

### February 2021

#### Meat Substitutes: Inc Impact of COVID-19 - UK

“While lapsing during the COVID-19 pandemic, the meat reduction movement is expected to quickly rebound, driven by its perceived benefits related to health, weight management, sustainability and money-saving. However, meat substitutes must really deliver on these factors to reap the rewards from this trend.

A sharper focus on nutritional excellence ...

### January 2021

#### Pizzas and Pies: Inc Impact of COVID-19 - UK

“More meals and snacks being eaten at home during the COVID-19 pandemic boosted retail sales of both pizza and savoury pastries during 2020. The income squeeze in 2021 and the enduring rise in home working longer term will continue to benefit the category, although consumer interest in healthy eating will ...

#### Cooking Sauces and Pasta Sauces: Inc Impact of COVID-19 - UK

“The restrictions and lockdowns enacted to combat the spread of COVID-19 in 2020 have provided a boost to cooking and pasta sauces. The category has benefited from the edict to work from home, a reluctance to visit foodservice venues and people tightening their purse strings. The expected shift towards more ...

#### Foodservice in Retail: Incl Impact of COVID-19 - US

“While COVID-19 has forced many retailers to scale back high-contact self-serve prepared food offerings, foodservice will emerge from the pandemic more essential than ever to grocery retailers’ long-term growth prospects but will also face even greater competition. Now is the time for retailers to explore expanded menus and ways to ...

#### Carbonated Soft Drinks: Inc Impact of COVID-19 - UK

“Emotion-led motivations to drink CSDs have come to the fore since the COVID-19 outbreak and will be pivotal in driving usage in its aftermath, with nostalgia helping to create a feel-good factor. Strengthening associations with emotional wellbeing, for example with ingredients linked to relaxation, will resonate. There are also more ...

#### Attitudes towards Cooking in the Home: Inc Impact of COVID-19 - UK

“The COVID-19/coronavirus outbreak has meant people have found themselves cooking at home more, some out of necessity and some thanks to having more time in their day. Many have developed new skills and there’s marked appetite among many consumers for retaining these habits. Despite this, ease and speed of ...

#### Eating Out Review: Inc Impact of COVID-19 - UK

“For years, pubs and coffee shops have been vying with one another in ruling the high street, and with more consumers staying at home since the start of the pandemic, a fundamental human need for community unlocks the opportunity for both to respond and give consumers a sense of belonging ...

## Food and Drink - International

### RTD Alcoholic Beverages: Incl Impact of COVID-19 - US

“RTD alcoholic beverages are a bright spot in the alcohol space, avoiding the flight seen in other alcohol categories and even continuing to recruit new and older users. Seltzers remain the growth driver, getting a further boost from large brands entering the market from both within and outside the alcohol ...

### Sugars and Alternative Sweeteners: Incl Impact of COVID-19 - US

“Like many food and drink categories, after years of weakening sales, the sugars and alternative sweeteners category was the recipient of a significant tailwind from COVID-19 as a result of the dramatic increase in at-home consumption occasions. Consumers are turning to a diverse array of sweeteners, especially those with a ...

### Food and Drink Nutrition Claims: Incl Impact of COVID-19 - US

“The immune support claim has become of paramount importance to consumers in 2020 due to fears of the virus, and brands, especially beverage brands, are already responding by creating new products featuring vitamins/ingredients including vitamins C and D, and zinc. Consumers want foods and drinks that offer functional benefits ...

### Supermarkets: Inc Impact of COVID-19 - UK

“COVID-19 will bring a record year for the grocery sector in terms of sales and 2020 will also be the year to mark a rebalancing of the sector. A legacy boost to online will naturally take more demand away from large-format stores and will mean a further rethink about how ...

## December 2020

### Nuts, Seeds and Trail Mix: Incl Impact of COVID-19 - US

“The pandemic has reinforced consumer interest in health and wellbeing, and driven at-home consumption of nuts, seeds and trail mix. Consumers are seeking comfort, pleasure and satisfaction in healthy snacks, supporting category growth. However, economic uncertainty also reinforces consumer interest in value. This has created challenges for major brands in ...

### The Future of Foodservice: 2021: Incl Impact of COVID-19 - US

“The US foodservice industry saw unprecedented challenges in 2020 due to the pandemic and recession. These challenges will continue to plague restaurants in 2021, especially full-service ones, delaying a full sales recovery until 2023. To survive the ongoing crisis, restaurants must become off-premise business experts, engaging consumers in new and ...

### Super Protein: Incl Impact of COVID-19 - US

“Despite the buzziness of plant-based proteins, consumers are still widely engaged with animal-based proteins. While the majority of consumers have made no changes to their protein consumption patterns, for those that have implemented active change, more consumers are increasing rather than reducing. Health, perhaps ironically, is the catalyst for both ...

### White Spirits: Incl Impact of COVID-19 - US

“Spirit brands are reeling from the loss of on-premise sales, and consumers facing economic hardships prioritize known, familiar brands over experimentation. Opportunities within the market exist despite these challenges. Tequila and gin continue to thrive due to the popularity of premium varieties, and tequila and gin brands are embracing innovation ...

### Beer: Inc Impact of COVID-19 - UK

### Food and Drink Shopper: Incl Impact of COVID-19 - US

## Food and Drink - International

“Beer sales have been hit hard by the closure of pubs and bars and restrictions during the COVID-19 pandemic, with the increased sales through retail not enough to make up for lost sales through the on-trade. This will mean a bigger emphasis for beer brands on beer drinking at home ...

### Better for You Eating Trends: Incl Impact of COVID-19 - US

“Many adults rely on better-for-you food products to some degree in supporting their physical and mental wellbeing. The association of better-for-you foods with immune system health will support the market throughout the pandemic and ongoing recession. BFY brands have opportunities to expand their audience – especially to parents, younger adults ...

“While the COVID-19 pandemic has accelerated innovation in food and drink retail and motivated behavior changes among food and drink shoppers, its biggest impact on the industry may have been to amplify the underlying emotional benefits of the task. More than ever, food and drink shopping is a way to ...

### Beer: Incl Impact of COVID-19 - US

“Beer is losing out to other alcohol categories on the measures of health, taste and even value for which it held a historical advantage. While the COVID-19 pandemic will lead to the first dollar declines in the category for some time, it will also allow beer players an opportunity to ...

## November 2020

### Cheese: Incl Impact of COVID-19 - US

“COVID-19 has provided a tailwind to previously slow growth in the cheese category, resulting in significant sales increases across each segment and for players both big and small. Consumers have used more cheese both at meals and as a snack during the pandemic, pointing to the importance of cheese’s inherent ...

### Burger Trends: Incl Impact of COVID-19 - US

“Burgers are a foodservice favorite that offer flavor and ingredient versatility that makes them a comforting and convenient choice for consumers looking for familiarity or adventure in their quarantine cuisine. In these uncertain economic times, QSRs and fast casuals are not surprisingly seeing the most success with burgers due to ...

### Hot Dogs and Sausages: Incl Impact of COVID-19 - US

“Between the category depth, versatility and cost-effectiveness, hot dogs and sausages were well positioned both during the pandemic and for the economic uncertainties it triggered. The category made significant sales gains, including a considerable turnaround for the hot dog segment after consecutive years of declining sales. Breakfast sausage is also ...

### Dark Spirits: Incl Impact of COVID-19 - US

“Spirit brands are reeling from the loss of on-premise sales and as consumers facing economic hardships prioritize known, familiar brands over experimentation. Opportunities within the market exist despite these challenges. Successful dark spirit companies are highlighting their heritage while also embracing innovation by experimenting with various casks and launching RTD ...

### Fast Casual Restaurants: Incl Impact of COVID-19 - US

“Fast casual restaurants are moderately damaged by the COVID-19 crisis and large shift to working from home, although they are able to more easily pivot to off-premise business needs than their full-service

### Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK

“While the COVID-19 outbreak gave a boost to retail wine sales, these are in the firing line for cutbacks in 2021 amid pressure on household incomes. Meanwhile

## Food and Drink - International

counterparts. Fast casuals are well-suited to recover and grow during the recession as consumers seek out more high-quality ...

### Pizza and Italian Restaurants: Inc Impact of COVID-19 - UK

“The entrepreneurial spirit of pizza and Italian restaurants/takeaways is strong and some have actively sought out change and embraced innovation amid the pandemic. The first step is to reach out to consumers who need at-home and contactless dining options, and some of these concepts are worth continuing as a ...

### Food and Non-food Discounters: Incl Impact of COVID-19 - UK

“The discount sector is well positioned to benefit from the economic uncertainty in the UK caused by the COVID-19 pandemic. With a more mature market, competition will be fierce and retailers will have to work hard to differentiate themselves. The food discounters have managed to carve out a unique niche ...

### Meal Kits: Incl Impact of COVID-19 - US

“While meal kits have seen ups and downs since the first services started to appear around 2012, the COVID-19 pandemic has provided the industry with a boost as consumers have focused on home cooking and looked to limit grocery shopping trips. The increase in demand has also at least temporarily ...

### Dairy and Non-dairy Milk: Incl Impact of COVID-19 - US

“The milk market is comprised of two distinct groups, dairy and non-dairy, with the former being the behemoth in terms of market share. However, non-dairy stealthily continues to grow its share through innovation and by leveraging eco-friendly and functional health attributes. While there is a degree of cannibalism between the ...

consumers’ heightened health awareness will accelerate the alcohol reduction trend. Opportunities remain, however, for small bottles to appeal as offering portion control and ...

### Cheese: Inc Impact of COVID-19 - UK

“COVID-19 has provided a boost to cheese sales. Its value proposition, shelf life and versatility will have worked in the category’s favour during the strict spring lockdown, with the leading cheddar segment and recipe cheese benefiting as people ate at home and cooked from scratch. Cheese’s affordable image and the ...

### Breakfast Eating Habits: Inc Impact of COVID-19 - UK

“More people having breakfast at home every day during the COVID-19 pandemic boosted retail sales of breakfast foods, but with a return to workplaces and schools brands in breakfast foods face a challenge holding on to some of these increases in sales. Healthier but convenient breakfasts are a big opportunity ...

### Wine: Incl Impact of COVID-19 - US

“The size and breadth of the wine category puts it in a strong position to respond to the impact COVID-19 has played on where, when, and how much consumers drink. In the near term, wine brands will need to define and own drinking occasions in an environment that limits the ...

October 2020

### Foodservice Alcohol Trends: Incl Impact of COVID-19 - US

### Breakfast Foods: Incl Impact of COVID-19 - US

## Food and Drink - International

“Foodservice alcohol sales saw immense losses in 2020 due to the COVID-19 crisis and ensuing recession, just as with foodservice sales overall. Instead of purchasing alcohol from restaurants and bars, consumers stocked up on packaged alcohol from retail channels, which stole enormous market share away from alcoholic beverages sold through ...

### Coffee: Inc Impact of COVID-19 - UK

“COVID-19 has provided the coffee market with a temporary boost, as the nationwide lockdown brought out-of-home coffee to the home overnight. As the lockdown continues to be eased, however, more coffee occasions are expected to shift back out of home, albeit to a lesser extent than previously. Whilst coffee in ...

### Dark Spirits and Liqueurs: Inc Impact of COVID-19 - UK

“Despite being a major threat to the market, the re-energised focus of health since COVID-19 also presents opportunities. Being almost non-existent in this category, the rapidly growing low-/no-alcohol space is ripe for development in dark spirits, as is NPD in lower sugar/calorie liqueur drinks. The rise in at-home ...

### Yogurt and Yogurt Drinks: Incl Impact of COVID-19 - US

“Stay-at-home orders mandated by the pandemic have accelerated yogurt’s return to relevance, as consumers cling to familiar, affordable, health-focused options to meet snack cravings for themselves and their families. The yogurt drinks segment will require some more finessing to find footing, given its strong draw for portability, but has an ...

### The Future of Quick Service Restaurants: Inc Impact of COVID-19 - UK

“As most QSR operators are forced to streamline their business in response to COVID-19, menu innovation needs to focus on healthful choices as well as broadening consumers’ at-home experiences. These include diet-

“The pandemic prompted a shift in breakfast, with at-home consumption taking a greater role and options from foodservice operators significantly diminished, as morning commutes were, for much of the country and the year, also reduced. Consumers will crave the experience of foodservice-style breakfast and brunch, suggesting that menu-inspired packaged options ...

### Vitamins, Minerals and Supplements Trends: Incl Impact of COVID-19 - US

“The vitamins, minerals and supplements market will continue to grow despite the economic downturn, due to strong associations in supporting specific areas of wellness, particularly ones trending in the time of COVID-19. While multivitamins continue to show highest usage, consumer demand for more targeted benefits beyond overall wellness continues to ...

### Pet Food: Inc Impact of COVID-19 - UK

“The recession triggered by COVID-19 is prompting consumers to scrutinise their spending. The extensive private label presence on the one hand and the myriad of small specialist brands on the other leave mainstream brands faced with a formidable task to prove their value. Health is as much of a focus ...

### Bread: Inc Impact of COVID-19 - UK

“COVID-19 has provided a boost to the bread category. With the nationwide lockdown, bread volume sales, which have been on a downward trajectory for several years, rose, thanks to out-of-home breakfasts and lunches shifting to the home overnight.

specific meals as well as meal kits featuring fast food recipes.”

### September 2020

#### Hot and Cold Cereal: Incl Impact of COVID-19 - US

“With wellbeing, value and convenience top-of-mind, cereal brands have more than one path to staying relevant with shoppers. After years of declines and stagnation, the cereal category returned to sales growth in 2020 due to COVID-19. Sudden and enduring shifts in daily, especially morning, routines impacted the cereal category, with ...

#### Vitamins and Supplements: Inc Impact of COVID-19 - UK

“The pandemic will drive demand for vitamins and supplements as health and wellness become bigger consumer priorities. Immune health in particular is in the spotlight, and brands can look to offering more holistic solutions, considering the links between stress, sleep, nutrition and diet on immunity. The category is expected to ...

#### Attitudes towards Sports Nutrition: Inc Impact of COVID-19 - UK

“While the COVID-19 lockdown has severely curbed exercise opportunities, the outbreak has sparked a keener interest in health and exercise that could open up opportunities for sports nutrition ahead. The economic downturn however poses a stark challenge in the short term, as the market faces intense competition from more affordable ...

#### Fruit: Incl Impact of COVID-19 - US

“The fruit category comprises two distinct groups, fresh and processed, with the former being the behemoth in terms of market share. Fresh accounts for 90% of fruit sales, leveraging a reputation as relatively healthy and largely convenient. Where fresh fruit falls short in terms of health (principally in sugar content ...

#### Pizza Restaurants: Incl Impact of COVID-19 - US

“Pizza restaurants are an indisputable bright spot amid a struggling restaurant industry as a result of the COVID-19 crisis. Many leading pizza chains have managed to grow sales into the double-digits in 2020 due to their continued investments in takeout and delivery and prioritization of value. Pizza restaurants are positioned ...

#### Restaurant Breakfast and Brunch Trends: Incl Impact of COVID-19 - US

“The ease and affordability of making breakfast at home paired with the increase in remote working means the recovery of foodservice breakfast sales will lag behind the foodservice industry as a whole. LSRs facing fierce competition will launch aggressive promotions in a race to the bottom on price in order ...

#### Fish and Shellfish: Inc Impact of COVID-19 - UK

“The lockdown helped boost the sales of frozen and ambient as people sought out long-life products. As incomes come under pressure, fish/shellfish’s relatively high price means cutbacks are on the cards. The segment’s healthy image should see it benefit from the increased health focus in the wake of the ...

#### The Future of Eating Out: Inc Impact of COVID-19 - UK

“Eating out will become more of a treat giving an opportunity for foodservice venues to create more premium options to fit special occasions. But first, an effective response to COVID-19 is required to safeguard the future of eating out. The virus should prove to be the catalyst for the adoption ...

## Food and Drink - International

### Attitudes towards Premium Alcoholic Drinks: Inc Impact of COVID-19 - UK

“Sales of alcoholic drinks have been hit hard by the COVID-19 pandemic, and encouraging consumers to pay more for drinks will be challenging during a recession. It will be ever more important for brands to give drinkers reasons to pay higher prices, including through communicating superior taste, featuring ‘craft’ cues ...

### Breakfast Cereals: Inc Impact of COVID-19 - UK

“COVID-19 has provided the stagnating breakfast cereals market with a temporary boost, as the nationwide lockdown brought out-of-home breakfasts to the home overnight. As the lockdown continues to be eased, however, more breakfast occasions are expected to shift back out of home, the category seeing growth slow.

### Tea and RTD Tea: Incl Impact of COVID-19 - US

“Tea in all its forms has been given a boost by COVID-19 and the changes it has brought to the routines of work and shopping. With natural and inherent properties that convey a plethora of health benefits, like immunity and relaxation, tea’s profile will rise during the pandemic. The category ...

### Vegetables: Incl Impact of COVID-19 - US

“The vegetable category is notoriously dichotomous: while fresh vegetables have a well-enforced healthy reputation, non-fresh segments fall shorter on BFY associations but deliver on convenience and value. COVID-19 triggered increased sales across every vegetable segment, even the beleaguered canned segment, indicating that even when health is an elevated priority ...

### Vitamins, Minerals and Supplements Consumer: Incl Impact of COVID-19 - US

“Vitamins, minerals and supplements comprise a dynamic market that has seen consistent growth for over a decade. Dedicated VMS consumers consider these products to be a staple to their overall wellbeing, and most will budget for them despite economic hardships. Still, products with high-quality ingredients at the lowest price point ...

### The COVID-19 Impact on Foodservice: Operation Recovery - US

“The COVID-19 public health and economic crisis is creating unprecedented revenue loss for restaurants of all types, although FSRs with a dine-in focus have been the hardest hit. In order to survive and recover, restaurants will all need to offer and invest in easy, efficient and affordable takeout and delivery ...

### Marketing to Moms: Incl Impact of COVID-19 - US

“In 2020, moms are facing unexpected challenges. Between maintaining their family’s health and safety through the COVID-19 pandemic and addressing and explaining the various aspects of the Black Lives Matter movement and demonstrations to their children, moms have had their hands full. However, even given all of this, moms still ...

August 2020



## Food and Drink - International

### The Gen Z Diner: Incl Impact of COVID-19 - US

“Gen Z is a stressed-out generation coming of age in a time with great unrest and facing grim economic prospects. Restaurants need to respond to Gen Z’s anxieties by focusing on value – whether that be value from low prices, promotions, or high-quality dishes at moderate prices. LSRs are best ...

### Tea and Other Hot Drinks: Inc Impact of COVID-19 - UK

“While proving troublesome for many markets, the COVID-19 crisis has provided the necessary ingredients needed to reverse the fortunes of the ailing tea and other hot drinks categories. Some of the long-term legacies of the pandemic will also support sales, such as greater remote working and an emphasis on physical ...

### Yogurt and Yogurt Drinks: Inc Impact of COVID-19 - UK

“The changes to consumers’ habits and priorities brought about by the COVID-19 lockdown hit spoonable yogurt in spring 2020. The income squeeze triggered by the outbreak means challenging times ahead for brands, dialling up the need to prove their added value in the already highly price-led category. The heightened focus ...

### Food Packaging Trends: Incl Impact of COVID-19 - US

“Food packaging, the often-underappreciated element of food at retail, has a chance to shine within a marketplace and consumer base impacted by COVID-19, with 74% of consumers saying they prefer to buy products with packaging that will protect the contents from contamination. Accelerated adoption of ecommerce, heightened attention toward health ...

### Frozen Snacks: Incl Impact of COVID-19 - US

“Before COVID-19, frozen snack sales growth had been banal: steady but slow since 2016. However, at the core of the categories’ offerings are convenient meal and snack solutions, which provided value during sheltering

### Natural and Organic Food Shopper: Incl Impact of COVID-19 - US

“The natural and organic food and beverage market is supported to some degree by over half of US adult consumers, and this is likely to remain steady in the years ahead. The health associations of natural and organic foods will make them more important than ever during a global health ...

### Soup: Incl Impact of COVID-19 - US

“After years of little growth, COVID-19 has rejuvenated the soup category across segments. Powerful associations with comfort, affordability and convenience are paying off for brands big and small, which are seeing unprecedented levels of growth as consumers find a sense of security and value in the preparedness of a well-stocked ...

### Foodservice Coffee and Tea: Incl Impact of COVID-19 - US

“Demand for premium made-to-order coffee was strong at the start of 2020 but the market was completely shaken by pandemic-related disruptions. High unemployment is encouraging consumers to choose affordable retail coffee products while the increase in remote working reduces many consumers’ need for AFH coffee. Coffeehouse chains will engage in ...

### Marketing to Gen X: Incl Impact of COVID-19 - US

“Generation Xers crave stability and the reassurance that they will be prepared for the future. Financial concerns make them value-driven shoppers and they look for purchases that offer quality products and affordable pricing rather than a distinctive brand personality. The current recession will only intensify their budget-mindedness as Gen Xers ...

### Attitudes towards Pub Catering: Inc Impact of COVID-19 - UK

“COVID-19 will change consumers’ motivations for eating out. When people choose to eat out in future, they will do so as a special treat and not as a quick and convenient meal solution. As a result, pubs/bars need to



## Food and Drink - International

in place, especially for parents and families, already the most engaged participants. 2020 frozen snack sales bounded ...

### Ready Meals and Ready-to-cook Foods: Inc Impact of COVID-19 - UK

“During the COVID-19 pandemic demand for ready meals has been hit by people doing more cooking from scratch. Offering quick meals is still important though, and NPD should focus on both better-for-you options that tap interest in healthy eating, as well as meals that are attractive as a nice treat ...

### Coffee and RTD Coffee: Incl Impact of COVID-19 - US

“The at home coffee market will benefit more than any non-alcoholic beverage category from the short and long term changes brought about by COVID-19 and the recession. The pandemic completely removed retail coffee’s foodservice competition and shelter-in-place orders forced many to work from home, reducing their need for away from ...

### What Children Drink: Inc Impact of COVID-19 - UK

“Health is set to become an even higher priority for parents in the wake of the COVID-19 pandemic, providing a golden opportunity for children’s drinks with functional benefits. Drinks supporting eye health, gut health and ‘tooth friendly’ drinks warrant exploration, attracting significant consumer interest with little availability in the market ...

cater to more purpose-driven consumers than ever before, including creating ...

### Restaurant Takeout and Delivery: Incl Impact of COVID-19 - US

“Virtually all restaurants became takeout and delivery providers overnight as a result of COVID-19, and the ones that had made prior investments in off-premise business are unsurprisingly weathering the storm the best thus far. Restaurants of all types must continue to invest in takeout and delivery services as consumer behaviors ...

### Consumer Snacking: Inc Impact of COVID-19 - UK

“Snacking continues to be an ingrained part of UK lifestyles. With COVID-19 prompting a nationwide lockdown, out-of-home snacking disappeared overnight, but the traditional associations of many snacks as offering a low-cost mood boost kept them firmly on the menu at home.

### Juice and Juice Drinks: Incl Impact of COVID-19 - US

“Juice has been going through an identity crisis of sorts, which has put the category in a tough spot. Products tend to toe the line between healthy and indulgent without committing to either position, leaving consumers confused and disengaged. While it’s been relegated to very specific consumption occasions as a ...

## July 2020

### Chocolate: Inc Impact of COVID-19 - UK

“Although the market has proven resilient in past difficulties, the economic downturn triggered by the COVID-19 outbreak will coincide with new challenges. The heightened spotlight on health will dial up the pressure from the existing sugar reduction targets. However, there is openness to reduced sugar variants and opportunities within flavour ...

### Brand Overview: Drink: Inc Impact of COVID-19 - UK

“Since the COVID-19 outbreak, the drinks industry has faced unprecedented challenges while also glimpsing unexpected opportunities as consumers embrace new drinking habits and as associations between health and diet strengthen. However, economic uncertainty will drive consumers to price-oriented purchasing behaviours, meaning that it will be vital for brands to emphasise ...

### Convenience Stores: Inc Impact of COVID-19 - UK

"The shift to localised shopping during the peak of COVID-19 will have benefited the convenience sector, driving larger-basket demand and sales as consumers necessarily shopped more in their local communities. Longer term the importance of c-stores within these communities will only be reinforced, presenting opportunities for convenience retailers to tap ...

### Marketing to Millennials: Incl Impact of COVID-19 - US

"Fate has not favored Millennials – hitting them first with the Great Recession as the oldest were starting careers and again with a pandemic just as some were finding stability. Most want the consistency of homeownership and employment benefits, but those goals are out of reach for some. Nevertheless, many ...

### Non-Chocolate Confectionery: Incl Impact of COVID-19 - US

"Household penetration of non-chocolate confectionery has dipped, with consumers citing a desire for sugar and calorie reduction as leading factors driving reduced consumption. COVID-19 should provide a buffer against sales stagnation, as uncertain times benefit categories that provide familiarity and affordable pleasure. However, a longer view needs to be taken ...

### Kids' Snacking: Inc Impact of COVID-19 - UK

"The COVID-19 outbreak has disrupted children's snacking patterns, driving frequency of at-home snacking while curbing impulse buying and eliminating school lunchbox occasions. Concerns have been raised that increased at-home snacking plus decreased activity will have a slew of negative effects on children's health, including obesity and poorer dental and eye ...

### Drinks Packaging Trends: Inc Impact of COVID-19 - UK

"With the COVID-19 crisis monopolising the nation's attention and media coverage, the plastic waste issue has fallen off the radar to a certain extent. However, while immediate concerns around packaging waste will

### Beverage Packaging Trends: Incl Impact of COVID-19 - US

"The US non-alcoholic beverage market remains crowded, with steady waves of new products vying for consumer attention in all channels. Product packaging plays a leading role in this battle, yet one that most consumers do not recognize as an important part of their choice."

- Eric Wenner, Associate Director

### Dairy Alternatives: Incl Impact of COVID-19 - US

"Once serving only a niche audience comprised of those who avoided dairy due to allergies or a vegan diet, dairy alternatives have seen tremendous growth in recent years, and are now used by adults across the dietary spectrum. Consumers have more choices than ever before, and long-time players are challenged ...

### Foodservice Loyalty: Incl Impact of COVID-19 - US

"Restaurant business is severely negatively impacted by the ongoing COVID-19 crisis, and while restaurant loyalty won't be enough on its own to keep restaurants in business, companies will still need to strategically leverage existing loyal customers to help grow now-essential off-premise business as well as refill their dining rooms in ...

### Plant-based Proteins: Incl Impact of COVID-19 - US

"Plant-based proteins have seen a rise in popularity despite the fact that most adults continue to eat real meat. Plant-based foods enjoy a health halo, and adults who use plant-based protein sources state they do so to be healthier more than any other reason. But taste and variety are also ...

### Bottled Water: Inc Impact of COVID-19 - UK

"The loss of high-value impulse occasions during the COVID-19 outbreak in 2020 has severely disrupted the bottled water market. The market faced scrutiny prior to the outbreak as the nation has looked to combat plastic

have taken a back seat for many, a quarter of people reported that the environment had become a ...

packaging waste. The economic downturn adds to its woes, further boosting the appeal of tap ...

### 牛奶和乳饮料 (含新冠疫情分析) - China

“近几年，牛奶和乳饮料市场的增速有所放缓，但将保持缓慢且稳定的增速。除了当前正在进行的供应链改革（如上游供应商的整合或建立以数据为中心的物流系统），产品还需进行其他升级，以证明其溢价的合理性。品牌将进一步开发冷藏细分品类，以满足消费者对营养和新鲜度日益增长的需求。在纯牛奶中，更多的功能性宣称将与营养宣称融合，而增加风味牛奶的饮用场合或许是扭转下滑趋势的有效之策。市场将从新冠疫情造成的短期物流中断中恢复到先前的水平。长期市场前景并未动摇，因为许多消费者认为牛奶有助于增强免疫力，这是新冠疫情之后消费者越来越重视的健康益处。”

——蒋安妮，研究分析师，食品和饮料，2020年4月30日

## June 2020

### Dairy and Non-dairy Drinks, Milk and Cream: Inc Impact of COVID-19 - UK

“The impact of COVID-19 on the dairy and non-dairy drinks, milk and cream market will be limited. A surge of in-home milk consumption in hot drinks, cooking and baking will boost retail sales during the lockdown. In the medium to long term, sustainability will continue to pique consumer interest and ...

### Marketing to Gen Z: Incl Impact of COVID-19 - US

“Life was already stressful for Gen Z, but the impact of the COVID-19 pandemic will only amplify the stress and uncertainty that teens and young adults face. As they learn to define themselves as individuals and embark on new lives as independent adults, disruptions to high school and postsecondary education ...

### Energy Drinks: Inc Impact of COVID-19 - US

“The energy drink market has enjoyed consistent year-over-year growth even through the previous recession,

### Prepared Meals: Incl Impact of COVID-19 - US

“Prepared meals, particularly frozen options, are essential “pantry” items that help consumers feel, well, prepared and even a sense of security, a notion that is even more important during a crisis. And they will play a vital role in the undoubtedly challenging days ahead. Consumers are seeking familiar and comforting ...

### Chocolate Confectionery: Incl Impact of COVID-19 - US

“Chocolate confectionery is a mature category that’s seeing some of its strong grip on the hearts of consumers loosen. As other snack categories make a play for indulgence, and offer BFY positioning, consumers are playing the field. While the COVID-19 pandemic will be a good reminder that little hits the ...

### Carbonated Soft Drinks: Inc Impact of COVID-19 - US

“The top-heavy carbonated soft drink category has a unique advantage in this equally unique time: deeply

## Food and Drink - International

because the beverages offer a simple, easy-to-understand value proposition: they are a tasty, convenient source of energy. The market is not immune to the impact of COVID-19; shelter-in-place orders are highly detrimental for products like energy ...

rooted connections with not only their most engaged fans, but also with less frequent users. Decades of legacy brand building centered not only on refreshment and enjoyment, but also community and family, are likely ...

### May 2020

#### Ice Cream: Inc Impact of COVID-19 - UK

"Amid a rapidly evolving consumer environment during the COVID-19 outbreak, the market must respond to consumer health concerns while preserving the inherently indulgent nature of the ice cream category. While there is a sizeable interest in healthier options, key indulgence drivers such as texture must not be neglected when it ...

#### Food Packaging Trends: Inc Impact of COVID-19 - UK

"The COVID-19 outbreak has sharply increased the amount of food people eat at home, feeding through to increased demand for packaging for this. The big focus in food packaging in recent years has been on plastic reduction, and the industry has made major progress towards the targets set out by ...

#### Alcoholic Drinks Review: Inc Impact of COVID-19 - UK

"At the same time as facing the immediate upheaval brought about by the COVID-19 outbreak, the industry must also look ahead and respond to widespread consumer concerns about the healthiness of alcoholic drinks and the alcohol moderation trend, which the increased focus on health resulting from the outbreak will elevate ...

#### Cakes, Cake Bars and Sweet Baked Goods: Inc Impact of COVID-19 - UK

"COVID-19 will negatively impact the cakes, cake bars and sweet baked goods market in the short term. An increase in home baking as well as the loss of potential eating occasions due to the nationwide lockdown will inflict a hit. Any potential benefits gained from the fact that these products ...

#### Attitudes towards Premium Soft Drinks: Inc Impact of COVID-19 - UK

"Giving consumers more for their money will be vital, especially through the tough financial times many households face due to the COVID-19 outbreak. Proving and promoting health credentials will be crucial for brands in order to remain relevant to consumers' shifting tastes. Added value through functional benefits could be a ...

#### Baby Food and Drinks: Incl Impact of COVID-19 - US

"The market for baby/toddler food and drink remains strong, despite the fact that its principal target audience continues to dwindle. However, the COVID-19 pandemic and subsequent recession will push the birthrate down even further resulting in even fiercer competition among brands. Continued growth for the category will demand brands ...

#### Grocery Retailing: Incl Impact of COVID-19 - US

"Between 2014 and 2019, multi-outlet sales of groceries continued to rise steadily but slowly. The rapid escalation of the COVID-19 pandemic in March of 2020, however, gave the industry a jolt, boosting sales in the

#### Salty Snacks: Incl Impact of COVID-19 - US

"Salty snack sales growth outpaced other snack categories and while the category was expected to face a slowdown the COVID-19 pandemic will result in an unforeseen short-term boon for salty snack brands.

short term but introducing enormous new challenges as well. While the duration and severity of ...

Consumers are stocking up on shelf stable goods in general and seeking affordable, familiar, comforting foods such as ...

### Functional Drinks: Incl Impact of COVID-19 - US

"The growth of functional drinks is driven by busy consumers seeking shortcuts to enhanced health, primarily by younger adults and parents. While brands should stay on the pulse of the needs of this core audience, opportunities remain to reach older adults with products that support the healthy aging process. The ...

## April 2020

### Online Grocery Retailing - UK

"In 2019 growth slowed for the fourth consecutive year in the online grocery market, as the sector continues to struggle to reach new customers with much of the growth in the market coming from existing users. The start to 2020 has seen growth rapidly accelerate due to the COVID-19 outbreak ...

## March 2020

### Convenience Stores - US

"While fuel sales generate as much as two thirds of total convenience stores revenue and remain a core traffic driver, c-store operators are increasingly turning their attention to in-store categories as the most direct path to increased sales and profits. Still, convenience stores face considerable challenges in categories like foodservice ...

### Health Food Retailing - UK

The market for health foods continues to grow on the back of the rising trend for health and wellbeing but consumers remain sceptical of the potential benefits of the products. While there are opportunities for specialist retailers to remain relevant, online retailers and especially supermarkets have been working hard to ...

### Baby Food and Drink - UK

"That parents would like to see more chilled and frozen varieties poses an opportunity for further expansion in these areas, these being largely untapped in baby/toddler food. While moving into the chilled or frozen aisles comes with hurdles in terms of costs, price points, shelf-life and visibility, the strong ...

### Sugar and Gum Confectionery - UK

"With myriad products competing to give consumers a mood-boosting sugar fix during times of uncertainty, compelling NPD will remain vital for players in the sweets market. Lower-sugar sweets, vegan sweets and premium sweets continue to offer a lot of potential. Focusing on UK provenance and more environmentally friendly packaging would ...

## Food and Drink - International

### Sports and Performance Drinks - US

"The nearly \$9.5 billion market is expected to grow modestly over the next five years, reaching more than \$11 billion by 2024. Performance-centric claims and informative messaging can help set brands apart. However, competition from other functional food and drink options (eg water, BFY snack bars) will challenge the ...

### Sweet Biscuits and Snack Bars - UK

"The permissibility of eating small amounts of sweet biscuits each day is continuing to support sweet biscuit sales. Portion-size packs, healthier biscuits, seasonal lines and a quality over quantity approach all offer opportunities for brands in biscuits, but familiar favourites offering crunchy biscuits and chocolate coatings will remain most popular ...

### Potato and Tortilla Chips - US

"The chip category is in the midst of a decade of steadily growing sales, which should near \$17 billion by 2024. Nevertheless, the category faces challenges: increased snacking among consumers has boosted the category, certainly, but it has also led to a rise in competitors, particularly options which promise a ...

### Dips and Savory Spreads - US

"Increased snacking and innovation in the refrigerated segment have served the dips and spreads category, pushing expected sales to reach \$4.9 billion in 2020, a 3.4% increase from 2019. There is a momentum of innovation in the category, both benefiting and challenging category players, who will need to ...

## February 2020

### Attitudes towards Healthy Eating - UK

"People's openness to reformulation is good news for the industry, faced with government targets to make their products healthier, but also adds to the pressure to do so. That many would even welcome punitive measures such as taxing unhealthy foods provides food for thought for the government, but also to ...

### Cider - UK

"Promoting craft-style cues such as authenticity, heritage and high juice content may help cider to retain interest among drinkers looking for quality over quantity. Meanwhile, lower- and non-alcoholic variants have made strong inroads in the beer market and may provide more opportunities for cider brands in the coming years, particularly ...

### Food Ethics - US

"Food shoppers, especially those aged 18-34, feel increasingly strongly about holding the brands they purchase to high ethical standards, making it imperative for food marketers and retailers to consider ethics in every aspect of their business practices. Still, food shoppers also take a range of other factors into account. In ...

### Still and Sparkling Waters - US

"The bottled water market is characterized by the push and pull of two consumer desires; a pull from consumers interested in sustainability and a push from interest in health and wellness. Bottled water brands must make strides toward sustainability or risk being replaced by refillable water bottles and focus marketing ...

### Crisps, Savoury Snacks and Nuts - UK

"The wealth of better-for-you NPD has contributed to ongoing growth for this mature market. Consumers' ongoing appetite for more choice in healthier options, both for adults and specifically for children, signals that this area continues to offer opportunities and warrant

### Snack, Nutrition and Performance Bars - US

"The popularity of snacking helps and challenges snack, nutrition, and performance bars. The bars category has experienced steady growth as consumers look for healthy and convenient ways to satisfy hunger (and cravings), resulting in dollar sales gains of 17% from

## Food and Drink - International

attention. With taste remaining the top priority within this category ...

2014-19. However, the pace of growth has slowed as snack ...

### Nutrition Drinks - US

"Just under half of consumers live in households where nutrition, meal replacement or weight loss drinks are consumed, and sales are projected to steadily increase in years ahead. While products positioned as weight loss drinks garner the lowest sales and usage in the category, adults are turning to drinks across ...

### Full Service Restaurants - US

"The FSR (full service restaurant) sector continues to be outpaced by more affordable and innovative limited service concepts, especially fast casuals. The casual dining segment remains stagnant, although some operators are showing signs of success by curating fun and engaging on-premise experiences, and investing in quality food as well as ...

### Weight Management Trends - US

"Obesity rates continue to rise in the US, impacting the health and wellness of Americans. The majority of adults are currently managing their weight, with most relying on self-guided methods over branded nutrition programs. Brands addressing weight management must adopt a personalized, lifestyle-centric approach to garner consideration and use from ...

### Free-from Foods - UK

"With the free-from trend now a firmly established phenomenon, growth is expected to slow. The spotlight on sustainability should, however, support the demand for dairy alternatives. Products catering for special occasions and those for children hold potential for growing sales among established users."

### In-store Bakeries - US

"Sales at in-store bakeries have increased steadily each year for the past half-decade, growing 15% since 2014 to reach \$13.5 billion, and the category still seems to have a significant amount of potential. Younger consumers have yet to significantly engage in the category but should do so as they ...

### Crackers - US

"The crackers category continues to grow, topping \$8 billion in 2019, a modest 3.4% gain since 2014. The consistent, albeit minimal, growth of the "other" crackers segment was not enough to offset the struggles among other segments. Crackers remain a household staple with 87% penetration but stronger levels of ...

## January 2020

### Health Management Trends - US

"The start of a New Year and new decade has people inspired and setting numerous goals to improve their health and wellbeing. While setting goals is the first step, it's also the easiest. It's keeping the motivation throughout the entire year, and even decade, that most people need help with ...

### Consumer Approach to Nutrition - US

Consumers' views on nutrition and diet are varied, but, regardless of preferences, taste reigns supreme. Despite the media attention dedicated to specialized and trending diets, the vast majority of consumers prefer a simpler approach to eating, and desire flexibility in their meal choices. In fact, more consumers do not define ...

### Challenger Brands - US

"Across many major food and drink categories, smaller competitors are gaining market share at the expense of the big national brands that have long held dominant positions. The success of challenger brands is being

### Fruit Juice, Juice Drinks and Smoothies - UK

"The spotlight on sugar has put pressure on the category for several years now, but emerging health trends offer





## Food and Drink - International

driven by a new generation of shoppers, more open to new ideas in general and far ...

opportunities for these products to promote their health credentials. Growing focus on the importance of fibre points to NPD potential in fruit juices and smoothies, while the trend for reducing alcohol ...

### Private Label Food and Drink Trends - US

"Private label sales continue to grow, even in the wake of a largely positive economy that sees consumer confidence remaining high. Where value used to be the primary driver of private label food and drink choice, consumers are sticking with those brands and have even expanded their private label purchase ...

### White Spirits and RTDs - UK

"Fuelled by exponential growth in the popularity of gin, the white spirits category has elevated innovation in recent years to explore new flavours, colours and ingredients. However, brands will need to aim for uniqueness, sustainable credentials and provenance going forward to create premium, standout products that can weather increasing competition ...