

Dry Pasta, Rice, Noodles and Ancient Grains - US - February 2013

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“Manufacturers and retailers alike need to have a clear grasp on positioning, and a clear understanding of their consumers. Price still remains a smart strategy to take in this category, but consumers’ value proposition goes beyond price, involving quality, indulgence, and health as well.”

– John N. Frank, Category Manager CPG Food and Drink

In this report we answer the key questions:

- How can brands better differentiate themselves in a fragmented market?
- How can manufacturers increase awareness, encourage greater consumption of ancient grains?

The dry pasta, rice, and noodles category stands at an estimated \$6.7 billion in 2012 after a relatively strong performance seen at the start of the recession and a mixed one post-recession. While the category showed a 13.1% increase in dollar sales from 2007-08, the growth slowed but still registered an increase of 5.2% from 2008-12. It is indeed likely that consumers have turned to well-known household staples, such as pasta and rice, when the economy took a turn for the worse; however, a relatively more stable economic climate has likely made more people comfortable eating out. Additionally, while ancient grains dollar sales are not tracked in this report, ancient grains have grown in popularity and could benefit the category overall; furthermore, the gluten-free attribute that many ancient grains possess, coupled with a generally lower carbohydrate and caloric content, are all characteristics that fit with consumers’ increased interest in healthier eating.

Indeed, the ethnic food category is expected to grow by 9.3% from 2012-17; however, much is dependent on product innovation, particularly around healthier alternatives that emphasize the benefits. Therefore, whole grains, shorter ingredient lists, and an overall wholesome message are likely things that will resonate with consumers. While making a healthier profile (such as reducing the sodium, fat, and caloric contents) remains important, emphasizing such things could interfere with taste perception and decrease consumer appeal. Consequently, while price and convenience remain key for the category, a stealth health appeal also is likely to contribute to the expected positive performance.

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