

December 2018

Cooking Sauces and Pasta Sauces - UK

“The popularity of making sauces from scratch and the growth of own-label continue to chip away at value sales in the market. Addressing consumers’ concerns around sugar, salt and artificial ingredients will be key to turning the tide. Exploring the sauce kit format could help boost associations with healthiness and ...

Free-from Foods - UK

“Concerns around the environment and animal ethics are giving dairy-free food and drink a boost, with the multidimensional appeal of these products boding well for the longevity of the dairy-free segment. Meanwhile, more clarity is needed to help shoppers easily identify which allergens products are free from. This should help ...

November 2018

Supermarkets - UK

“The supermarket sector is growing once more, but this growth has not been enough to stem the tide of spending moving away from large-format stores. This decade has seen unprecedented change in both how grocery shoppers behave and how the sector is structured. Consolidation, on both the retail and supply ...

Kids' Snacking - UK

“That efforts to limit the amount of snacks children eat are near universal and parents are switched onto the importance of snacks being healthy is welcome news for PHE and indicates that the industry’s efforts to improve the healthiness of their products will appeal. Healthier versions of popular children’s snacks ...

Processed Poultry and Red Meat Main Meal Components - UK

The Leisure Outlook - Quarterly Update - UK

“The leisure industry continues to benefit from consumer drive towards experiences. As winter temperatures settle in, consumers are turning to indoor activities, especially visiting museums and art galleries. While pubs and nightclubs remain key to the night economy, operators need to find ways of holding up demand as consumers are ...

Consumers and the Economic Outlook - Quarterly Update - UK

“Financial well-being and confidence was lower in each of the three months to October than we reported throughout the summer months. This matches the stagnant economic performance in August and September. Overall though, most consumers are still getting by, and remain relatively optimistic about their financial future.”

– Rich ...

Ice Cream - UK

“The scorching 2018 summer has been a boon to the ice cream market, fuelling sales growth at a time when cost pressures are putting a squeeze on operators. Lower-calorie ice cream brands have caused a stir in 2018, building up a not insignificant market penetration. While the lower-calorie proposition has ...

“Health and environmental concerns have prompted many people to cut back on processed meat. However, premium products can tap into the widespread ‘less but better’ mindset to support value growth. Meanwhile eco-friendly packaging and carbon offset guarantees are promising means for companies to demonstrate their environmental commitments.”

– Alice ...

October 2018

Unprocessed Poultry and Red Meat - UK

"Openness to recipe suggestions probably offers the simplest way to encourage consumers to experiment with different types of meat to widen their repertoire. This would also tap into their love of cooking and willingness to try something new. Recipe suggestions could also help to drive awareness of cheaper cuts, breaking ...

Cheese - UK

“Strong interest in purchasing cheese from local producers in supermarkets creates scope for the grocers to tap into the allure of specialist cheese shops, while leveraging the overarching interest in buying British produce. Meanwhile, the trend towards reducing meat consumption presents an opportunity for the market to encourage more frequent ...

September 2018

Food and Non-food Discounters - UK

“Overall the discount sector remains one of UK retail’s key growth areas. However, it is increasingly becoming a tale of two sides. The food discounters continue to put on exceptional growth, helped by store openings and the success of newer ranges such as premium. On the non-food side growth continues ...

The Private Label Food Consumer - UK

“Despite facing undeniable – and significant – headwinds, it is by no means all doom and gloom for brands. Nurturing perceptions of offering the ultimate in enjoyment, a unique taste, superior quality, and exciting flavours will be key to promoting brand loyalty. That brands are still seen to have the ...

Bread - UK

“That only a minority of consumers care about good value for most occasions when they eat bread reflects the relatively small role of bread in the overall food budget. This shows the scope for operators in this market to compete on factors other than price, exploring added value attributes to ...

Meat-free Foods - UK

“The UK’s overarching health trend and the focus on the environmental impacts of meat production have underpinned strong growth in the meat-free foods market. ‘Clean labels’ and greater clarity over the ingredients used are needed to build consumer trust, while innovative products targeting the ‘foodie’ consumer can inject more excitement ...

The Leisure Outlook - Quarterly Update - UK

“Consumers are reprioritising their leisure spending towards sharing experiences and habitual leisure activities, including frequent visits to pubs for drinks, working out in a gym and buying takeaways. Meanwhile, England’s success in the FIFA World Cup combined with the recent heatwave has helped boost the UK leisure economy.”

– ...

August 2018

Breakfast Cereals - UK

“Lack of excitement and busy lifestyles are barriers to people not eating breakfast cereals more often. More on-the-go formats should help cereals to stay on the menu among people who don’t have time to eat breakfast at home, while separate toppings are one way of adding more excitement to the ...

Pet Food - UK

“The desire to pamper pets has underpinned the continuous value sales growth in the market, with NPD often reflecting trends in the human food market. This bodes well for emerging pet food types such as high protein and plant-based. However, proving their worth, particularly in terms of their health credentials ...

Consumers and the Economic Outlook - Quarterly Update - UK

“Consumers continue to worry about the impact Brexit will have on the UK economy. But people are still focussing much more on their own financial situations, which are currently in a pretty healthy state. The base rate rise will make it harder for some, but the general outlook is positive ...

Pet Food & Pet Care Retailing - UK

“The pet food and pet care industry is growing well, underpinned by stable pet ownership and an increasing desire to treat pets with premium food, products and services as pets become a more integral part of the family. With the rise of services there is an opportunity for both specialist ...

July 2018

Breakfast Eating Habits - UK

“Breakfast habits are becoming more fragmented. Busy lifestyles are seeing people skip this important meal, eat it on the go or graze their way through the morning, fuelling demand for convenient products that can be eaten quickly and easily. Meanwhile, when time permits, brunch offers an attractive opportunity for people ...

Ready Meals and Ready-to-cook Foods - UK

“The influx of premium launches has underpinned the strong growth in the market, while NPD in healthy ready meals has also tapped into the overarching health trend.

Yogurt and Yogurt Drinks - UK

“Environmentally friendly products such as with recycled packaging or sustainable farming guarantees attract strong consumer interest but are underexplored within the category. The public focus on plastic’s impact on the environment makes such packaging innovation timely. Meanwhile sustainable farming guarantees allow companies to boost their image as socially responsible.”
...

Attitudes towards Cooking in the Home - UK

“People’s preference for cooking over prepared meals, and for meals which are quick and easy to prepare, fuels considerable demand for products offering shortcuts to

The return of salt to media headlines, however, will ramp up pressure on companies to try to reduce the salt content of products ...

preparing/cooking meals. Home cooks are also looking for more meal inspiration when doing their grocery shopping, and retailers can help here through offering more ...

June 2018

Consumers and the Economic Outlook - Quarterly Update - UK

“The increase in confidence that we discussed in Consumers and the Economic Outlook – UK – March 2018 clearly wasn’t a one-off. Our confidence data has been running for almost a decade now, and people’s assessments, both of their current financial situation and how they expect their finances to shape ...

Attitudes towards Sports Nutrition - UK

“While the growing choice of high-protein food and drink is creating intensified competition, convenient formats and increasing availability in the mainstream are helping to make sports nutrition more accessible. Interest in products supporting gut health and those featuring health-boosting herbs and spices highlights these as areas ripe for innovation.”

The Leisure Outlook - Quarterly Update - UK

“Consumers cut back on spending and put more focus on their health at the start of the year. As we approach summer peoples’ priorities appear to be shifting. A quality over quantity mind-set is still apparent but intention to spend on drinking and dining out is on the rise. Leisure ...

Attitudes towards Lunch Out-of-home - UK

“The convenience of quick meals is a key driver for the lunch-to-go market amongst time-poor consumers. Operators should also consider the grey pound as a good long-term growth driver for leisurely eating out occasions, led by Baby Boomers who are more inclined to sit down for a lunchtime meal.” ...

May 2018

Consumer Snacking - UK

“Snacking remains an ingrained habit for Britons. The view of snacks as an important energy source throughout the day, and as a necessity in busy lifestyles, underpins this habit. It also points to further longevity for snacking and the relevance for snacks to align with catering to or countering busy ...

Chocolate Confectionery - UK

“Premiumisation remains a strong trend in the chocolate market. As references to provenance have become prevalent in premium chocolate, going a step further and educating consumers on how the taste of the chocolate is influenced by the origin of the cocoa beans, could help brands connect with consumers on a ...

April 2018

Sweet Biscuits and Snack Bars - UK

“Both more indulgent features, such as a thick covering of chocolate and indulgent fillings, and naturally healthy ingredients, are of strong interest to eaters of sweet biscuits. Tailoring NPD to both these demands is needed

The Savvy Food Shopper - UK

“A savvy shopping mentality is firmly ingrained among UK consumers when it comes to their grocery purchases. That this is underpinned by emotions as well as by monetary gains, signals continuing longevity.

to maximise the number of usage occasions for biscuits. Limiting the amount of sweet biscuits ...

Convenience Stores - UK

“Growth in the convenience sector accelerated for the third consecutive year, in part driven by inflation. However, it was the structural changes, both through acquisitions and failures, which made it a defining year for the sector. The increased power of the multiples in the market is likely to be both ...

However, there are plentiful opportunities for brands and retailers to connect with the savvy shopper beyond promotions. Positioning ...

Added Value in Dairy Drinks, Milk and Cream - UK

“Animal welfare attracts strong consumer interest. Recent negative publicity around the dairy industry adds further urgency for high-welfare dairy systems to tangibly demonstrate their credentials to consumers. High-welfare products will also need a prominent positioning in-store to disrupt most people’s habitual approach to buying milk.”

– Alice Baker, Research ...

March 2018

Consumers and the Economic Outlook - Quarterly Update - UK

“People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

Online Grocery Retailing - UK

“The smallest and quickest-growing aspect of the grocery market, online grocery is a sector that has seen a vast number of innovations in the past year as it strives to evolve to cater not just for big-basket supermarket-style shops but also for smaller top-up-based shops.”

Health Food Retailing - UK

“The health food specialists have capitalised on the health and wellbeing trend but it hasn’t been easy as supermarkets and online players have increasingly muscled in on the market. The most important factor for specialists is trust, both as a way to combat the threat of the competition but also ...

Brand Overview: Food - UK

“Expectations of brands and the categories they are in key to consumer perceptions. Breakfast cereals are a clear example of this. Health standards set by certain brands impact upon the way in which other brands that do not match up are viewed. Conversely, brands in treat categories largely avoid being ...

Baby Food and Drink - UK

“With the income squeeze likely to further boost the popularity of homemade food, it is imperative for manufacturers to convince consumers that their products are worth paying more for. Highlighting ingredient provenance would help to project an image of quality and transparency, much needed given parents’ low trust in brands ...

The Leisure Outlook - Quarterly Update - UK

“Although participation in many leisure activities continues to grow there are areas of the market that may begin to struggle if consumers begin to increase their saving habits. There is a growing range of eating out venues so pubs and restaurants need to stay innovative.”

– Helen Fricker, Associate ...

Cakes, Cake Bars and Sweet Baked Goods - UK

"While this is a mature market in terms of overall usage, most people do not treat themselves to cakes and sweet baked goods that often, with scope for increasing frequency of usage. A mixture of activity is needed to appeal, as a broad spread of attributes are important to people ...

February 2018

Pasta, Rice and Noodles - UK

"Convenience and value for money remain key strengths for the category and should support the market if inflation remains high and consumer incomes are squeezed. Meanwhile, encouraging new dish and cuisine pairings for pasta, rice and noodles remains key to establish new usage occasions and drive volume growth."

– ...

World Cuisines - UK

"Improved ranges, particularly in own-label and in emerging cuisines, are providing a boost to sales. With interest in emerging world cuisines still significantly higher than current at-home eating though, a big opportunity exists for further sales growth through building familiarity with less widely eaten dishes. This includes using promotions and ...

January 2018

Condiments and Dressings - UK

"Wider trends in the food market, such as consumers' appetite for emerging cuisines, have impacted usage of condiments/dressings. While this has hit sales of dish-specific sauces, NPD in mayonnaise inspired by hot and spicy flavours has re-energised the segment. Sizeable interest in fermented condiments and a wider availability of ...

Sugar and Gum Confectionery - UK

Food Packaging Trends - UK

"The spotlight on plastic packaging and its environmental impact will be a key driver of change in the food industry. Consumers' expectations for sustainable packaging are set to heighten demand for alternative materials. Responding to the shifting demographic backdrop is also vital, given the growing number of small households and ...

Attitudes towards Healthy Eating - UK

"The income squeeze coupled with the perceived expense of healthy food has the potential to curb the overarching healthy eating trend. However, it also opens ripe opportunities for retailers to provide more support for shoppers in making choices which are both healthy and price savvy – doing so should promote ...

Crisps, Savoury Snacks and Nuts - UK

"While enjoyment and indulgence play a key role in the market, health considerations are also affecting it, driving the growth in popcorn, nuts and meat snacks. That half of savoury snack eaters deem snacks made with pulses healthier than potato-based ones suggests scope for further NPD here."

– Anita ...

“With volumes sales of sweets expected to continue to fall, the onus is on companies to encourage trading up within the category. The premium end of the market, however, remains underdeveloped – despite strong consumer demand – creating ripe opportunities for innovation in this area. High quality ingredients, sophisticated flavours ...