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Advancements in Customized Equipment Could Drive The F&B Processing Market



There is a growing demand for food products globally due to several factors. These include: population growth, increasing disposable income, and rising awareness on health and wellness among older and younger populations. These factors have not only contributed to the greater need for processing and packaging equipment, but also forced food processors to look for advanced technologies that are more efficient and offer higher production output compared to the traditional machines.

Growth in the global food and beverage processing and packaging equipment market looks promising over the next four years. Frost & Sullivan's latest analysis reveals that improved economic conditions in emerging nations, changing dietary preferences globally, and a rising demand for nutritious and ready-to-eat food products are driving demand for food processors and boosting growth in the packaging equipment market. The global food and beverages processing and packaging equipment market is expected to expand at a CAGR of 4 percent from 2017 until 2022 and reach USD78.6 billion. "With increasing food and beverages product demand and a growing emphasis on food safety, food processors are reliant on equipment manufacturers to provide processing and packaging equipment that is agile and utilizes advanced technologies to minimize energy usage, operate at a higher efficiency, and improve yield," said Arun Ramesh, Team Lead, Agriculture and Nutrition, Visionary Science, Frost & Sullivan.

The global demand for food products has led equipment manufacturers to acquire, merge, and partner with companies to leverage technology innovation. To remain competitive in an evolving market, Ramesh recommends that players create smarter products by investing in new capabilities such as advanced data and analytics, robotics

and automation, and extend their capabilities to offer full solutions, including installation, monitoring, services, and integration. Additional factors imperative to growth include:

- Equipment manufacturers upgrading to advanced machinery for processing and packaging to cater to changing consumer preferences and consumption patterns
- Using machine learning and other tools to predict process delays, make improvements to engineering and optimize equipment design
- Refreshing operating models with an emphasis on enhanced after-sales and growth-focused strategies

This Issue!

foodHQ's February 2019 issue covers the latest developments & happenings in the food industry, including new innovations, products, services, projects, interviews, and events. The article on page 06 discusses the latest trends in bakery ingredients. On page 24, learn the best disposal methods of food wastes. On page 46, Harbinder Kathuria, Sidel's Vice President Beverages Equipment Sales Middle East, Africa & India talked to us in an exclusive interview about Sidel's projects for 2019 and how the company is helping manufactures to achieve superior performance throughout the entire lifecycle of their packaging lines. Additional stories are also available, covering the latest activities of regional manufacturers, importers and exporters. We love to receive your comments, suggestions or feedback! Please send them to info@foodhq.world

Best Wishes!

Rola Hamdan Ghutmi
Editor-in-Chief

CPH Team

(Email domain is @cph.world)

Founders

- Mr. Fathi Chatila (1936-2017)
- Mrs. Mona Chatila (1944 - 2006)

Management

• **Administrative & General Manager
Business Development & Project Manager**
Rabih Chatila / rabih@

• **Senior Administrative Officer**
Abdul Rahman Hallak / ar.hallak@

Content & Research

• **Editor-in-Chief**
Rola Hamdan Ghutmi / content@

• **Interim Content & Research Manager
/ Digital & Social Media Officer**
Fatima Saab / fsaab@

Marketing & Sales

• **Marketing & Sales Manager**
Jad L. Aboulhosn / j.aboulhosn@

Accounting & Finance

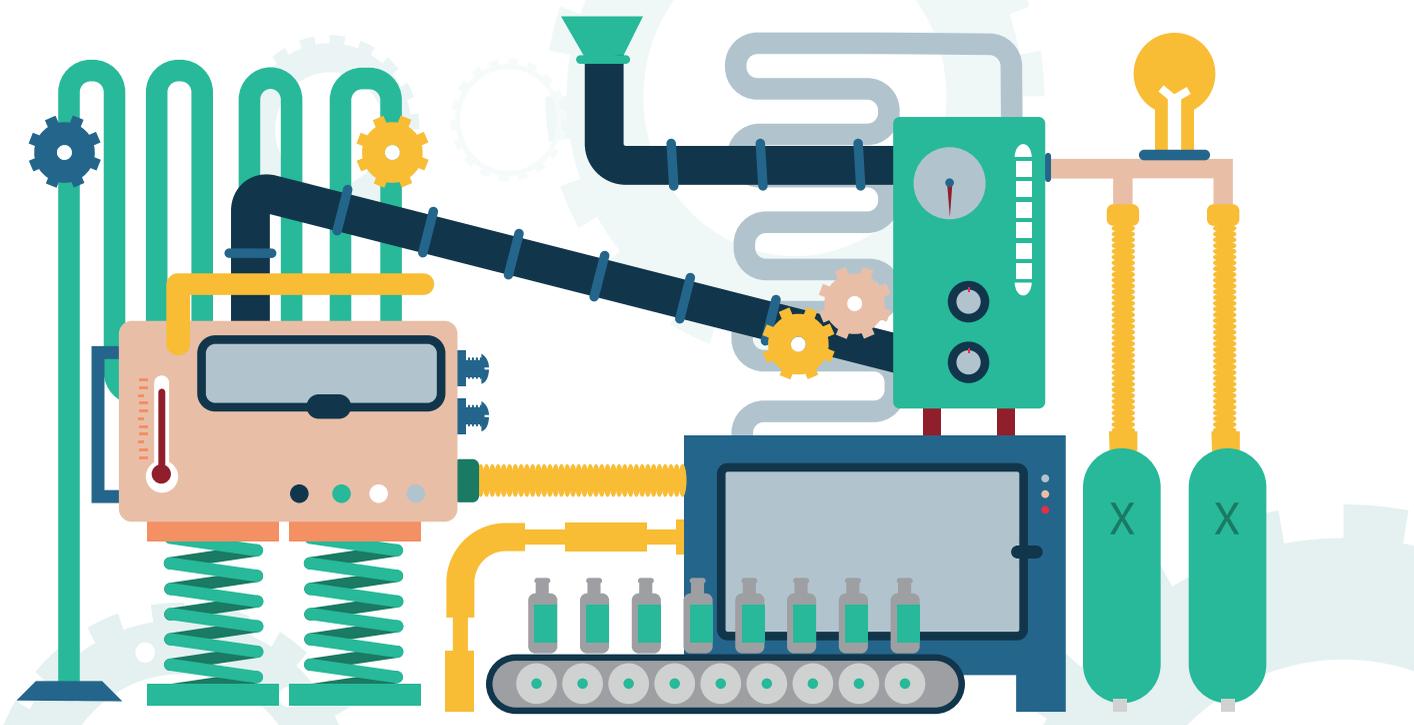
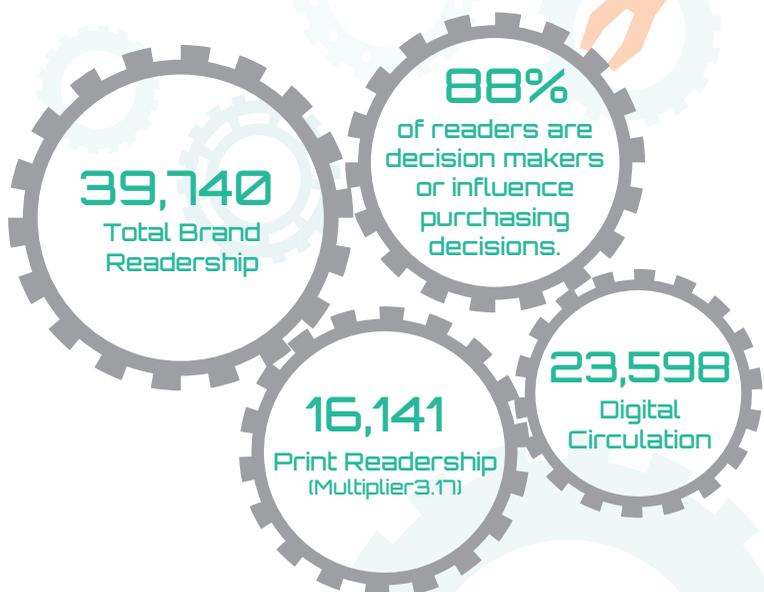
• **Accountant**
Hala Nizam / h.nizam@

Circulation & Mail

• **Circulation & Mail Manager**
Abdul Rahman Hallak / ar.hallak@

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ABCC Reveals Commissioning of Study on Food Security

The Arab Brazilian Chamber of Commerce (**ABCC**) successfully took part in the recently concluded 6th Arab Conference for investment in Food Security, which was held recently in Fujairah. The ABCC contingent was led by its President, *Ruben Hannun* and accompanied by *Tamer Mansour*, Director and *Tâmara Machado*, Senior Marketing Analyst. During the event, the ABCC revealed that it has commissioned the Center for Advanced Studies in Applied Economics (CEPEA) at the Escola Superior de Agricultura Luiz de Queiros – Esalq (USP School of Agriculture) to conduct a study on food security to help identify Brazilian-Arab opportunities.



Majid Al Futtaim Opens City Centre Suhar

Majid Al Futtaim, the well-known shopping mall, communities, retail and leisure pioneer across the Middle East, Africa and Asia, opened its fourth shopping and leisure destination in Oman, City Centre Suhar. The USD 117 million mall houses some of the most sought-after international and regional retail stores, exciting entertainment and leisure experiences, and varied dining options from cafes to family restaurants. City Centre Suhar will service a population of 570,370 residents in the burgeoning port city and industrial hub, Suhar, and surrounding districts, Liwa and Shinas.



Kellogg Signs Long-Term Partnership Agreement

Kellogg Company, the world's well-known cereal company; second largest producer of cookies, crackers and savory snacks; a leading North American frozen foods company; and owner of **Bisco Misr**, Egypt's famous biscuits company and Mass Food company, recently signed a partnership agreement with the Food Banking Regional Network (FBRN), a non-profit organization that serves as an umbrella organization for food banks in the region and seeks to eliminate regional hunger through founding, developing and supporting food banks in the region in cooperation with broad spectrum of partners, sponsors and members.



ESMA To Develop the Legislation of the F&B Industry

The Emirates Authority for Standardization and Metrology (**ESMA**) has examined the possibility of developing the legislative structure in the food industry at the federal level, in coordination with the private sector. ESMA has signed a memorandum of understanding, Monday, with the group of food and beverage manufacturers, represented by the 575-member, which manages investments worth 39.5 billion dirhams. In parallel, ESMA has organized a discussion to about 40 leading manufacturers, suppliers and traders, touched to cooperate and coordinate them in developing standards related to food products. Among regulators, regulators and producers.



Flavored Milk Has Gained Popularity in India

Flavored milk market in India has witnessed a tremendous growth in recent years. Some of the factors which have added to this growth are rising urbanization, lifestyle changes, introduction of new flavors and product varieties. Flavored milk has gained popularity in India on account of its numerous benefits. It offers ease of convenience, longer shelf-life and can be consumed directly without any need of boiling. Moreover, it contributes only 4 percent of the added sugar to the consumers as compared to the soft drinks and non-carbonated sweetened beverages, which contain around 40 percent of the added sugar.



Americans Plan to Increase Their Plant-Based Intake

As Americans look to improve their overall health and wellness in the New Year, YouGov, a global public opinion and data company, conducted a survey for Kite Hill that uncovered consumers' health goals in the New Year and their perceptions of plant-based products. The survey of over 1,200 US adults suggests that improved health and wellness is a concern for many consumers, with 40 percent feeling motivated to make a diet or lifestyle change after the holidays in light of overindulging. The pursuit of wellness was a clear indicator of consumer mindset, with the survey revealing that roughly a third (34 percent) of Americans would consider incorporating plant-based foods into their diet.

Ingredients



Current Trends in Bakery Ingredients

The bakery industry is one of the fastest growing sectors and the global bakery products market is expected to reach USD530 billion by 2021, owing to an increase in the demand for convenience foods such as biscuits, bread, pastries, and cakes. For a high-protein claim, 20 percent of the energy value is derived from protein without compromising on taste or texture.

Soy protein concentrates and isolates contribute emulsification and textural control in bakery products. Pea protein isolate is an alternative protein source containing branched chain amino acids such as leucine, isoleucine, arginine, valine, and lysine. Pea flour, a rich source of protein and fiber, may be incorporated in cookies and bread up to 5 percent to enhance the nutritional quality of the product. Bakery products targeting the senior market may be calcium-enriched (milk or whey), to reduce osteoporosis. High oleic sunflower and EPA/DHA omega-3 oil may be included as a source of PUFAs in bakery products such as bread and crackers.

Egg replacers cut on production costs, reduce the incidence of allergens, and create possibilities for the production of vegetarian baked products. A blend of xanthan gum, guar gum, sugarcane fiber and soy lecithin can improve texture and cell structure in cakes, muffins, and cookies and replace eggs at 0.3 percent usage levels. Algal flour can replace eggs in a variety of applications, while reducing fat and total calories and maintaining the desired taste and texture.

Emulsifiers such as sodium stearoyl-2-lactylate (SSL), calcium stearoyl lactylate (CSL) and diacetyl tartaric acid esters of monodiglycerides (DATEM) function as dough strengtheners and crumb softeners (monoacylglycerols and glycerol monostearate). DATEM produces voluminous baked goods at levels of around 350 g in 100 kg product. Lecithin at levels of 40-140 g per 100 kg of flour for flour treatment improves the processing characteristics and stability of the dough. Sucrose esters as emulsifiers are produced in a wide range of HLB, with the high-HLB variants producing good effects on volume yield and crumb structure. Mono- and diglycerides such as glyceryl monostearate functions as an antistaling agent. Marine-based hydrocolloids such as sodium alginate and κ-carrageenan are able to



reduce the loss of moisture during the storage of bread and the dehydration rate of crumb, thus inducing an antistaling effect.

Sodium caseinate, which has excellent surfactant properties, is known to increase water absorption in flour systems and is very effective as an improver in wheat bread, prepared by a straight dough baking process. Carboxymethyl cellulose (CMC), a water-soluble gum, helps retain moisture, and improves the volume yield during baking by encouraging gas bubble formation. The hydrocolloid, chitosan (deacetylated chitin), increases water migration rate from crumb to crust and prevents amylose-lipid complexation and staling in bread.

Enzymes help to increase the volume of baked goods and improve the crumb structure, shape, and crust color. Amylases and lipases improve the softness of bread and cakes and retain freshness on storage. Enzymes cut costs by excluding additional ingredients such as emulsifiers and gluten. Food phosphates find versatile uses as leavening acidulants, pH and buffering agents, and dough conditioners.

Polyols or sugar alcohols, a group of reduced-calorie sweeteners, are a group of low-digestible carbohydrates, which can replace sucrose. The polyols include erythritol,

lactitol, mannitol, sorbitol, xylitol, lactitol, maltitol, hydrogenated starch hydrolyzate, and others. Lactitol, sorbitol and maltitol can replace sugar in low-fat, sugar-free cookies. Glycerol at 2-10 percent by weight can increase the shelf life and shelf stability of wheat and corn tortillas by decreasing water activity.

Color hues of red and orange may be produced with the coloring ability of the paprika oleoresin carotenoids such as capsanthin, capsorubin, and β -carotene. Oleoresins contain fats, waxes, resinoids, and color, which act as fixatives for the volatile flavoring principles to withstand the high-temperature processing conditions. Ginger oleoresin and oil can replace ground ginger in gingerbread and cookies. Marigold oleoresin, a rich source of lutein palmitate, stearate, and myristate esters, may be used to color bakery products. The water-soluble extract of annatto seeds, norbixin, provides yellow to orange color. Curcumin, a bright orange-yellow colorant, protects against rancidity in bakery products. Lycopene extract from tomato provides color shades of red to yellow and functions as an antioxidant to prevent the free radical degradation of cells. A concentrated natural fruit flavor paste from blueberry adds the subtle taste of blueberry and a desirable hue to frostings and filling creams in cakes. Cookies may be produced with added fruit extracts of goji berry, strawberry cranberry, raspberry, papaya and others. Prune juice concentrate inhibits mold development in bakery products due to its high malic acid content and small amounts of benzoic and salicylic acid.

Flavor extracts such as chocolate, cocoa extracts, coffee, tea extracts, and fenugreek extract, and vanilla oleoresin may be used in bread and bakery products. Bakery emulsions, the water-based alternatives to baking extracts, are preferred over alcohol-based extracts as they are more stable to heat. Bakery emulsions of lemon, strawberry, coffee, cream cheese, hazelnut, orange, strawberry, pumpkin spice, and cinnamon spice are available on the market. Ginger extract, honey powder, jujube extract powder, yogurt powder, almond extract, and sweet corn powder provide flavor to bakery products such as cookies, bread, and crackers.

Soluble dietary fiber, such as fructooligosaccharide, can replace 30 percent sugar in cookies, without any negative impact on texture. Inulin or soluble corn fiber may be incorporated in reduced-fat products to improve

eating quality and shelf-life. Ancient grains such as amaranth, quinoa, sorghum, and teff are a good source of fiber. Apple or orange fiber, as a source of soluble and insoluble dietary fiber, may be used as bakery ingredients. Shortbread cookies have been incorporated with resistant starch to help maintain healthy blood sugar levels and increase satiety in diabetics. Corn maltodextrin has been shown to replace 30 percent fat in cookies.

Gluten-free products offer solutions to the aging population and those with a primary health concern with respect to the rising incidence of obesity, diabetes, and celiac disease. The global market for gluten-free products market, currently valued at USD4.63 billion, is projected to reach USD7.59 billion by 2020, at a CAGR of 10.4 percent, owing to digestive health and weight management concerns. Due to the easy availability of corn, oats, sorghum, and quinoa, product innovations for bakery products have been based on these sources. Whole-wheat fiber breads and gluten-free bread products are ideal breads to deliver bitter-free green tea extract for the health-conscious consumers.

Calcium propionate at 0.3 percent concentration at pH 4.5 and a water activity of 0.93-0.97 can control spoilage molds in bread. The essential oil of clove and cinnamon are strong antifungal agents against *Aspergillus* and *Penicillium* species. In the near future, nanotechnology would be applied to deliver nutrients and flavors into bakery products, for e.g., the encapsulation of flavors to be released at some desired point of time and the encapsulation of nutrients such as iron, folic acid, calcium, and vitamins.

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The bakery industry is one of the fastest growing sectors and the global bakery products market is expected to reach USD530 billion by 2021



Dr. Sajilata Gopalakrishnan
Chief Scientific Officer
Nature Pure Supercritical Extracts Pvt Ltd.
www.naturepureextracts.com

European Bakery Market: Mature and Transforming

The European bakery market, with a size of approximately 40 mln ton products, USD240 bln turnover and a forecasted growth of 3.3 percent till 2023) will remain one of the most vital bakery markets in the world for the coming years. What are the trends and developments in terms of bakery product demand and innovations? And how is this influencing the operations?

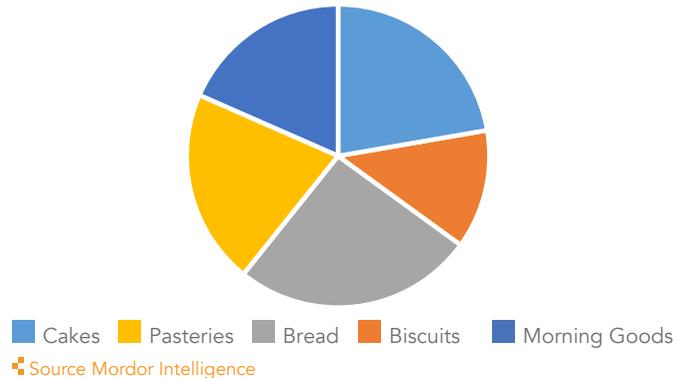
In many European countries bakery products are consumed as staple food. The market is well established in terms of product array, distribution channels, regulations, innovation platforms and consumer preferences. However the sector is undergoing significant changes due to increasing health concerns, rising disposable income and high demand for convenient food products.

Apart from convenience, European consumers are looking for instant and nutritious food products to help them reducing their calorie and sugar intake, without lessening of taste or pleasure. The most consumed bakery products include biscuits and breads while the demand for other bakery items such as cakes, pastries and cookies are also increasing. Breads and rolls have dominated the baked goods segment, while pizzas have the highest potential growth due to higher demand for frozen as well as chilled pizzas. Germany is the market leader in the European baked products markets with a growth of 3.0 percent per year, followed by UK with a growth of 2.9 percent per year.

Trends & developments in bakery products

- Changing consumer lifestyles for a healthy living drives the growth of bakery products such as cakes, biscuits, bread, pastries and morning goods;
- Developments and innovation are geared towards the addition of healthy and specialty ingredients in bakery products. European consumers prefer natural and allergy-free additives in their staple food;
- The key trends include gluten-free, wholegrain, ancient grain and additive free bakery products;
- Elderly population prefers to consume low calorie, low sodium and high-fiber breakfast cereals;
- Increasing tourism drives the growing demand for instant, ready to eat, globally known, low cost and easy to store products such as doughnuts and muffins. As a result, the number of low hurdle outlets, such as small kiosks and road side shops, are growing.

Bakery Product Market Share (%): by Product Type, Europe



Challenges and opportunities

- Aging population and focus on health are driving EU consumers to look for healthier alternatives such as fresh, organic, artisan, added-value and ethnic baked goods;
- Gluten-free and organic products are other forces driving the bakery market to meet the increasing nutritional demands;
- The bakery sector is quite competitive. Its dynamic in terms of innovation and quick response to consumer demands;
- The growth of European baked products market is driven by the increased demand for healthy, instant and nutritious baked products;
- The traditional morning goods in Europe are witnessing the rise of gluten-free, wholegrain, ancient grain and additive free products. These products have high sales potential in the coming years as consumers don't want to lose taste with healthy ingredients;
- Environmentally friendly packaging are set to impact the consumer choices as well as manufacturer's product mix and promotional strategies;
- Modern retail channels, driven by hard-discounters, are crowding the market strongly;
- Both ends of the market, the premium segment and low-price products, are growing;
- Reducing food waste and an emphasis on local production are attracting attention in almost all countries.

Bakery market-wise, European bakeries are continuously looking for innovations to expand their product portfolio, launching new products and adopt packing-level modifications such as environment friendly packaging, increased shelf lives of baked products, easy to carry and easy to eat products.



New Concept Offers Indulgent High-Protein Biscuits Without the Downsides



AFI Biscuits

A new concept from **Arla Foods Ingredients** will help biscuit manufacturers tap into the high-protein and healthy indulgence trends while overcoming technical challenges. According to Mintel, one in four consumers now looks for cookies or biscuits that are high in protein. The number of sweet and savoury biscuit launches in North America and Europe featuring protein claims has more than doubled in the last five years. However, producing indulgent, high-protein biscuits can come with processing and sensory challenges. Arla Foods Ingredients' new Whey-Pro Biscuit concept features Nutrilac®, the company's whey protein ingredient, in an indulgent biscuit recipe with a premium look, taste and feel. The concept was designed to create biscuits with the right structure and appearance after baking, as well as low water activity for long-lasting crispness and low risk of microbiological spoilage. It helps overcome issues such as unpleasant aftertaste and unattractive appearance, and qualifies for a high-protein claim in the EU. *Lene Hald*, Senior Category Manager, Bakery, at Arla Foods Ingredients, said: "High-protein and healthy indulgence

are both important trends in the baked goods category. Biscuit manufacturers who tap into them have a great opportunity to grow their market share. Our new concept demonstrates that it's definitely possible to combine a high-protein claim with an indulgent taste and texture, while overcoming technical challenges." The Whey-Pro Biscuit concept will be on show at Health Ingredients Europe (Frankfurt, 27-29 November).



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Pastazym PD Greatly Improves the Cooking Tolerance of Pasta



❏ Pastazym PD is classified as a "clean label" product

Pasta tends to stick together quickly if it is cooked or kept hot too long. The quality and therefore the cooking tolerance of the pasta suffer considerably, especially when low-protein flours are used. In Pastazym PD, the Ahrensburg flour expert **Mühlenchemie** has developed a new enzyme system that ensures excellent cooking stability of the pasta even under extreme conditions. Not only does this have a positive influence on consumers' purchasing decisions; above all, it proves extremely useful in the food service sector. The optimal raw material for producing high-quality pasta is hard wheat, but fluctuating wheat qualities, restricted availability and unstable prices are increasingly causing pasta manufacturers to resort to soft wheat or mixtures of hard and soft wheat. Pasta with this composition has considerably less tolerance in respect of cooking times, and the desired al dente bite of the pasta is lost. Just a small amount of Pastazym PD – 40 g per 100 kg flour

– extends the cooking time to as long as 20 minutes and ensures a pleasant mouth feel as well as reducing the stickiness of the cooked pasta. Mühlenchemie's innovative enzyme was first used at high altitudes, where the reduced air pressure lowered the boiling point of the water. This in turn increased the cooking time for the pasta. With Pastazym PD, it was possible to achieve acceptable quality in spite of prolonged cooking times of up to 20 minutes, with a significant difference as compared to untreated pasta. The use of Pastazym PD is also of interest to pasta manufacturers who supply companies in the food service and restaurant sectors; these are then able to guarantee their customers uniformly high quality in spite of long standing times and frequent re-heating of the pasta. Pasta manufactured with the addition of Pastazym PD is classified as a "clean label" product and does not require adjustment of the label declaration – a fact that makes it particularly attractive to consumers.

Packaging



The Digitalization of Food Palletizing

The technological and social revolutions of the past few decades have completely reshaped industry. The food packaging and palletizing industry is no exception. In fact, the last ten years alone has seen the adoption of advanced technologies at an unprecedented rate. Alan Spreckley, robotics food and beverage segment manager, and palletizing robotics expert at ABB, explains how digitalization is repackaging the future of food palletizing.

The last two decades have seen a decline in the nuclear family and a global rise in the number of private households with only a single occupant. In 2014, the UK office of national statistics (ONS) conducted a study that found 28 percent of UK households had only one inhabitant. Likewise, the labor force survey (LFS) showed that one-third of European households are single-person, while the United States has been experiencing a significant increase of single person households since the 1920s.

This growing trend places a higher demand for single-portion servings of pre-prepared and pre-packaged food on the food industry, which makes the packaging and palletizing processes less linear than they have previously been. Similarly, the unstable economy of recent years has nurtured a generation of savvy customers, eager for the special offers and deals that retailers regularly provide, further complicating the palletizing process. This leads to scenarios where manufacturers will be required to change palletizing patterns quickly and cost-efficiently.

To keep pace with this changing demand, plant managers and process engineers must ensure that the palletizing process is as efficient and effective as possible. This means keeping systems maintained and palletizing patterns up-to-date, while minimizing any risk of downtime or hindered performance.

To make these processes easier to manage, plant managers have been increasingly turning to new technological solutions; solutions that are a step beyond the traditional automation systems, or machines that have previously improved industrial performance. In the twenty-first century, digital technologies and software are proving to be the unconventional ally of the modern plant manager.

Virtual Commissioning

Robots have been a staple of the food industry since the



1980s, with most businesses using at least one robotic system for some part of the production line. Palletizing robots have proven particularly popular among plant engineers as they increase productivity, improve working conditions and can be easily integrated into existing production systems.

However, the process of integrating palletizing robots has traditionally relied on computer assisted design (CAD) drawings and involved a lot of estimation. Food plant managers provide approximate dimensions to robot manufacturers for the robot and leave the rest in the hands of the manufacturer, who tests the product in its own facility before finalizing and installing onsite.

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To minimize unproductive
downtime, the process of virtual
commissioning is becoming
increasingly popular among
plant managers

While this approach is sufficient for some businesses, it can open up several performance problems. For example, CAD drawings alone do not necessarily provide an accurate representation of the operating environment, and the robots still need to be programmed after installation. This lengthens periods of unproductive downtime to accommodate the placement and programming of a new robot.

To minimize unproductive downtime, the process of virtual commissioning is becoming increasingly popular among plant managers. Instead of using CAD drawings and developing robots in an external environment, the process is modeled in 3D, which provides an accurate visualization of a factory layout. This allows plant engineers to see a digital representation of how the robot will integrate and move within the process, and allows them to discover and resolve any potential technical issues before they become a reality, reducing commissioning time by up to 25 percent.

For example, one of the most common causes of damage to palletizing robots is collision with a cell's support pillar during operation. By using a virtual commissioning platform, these instances of collision can be fully discovered and resolved in a time- and cost-efficient manner on the computer. This helps minimize the actual, physical commissioning.

Remote Condition Monitoring

Once commissioned, robots are machines like any other and they are susceptible to component wear over time. As such, regular maintenance is required to ensure that everything is functioning effectively and safely.

This doesn't pose much of a problem for plants that are ahead of the curve and running on an Industrial Internet of Things (IIoT) network. IIoT allows engineers to access cloud data to assess the performance of machinery remotely and schedule maintenance work accordingly. This level of information provides plant engineers with advance notice when service is required. Plant managers can then resolve this with maintenance work before breakage or unproductive downtime occurs.

Real-Time Offline Programming

While virtual commissioning and remote monitoring technologies both keep factories running, it is the development of offline programming software that yields efficiency benefits for plant managers. This is software that allows the remote programming of palletizing robots without interrupting production.



Innovation In Action



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For example, if a retailer usually asks for four-packs of tinned soup but decides to offer a 50 percent-extra-free offer for a period of time, the palletizing robot will be required to change palletizing patterns accordingly. Failure to do this effectively could result in businesses being unable to supply a sufficient amount of product to retailers, which leads to lost contracts and the risk of heavy supplier fines.

Plant managers can prevent this by digitally reprogramming palletizing robots using offline software, which can be accessed using a standard PC to change palletizing patterns. This reduces the time taken to change over and boosts overall productivity to ensure that demands are met.

In the nineteenth and twentieth centuries, the automotive sector was one of the most technologically advanced and adaptive industries. If the past decade is anything to go by, the food industry is quickly building a similar reputation. By thinking more about digital solutions to production problems, plant managers can ensure that food processing becomes the automotive industry of the modern age, easily coping with the demands of the nuclear family and single-occupier households.

“

To minimize unproductive downtime, the process of virtual commissioning is becoming increasingly popular among plant managers



Alan Spreckley
Robotics Food and Beverage Segment Manager
ABB
Published first on
www.manufacturing.net

Drawing the Lines of Success

MEPEQ is specialized in providing customized automation solutions to the industry in Middle East and Africa. With its international partners, the company engineers solutions to reduce man power, increase efficiency and enhance performance, using the latest technology in automation and material handling. And because every project is customized and unique, MEPEQ sends the experts to understand customer needs and study a solution accordingly. The whole system architecture will be designed, to fit in all the required equipment within the available space, taking into consideration the accessibility and logistics to allow for better operation and optimum material flow.

Recent product development:

Middle East has seen a high demand and consumption of dairy product in the recent years. And because producing dairy product should be done under a very sophisticated production conditions, and the assurance of quality and safety is an essential need, MEPEQ the expert on conveyor production follows the EHEDG



guideline to ensure conformity to the hygienic equipment design standards using round headings, Stainless steel materials, less surface contacts, sloped surfaces, flush grid belts, Automatic CIP, that assure highly hygienic and cleanable stainless steel system with an automatic washing program that eliminate all bacteria's and mold cultures deposits on the conveyor during production. Its Conveyor and Automation Solutions are designed and controlled to insure a high efficiency, which tends to increase the production capacity, minimize product damage, reduce downtime and decrease production cost.

BEUMER Group Automated Parcel Sorter Goes Live at Whistl's Super Depot



Sorter combines high levels of service, speed and cost efficiency

BEUMER Group, a global supplier of automated parcel and post distribution systems, announces the live operation of an automated sortation system installed in Whistl's new super depot in Bolton, UK. The automated cross-belt loop sorter will ensure faster sortation with greater capacity for e-commerce packets and parcels (cardboard boxes, jiffy bags, poly-wraps) up to the medium size. Cost-effective sortation combined with reduced levels of energy consumption enhance Whistl's commitment to considering the environment, in addition to the competitive and economic factors of each procurement decision. As the UK's second largest postal operator, Whistl contracted BEUMER to install the automated sorter in the new super depot. The depot operates as the designated hub for Whistl's sortation operations in the North West of the UK, which is one of the UK's leading logistics and distribution areas. Designed to enable Whistl to achieve further expansion to support the soaring e-commerce market, the ergonomic design of the sorter's man/machine interface also supports Whistl's drive to provide a clean, safe and secure work environment. In addition to the overall design of the sorter, BEUMER Group tested the interface to ensure that operators would experience minimal twisting and turning and no repetitive stress. Whistl's CEO, *Nick Wells*, CEO explains "The meticulous design of BEUMER Group's sortation system enables Whistl to achieve greater efficiency in the processing of packets and parcels. This is an essential part of Whistl's growth strategy in responding to the continued growth in the e-commerce market."



Innovation In Action



FOOD PROCESSING SYSTEMS FOR NUTS

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TEMPERATURE



Global Smart Oven Market to Bring in Revenues of Nearly USD403 Mn

Increase in urban population, rise in disposable income, and rising working population in emerging economies are contributing to the changing lifestyle of individuals. This changing lifestyle has continuously encouraged users to look for convenient home and kitchen appliances which complements their living standards. Smart ovens provide safety, convenience, timely alerts, reduction in waste, and runs on remote access which helps consumers to operate it from any location. Improved living standards have significantly contributed to the growth of the smart oven market. The market is expected to see a healthy growth rate during the forecast period (2018 - 2026).

The multiple function type of the global smart oven market is expected to hold the major market share during the forecast period and is estimated to bring in revenues of nearly USD403 Mn by the end of 2026. Multiple function smart ovens, on account of their wide usage in residential application and due to multiple features offered such as grilling and convection constituted 68.4 percent share in 2017. Multiple function segment is expected to expand at a good growth rate during the forecast period on account of rising urbanization. This is also estimated to create an incremental opportunity to the smart oven market due to changing lifestyle and need for trendy kitchen designs.

Increasing preference for trendy kitchen appliances across the globe directly benefits the smart oven market. Wide acceptance of built-in smart ovens in residential as well as commercial applications is expected to augment the demand for smart ovens during the forecast period. Demand for Wi-Fi connectivity in smart ovens has gone up in recent years due to growth of IoT and increased use of Wi-Fi/Bluetooth connectivity in home appliances and in order to meet the needs of a growing population. This is expected to complement the demand for smart ovens during the forecast period. The reason for the growth of the smart oven market with capacity of 20-25 liters is that end-users prefer larger capacity ovens if the same is available by spending a little more. Furthermore, rising investments in the residential construction sector across the globe directly benefits the smart oven market. Growth of IoT and increased use of Wi-Fi/Bluetooth connectivity in kitchen appliances is expected to augment the demand for smart ovens during the forecast period.



In terms of distribution channel, the online segment is expected to expand at the highest CAGR during the forecast period due to rapid urbanization, technological advancements, and convenience. This is also estimated to create an incremental opportunity to the smart oven market due to convenience of online distribution.

North America and Europe are the most advanced regions in terms of technology usage, infrastructure, and urbanization. Hence, these regions have emerged as attractive destinations for manufacturers of smart oven with advanced connectivity and more cooking options as compared to Asia Pacific and Middle East regions. The market in Europe is expected to grow at the highest growth rate during the forecast period due to continuous growth in residential construction and customer preference toward trendy kitchen designs and advanced products in the kitchen. The market share of smart ovens in North America was 35.4 percent in 2017 followed by Europe.

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Growth of IoT and increased use of Wi-Fi/Bluetooth connectivity in kitchen appliances is expected to augment the demand for smart ovens



Cover Story



Blockchain Technology in Food Industry: Potential Uses & Challenges

Blockchain technology is considered as revolutionary invention, which can significantly change the food industry by increasing efficiency, transparency and collaboration throughout the food system.

What is blockchain technology?

Don & Alex Tapscott, authors Blockchain Revolution (2016) defines the blockchain as “an incorruptible digital ledger of economic transactions that can be programmed to record not just financial transactions but virtually everything of value.” This technology offers an alternative way to store information using technology, which has traditionally been done using databases. Blockchain is the underlying technology ensuring transactions are accurate, transparent and immutable.

Advantages of blockchain in food processing

A blockchain ledger can record each sequence of transactions in a product’s journey from raw materials at source to a finished product on a shelf in a way that is secure, transparent and trustworthy. This can be applied to both simple process (i.e. grow, harvest, pack, deliver) as well as cases whereby potentially hundreds of steps/ components are brought together to complete a finished good (i.e. a mass-produced lasagne ready meal).

Blockchain provides end-to-end traceability because the entire ecosystem shares a single, tamper-resistant ledger of information that can only be updated through consensus. Participants can view their section of the same information in a permissioned, trusted and scalable network. This enables ecosystem participants to exchange data and transact with trust, improving transparency and efficiency within the supply chain.

This brings huge advantages for every actor within the supply chain. For food producers, the blockchain means that any attempts to tamper with a food item as it moves through the supply chain can be immediately identified and prevented before the food ever reaches the retailer. For retailers, if a potentially hazardous food product somehow makes it onto shelves, stores can identify and remove only the offending items, eliminating the need for costly batch recalls.

For consumers, the blockchain offers the transparency and openness needed to reassure them that the food



they eat is exactly what the label says it is. The ability for consumers to identify high quality food is currently prohibited by information asymmetry.

Challenges of blockchain in food processing

The trials carried out by Authenticate, a company that has been providing transparency to food supply chains for more than 8 years, identified four key challenges for the blockchain in food industry:

Source data: At the sharp end of the supply chain, whether picking olives, or breeding beef, additional data capture, or in some cases any data capture, is challenging from a practical perspective. Producers view any additional ‘paperwork’ as burdensome, adding little value to them at the current time. One exception to this may be in the case of high-value products where brand protection is important. Until the time comes when all food production from farm to fork is automated, there will be a need for real people to add data manually – herein lies greatest challenge.

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A blockchain ledger can record each sequence of transactions in a product’s journey from raw materials at source to a finished product on a shelf

Data duplication: Most suppliers will already have their own ERP system in some form, so having to enter data manually into a blockchain that is separate from their own internal systems creates additional cost. Individual suppliers track their own activity and inventory, therefore entering additional data into an external system that doesn't directly benefit them (yet) will receive little support. Creation of data interchange standards and adapters in common ERP systems would greatly simplify this; blockchain does not make internal data systems redundant, so until there are better ways of integrating data, the duplication of data presents a significant stumbling block.

Food is generally dissembled, not assembled: While most products are built, food products are often chopped up, so although tracing an individual cow is quite possible, this becomes harder once it is slaughtered and sent to a cutting plant. Once separated and processed, the origins of these distinct parts become far more difficult to preserve. Whilst blockchain could eliminate the flagrant fraud of packs being relabeled, it remains a challenge to accurately track individual animals from farm to fork.

Reasonable Transparency: Blockchain implicitly creates transparency, so a default model would be that everyone within the eco-system or industry could see what inventory everyone else had and what transactions had been carried out between suppliers. For commercial reasons, this may not be desirable, and there is a trade-off between creating traceability and transparency and protecting individual businesses. This is obviously not just the case for the food industry; recording where a shipment of diamonds was on a public blockchain in order to prove that they had come from a legitimate source would create a shiny new target for criminals.

In an increasingly volatile market, the blockchain adds an extra level of security for the food industry. But still, virtually every sector that is using blockchain technologies is still in its infancy, and there are many factors not dictated by technology that are affecting adoption.



Fatima Saab
Interim Content & Research Manager
Digital & Social Media Officer

Digital Innovation Boosts Middle East's USD650 Million Startup Market

As the Middle East and North Africa's startup market nears USD650 million, global social entrepreneurship organization Ashoka, global technology company SAP, and members of the World Economic Forum's Global Shapers Community have joined forces to drive dialogue and action with social entrepreneurs during the recent Global Entrepreneurship Week 2018 in Bahrain. The Middle East and North Africa's digital startup ecosystem is rapidly growing, with funding reaching USD 650 million from 270 deals in 2017, according to a recent report by ArabNet and Dubai SME. During the recent ChangemakerXchange Talks and Actions at the University of Bahrain and Brinc Batelco IoT Hub, six startup leaders presented, inspired, and empowered young people and social entrepreneurs to embark and scale their startup journeys. The event was part of a larger effort to celebrate entrepreneurship during Global Entrepreneurship Week 2018, promoted by Tamkeen. "Strong turnout at the ChangemakerXchange Talks and Actions shows Middle East entrepreneurs are global leaders in using technology to make a social impact,"



said Batoul Hussein, Director of Corporate Social Responsibility, SAP MENA. "By fostering connections, learning, and collaboration, SAP and Ashoka are helping startups to scale, exchange best practices, and foster social change." Lana Al Attar, Founder of Bahrain's Gudjuju digital agency with a conscious, talked on "Using Technology to Empower Good." Saad Hamid, the CEO of Pakistani digital consultancy DEMO and founder of the SkillsFirst digital skills bootcamp, presented on "What Does Opportunity Mean in a Digital World?".

Brewing Blockchain: Tracing Ethically Sourced Coffee



A survey by the National Coffee Association finds that 64 percent of Americans, age 18 and over, drink coffee daily. After factoring in the less-caffeinated casual coffee drinker, this results in 400 million cups of coffee consumed daily in the United States. That may seem like a lot, until compared with most European countries who drink even more coffee on a per-capita basis. All this to say, there are a lot of coffee drinkers! Yet despite this growing coffee culture, most consumers have no idea where their coffee actually originates. While the coffee we drink may be advertised as "100 percent Brazilian Arabica," this provides about as much detail as saying our leather shoes come from a cow somewhere in Brazil.

As consumers, we typically delegate the responsibility of knowing a product's origin to the organization from which it was purchased. However, the organization itself is often unaware of the product's origin and unable to verify any existing knowledge. Consequently, there are significant challenges in trust and transparency across the complete supply chain for coffee and other products.

Coffee accountability

One of the biggest challenges facing this industry is the use of unethical labor practices.

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While retailers may not buy directly from blacklisted plantations, they lack the full ability to trace and verify the provenance of each bean. Even the largest coffee retailers in the global coffee market cannot guarantee the use of ethical labor practices in the plantations that supply their coffee. Why? Because they have limited upstream visibility within a complicated supply chain of middlemen, resellers and shippers.

Tracing compliance

Blockchain has the unique characteristic of immutability. Once data has been written to the blockchain, it cannot be removed or edited. Couple that characteristic with the ability to automatically record data to the blockchain without human intervention and you have a cryptographically secure, tamper-proof record of transactions. In the coffee industry, there are two key components necessary to verify that beans have been ethically sourced.

Coffee origin

In general, supply chains have been slow to adopt new technologies, with much of the transaction and legal documentation still paper-based. By digitizing these workflows not only can organizations reduce costs, they can also introduce trust and transparency into their supply chain. Coffee beans can be traced using simple radio frequency identification device (RFID) tags attached to the coffee bags or other transportation containers, which can be scanned at each point along the supply chain. Organizations can also record characteristics such as the coffee variety, processing method, bean grade and even sugar content to ensure the beans inside the container match the data associated with the RFID tag.

Labor compliance

One of the biggest problems facing coffee plantations are lack of worker documentation, non-existent labor contracts and forced labor or low pay. When plantations utilize forced labor, one of the first things they seek to do is erase documentation associated with the workers; as such, the first step in addressing this problem is to document the workers. Once each worker has trusted identification represented on the blockchain, plantation owners can then create and record a labor contract that specifies information such as payment terms, expected work hours or output, contract length and labor conditions. Workers can then receive payment digitally, of which the receipt is automatically recorded to the blockchain and payment confirmation is shared with organizations downstream.



While blockchain is capable of recording the data, the success of this use case is predicated upon its adoption and enforcement. Similar to other labor-practice certifications, farmers and cooperatives would be incentivized to adopt this solution as a means of increasing the value of their produce. Since data including origin, product quality and labor data can be verified, the beans would inherently represent less downstream risk increasing their appeal to buyers. As farmers seek to differentiate from competition and increase the value of their produce, more plantations and co-ops may adopt the solution. Eventually, there may be a tipping point where an origin country may enforce heavier regulation, requiring exporters to submit origin and labor compliance documentation prior to export approval.

Moving toward reality

While ending unethical labor practices with blockchain may sound overly optimistic, many of the technological and social components are already in place to bring it to reality. With farm to shelf food tracing, supply chain digitization and identity consortiums already using blockchain to disrupt their industries, connecting the pieces has potential to drive social change on a global scale.

While there have been innumerable technological advancements over the last 30 years, none of them have been able to solve the problem of trust. With the advent of blockchain, however, we can finally begin to solve these problems — all that remains is connecting the pieces.



John Widdifield
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Sustainability



Unconsumed Food Goes Beyond Food Security

Food is lost or wasted throughout the supply chain, from initial agricultural production down to final household consumption. It is the food that is lost during any of the four stages of the food supply chain: producers, processors, retailers, and consumers. One-third of food produced for human consumption is lost or wasted globally, which amounts to about 1.3 billion tons per year, according to the Food and Agriculture Organization (FAO).

Globally, 2bn tons of food wasted each year are equivalent to around USD1 trillion of financial loss each year. With limited land and water resources, reducing this massive wastage is crucial to help feed the global population in the near future. Reducing current food waste by just a quarter, would be enough to feed all of the world's hungry. By 2050, the world will need 60 percent more calories every day to feed 9 billion people. Cutting current food loss and waste levels in half will shrink the gap by 22 percent.

Reducing food waste is gathering increasing global interest and action around the world. Governments, research institutions, producers, distributors, retailers and consumers have all different ideas about the problem and the ability to change. The FAO-led Save Food initiative is partnering with international organizations, the private sector and civil society to enable food systems to reduce food loss and waste in both the developing and the industrialized world. As a step to this, in 2015 the US Department of Agriculture announced an initiative to reduce national food waste by 50 percent by 2030. Driven both by the need for greater food security as well as resource conservation, many see that this may soon become a target elsewhere as well: the EU has the same target by 2050.

From an ecological perspective, food wastage means that valuable natural resources are used to produce food that is ultimately not consumed. The production of wasted foods accounts for 10 percent of global greenhouse gasses and depletes a quarter of global freshwater.

Through an assessment of global food loss for the Rockefeller Foundation, Dalberg identified high-potential solutions underway in developing countries to reduce food loss and simultaneously improve farmer incomes. These promising interventions include:



Market-based models for low-cost, farm-based storage, preservation, and processing technologies: For example, hermetically sealed bags that preserve the quality of grains, vegetables, and seeds allow farmers to store and sell products later in the season when prices are higher.

Large commercial food companies' expanded operations in emerging markets that bring technology, infrastructure, and management discipline: For example, in an effort to commercialize and formalize its domestic supply chains, RelianceRetailIndia is investing in its cold chain infrastructure to reduce transport time of fruits and vegetables, thus limiting the possibility of food spoilage in transit.

Community investments in on-farm agro-processing solutions: For example, solar dryers can replace open-air drying, which is labor-intensive and leaves fruits and vegetables susceptible to weather and pests. Such dryers can be used in areas without access to electricity to produce export-grade produce. By pooling farmers' produce, a community can improve its ability to purchase these agro-processing tools.

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Reducing current food waste by just a quarter, would be enough to feed all of the world's hungry



Fatima Saab
Interim Content & Research Manager
Digital & Social Media Officer

Food Wastes Disposal Methods

Food waste is one of the most prominent waste streams across Middle East, especially in GCC region. The mushrooming of hotels, restaurants, fast-food joints and cafeterias in the Middle East region has resulted in the generation of huge quantities of food wastes. The proportion of food waste in municipal waste stream is gradually increasing and hence a proper food waste management strategy needs to be devised to ensure its eco-friendly and sustainable disposal in the Middle East.

Food waste is an untapped energy source that mostly ends up rotting in landfills, thereby releasing greenhouse gases into the atmosphere. Food waste includes organic wastes generated in hotels, restaurants, canteens, cafeterias, shopping malls and industrial parks in the form of leftover food, vegetable refuse, stale cooked and uncooked food, meat, teabags, napkins, extracted tea powder, milk products etc. It is difficult to treat or recycle food waste since it contains high levels of sodium salt and moisture, and is mixed with other waste during collection.

Food waste can be recycled by two main pathways:

Composting: A treatment that breaks down biodegradable waste by naturally occurring micro-organisms with oxygen, in an enclosed vessel or tunnel or pit.

Anaerobic digestion or biogas technology: A treatment that breaks down biodegradable waste in the absence of oxygen, producing a renewable energy (biogas) that can be used to generate electricity and heat.

Composting

Composting provides an alternative to landfill disposal of food waste, however it requires large areas of land, produces volatile organic compounds and consumes energy. Compost is organic material that can be used as a soil amendment or as a medium to grow plants. Mature compost is a stable material with a content called humus that is dark brown or black and has a soil-like, earthy smell. It is created by: combining organic wastes (e.g., yard trimmings, food wastes, manures) in proper ratios into piles, rows, or vessels; adding bulking agents (e.g., wood chips) as necessary to accelerate the breakdown of organic materials; and allowing the finished material to fully stabilize and mature through a curing process.



Anaerobic Digestion

Anaerobic digestion has been successfully used in several European and Asian countries to stabilize food wastes, and to provide beneficial end-products. Sweden, Austria, Denmark, Germany and England have led the way in developing new advanced biogas technologies and setting up new projects for conversion of food waste into energy. The relevance of biogas technology lies in the fact that it makes the best possible utilization of various organic wastes as a renewable source of clean energy. A biogas plant is a decentralized energy system, which can lead to self-sufficiency in heat and power needs, and at the same time reduces environmental pollution.

Of the different types of organic wastes available, food waste holds the highest potential in terms of economic exploitation as it contains high amount of carbon and can be efficiently converted into biogas and organic fertilizer. Food waste can either be utilized as a single substrate in a biogas plant, or can be co-digested with organic wastes like cow manure, poultry litter, sewage, crop residues, abattoir wastes etc.

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Compost is organic material that can be used as a soil amendment or as a medium to grow plants



Salman Zafar
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Following the successful premiere in 2017 **KHS** has now presented its award for innovative bottle designs for the second time running. The Dortmund manufacturer of filling and packaging systems for the beverage, food and non-food industries launched the project last year together with the School of Design at the University of Applied Sciences in Münster, Germany.

31 Functional Beverages

Processing



4 Trends That Are Shaking Up Functional Beverages

A Coke and a smile used to be all a beverage company needed to power profits. But a funny thing happened on the way to shareholder value: consumers have recently decided that carbonated sugar water doesn't please their palates like it once did. Why? Because drinks are no longer just about tasting good or merely satiating thirst. Consumers want more from their beverages, and they're looking at functional beverages as a way to reach their proactive health and wellness goals.

Winners in the rapidly shifting beverage landscape today are finding success in functional beverages. Functional health benefits are a major driver of beverage innovations. Here are just four of the specific consumer niches and benefit-driven trends manufacturers are capitalizing on to create value-driven and successful functional beverages.

1. Seniors represent a consumer segment in need of beverages that support health and wellness. The market opportunity for senior nutrition is large and yet quite underserved. For example, according to the UN's World Population Aging Report, the global population over the age of 60 is expected to grow by 56 percent by 2030, but if you look at supplemental nutritional drinks—just one segment of the beverage market for older adults—you can see a clear white space. In 2014, sales of supplemental nutrition drinks primarily targeting older adults in Western Europe and North America were USD1.4 billion, yet the baby food market in the same regions was USD14.2 billion, reported Euromonitor International. With underserved markets and a consumer focus on health and wellness, functional beverages with immune system health benefits have a prime opportunity.

2. Immune health is an emerging trend in the sports and performance beverage category. Athletes at all levels can face harsh environmental factors, such as increased exposure to crowds and travel exhaustion, as well as physical and psychological stress. These pressures can negatively impact the immune system and overall physical health, leading to missed training days or workouts, and adverse effects on performance goals. This concern among athletes presents a clear opportunity for beverage innovators to achieve marketplace differentiation with sports nutrition drinks that offer proven immune health benefits.



3. Stress affects us all and is quickly becoming a growing market for nutritional beverages. One of the most detrimental effects of stress is the suppression of the immune system and, therefore, a greater risk of illnesses such as upper respiratory tract infections. Science-backed ingredients that are clinically proven to support the immune system during times of stress can be incorporated into innovative beverage solutions to provide a compelling offer that addresses this concern.

4. On-the-go functional beverages for parents with young children. Keeping children well is a top concern for parents, because it's not just the children's health at stake, it's that of the entire family. As a result, a growing number of parents are looking to proactively support their children's health through functional beverages they can take with them, such as fruity waters, juices, smoothies, and dairy beverages.

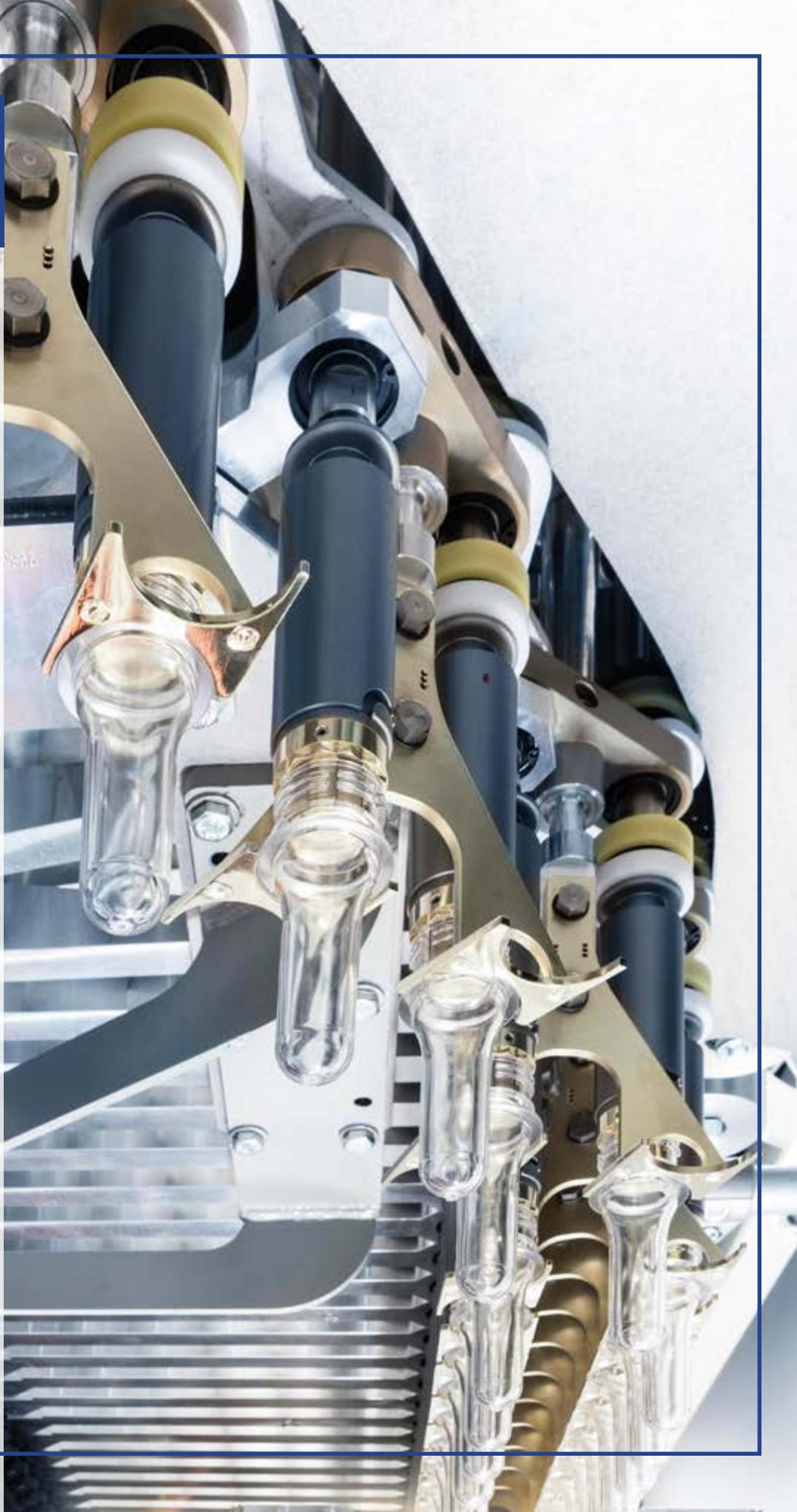
Overall, these trends are shaking up the growing functional beverage market. Brands that take advantage of them to create products that offer targeted benefits consumers can enjoy and feel good about will be better positioned to capture market share.

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*Functional health benefits are
a major driver of beverage
innovations*”



33 Germany
38 Taiwan
39 Turkey
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Country Reports



Germany: Europe's Food & Beverage Market Leader

With 82 million consumers and 170,000 products offered, it is no wonder that Germany is the largest retail market for food and beverage in Europe. With new cultural influences, changing culinary trends, increasing health awareness and an aging population, the German food and beverage market continues to offer business opportunities on various fronts.

The Numbers:

Fourth largest industry sector in Germany
USD278 bn in retail sales
USD77.7 bn in exported goods
Workforce of more than 600,000
USD206 bn in production value
(Source: BE and BMEL)

Market Segmentation:

The largest industry segments by production value are the meat and sausage industry (24 percent), the dairy industry (15 percent), baked goods (10 percent), and confectionary (8 percent) according to the BVE Annual Report.

The meat and sausage industry reached a production value of more than USD49 billion in 2017 according to GTAI. The major segments in terms of volume are pork (61 percent), chicken (17 percent), and beef (13 percent) with a total meat consumption of 60 kg per capita. Although the top three players account for around 60 percent of all slaughtering, the sector remains attractive thanks to traditional nutrition habits and the introduction of product variations. The increase in demand for organic meats has prompted an ever growing increase in the overall production of organically produced meat and sausages. Moreover, some meat processors have been incited to introduce meat-free product variations in order to accommodate the new rising vegan and vegetarian trends.

31.3 million tons of milk production and a total production that values around USD30.8 bn, make Germany the largest dairy producer in Europe and the fourth in the world as GTAI reports. It is also one of the country's most innovative food and beverage industry sectors. With more people following in the health and wellness trend, the growth opportunities for producers that focus on natural ingredients have been on a continuous rise. For example, sales of natural yogurts have grown by 50 percent since 2011 to reach USD6.86 bn in 2017 while sales of yogurts containing additives have decreased by 30 percent.



Germany is also European leader in the baked goods market with its production of bread and rolls. In 2017, industrial bakery production generated sales of more than USD19.4 bn, artisanal bakeries also created an added USD16.5 bn while food retail sales in the bread and baked goods area exceeded USD2.86 bn, according to GTAI. Due to a consolidation trend, the number of companies operating has been decreasing; yet, the industry is still home to many SMEs and big multinational companies. Industrial bakery production has exceeded artisanal production with the introduction of bake-off stations and in store baking which are expected to grow even more by offering manufacturers of premixes and dough sales opportunities.

Although confectionary accounts for only 8 percent of the industry, it still generates an USD13.6 bn production market due to high innovation levels and low barriers to new product entry as reported by BDSI. Cocoa and chocolate products (USD6 bn), are the leading segments in terms of market segments with fine pastries (USD2.4 bn) and sugar confectionery (USD1.83 bn) come in second and third place. There are fifteen companies in the industry that can be regarded as large enterprises and about 200 small and medium-sized players making the industry fairly fragmented. Germany is also the world's largest confectionary export with an above export rate of 60 percent equivalent to USD9.15 bn.

"31.3 million tons of milk production and a total production that values around USD30.8 bn, make Germany the largest dairy producer in Europe and the fourth in the world"

KHS Presents Design Award for Germ-Free PET Bottles to Students in Münster

Following the successful premiere in 2017 KHS has now presented its award for innovative bottle designs for the second time running. The Dortmund manufacturer of filling and packaging systems for the beverage, food and non-food industries launched the project last year together with the School of Design at the University of Applied Sciences in Münster, Germany. The task set by this year's student competition was to devise ideas for aseptic bottles. Various designs were submitted by the students, with the best three distinguished at a special award ceremony recently held at the university. During the last summer semester over 20 students majoring in product and communication design developed a number of innovative PET bottle ideas for the design competition initiated by KHS in cooperation with the Münster School of Design (MSD) at Münster's University of Applied Sciences. The aim was to come up with concepts for the aseptic filling of especially sensitive products. Besides developing 3D models a brand image and suitable marketing strategy were also to be



KHS' filling and packaging system

devised for the different beverages, some of which were invented by the students themselves. The bottles were judged at the beginning of July by the school's leading professors, Prof. *Torsten Wittenberg* and Prof. *Rüdiger Quass von Deyen*, and by KHS' bottle design experts. The awards were then presented at the University of Applied Sciences in Münster on November 22.

HERZA Schokolade Presents Novel Products

According to Innova Market Insights, one of the top trends of 2019 will be "adventurous consumers" on the lookout for new and unusual flavor experiences. The new little chocolate couverture pieces made from specific fine organic cocoa varieties, to be presented by **HERZA** for the first time at BioFach 2019, will enable manufacturers of sweets and bakery products, ice cream or cereals to benefit from this trend. Not only are the new products delicious for their pronounced, individual flavor; they also have a multitude of applications – for instance as chocolaty chips in muesli, ice cream or cake. Also they can be used for coating end products, since all four varieties can be melted very easily. The chocolate chips are made from individual varieties of high-quality fine cocoa from different countries of origin. The dark variety consists of 100 percent quality cocoa from the Dominican Republic. With a cocoa content of 55 percent, it offers a pleasantly tart, full-bodied and astringent taste with aromatic notes of dried fruits. The milk chocolate couverture chips, on the other hand, are made from pure fine cocoa from Madagascar. The high cocoa content of 40 percent



Organic fine chocolate

gives the chocolate an intensive, harmoniously balanced cocoa taste with a delicate roasted flavor and fruity elements – complemented by a slight vanilla note and pleasant sweetness. For manufacturers who set store by organic, fair trade products, HERZA offers special milk chocolate couverture pieces made from fine Peruvian cocoa. These have a particularly high cocoa content of 50 percent. The chips have a subtle milky note and a strong, woody cocoa character.

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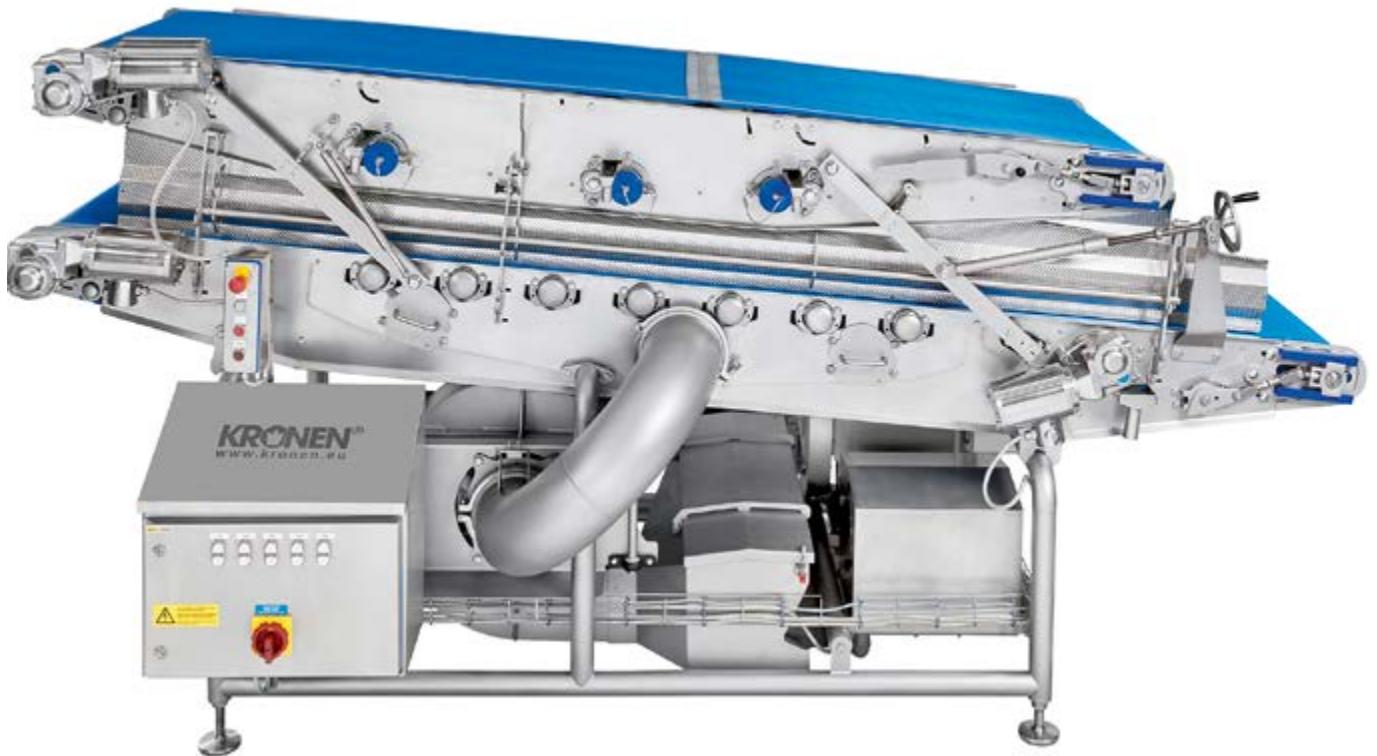
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KRONEN Presents Innovations for The Fresh-Cut Sector



■ BDS3000-800

"Industry 4.0" is a topic in all different kind of industries and it is actually reality in many areas already. It is about the interconnectivity of machines in production. Therefore, the machines need to be web-enabled, usually they are connected with a Wi-Fi network. By using the Internet connection the machines are able to communicate and to transfer information about the machines' conditions and the production's status to a central location in real-time and they can also receive instructions. The data is collected in a cloud for example and thus, it is visible for the user via a personal computer or mobile device. Furthermore, an entire production can be interconnected, in order that all the different machines within a processing line can communicate. "Industry 4.0" solutions provide the chance to make a production more efficient, for example in regards to productivity, flexibility, quality and safety. Besides, predictive maintenance can help to prevent breakdowns as well as costs which occur when production stops.

Another benefit of interconnecting several machines is that cable links can be reduced, which has a positive effect on cleaning and hygiene, too. **KRONEN** presents its "Industry 4.0" solutions at Fruit Logistica to a broader audience for the first time. Several KRONEN machines are available as web-enabled version as of now. These so-called "SMART" versions are displayed at the trade show. Among others the belt-cutting machine GS 10- 2 SMART and the washing machine DECONWA SMART can be experienced. Furthermore, visitors will be able to see how the interconnection of several machines works and thus, how a "SMART Factory" can be realized in the Fresh-cut sector. As usual, KRONEN demonstrates the new solutions live and in function and illustrates their use in practice. The SMART solutions are structured in a modular way: KRONEN offers a basic module. Beyond, the SMART Machines are individually adapted to the specific needs of the customers and the performance range can be expanded continuously throughout the future.

Packaged Food in Taiwan: Market Share and Future Trends

The Taiwanese food & grocery retail market had total revenues of USD101.5 billion in 2017, representing a compound annual growth rate (CAGR) of 3.5 percent between 2013 and 2017 according to Market Research. In the packaged food market in Taiwan retail sales reached over USD7.6 billion in 2016 (total retail sales reached USD39.4 billion) which represents a growth rate of 11.7 percent or over USD797 million since 2012 as reported by Euromonitor.

Market performance

Packaged food in Taiwan continued to show growth in retail value sales throughout 2018 and is expected to reach over USD8.7 billion by 2021 according to Market Research. Current value growth was reinforced by the positive performances of healthier and more innovative categories like snack bars, instant noodles, yoghurt, powder milk and prepared salads. This is due to the Taiwanese consumers' demands for healthier packaged food products

One aspect of the healthy eating trend is that many Taiwanese consumers are becoming more inclined to cook for themselves at home following the healthy eating trend that is growing around the world as more people become more conscientious about their food choices and the effect food has on overall health. However, due to busy lifestyles, these consumers often have limited time for cooking. This convenience factor is thus exerting a continuous influence over packaged food choices and consumption.

Large domestic packaged food manufacturers have been negatively affected by a series of food safety scandals in Taiwan in recent years. This has created opportunities for smaller domestic producers using ingredients from trusted sources to shine. It is also expected that competition in packaged food in Taiwan will intensify over the next few years in line with the influx of imported brands and the rise of niche domestic brands. Together with large and smaller local manufacturers, leading international producers and retailers will continue battling to increase their market value shares. This concentrated competition will no doubt, lead more innovation and encourage more effort to revamp existing brand images to cater to the growing demands of the Taiwanese people.



Distribution

Taiwan has the highest convenience store density in the world with one store per every 2,300 people according to Taiwan Chain Stored and Franchise Association. Convenience store chains are now providing oven-prepared, microwavable meals, bakery products, and other processed food products via retail channels. Convenience stores in Taiwan have become even more convenient than before. With 24-hour operation, when grocery and other retail stores are closed, consumers can access many types of services during off- hours.

While convenience stores remained the leading retail distribution channel for packaged food in value terms in Taiwan in 2018, it looks set to be overtaken by large supermarkets during the years ahead. International retail stores, taking advantage of Taiwan's geographical location, high population density, and high disposable incomes have been using aggressive expansion and marketing strategies. This has led to the traditional mom-and-pop shops and wet markets barely surviving amidst the continued and fierce competition from hypermarkets and convenience stores. Carrefour, COSTCO and RT-Mart are key players in the hypermarket sector while Wellcome, Simple Mart, PX Mart, CitySuper, Jason's Market Place and Taiwan Fresh Supermarket are active in the supermarket sectors. Meanwhile, 7-11, Family Mart, Hi-Life, and OK are the four major convenience store chains in Taiwan.

Fast Food in Turkey: A Sector on The Rise

Fast food has been the perfect answer to the increasing pace of today's world. Other than the clear benefit of its ready-in-minutes aspect, it is also a cheaper alternative to other food formats such as cafes or full serviced restaurants. The rising inflation and the decreasing exchange rate value of the Turkish lira against foreign currencies, coupled with price-sensitivity among consumers have all positively benefited the fast food sector in Turkey.

Convenience dining options are sweeping across the nation and with them comes a change in Turkish people's dining habits. These new changes indicate to suppliers how modifications in the Turkish society affect their market entry options.

Although fast food options are cheap, the overall market amounts to a multi-billion-dollar industry. Speaking in September 2017, Senior Manager of Domino's Pizza Turkey and Eurasia, Aslan Saranga, estimated the market's size at roughly USD2.4 billion according to World Food Istanbul.

Many leading companies in the fast food industry introduced innovations that targeted changing consumer preferences which has had a positive effect on the sector during 2017. As the main consumer base is made up of young people who increasingly prefer to taste new combinations that successfully merge local tastes with international formats, innovations and novelty are a must to keep the existing market share satisfied while trying to expand it.

While international brands and chains are well established in Turkey, domestic companies still own significant chunks of the market. TAB Gıda, in particular, continues to lead value sales, number of transactions and number of outlets according to Euromonitor. The company operates an extensive portfolio of brands within nearly all categories of fast food such as Burger King, Popeyes, Arby's, Usta Doner and Sbarro.

Since securing the rights to set up Burger King restaurants across Turkey in 1995, TAB Gıda has grown to control 40 percent of the entire convenience dining segment. According to TAB's website, it operates 1,132 restaurants as part of its empire, including some of the biggest American names in the business. TAB Gıda runs: 651 Burger King restaurants, 200 Popeyes chicken



restaurants, 135 Usta Dönerci doner restaurants, 78 Sbarro pizza restaurants and 68 Arby's sandwich restaurants.

However, despite this market dominance, there are still plenty of foreign franchises owned by other market competitors. For example, KFC in Turkey is owned by Dubai's Abraaj Group, which purchased the franchise rights from the American holding company Yum! Brands in 2015. McDonald's, which has been operating in Turkey for over 30 years, has just 225 outlets nationwide. A survey from Mediabrands and Insight Research provides a better look into Turkey's favorite fast food places. Participants were asked to rank their favorite chain, with the following results: Burger King came first with 46 percent, followed by Domino's 43 percent, and McDonald's with 36 percent, last but not least Baydöner scored 29 percent and KFC 25 percent. It is noteworthy that Baydöner seems to be the only Turkish cuisine, made by Turks and is a wholly Turkish-owned business to make the list.

Companies are also trying to strengthen their competitive advantage by increasing their investments in their online operations. With the ever growing use of internet and mobile internet within the younger generation, ordering online has been gaining momentum and seems to be the consumers' preferred choice. As a result, leading fast food companies continue to make significant investments in digitalization and service improvement for their online ordering systems. The new trend in terms of digitalization has been integrating the online ordering mechanisms through social media channels in general, and Facebook in particular.

Keeping Control of The Entire End-Of-Line Process



Marel weigh price labelers

Şenpiliç is a major poultry processor in Turkey, producing for the national and export market. To be able to ship the wide variety of processed chicken products to the right customers, their new greenfield plant requires some pretty complex logistics. No wonder **Marel Poultry** is Şenpiliç's choice when it comes to keeping control of all packing, batching and labeling operations. For Şenpiliç's new high-capacity poultry processing plant, it was a main concern to lay out a clear end-of-line logistics plan, allowing the handling of a multitude of end products. Nine Marel Weigh Price Labelers in total are in charge of this job now, all controlled by Innova software.

Keep the overview

The quantity and variation of products Şenpiliç has to dispatch at the end of the process line is quite extensive. To keep a clear overview of all these product flows in our plant, plant management needed professional support from a supplier who knows what they ask for. Marel is such a partner. Şenpiliç is very pleased with the solutions Marel offered and particularly with the way Innova software keeps control of everything. It connects every step of the packing process and ensures precise order fulfillment.

Giblets packed by MHW

Giblets are interesting products for the Turkish retail

market. Many Turkish supermarkets will have them packed in trays in their shelves. Şenpiliç and Marel Poultry have found a flexible solution to create such trays: two Marel MultiHead Weighers. One of them is weighing and batching gizzards, the other one does the same with hearts and livers. The products are allocated to one of the 14 pockets and each pocket gathers the contents for one tray until the target weight has been reached. After that, the fixed-weight batch is released to a tray, which is aligned on a conveyor belt underneath the MHW.

Pack, then batch

For the cut-up chicken pieces, Şenpiliç applies a different approach of batching and packing. The company has implemented two high-speed SmartLine Graders to grade their bone-in thighs and drumsticks. These leg pieces are the only products to be graded and batched automatically to compose fixed-weight trays.

All other cut-up pieces such as wings and fillets are packed manually to compose catch-weight trays, while whole birds are packed into individual bags. Concerning these products, Şenpiliç decided to batch them after packing. That's because the company uses the weighing function of its nine Weigh Price Labelers as a basis for batching operations downstream.

Macroeconomic Trends and the UAE Food & Beverage Industry

After a sharp decline in oil prices produced several years of macroeconomic slowdown, the UAE is projected to continue to have modest economic growth in 2018 but recover to 3 percent growth next year. Despite the sluggish economy, the UAE food and beverage industry has experienced consistent growth over the past five years, and restaurants in the UAE are uniquely positioned to capitalize on development projects across the country.

In addition to a steady uptick in global oil prices over the past year, positive economic projections are driven largely by Dubai's preparation to host the World's Expo in 2020. Additionally, Abu Dhabi's Vision 2030 diversification plans are spurring massive construction and sustainability projects. The addition of several new malls, hotels, airport and neighborhood expansions as well as theme parks and sports stadiums all offer local restaurant operators the opportunity to enter new markets or explore franchise opportunities. But competition remains fierce. Restaurateurs looking to expand in this market should take steps to develop their brands with strong product differentiation and invest in technologies that keep costs low and attract new customers.

How Oil Prices and Politics Have Impacted the UAE Economy

Despite ongoing attempts to diversify its economy, the UAE has historically remained vulnerable to fluctuations in oil prices. Beginning with the global financial crisis in 2008, demand for oil dropped as international credit remained tight for investors and as large oil importers, like the US, sought to move away from Middle Eastern resources by investing in domestic production and renewable alternatives. To offset declining oil prices and spur outside investment, the UAE tapped into its sovereign wealth fund to continue development projects. The decision to increase spending in the midst of declining oil revenues was further prioritized in 2011 in response to concerns that the Arab Spring protest wave could spread to GCC countries like the UAE, just as it had in Bahrain. Oil prices took another major hit in 2014, this time due to oversupply. New oil sources contributed to the glut, but Emirati and Saudi geopolitical considerations likely also played a role. After the



2015 Joint Comprehensive Plan of Action (JCPOA) eased international sanctions on Iranian oil, the UAE and Saudi Arabia continued rapid production. As production increased, the price of oil fell to a low of USD27 per barrel in February 2016. In late November 2016, the UAE and Saudi Arabia reached an agreement with OPEC to cut



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Email: sue@foodmachinery2000.com - www.foodmachinery2000.com

oil production and stabilize oil prices, likely spurred by the election of Donald Trump, who recently fulfilled his campaign promise to tear up the Iran nuclear deal. As the UAE pushes toward greater economic diversification, oil will remain an important tool for financing major national projects. As prices begin to rebound so too should government revenue, which suffered a 38.5 percent loss from late 2013 (~USD583b) to late 2016 (USD358.5b).

Why the UAE Food and Beverage Industry Continues to Grow

Buoyed by continued government expenditures on domestic construction and development projects, the food and beverage industry in the UAE has remained above the fray of fluctuating oil prices and geopolitical developments. Over the past five years, the UAE food and beverage market has grown 22 percent from USD10.8b in 2013 to a projected size of USD13.2b in 2018. The upcoming 2020 Expo in Dubai and Abu Dhabi's Vision 2030 diversification plans are fostering ongoing investment. In anticipation of the six-month World Expo, Dubai has embarked on numerous construction projects, including new malls, hotels, a record-breaking tower, airport and neighborhood expansion projects, theme parks, sports tourism, and other attractions. Abu Dhabi is also looking to bolster its standing as the UAE's cultural capital with the recently opened Louvre Abu Dhabi, a new airport terminal, and ongoing real estate and neighborhood expansion projects. Capitalizing on events like the World Expo to launch lasting economic development is not without precedent. For example, Chicago leveraged the World's Fair in 1893 to rebuild following the Great Fire of 1891 that destroyed much of the city. Each venue set to open across the UAE provides a unique opportunity for restaurateurs to expand or make inroads in the market. However, the future of the UAE hospitality industry is not based solely on the old adage that "if you build it, they will come." Other factors, like population growth and greater GDP per capita, will likely drive demand for restaurants. Within the UAE and the broader GCC, high temperatures coupled with a more traditionally conservative society have made indoor, family-friendly destinations like malls a popular destination. Higher projected population growth over the coming years and increased GDP per capita will increase foot traffic to such locations, and 87 percent of Abu Dhabi mall shoppers stop by a restaurant or café while shopping.

How to Thrive in the UAE Restaurant Industry

While continued domestic investments are likely to cushion the UAE restaurant industry from any major

shifts in oil prices or the geopolitical landscape, the market will nevertheless remain challenging for operators in the near term. In 2017, restaurants across the country continued to report flat or declining sales. These figures are largely driven by an oversupply of restaurants. To withstand this oversaturation, restaurant operators should focus their efforts on building a strong brand and identifying their unique position and story that distinguishes them from the competition. Strategic advertisements, both physical and digital, can help attract new customers. Restaurants in Levantine, Indian, or Italian (including pizza) cuisines are positioned to remain top performers, as local tastes continue to incline toward these segments. Further, while 90 percent of the UAE's food demand is satisfied through imports, the country is working toward sustainability by investing in new farms. Restaurant operators should consider sourcing their food locally, which could not only help cut costs but also attract customers looking to support (literally) homegrown industries. This is also true for local and regional brands. Currently, US brands claim 18 of the top 30 restaurant chains in the UAE. Three UAE-based chains appear in the top 20 of this list: Hatam, a casual-dining outlet that offers Persian food, Al Farooj Fresh, which specializes in chicken, and Karachi Darbur, a full-service restaurant offering Pakistani, Indian, and Chinese cuisine. As the UAE continues to focus on food independence and economic diversification, we can expect more room for local chains to flourish. Many observers worried that the new 5 percent value added tax (VAT), instituted on January 1, 2018, would push sales down as price-sensitive consumers sought quality products at a lower price point. The new tax did lead to the fastest input-cost inflation since 2011, but January registered the strongest employment growth in over two years in Dubai. To address flat or declining sales, restaurant operators should focus on leveraging technology and innovative concepts to optimize their operations and reduce costs. Mobile delivery apps can cut in-house services, and shared kitchen spaces can provide delivery-only offerings in untapped markets. Given the hot climate and congested traffic conditions in places like Dubai, restaurants leveraging innovative delivery options are poised to perform well.

Challenges aside, operators can still find success in the dynamic and competitive UAE restaurant market. Ultimately, restaurants with quality products that are willing to adopt innovative solutions will be the ones who succeed in the growing UAE restaurant industry.



UAE Imports Over USD450 Million Worth of French Produce In 2018



Bon Appétit dinner

With imports totaling USD452,280,000, the UAE is one of the largest importers of French produce to the Middle East, as revealed by the French trade agency. UAE residents have been invited to re-discover the diversity, quality and taste of some of France's most famous brands in a month-long partnership with **Carrefour**. Aptly named "Bon Appétit" week, a range of iconic French brands including Maille (mustard, sauce and vinegar), Lune de Miel (honey), Bonne Maman (jams), Perrier water, a range of cheeses and dairy products including Soignon, Président, Paysan Breton and Ile de France, Monin (syrup), Cadiou (shallots), Tipiak (couscous) and Lesieur (condiments) were all showcased. "As tastes evolve and become more sophisticated, so does the demand for quality products and ingredients. That is particularly true in the UAE where we have witnessed a 50 percent increase in demand for French F&B since 2010. "Primarily, this is down to the number of new luxury hotels and top independent restaurants opening, running in parallel with increased retail demand. Indeed, we strongly believe that there is great opportunity for French produce right across the Middle East," said *Edwina Salvatori*, Managing Director at **Sopexa** – international food communication and marketing agency. Globally, France exports over USD65 billion worth of food, making it the sixth largest exporter of produce in the world. The Middle East represented USD2.2 billion with Saudi Arabia and the UAE accounting for the majority, followed by Egypt and Lebanon. The most popular products being imported include beverages (30 percent), dairy (16 percent) and fruits (9 percent). As part of the celebration, a workshop for bloggers was led by the executive chef of Alserkal Avenue's Inked, Hadrien Villedieu, offering a special Christmas menu using only French produce.



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tna Co-Founders Alf And Nadia Taylor Honored With Ethnic Business Awards



tna at the Ethnic Business Awards

Food processing and packaging equipment manufacturer **tna** is pleased to announce that its co-founders Alf and Nadia Taylor have been awarded with the 2018 Ethnic Business Award in the "Medium to Large Business" category. Established in 1988, the Ethnic Business Awards are one of Australia's longest running business awards and were founded to recognize and reward the contribution of migrants to the Australian economy. The award was presented to Alf and Nadia Taylor at the 30th Ethnic Business Awards gala dinner, where the jury commended the couple for their entrepreneurship, personal dedication, global economic success and their contribution to not only the Australian economy, but also the community through their extensive philanthropic work.

"We're truly honored to have won such a prestigious award," comments Nadia Taylor, director and co-founder, tna. "When we first arrived in Australia, neither of us would have ever imagined that we would eventually turn our dream of owning our own business into a reality. We feel incredibly lucky to be one of Australia's many migrant success stories and are truly grateful for the opportunities this country has offered us. There are so many phenomenal and innovative businesses out there that would have never been possible without the sheer

dedication and determination of people from all parts of the worlds. All of them are proof that cultural diversity is a real asset to Australia and we feel very honored to be part of this very special group of visionaries."

Founded in 1982 by Alf Taylor, who immigrated to Australia from Scotland in 1966 and his wife Nadia, who arrived in Australia in the same year from her native Egypt, tna revolutionized the snack food industry by inventing the world's first high-speed vertical form fill and seal (VFFS) packaging system. The company has since grown from Australian packaging pioneer into a global leader of food processing and packaging solutions with 30 sales and support offices around the world and over 14,000 systems installed across more than 120 countries.

This year marked the 30th anniversary of the Ethnic Business Awards and saw over 450 business nominated, resulting in 12 finalists in three different categories (Small Business, Medium to Large Business and Indigenous in Business). The annually held Ethnic Business Awards are televised nationally across Australia, and are the country's longest running business award on television.

Kathuria: "Bottled Water Is Showing the Most Positive Trajectory of All Drink Categories In MEA"



Interview With Harbinder Kathuria Sidel's Vice President Beverages Equipment Sales Middle East, Africa & India

foodHQ spoke to Harbinder Kathuria, Sidel's Vice President Beverages Equipment Sales Middle East, Africa & India. Sidel is a well-known provider of equipment and services solutions for packaging beverage, food, home and personal care products. In this interview, Kathuria will tell us about Sidel's projects for 2019 and how the company is helping manufactures to achieve long term superior performance throughout the entire lifecycle of their packaging lines.

foodHQ: What are the services that Sidel offers to its consumers?

Harbinder Kathuria: Sidel is a leading provider of equipment and services for packaging beverage, food, home and personal care products in PET, can, glass and other materials. With over 40,000 machines installed in more than 190 countries, we have nearly 170 years of proven experience, with a strong focus on the factory of tomorrow with advanced systems, line engineering and innovation. Our 5,500+ employees worldwide are passionate about providing solutions that fulfil customer needs and boost the performance of their lines, products and businesses.

Delivering this level of performance requires that we

stay flexible. We continuously ensure we understand our customers' changing challenges and commit to meeting their unique performance and sustainability goals. We do this through dialogue and by understanding the needs of their markets, production and value chains. In turn, we apply our solid technical knowledge and smart data analytics to ensure lifetime productivity reaches its full potential. We call it Performance through Understanding.

foodHQ: What were the new products and solutions that you released in 2018?

Kathuria: Two key introductions from Sidel in 2018 are the EvoDECO labelling solutions and the EvoFILL Can filler. The new Sidel EvoDECO labelling solutions enable producers to deliver different stock keeping units (SKUs). Based on a common core and optimized design, they might either include several labelling applications in one multi-technology machine or a single labelling application through dedicated equipment, for optimized uptime, reduced footprint and low total cost of ownership (TCO). Able to handle different bottle formats and packaging materials, the EvoDECO platform gives beverage producers the possibility to choose solutions based on their specific labelling needs and output levels, without compromising on flexibility, efficiency or sustainability. On this latter aspect, the EvoDECO labelling solutions minimize resource consumption via the new melter and glue control distribution. With an integrated glue tank in the Roll-Fed labeler, patented vertical melter and heating control, glue is melted on demand and circulated always at a precise temperature and in smaller quantities, increasing the label quality application. This allows for reduced consumption of glue and avoids glue degradation, glue filament, and glue splashing, for better overall quality and improved sustainability. The solution offers 40 percent less electrical consumption and needs no gears and transmissions and therefore no lubrication.

Also our filling portfolio has been enriched in 2018. Addressing top hygienic requirements, EvoFILL Can is delivering top quality products at an advanced performance level. What sets EvoFILL Can apart from other solutions on the market is its external beverage tank and integrated small chamber. This concept ensures a better and more effective cleaning of all parts that come in contact with the beverage. Plus, the chamber is completely full and accommodates



EvofILL Can

the product only, making the cleaning easier and reducing costs of maintenance. On top of this, the external tank acts as an enabler for the Sidel BlendFILL configuration, the compact solution which combines the mixer and the filling buffer tank in one single skid. With an efficiency of 98.5 percent, the new EvoFILL Can significantly reduces TCO: the solution has the best filling accuracy – 1ml standard deviation ($\leq 500\text{ml}$ cans) – thanks to the new valve design, which generates less product waste. Additionally, the solution's CO₂ pre-flushing system results in reduced CO₂ consumption, while improving beverage quality and leading to greater performance. For beer producers, this means lower O₂ pick-up, down to 30 ppb, nonetheless saving resources. Also, its new drive system, enabled by servomotors minimizes TCO through savings on

maintenance and energy. Not less important, there is no risk of chemical agent or water residual, thanks to the fully cleanable handling parts with reduced top surfaces.

On top of the new labeler and new can filler, we of course also have to mention CoboAccess™_Pal, our new advanced industrial cobotic palletizer. Recognized as "Best Innovative Robotics Solution" at the 2018 PPMA Industry Awards, it leverages the advantages offered by cobotic solutions in terms of compactness, flexibility, production line efficiency, reliability and – especially – increased welfare for operators. Particularly suited for low-speed applications and underlining the company's commitment to help producers embrace Industry 4.0 opportunities, the solution is designed to handle Regular Slotted Container (RSC) and wrap-around blanks.

foodHQ: What's in the pipeline for 2019?

Kathuria: Next year, we are going to enrich our Agility 4.0™ portfolio with solutions contributing to maximized ease of use and minimal downtime. Moreover, we will strengthen our filling offering with innovations that target bottlers handling glass and PET as packaging materials. Of course, we will also continue to develop packaging solutions with sustainability at their core. The advantages of PET as a packaging material are numerous: It is strong, unbreakable, light, transparent, safe, and above all 100 percent recyclable. It is worth to notice how packaging design can encompass the principles of a circular economy in a world where brand image is not only a matter of look and feel, but more and more it has to be associated with the end user's conviction that the container will be re-used and recycled. This is why we are designing packaging systems (the bottle, plus the cap, plus the label) to be a resource and to offer the right protection to the product, so that the product itself is not wasted. Additionally, as a lightweight material, PET also offers considerable environmental benefits in the form of lower transport costs and reduced fuel emissions. Its unique geometric properties and inherent barrier properties, together with its design flexibility, have enabled food and beverage manufacturers to use less and less material in the packaging process, while optimizing energy use. These processes also help reduce waste and improve sustainability measures.

foodHQ: What would you say about the market's key challenges/drivers in your line of work?

Kathuria: Bottled water is showing the most positive trajectory of all drink categories in the Middle East and Africa. Featuring the highest PET share (90 percent), it is expected to feature a +9 percent CAGR in overall produced volume and a +8 percent CAGR in consumption (2018-2021). This growth trend is driven by consumers seeing bottled water as more than quenching thirst and expecting functional benefits (i.e. hydration, detox and a source of minerals, electrolytes and vitamins), thus creating opportunities for product premiumization. The CSD segment is showing different dynamics: for instance, the consumption of this kind of drinks in India and other Middle East countries is slowing - typically due to consumers becoming more health conscious and enjoying less sugary / healthier alternatives - while markets in Africa have strong potential, as a large segment of population enters the consumer class for the first time. This rising awareness concerning health aspects is both a challenge and an opportunity too: JNSDIT (juices, nectars, soft drinks, isotonic, teas) witness growth due to the consumer

paying more attention to the nutritional value and calorie content of the beverage. Talking packaging, we are noticing that PET is increasingly adopted as the material of choice by Liquid Dairy Products (LDP) manufacturers (+7 percent Compound Annual Growth Rate 2018-2021), (Euromonitor).

foodHQ: What's the highest profit margin line at Sidel? And, why do you think that is?

Kathuria: Combining global expertise with local proximity, Sidel is a full solution partner, helping Middle East, Africa & India producers, co-packers and brand owners achieve long term superior performance throughout the entire lifecycle of their packaging lines. We are enabling our customers to welcome business opportunities fueled by the macro trends we just covered, this is why we are increasingly selected as preferred suppliers. By collaborating with us and leveraging our expertise in engineering services, line design and integration, packaging development, machinery, production and after sale services, manufacturers gain access to a thorough understanding of the entire supply chain, from current market trends and changing consumer tastes to the challenges of liquid products distribution and local regulations all across the globe. Complete line solutions are becoming more and more a logical choice since they simplify the customers' reality from purchasing, installation and commissioning and, most importantly, throughout the line's operational lifetime.

Positive sales trajectory featured by categories like JNSDIT and LDP is also convincing many producers to trust our leadership in aseptic applications and adopt our Combi Predis™, an integrated blow-fill-seal-filler solution with dry preform sterilization, ensuring an aseptic production that is flexible, cost-effective and safe. Recently approved by Food and Drug Administration (FDA), the Sidel Aseptic Combi Predis merges dry preform sterilization with aseptic blowing, filling and sealing functions within a single production enclosure and respects the fundamental concept that underpins state-of-the-art aseptic packaging rules: producing a commercially sterile product, filled in a sterile zone, in a previously sterilized package. Compared to traditional aseptic filling systems, this solution offers optimal cost-efficiency and environmental footprint: it uses no water and almost no chemical for preform decontamination, plus allowing up to 45 percent reduction in electricity consumption. Since its launch, the Sidel Aseptic Combi Predis globally contributed to save 7 billion liters of water and 57,000 tons of PET, while producing 46 billion bottles.

FrieslandCampina Kievit Is Innovating in Clean Label, Sustainability, Foam and Other Functionalities



Interview With Fanny Weinbreck Global Development Director of Friesland Campina Kievit

foodHQ spoke to Fanny Weinbreck, Global Development Director of FrieslandCampina Kievit. The company is one of the leading global manufacturers of beverage and food ingredients, and it is trusted by the world's best loved brands to provide superior ingredient solutions. Weinbreck talked to us about the latest trends and what opportunities can they carry for manufacturers.

foodHQ: Can you brief us on the solutions offered by Friesland Campina Kievit?

Fanny Weinbreck: As part of global dairy company FrieslandCampina, Kievit focuses on 'healthier indulgence'. We firmly believe that moments of feeling good matter for everyone. Our aim is to enrich those feel good moments, by creating ingredients that add value for food and beverage manufacturers.

We aim to touch consumers' senses via our ingredient functionalities, improving the sensorial experience of consumers. For example: our foaming creamer line-up, Vana®-Cappa, includes ingredients that can provide a thicker, more indulgent foam. It also includes foaming creamers that can offer a whiter foam, which many consumers look for as Instagram-able, in turn giving them a feel-good moment. For food manufacturers, we recently launched a range of fat powders called Vana®-Lata, offering an authentic butter taste and full mouthfeel,

which we see as an indulgent trend in European countries. These are just a few examples of how we enrich moments of feeling good, together with our customers. As part of one of the world's largest dairy companies, we can tap into unique expertise and leverage growing knowledge, for instance regarding sustainability.

A good sensorial experience is not the only thing consumers crave in their food consumption. More and more consumers are scrutinizing labels, looking for healthy, sustainable and ethical product attributes. Though taste is always the most important reason to consume food and beverages, these additional aspects led us to emphasize more that Kievit is in the market of healthier indulgence. As a result, we've invested heavily in healthier and more sustainably and ethically produced ingredients, among other things.

In the area of healthier indulgence, we want to make the difference by bringing unique ingredients and experiences, both to consumers and to our customers. We're focusing on instant ingredients in coffee, tea, pastry, decoration, desserts, ice-cream and savory worldwide. Our ambition is to be the leading company in bringing daily luxurious consumption to everyone! By continuously innovating, we can provide high quality, functional and healthier ingredients, thus keeping our customers ahead of competition.

foodHQ: What opportunities can these products carry for manufacturers?

Weinbreck: We offer a broad, worldwide portfolio of (foaming) creamers, whipping agents, fat powders and emulsifiers. 'Glocalization' is very important in our markets, meaning that we tailor our offerings towards both the local taste preferences and heritage, as well as exporting those local nuances to other parts of the world.

All over the world our ingredients are used in numerous recipes, and the functionalities in those applications are very diverse. For example, in Vietnam people prefer a strong coffee taste, so our creamers must strengthen the taste of the coffee it's used with. In other countries, the creamer is used to mask a strong tea or coffee taste,

Exclusive

so our customers there want the opposite functionality. Whatever the functionality is, our ingredient portfolio is one of the largest in the world, so we can confidently say that we have solutions for all main challenges of the different regions worldwide.

Due to digitization and consumers becoming savvier, we also see that local offerings are travelling beyond their traditional border and going global. An example is the recent boom of matcha tea, which stretches far beyond Japan these days. Global players like Kievit have the ability to quickly bring concepts from one market to the other. We have foot on the ground in all six continents, often in the form of an innovation lab or demo kitchen. This gives us the ability to bring our customers into the room with us and quickly and locally adapt and export innovations.

With our innovation kitchen in Manila, our demo kitchen in Shanghai and our global FrieslandCampina research center in Wageningen, we have specialist teams in key growth regions. This includes, for example, an in-house global sensory panel. The experts are continuously trained in identifying many different sensory attributes. The unique data and insights are then translated by our international R&D and technical sales support teams, into – often patented – products and technologies. We can tap into a huge network of international scientists for this, to work on differentiating and relevant propositions with our customers.

An example of this way of working is our unprecedented research into ‘creaminess’, revealing eight attributes that define creaminess in 3-in-1 coffee applications across different continents. This study was conducted with a multidisciplinary team of specialists and resulted in a new FrieslandCampina Kievit creamer portfolio, addressing different preferences for a milkier through to a sweet flavor or a thick mouthfeel, delivering the right solution for customers from Rangoon to Manila.

foodHQ: How do you keep your products attractive for manufacturers?

Weinbreck: We strive for unique ingredients that surprise consumers and customers by going beyond their expectations. As we aim to be the frontrunner in innovation in our markets, innovation is very important for us.

We have a two-pillar innovation strategy that helps our customers bring innovative applications which both enhance consumers’ sensorial experiences, and brings our customers innovative technologies in areas like foam, sustainability, clean label and other functionalities.

The first innovation route focuses on the development

of applications that create unique sensorial experiences and surprise consumers. Look at the coffee market, for example: consumer demand not just a good taste and mouthfeel, but also products that appeal to the eye. This means that we need to make sure that the end-application of our customer is appealing and Instagram-able. For these kinds of unique innovations, we work side-by-side with our customers.

Innovation in the first pillar requires thorough analysis and an inspiring vision on consumer trends and market developments. We have our own unique methods and studies for this, studies that are owned by and available exclusively for us. For example, we have our own unique listening program and our extensive landscaping studies conducted by in-house sensorial experts. In 2019, we plan to reveal new data to the market, coupled with innovative applications.

The second innovation route focuses on developing and applying innovative ingredients and technologies that are used in our customers’ facilities. FrieslandCampina Kievit is passionate about what is inside coffee, creamers, foam, whipping agents, fat powders and the like.

Innovation in the second pillar requires state of the art knowledge of the technological innovations and a network of food technologies, scientists and universities. Both within FrieslandCampina and outside our company, Kievit uses its knowledge to come up with either new ingredients or process technology innovations.

We recently launched new ingredients and applications in the beverage, bakery and savory markets, including a new foamer portfolio for SEAP, cold coffee solutions in EMEA, and dairy and plant-based fat powders in the bakery and savory segments.

foodHQ: What can you tell us about latest trends in functional solutions?

Weinbreck: At FrieslandCampina Kievit, we focus on two key development areas in instant: health and functionality. We see ‘health’ as a very broad area, including healthier solutions for consumers, but also healthier for our planet and people. Under this umbrella, we include innovations in the area of sustainability, better nutritional value, and ethical production aspects. As part of FrieslandCampina, we strongly believe in a more sustainable offering. The functionality area includes innovations to give the end-consumers a more indulgent food and drink experience.

With respect to functional solutions in coffee and tea, we see that foaming drinks are on the rise. Different aspects contribute to the sensorial experience of the consumer: thick foam, the ‘spoonability’ of the foam, the mouthfeel,

the color and the foam's stability. This goes both for the instant sachets as for the single serve capsules. Especially in single serve, powder properties make the difference in creating the perfect consumer experience.

In the pastry and desserts market, we see that a buttery taste and mouthfeel are growing at a double-digit rate. Especially European consumers prefer a buttery taste and full mouthfeel. Furthermore, an authentic product and clean label are very important for consumers in this market. We therefore launched a portfolio with the butter-based Vana-Lata BB75B and the cream-based Vana-Lata CB72B for refreshing applications.

We regularly publish trends and recipe booklets, and recently published a bakery trend booklet highlighting the main trends for 2019.

foodHQ: How do you describe this segment's growth?

Weinbreck: Moments of feeling good matter to everyone, especially in our hectic, busy lives. Healthier moments are clearly a growth market. With information being more readily available, particularly on a plethora of apps on mobile devices, consumers can make better informed choices about the food and beverages they consume. We do see different growth in different segments, with some subsegments growing at a faster pace than others. For example, worldwide coffee consumption is growing at a rate of over 4 percent (CAGR 2017-2022). But within that segment, it is indulgent coffees like cappuccino and lattes that show the highest growth rates.

foodHQ: How do you evaluate your presence in the MENA market?

Weinbreck: FrieslandCampina Kievit has a presence in all continents, including the MENA market, which is an important region for us. In both the beverage and food markets, we see a huge globalization trend. In practice, this means that we bring new tastes to countries like Turkey and Egypt. Recently we launched a new creamer in these markets, offering pure delight from a 3-in-1 sachet: a delicious cappuccino, a warm chocolate medley and an inspiration Matcha Latte.

In the pastry and decoration segments, we developed a whipping agent specifically for the MENA region. It is a high-performance powder whipping agent for superb firmness and lasting stability at ambient temperature, called Vana®-Monte DP570. The new powder whipping agent represents an attractive alternative to current toppings in the market. In the competitive bakery market, presentation is key. Vana®-Monte DP570 is very simple to apply, using a baker's knife to top and fill cakes and

bakes. The result is a cake with a smooth appearance and beautiful, clean and sharp edges for the swirls. But its key benefit is that the toppings retain their supreme firmness and stability, enabling bakers to create attractive displays to tempt consumers. Collapsing creams and watery whipped toppings belong to the past now. In addition to its excellent decoration properties and firmness, Vana®-Monte DP570 promises a superb clean taste profile and a full body and warm mouthfeel, scoring high marks on creaminess. It also has good acid stability and solubility, delivers fast aeration, and is Halal and Kosher-certified.

Vana®-Monte DP570 opens new doors as an alternative to liquid toppings and in combination with liquid toppings. As a powder solution, Vana®-Monte DP570 has a long shelf life and can be stored at ambient temperature – a big plus in warmer climates.

In the coming period, the region will most certainly hear from us again.

foodHQ: What are the major factors that make you so confident in your company's performance?

Weinbreck: Aside from our constantly updated knowledge of trends, our in-house pool of sensory experts operating across the world, unrivalled application expertise from R&D and TSS teams, strong capability in R&D, an open innovation approach and a good network of food technologists, chefs, and food scientists, the most important key success factor for us is the close partnership with our customers.

If we're not working together and do not support our customers with their specific demands, we cannot be successful. Cooperation can have many forms, but one of the Kievit ways is to innovate together in our innovation kitchens. All around the world, we have innovation kitchens, such as in Shanghai and Manila. In these innovation kitchens, we involve our customers directly with experts from different departments, such as R&D, marketing and sales. This setting enables us to co-create with our customers, side-by-side, literally sitting together in one space, to create the best possible solutions.

By actively engaging with customers and consumers in different regions, we are on top of local trends and can leverage these quickly in other countries when relevant.

foodHQ: What are the company's projects for 2019?

Weinbreck: FrieslandCampina Kievit is innovating in different development areas: clean label, sustainability, foam and other functionalities. In these areas, our customers and the market can expect new ingredients and applications to surprise end-consumers.

Take Your Product to Premium with Branding & Searing Systems



 The Rotary Brander

Perfect grill marks on a steak are a treat for the eyes as well as the palate. Branding and searing food enhances not only the appearance but also the flavor and aroma of the chosen product. If you've ever cooked a piece of steak or fish, you'll know getting a good sear helps food release from the grill naturally. Searing also sears in the juices.

Love your meat char grilled? That dark brown crust is what imparts flavor and is as a result of changes in the chemistry of the meat. Known as the Maillard reaction, this caramelization or browning occurs when heat changes the structure of amino acids, proteins and sugars. The result is you get to feast your eyes and then your taste buds.

The application of grill marks or a combination sear/grill finish is one way that processors can differentiate their product as one that has a genuine char-grilled finish and flavor. Adding branded grill marks, seared char-grilled accents or browned surfaces is also a way to take your product to a premium level.

The **Heat and Control** range of quality branders and searers gives food producers the control they need for surface enhancement when preparing and cooking the highest quality prepared food. Precise control allows different finishes by the number of burners used and by adjusting the individual angle and height of each burner. Variable conveyor speed controls exposure time. Our branding and searing systems are part of the full

line solutions Heat and Control offer to further process and value add to your products. Brander, Searers or a combination of both apply appetizing grill marks to one or both sides of formed and natural meat, poultry, seafood, vegetables, panini and other prepared foods.

Consumers are hungry for prepared foods with authentic barbecue flavors and textures, and our continuous Rotary Brander delivers a genuine char grilled finish with outstanding visual appeal.

Rotary Brander

Our Rotary Brander includes a variable speed conveyor, belt rinse system for easier clean-up, and self-contained combustion and control systems. Operating and combustion controls are fully pre-piped and wired to reduce installation time and costs. Remote control panels, as well as roll-away units on casters for more production flexibility, are available to suit your particular plant requirements.

The Rotary Brander will continuously brand grill marks on meats, poultry, seafood, vegetables and bread for an appetizing just grilled finish. Brand can be applied to top, bottom, or both sides and can include custom markings such as diamonds. The Floating Ring top wheel conforms to variations in product thickness such as chicken breast fillets. Control over branding color is easily adjustable with the ability to adjust branding depth and speed to suit product requirements.

HORECA Lebanon Returns with New Highlights



Horeca 2018

As a key business meeting place for the hospitality and foodservice sectors, the event is set to welcome 18,000 industry professionals and more than 350 local and international exhibitors from France, Italy, Turkey, Greece, the Netherlands, UAE, Egypt, Syria, Jordan and Korea. Visitors will have the opportunity to explore the products and services of over 2,500 brands during the four-day event.

“Our slogan for this year is ‘For a Better Industry’ as this sums up our objective; to be a regional business meeting place where we can shape the future of the hospitality and foodservice sectors in Lebanon and the Middle East,” says *Joumana Dammous-Salame*, managing director of Hospitality Services, the event organizer. “We are determined to make the 26th edition an exceptional one and show how robust these sectors are despite the regional circumstances.”

Over 60 international experts from the world of food, drink and hospitality will attend the 2019 show to conduct demonstrations and judge a number of competitions such as the renowned Hospitality Salon Culinaire, the Junior Chef Competition, Atelier Gourmand, the Lebanese Bartenders Competition, the Lebanese Barista Competition, the Art of Service Competition and the Bed Making Competition.

In addition to the regular features, new events taking place at the 26th edition include the Mocktail Competition and the Latte Art Competition. HORECA Lebanon will also host two special events to highlight Lebanese flavors: Al Matbakh, where well-known

Lebanese and international chefs will put their talents on display in a variety of cooking workshops to honor local food heritage, and the Arak Lab, giving the opportunity to local arak experts to share their expertise.

The Hospitality Salon Culinaire’s guest of honor is three-Michelin-starred chef Christophe Bacquie from Hôtel & Spa du Castellet, France. Other international guests at the salon include one-Michelin-starred chef Alan Geam (France), Christophe Marguin (France), Jean-Marc Mompach (France), Guillaume Gomez (France), Christophe Morel (Canada), Domenico Maggi (Italy), Georges Damianou (Cyprus), Francois Pozzoli (France), Samaan Hilal (Kuwait), Tarek Ibrahim (Australia), Thomas Gugler (KSA), Jacques Charrette (France), Mehmet Gok (Turkey) and Yasser Jad (KSA).

Elsewhere, the Lebanese Barista Competition and Latte Art Competition will be judged by international experts: Stavros Lamprinidis (Greece), Safa Salehi (Iran), Branislav Beronja (UAE) and Anthony Bedoyan (UAE), while the Lebanese Bartenders Competition and Mocktail Competition will be judged by: Andreas Tsanos (Spain) and Spyros Kerkyras (Greece). International guests at the Art of Service Competition include: Antoine Petrus (France) and Pascal Obrecht (France).

“Indeed, HORECA is recognized as a platform for trade visitors to network with peers, gain new insights and discover what is happening. We are looking forward to bringing together decision makers and international guests at more than 100 events as we celebrate our biggest edition to date,” says Dammous-Salame.

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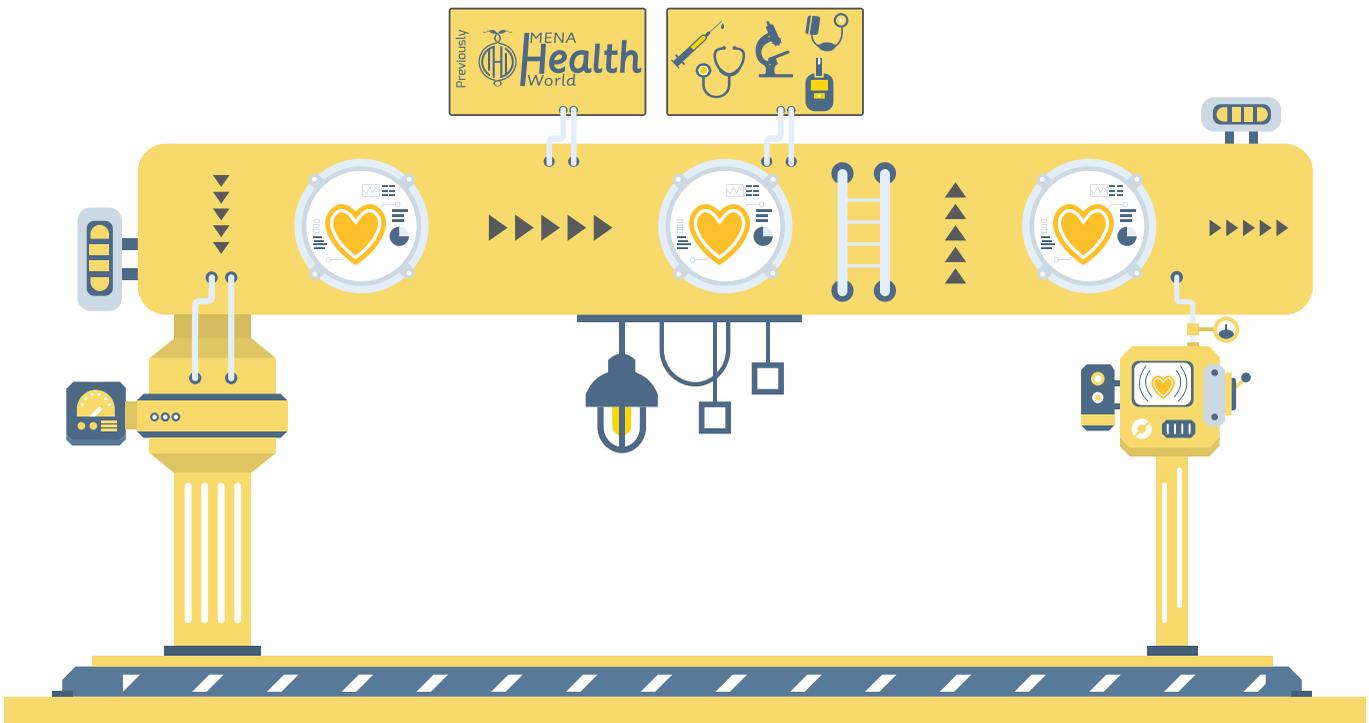
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Agents

For more information, please contact:

Mr. Jad Aboulhosn (Marketing & Sales Manager)

T: +961-1-748333 Ext: 191
marketing@cph.world

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Seven Marketing Trends for The Food Sector In 2019

John Saadie
Founder
Order Up!



New technology, diet consciousness and environmental concerns are shifting rapidly as we enter 2019. *John Saadie* advises food retailers on seven key trends to keep in mind going into the new year.

The food retail industry is a crowded and demanding market. With pop-ups, chains and boutique restaurants dominating every street corner, marketing has never been more important. Combine this with the changing face of advertising and 2019 is bound to be a year of new marketing trends. To make sure your food retail business is one step ahead of the game, it's time to get your head around these trends.

Think local

Consumers are more and more concerned about where their food comes from. This will have a major influence in the way food retailers market themselves. An emphasis on locality is set to become prevalent in the marketing material of 2019. Food retailers will choose to highlight locally sourced ingredients and locally tailored menu items. This could range from explicitly marketing this focus on locality to naming menu items after locally sourced ingredients ('Cowra Lamb Burger' etc).

Voice technology

Recently, one of the biggest changes to the way we shop has been the introduction of home voice assistants such as Alexa or Google Home. This opens up a whole new field of marketing for food retailers. This emerging technology requires serious thinking and strategizing but has huge potential for retailers. There are a few ways to implement this technology into your marketing plan; firstly, you can participate in apps which allow advertising on voice platforms – Spotify and Youtube are two easy examples of this. Alternatively, you could invest in leveraging directly off this technology. Think about delivery apps or value-adding programs – a cookbook or a game, for example – which you could design to help put your name on Alexa's lips!

Eco friendly

As food retailers market themselves in 2019, they need to keep in mind that consumers are now more environmentally concerned than ever before. From eco-friendly packaging to commitments to reduce food wastage and sustainable delivery methods – all of these efforts should be marketed widely to attract environmentally conscious customers. Even down to the color schemes (think green!) that retailers use, marketing should include an awareness of environmental needs. When you make positive changes to your policy in this area, don't miss out on a marketing opportunity. Recently changed to hybrid delivery vehicles? Tell it to the world!

Nutrition

Health has always been a concern for food retailers, but in 2019 this will shift to be a more specific focus on nutrition and wellbeing. Many food retailers have already jumped on this bandwagon, advertising a feel-good, health conscious message. In the next year, the need for this kind of marketing will only grow with more Australians paying attention to the effects of food on their well-being. This marketing will steer away from scientific, didactic calorie counting and toward positive affirmations of holistic health. Think carefully about the copywriting which surrounds your brand to ensure your language is on target with this trend.

Content marketing

Already, it is essential for food retailers to invest in high quality content marketing. In 2019, this will become increasingly important as consumers have less patience for blatant advertising and seek value-adding content instead. More food retailers will begin to think creatively about content marketing – from blogs and podcasts to recipe books –this is an exciting move in the marketing world and a rich area of growth in the food industry.

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