

THE GREAT FOOD GRIDLOCK IT'S THE CONSUMER, STUPID!

Conference report for the
3rd International Food Innovation Conference, June 21, 2023



«Don't sell food as fuel. Sell food as pleasure.»

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Professor für Marketing, INSEAD, S. 6

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can drive the change in the food
system: retail.»

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There's nothing good, unless you do it.

Sometimes there is a whiff of the unheard-of in the air at our conferences at the GDI. The completely new, the unprecedented is on the stage or in the room, and one can imagine how the world could turn in the next 50 years. This time it felt differently: The 3rd International Food Innovation Conference was more about the next five years – and more about how the new can actually gain a foothold in the world. Because even the best ideas can only have impact if they get from theory to practice and conquer the market, the shelf, the kitchen. «There's nothing good unless you do it,» says the German writer Erich Kästner.

This implementation problem came up several times using the example of plant-based products. Although this term can already represent part of the solution – because «vegan», «alternative» or «meat substitute» are words that keep the healthier, animal and climate-friendly products caged in the organic corner: small, fine, expensive. «It's about plant-based democratization,» Verena Wiederkehr from the Austrian retail chain Billa told us..

Stéphane Keulian from Ingka Centers, which operates almost all Ikea stores, showed another way of democratization. His «Saluhall» concept is a kind of translation of Eataly's foodstyle approach for the mass market, strongly adapted to the local traditions of each location. This can help to get wider audiences everywhere around the world excited about the social and ethical role of food. «Don't sell food as fuel, sell food as pleasure,» said our keynote speaker Pierre Chandon.

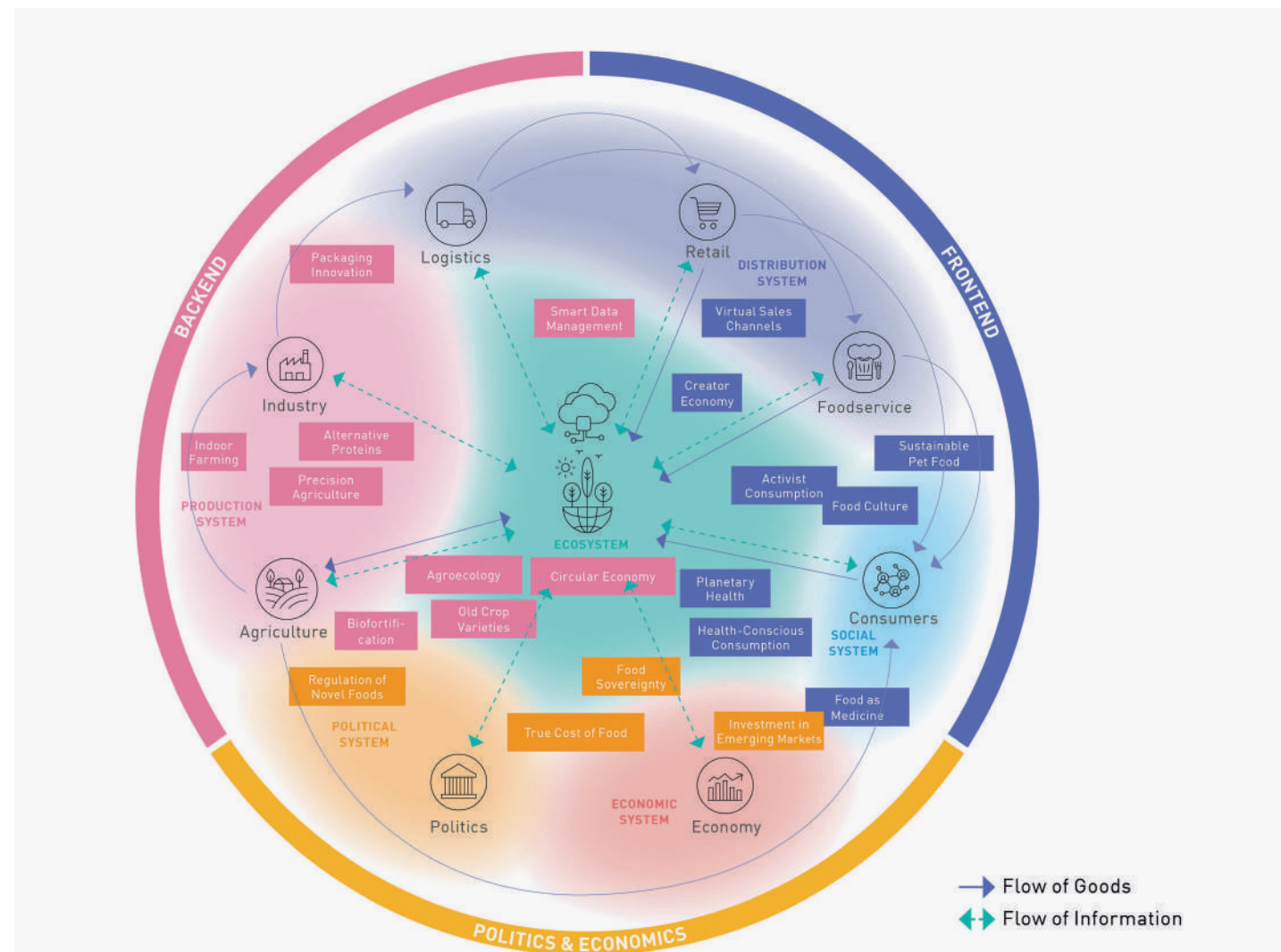
If you want to conquer the mass market, you have to be affordable. That was the case in Gottlieb Duttweiler's era, and it hasn't changed ever since. According to a survey presented by our researcher Christine Schäfer, 58 percent of the Swiss consumers would buy more healthy and sustainable food if the prices were lower. The corresponding challenged for manufacturers and retailers was clearly coined by the food strategist Cyrille Filott: «No one is asking about new products in the store. The focus is on the price.» It's about more sustainability at lower prices. Well then: There's nothing good unless you do it. ■

Dr. Johannes C. Bauer
Head of Think Tank and member of the Executive
Board, GDI Gottlieb Duttweiler Institute



GDI-Study

Sustainable food trends



Opportunities in the food system

The European Food Trends Report describes opportunities in the food system for three categories:

Frontend: new opportunities for consumers, retailers and restaurants.

Backend: Innovations in agriculture, industry, logistics and distribution.

Politics & Economics: Changes in the political framework; adaptation to economic and demographic trends. .

The GDI researches food and nutrition trends at all levels of the value chain. How will food be produced and processed in the future? How will it be transported and distributed? How will retail and gastronomy change? How, when, where, with whom and what will people want to eat in the future? Our recently published European Food Trends Report mainly tackles the question how and how fast these different areas of the food system are moving toward sustainability.

Food is essential for survival; it fills our bellies, brings us joy, and we are reliant on it. However, what and how we eat not only affects our health, but also the environment. The global food system is a major contributor to global warming, biodiversity loss and thus the destruction of the planet. How can we change this?

Companies and consumers are still acting rather hesitantly and uncoordinatedly. Nevertheless, the transformation of the food system has already begun. Consumers are beginning to rethink their consumption. Industry, logistics, retail and research are developing new solutions for a diet that does not come at the expense of the planet.

The GDI's European Food Trends Report shows in detail the status and prospects of this transformation. By employing methods of agro-ecology and precision agriculture, farmers can produce in a more resource-efficient way. Smart data enables more efficient logistics. New virtual distribution channels and a vibrant creator economy – which includes food bloggers, influencers and online chefs – are shaking up the industry and are able to bring important issues to consumers' attention. By using packaging that is recyclable or biodegradable, the processing industry is able to reduce its ecological footprint. Meanwhile, researchers have long since explored

alternative protein sources based on cells or fermentation, the production of which generates fewer greenhouse gas emissions compared with conventional meat production. Those who recognize these opportunities first and move forward will be among the winners tomorrow.

But that takes courage - and time. The food system has reached a level of complexity that is difficult to navigate and cannot be controlled by individual actors. In a representative survey, the GDI examined the willingness to transform of the theoretically most powerful actor in the system: consumers. What prevents them from switching to sustainable consumption? The results show that consumers often find that products are too expensive, difficult to recognise as sustainable, not available everywhere, and limited in range. Consumers themselves cannot eliminate all these obstacles. It is up to the players in production, retail and politics to take action. They have the power to accelerate the transformation of the food system. ■



European Food Trends Report

Feeding the Future – Opportunities for a sustainable food system

By Christine Schäfer, Karin Frick and Johannes C. Bauer

[free download](#)

Consumer Behavior

Food is not fuel. Food is pleasure.

There is an opportunity for the entire food system of industry, retail and gastronomy to develop a healthier and more sustainable attitude toward food. For this to happen, food would have to be understood and marketed not as a source of energy, but as a source of pleasure.

If we want to get people to eat healthier, more sustainable, better, we have three options: cognitive nudges, or better information; affective nudges, or better feelings; and behavioral nudges, or better portion design.

Information alone doesn't lead to better nutrition. Even if you add to the information also a better availability of healthier foods, you achieve

an average effect of only 70 calories less per day – you barely move the needle. Going from description to prescription (with recommendations and color coding), you still don't get far. Cognitive nudges assume nutrition is a knowing problem. It isn't. People who eat unhealthy products like ice cream or fast food usually know they are unhealthy and eat them anyway.

The problem with healthy eating is not knowledge, but action. Affective nudges are about combining good food with good feelings. Words play an important role in this. In one experiment in U.S. university cafeterias, plain green beans were touted as «Sizzling Szechuan Green Beans,» and demand for them increased by 14

Pierre Chandon was himself involved in the introduction of a Nutriscore system. Since then, he knows that it doesn't work.



Pierre Chandon
Professor of Marketing, Innovation and Creativity, INSEAD,
Director of INSEAD-Sorbonne University Behavioural Lab
[Website](#)



Chandon's inspiration for food marketing in the 21st century can be traced back to a 2300-year-old philosophy.

percent. In another experiment in the cafeteria of the Bocuse Institute in Lyon, the control menu had a plain description, while the «epicurean» version was written poetically. In this case, the guests ate less, but rated the food higher. The essential difference: With the epicurean menu, most guests put away their smartphones, concentrated on the food, and ate more slowly.

However, behavioral nudges are most effective, and in particular portion size. Unfortunately, food companies mostly still behave as if they were in the energy business. You make money by selling more calories to more people for more money. They create incentives based on sheer volume. At the same time, we as consumers have much stronger preferences for what we eat than for how much we eat. And we are strongly oriented toward the so-called numerosity heuristic – we estimate size based on numbers. We think the contents of four small glasses are bigger, even if there's more wine in the big glass than in the four small ones combined. And a pizza cut into pieces looks bigger than the uncut one.

«The wise person doesn't choose the largest amount of food, but the most pleasing,» said the

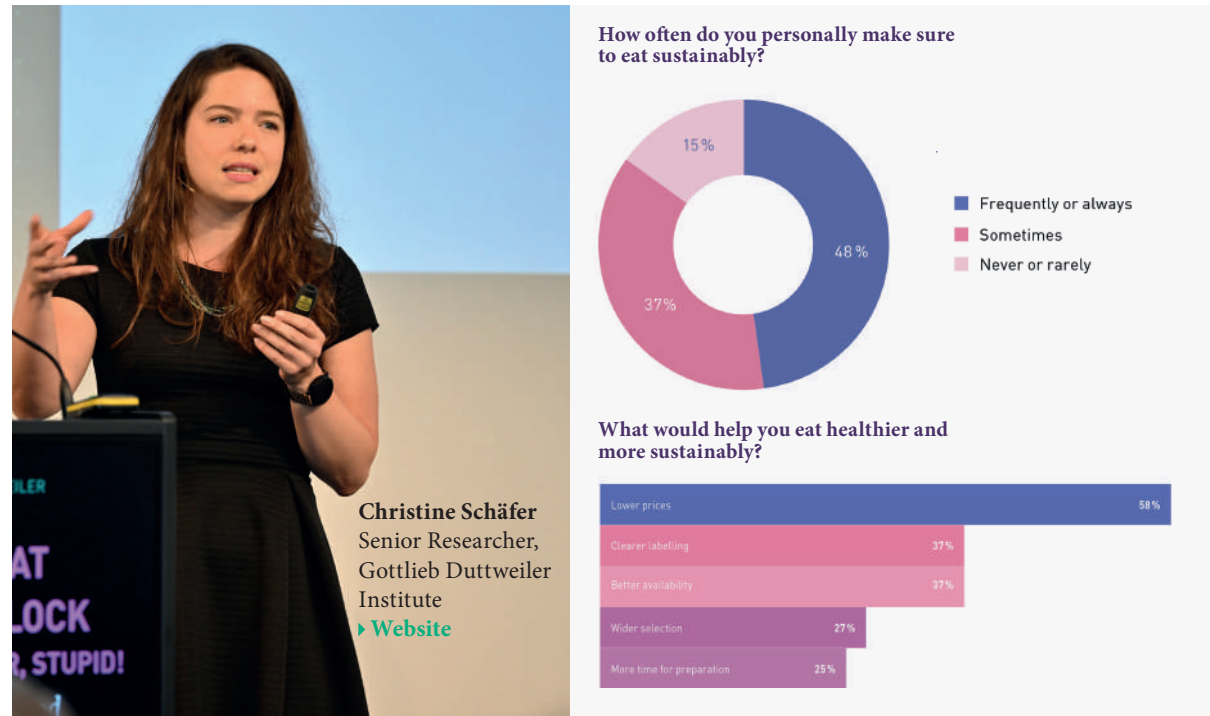
Greek philosopher Epicurus. We should follow him and stop treating food like fuel: Make more money, do better business, by selling less food but offering more pleasure. ■

Takeaways

- ▶ **Information** hardly changes eating behavior. We know what would be healthy, but we don't eat it.
- ▶ **Pleasure** arises when good food can be combined with good feelings.
- ▶ **Size** should no longer be a selling proposition for food. Less is actually more.

Sustainability

Retailers to the rescue



The biggest obstacles that prevent Swiss consumers from eating more sustainably cannot be overcome by them. One player in particular can drive change in the food system: retailers.

According to the representative GDI survey, more Swiss consumers pay attention to a healthy diet (76%) than to a sustainable diet (48%). There is also a lack of food literacy: only 17% of respondents were able to answer all five questions on sustainable nutrition correctly. Nevertheless: A large part of the Swiss population would like to eat more sustainably.

What keeps them from doing so? The high price is the biggest hurdle to healthy and sustainable nutrition – cited by 58% of the respondents. The next three hurdles (labeling, availability, choice) are also systemic ones: Consumers cannot over-

come them for themselves; they are dependent on the other players. This is where retail comes into play. It has a strong lever and can accelerate the change in consumers' behavior. ■

Takeaways

- **Knowledge** about sustainable nutrition is expandable.
- **One in two** is interested in sustainable nutrition.
- **The obstacle** most frequently cited are high prices.

Social Media

On Instagram, food is tasty for your eyes only



Pixie Turner: «We never see people eating on Instagram. We only see the food.»

Social media can prioritize aesthetics over taste and encourage unhealthy behaviors, but it can also foster a sense of familiarity with new products and ideas, and do so more effectively than traditional advertising.

Instagram has given a boost to healthy food. Because it is a picture-first platform, and for a picture of food, it doesn't matter how it tastes, but if it looks nicely. And that's what vegetables and fruit do. However, the exact opposite has also re-

ceived a social media boost: lavish gluttony, hashtag #foodporn.

92 percent of consumers trust the recommendations of people they follow on social media. Celebrities have less influence – they live on a different planet. Influencers, on the other hand, are just like us, and thus credible. This makes them better able than traditional advertising to drive consumer choice and behavior in a positive or negative direction. ■

Takeaways

- **Taste** doesn't matter when it comes to food on social media. It's all about the look.
- **Healthy food** may have an advantage. After all, what would look better than fruit or vegetables?
- **Influencers** are the most efficient way to change consumer behavior via social media.

New food solutions

New products, new devices and new processes are different ways to drive the change in the food system – and startups are one of the best drivers for this. Israel is one of the global food-tech hotspots, so for the International Food Innovation Conference we invited three Israeli startups to present their solutions.

Takeaways

- ▶ **Convenience** plus sustainability can accelerate change in the food system.
- ▶ **Freshness** through in-house production can be attractive to green target groups.
- ▶ **Efficiency** through industrialization is a key argument for urban farming.



Upcycling

Anina is a 100 percent plant-based ready meal. Even the packaging is purely plant-based: It consists of vegetable laminate – for example, pumpkin or zucchini –, which become part of the meal during preparation.

The product is a 80 gram capsule, completely dry, recycled from food waste. Water is added for preparation. Heated in the microwave, Anina transforms into a 300-gram meal in a few minutes.

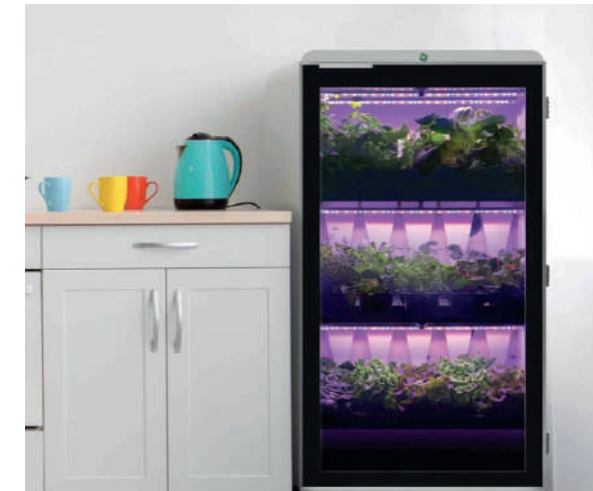
For the food industry, the Anina story is about upcycling. For the consumer, it's about something else – namely taste and convenience without the need to compromise.

The more radically you want to change behavior, the more time it takes, and the harder it gets. Anina minimizes the barriers to putting sustainable innovation into practice. ■



Anat Natan
CEO and co-founder, Anina

▶ [Website](#)



Kitchen farm

Agwa's vision is to move crop production from the farm directly into the kitchen. That's what the first AI-controlled household greenhouse was developed for. Salad or vegetables can be picked immediately before preparation, so they are unbeatably fresh. The products of the kitchen farm are available year-round, require no pesticides and have a small carbon footprint.

Artificial intelligence acts as a virtual agronomist by translating data from a wide variety of sources into plant growth adapted to the individual situation. The consumption of the household is also taken into account.

In Israel, the first 250 pilot units are in use. The price of about \$1,000 plus a \$30 subscription per month for the seed pods reaches a level comparable to the cost of vegetable purchases at organically positioned retailers such as WholeFoods. ■



Alon Wallach
CEO, Agwa

▶ [Website](#)



Plant factory

8 out of 10 people in the U.S. and Europe are at risk of phytonutrient deficiencies. Green Onyx aims to address this shortage through efficient urban farming. Agriculture is transformed into industrial production.

The first pilot farm was built in a 300 square meters flat on the 5th floor of a commercial building in Tel Aviv. Ten production modules are operating in that plant in a sterile environment. Each module can produce four tons of crops per year. This adds up to a harvest volume of 40 tons of vegetables per year or 130 kilograms per square meter.

The first product are water lentils from the duckweed family. They are an excellent source of phytonutrients and a traditional food in Southeast Asia. It is well suited for trade and gastronomy, but also for use in space. First experiments there are about to start soon. ■



Tsipi Shoham
Co-founder and CEO, GreenOnyx

▶ [Website](#)

Health

How a wrong diet goes to our heads

Our diet not only affects our body, but also our mind. The close chemical connection between the gut and the brain can also lead to mental illnesses if we eat the wrong food for a long time. The best therapy against this is a behavioral change. The dietary recommendations should fit to the constitution of the person concerned and should also be feasible for him or her.

Poor nutrition is the main reason for poor health worldwide. This is well known. But no one talks about the connection between nutrition and mental health – between the gut and the brain.

The gut and the brain arise from exactly the same cells in the embryo and only separate in the further

course of pregnancy. Even after birth, throughout life, these two organs are constantly communicating, sending each other chemical messages.

One among the many functions performed by the trillions of microbes in our gut is our mental well-being. Dysbiosis, an imbalance of the intestinal flora, and inflammation of the gut have been linked to the development of several mental illnesses, including anxiety and depression. It is not so much about the consequences of a single unhealthy meal, but about permanent malnutrition. When we eat food, microbes do react within hours. But degeneration of the microbiome takes time. So one ice cream at your birthday is not a problem – but ice cream every day is.



The «more is better» recipe does not apply to changing eating habits. Giving people a list of ten or more recommendations won't work. Better to give them one behavior change that is feasible. And it's not the same recommendation for everyone: For example, it's usually true that eating more fermented foods can improve your microbiome – but that doesn't apply to people who already suffer from gastrointestinal problems.

Many people associate healthy food with bland taste. They have a point, but this impression can be changed, for example with spices. Many of them also have positive health effects, such as black pepper, ginger or oregano. ■

Takeaways

- ▶ **The head co-eats:** due to the intensive communication between gut and brain.
- ▶ **The head co-suffers:** Improper nutrition can also lead to mental illness.
- ▶ **The head must be willing:** Recommendations for changing eating behavior must also be implementable.

SOME FUNCTIONS OF HEALTHY GUT BACTERIA INCLUDE

1. Break down of complex carbohydrates
2. Produce vitamins and nutrients
3. Produce short chain fatty acids (SCFA)
4. Protect against pathogens
5. Help train the immune system
6. Support detoxification
7. Modulate the nervous system



Personalized nutrition



Kate Bermingham
Lead Academic
Scientist ZOE, UK
► [Website](#)

Kate Bermingham: The quality of your sleep affects your blood sugar levels. So you could adjust your breakfast to your sleep..

Every person is different, eats differently and makes different nutritional decisions. Recommendations for a healthy diet should therefore be correspondingly individual. But they are not. Not yet: Big Data and the collection of biodata with smart devices are paving the way for personalized nutrition.

To be able to give reliable advice on good nutrition and a healthy lifestyle, we need large amounts of data that can be individualized as accurately as possible. This is now possible for the first time – by collecting data streams from remote devices such as smartwatches. They pave the way from general advice to group recommendations (for certain age groups, for example) and finally to personalized advice.

One example is the «PREDICT» study, a remote randomized trial with 100,000 participants. The ZOE Health Study is a longitudinal cohort of one million active users, with whom diet and health were jointly assessed and lifestyle interventions are discovered that work in practice.

Personalized nutrition is a rapidly growing market, currently worth between \$6 billion and \$18 billion. Whether we like it or not, it is coming. ■

Takeaways

- **Data:** anonymized for studies, but to be used individualized.
- **Recommendations:** personalized down to the appropriate breakfast for today's quality of sleep.
- **Market:** currently with a global size of \$6 to \$18 billion, but growing strongly.

Would you eat it?

An apple is an apple is an apple. But even if every apple is edible in theory, that doesn't make it food in practice. It only becomes so through the decision of a particular person to eat that particular apple. What appears to us as an objective feature of a product is based on our subjective decision.

What is food? A tomato – for sure. A tomato in the trash – if it's still good, why not? A rotten tomato in the trash – hardly. Herbs, yes – but if they grow on the sidewalk? A cutlet, yes – but a dog puppy, no. The difference is not in what we look at: These are all organic substances. The difference lies in us, the observers: We make it food or non-food, delicious or disgusting.

Food only becomes food when you put it in your mouth. Even an apple growing in a ravine somewhere is not food – it is the fruit of a plant. An immense amount of design effort goes into selling us substances as food; supermarkets are virtually design museums. But we decide what we put in our mouths, what is food.



Solely in terms of substance, this could be food..

This means that food is never objective because we are not objective. We will always be subjective when we eat something. And we can decide completely differently today than tomorrow: When you're a little hungry, everything just tastes a little better. ■

Takeaways

- **Nutrients** do not make food – see the dog puppy.
- **Being marketed** does not make food – see the rotten tomato.
- **Consumption** makes something food – and that is a purely subjective decision.



Marije Vogelzang
Founder Dutch Institute of Food and Design
► [Website](#)

Business

Innovation? Price!



Cyrille Filott
Global Strategist
for Food, Rabo-
bank
► [Website](#)

Cyrille Filott: «Those in home offices eat at home. What does that do to food service at office locations?»

Covid, inflation, Ukraine, interest rates all have brought stress to the food system. Producers and retailers focus on the problems of the present – price is more important than innovation.

In the food system, 2015 to 2021 were years of startups. Small, new brands gained market share, and even the big food companies launched their own venture capital funds.

After that, the world changed: Covid, inflation, Ukraine, interest rates have brought stress to the

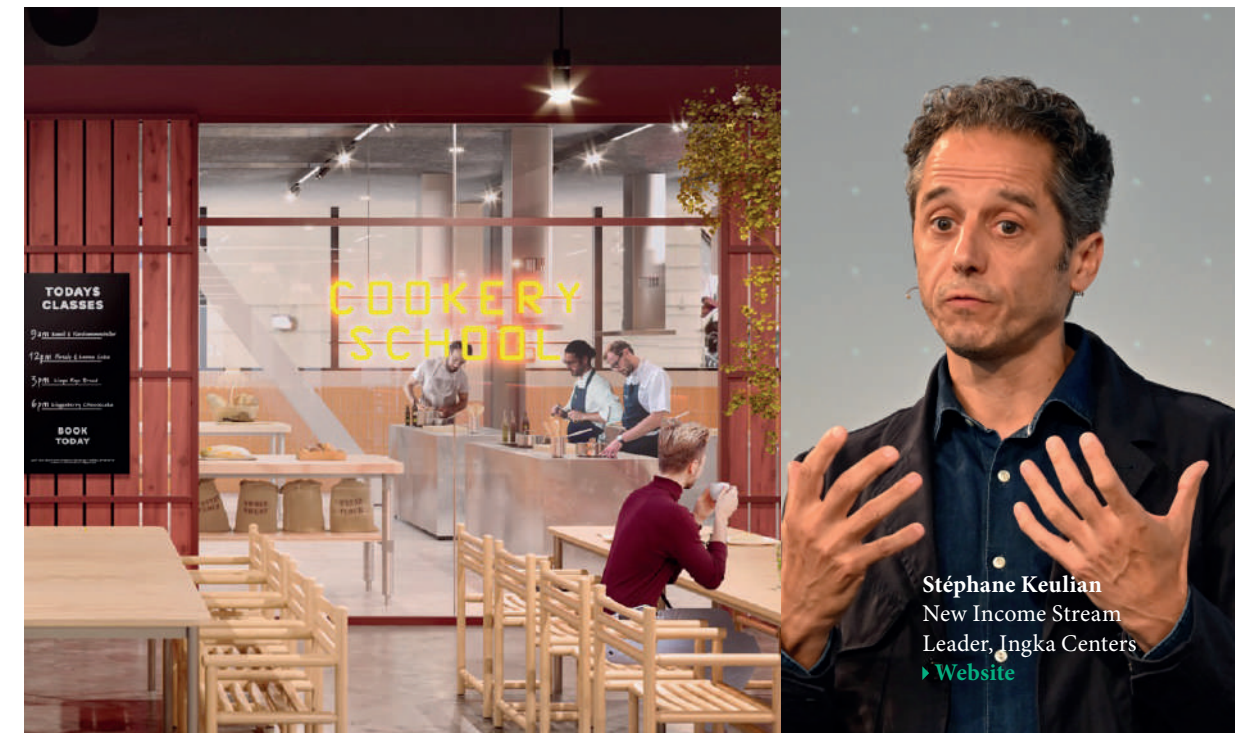
system, and it's not over yet. One systemic response is downtrading: fewer Michelin stars, more McDonald's. Another is the focus on price. No one asks for new products in the store – the price is the focus, nothing else.

Sustainability may hardly be an issue at the moment, but that will soon change again. After all, many companies have made voluntary climate commitments for the year 2030. By 2026 at the latest, it will become clear what still needs to be done to achieve zero carbon. ■

Takeaways

- **Innovations** must be price-competitive. All other arguments hardly count at present.

- **Sustainability** is not a priority investment issue given the stress in the food system. The closer we get to the climate target year 2030, the more important it becomes again.



As yet, the IKEA Saluhall exists only as an illustration. The first of these restaurants are to open in California, China and India..

IKEA goes Eataly

The Saluhall concept aims to bring plant-based sustainability and cooking lessons into the halls of IKEA furniture stores.

The Saluhall concept is inspired by the New Nordic Cuisine manifesto, which promoted «purity, simplicity and freshness» in 2004. For implementation in IKEA locations, we developed the 80/60/40/0 formula: 80% plant-based, 60% local, 40% Nordic, 0% food waste and single-use plastic.

The offer is mainly grain-based, from bread and sandwiches to pizza and cakes. All offered burgers will also be 100% meat-free. Also included in the Saluhall concept is a cooking school to connect the location more closely with the local community.

It's no coincidence that the Saluhall concept sounds so similar to Eataly. In the beginning we thought about it exactly that way: Can't we just

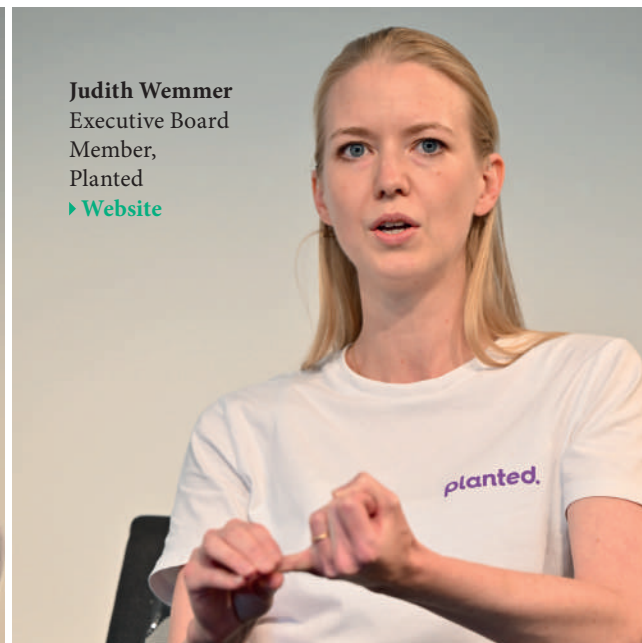
do a Scandinavian version of Eataly? But while Eataly celebrates Italian cuisine and lifestyle everywhere in the world, the Scandinavian origin plays a much smaller role at Saluhall: We are more concerned with integrating local characteristics and specialties at each location. ■

Takeaways

- **Nordic** is the inspiration for Saluhall, and 40% of the menu.
- **Plant-based** is 80% of the offering, and 100% of the burgers.
- **Local** should be 60% of the Saluhall supply.



Ralph Langholz
Head of Alternative Protein sources,
Micarna
► [Website](#)



Judith Wemmer
Executive Board
Member,
Planted
► [Website](#)



Verena Wiederkehr
Head of Plant-Based
Business Development, Billa
► [Website](#)

Plant-based democratization

One of the most important sustainability innovations in the food industry are plant-based alternatives to meat and dairy products. But not all new launches are successful. Three industry representatives discuss strategies and experiences on our conference stage.

Ralph Langholz explores and develops the alternative protein business for Swiss meat processor Micarna.

Our original approach was to take products out of meat and offer them in purely plant-based form. This also has a convenience aspect for the customers: They can prepare the new products just like sausages or chicken nuggets. With the plant-based V- Love brand, Migros is now going far beyond that.

On the shelf, price and taste play the most important role, but with novel foods, socialization also plays a role. We noticed this, for example, with insect products: We did not get to the sales volumes we had expected, and so we left the market after three years.

Of the so-called «superfoods,» only quinoa seems to be catching on so far. An older success story is sushi. It was also a novel food 30 years ago – who had eaten raw fish before? Today, it's available in every supermarket.

Judith Wemmer is responsible for product development, regulatory and IP at Planted, a Swiss alternative protein start-up.

Novel food is usually associated with a technology, but this is extremely unimportant for the customer. What is important is the story behind the product, the taste, and the availability.

With plant-based products, you also have to change or at least rethink your eating habits. In addition, the price of novel food is usually higher – which is also a barrier to market entry. It must be possible to offer plant-based proteins at a lower price than animal proteins, otherwise consumers will not switch.

This works primarily through efficiency, automation and process optimization. Since our

company started, we have reduced our production costs by 80 percent, and we are continuing on this path.

Verena Wiederkehr is Head of Plant-Based Business Development at the leading Austrian retail chain Billa.

There is a relatively large amount of scorched earth in society when it comes to vegan products – they simply didn't taste good a few years ago. We shake that off in our communication by no longer talking about vegan products, but about plant-based ones instead.

Meanwhile, these products have a new, much better quality. We noticed this when we tasted 3000 plant-based products last autumn to refresh our product range. It's important to us that the new products are tasty for everyone, not just for vegetarians or vegans. That's why we have placed some of them also on the meat shelf, and when there are discount promotions for meat, they also apply to plant-based variants. It's about plant-based democratization. ■

Takeaways

- **Habit** Novel Foods rarely catch on.
- **Price** Plant-based proteins must become cheaper than animal-based ones.
- **Taste** Plant-based alternatives have recently improved extremely in terms of taste.

Networking talks



Innovative Food in Practice Test: The networking Apéro was hosted by the Soil to Soul organization.

Food for Thought at the Food Innovation Conference: The innovations presented on stage could be tested during the breaks, and other food pioneers such as the fermentation startup Yumame also enriched the menu. The participants visibly enjoyed the suggestions. ■

Photos Sandra Blaser, names from left to right



Lucie Rein (Cultivated Biosciences SA),
Lucie Kendall (M-Industrie AG)



Pixie Turner (The Food Therapy Centre Ltd.),
Eliana Zamprogna (Yumame Foods AG)



Rolf Hiltl (Hiltl AG), Orit Ronen (Orit Ronen GmbH)



Bärbel Ulrich and Marlene Jonas (dm drogerie markt GmbH + Co. KG)



Moritz Merz (Even GmbH)



Teun Bevers (Salud Foodgroup Europe B.V), Saskia Harthoorn (Niederländische Botschaft), Ruud Meijer (Salud Foodgroup Europe B.V), Cyrille Filott (Rabobank International), Marije Vogelzang (Dutch Institute for Food and Design), Laura de Wolf (GDI)



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Denise Spirig und Bettina Hasler (Zweifel Pomy-Chips AG)

Christine Schäfer (GDI), Stephan Zacke (Avina Stiftung), Priscilla Laube (ALLSUPPS)

Dorrit Türck and Lauren Wildbolz (Future Cuisine GmbH), Sandra Sulzer (Swiss Food Research),
Susanne Miescher Schwenninger and Sandra Mischler (ZHAW), Patrick Jungi (Hiltl AG)



Save the Dates

September 7/8, 2023

73rd International
Retail Summit

March 14, 2024

20th European
Trend Day

June 19, 2024

4th International Food
Innovation Conference

Information and registration:

► gdi.ch/en/events/conferences



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