have summarised the outcome into nine key trends. We also obtained a clear understanding on why and how consumers choose, select and buy their baked goods. And on top of that we discovered some great opportunities to future proof concepts in our baked goods industry.

Throughout the e-book we will dive deeper into the nine key trends. In order to bring them to life, we use infographics, show cool concepts, present recipe ideas and share expert opinions of industry leaders. Please note that the selection of all these concepts and experts was done on an editorial basis. There is no commercial link in relation to any of the articles.

Nine key trends shaping our industry today, tomorrow and beyond:

1 Taste

It is taste above all when buying bakery, patisserie and chocolate. However, consumers want to be wowed by all their senses. Since the coronavirus outbreak, the price also became a key decision driver.

2 Health

Consumer expectations around health continue to evolve. Healthy food is about less and more at the same time. Highlighting power ingredients that provide health and taste is the key to success. Hygiene has also become an important focus, and consumers are looking for functional food to boost their immunity.

3 Freshness

Freshness defines the consumer's perceptions of quality. Let them experience freshness. The smell, time of baking, short shelf life, look and crunchiness all play a crucial role. During the pandemic, unpacked products made consumers uncomfortable. Freshly packed with 1-2 days shelf life has become popular.





If you would like to dive deeper into specific topics, or if you are interested in knowing more about the local results for your market, contact your local Puratos representative to schedule a meeting.

4 *Craft*

Consumers are looking for craftsmanship and are willing to pay more for handcrafted products. It is about food with a human touch. Showcase your expertise and share your traditions and heritage. Today, artisans are the most trusted shopping location for hygiene and food safety.

5 *Ethical lifestyle*

Food, lifestyle and ethics are closely linked. Consumers increasingly want to make ethical food choices, taking into account their personal values, the planet's interests and the people living on it. Locally sourced products are also considered to be more trustworthy.

6 *Transparency*

Consumers read the information on the packaging. Clear labels and information from field to fork contribute to creating the necessary transparency. Technology can be an enabler.

7 *Ultimate convenience*

With so little time and such busy lives, consumers demand the ultimate convenience. The pandemic substantially accelerated the digitization of our industry. Today consumers expect easy, online ordering and delivery solutions.

8 *Next level experience*

If taste is king, experience is queen. Consumers want to be amazed and surprised. This goes beyond food. The total eating experience matters more than ever. There is a switch from out-of-home to in-home with a set of new hygiene protocols.

9 *Hyper personal*

Food is getting personal. Consumers now see food as an expression of self, so custom-made bread, patisserie and chocolate are highly appreciated. Given the increasing presence of digital wearables, the data is available to develop this further. First initiatives on DNA based, personalized food triggered consumer interest but turned out not yet scientifically grounded.

Concept evaluation

Together with foodies from trendsetting cities we organised co-creation sessions around concepts and innovation within the bakery, patisserie and chocolate sector. Many ideas were drafted, finally resulting in a selection of six inspirational concepts. During the Taste Tomorrow research we asked consumers to rank these product concepts on uniqueness and their willingness to buy it.



1

1 Bread or cake of the future

The world population keeps on growing rapidly, therefore we need bread or cake made from flours from alternative sources in nature like insects, combining good taste with optimised nutritional power. This bread or cake of the future combines natural nutritious ingredients, good taste and limits environmental impact for future generations.

2 Pain à la coupe

I love it when I can choose. In my bakery, the baker proposes big loafs of breads, and I can choose the quantity I want: a bit of this one, and a piece of the other. These breads are all made with natural ingredients like grains or sourdoughs. The large piece of crumb and the heavy crust make the bread really tasty. So I pay only what I take, and I have less waste. And so does my baker.

3 My bread

I like to personalise everything. Now I can even personalise my bread. When consumers do their shopping online they can order their own bread to their personal taste: picking and mixing from the ingredients they like. The baker bakes to order and the consumers can pick it up or get it delivered with the rest of their grocery shopping.



2



3

4



If you would like to know more about the results of these concept evaluations, please contact Nanno Palte, NPalte@puratos.com

5



4 3D decorating printer in-store

I am super creative and love to have a delicious personalised artwork on my cake. In your supermarket you first choose a ready-made cake base in your preferred flavour. With some easy choices on the screen of the 3D printer, you then select the ingredients for the toppings (*sugar, chocolate, confectioner's cream, ...*) and their exact shape. You can choose, upload and print any creative image: like flowers, animals, text messages, or even scan your face.

5 The super transparant chocolate

I am curious about the origin of the chocolate I eat: from the bean to the personal story of the cacao farmer until the shipment to the store. This super transparent chocolate is a great tasting chocolate that shares all the information on the chocolate-making process. With a QR-code, or a mobile app, you can follow every step of the production process.

6 Pop-up bakery/chocolate/patisserie store

In the pop-up store (bakery – patisserie – chocolaterie), local craftsmen can come together to create, bake and sell their products. It is a place that connects people from the community: craftsman and local people creating and buying handmade products. At the same time special workshops and events can be organised around bread, cake or chocolate.

6



Why do we do it?

Running an extensive research like the Taste Tomorrow survey is never a goal on its own. Philippe Arnauts, Group Communication Manager at Puratos, explains how the Taste Tomorrow results help shape our innovation calendar.

As a reliable partner in innovation, we believe it is very important to help our customers to continue making the best bakery, patisserie and chocolate items. Understanding your customers' needs and expectations is essential for a company's success. These expectations are continuously increasing and often paradoxical. They expect more healthy products, but at the same time want to be able to indulge. They seek more handmade items and craftsmanship, but expect 24/7 availability as well. They want natural ingredients only, but expect products to stay fresh for a long time. It is not always easy to understand these perceptions, especially as they evolve rapidly. The Taste Tomorrow survey aims to provide insights into the current trends, but also exposes how they are evolving to give a good perspective on what the future will look like. A better understanding of consumer expectations can help our customers to stay at the top of their game.

New product development

For Puratos, it is also critical to know how the consumer expectations in our industry are evolving. If consumers require more convenience for example, we will take that into account for our new product development. The survey clearly

shows consumers look for more grains and seeds, more fruit, less fat, less salt, less sugar and also have specific expectations around organic, cleaner label, ... We focus a lot on bringing these products to the market and updating our recipes and concepts to match these expectations.

Longer term trends also allow us to explore new possibilities. The trend of hyper personalisation has lead us to develop the *My Bread-concept* for example, which allows consumers to create their own bread, based on their personal preferences.

Solid data to backup strategic decision making

Our aim is to provide our customers with clear data for their country and specific industry in order to support their new product development. There are a lot of trend reports out there, but they are often based on perceptions of a limited amount of foodies or just hyping trends. In our survey we use foodies too, but that is only a small part of it. We also interview experts, customers, have an internal trend spotting network focused on finished goods, listen to what is being said online and of course validate all our findings with over 17.000 consumers around the world. This results in solid data which can be used for strategic decision making.





What Taste Tomorrow insight took you by surprise?

Personally I was most surprised by the level of openness consumers have towards new technologies. Around the world we saw that consumers are very open to adopt technologies like 3D printing, automatically scanned shopping trolleys, digital assistants or fingerprint payment. And these are not just young people or tech-savvy consumers.

Another striking, more local, outcome was that – specific for Asia-Pacific – we had quite some consumers telling us they are interested in food with functional benefits. Like food that improves their eyesight or beauty. These insights are a nice discovery and provide interesting business opportunities to investigate.

Philippe Arnauts
Puratos Group Communication Manager



A world tour of events


The key takeouts of our latest survey have been first shared during our world tour of Taste Tomorrow events. These exclusive events welcomed leading keynote speakers from across the globe and provided a platform for sharing food trends with senior level executives in the food industry. We kicked off in Asia (Hong Kong) and subsequently hosted major events in North America (Chicago), Europe (Barcelona) and South America (São Paulo).

In each region, a diverse group of customers and industry leaders was inspired by presentations of our Taste Tomorrow study, focusing on the consumer trends in the baked goods industry. A line-up of keynote speakers took the stage to talk about disruptive business models and innovative consumer-based concepts. In this booklet we have featured some of the keynote speakers and innovations.

A taste of tomorrow

At each of our Taste Tomorrow events we focus on sharing interesting content but at the same time we try to give our guests some unforgettable food experiences. The Taste Tomorrow events aim to deliver a multi-sensory experience. Combining interesting research insights with innovative culinary inspiration. In our marketplace we translate the trends into new ideas for finished applications, using the latest techniques and Puratos ingredients.





Take a look at
the event videos
on [youtube.com/
puratosgroup](https://youtube.com/puratosgroup)

*If you did not have
the chance to attend any
of our physical or digital
events, rest assured that in the
upcoming months, several Taste
Tomorrow events will be hosted
throughout the world, with
a focus on the local
relevant results.*

Trend 1

TASTE





Taste above all

In 2015 consumers stated that freshness was the most important factor when buying baked goods. The survey of 2019 revealed that for many consumers taste is now the most crucial factor in the decision-making process. However, it is more than just taste. If the Taste Tomorrow consumer survey proves anything, it is that consumers want to be wowed by all their senses.

KEY TREND INSIGHTS

Taste is crucial when buying bread, patisserie and chocolate

In the Taste Tomorrow survey we asked consumers: 'What is most important when buying bread, patisserie or chocolate?' Consumers could choose between different factors. In 2015, consumers said freshness was the most important for bread and patisserie, and taste was the most important for chocolate. Today, taste has gained in importance. Where freshness is still key for most bread-buying Europeans, for many other consumers across the globe it is taste that has turned into the number one criterion when buying bread, patisserie and chocolate, followed by freshness and price. This means you cannot compromise on taste; it is crucial in the decision-making process when buying these products.

Both traditional and exotic tastes appeal

In the 2015 survey, we saw that consumers liked to innovate, but not too much. It was crucial to stay close to the classics and what they knew already. This explained the success of hybrids like the cronut: an innovation that stayed close to the well-known croissant and donut.

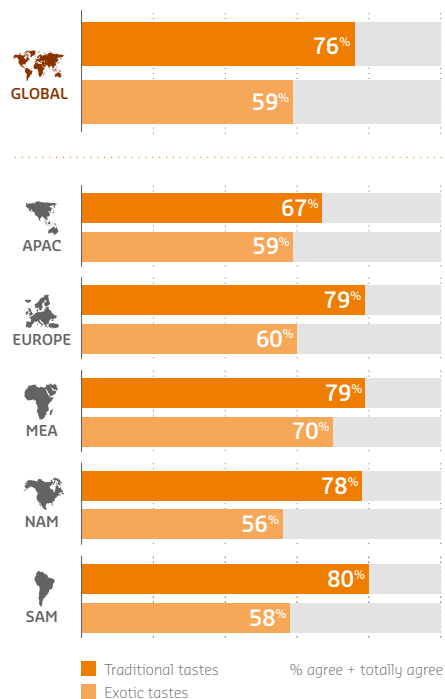
This attitude has evolved. Today, consumers still like traditional tastes, but they increasingly (and now, almost as much) expect to be surprised. They look for unusual and exotic tastes from other parts of the world. So consumers seem to be a bit more open to discovery nowadays.

Never sacrifice on taste

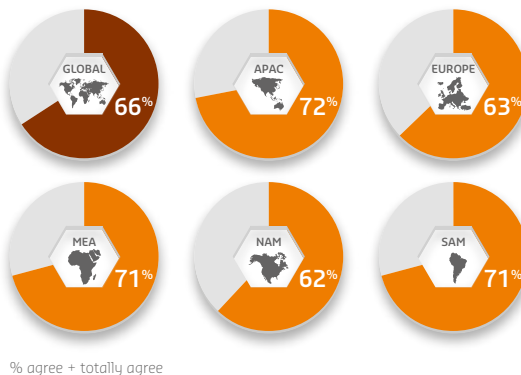
What are the most important buying properties when buying...

2019	GLOBAL	APAC	EUROPE	MEA	NAM	SAM
 BREAD	1 Freshness 2 Taste 3 Price	1 Taste 2 Freshness 3 Price	1 Freshness 2 Taste 3 Price	1 Freshness 2 Healthiness 3 Taste	1 Taste & Freshness 3 Price	1 Freshness 2 Taste & Price
 PATISSERIE	1 Taste 2 Freshness 3 Price	1 Taste 2 Freshness 3 Price	1 Taste 2 Freshness 3 Price	1 Freshness 2 Taste 3 Healthiness	1 Taste 2 Freshness 3 Price	1 Taste 2 Price 3 Freshness

*I like traditional tastes &
I like to try exotic tastes*



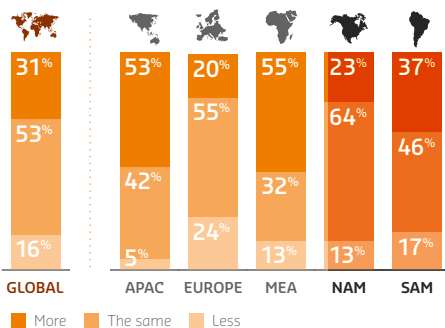
*Texture is a key component
I like to try food with different textures...*



Texture

When it comes to taste, there is another important shift compared to previous Taste Tomorrow surveys. For consumers today, taste is more than just flavour: texture is now a key component too. Consumers pay as much attention to a special, delicious, appealing texture as to flavour. It enhances the eating experience, also because different textures are visually interesting as well. Because while taste is extremely important for the majority, consumers want to be wowed by all their senses. A feast for the eye, multi-layered textures and flavours are essential to create a sensorial delight.

*Taste on the rise
Will food become tastier in 2030?*



KEY TAKEAWAYS

TASTE ABOVE ALL

- NEVER SACRIFICE ON TASTE, AS IT IS THE NUMBER ONE BUYING CRITERION FOR CONSUMERS
- TEXTURE HAS BECOME A KEY COMPONENT FOR CONSUMERS
- AND THEY LIKE TRADITIONAL AS WELL AS UNUSUAL/ EXOTIC TASTES



Taste is still the most important criterion

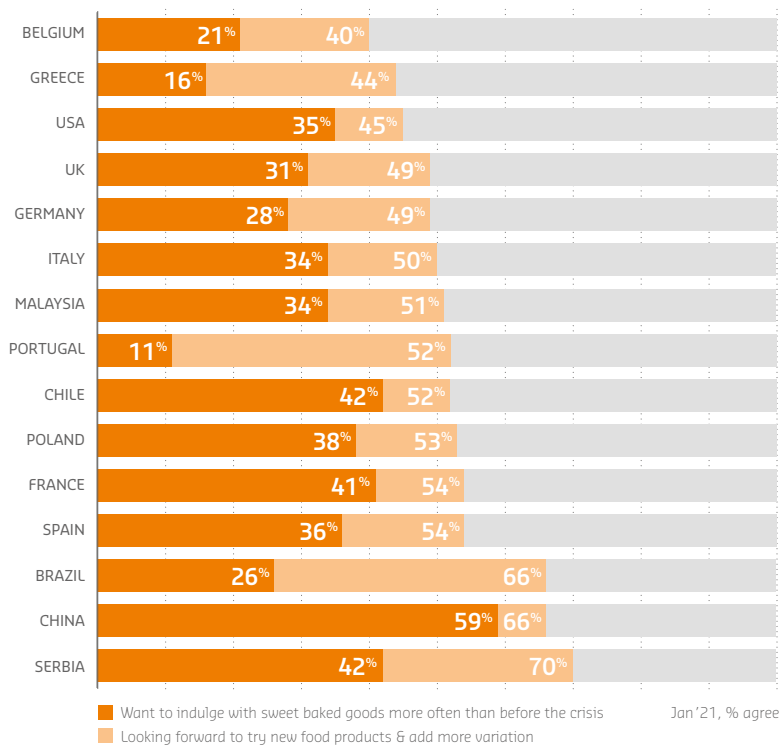
Taste remains a key factor in the purchase decision. In all countries, consumers state this to be the most important criterion when purchasing cakes and chocolate. For bread, taste is the number 2 criterion after freshness. So be sure to never sacrifice on taste!

Food exploration and indulgence will revive...

Consumers like both traditional and unusual tastes, and many consumers are more than ever looking forward to try new food products and add more variation. The survey also shows, that many consumers want to indulge with sweet baked goods more often than before the crisis.

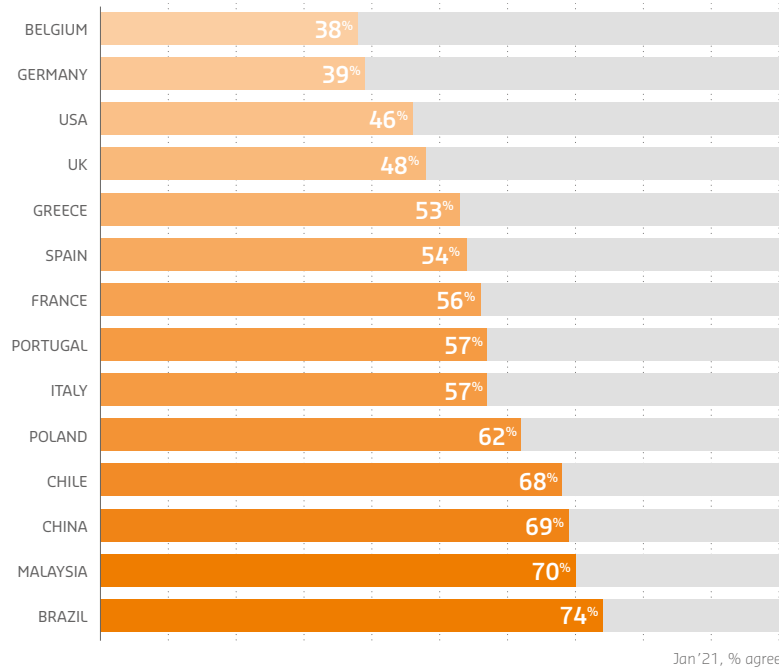
Good news:

Both food exploration & indulgence are expected to revive...

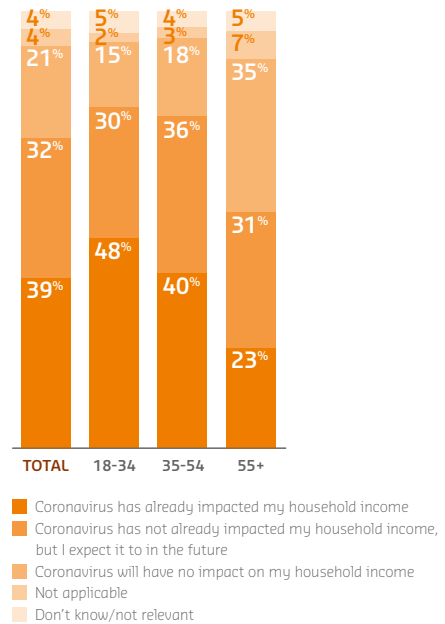




Pay increased attention to the amount spent on food



Impact of the Coronavirus on household income



...but it should be affordable

As the coronavirus has impacted many household incomes, consumers all over the world will pay increased attention to the amount spent on food. More than 1 in 2 families experience or expect financial losses due to Covid-19, and especially younger households have been impacted.



CONCEPT WATCH

Cool concepts that prove taste is everything

For most consumers, taste is the crucial factor when they decide to buy bread, patisserie or chocolate. These three companies truly understand the importance of taste and will offer you a choice of both unusual and classic taste combinations.

1 Carpe Koko!

A blend of art, class and awesome chocolate: that is the Australian chocolate company Carpe Koko! Their stunning handmade chocolates and ganaches are extremely tasty and presented in the most exquisite gift packaging, making them a feast for both the eyes and the taste buds. Their chocolates come in many mouth-watering flavours, like Mango Blaze, Mojito Swirl, Mandarin Confit and Mary Framboise. What would you choose: the Espresso Martini chocolates, combining sweet caramel, espresso grinds, vodka and kahlúa? Or do you prefer the ganaches, with local mangrove honey infused with saffron?

 Australia
 carpekoko.com





2 Supermoon Bakehouse

The New York-based Supermoon Bakehouse sells the most creative pastries, like multi-coloured sweet and savoury croissants, and doughnuts filled with lavender and honey or strawberry, basil and rhubarb. In addition to all these exotic flavours and attractive products, Supermoon also understands the impact of different textures. Their signature coco-pine cruffin is a good example: a coconut cream patisserie with a pineapple and lemongrass jam centre, a coconut glaze, covered with shredded coconut and topped with a white cream bulb and a dehydrated pineapple fan. Or take a look at their sweet and salty soft serve ice cream, topped with crunchy crumbs and a piece of Supermoon's signature croissant: twice baked, with extra salt, sugar and butter.



USA



supermoonbakehouse.com

3 Bread Bread Bakery

You have to be strong-minded to walk into this bakery without buying anything. The smell of bread baking in the wood-fired ovens stimulates your appetite like nothing else. The priority of Bread Bread Bakery is to make healthy bread and ethical choices. They serve a big range of products, from signature loaves to specialty breads and sourdough rye breads. Not to forget their tasty buns, rolls, focaccias, cakes and pastries.



United Kingdom



breadbreadbakery.co.uk



EXPERT VIEW

How to measure and adapt to evolving taste preferences

As taste is of crucial importance to consumers when buying baked goods, for producers it would be great if they can assess whether the taste of their latest creation is going to appeal to their target audience. But apparently, that is not so easy to predict: around 95 percent of new food and beverage products fail. That is why the US-based tech-company Analytical Flavor Systems developed Gastrograph AI: an artificial intelligence platform for food and beverage producers. Founder Jason Cohen, one of the keynote speakers at the Taste Tomorrow Event in Chicago, explains the value of this platform. “We can help make sure that a new product is something consumers are going to love.”

There could be any number of reasons why a new product might fail. Fails can relate to issues regarding branding, distribution, supply chain or pricing. But the most critical thing is the taste of the product. Cohen: “For a product to be successful, you have to get the flavour, aroma and texture right. People have to like the taste of the product.”

Taste over health

The Taste Tomorrow survey shows nine major global trends. One of the key trends is that taste is a crucial factor when consumers buy bakery products, patisserie or chocolate. It is even more important than health. Cohen: “It is funny, but when I ask anyone to choose between a full-flavour pastry or a low-fat or a low-sodium one, they always tell me they prefer the healthy option. But what I see at parties is people choosing the full-flavour option every time. Despite their healthy intentions, they are also looking for something that is going to taste delightful, preferably with new textural properties, new flavour properties or new flavour combinations.”



"For a product to be successful, people have to like the taste of it."



How does it work?



EXPERT VIEW: Jason Cohen, founder of Gastrograph AI

The difficulty of measuring taste preferences

This inconsistency between what people think or say and what they do, leads us directly to the heart of the problem: taste is extremely difficult to measure. There are several reasons for this:

- *Evolving preferences*

First of all, taste preferences are constantly evolving. “As people gain new experiences, their preferences shift to different flavours. New flavour and product experiences are constantly being tested. Take New York, for example. Fifteen years ago, Thai food was still pretty exotic there, bringing people new flavours like lemongrass, curries and spices. Now it is everywhere, with all sorts of specialties like northern Thai, mountain Thai and spicy Thai restaurants.”

Preferences change with new generations as well. “When a new generation comes of age and starts making their own purchases and decisions, they will have been exposed to different flavours and will have developed different preferences. It is a challenge for companies to become the preference of a new generation.”

- *Labelling specific tastes is difficult*

A second reason why it is hard to measure taste: it is very hard to label specific tastes. “Who was the first person ever to label vanilla as vanilla? People will use whatever terms they can to describe it. They might say this is deep, this is rich, these notes of spices remind me of sweet and creamy things. When we examine new flavours, aromas and textures, we can sometimes identify what they are. But they might also include new, exotic flavour experiences that have no reference.”

- *Product development is stuck in the past*

And the third reason why it is hard to measure taste and predict taste preferences, is that, according to Jason Cohen, product development is stuck in the past. “There is no system or platform for updating products to meet changing consumer preferences. And also, most companies now use separate consumer and professional panels for testing. But humans are not sensors: they will always find a way to express their opinions about things. They are not perfectly repeatable. Different people have different sensitivities, vocabularies, different abilities to identify flavour.”



Predict the (dis)liking of specific flavour profiles

That is why Cohen and his team developed Gastrograph AI: a specialised artificial intelligence platform for the Food & Beverage industry that understands what consumers taste. The platform models human sensory perception to predict consumer preference. It measures every individual's sensitivities and biases to different flavours, it controls for the perception of the individual caused by their genetics and experiences when analysing the flavour profile of a product. And it uses the data from these individuals to predict the liking or disliking of specific flavour signatures across the population. This way, Gastrograph AI makes predictions that optimise every step in a food or beverage product's lifecycle – from conception to consumption.

Adapt rapidly to changing preferences

One of the most important benefits of Gastrograph AI is speed. Trends and new preferences will evolve faster and faster, making it more important for companies to rapidly formulate new products that respond to changing preferences. The platform makes it possible to quickly adapt to evolving taste profiles. And that is important, because taste will probably remain the leading determinant in whether someone is going to be a repeat consumer. "When you see a new product that claims to be organic, all natural, without additives, et cetera, you might buy it because of these claims. That is marketing. But you will only buy it again if you like the taste of the product. So we help companies understand the flavours, aromas and textures that are driving the marketing and we help them hit those targets."



"Flavour profiles drive people's preferences."

Trend 2

HEALTH





A healthier future

Consumer expectations around health continue to evolve. The Taste Tomorrow consumer survey shows that – when it comes to healthier food – people want less and more at the same time. Consumers expect fewer calories, and less fat, sugar and salt. But at the same time they want more ingredients with health benefits and ingredients they recognise as coming from nature.

KEY TREND INSIGHTS

Healthy food is more of the good and less of the bad

Food plays an important role in giving a feeling of energy and health. And as consumers more than ever want to live a healthier life, the importance of food is growing. But what do consumers expect of their food? What do they consider as healthy? The Taste Tomorrow survey shows that on a global level healthy food is extremely important, and consumer expectations around food and health are continuing to evolve.

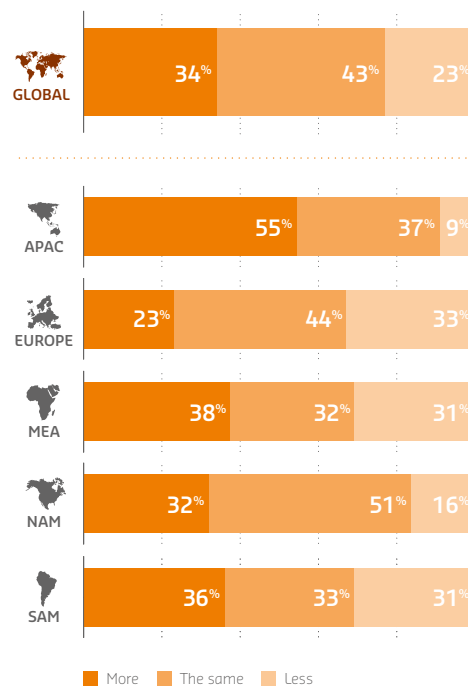
Will food become healthier?

The survey shows that most consumers are optimistic about the healthiness of their future food, especially in the Asia-Pacific region, where only 9% of consumers thinks their food will be less healthy in 2030. But also in all other regions of the world, the majority believes that their future food will be as healthy as it is now, or even healthier.

Consumers were not always so positive about the development of healthy food. In 2015, we observed the trend 'food under pressure', the worldwide pessimism that food would become less healthy in the future. Today, consumers are still less positive than in 2011. But it seems that the 'food under pressure' crisis has stopped and a majority of consumers once more believes that food will become healthier.

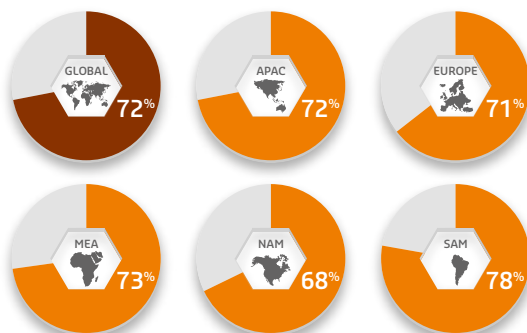
A healthier future

Do you think food will be less, the same or more healthy in 2030?



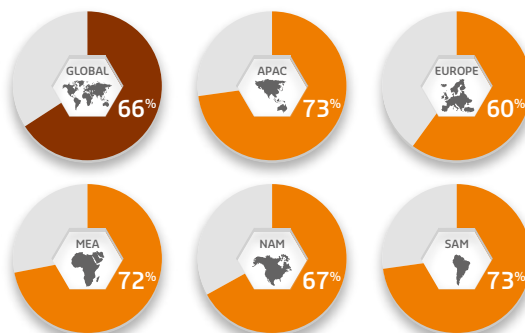
Healthy food is about less and more at the same time

Removing ingredients such as sugar makes food healthier



% agree + totally agree

Adding ingredients such as fibres and proteins makes food healthier



% agree + totally agree

It is more than removing ingredients

What is a healthy product, according to consumers? In the 2015 survey this was mainly about removing ingredients: less sugar, less fat, less salt. Today healthiness has evolved. It's now simultaneously about removing undesirable ingredients and adding ingredients that contribute to a better health, like fibres, proteins and wholegrains.

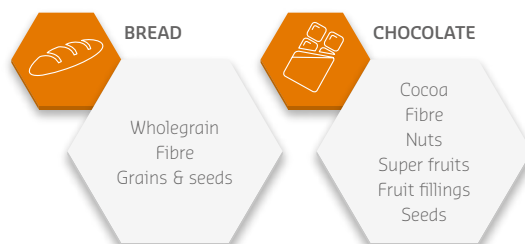
Never compromise on taste

While health is of growing importance for consumers worldwide, it should never be at the expense of taste. Consumers want products that are both tasty and healthy for them. Products that are seen as both healthy and tasty in bread are wholegrains, fibre, grains and seeds. These are recognised by consumers as power ingredients that make products healthier and tastier at the same time.

For chocolate products it's cocoa, followed by fibre, nuts, super fruits, fruit fillings and seeds. These are all products that consumers recognise as close to nature and thereby full of goodness.

Highlighting power ingredients: a key to success

Which ingredients add both to the healthiness AND taste of...



KEY TAKEAWAYS

HEALTHY FOOD IS ABOUT LESS AND MORE AT THE SAME TIME

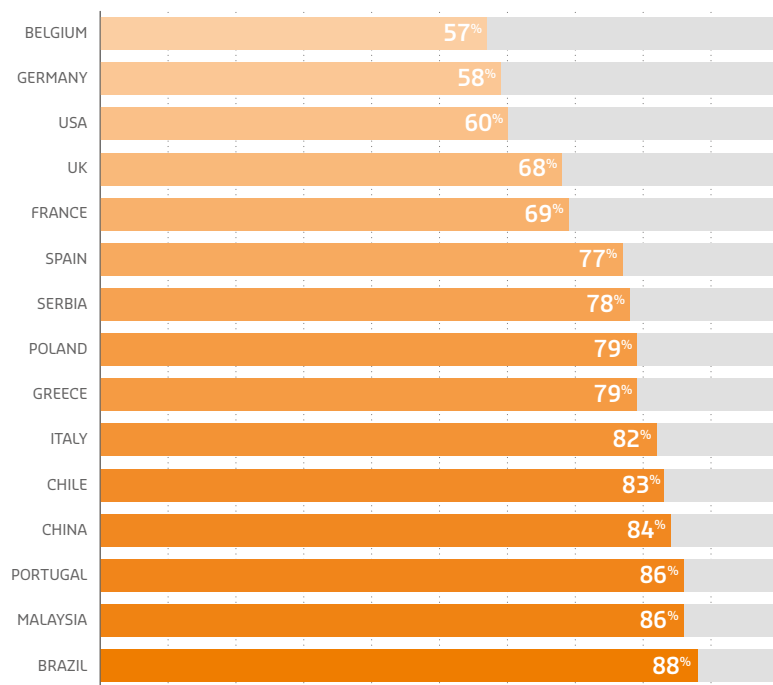
- FEWER CALORIES, LESS FAT, SUGAR AND SALT
- MORE FIBRES, WHOLEGRAINS AND PROTEINS
- HIGHLIGHT POWER INGREDIENTS



Health has become even more important

Health has become even more important due to the coronavirus outbreak. But the way that health is interpreted, has shifted. Before the crisis, health was mainly related to 'healthy food', with fewer calories, less fat, sugar and salt, and with more power ingredients like fibres, grains, seeds and wholegrains. Consumers still consider this important, but due to the crisis, the health-focus also includes hygiene.

Hygiene has become a priority for many shoppers



Jan '21, % agree



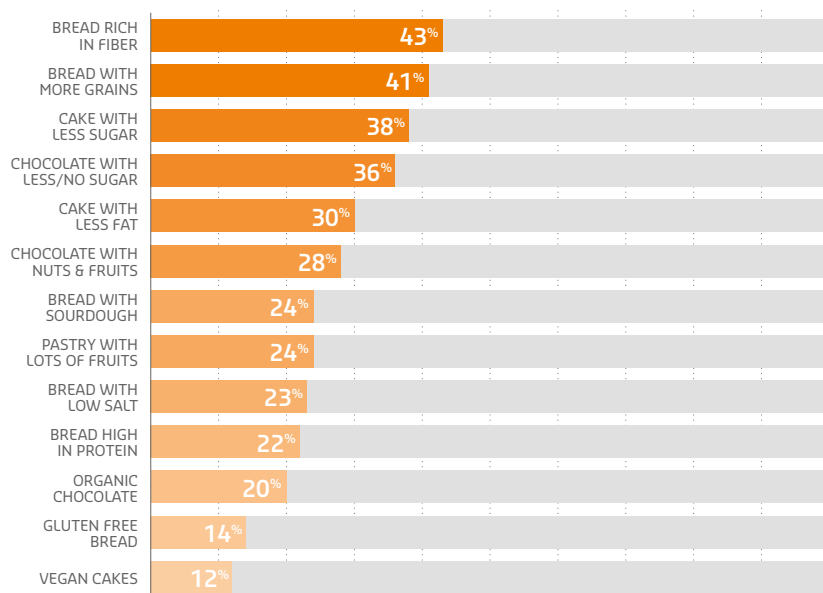
Hygiene has become a key decision criterion

Hygiene has become a priority for many shoppers, especially in China, Malaysia, Brazil & Chile. They pay more attention to the hygiene measures in food outlets, and plan to use more digital payment methods. Consumers also need re-assurance and guarantee on hygiene. They prefer packed goods, look for 'no-touch' guarantee seal, and for sterile and anti-viral packaging. More consumers now prefer baking-off at home, as this offers added hygiene in their opinion.

Healthier food to minimize vulnerability

Besides the need for hygiene, consumers are also looking for ways to improve their health, and to minimise their vulnerability to disease and illness. To achieve that, they will attempt to eat and drink healthier. The COVID-19 crisis actually boosts functional food that supports immunity and mental health, especially amongst millennials. Baked goods that become more popular due to the crisis, are bread rich in fibre, bread with more grains and cake with less sugar.

Which of these baked goods would you consume more of as part of a healthier diet?



CONCEPT WATCH

Cool concepts that understand that healthy is hot

More than ever, consumers want to live a healthy life. And while consumers' expectations around health keep evolving, food continues to play an important role in a healthy lifestyle. That was revealed in the latest Taste Tomorrow survey. The survey also showed that health is no longer just about removing ingredients perceived as 'bad' – it is also about adding ingredients that support well-being. These three innovative concepts respond to the consumer need for healthy food very well.

1 Foodmaestro: the right food for you

Foodmaestro was founded to help consumers answer one simple question: "Can I eat this?" This award-winning platform combines label information with clinical health and wellness data to give info that can be read and understood by everyone. People who have allergies or intolerances, or who follow a specific diet, can use the Foodmaestro app on their mobile phone to instantly check if a product is safe for them to eat. They can scan the barcode or search in the app for a certain product. The founder developed this app after his son suffered a severe anaphylactic shock from something he ate.

 *United Kingdom*
 foodmaestro.me





2



3



2 Brightseed: finding powerful and nutritional plants

Brightseed is convinced that it's possible to transform the modern diet from a cause of chronic illness to a source of health. How? By finding plant-based nutritional compounds that promote health and wellness and incorporating them in everyday food products. To discover and restore these bioactive compounds, Brightseed has developed a special technology called Forager. Brightseed's first discovery is a powerful plant compound that helps balance our metabolism. This bioactive compound shields against the harmful effects of toxic fats that accumulate in the body as a result of a poor diet.

📍 USA
🌐 brightseedbio.com

3 Miyoko's: plant-based dairy products

Miyoko's is on a mission to protect the health of our planet and its inhabitants by encouraging consumers to convert to plant-based products: more specific to vegan dairy products. But without sacrificing on taste. They make 100% non-dairy cheese, butter, and other goodies from organic foods like nuts, legumes, and other plant-based ingredients. Using traditional creamery cultures, age-old cheesemaking techniques, and modern technology, Miyoko's products lead the way into the future of food innovation, where *real* wholesome food is reinvented into new and exciting forms.

📍 USA / Canada
🌐 miyokos.com

EXPERT VIEW

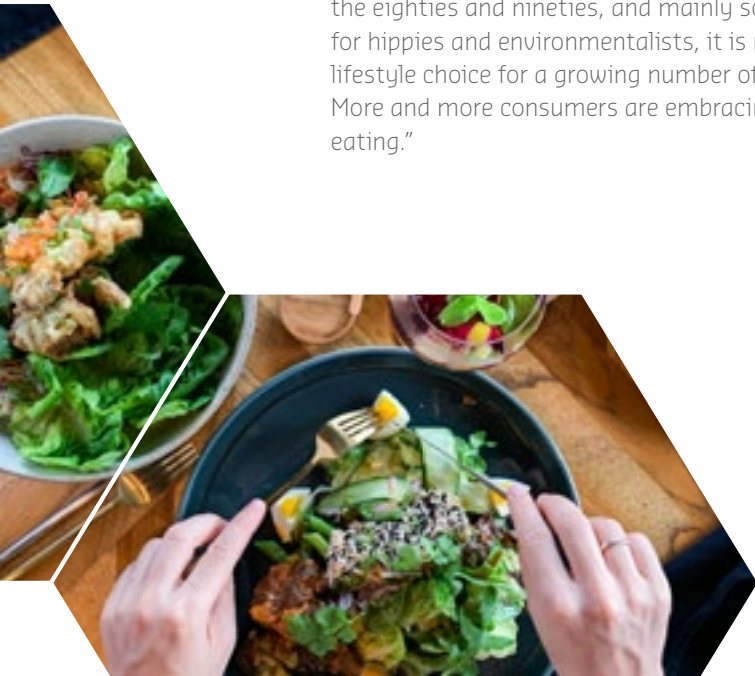
The unstoppable health trend: does function beat flavour?

Food plays an important role in terms of energy and health. As consumers are increasingly striving for a healthier lifestyle, food is becoming more and more important. The Taste Tomorrow survey shows that consumers across the whole world are placing ever-growing importance on what they eat, and have ever-rising expectations about their food combined with health. Taste Tomorrow spoke with Frank Lindner, previously food trendwatcher at Food Inspiration, the Netherlands-based trend and inspiration platform.

According to Lindner, the health trend is clearly evolving, and is slowly but surely becoming mainstream. "While healthy food was a niche in the eighties and nineties, and mainly something for hippies and environmentalists, it is now a lifestyle choice for a growing number of people. More and more consumers are embracing healthy eating."

Food as internal cosmetics

Lindner sees that the health trend primarily has a lot of traction in Western cultures, especially among the younger generation and those who are more well-off. "But", emphasises Lindner, "it is very clear that everywhere, worldwide, a growing number of consumers see food as their internal cosmetics. Our notion about food is changing from regarding it as a nutritious necessity to something cleansing and healing. Trendsetting consumers are increasingly looking at the relationship between calories and nutrients. They are asking themselves: how does a product affect my body? Does it contribute to more balanced behaviour and calmer thoughts? Does the item have a clean label? We do not only want to look good externally, but internally too. There is also a growing body of academic research on the role of our food and health. I predict that, in the coming years, sub-trends of the health trend, such as veganism or not drinking alcohol, will become mainstream."





*"Today, we don't
only want to look
good externally,
but internally too."*

Health is all over the place

What strikes Linder is that the changes are happening very quickly in all sectors: from food service to retail and industry. "There are vegan, no-waste gastronomic restaurants such as Farm Spirit in Portland. And in the fast casual and to-go market, we are seeing an incredible growth in the number of food concepts whose key selling point is health. Examples include the healthy to-go concept Oh My Green in Budapest, US salad bowl chain Cava, and the Health Food Wall at Amsterdam Schiphol Airport where you can grab a healthy meal or snack out of a vending machine."



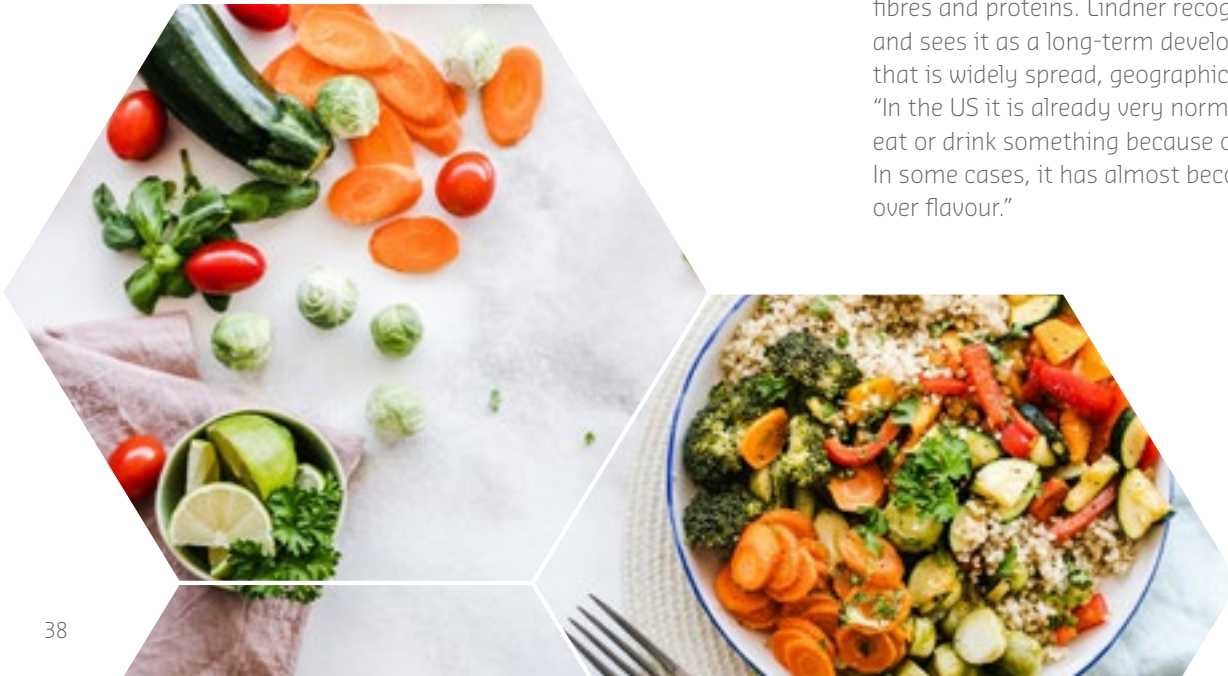
EXPERT VIEW: Frank Lindner, trendwatcher at Food Inspiration

A lot is happening in the world of snacks and fast food as well, continues Lindner. "Fast food chains are serving veggie burgers. In Sweden, Burger King consumers can choose items from the '50-50 menu'. This means you don't know if your burger or sandwich contains meat or is vegetarian. Why is the fast food chain doing this? Because they are so convinced that their plant-based alternative is just as tasty as the meat product."

Lindner says the retail sector and industry are not being left behind either. "Look at the shelves in the supermarket: the number of meat substitutes has grown massively in recent years. And in the industry you see that larger companies are taking over smaller players in order to acquire their knowledge, such as Unilever acquiring Dutch company 'De Vegetarische Slager' (ed. The Vegetarian Butcher)."

Function over flavour

The Taste Tomorrow survey shows that, according to consumers, a healthy product is no longer just about reducing or removing 'bad' ingredients such as sugar, fat or salt. Nowadays, consumers expect that the removal of unhealthy ingredients will go hand in hand with the addition of healthier ingredients, so-called power ingredients, such as fibres and proteins. Lindner recognises this trend, and sees it as a long-term development and one that is widely spread, geographically speaking. "In the US it is already very normal for you to eat or drink something because of its function. In some cases, it has almost become function over flavour."



Although health may be very important, the Taste Tomorrow research illustrates that this can never be to the detriment of taste. In other words, consumers want products that are both tasty and healthy. Lindner partly agrees with this: “For the majority of consumers, taste will always be the most important factor. But I predict that there will be a large consumer group that is purely focused on function, as well as a group that combines tasty and less healthy meals with functional, healthy snacks and items.”

Future of health

The Taste Tomorrow survey also reveals that consumers are optimistic about healthy food in the future. The majority of consumers across the globe expect that, in the future, food will be as healthy as it is now, or even healthier. In fact, Lindner expects that this trend will grow further and that health will become mainstream for more and more consumer groups. He also predicts a counter-trend of food populism in response. “There are consumer groups who believe that they should not be patronised and for whom burgers and fries will remain a cult.”

For Lindner, another future development coupled to the health trend is the growth of the number of wearables, apps and devices that help people to make healthy choices. “Smart contact lenses, smart watches, scanners and implants guide consumer choices in restaurants and supermarkets. Finally, I can see a big role for personalised food in future. For instance, just because a glass of orange juice every morning

is good for you, it does not necessarily mean it is good for me too. People are going to embrace diets and make food choices based on their DNA and their gut, as it is these that truly tell us what options are the healthiest for us.”



“Changes are happening very quickly in all sectors: from food service to retail and industry.”

Trend 3

FRESHNESS





Freshness defines the quality perception

The freshness of a product has a big impact on consumers' perception of quality. To determine product freshness, they use all their senses: smell, sight and touch. But the latest Taste Tomorrow survey also showed that the definitions of freshness are evolving, and it revealed new criteria that impact consumers' perception of quality.

KEY TREND INSIGHTS

Consumers are regaining trust in future food freshness

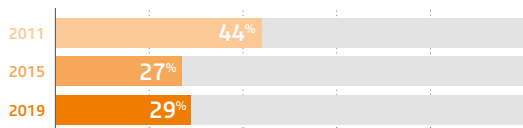
Freshness was and still is a crucial element for consumers. Almost half of all consumers worldwide expect freshness to stay at the same level as today, and 3 out of 10 expect food to become even fresher in the future. After a negative trend between 2011 and 2015, consumers are now regaining their trust in future food freshness. But they are still not as optimistic as in 2011. This tendency is similar to the evolving expectations around health.

A new definition of freshness

The definition of freshness has evolved since 2015. Consumers continue to use their senses to determine product freshness: through smell, sight (the overall appearance, but also seeing the product being made) and touch (the crunchiness of the product).

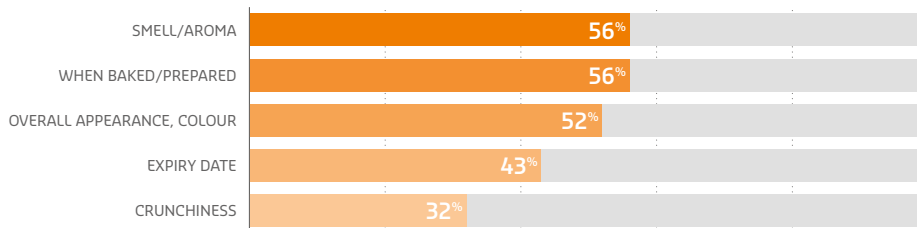
But the survey of 2019 showed also a new criterion that consumers use to judge the freshness of baked goods. They now also associate freshness with the expiration date, or shelf life: the time that a product can be stored without becoming unfit for consumption. This relates directly to how far away in time the product is from the moment it was made.

Expecting more freshness in food in 2030



Defining freshness

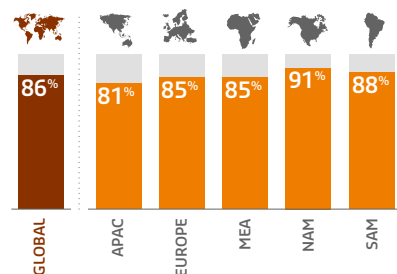
What are the most important aspects of freshness of baked goods and chocolate?



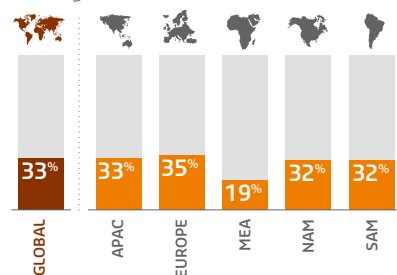
Freshness defines quality perception

How do you perceive the overall quality of the following types of food...

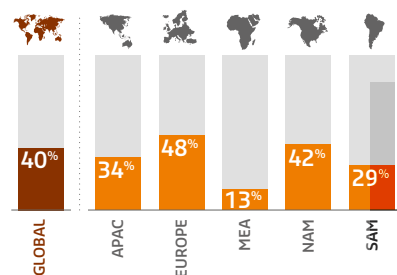
Fresh food



Packaged food

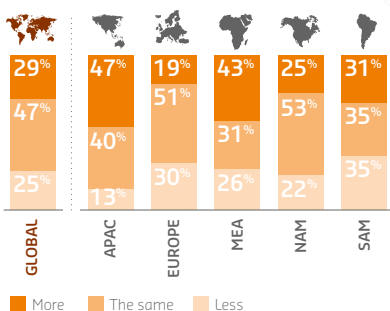


Frozen food



% (very) good quality

Will food become fresher in 2030?



Freshness versus packaged and frozen

The growing importance of the expiration date in the perception of freshness made us curious: how does this impact consumers' perception of packaged and frozen food versus fresh food? Do consumers perceive any differences in quality? The survey reveals that the answer is yes: 86% of consumers clearly perceive fresh food to be of better quality than packaged or frozen food (this is true for food in general). The gap is actually quite large as only 33% of consumers think that packaged food is of good quality and 40% think that frozen food is of good quality.

KEY TAKEAWAYS

FRESHNESS DEFINES QUALITY PERCEPTION

- LET CONSUMERS EXPERIENCE FRESHNESS
- THE SMELL, LOOK AND CRUNCHINESS SEDUCE
- TIME OF BAKING AND A SHORT SHELF LIFE PLAY A KEY ROLE



Freshness: still important, but impacted by COVID-19

Freshness has remained a key factor in consumers' purchase decisions. It's the number 1 criterion in bread, and the number 2 in cakes and sweet pastry. But although still extremely important, freshness is considerably impacted by COVID-19.

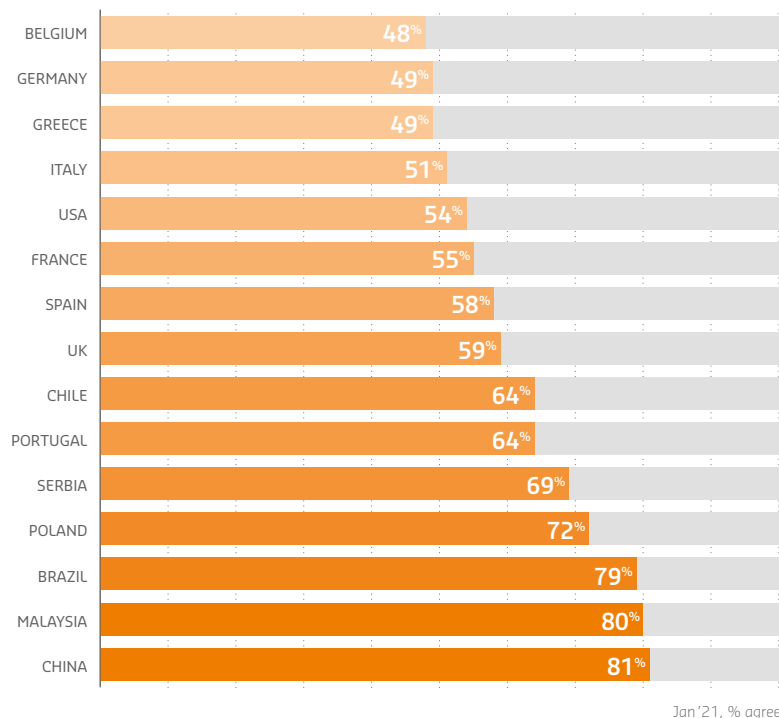
Fresh, but safe please

Consumers all over the world still want their baked goods to radiate freshness. Many of them are averse to additives in food, as they are perceived as 'less natural'. But at the same time, they are afraid of contamination. Especially if products are not packed. Freshly packed baked goods with 1-2 days shelf life are boosted by the coronavirus, as they offer a better guarantee for hygiene.





Packaged baked goods are a better guarantee for hygiene



More popularity for artisan bakers

With freshness still a key purchase criterion, and the strong need for hygiene and food safety, artisan bakers have become more popular. Many consumers consider artisans the most trusted shopping location for hygiene and food safety, even though their baked goods are unpacked.

Un-packed at Artisans is OK

"I only purchase unpacked bread at my local baker, where nobody else could touch it."



CONCEPT WATCH

Cool concepts that preserve and radiate freshness

If it is fresh, it is good. For many consumers, a product's freshness defines its quality. They use all their senses to determine how fresh a product is. Does it smell, look and feel fresh? Next to that, the expiry date has also become key in the perception of freshness. All this information impacts how they perceive the product's quality and whether they decide to buy it or not. These three concepts know exactly how to meet those expectations.

1 Praktik Bakery

Praktik Bakery is located in Barcelona. It is the first hotel-bakery in the world. The bakery is at the heart of this boutique hotel. It enables hotel guests to wake up to one of the best aromas in the world: the smell of freshly baked bread, straight from the oven. It also spreads this same smell throughout the lobby, where the guests arrive. Besides savouring the delicious, fresh fragrance, guests can also see the baking process itself, as it takes place in full view. They can even learn how to bake bread themselves, by participating in a workshop.

*Spain**hotelpraktikbakery.com*

1





2

2 FreshPaper

Tiny but innovative: FreshPaper sheets are a new and award-winning way of keeping your baked goods fresh. Just drop a sheet of FreshPaper bread saver anywhere you keep baked goods (in or out of the fridge). Great for bagels, cookies, muffins, rolls and breads. The sheets are infused with powerful organic botanicals and keep your breads and baked goods fresh for up to 2-4× longer in a natural way, so they also fit into the ethical lifestyle trend. FreshPaper is also available for cheese and fruit and veggies.

 Australia

 freshpaper.com.au

3 Mimica Lab

Consumers want to know how fresh food is before they buy it. The Mimica Lab's labels make this information visible. Their smart labels on food packaging stay smooth as long as the product is fresh. A few hours before the product is no longer fresh, the label will become bumpy. Product expiry dates are subject to numerous health regulations and often indicate a shorter time period than necessary, so many products are thrown away for safety reasons while still consumable. By using smart labels, you can avoid unnecessary food waste and save money. This product also meets the needs of people who look for ways to reduce waste.

 United Kingdom

 mimicalab.com



3



EXPERT VIEW

The multi-sensorial aspect of freshness

According to the Taste Tomorrow survey, freshness defines consumers' perception of quality. Scent, baking time, a short shelf life, look and crunchiness all play a key role in this. This multi-sensorial aspect of freshness is also acknowledged by the global agency International Flavors & Fragrances (IFF). Dirk Goedhart, Marketing Manager and Aksana Sotnikava, Principal Sensory & Consumer Insights Researcher, share their thoughts.

Using uncommon sense to create the best flavours and fragrances is the company's tagline. International Flavors & Fragrances (IFF) is one of the biggest creative producers of flavours and fragrances in the world. They put science and artistry to work to create unique and unexpected scents, tastes, experiences and ingredients.

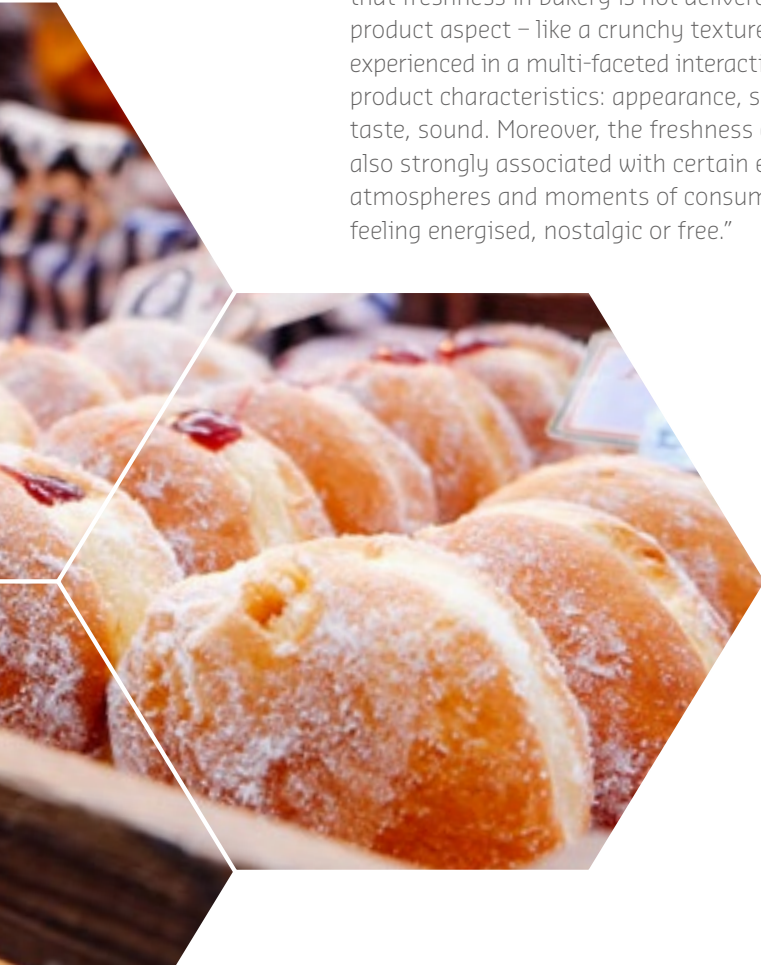
"Freshness in bakery is not delivered by one product aspect, but is a multi-faceted interaction of various product characteristics."





Freshness in bakery is multi-faceted

The multi-sensorial aspect of freshness that was revealed by the Taste Tomorrow survey is also recognised by IFF. Both an online consumer survey¹ and qualitative research² showed similar results. Aksana Sotnikava, Principal Sensory & Consumer Insights Researcher at IFF: “The research revealed that freshness in bakery is not delivered by one product aspect – like a crunchy texture –, but is experienced in a multi-faceted interaction of various product characteristics: appearance, smell, texture, taste, sound. Moreover, the freshness experience is also strongly associated with certain emotions, atmospheres and moments of consumption, like feeling energised, nostalgic or free.”



Sotnikava adds: “We believe the concept of freshness is not a simple point in time. It travels from one *moment of truth* to the next as consumers make judgements about the state of freshness of a food product. These moments of truth can be anything, from a promotion or communication expression, to packaging, a product experience (sensory and emotional) or a repeat purchase. At each moment of truth, consumers use their different senses to make their judgements. Hence, brands need to deliver on all of these moments of truth in order to be perceived as fresh by consumers.”

IFF’s proprietary research with European consumers also revealed that there is not one dominating, all-encompassing driver of freshness in bakery. Dirk Goedhart, IFF’s marketing manager: “We found that freshness is multi-faceted. It means different things to different people. Hence, it should be approached as a total ‘freshness experience’ where product characteristics, consumers’ needs and feelings and consumption occasions all come together.”

¹ The online survey was conducted by IFF in 2015 amongst 825 US & UK consumers aged between 18 and 44 years old.
² Qualitative research (focus groups), conducted by IFF Sensory & Consumer Insights team in UK, NL and ESP in 2019.

*EXPERT VIEW:
Dirk Goedhart and
Aksana Sotnikava
of International
Flavors & Fragrances*



A multi-sensorial freshness experience

To make this come alive, IFF took 300 guests at the Taste Tomorrow event in Barcelona on a multi-sensorial freshness experience. Goedhart explains: "We invited them to open up their senses, open up their mind and open up their taste buds. We showed them in our own special way what flavour and fragrance can bring to the table when it comes to freshness in bakery."

This was done by setting up two entirely different experience rooms. "Each room featured its own menu of next-generation, freshly baked bakery treats prepared by professional chefs. The scent of freshly cut grass or freshly roasted coffee was dispensed as a fragrance, videowalls showed customised videos to support the vibe of each room, and all 300 guests were given headsets with customised music soundtracks from start to finish." By setting the scene in this very specific way, we managed to stimulate all five senses in a short time frame: hearing, seeing, touching, smelling and of course tasting. All this aimed to convey the multi-sensorial aspect of freshness in bakery.

“We believe the concept of freshness is not a simple point in time. It travels from one moment of truth to the next as consumers make judgements about the state of freshness of a food product.”

The experiment was successful and very interesting. “Our guests visited our ‘urban coffeeshop breakfast experience’ or our ‘outdoor lunch experience’ – two radically different set-ups in terms of both content and vibe. This way, they could experience for themselves that freshness in bakery is an incredibly multi-faceted concept which can be achieved when approached holistically and correctly.”



CRAFT





Consumers crave craft

Craft is hot and offers a clear added value to consumers. The Taste Tomorrow survey shows that consumers are even willing to pay more for products that are handcrafted. Artisanal crafted products prove to be very appealing to consumers, because they highly value the work and expertise that the artisan has put in it.

KEY TREND INSIGHTS

Consumers are willing to pay more for handcrafted products

Consumers are happy to pay a premium price for baked goods that meet or exceed their expectations. That was one of the conclusions of the latest Taste Tomorrow survey. One of the values that justifies a higher price is craft: food with a human touch that showcases the artisan's love for the product, and the sharing of tradition and heritage.

Craft adds value. It offers a clear added value for consumers – so clear that a whopping 77% of consumers are willing to pay more for handcrafted products.

Imperfection is perfect

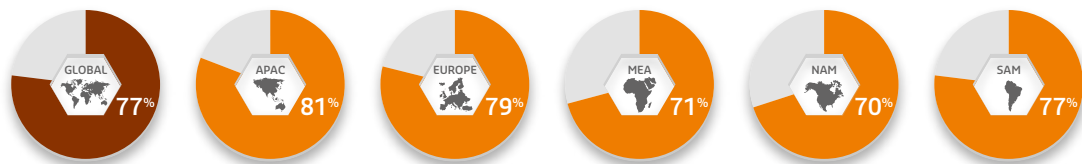
So craft is hot, but how do consumers define craft? Which elements must be present?

The Taste Tomorrow survey shows that certain elements are crucial. Consumers embrace the imperfections of a crafted product; it has to look like it has been created by an artisan and made by hand. Something which is 100% perfect does not always feel artisanal. Consumers appreciate imperfect finished goods – with a slightly different shape, size and look – as they are a result of manual work.

Craftsmanship can be shown in the making but it's also inside the product: natural ingredients and an authentic recipe also define craft for consumers.

Craft adds value

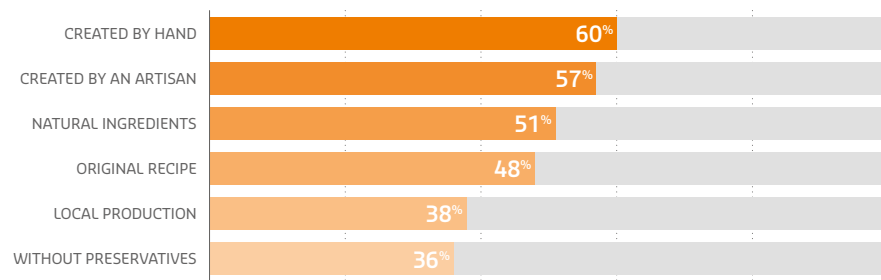
Are you willing to pay more for handcrafted products?



% agree + totally agree

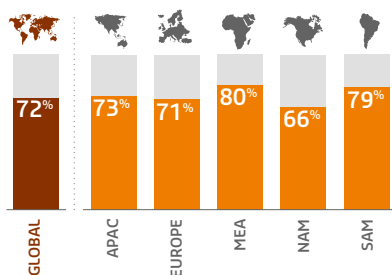
A definition of craft

What makes a product artisanal?

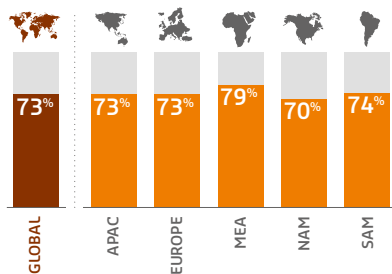


Consumers crave for craft

I appreciate a bakery where I can see the oven and bakery items being baked on site



Food with authentic recipes or production is attractive to me



% agree + totally agree

Show and tell

The perception of craftsmanship can also be influenced by how products are presented: an open oven or seeing how products are finished, enables consumers to see and trust the artisanal production.

72% of consumers appreciate bakeries where they can see the oven and see items being baked on site. And 73% of consumers say they feel drawn to food with authentic recipes or authentic production methods. They love to hear about traditions, heritage and history. The Taste Tomorrow survey of 2015 already showed this love for craft, but in 2019 the figures have increased. So the end of the craft trend is not yet in sight.

KEY TAKEAWAYS

CONSUMERS ARE WILLING TO PAY MORE FOR HANDCRAFTED PRODUCTS

- EMPHASISE THE USE OF NATURAL INGREDIENTS
- SHOW PEOPLE HOW YOU MAKE OR BAKE IT
- SHARE YOUR TRADITION, HERITAGE AND HISTORY



Craft became a synonym for trust

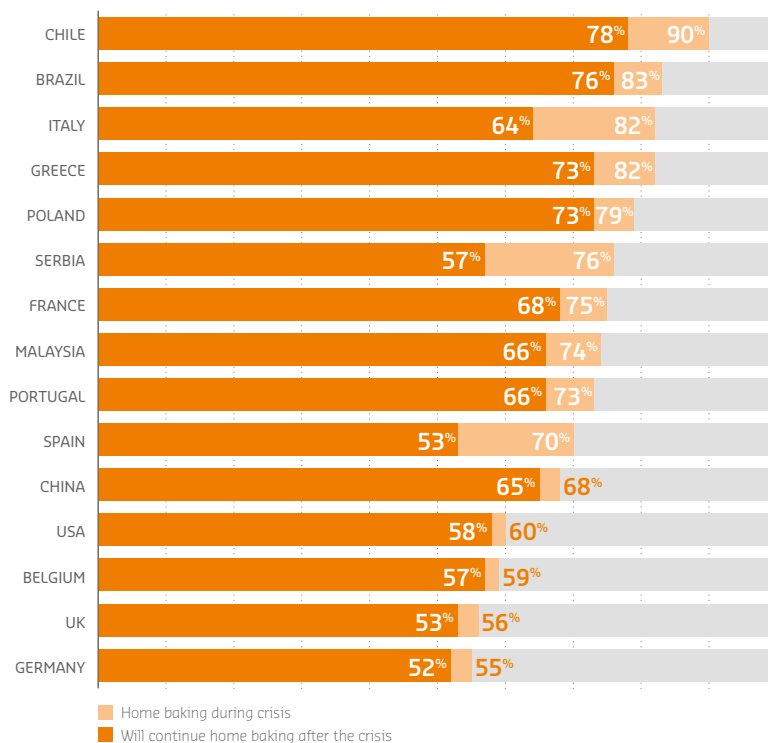
Being associated with natural ingredients and trusted because of the production transparency, craft was hot before the crisis. The trustworthiness of artisans has gotten even bigger during the crisis, making them the winning channel in bakery.

Where many shoppers are no longer comfortable with unpacked breads and cakes in supermarkets (because other shoppers can touch and possibly contaminate them), they rank artisan bakeries high on both hygiene and food safety.





During lockdown periods consumers (re-)discovered home baking



Craft at home:

consumers (re-)discovered home baking

Many consumers re-discovered home baking during the lockdown periode, and most say they will continue afterwards. The main reasons to bake at home are:

- control of ingredients and hygiene
- more healthy
- save money
- great family time
- love of baking

Most consumers prefer baking from scratch, but mixes are also popular. The popularity of home baking increases the need for specific ingredients and online content consumption around homebaking tips and tricks.



CONCEPT WATCH

Cool concepts that showcase their craftsmanship

People love it when you show them how you make things: show your workplace and the production method, and have an oven in plain sight. And if you share your tradition, heritage, history and, most of all, your love of the product and the craft with others, they will love it even more. These concepts know that consumers crave craft and respond perfectly to their needs.

1 Artisan du Chocolat

All the chocolates of Artisan du Chocolat are handcrafted in their atelier in the Kent countryside, where more than 35 passionate artisans, who know their ganaches from their pralines and their caramels from their coulis, are continuously perfecting their craft. Their work ranges from conching and refining their own chocolate bars to supplying Michelin 3-star restaurants.

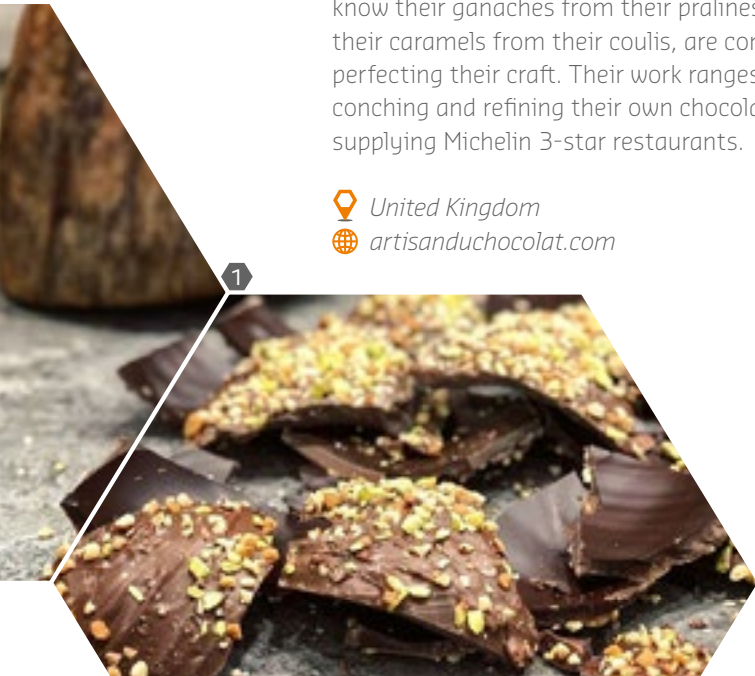


United Kingdom



artisanduchocolat.com

1



2



2 Warren's Bakery

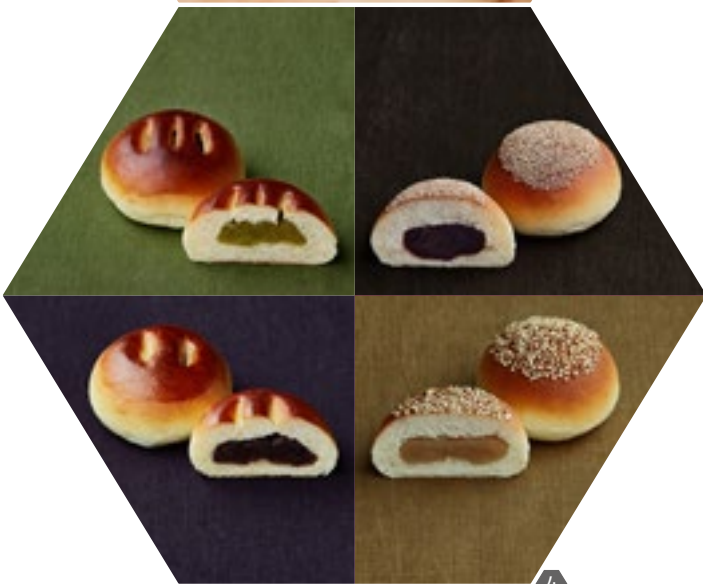
Warren's Bakery has existed since 1860, and claims to be the oldest Cornish pasty maker in the world. In 2018, Warren's Bakery was crowned 'The UK's no. 1 craft bakery'. And while as a business the bakery is growing at a rapid pace, their core values and working practices remain the same as they have always been. They are dedicated to sourcing the best ingredients and producing the finest artisan bakery products. "Nothing makes us happier than using fresh ingredients, trialling recipes and rolling out, kneading or crimping great craft products."



United Kingdom



warrensbakery.co.uk



3 Sea Wolf Bakers

In this brother-owned craft bakery in Seattle, you will find a modest selection of bread and pastry items. They are all prepared by hand and rotate with the seasons. Founders Jesse and Kit Schumann believe that bread should be beautiful and that beautiful bread is a reflection of the craftsman that created it. Their aim is to bring the creativity and diversity of the kitchen into the bakery, source regionally and work with local farmers to emphasise the grains and ingredients of Northwest USA. At the Sea Wolf Bakery, the customer has a clear view of the bakery, that is lodged in a bright and open space. Kit and Jesse foster a community of people who are invested in the production of good food – whether employee, home baker, or bread enthusiast.



USA



seawolfbakers.com

4 Ginza Kimuraya

In Japan, bread was seen as 'Western food'. The texture of the bread, made with hop-based yeast, was too harsh for the palates of the Japanese. That changed when Ginza Kimura's family developed yeast from (rice-based) sake seed and created their unique *Sake anpan bread*. This bread, made with moist dough, quickly became famous. And 140 years later, it still is. The traditional taste and craft of this bread has become part of the Japanese food culture. Nowadays, the Ginza Kimura family sells 130 types of bread in their bakery, including many Western recipes such as French baguettes or Danish pastries. But they remain famous for their classic Sake anpan bread.



Japan



ginzakimuraya.jp

EXPERT VIEW

Staying true to craft

According to the Taste Tomorrow survey, consumers crave for craft. David Redon is what you would call a true craftsman, after he was trained as a Compagnon du Devoir*. A former Puratos International Technical Advisor and now a Consultant in pastry and chocolate, David assists companies in business development and product improvement. We asked David how he believes the craft trend is impacting the world of patisserie and chocolate.

One of the key trends of the Taste Tomorrow survey is craft. To put it more boldly: consumers desire craft nowadays. But how do you define craft? For David it is clearly about manual labour. "To me, craft is something that is realised according to the spirit and hands. The most important aspect for me is the person behind the product and his personality. The philosophy and know-how he puts into a product make it something different and unique."

A tutoring in craft

David's background is in craftsmanship. When he was 15 years old, he began as a student in patisserie and alternated between school and working in an artisanal pastry shop. At age 17, he left home to start travelling with *Les Compagnons du Devoir et du Tour de France*, which is an educational path based on human values and craft trade. "During six amazing years full of travelling, hard work and unexpected encounters, I was able to embark on the path of craftsmanship. Right at the end of my apprenticeship at school, I met a guild member of the Compagnons and he explained everything to me about this association. It really sounded amazing: men living together, learning together, supporting each other, managing their life, all for the same goal of becoming a craftsman. For me as a teenager, it was exactly what I had been looking for, so I jumped right in. I am still very happy that I made that decision, because the values of the Compagnons are today a part of myself. The learning path has been an enrichment on a professional and personal level."





**Les Compagnons du Devoir et du Tour de France*

This is an association where people can learn a craft through the transmission of knowledge, learning about human values, community life and travelling. It resembles a guild of craftsmen of all kinds, in six different trade sectors, such as rural work, food production or construction. The training offers both traditional apprenticeships and higher-level skills training. Trainees move between workplaces all over France – hence the name *Tour de France* – and also abroad. From the age of 15 years, young people can affiliate and begin their *Compagnon lifestyle*. The core requirement is for them to be highly motivated and eager to learn a vocational craft profession. In total, this path takes an average of six or seven years.

For more than 70 years, the association has been providing high quality training. *Les Compagnons du devoir et du Tour de France* has evolved through the years to adapt to modern society: for example, by integrating women, opening up to new professions, adapting training programmes to modern methods and equipment, and being more present on the international stage. However, the fundamental spirit of the *Compagnons* is still there.

EXPERT VIEW: David Redon, Consultant in pastry and chocolate

Open to the public

The Taste Tomorrow research proves that consumers love to see bakery products being created or baked on site. "People like to be able to witness the production process", agrees David. "This follows the fact that people want to have a better understanding of what they consume. Transparency is key. For example, by seeing the ongoing production process with craftsmen at work, and by showing the effort that is put into the product, the impression of homemade and handmade production is reinforced. This has become truly important for consumers today."

This goes for bread, but David believes the same applies to chocolate and pastry. "That is exactly why you see more and more chocolate shops doing their own 'Bean to Bar' chocolate. Often in open spaces, ateliers showcase the artisan's expertise and the very short journey to the consumer. In pastry we also see concepts created around one specific product and made directly in front of the customers – sometimes finished off onsite or decorated on request."

Craft-washing

When a term is used often, it can become subject to inflation. Authenticity is the key factor in this. "I understand that companies are interested in developing a craft-conscious image of their business. It helps make their proposition more relevant and boosts their qualitative image. When doing so, it is important to reflect the reality and not use it solely as a marketing ploy. To me, craftsmanship is by definition something that is not industrialised on a large scale. Being a real craftsman today is quite challenging, resolving to stay small and produce on a human scale in order to be able to do everything by hand and have complete control."

Storytelling

Craftsmanship can be proven by demonstrating your skill, but it can also be highlighted in the communication around the product. During the Taste Tomorrow research, a lot of consumers stated that they find it interesting if traditions, heritage and history are shared. People like to hear the story behind the product. David agrees: "I think it is a good idea to talk about the product's heritage. It is an important part of the seduction when you want to consume a product."

"If I take the example of chocolate, we talk a lot about the Mayans and create stories around their culture and how they used cocoa in ancient times", David explains. "But those are stories from the past. Talking about chocolate today can also be about the producing country, the workers that grow the cocoa plants, and the expertise that makes this product so special and prestigious. Think about the impact of the fermentation on the final taste, for example. That's a real craft!"



“Within our industry we need to make consumers conscious that behind the products and ingredients are the people who are making them, working hard to create the quality ingredients that form the basis of any finished good. The veneration of craftsmen is very important in order to motivate future generations to learn a craft.”

Imperfect products

The Taste Tomorrow results show that consumers embrace the imperfections of a crafted product – when it looks like it has been created by an artisan and made by hand. Consumers appreciate imperfect finished goods – with a slightly different shape, size and look. According to David that is exactly the opposite of what we are educating students in schools. “There we focus on producing consistent quality with uniformity and celebrate mastery of the production process.” This is the same for bakers, patissiers and chocolatiers.

“It is actually contrary to new trends driven by social media”, says David. “People associate the homemade appearance of products created by unskilled persons with ‘artisanal’, which is not right. Actually, the real issue is the fact that industrial products are identical because they are made by very precise machines, so people want irregularities to reassure them that it looks more artisanal, that it is made by hand.”

Staying true to craft in a world of technological advancement

Craftsmanship can seem to be in contradiction with the technological advancement of the modern world. But technology can also enhance craftsmanship. According to David, the line is sometimes very thin between artisan and semi-industrial. “Which artisan is honestly still doing everything by hand? Machines such as the dough sheeter, for example, are everywhere. It is something that every artisan uses and nobody sees that as a problem as it does not remove the skills of the craftsman. It just simplifies the daily work and enables the professional to spend more time on more dedicated and precise tasks that do require certain skills. Technology is an important advancement in our profession and we should use it intelligently”, David says. “We just need to make sure we always have full control over the process and still create products that reflect the personality of the craftsman behind it.”



Trend 5

ETHICAL LIFESTYLE



Food as a lifestyle

Consumers increasingly want to make ethical food choices, taking into account their personal values and the interests of the planet and the people living on it. The Taste Tomorrow survey clearly revealed that the link between food, lifestyle and ethics is proving the old adage: “You are what you eat”.

KEY TREND INSIGHTS

Ethical food choices shape our future

The latest Taste Tomorrow survey shows that food and lifestyle are increasingly linked. Consumers think more about what they eat. They want to act responsibly and eat ethically. Especially millennials want their food decisions to be in line with their ethical values: "I am what I eat, I choose my food carefully!"

Care about the people, the planet and the future

So what do these conscientious consumers care about? The Taste Tomorrow survey clearly shows that responsible eating goes beyond the personal benefit. The main concerns can be summarised into three key subjects: planet, people and future generations.

Consumers strongly feel that we have only one planet. So they highly value sustainably-produced products and increasingly try to limit plastic

packaging when buying food. But they also take into account animal welfare, and fair trade food. These concerns all impact consumers' food choices.

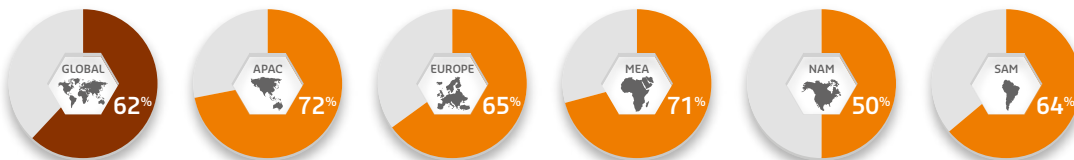
Vote with your fork

Another aspect of the ethical lifestyle is that consumers now care more for other people too. Consumers care for the people and farmers who are involved in the food industry as well as for the environment. That was different in the previous Taste Tomorrow surveys, where it was all about MY sustainability: only making sustainable choices when they could personally benefit from it.

Today's consumers think it is important that farmers receive a fair price for their work and their products. And about 3 out of 10 consumers are determined to adapt their buying behaviour towards more ethical food consumption patterns.

Food as a lifestyle

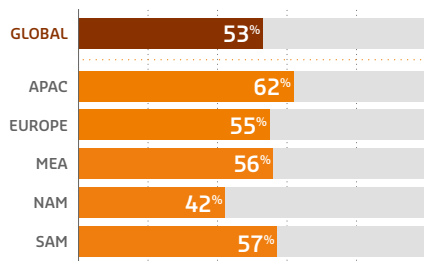
I am what I eat, I pick my food carefully!



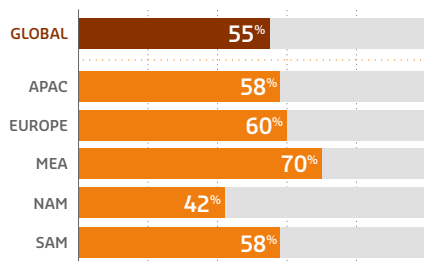
% agree + totally agree

Care for the environment

I look for food for which I know farmers receive a fair price

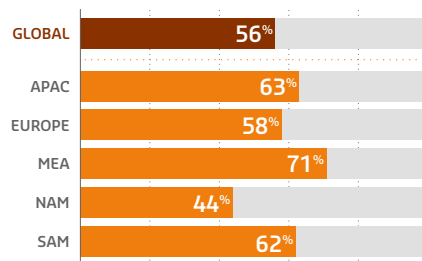


I limit plastic packaging when buying food

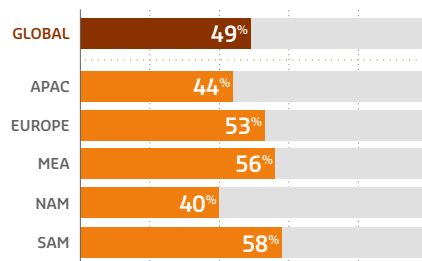


% agree + totally agree

I look for sustainably produced products (with care for the environment)

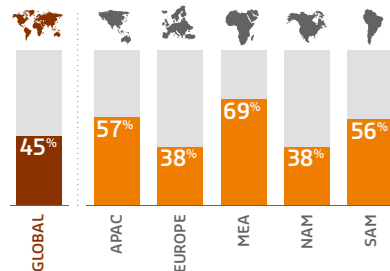


Animal welfare is a priority for me when buying food

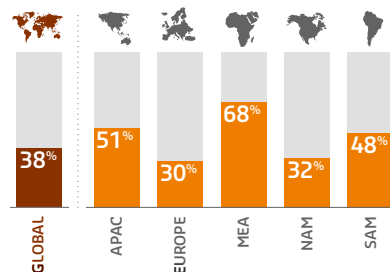


Plant-based is the way forward

Vegan food has a positive impact on the environment



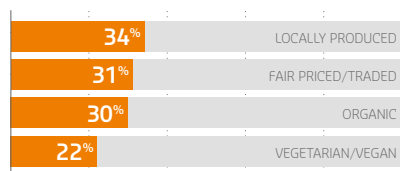
Vegan food is healthier than regular food



% agree + totally agree

Ethical food choices shape our future

Do you think you will buy <<...>> food, less, the same or more in the future?



% expecting to buy more

Plant-based food is the way forward

Vegan, organic and vegetarian eating are an ongoing trend and clearly part of an ethical lifestyle. Many consumers believe vegan food has a positive impact on the environment. But next to that, veganism is also believed to have a positive impact on health.

KEY TAKEAWAYS

FOOD, LIFESTYLE AND ETHICS ARE CLOSELY LINKED

- PLANT-BASED FOOD IS HEALTHY AND GOOD FOR THE ENVIRONMENT
- FARMERS SHOULD RECEIVE A FAIR PRICE
- LOCALLY SOURCED FOOD AND ZERO-WASTE PACKAGING ARE IMPORTANT



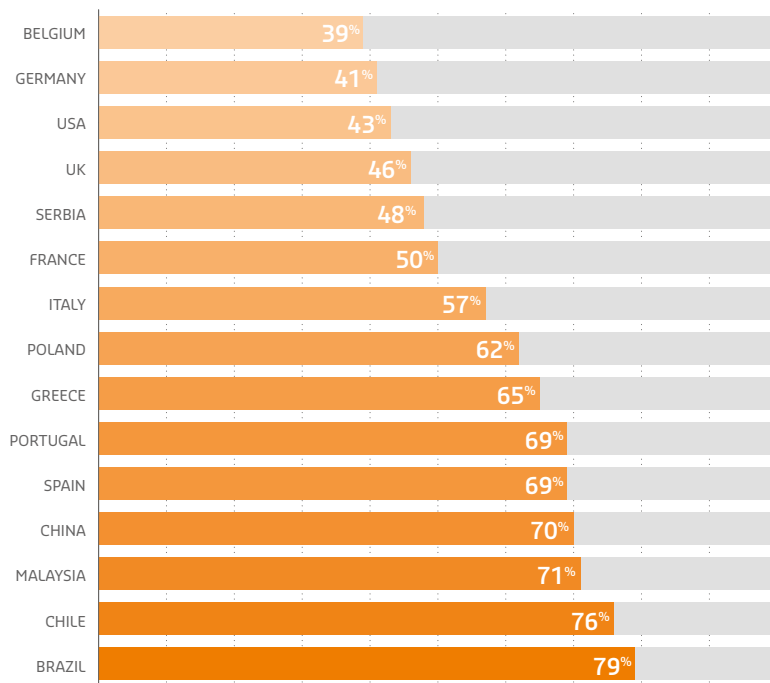
Growing need for sustainable and local products

Food, lifestyle and ethics are closely linked, and our research indicates that after the crisis, a sustainable lifestyle will be more important than ever. Consumers are turning more and more towards plant-based food, they prefer locally sourced food and zero waste packaging, and they want farmers to receive a fair price. The need for an ethical lifestyle became more urgent during the crisis and will continue to be so.

Sustainable solutions become key on global level

The unstable situation in the world makes 79% of consumers worldwide willing to seek products which are healthier and better for the environment. 65% of consumers worldwide supports a 'green' economic recovery from COVID-19. Many customers are willing to pay a superior price for products that are fair to humans, and are produced in an environmentally friendly way.

*I am seeking out products from companies that show to be **more caring***



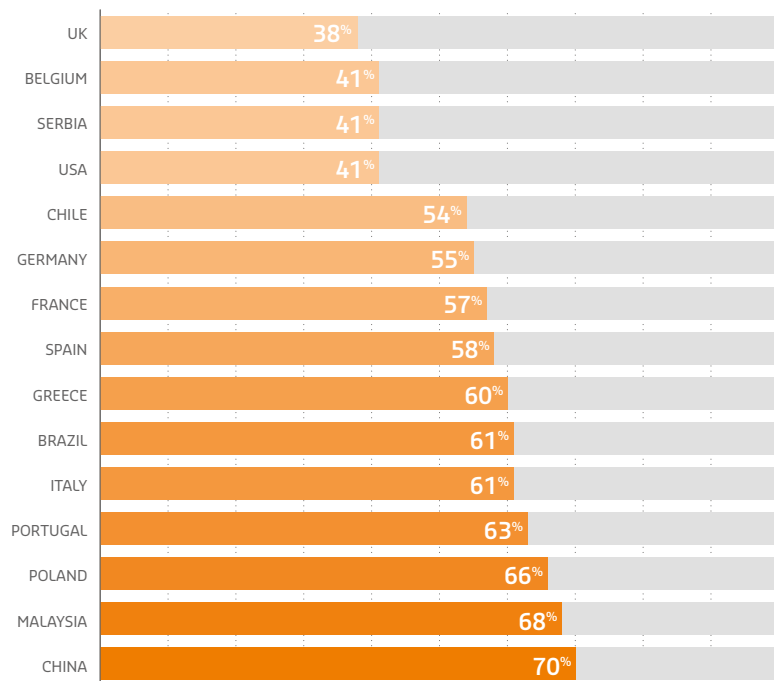
Jan'21, % agree



Preference for local products

Many consumers prefer to buy locally sourced products. Their preference is not only about reducing the CO₂-footprint, but it's also driven by the wish to support local business and ensure supply chain continuity, relying less on imports. And moreover, they agree that products made with local ingredients are more trustworthy, more authentic and healthier.

*% agree a product made with local ingredients is more trustworthy**



Jan '21, % agree

* Local: the question for Germany, Serbia, Poland and China was: 'a locally bought product is more trustworthy'



CONCEPT WATCH

Cool concepts that reduce food waste

Today's consumers are more conscientious. Their desire to live an ethical lifestyle is closely linked to sustainability. Consumers value sustainably produced products, limiting plastic packaging and promoting zero-waste packaging. As almost 90% of respondents in the Taste Tomorrow survey expect food shortages in the future, they are looking for potential solutions to adopt. Reducing food waste is one of them. These concepts do their utmost to reduce the amount of food wasted.

1 FoodMaven

FoodMaven believes it is unethical to throw away fresh, wholesome and nutritious food while so many people are hungry. That is why they sell excess or faulty supplies of high-quality local produce to restaurants and institutional kitchens. FoodMaven is an innovative online marketplace and logistics company bringing flexibility to the U.S. food system. Think crooked cucumbers, small-sized strawberries, scratched tomatoes and so on. FoodMaven donates all unsold food to food banks, ensuring that quality food ends up in hungry mouths rather than in landfills.



USA

foodmaven.com

2 Imperfect Produce

Imperfect Produce is basically the same concept as FoodMaven, but aimed at consumers. They fight food waste by finding a home for 'ugly' produce. More than 20% of the fruits and vegetables grown in America never makes it off the farm because they are not perfect enough for grocery store standards. That generates billions of pounds of wasted produce every year. Produce that is just as nutritious and delicious but merely looks a little different. The content in the boxes of imperfect produce they supply to consumers, can be customised. So if you do not like kale, you will not get kale. This means they only deliver items the customer likes, thereby doing even more to prevent food waste.



USA

imperfectproduce.com

3 ReGrained

This company rescues the nutritious leftover grain created in the process of brewing beer, and upcycles it into SuperGrain+ flour using their patent-pending technology. With this flour, they produce all kinds of bars that contain inherently functional ingredients, like the Honey Cinnamon IPA Immunity Bar, the Chocolate Coffee Stout Energy Bar and the Blueberry Sunflower Saison Antioxidant Bar. This way, they make doing and feeling good as easy as eating a snack. And it does not stop with bars. From savoury to sweet – the possibilities with this upcycled grain are endless.

📍 USA
🌐 regrained.com

4 Toast Real Ale

Another beer-related concept is Toast Real Ale. This artisanal brewery makes ale from upcycled bread. They collect leftover bread from retailers and artisanal bakers and use it to create a premium ale. It is a small-batch produced specialty beer, so they are not only responding to the ethical lifestyle trend, but to the craft trend as well.

📍 United Kingdom
🌐 toastale.com

5 BarstensVol

This concept offers a line of convenient, ready-to-heat sweet pepper, courgette, mushroom and tomato soups, made from overripe or excess produce. BarstensVol's recipes are specifically developed to use up produce that is commonly discarded. The recipes are prepared at De Verspillingsfabriek (The Surplus Food Factory), which employs people that have a disadvantage on the labour market. Their ready-made products come in transparent packaging, serving two to three persons. Fair and delicious meals, ready to heat and eat.

📍 the Netherlands
🌐 barstensvol.nl



5



4

EXPERT VIEW

Food is at the centre of everything

One of the key trends of the Taste Tomorrow survey is ethical lifestyle. Consumers want to act responsibly and, as food and ethics are closely linked, they want to eat ethically as well. An increasing number of consumers are concerned about the growing world population. How will we be able to feed the world? Now and in the future? Change is needed in our food system to make it future-proof. That is why Marco Gualtieri* founded Seeds&Chips, the largest food innovation event in the world. "Collaboration is key to transforming the food system for a more sustainable future."



"Collaboration is key to transforming the food system for a more sustainable future."

The FAO (Food and Agriculture Organization of the United Nations) estimates that food production needs to increase by 60-70% to feed around 9.2 billion people by 2050. This raises the question: where is food for all these people going to come from? The Taste Tomorrow survey shows that almost 90% of consumers expect food shortages in the future. Consequently, this is a worry for consumers and they are open to solutions. According to the Taste Tomorrow study, more efficient agricultural technologies and food-waste minimising technologies are the first solutions to consider in fighting worldwide food shortage.

Gualtieri confirms: "The problems are very serious, and change is in everyone's interest. Food is at the centre of everything, and many people are aware that these issues do not only concern nutrition but every aspect of our lives. Seeds&Chips (S&C) wants to drive innovation capable of changing the shape of cities, the opportunities for accessing food for all, and quality of life."

It takes one spark to change the world

Aiming to create something that could really generate an impact, Marco Gualtieri founded Seeds&Chips – The Global Food Innovation Summit – six years ago. It functions as an international meeting point for innovators, influential experts and global leaders from the public and private sector to develop and implement solutions for the most pressing issues in food production and the broader supply chain.

“The summit brings thousands of innovators together from all over the world to build a better food system for all”, explains Gualtieri. “It showcases the latest ideas and state-of-the-art technologies that hold the potential to transform our food system – and help achieve the targets set by the United Nations in the 17 Sustainable Development Goals (SDGs). Setting the stage for big and small players to come together gives great minds the opportunity to make their voices count. It takes just one small spark for the next big idea to catch on around the world.”

* Marco Gualtieri was a keynote speaker at the Taste Tomorrow event in Barcelona

SUSTAINABLE DEVELOPMENT GOALS



EXPERT VIEW:
Marco Gualtieri,
founder of Seeds&Chips

"We decided to put the leaders of the future – we call them Teenovators – at the centre of the debate, as their contribution is fundamental in the search for solutions."



Transforming the food system for a more sustainable future

In the vision of S&C, collaboration is key to transforming the food system for a more sustainable future. "We bring everyone together. Start-ups come to show their innovations to investment funds and companies that are interested in growth and development through external lines. Institutions and international organisations join us in having an additional sounding board for their initiatives. Together they are able to develop synergies and new business potentials."

Teenovators: the voices of tomorrow

In 2017, when Seeds&Chips hosted former US president Barack Obama at the Milan Summit, they launched the 'Teenovators': young people under 18 who open the summit sessions with their thoughts and visions. "We decided to put these leaders of the future at the centre of the debate, as their contribution is fundamental in the search for solutions. They are the key, but also the engine for a generation that is much more aware and committed to the issues at hand, as Greta Thunberg's example teaches us. Their voices are crucial in the development of solutions to the global challenges they will inherit. With their choices and efforts, they will help humanity transition to a better food system."



Evolution of the ethical lifestyle

In the opinion of Gualtieri, the ethical challenges of sustainable development are mainly due to the innovation of the food supply chain – a necessity, but at the same time, also a great opportunity. In fact, sustainable innovation is necessary and fundamental for the competitiveness of our food system. And at the same time, in this process of change there is a new economic sector that can create employment and wealth: “Understanding the important link that exists between ethical choices and opportunities for economic growth is the key to understanding the development of the coming decades.”

Trend 6

TRANSPARENCY



A woman with brown hair, wearing a blue and white floral shirt, is seen from the side, looking at shelves in a grocery store. The shelves are filled with various packaged goods, including bags of chips and other snacks. The image is overlaid with several white hexagonal shapes of different sizes. The main title is centered within one of these hexagons.

Clear labels provide transparency

The vast majority of consumers regularly reads the information on the packaging of the finished goods they buy. They look for clues to reassure themselves about the quality, the ingredients used and the sourcing. Clear labels and information from field to fork help provide the transparency they ask for. But what specific information are they looking for, and how can you best respond to this transparency trend?

KEY TREND INSIGHTS

Consumers want transparency from field to fork

The Taste Tomorrow survey reveals that consumers are seeking more and more information about the products they consume. Globally, 91% of consumers read the information on the packaging.

On-pack information

Consumers check the product label to be informed or to be reassured. But what exactly are they looking for? Most of them look for information on ingredients and nutritional value (what is in it?), and additives and claims (is it healthy?). But it is not just about ingredients: consumers require transparency in the entire food supply chain, from field to fork. So they also look for the source of the product and its ingredients.

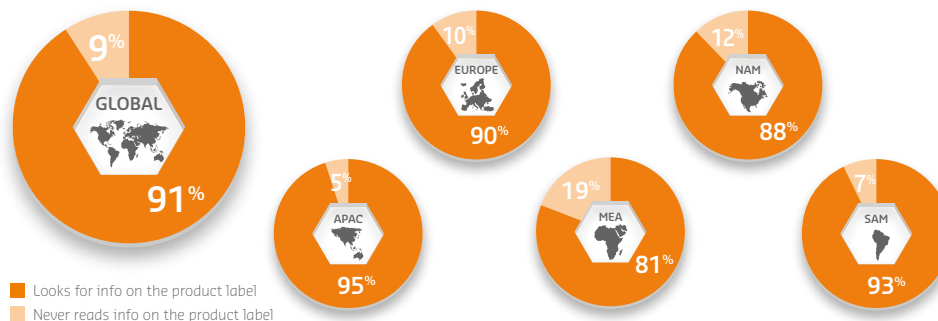
What information is most important for consumers, depends on the region in which they live.

Storytelling needs to go beyond packaging

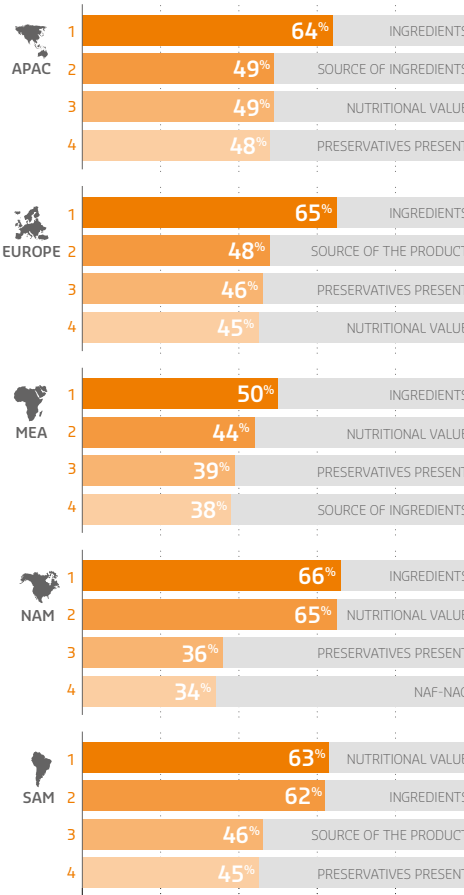
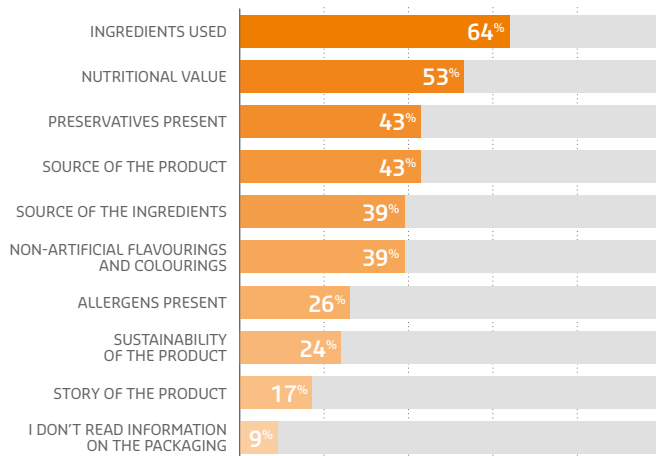
It is apparent that clear product labels on packaging are crucial. The survey also indicates that most consumers are interested to hear more about the craft, the history and heritage of a product or its maker. However, they do not necessarily look for that information on the package.

The point is that on the packaging, consumers look for fact-based information. To create a bond with the consumer, you will need to tell your story beyond the packaging and create a next level experience for consumers.

Consumers do read product labels

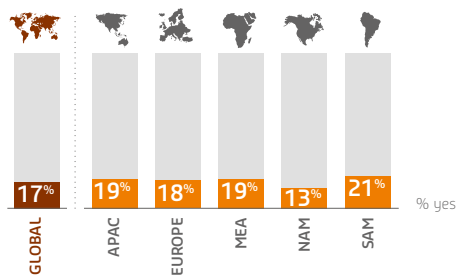


What type of information on packaging matters?

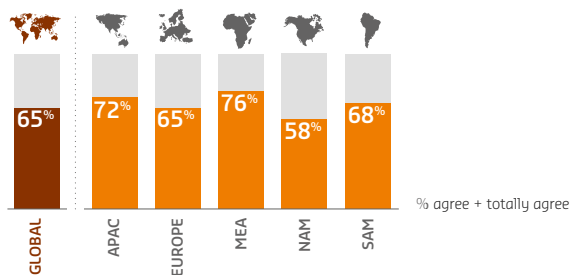


Storytelling goes beyond packaging

I look for the story of the product on the packaging



I like to hear more about the tradition, heritage and history of a product



KEY TAKEAWAYS

CLEAR LABELS REMAIN KEY

- INGREDIENTS AND NUTRITIONAL VALUES ARE READ
- TRANSPARENT SOURCING IS ESSENTIAL
- CONSUMERS LOOK FOR THE PRESENCE OF ADDITIVES AND CLAIMS



Transparency: clear labels and food traceability wanted

Clear labels are more important than ever. 57 percent of consumers worldwide regularly checks products for the ingredient declaration, to see if:

- it's made from natural ingredients only
- its locally produced
- the origin of the different ingredients is clear





Fresh LOCAL Produce

Growing demand for food traceability

There's also a growing consumer demand for food traceability: the ability to track a product from farm to store. Large retailers like Carrefour and Walmart turn to blockchain to provide that service for their customers, allowing them to scan a QR code in the store to learn detailed information about a product, like when and where it was harvested.



CONCEPT WATCH

Cool vegan concepts that focus on transparent sourcing

To meet the consumers' need for transparency, transparent sourcing is essential. Of course, this need for transparency is not reserved to vegans. However, vegan consumers do tend to be more demanding when it comes to food suppliers being transparent in their sourcing information. These vegan concepts provide their customers with the transparency they require.

1 Bobo's

The story of Bobo's began in a small kitchen, where Bobo and her mother Beryl baked healthy oat bars, from whole grain oats, a little bit of organic cane sugar, a touch of vegan buttery spread, and some brown rice syrup. The bars tasted so good, that Beryl took them to a few local cafes and grocery stores around town. Long story short, Bobo and Beryl are now baking for thousands. Besides the oat bars, Bobo's also bakes stuffed bars, oat bites and toaster pastries. All products are still handmade, using clean, wholesome ingredients.



USA

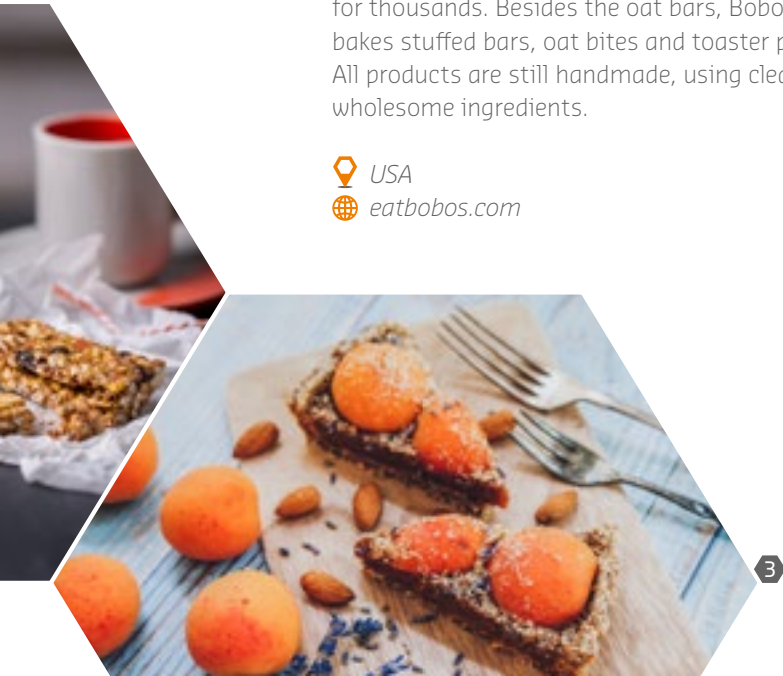
eatbobos.com

2 Barnana

At Barnana, they believe that the banana is mother nature's original energy bar. And so, they use bananas to create delicious, convenient and flavourful snacks, only adding ingredients grown in soil that is alive with nutrients, with no preservatives and nothing fake. To eliminate food waste, they take the 'imperfect' bananas from organic banana farms – bananas that are a little too ripe, have scuffs or are not the perfect size; i.e. bananas that are typically rejected for export – and upcycle them into very tasty snacks. All are dairy-free; some are vegan, some vegetarian, some paleo, some kosher, some gluten-free.



USA

barnana.com

3 Naspolya Nassolda

The raw vegan desserts and sweet treats from the Hungarian concept Naspolya Nassolda are very popular. Using only natural, plant-based ingredients and baking nothing above 42°C, they make delicious cakes, desserts and sweet treats to take away. Everything is made without sugar, gluten or dairy products. They use dehydrated buckwheat, seeds and dried fruit instead.

📍 Hungary
🌐 naspolya.hu

4 Malk Organics

Born with a severe dairy allergy, August Vega always struggled to find foods that would not make her sick. When her son was born with the same allergy, she decided to create a good dairy alternative and founded MALK Organics: products that are dairy-, soy-, gluten-, GMO- and lactose-free, and vegan friendly. All the MALKs are made with six ingredients or less, more than one cup of sprouted organic nuts in every bottle, and are cold-pressed with the latest technology to retain all the nutrients without losing any of the flavour.

📍 USA
🌐 malkorganics.com

5 OHi

OHi's founder Dawn lived on energy bars for years, believing it to be the "healthy" choice for convenient snacks in her busy life of travel. But as she began to educate herself about nutrition and clean, healthy living, Dawn realised the standard energy bar packed with chemical additives and unwanted ingredients were not her best choice. She then made it her mission to develop a clean, whole-food, delicious tasting bar that would leave her feeling nourished and satisfied: the OHi Superfood Bar. The OHi bars are plant-based, gluten-free and grain-free, and they are available in different flavours.

📍 USA
🌐 ohifoodco.com

6 Bakkers Bakery

This vegan bakery offers vegan brownies, cakes, bliss balls, energy bars and banana bread to Dutch restaurants and caterers. The bakery focuses on vegan ingredients and has taken out the refined sugar. Many products are even produced 'raw', which means that they are not heated above 42°C, so all the enzymes, minerals and vitamins are preserved.

📍 the Netherlands
🌐 bakkersbakery.nl

7 One Degree Organics

This family-owned business believes in the connection between healthy soil, healthy plants and healthy people. They source their ingredients by travelling to (small) farmers and producers who use sustainable plant-based methods. They back this transparency with their source code technology, making it possible for consumers to trace every ingredient and meet the farmers and producers dedicated to organic, sustainable, plant-based cultivation.

📍 USA / Canada
🌐 onedegreeorganics.com



When asked, the vast majority of consumers state that they read the information on the food packaging they buy. Labels as well as the packaging itself are increasingly important means of communication. We asked two experts how they see the future of food packaging.

EXPERT VIEW: *Peter Ragaert, project manager at Pack4Food*

“The role of packaging will become even more important”

What are the main trends in food packaging?

“I see three main trends that will define the future of food packaging. The first trend is society moving into a *circular economy*: a system where there is no waste. Packaging should thus be reusable, recyclable or compostable. In fact, in the long term, incineration will no longer be an option. We should recover all packaging materials at the end of their lifecycle, and transform them into new resources. That is easier said than done, as a lot of packaging contains multi layers or is composed of different materials, which makes it a lot more difficult to recycle. To tackle this, I see two main solutions. On the one hand we will need to focus as much as possible on creating mono-material solutions. Secondly, we really need to try and avoid multi-layered plastics.”

Pack4Food is a non-profit organisation, bringing together companies throughout the food packaging chain, research institutions, as well as governmental organisations and federations. Pack4Food aims to stimulate innovation in food packaging from both food producers and their suppliers. Next to that Pack4Food supports companies in their everyday packaging challenges.



"A second main trend is *smart packaging*. That is a type of packaging that can provide you with extra information that is not visible on the package itself. There are various types of smart packaging, such as packaging that is able to monitor its environment, using sensors that measure the temperature or relative humidity. Certain types of smart packaging can also monitor the product quality itself. A sensor inside the packaging can then measure for example the aroma that is coming from the product. These techniques will further evolve."

"A third main packaging trend is everything around *logistics*, especially in the field of e-commerce. One example is packaging that is directly linked to the internet (IoT). Packaging can communicate with both the supplier and consumer, providing them with relevant real time data. You might be able to see where the packaging is at a certain moment, what its temperature is, and if it has been opened or not. Of course this is closely related to the smart packaging trend."

What are the most important trends in food labeling?

"As my expertise is focused on packaging technology, I look at food labeling from that perspective. Technology can provide new possibilities. In general, we can expect new techniques being used to provide additional information to consumers. More and more information should be put on the label, while often there is not enough space for it. Smart technology is introduced to inform consumers in yet another way, such as by using QR codes, digital watermarking or NFC tags."

"There is a growth in the use of QR codes, and in fact they are extending their functionalities. Traditionally these codes can be scanned by the consumer and then link to a website or app with additional information, for example a preparation suggestion or information about a product's origin – where, how and by whom it has been made. In the future these codes will also be used to serve as an anti-fraud filter, as a simple way to prove authenticity."

"Another very important trend is labeling that is not visible to the consumer. Different companies are now experimenting with printing digital watermarks on the packaging that cannot be seen by the naked eye, but can be detected with special cameras. This can be used to improve the sorting of different materials, but you can also add a certain code that serves as a product authenticity key as well. It is an evolution we see in those digital watermarks."

"A third example is NFC technology. NFC is short for Near Field Communication. It is a technique used for contactless payments, but it has many other applications. Think for example of adding a NFC tag in the cap of a bottle. When consumers hold their smartphone very close to the bottle the smartphone will open a website. On that website you can fill in for example a number that is on the label (or a code) and an online database can check if that bottle is authentic or not, or provide other relevant data."

Fueled by the consumer demand for transparency, we see a growing demand for cleaner labels. What are the consequences for the packaging industry?

"The consequences are in fact quite large. Certain additives that have now been reduced provided a function in the original product formulation. They were needed to ensure a certain shelf life. When you decrease those additives, or you decrease the salt or fat content, you have to make sure that you can safeguard the same shelf life in another way. That is where food packaging can play an important role, as it can protect the food product from oxygen, water, light and so on."

"This means that the role of the packaging will become more important in the future. In fact to compensate for the cleaner label we have to use more complex packaging materials to have the same shelf life. So a cleaner label might have a negative impact on the environmental impact of the packaging. This is a delicate equilibrium. Creating a cleaner label or making changes in the packaging should never lead to more food losses, as food waste is always the most harmful to the environment."

This is an extract of the interview with Peter Ragaert, project manager at Pack4Food and a professor in packaging technology at Ghent University. Read the full interview on tastetomorrow.com/Packaging1



EXPERT VIEW: *Roland ten Klooster, professor in packaging design & management*

“Companies should provide an honest explanation of their packaging choices”

What is the most important trend when it comes to food packaging?

“When it comes to choice of material, the market is currently mainly driven by fear. Pressured by public opinion, companies want to eliminate plastic and switch to all kinds of coated paper and cardboard alternatives. They sell it as a circular solution, while in fact their carbon footprint often is increased. Of course, they do not want to hear it. The irony is that coated cardboard is difficult to recycle and inflates the carbon footprint by adding a huge amount of packaging weight.”

Do consumers and companies fully understand the consequences of their packaging choices?

“Take the single use plastics prohibition for instance, and all developments resulting from it. Suddenly, large companies are taking huge steps without understanding the consequences. Often it is not clear whether or not this is an improvement in terms of LCA (life cycle assessment). But they go ahead and do it anyway. A lot of consumers think that paper and cardboard do not do any harm when they end up in the environment, and that they simply decompose on their own. But with all the coatings being used, we are actually introducing a huge amount of microplastics into the environment within a very short period of time.”



Roland ten Klooster has been a part-time professor at Twente University since 2006, with a focus on (functional) packaging design. In addition, he works for Plato Product Consultants, a consultancy that advises companies on packaging where he is contributing to the development of new packaging solutions. He (co)authored various books including “Packaging Design Decisions: A Technical Guide” published in 2018.

"Another example, to illustrate the complexity, is the popularity of ready-to-cook meal packages in the supermarket or fresh box subscriptions where the consumer receives a weekly box with a measured amount of ingredients delivered to their home. Such a meal package may contain half a cauliflower, bell pepper cut into strips, a portion of rice and some freshly ground herbs. This perfectly meets the consumer's demand for convenience, but meanwhile these packages can create up to 50 grams worth of additional packaging material compared to just buying all these food items individually. This equates to four regular shopping bags, just for a single meal. People do not thoroughly think this through."

What are the greatest challenges in improving the sustainability of food packaging, for example that of bake-off bread?

"Bake-off bread is often gas-packed in plastic. Most baguette packaging is thermoformed: film is heated up and a cavity is blown into it to create room for the bread. This type of packaging contains nylon in order to guarantee a shelf life of at least six months. Unfortunately, nylon is such a rarely occurring material that it is not being recycled. The greatest challenge is essentially not to improve the sustainability of the packaging, but to make sure we start to question the six-month shelf life. If we could be comfortable with a shelf life of seven days or several weeks instead of six months, this would allow us to work with recyclable material. But this requires a great deal of consumer awareness and behavioural change."



"Once we eliminate the idea that bake-off bread has to keep for six months, a lot of sustainable packaging alternatives emerge. If you think about it, there is really no need to buy a baguette today only to prepare it six months later. The industry has designed certain solutions and consumers have gotten used to the convenience. But a long shelf life like that is not always a necessity, especially as we are achieving shorter chains with fewer transportation kilometres. If we source our food more locally, there is no need to have our cheap bake-off baguettes carried halfway across the globe."

What is the food industry's best chance of improving its sustainability?

"What will become crucial for companies in the years to come is that they start taking the role of packaging seriously and provide consumers with honest explanations about their choices. They have to become fully transparent in that regard. Not by loosely stating 'we choose paper or cardboard because it is environmentally friendly'. But by saying 'we choose material x because we have researched it thoroughly and according to the independent lifecycle assessment, it has the lowest long-term carbon footprint.' This is the only way to find truly sustainable packaging solutions."

This is an extract of the interview with Roland ten Klooster, professor in packaging design & management. Read the full interview on tastetomorrow.com/Packaging2





From data
to recipes



How can we convert consumer research data into inspirational and profitable suggestions for finished goods? That is the challenging assignment that we set our team of technical advisors. They have created a versatile and mouth watering range of recipes, based on the nine consumer trends that were distilled from the Taste Tomorrow research.



- 1 Taste: Strawberry
- 2 Health: Bite Root
- 3 Freshness: Multigrain Bread
- 4 Craft: Fusion Focaccia
- 5 Ethical lifestyle: DIM's
- 6 Transparency: Smoked Grains Knot
- 7 Ultimate convenience: Tube Cake
- 8 Next level experience: Chocolate Easter Egg
- 9 Hyper personal: Moodballs



TASTE



Strawberry

Taste has become the most important factor for consumers when buying bakery, patisserie and chocolate and texture is a key component too. They like traditional and exotic flavours that contribute to their tasting experience. This indulgent strawberry-like croissant offers a melting feeling, using Mimetic instead of butter.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
strawberry](http://www.tastetomorrow.com/strawberry)

INGREDIENTS

100% **Total flour weight**
100% Wheat flour
44% Water +/-
2% Salt
8% Sugar
5% Fresh yeast
5% *Sapore Carmen**
5% *Mimetic Incorporation**
1% *S500 CL**
50% *Mimetic 20**

Filling

Q.S. *Puratos Topfil Finest Strawberry**
Q.S. *Carat Coverlux White**
Q.S. *PatisFrance Decofondant**

Bicolor

- 0,2% Red colorant
- Take out 425g of dough and mix with 2g red colorant.
 - Freeze then keep at 4°C until used.

Decoration

Q.S. *Sunset Glaze**
Q.S. Syrup
Q.S. Strawberry coulis
Q.S. White chocolate (melted)
Q.S. Green leaf of decofondant

WORKING METHOD

Mixing spiral

4 minutes at slow speed,
4 minutes at fast speed.

Dough temperature

18°C.

Freezing

30 minutes at -20°C.

Lamination

2 double folds on uncoloured dough.

Cooling

30 minutes at 4°C.

Make up

For large croissants (55g)

- Place the coloured dough on top, then roll out at 2,7 mm.
- Cut triangles of 25x9 cm, then cut in half.

For small croissants (20g)

- Roll out at 2 mm.
- Cut triangles of 17x6,5 cm.
- Roll in croissant then cut in half.

Final fermentation

120 minutes at 28°C / R.H. 85%.

Before baking

Brush with Sunset Glaze.

Oven temperature

210°C in deck oven with initial steam.

Baking time

14 minutes for large ones,
9 minutes for small ones.

Decoration

- After baking glaze with syrup.
- Pipe some strawberry coulis inside and dip the side in white chocolate.
- Decorate with green leaf of sugar.

Tip for the filling

Mix the Topfil Finest Strawberry to make it more fluid.

This recipe was developed and created by Cyril Hervé, International Technical Advisor for Bakery.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.

INGREDIENTS

Organic red apple

32 pcs Organic apple 'cox orange' (ø 5-6 cm)
800 g Fresh organic beetroot juice

Cream cheese mousse

40 g Milk
150 g *Festipak**
½ pc Vanilla
1,5 g Orange zest
40 g Sugar
10 g Gelatin powder 180 bloom
60 g Water
150 g Yoghurt
500 g *Passionata**

Acidulate beetroot & raspberry jelly

150 g Beetroot juice (from baking)
270 g *Starfruit raspberry**
30 g Sugar
4,5 g Pectin NH

Raspberry crumble

300 g Flour T 45
240 g Sugar
80 g Dried raspberry powder
280 g Butter
100 g Almond powder
2 g Salt

Decoration

Q.S. *Miroir Glassage Neutre**
Q.S. Fresh edible cress

WORKING METHOD

Organic red apple

- Use 4 vacuum bags of 400 x 300 mm.
- Remove the tail, peel apples and remove the center with a round dough cutter of 3 cm.
- Put 8 apples in a vacuum bag, add 200 g of beetroot juice, vacuum and seal at 85%.
- In an oven, bake at 80°C with 100% steam during 25 minutes.
- Let cool down in the bag, remove and drain out the extra juice and reserve it for the jelly.

Cream cheese mousse (15 gr/apple)

- Bring to a boil the Festipak, orange zest and vanilla, then add the gelatin and pour over the yoghurt.
- Mix and incorporate the lightly whipped Passionata at around 26°C.
- Fill the center of cold apples and let it set.

Acidulate beetroot & raspberry jelly

- Bring to a boil the juice and puree, at 60°C add pectin mixed with sugar.
- Stop cooking and cool down around 35°C, then pour on top of the cream cheese mousse, till the top.

Raspberry crumble (30 gr/plate)

- Mix everything together, sprinkle on a tray and bake at 160°C, open damper, during 20 minutes.
- Mix it several times to bake uniformly.
- Cool down and reserve.

Decoration

- Glaze the whole apple using Miroir Glassage Neutre at 35-37°C.
- Decorate using fresh edible cress.



This recipe was developed and created by David Redon, previously International Technical Advisor for Patisserie at Puratos.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.



Bite Root

Health in food is not only about removing ingredients that are undesirable for certain reasons, it is also about adding ingredients that can contribute to a better health. In this Bite Root recipe, the apple is used as a whole and is infused in red beetroot, which acts as a natural sweetener. The cheese cream provides a refreshing taste while the raspberry crumble brings texture to the experience.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
bite_root](http://www.tastetomorrow.com/bite_root)



FRESHNESS

Multi
Grain

Multigrain Bread

The fragrance, appearance and crunchiness of products create the experience of freshness for consumers and will enhance their perception of quality. This crunchy multigrain bread combines the benefits of wholegrain with natural freshness and superior taste. It will delight your customers' palates as it contains Softgrain: tender sprouts, wholegrains and seeds infused with sourdough.

DOWNLOAD
THE PDF AT

[www.tastetomorrow.com/
multigrain_bread](http://www.tastetomorrow.com/multigrain_bread)



INGREDIENTS

- 80% Strong flour
- 20% Spelt flour
- 60% Water +/-
- 2,2% Salt
- 35% *Softgrain Sprouted Rye**
- 2% *O-tentic Durum**
- 40% *O-tentic Poolish**
- Q.S. *Puravita Decor**

WORKING METHOD

Preparation

To make the poolish

- Mix 1 kg of flour and 1 liter of water at 15°C and add 20 g of O-tentic Durum.
- Leave for 15 hours at 5°C.
- Leave out for 1 hour in bakery before using.

Mixing spiral

8 minutes 1st speed, 5 minutes 2nd speed – add grains last 3 minutes.

Dough temperature

25-26°C.

Bulk fermentation

45 minutes, give one fold at 30 minutes.

Scale

1.500 g.

Intermediate proof

20 minutes.

Make up

Shape long with good pressure and then roll in water and then in seeds. Then place on well floured couche. Make sure to give good space between loaves as they can generate much heat and almost double in size.

Final fermentation

60 minutes at 28°C, 80% R.H. or overnight at 5°C on floured couche.

Decoration before baking

Cut in 3 times.

Oven temperature

250°C with steam.

Baking time

5 minutes, then drop oven temperature at 220°C and bake for 45 minutes to 1 hour.

Tips & tricks

Open your damper the last 10 minutes of baking.

This recipe was developed and created by Morgan Clementson, International Technical Advisor for Bakery.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.

INGREDIENTS

Olive dough

100% **Total flour weight**

100% Flour

70% Water

5% Olive powder

4% Olive oil

2% Salt

4% *O-tentic Mediterraneo**

Tomato dough

100% **Total flour weight**

100% Flour

50% Tomato juice

10% Water

4% Olive oil

10% Tomato paste

2% Salt

4% *O-tentic Mediterraneo**

Black garlic dough

100% **Total flour weight**

100% Flour

70% Water

5% Black garlic

4% Olive oil

2% Salt

4% *O-tentic Mediterraneo**

Dentelle

200ml Water

60g Oil

15g Flour

2g Algae powder (green)
or squid ink (black)

WORKING METHOD

Mixing spiral

4 minutes at first speed – 5 minutes at second speed.

Dough temperature

26°C.

Bulk fermentation

15 minutes at ambient temperature.

Scale

500g.

Intermediate proof

Laminate all doughs separately to 2 mm in a 60x40 rectangle shape and place on a tray in the following order olive, then tomato and then garlic. Once done, place in the freezer covered with plastic.

Make up

Roll out again to 2 mm then roll up and place for another 15 minutes in the freezer to make it easier for cutting. Once rolled up, cut 2 cm wide and place 4 pieces in each wooden bakeable box.

Final fermentation

60 minutes at 30°C, 80% humidity.

Decoration before baking

Sunset Glaze.

Oven temperature

220°C.

Baking time

20 minutes.

To make the dentelle

- Combine all ingredients and whisk until fully combined.
- Place in hot frying pan with oil and cook until all water evaporates.

*This recipe was developed and created by Morgan Clementson,
International Technical Advisor for Bakery.*

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.



Fusion Focaccia

Creating this dough requires quite some craftsmanship. Made with local ingredients, this fusion focaccia provides consumers an experience that is both visually appealing and tasty. It combines fermented black garlic and tomato coloured dough, and is topped off with a dentelle made of green algae or black squid ink.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
fusion_focaccia](http://www.tastetomorrow.com/fusion_focaccia)

INGREDIENTS (20 pieces)

Praliné rice crackers (gluten free)

- 200 g Rice chili crackers
- 15 g Roasted sesam
- 50 g **Pralirex hazelnut***
- 40 g **Belcolade Blanc Intense***

Coconut biscuit (gluten free)

- 68 g Rice flour
- 202 g Icing sugar
- 105 g Grated coconut
- 240 g Almond powder
- 100 g Granulated sugar
- 315 g Egg whites
- 6 g Orange zest

Vietnam 45% chocolate creamy

- 100 g Pure Coconut cream
- 68 g **Belcolade Origins Vietnam 45%***
- 5 g **Belcolade PPP cocoa butter***

Thai pineapple brunoise

- 150 g Fresh victoria pineapple (brunoise)
- 1 g Lime zest
- 2 g Fresh ginger (grated)
- 4 pcs Chopped fresh coriander leaves
- 80 g Mango puree
- 20 g Passion fruit juice
- 10 g Lime juice
- 10 g Sugar
- 1,5 g Pectin NH

Tofu lime mousse

- 300 g Fresh cream 35%
- 240 g Tofu natur
- 30 g Sweet soy sauce
- 4,5 g Lime zest
- 315 g **Belcolade Blanc Intense***
- 10,5 g Gelatin powder 180 bloom/silver
- 52,5 g Water
- 495 g Whipped cream 35%

WORKING METHOD

Praliné rice crackers (7g)

- Blend everything together in the food processor.
- Roll out between 2 paper sheets till 3 mm. Let it set.
- Cut rounds of 5 cm.

Coconut biscuit (1 tray 40x60 cm)

- Sift all powder, except the granulated sugar.
- Whip the egg white with granulated sugar until you get a firm texture.
- Fold in, powders and orange zests.
- Spread on baking tray 40x60 cm.
- Bake 10-12 minutes at 180°C, close damper.
- Cool down and cut round of 4,5 cm. Reserve it.

Vietnam 45% chocolate creamy (8g/insert)

- Warm the coconut cream to 60°C, pour on the chocolate and mix.
- Mold 8 g in flexipan half sphere Demarle ref/1489.
- Let it set in fridge, then add the pineapple brunoise on top.

Thai pineapple brunoise (10g/insert)

- Mix all together except sugar and pectin.
- Bring to a boil by adding the sugar/pectin mix at 60°C.
- Mold in flexipan half sphere Demarle ref/1489 on top of the Vietnam chocolate cream.
- Dispose a layer of biscuit then freeze.

Tofu lime mousse (55g/mold)

- Soak gelatin in water.
- Warm the fresh cream at 80°C, pour over tofu, lime zest and chocolate.
- Add melted gelatin and blend using hand mixer.
- At 27-28°C, add the whipped cream.

This recipe was developed and created by David Redon, previously International Technical Advisor for Patisserie at Puratos.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.



DIM's

Consumers analyse the ingredients used, the nutritional values, the presence of preservatives and additives, sourcing, as well as allergen information. This gluten free dessert, shaped as a dim sum is made with natural and sustainable ingredients. An explosion of textures and flavours with the freshness of a pineapple brunoise with lime, ginger and fresh coriander.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
dims](http://www.tastetomorrow.com/dims)

TRANSPARENCY



Smoked Grains Knot

Consumers are seeking more and more information about the products they consume, but we need to go beyond packaging to provide it. An edible QR code provides the story behind the bread's making, additional information linked to its 100% organic ingredients and nutritional values.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
smoked_grains_knot](http://www.tastetomorrow.com/smoked_grains_knot)

INGREDIENTS

- 100% **Total flour weight**
- 100% Organic flour
- 2% Organic salt
- 65% Water
- 2% Organic sugar
- 30% **Organic Sproutgrain Rye (delayed)***
- 4% **O-tentic Organic***

Grains

Infuse the grains using a smoker to give the grains a smokey note.

WORKING METHOD

Mixing spiral

- 5 minutes at slow speed.
- Approx. 6 minutes at fast speed.
- Then take out half the dough and add the grains to the other half and mix for another 2 minutes.

Dough temperature

27°C.

Bulk fermentation

20 minutes.

Scale

200g x 2 with grains,
200g x 1 white.

Intermediate proof

10 minutes.

Make up

- Make all pieces 40 cm long.
- Place 2 of the long grains on either side of the white on the table all in line.
- Then with your hand in the center create a knot and place QR code on the bread and place on a well floured couche.

Final fermentation

Best overnight at 8°C, covered. Take out and leave until ready to bake (approx. 60 minutes).

Decoration before baking

Dust with flour and stencil if you wish.

Oven temperature

250°C down to 220°C with steam.

Baking time

30 - 35 minutes.

Discover what lies behind the edible QR code



This recipe was developed and created by Morgan Clementson, International Technical Advisor for Bakery.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.

INGREDIENTS

Sugar reduced cake

500 g *Puratos Tegral Satin Cream Cake SR**

175 g Eggs

120 g Water

150 g Oil

50 g *Belcolade Selection Noir
Sugar Reduced Cacao-Trace**

Filling

Q.S. *PatisFrance Gianduja**

WORKING METHOD

Sugar reduced cake

- Chop the chocolate into small pieces to be incorporated into the cake batter.
- In a mixing bowl with a paddle attachment mix all the ingredients together.
- Pipe the tegral satin cream cake in between two tube lined with baking paper.
- Bake at 180°C for 15 to 18 minutes close damper.

Filling

- Cream the gianduja in a mixer with paddle to a pipeable texture.
- Pipe stripes of 40 cm long.
- Cut to the size of the tube.
- Add roasted hazelnuts and candied fruits.

Make up

On a cooling rack, pipe some sugar reduced chocolate in the center of the cake with a baking paper in the bottom and remove it right away to have chocolate coated in the center of the cake.

*This recipe was developed and created by Philippe Richard,
International Technical Advisor for Pâtisserie.*

Tube Cake

Today's consumers have little spare time, so convenience is important when it comes to food. It's about having what you want, whenever you want it, without compromising on the quality of the product. Consumers appreciate finished goods that could be consumed conveniently. This delicacy is bite-sized.

* This is a Puratos product.
For more information
check www.puratos.com or
contact your local Puratos
representative.



DOWNLOAD
THE PDF AT
[www.tastetomorrow.com/
tube_cake](http://www.tastetomorrow.com/tube_cake)

NEXT LEVEL
EXPERIENCE



Chocolate Easter Egg

Consumers want to be amazed and surprised with unexpected elements. While taste is of crucial importance, experience goes well beyond the food. The Taste Tomorrow consumer survey reveals that if taste is king, experience is queen. For this Easter Egg the surprise is on the inside.

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THE PDF AT
[www.tastetomorrow.com/
chocolate_easter_egg](http://www.tastetomorrow.com/chocolate_easter_egg)

INGREDIENTS

Dark chocolate nest

*Belcolade Selection Cacao-Trace 65**

Vanilla marshmallow

200 g Egg whites
400 g Caster sugar
100 g Water
160 g Glucose
140 g Invert sugar
50 g Gelatin sheet
2 pcs Vanilla pods

Chocolate eggs

*Belcolade Selection Cacao-Trace 65**

*PatisFrance Hazelnut Gianduja**

WORKING METHOD

Dark chocolate nest

- Temper the chocolate and create a cone using a small inflated balloon.

Vanilla marshmallow

- In a saucepan mix the caster sugar with the water and bring to a boil. Add the glucose and invert sugar and boil the mixture up to 118°C.
- Whisk the egg whites to form stiff peaks, pour the sugar syrup directly on them, and add the gelatin sheet (previously soaked and melted).
- Add the vanilla pods and scrape together until the mixture drops to 30°C.
- Place the mixture in the crystallised chocolate nests. Place a half-sphere of Belcolade Selection 65 dark chocolate directly in the centre, pressing until the marshmallow meets its edges.

Chocolate eggs

- Mould into the shape of eggs and garnish with PatisFrance Hazelnut Gianduja.
- Coat with sugar for the finishing touch.

This recipe was developed and created by Stéphane Leroux, Meilleur Ouvrier de France (MOF) and International Technical Advisor for Chocolate.

* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.

INGREDIENTS

Nuts Praliné

- 150 g Sugar
- 150 g Zusto (sugar replacer)
- 75 g Water
- 450 g *PatisFrance Hazelnut or Almonds**

Nuts Crispy Praliné

- 750 g Nuts Praliné (see above)
- 110 g *Belcolade Noir Selection Cacao-Trace**
- 90 g *Belcolade Lait Selection Cacao-Trace**
- 50 g *Belcolade Pure Prime Pressed Cocoa Butter**

Ganache Vietnam

- 360 g Cream (35%)
- 85 g Dextrose
- 40 g Glucose
- 80 g Sorbitol
- 370 g *Belcolade Origins Noir Vietnam 73 Cacao-Trace**
- 25 g *Belcolade Lait Selection Cacao-Trace**
- 40 g Butter

Infusion per kg of ganache

Herbs: See table on the right of this page

*Personalisation at your finger tips!
Create your own personal moodballs
thanks to the help
of our chatbot.
This service was
available at our
Taste Tomorrow
events.*



WORKING METHOD

Nuts Praliné

- Mix the sugar, the zusto and water in a pan and heat the whole to 118°C.
- Add the nuts and sand the whole.
- Bring back over the heat and caramelise the whole mixing continuously with a spatula.
- Leave to cool down on a silicone sheet.
- After cooling, grind with a robot cutter until a fine paste is formed without having to heat it too much.

Nuts Crispy Praliné

- Mix all the ingredients, temper at 26°C.
- Pipe into demi spheres that are pre-coated with Belcolade Noir Selection Cacao-Trace chocolate. Leave the praline to crystallise.

Ganache Vietnam

- Warm the cream, the dextrose, the glucose and the sorbitol to 85°C.
- Pour on the Belcolade Origins Noir Vietnam 73 chocolate. Mix until well blended and then add the butter when the ganache is around 33-35°C.
- Pipe the ganache into demi spheres that are coloured with natural colours and pre-coated with Belcolade Noir Selection Cacao-Trace chocolate.

*This recipe was developed and created by Michel Eyckerman,
International Technical Advisor for Chocolate.*

- Leave the ganache to crystallise for 12 hours in a room at 16 to 18°C and an average humidity rate below 60%.
- Glue the 2 different demi spheres moulds together with chocolate and leave to set. Demould.

Infusion

- Boil the cream from the recipe 'Ganache Vietnam' and add the dosage of herbs mentioned (use only one). Cover it with plastic and leave to rest for 15 minutes.
- Sieve out the herbs, rescale the liquid.
- Add some milk to obtain the same weight as in the beginning.
- Follow the process to make the ganache Vietnam using this infused cream in the recipe.

Yellow: *Fresh feeling*

Cinnamon Stick	12 g	Tarragon Fresh	22 g	Rosemary Fresh	16 g
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Green: *Healthful feeling*

Lavender Dried	4 g	Ginger Fresh	14 g	Basil Fresh	8 g
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Orange: *Wholesome feeling*

Mint Fresh	14 g	Thyme Fresh	14 g	Cloves Dried	10 g
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Red: *Vigorous feeling*

Bay leaves Dried	12 g	Oregano Fresh	15 g	Rosehip Dried	22 g
------------------	------	---------------	------	---------------	------

Blue: *Relaxed feeling*

Marjoram Fresh	13 g	Chamomille Dried	18 g	Mandarin Peel	20 g
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* This is a Puratos product. For more information check www.puratos.com or contact your local Puratos representative.



Moodballs

Consumers nowadays see food as an expression of themselves, so it should be adapted from person to person. The Moodballs allow you to combine flavours based on the mood you wish to experience combining ingredients that positively influence your well-being.

VIEW
THE VIDEO AT
[www.tastetomorrow.com/
moodballs_video](http://www.tastetomorrow.com/moodballs_video)

Trend 7

ULTIMATE
CONVENIENCE





Ultimate convenience is driven by smart tech

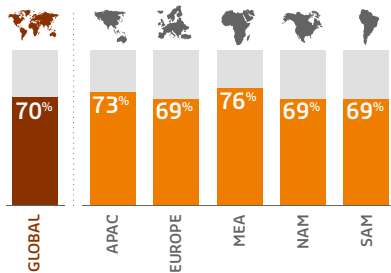
With so little time and such busy lives, today's consumers demand ultimate convenience. They want immediate access to everything they desire, without having to wait or compromise. Buying food online and other technological innovations can make things more convenient. Consumers are open to digital solutions when it improves their shopping experience.

KEY TREND INSIGHTS

Combining the best of the offline and online worlds

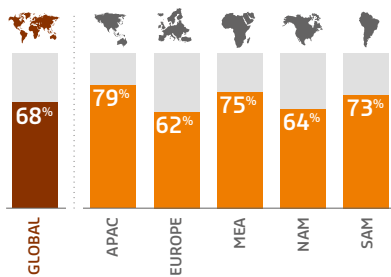
Ultimate convenience

Do you think food will be less, the same or more bought online in 2030?



% expect more

Online ordering and delivery will become easier in the future



% agree + totally agree

Today's consumers have little spare time, so convenience is important when it comes to food. It is about having what you want, whenever you want it, without compromising on the quality of the product. Until now, this trend was mainly about 'meal mobility', being able to buy meals to eat on the go, or prepared food to take home. Consumers appreciated finished goods that could be consumed conveniently. This is still the case today but it is no longer enough.

Combining the best of the offline and online worlds

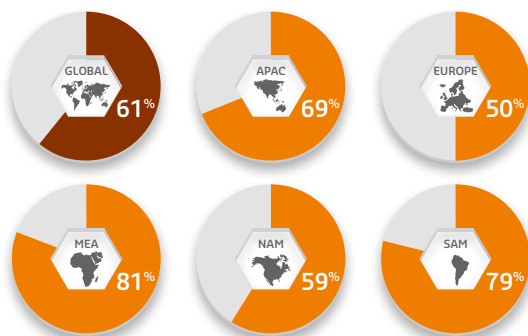
The survey reveals that the majority of consumers want to be able to buy fresh food 24/7. They demand more convenience and expect to buy more food online in the future. At the same time, consumers do not want high street shops to disappear. It is about combining the best of both worlds: the convenience of online purchasing and the real-life, full sensory experience of the physical store.

An open mind for digital innovation

But the digital revolution does not stop at online ordering. The survey shows people have high expectations of, and are very open to new digital technologies. Consumers are especially attracted to automatically scanned shopping trolleys and digital assistants. Opinions vary quite starkly between regions. Consumers in Asia-Pacific, South America and Middle East & Africa are most enthusiastic about digital innovation.

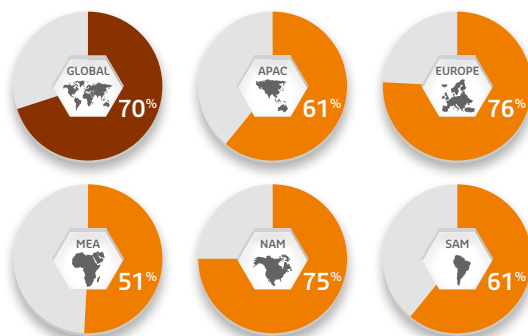
Food 24/7

I want to be able to buy fresh food 24/7



% agree + totally agree

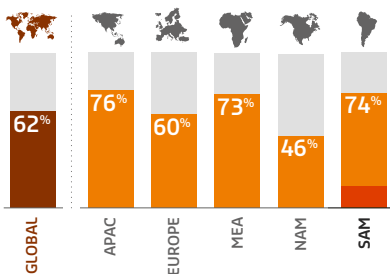
I would like to see the end of stores on the street in the future



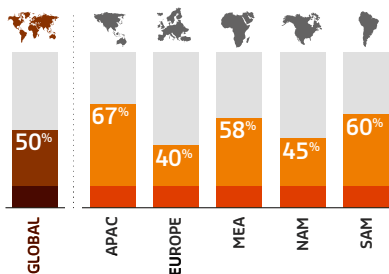
% agree + totally agree

An open mind towards digital innovation

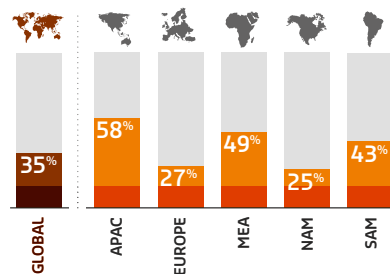
It would be great if my shopping trolley is scanned automatically as I shop



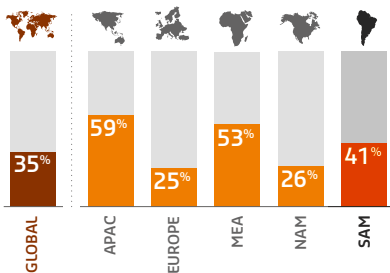
In the future, we will all have digital assistants, which we can use to place orders easily online with voice control



I would like food delivery to be automated with self-driving cars, drones, etc



I would like stores to be far more automated



% agree + totally agree

KEY TAKEAWAYS

DIGITAL SOLUTIONS ARE BECOMING ESSENTIAL IN OUR INDUSTRY

- ONLINE BUYING WILL CONTINUE TO INCREASE, BUT CONSUMERS DO NOT WANT SHOPS TO DISAPPEAR
- AUTOMATICALLY SCANNED SHOPPING TROLLEYS, DIGITAL ASSISTANTS AND AUTOMATED STORES ARE WELCOMED
- AUTOMATIC FOOD DELIVERY OFFERS CONVENIENCE



Digital solutions are becoming essential

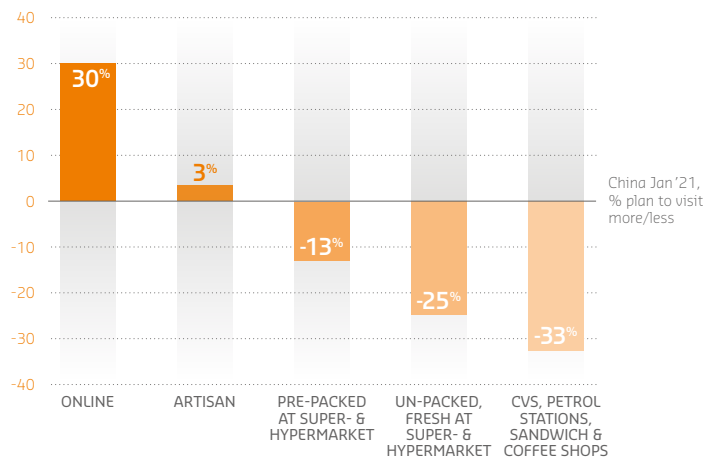
Many shops, restaurants and other food outlets had to shift their business model from dining in to other, often convenience-driven services without face-to-face contact with their customers.

Digital assistants, cashier-less stores, food delivery, curbside services, order-ahead options, drive-thru services, walk-up order windows, expanded delivery zones and hours... companies became really creative, and consumers appreciated it. A return to normal doesn't mean business as usual, as consumers want to keep these convenience-driven services.

Boost in online sales

The coronavirus crisis boosted online sales enormously. And convenient as they are, online sales are expected to continue growing in most countries. 35 to 75 percent (depending on country) agree all shops and restaurants should be able to deliver at home.

*Expected change in shopping frequency for Breads
Among Chinese consumers in January, Online shows
to have benefitted most from the crisis*





CONCEPT WATCH

Cool concepts that turn buying food into an ultimately convenient experience

Today's consumers are increasingly busy. With so much to do and so little time, convenience is of growing importance when it comes to buying food. The latest Taste Tomorrow survey revealed the Ultimate Convenience trend. Convenience can come in many forms. As the survey also revealed Health as one of the nine key trends, we zoom in on some concepts that make it ultimately convenient to buy healthy food.

I want it all, and I want it now

Until recently, the convenience trend was mainly about 'as easy and fast as possible'. Though this is still true, the latest Taste Tomorrow survey showed that there is more to convenience nowadays.

Convenience can come in many forms, such as:

- Speedy, quick preparation
- Always available (24/7)
- Meal mobility (on the go/take home options)
- Easy (online) ordering
- Home delivery

Consumers want to be able to buy fresh food 24/7

Obtaining food 'as easily and quickly as possible' used to lead to junk food alternatives. Not anymore. A growing number of concepts are on a mission to make it ultimately convenient to buy healthy food.



1 Warehouse

Healthy food concept Warehouse is located within an Antwerp-based gym. Both Warehouse and the gym have the same mission: creating an environment that inspires people to live healthily. Of course it is very convenient to get your seasonal and fresh dishes and healthy snacks at the same place as where you can work on your muscles and condition. The menu features dishes like quiche, avocado toast, healthy juices, homemade lemonades and vegan banana bread.



Belgium



sportclubheteiland.be/warehouse

2 Naturebox

Naturebox is an online subscription service for personalised healthy snacks. This food box caters to each consumer's taste and dietary preferences. Paleo-friendly, keto-friendly, vegan, sugar-free, gluten-free, low fat, it is all possible. Naturebox's goal is to promote wellness and reduce stress by providing tasty, healthier snacks, delivered in the most convenient way possible: at your home or office.



USA



naturebox.com

3 Health Food Wall

Health Food Wall makes it ultimately convenient to choose a healthy take-away meal instead of a standard fast food snack. The Health Food Wall is one of the fastest healthy meal solutions on the market today, making a healthy meal available in just a couple of seconds. All meals that are offered through the automat are vegetarian, vegan or gluten-friendly and are packed in biodegradable and FSC-certified materials.



the Netherlands



healthfoodwall.com

4 Paleo Power Meals

This US based concept fills refrigerators in gyms with healthy meals and snacks. Members of the gym can subscribe to PPM, order the meal they want and pick up their fresh and healthy meal right after their training, or they can have it shipped to their home. All meals and snacks are based on Paleo, the 'primeval diet' in which the recommended ingredients are mainly meat, fish, vegetables, fruit and nuts.



USA



paleopowermeals.com

5 Portions

Another automat-based concept is Portions, offering healthy salads packed in a jar. It is Portions' mission to make healthy meals easily accessible, including at locations where a healthy option is often hard to find, like hospitals and train stations. All of their recipes are curated by a dietician, and their ingredients are carefully selected to nourish the mind and body. No sugar and salt are added to the salads and dressings. The vending machines are made of recycled parts from old automats, and the plastic jars in which the salads are provided are also on their second life.



Canada



portions.ca


EXPERT VIEW

How the BreadBot caters to the need for ultimate convenience and freshness

Technological breakthroughs – like online grocery shopping – can speed up service and make life much more convenient. But at the same time, consumers long for freshness, and for the experience they find in (offline) shops. And that is where the BreadBot comes in.

BreadBot is the nickname of the Wilkinson Mini Bakery that was recently introduced onto the market. It is a fully automatic, stand-alone bread bakery in which the authentic feeling of bread is combined with a new technology. Randall Wilkinson, CEO of Wilkinson Baking, explains all about the BreadBot and how it meets many consumer needs.

“The Mini Bakery, the first of its kind, is pioneering a fully automated way to bake bread. It mixes, forms, proofs, bakes and cools bread all on its own. From autostart to notifying employees when bread needs to be sliced, the BreadBot is packed full of features and has the potential to revolutionise the bread industry as we know it. It is the first time that the bread-baking process has been fully automated from scratch to complete loaf. And as it is a transparent machine, the process is made completely visible.”



“Customers can watch how the bread starts from basic ingredients and ends up as a complete loaf.”



Founded for convenience reasons

The idea of a fully automatic bread bakery arose more than twenty years ago. The son of one of Wilkinson's acquaintances, who had a job at a bakery, had to start work at the crack of dawn to make sure the customers would have fresh bread for breakfast. "How could this be fully automated?", he implored one day. His father worked on the idea for years, ultimately asking the Wilkinson family to take over the project as his health was failing. Randall Wilkinson: "It turned out that this project needed a lot of off-the-shelf technology, like sensors for example. Back then, these tools were not available, so the project was put on hold for nearly a decade. Now these technologies do exist, we restarted the project, and the Mini Bakery was brought onto the market earlier this year."

Ultimate convenience versus freshness

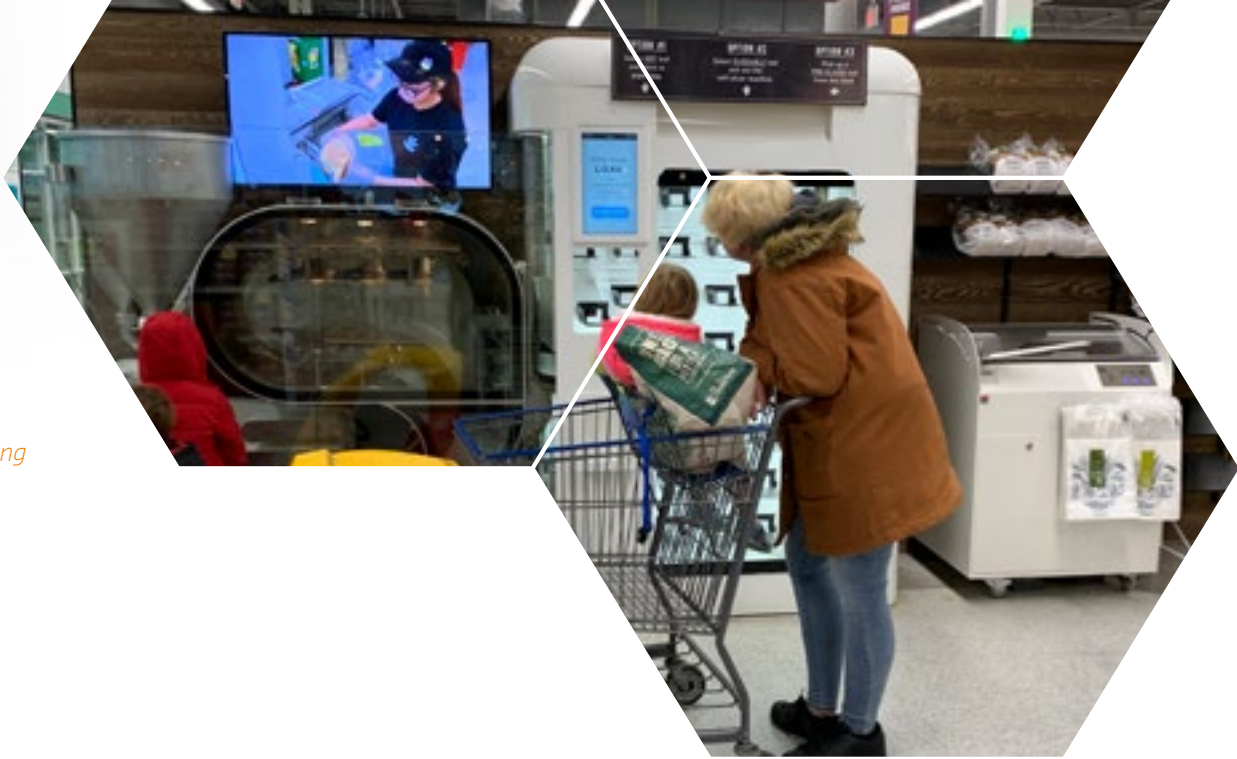
The Taste Tomorrow survey revealed nine global key trends. One of these is ultimate convenience: consumers want it all, and they want it now. But they also want freshness, and they want next level experiences. How does the BreadBot respond to these needs? Wilkinson: "What people are looking for is bread that is freshly baked. That is why stores are baking off frozen bread, so that the aroma of the baking fills the store. But the trade-off is that the freezing and time taken for the process, makes the bread more susceptible to going stale. If you want to buy bread at the end of the day, it already lacks a certain freshness."

The most obvious way to achieve ultimate freshness is to bake the bread yourself, but this is not always very convenient, considering the available skilled labour and costs. "The BreadBot takes this work off your hands; you get the complete experience of fresh bread, but without having to do the work. And it makes it possible for consumers to buy bread fresh from the oven at any time of the day, even in the late afternoon."

ULTIMATE CONVENIENCE

EXPERT VIEW:

Randall Wilkinson,
CEO of Wilkinson Baking



Fresh bread all day long

The Mini Bakery is a continuous chain that supplies the store and its customers with fresh bread at every moment of the day. "Each loaf takes 96 minutes to bake. Every 6 minutes a new loaf starts its journey, so that is 10 loaves per hour. Of course, that is not enough for a big retailer. But we do not expect the Mini Bakery to ever take over the full production. There will always be a demand for artisan loaves and other bread types like French baguettes and round loaves, as well as Danish pastries and the like. The Mini Bakery only produces pan loaves at this point. This is the most sold bread in the US, but we expect pan loaves to become more dominant in other countries as well. There is a supermarket chain in France that wants to test it in 2020. They have no tradition of pan loaves, but can sense an opportunity. They expect the freshness will win a lot of customers, and it also brings them convenience as a retailer."

Unique asset for stores

There is a lot of interest, and companies that have already tested the BreadBot are positive. "We delivered the early units to the US Navy, and they are now evaluating them for on-ship uses. We are also currently testing with Stop & Shop, a part of Ahold Delhaize with 450 stores, and with other stores as well. As the results have been positive so far, we are now putting our efforts into scaling up production."

When asked why retailers are so positive about the BreadBot, Wilkinson is quite clear: "The Mini Bakery provides the experience of fresh bread and diffuses a lovely baking aroma. Customers smell the bread, and can watch it start as flour and end up as a complete loaf. They appreciate the experience and the transparency of the process. Consumers want freshness, and a pan loaf does not get any fresher than this, as they can pick it up one hour after it is

baked! They can also see that the bread does not need preservatives. They trust the bread to be healthy and clean label, because they have seen it being produced from just flour. And additionally, they can see that the bread does not need trucks for transport to stores; dry ingredients are the only items shipped. Combined with the minimisation of waste – the number of loaves baked can be tailored to daily demand – makes this a planet-proof way of producing bread.”

Convenience for both consumers and retailers

Producing bread locally at every time of the day is not only very convenient for consumers, but is a welcome development for retailers as well. Until now, doing so has been a challenge, as many stores are short on labour. But if a robot is doing the job, that is no longer an issue. What is more, the BreadBot can be tailored to fluctuating demands at different times of the day. If you have very few bread-buying customers between 2 and 3 pm, for example, you can schedule the BreadBot to make only 3 loaves in that hour. It is also possible to adapt the flour. Stores can make a schedule: pick up fresh wholegrain bread between 8 and 10 am, rye bread between 10 am and 12, spelt bread between 12 and 2 pm, etc.

Adapting to the changing needs of consumers

Wilkinson believes that the need for convenience and the need for goods to be adapted to personal requirements will keep growing in the coming years. “In the age of industrialisation, production got centralised in big factories as much as possible. Nowadays, things are moving back out, getting decentralised, happening closer to the consumer and getting increasingly customised. It is now about producing what the customer wants to buy, rather than what the producer wants to sell. This move to the edge is inevitable if you want to create ultimate convenience. And the BreadBot is part of this move to the edge.”

Ultimate convenience with the BreadBot

As the BreadBot makes it possible to get fresh bread at any time of the day, it already delivers a lot of convenience. Wilkinson expects this to increase in the future. “Low-salt, low-sugar, all sorts of bread will become available. With the next-generation BreadBots, I expect it to be possible to order customised bread via your smartphone: ‘1 wholegrain loaf with cranberries, and 1 multigrain loaf with walnuts, both sliced please, and I want to pick them up at 4 pm’. So BreadBot becomes an opportunity for retailers to provide more customised bread with ultimate freshness, which customers can pick up at the time that suits them best.”



*“A pan loaf
does not get any
fresher than this,
as consumers can pick
it up one hour after
it is baked!”*

NEXT LEVEL EXPERIENCE



The background is a warm, orange-toned image of a donut. In the upper left, there is a white thumbs-up icon. The image is decorated with white hexagonal patterns: a cluster of small hexagons in the top right and larger, semi-transparent hexagons at the bottom. Faint, stylized donut icons are also visible in the background.

If taste is king, experience is queen

Consumers want to be amazed and surprised by unexpected elements. While flavour is crucial, experience goes well beyond the food itself. Atmosphere, innovation, service with a smile and presentation matter more than ever.

KEY TREND INSIGHTS

Consumers want to be amazed and surprised with unexpected elements

The Taste Tomorrow survey reveals that enjoying food is about more than just eating. It also includes the entire experience surrounding the food. This trend actually counterbalances developments towards more digital channels. Consumers expect more online solutions, but they also want to have great new experiences in physical outlets and they want to be amazed and surprised.

Elements that contribute to an unforgettable food experience

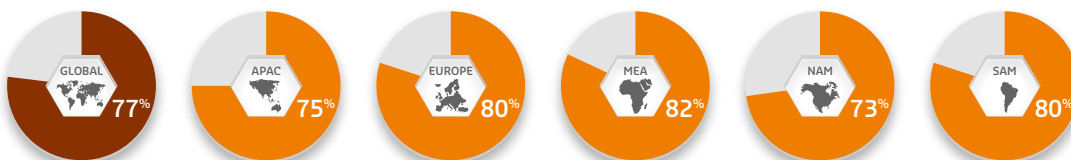
Taste plays a crucial role in the total food experience, so it is crucial to never compromise on taste. But which other elements contribute to an unforgettable experience? The survey showed that experience is not a one-dimensional aspect. It turns out that there are multiple factors that impact the total experience, and each element is essential. Different elements are more prominent in different regions.

Technology provides new experiences

One of the ways to provide surprising new experiences, is by using technology. Using virtual reality or 3D printing can certainly add to the experience. 77% of consumers worldwide would like to visit a shop or restaurant that uses virtual reality to improve the eating experience. And even more consumers are willing to try a 3D printed cookie, bread or piece of chocolate.

The experience around food

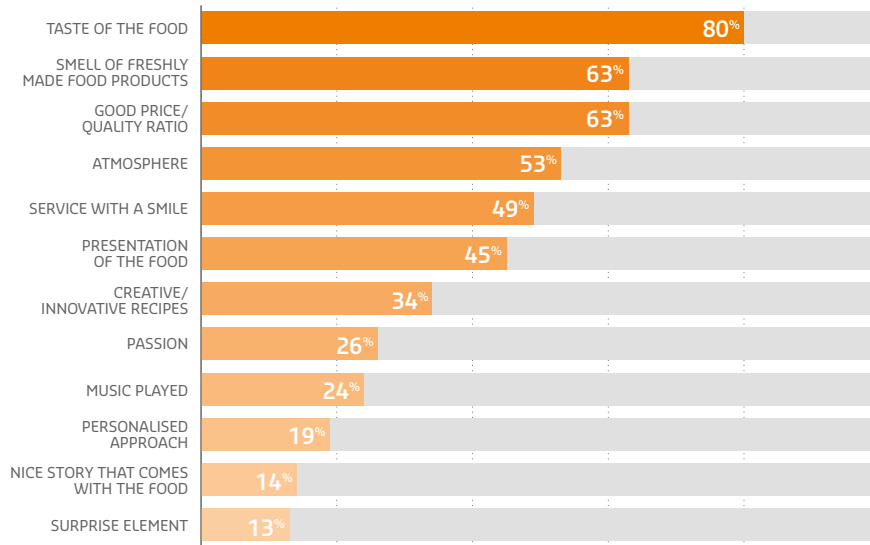
Enjoying food is about more than just eating it; it is the whole experience surrounding it



% agree + totally agree

An unforgettable experience

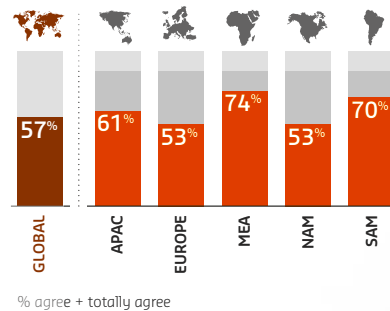
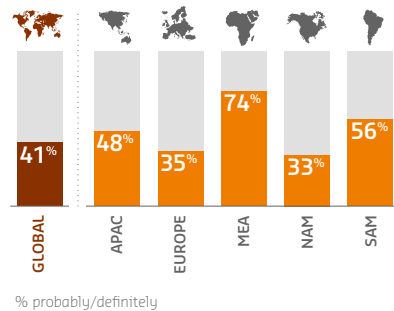
Which elements make up a nice food experience?



Technology provides new experiences

I would like to visit a restaurant or location that uses virtual reality to improve the eating experience

I would be willing to try a 3D printed cookie/chocolate/bread/etc.



KEY TAKEAWAYS

IF TASTE IS KING, EXPERIENCE IS QUEEN

- TECHNOLOGY PROVIDES NEW CONSUMPTION AND SHOPPING EXPERIENCES
- ATMOSPHERE, INNOVATION, SERVICE WITH A SMILE AND PRESENTATION MATTER
- 3D PRINTING CAN AMAZE AND SURPRISE



New hygiene protocols impact consumers' experiences

Before the coronavirus crisis, creating next-level experiences was about finding the right balance between technology and the 'human touch'. But due to COVID-19, it's more about balancing experience with hygiene protocols and packaging. That is a huge challenge, with on-site consumption forbidden or strongly restricted.

Service add-ons for extra safety and individualised experiences

In order to provide their customers with extra service or experiences, companies provide service add-ons for cleanliness, hygiene or individualised experiences. In London, you can dine in your own igloo, and in Amsterdam was experimented with glasshouses to offer safe and privileged dining experiences. In China, food delivery shows the real time body temperature of the delivery man.





Eating out - in

The impossibility of eating out, made consumers rediscover the joys of home-cooking and dining-in. And even after the lockdowns, social distancing and economic uncertainty will drive reluctance for dining-out. This brings opportunities for frozen food convenience, meal kit offerings and recipe inspirations. Young foodies are interested in edible entertainment, like virtual baking classes and tutorials, tasting menus, virtual bartending classes and restaurant or bakery cookbooks.



CONCEPT WATCH

Cool concepts that use technology to provide a next level experience



Consumers are hungry for new experiences. They want to discover new things and like to be amazed and surprised. The Taste Tomorrow survey revealed that 77% of worldwide consumers is looking for a 'Next level experience'. Of course, there are many ways to provide this. These two concepts provide a next level experience by using technology in a very special way.



1 Project Nourished

Tasting is more than just a stimulation of your tongue; all your senses are addressed. Virtual reality makes it possible to address the senses in a controlled way. Project Nourished by Kokiri Labs enhances eating by altering motion, shape, colour and scent in real time. This lets you pass through the full sensory experience of eating, without eating the actual food. It is done by combining different technologies, like a virtual reality headset, motion sensors and aromatic diffusers. Why? It allows people with food-related allergies and intolerances to enjoy the food they love.



USA



projectnourished.com

2 Dinner in Motion

Digital dining meets haute cuisine in this 360-degree restaurant. At Dinner in Motion, you dine with a large group of people at one big table. On and around the table, spectacular images are projected, immersing you in a fantasy world. Together with the food and drinks, which are made to complement the scenes on display, this delivers a real next level experience. For corporate meetings or special events, it is possible to supply the restaurant with your own images, which will then be used in a personalised introduction scene.



the Netherlands



dinnerinmotion.nl

EXPERT VIEW

Bringing a next level experience during & after work hours

BEEPLUS is a high-end space operator, established in 2015 in China. The company offers her business clients a unique proposition. BEEPLUS believes that through redesigning and re-building physical spaces, they can bring people totally new experiences. Derek Leng, Vice President at BEEPLUS: "We want to change the way we look at work and leisure."

Derek Leng is the company's Vice President and in charge of marketing, public relations, community and customer service. He explains what the BEEPLUS concept is all about. "BEEPLUS is a high-end space operator. Currently we offer three major space concepts: *Co-working Space*, *Enterprise Customisation Working Space* and our all-new *Lifestyle Space*. Our co-working business clients include big international brands like Airbnb, Softbank, Decawave and Coupang, as well as hundreds of start-ups and medium-sized companies. In just a few years BEEPLUS has become a well known high-end co-working brand in the Chinese market."

A BEEPLUS Lifestyle

"At the beginning of 2019, we introduced a new business unit: BEEPLUS Lifestyle. That included opening Asia's biggest bakery store, the BEEPLUS Super Bakery." BEEPLUS believes that through physical space redesign and re-built, they can bring people totally new experiences. To them the physical space is not only referring to working space, but also social space. Currently the BEEPLUS space concepts can serve people during two-thirds of their time every day: eight hours at work plus eight hours of social life. "In the future, we hope to serve people 24 hours a day via different BEEPLUS space concepts, including living space. We offer consumers experiences they cannot have anywhere else: well designed spaces, attractive products, first class services, cool and fun community events and the BEEPLUS Super Membership that connects all these things together."





BEEPLUS Super Bakery

BEEPLUS Super Bakery is a concept under the BEEPLUS Lifestyle business unit. The first one opened in Shenzhen. It measures about 3,000 square meters, covers two floors and has eight different in-store areas, e.g. a Bread Gallery, Cake, Coffee & Tea, Ice Cream & Chocolate, Juice, Brunch, Bar, and so on. "Since its opening, BEEPLUS Super Bakery has become very popular, especially among young people, and has been ranked No.1 Bakery Store in the city for several consecutive months. In the future, we plan to open more BEEPLUS Super Bakery stores and BEEPLUS Lifestyle spaces in China and even markets overseas."

Subvert the industry

BEEPLUS states that it wants to break through imaginary boundaries and subvert the retail industry. "We believe there are always opportunities to change, to innovate, to redefine, and to do things better, so that people can have new experiences. Even in well established industries and categories. The bakery category in the Chinese market is very traditional. In the past, bakery stores would be about 100-300 square meters, the bakery products are all very similar and the business model has not changed for quite a long time. The only big thing that changed is that people can easily order online nowadays. So we thought that, if we could build a bakery store ten times the size of an ordinary store and bring the most high-end bakery equipment in the world, offering hundreds even thousands of products of which 80% originally developed in BEEPLUS Super Bakery, we probably would be bringing people some brand new experiences."

"In the future, we hope to serve people 24 hours a day via different BEEPLUS space concepts, for work, leisure and living."



EXPERT VIEW:
Derek Leng,
Vice President of BEEPLUS

“Even in well established industries and categories, there are always opportunities to change, to innovate, to redefine, and to do things better.”

Trend: Next level experience

The Taste Tomorrow consumer survey reveals that consumers want to be amazed and surprised with unexpected elements. While taste is of crucial importance, experience goes well beyond the food. Derek: “I could not agree more. Taste is important, but today’s consumer expectations stretch beyond that and are higher than ever before. Compare it to when you travel. Your accommodation does not refer to a place just to sleep, it is the total sum of all the experiences that happen during your stay that also matter. It is the exact reason why we built BEEPLUS Super Bakery as a part of our Lifestyle space concept.”

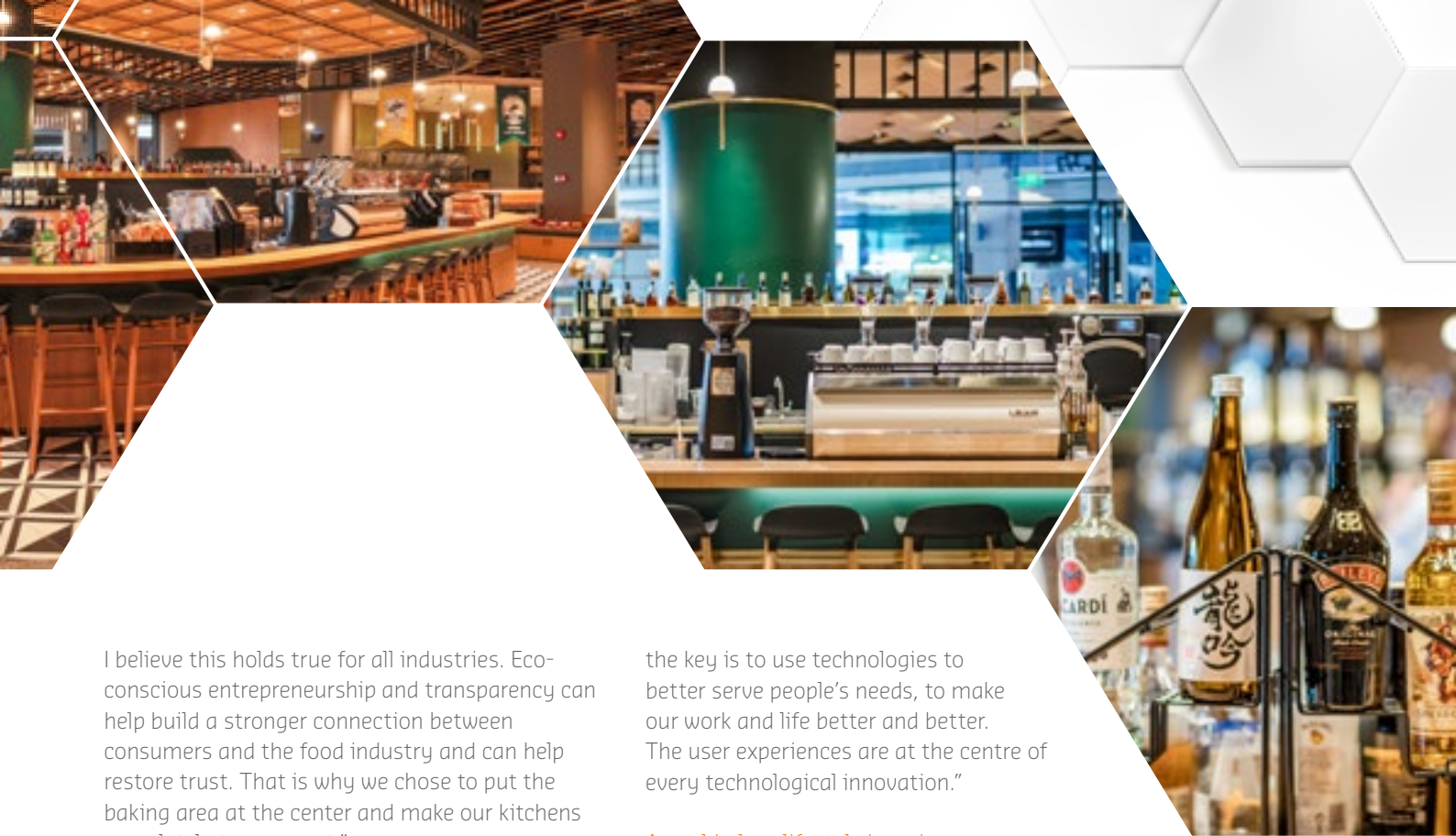
“Consumer expectations evolve, so we also need to evolve. Simply following consumer trends is not enough, sometimes we need to lead the change. It is our duty to bring consumers an unforgettable food experience. In 2019, more than two million people have visited BEEPLUS Super Bakery. It has already become a landmark space in Shenzhen, so we really need to challenge ourselves all the time. It is what people expect from us. Productwise, each

month we introduce dozens of new products to our consumers, some of which are linked to seasonal holidays, e.g Christmas or Chinese New Year. Businesswise, we keep stretching and developing our service levels. At the very beginning we opened from 11 am - 11 pm. In the second half of 2019, we expanded our opening hours, to include a breakfast offering for our consumers. And this year, we plan to switch the first floor to a bar at nighttime and further expand our opening hours. Ultimately, our ambition with BEEPLUS Super Bakery is that it will open 24/7.”

A next level bakery

“Unlike many traditional bakery stores, we have put the baking area at the center of our space. Our kitchens are completely transparent to consumers, our equipment is world class and our quality ingredients are sourced all over the world. Consumers cannot only enjoy delicious food, but also witness how their food is produced, and even participate in the process.” Building and maintaining trust has always been critical and a key challenge for the foodservice industry. “In fact,





I believe this holds true for all industries. Eco-conscious entrepreneurship and transparency can help build a stronger connection between consumers and the food industry and can help restore trust. That is why we chose to put the baking area at the center and make our kitchens completely transparent."

Technology to enhance experiences

The Taste Tomorrow survey shows that consumers welcome technologies in their food experiences, like 3D printing and Virtual Reality. "In BEEPLUS Super Bakery, we have detectors on the first and second floor to count how many consumers are walking into our space. If you speak German, you can voice-control the *Wachtel* baking ovens. You can also accurately control the temperature and pressure to make a perfect cup of tea or coffee with our Steampunk machines. We also introduced robots to serve our consumers from time to time. Technology will impact and change people's work and life in almost every aspect, no matter you like it or not. Technologies are not the enemies of traditions, it depends on how we use them. I think

the key is to use technologies to better serve people's needs, to make our work and life better and better. The user experiences are at the centre of every technological innovation."

A world-class lifestyle brand

"There is an old saying in Chinese that paradigms change over time, and so must you. Sometimes we embrace changes, or we lead changes, but never try to stop changes." BEEPLUS' vision is to change time consumed and quality through space design, buildings and operational excellence. Currently BEEPLUS Lifestyle only counts for about 10% of the total company business. In the future, we hope to design and build more amazing and breakthrough space concepts to better serve people's work and life, and eventually become a world-class lifestyle brand."

HYPER PERSONAL



The background image shows a digital display interface for a food customization station. At the top, it says 'Step 3 of 3' in yellow and 'MyFinishingTouch' in white. Below this, there are two white bowls containing different toppings. The first bowl is labeled 'onion' and the second is labeled 'walnut'. A third option, 'none', is also visible. The display is set against a background of white hexagonal patterns.

Step 3 of 3 MyFinishingTouch

Personalisation to the max

Food is becoming more and more personal. Consumers view food as a way to express themselves and they really appreciate custom-made bread, patisserie and chocolate. The Taste Tomorrow survey shows that consumers are very curious about food adapted to their own nutritional needs.

KEY TREND INSIGHTS

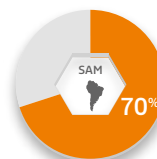
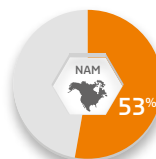
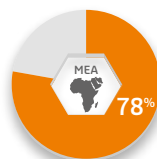
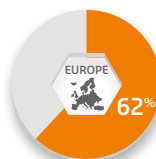
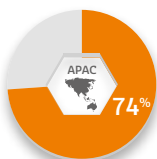
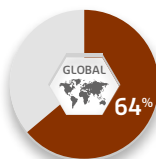
Personalisation is becoming more advanced

Personalisation is something we are already familiar with in the shape of things like personalised birthday cakes. But it goes way beyond this. We believe we are only at the very beginning of this trend. The latest survey reveals that consumers are very curious about food adapted to their own nutritional needs.

Personal does it



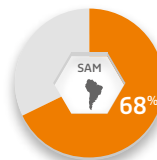
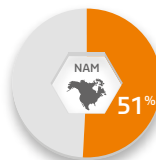
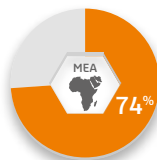
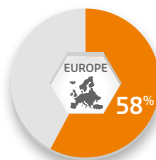
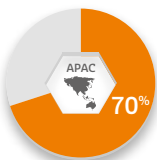
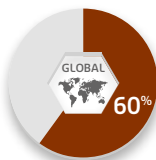
I would appreciate bread adapted to my personal nutritional needs



% agree + totally agree



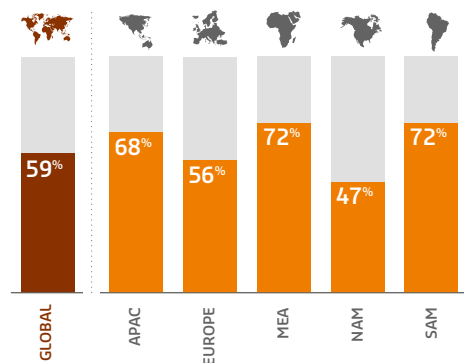
I would appreciate cakes & fine patisserie adapted to my personal nutritional needs



% agree + totally agree

Consumers love personalised food and services

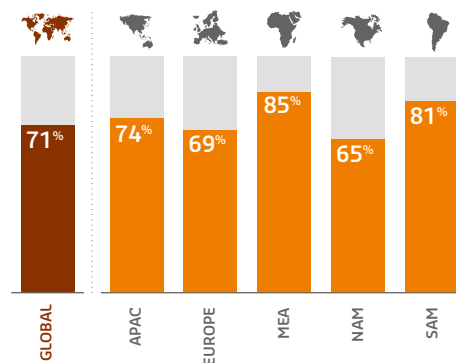
I would buy more in a store that knows me and adapts its offer to my personal dietary needs



% agree + totally agree

DNA-based diets are welcomed

Would you adapt your food consumption if you knew what your optimal diet based on your DNA is?



% definitely/probably

Consumers love personalised food and services

Personalisation started out as a few basic adaptations but has advanced to include things like enabling consumers to select ingredients, or 3D finishing touches. But this is just the beginning. Today, more and more consumers are already tracking their activities with wearables. Based on how many calories they have burned or the goals they set, diet recommendations can be provided. The survey shows that many consumers are open to this.

DNA-based diets are welcomed

The next step will be more advanced recommendations based on consumers' DNA or gut health. We asked consumers all over the world: "Would you adapt your food consumption if you knew what your optimal diet was, based on your DNA?" The majority answered in the affirmative. Consumers are clearly interested in taking personalisation to new heights.



COVID-19 IMPACT

Based on our global research, the hyper personal trend will not be impacted by the coronavirus outbreak.

KEY TAKEAWAYS

FOOD IS GETTING PERSONAL

- CUSTOM-MADE BREAD, PATISSERIE AND CHOCOLATE ARE HIGHLY APPRECIATED
- CONSUMERS ARE WILLING TO ADAPT THEIR FOOD CONSUMPTION BASED ON THEIR DNA

CONCEPT WATCH

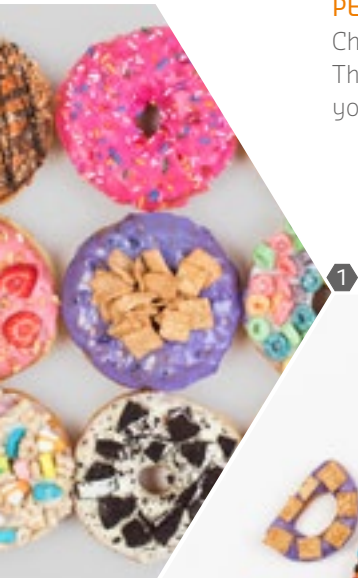
Cool concepts that illustrate the evolution of personalisation

The past few years, personalised food has become quite common. The Taste Tomorrow survey reveals that we are only at the beginning of this trend. These concepts illustrate the evolution of hyper personal food.

Every person in the world is unique and has its own personal preferences. That is why personalisation is trending and continuously evolving. Consumers want everything they buy to reflect their personal taste. Their clothes, shoes, coffee... as well as their baked goods. Custom-made bread, patisserie and chocolate are highly appreciated and will become even more important in the future.

PERSONAL

Choose your own decoration, shape, filling or topping. These concepts make it possible to adapt the looks of your product exactly to your customers' wishes:



1



1 Create your own donut

The California Donuts shop sells custom-made donuts in every shape and with any glaze or topping you wish. Think of huge donuts as a birthday cake, letter-shaped donuts or donuts in the shape of a panda or unicorn.



USA



cadonuts.com

2 Create your own M&M's

M&M's has an online configurator, making it possible to personalise both your M&M's and the packaging. Choose your own colour, add clipart or upload your own image, and add text exactly to your wishes.



worldwide



mms.com

3 Create your own chocolate bar

At the Ritter flagship store in Berlin, you can create your own Ritter Sport bar by choosing your favourite kind of chocolate and toppings. You can pick it up within 30 minutes.



Germany



ritter-sport.de

MORE PERSONAL

The latest survey reveals that consumers are open for further developments, and are very curious about food adapted to their own nutritional needs:

4 Chocolate with vitamins and supplements

Good Day Chocolate acknowledges there are all kinds of challenges that we all deal with in daily life. Whether you are tired, anxious, restless or just plain craving chocolate – the candy-coated chocolate supplements of Good Day Chocolate are there for you. Each product is made with fair trade dark or milk chocolate, and packed with premium supplements that transform you into your preferred mood – full of energy, calm, or sleepy. It is real mood food. Good Day Chocolate chose chocolate as the ‘carrier’ for their supplements because it offers an effective delivery format (also for children), and it is a whole food with natural, healthy benefits.



USA



gooddaychocolate.com

5 Chocolate for pregnant women

Together with a hospital and a chocolatier, Dutch concept Chocobombes has created a healthy way to eat chocolate during pregnancy. A pregnancy is divided into three trimesters, each featuring specific developments. Chocobombes developed bonbons specifically for every trimester, filled with nutrients supporting the relevant phase. By acknowledging that nutritional needs vary in the different stages of pregnancy, Chocobombes is well on its way to tailoring food to every individual.



the Netherlands



chocobombes.nl



HYPER
PERSONAL

HYPER PERSONAL

The next step will be more advanced recommendations based on consumers' DNA or gut health. The Taste Tomorrow survey showed clearly that consumers are interested in taking personalisation to new heights. When asked "Would you adapt your food consumption if you knew what your optimal diet based on your DNA is?", the majority answered positively. These concepts have already reached this stage of hyper personalisation:

7



6 Nutrition based on your biomarkers

Habit is a personalised nutrition company that is making optimal nutrition possible. Unlike one-size-fits-all diets, Habit uses an at-home test to uncover details about genetics, lifestyle, metabolism and goals to design personalised eating recommendations. How does it work? You answer some questions concerning your cholesterol levels, activity level and wellness goals to understand what your body needs. And then, based on your biomarkers, you learn how your body handles carbs, fat, protein and more. This shows you where you have opportunities to optimise your health with nutrition. After that, you get your nutrition plan, including your ideal plate, daily food guide, top-ranked foods in each food group, and personalised recipes.

 USA

 habit.com

7 Vitamins tailored to your DNA

Rootine claims that when you take 20 different vitamins and minerals, one will be harmful, two will have no effect and the rest will be incorrectly dosed. Mass vitamins are designed for everyone, but they fit no one. That is why Rootine brings you vitamins tailored to your DNA, nutrient levels and lifestyle. This comprehensive vitamin program actually analyses your unique DNA variations, lifestyle factors, and blood nutrient levels to custom-build your truly personalised vitamin formula. They do this by taking a profile and lifestyle assessment and a DNA cheek-swab test. Hyper personal indeed!

 USA

 rootinevitamins.com

EXPERT VIEW

How do we empower consumers to make better choices about their personal health?

The Taste Tomorrow survey demonstrates that consumers are interested in nutrition adapted to their personal needs. Nard Clabbers, previously Business Developer at TNO, a Dutch independent institute for applied scientific research, is an expert on personalised nutrition. He talks about the latest developments in this fledgling field.

According to Clabbers, personalised nutrition is about empowering people to improve their health by providing advice that allows them to adopt a healthier diet. Personalised nutrition involves the use of individual measurements – such as blood values, metabolism, cholesterol and fitness – as well as insights into lifestyle and personality. Providing a clear picture of an individual's health status, this creates an informed foundation for offering the right health-promoting products or services. This may involve tailored dietary advice, specifically designed foods, such as a 3D printed meal or a supplement tailored to the individual's mineral balance. Or the results may be used to compose a detailed shopping list, thereby helping the client navigate the huge supermarket offering to make the right – healthy – choice. Clabbers: "I consider personalised nutrition a form of empowerment: it helps consumers improve their diet by making the right decisions."

Lifestyle trumps DNA

People used to think that personalised nutrition requires DNA analysis and that the ideal diet can be formulated by looking at a person's genetic profile. According to Clabbers, this is an out-dated assumption. "Imagine I have got a twin brother who leads a very different life. For example, he does no exercise at all, outweighs me by 50 kilograms and is a lot more stressed than I am. It would not make sense to give us both the same nutritional advice even though we have the exact same genes. Genes are relevant, certainly, but they are not the only factor involved." This is why an understanding of someone's lifestyle is much more important for targeted dietary advice.

No annoying coach

"Personalised nutrition is often directly associated with food products. I consider it more of a service that helps inform your dietary choices. Personalised nutrition is not an app or an annoying coach constantly looking over your shoulder, telling you what you *must* and *should not* eat. There is no electric collar that is activated as soon as you drop some chocolate into your shopping basket. Draconian measures do not work at all when you want to nudge people in the right direction." According to Clabbers, personalised nutrition only works when the advice is aligned with someone's intrinsic motivation. That is the only way to achieve true behavioural change.



Nard Clabbers was trained as a nutritional expert and has worked in the food industry for many years. He joined TNO in 2011 as a personalised nutrition expert. In 2015, he spearheaded a large international pre-competitive research consortium in Personalised Nutrition & Health.

EXPERT VIEW: Nard Clabbers, Chief Science Officer at Foodned.com, previously Business Developer at TNO

"We all get the munchies at times. For some, that means eating a bar of chocolate or a bag of crisps, others will clear an entire bucket of ice cream or order a pizza. Personalised nutrition also involves looking at how we can fit these less-than-healthy episodes into a healthy diet. Consumers know that indulging in snacks is not good for them. There is no need for anyone to tell them. But it is interesting to be aware of better alternatives should you decide to give into the craving. Or how to compensate for the occasional sinning, at least in part." It all revolves around enriching the knowledge of the consumer, allowing them to make conscious choices. "Knowing what the healthiest option is at all times, is key. Whether we always end up going for it or not."

A healthier society

Clabbers and his colleagues hope their research will contribute to a society where people are not just *able* to make the right – healthier – choices, but actually *want to*. A society where everyone has easy access to healthy products but also where each consumer knows exactly what healthy products best to eat at that specific moment in time. This depends on the context. "Telling someone who lives in an American 'food desert' to eat more fresh vegetables or someone who comes home late at night every day to prepare themselves a stew more often, is pointless. Part of our journey is to find ways of better informing people about what it is they need; the other part is to seek innovations that make healthy nutrition easily accessible to all."

A need for cognition

One of the most eye-catching results of the study into personalised nutrition conducted by TNO and Wageningen Research, is the importance of psychosocial factors in personalised nutritional advice. "Personalised nutrition began from a more technological gadget perspective", Clabbers explains. "But it turns out that getting to know your consumer is key. We need to learn how to approach personalisation at multiple levels: biochemical as well as psychosocial. An example: imagine two people with the exact same physiological need of increasing their B2 vitamin intake. They may have vastly different ways of achieving behavioural change. Perhaps one of them has a greater need for an explanation of why it is good to eat more whole wheat bread, while the other person would be perfectly satisfied with being told 'eat this and you will be fine'. These are substantial differences: in terms of what motivates them but also how they want to be informed. Little differentiation is being applied in this area at the moment, even though it remains an important aspect of personalisation."



A demand-driven business model

Clabbers continues: “It is striking how little personalised nutrition seems to be catching on among major food companies. The current business model of a lot of these food producers is diametrically opposed to personalised nutrition. In order to make the step towards personalised nutrition, food producers need a demand-driven business model. Which is difficult when the focus has always been on producing as much food as possible at low cost.”

“We expect today’s dominant decision-making factors – price, flavour and convenience – to remain important to consumers in the future. But the importance of sustainability and health is expected to increase. Sustainability will eventually even grow into a hygiene requirement. Just like you cannot buy something today that is not food-safe, you will not be able to market something that has not been produced sustainably in the future.” However, health effects remain a personal factor. That is where Clabbers sees opportunities for personalised nutrition: “the ability to measure your own health and the effect of food on your body will become extremely relevant because of the direct personal benefits you stand to gain.”

Retailers set the trend

Clabbers expects retail to be the first place where personalised nutrition will be applied on a large scale. This makes sense because that is where consumers are constantly facing ‘what is healthy for me’ decisions. “I believe that over the next five years, changes will outpace those of the past five years. We are already seeing an increase in requests from companies focusing on personalised nutrition. Larger retailers and food service companies, such as caterers and restaurants, are developing related activities as we speak.”

When consumers consider *true value* – what is *truly* important to me – nothing beats health. This provides supermarkets with the opportunity to create added value for their customers. “The benefit is that they no longer need to compete on the basis of flavour, convenience or price. Supermarkets consider health as a way of distinguishing themselves. Examples can be found in many countries. In the Netherlands, supermarket chain Jumbo developed the Foodcoach app, which they use to provide athletes with nutritional advice based on their individual performance and training schedule. Market leader Albert Heijn recently acquired the FoodFirst Network; a platform that gives personalised food advice to consumers with an explicit focus on those with specific challenges such as diabetes, high blood pressure or food allergies. In England, a lot of experiments are being conducted with in-store health tests and in the USA, today’s supermarkets are fitted with health centres allowing consumers to use personalised nutritional advice for their shopping list right away. A clear business case emerges for tomorrow’s retailer: creating a competitive edge by adding value for their customers while contributing to a healthier society. A win-win situation.”

“We need to learn how to approach personalisation at multiple levels: biochemical as well as psychosocial.”



Consumer insights, fuel for innovation

3

We strongly believe that sharing consumer insights with our customers can help them differentiate, boost their business and contribute to even better finished goods on the market.

Since 2011, these in-depth insights into global and local consumer behaviours, attitudes and choices have also contributed to fueling the inspiration and innovation of our own teams.

Our Technical Advisors continuously interpret the uncovered trends into recipes, concepts and finished goods while our Research & Development department translates the insights into new products and innovative solutions.

Here are three practical examples – one for each of our product categories: Bakery, Patisserie and Chocolate, of new innovations at Puratos, that answer to the latest Taste Tomorrow trends.

2



Enzyme innovation Inspired by nature

Today's consumers demand quality bread that delivers on taste, healthiness and freshness. Analysis of the latest trends shows that transparency in food is high on the consumers' agenda, meaning that they are increasingly requesting clean(er) and more natural food. Bakers, on the other hand, require optimal quality, combined with ease of preparation and optimised cost processes.

Our journey to enzymes

At Puratos, we know that enzymes are key for delivering all of the benefits bakers are seeking, including the clean(er) label trends. Produced by fermentation, enzymes find their origins in nature. A whole new generation of enzymes has been discovered in some of the most amazing locations on Earth, leading to innovative products and bread functionalities such as short bite, softness and many more.

We use this new generation of enzymes to constantly upgrade our improver technologies and bring new technologies on the market to help our customers to better respond to consumers demand.

Answers to
the trends:
• TRANSPARENCY
• FRESHNESS

THREE EXAMPLES

1 Intens Strength

In an expedition to the Antarctic, one of the coldest places on Earth, a unique new family of xylanase enzymes was discovered. These enzymes have optimal activity at much lower temperatures compared to regular enzymes. This means that their strength and tolerance properties will come into play even in cold doughs. This makes Puratos Intens Strength especially suited for improvers in frozen bakery applications.

2 Intens Short Bite

In one of the Yellowstone National Park's hot springs, scientists discovered an enzyme that is active at significantly higher temperatures than usual. Researchers discovered that this enzyme has a positive effect on the texture of the bread, more specifically, by providing a pleasant short bite effect in bakery applications. Intens Short Bite is mainly used in bakery solutions for medium to rich breads.

3 Intens Soft & Fine

While exploring the magnificent Hunan Forest in Southern China, scientists found a new enzyme on wood. This enzyme is responsible for breaking down plant material into soft, moist elements that liberate nutrients which then nourish new life. Intens Soft & Fine brings softness to the bread, as well as a finer and whiter crumb in toast breads, buns, brioche and other soft and rich applications.

For more information contact Joke Braet: JBraet@puratos.com



INNOVATION

Answers to the trends:

- TASTE
- NEXT LEVEL EXPERIENCE
- FRESHNESS



PÂTISSERIE

Smoobees Texture is the new taste

A breakthrough creation grasping the latest consumer trend: texture is the new taste. *SMOOBEEES* are soft beads that offer a creamy texture while ensuring rich taste in every bite. They come in different flavours and are unlike any other inclusion currently on the market.

Not only does it allow bakers to add a soft and smooth texture to baked goods without injection equipment, it also offers them a new flavour palate to play with. Building on consumer preferences, the smooth texture and rich taste profile of *SMOOBEEES* offer a new sensorial, visual and taste experience to discover.

Adding fillings, fresh fruit or other inclusions to cakes can often be technically challenging for producers (need for injection equipment, frozen storage, limited bake stability, ...).

Puratos' latest innovation addresses this challenge: it offers producers a new creative playground to explore, without having to adapt their production processes. Moreover, while other inclusions can dry out produce over time (dried fruits, chocolate chunks, ...), *SMOOBEEES* add extra indulgence, freshness and moist, flavourful pockets to every bite of cake.

With *SMOOBEEES*, Puratos strikes the perfect balance between innovative texture and classic taste, enabling professionals to develop a new range of inspirational and creative cakes previously unthinkable.

The new inclusion was launched in different flavours (lemon, blueberry and caramel), across various European countries along 2020.

For more information go to puratos.com/products/smoobees or contact Sara Louwagie: SLouwagie@puratos.com



Amber Caramel, a trending flavour

Caramel, soft or salted, is known worldwide. As a taste it has made a come-back as a top trending flavour,* arising both in chocolate confectionery as well as in patisserie creations. By crafting our brand new Amber chocolate we take this trending flavour to the next level.

Amber gemstone offers a bright and warm colour, is versatile in use, and boosts creativity. It results from a slow and natural process of fossilisation of the resin from trees, which gives it this stunning colour. Just like this gemstone; we give our Amber chocolate time to express taste at its fullest.



Belcolade is renowned for its white chocolate's taste and workability. Our experts have combined this know-how to come up with the top-notch quality recipe for Amber and adjusted the chocolate-making process where needed. We worked and tested until our innovation team achieved. Like cutting a diamond, we took time. With one focus only: creating true taste!

The secret lies in a slow and gentle conching, enhancing a specific and complex flavour bouquet, without using artificial flavours. Its taste profile takes you from a naturally salted-butter caramel boost to more creamy and cooked milk notes. As part of the Cacao-Trace range, it also benefits the cocoa farmers, who receive a Chocolate Bonus (of €0,10) for every kilo of chocolate sold.

The delightful Amber caramel taste is also available within our compound chocolate range with Carat Coverlux Amber. Our experts have crafted the perfect combination between the soft and creamy caramel flavour notes and the outstanding quality and functionalities of Carat Coverlux, which provides a premium taste coupled with excellent snap, shine, and mouthfeel.



Answers to
the trends:

- TASTE
- CRAFT
- ETHICAL LIFESTYLE

* source: Mintel, Chocolate confectionery, New product launches from 2014-2019

For more information
contact Cathie Cazus:
CCazus@puratos.com



Conclusion of the COVID-19 updates

Our global research shows that the coronacrisis has strengthened and reshaped existing trends.

1 *Taste*

- Remains #1 criterion for baked goods.
- Affordable indulgence.

2 *Health*

- Even more important.
- Focus on hygiene; functional food boosts immunity.

3 *Freshness*

- Fresh and packaged to prevent contamination.





4 *Craft*

- Artisans are most trustworthy.
- Boost for home-baking and sourdough.

5 *Ethical lifestyle*

- Even more important.
- Local sourcing. Sustainable packaging.

6 *Transparency*

- Even more important.
- Enabled by (blockchain) technology.

7 *Ultimate convenience*

- More online sales, take-away and delivery.

8 *Next level experience*

- Challenging due to new hygiene protocols.
- From out-of-home to in-home.

9 *Hyper personal*

- No expected impact on this trend.



A world of inspiration

Puratos aims to inspire its customers on a day to day basis.
Follow us on these channels.

Stories & recipes

On the blog section of our corporate website, we weekly publish new recipe ideas for creative, seasonal and festive finished goods. Next to that we tell you all there is to know about our new innovations, our heritage, our products, and our commitments to our people and planet.

 puratos.com/blog

Trends & insights

We will continue to track the evolution of the Taste Tomorrow trends and will regularly share trend updates: like trend deep-dives, interviews with industry experts or cool concept lists.

 tastetomorrow.com

Knowledge base

Browse our overview of the most frequently asked questions about bread, patisserie and chocolate. Answered by our expert team of product developers, nutritionists and technical advisors.

 puratos.com/knowledge-base

Video's

Puratos TV is all about inspiring you to create even better finished goods. Curious to see more? You will find monthly updates here.

 puratos.com/puratos-tv

Virtual innovation center

The Virtual Innovation Center can provide one-on-one assistance on every aspect of product development. The support features:

- Live Chat sessions with international and local technical advisors who can provide personalised solutions to customers' challenges.
- A Virtual Advisor offering customers 24/7 advice on their finished goods.
- A Recipe Database (180+) where customers can find the inspiration to create tomorrow's recipes.

 poppr.be/virtualtour/puratos_innovationcenter





The Puratos magic

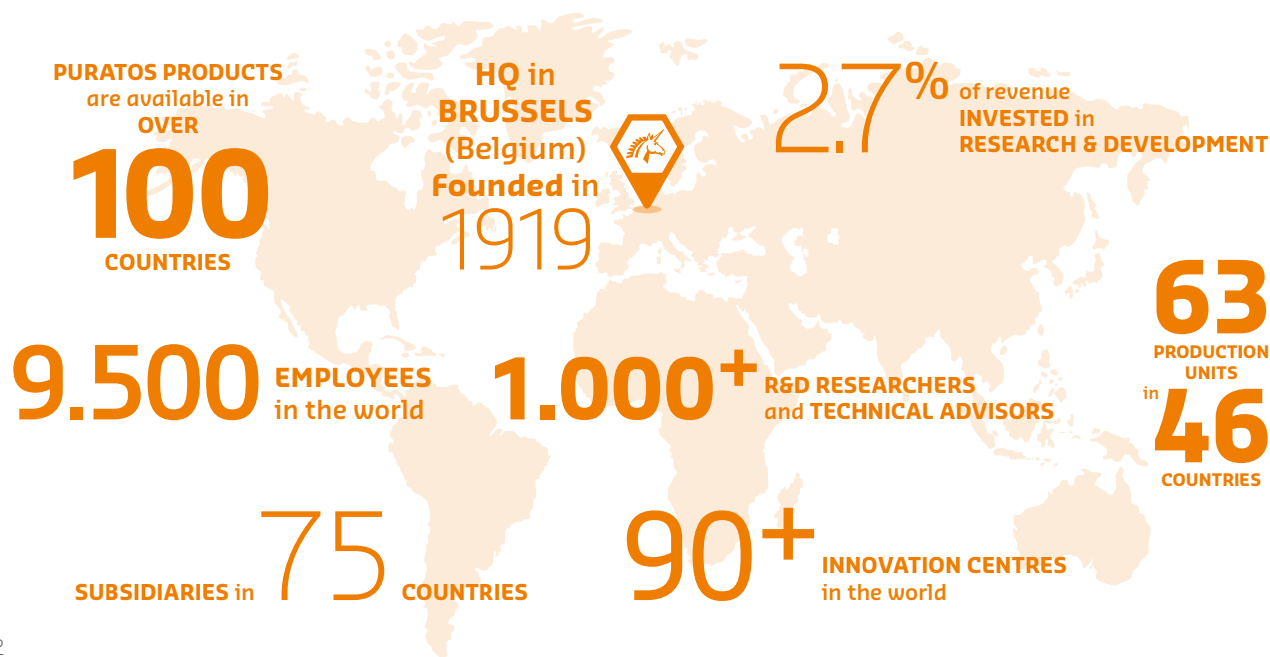
Puratos is an international group, which offers a full range of innovative products and application expertise for artisans, industry, retailers and food service customers in the bakery, patisserie and chocolate sectors. We aim to be 'reliable partners in innovation' across the globe to help our customers deliver nutritious and tasty food to their local communities.

The Puratos magic

Everywhere we work, we get close to people. We work hard to understand the culture of the country and their unique way of doing things. This is for two reasons: to better serve the customers in those countries, but also to immerse ourselves so we can share and celebrate that culture locally and globally.

With diversity we combine consistency: we share the same values and we have developed a common way of doing things globally – we call it the 'Puratos magic'. It all comes from our experience of working across cultures with the very best bakers, patissiers and chocolatiers.

Facts & figures





Inspiration & Innovation

For everyone we work with, we want to be a source of new ideas and confidence. We see that people increasingly expect higher standards in their food – standards of both quality and inspiration. So we work with our customers as reliable partners in innovation to help meet these expectations. Our approach is based on six core Puratos values.

1 *Team spirit*

Team spirit is an essential part of the way we do business. We believe that the whole exceeds the sum of the parts. Put simply, by working together we can achieve more and have more fun.

4 *Courage*

Passion is nothing without courage. Seizing opportunities requires a certain amount of bravery: never be afraid to try new things.

2 *Passion*

With great passion we help our customers to grow their business through new ideas. With great passion we create a working environment that stimulates people to develop, and rewards their enthusiasm with trust and support.

5 *Quality*

Getting it right first time, every time – and always looking to improve. There is no better expression of our daily drive for quality.

3 *Ethics*

In everything we do, ethics drive our decisions. Being true to our conscience, maintaining our professional standards, honouring our commitments and assuring absolute food safety.

6 *Vision*

Innovation requires vision. The vision to build on experience. To search eagerly for new horizons. And to help our customers to prepare for an ever changing future.

This Taste Tomorrow booklet is a publication of Puratos. Taste Tomorrow is the world's largest ecosystem for consumer understanding in bakery, patisserie and chocolate. Want to learn more? Visit tastetomorrow.com or contact your local representative.

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Shoot My Food

Research

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On our Taste Tomorrow website you can stay up to date with regular updates on Taste Tomorrow trends. During the year you can read trend articles, blog posts by our internal experts and interviews with industry leaders.

 tastetomorrow.com

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