

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The instant noodle market is forecast to stay flat over the next five years – declining a little due to consumers' increasing health consciousness. In order to drive business growth in the future, brands need to target the core users (people in their 20s) and take action to meet consumers' evolving eating preferences." Yujing Li, Senior Research Analyst

This report looks at the following areas:

- How can noodle brands target young consumers?
- How can instant noodle brands respond to consumers' higher eating standards?
- What are the regional differences in people's noodle eating habits and purchase factors?

What you need to know

Due to lack of significant product innovations and consumers' increasing health consciousness, the instant noodle market saw a decline in 2014 in value terms. Although packet instant noodles still account for a higher value share, this segment saw a low growth compared with cup/bowl instant noodles. Brands need to adapt to Chinese consumer's evolving eating preferences – for instance deliver more healthy food or invest more in flavor innovations – to grow the business.

This report provides information on the behavior of current packaged noodle consumers and instant noodle consumers. It goes into detail to understand which type of noodles consumers are more interested in and for which occasion they usually eat those noodle products. In the meantime, important consideration factors are also investigated in this report to guide brands in forming marketing and trade strategies.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас <u>+61 (0) 2 8</u>284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Figure 1: Definition of East, South, West, North and Middle consumer groups

Executive Summary

The market

Figure 2: Retail market value of instant noodles in China, 2010-20

Companies and brands

Figure 3: Value share of top 10 companies in instant noodle market, 2012-14

The Consumer

Ramen is the most popular type of noodle among consumer

Figure 4: Noodle types preferred, October 2015

Instant noodles become a snack for Chinese consumers

Figure 5: Occasions of eating noodles, October 2015

Noodles with traditional/local flavours win more consumers

Figure 6: Preferences towards flavours and cooking method, October 2015

Safety is the key factor to emphasise when marketing healthy packaged noodles

Figure 7: Healthy packaged noodle product, October 2015

High earners are open towards trying new brands

Figure 8: Attitudes towards instant noodle brands, by household income, October 2015

Health and taste come first as something consumers would be willing pay more for

Figure 9: Factors that consumers are willing to pay more for, October 2015

What we think

Issues and Insights

How can noodle brands target young consumers?

The facts

The implications

Figure 10: Examples of fun packaging in instant noodle products, Japan and China, 2014-15

Figure 11: Examples of instant products which contain a fun element in product packaging, Japan and China, 2014-15

How can instant noodle brands respond to consumers' higher eating standards?

The facts

The implications

Figure 12: Examples of instant noodle products which are enriched with vegetable or grains, USA and China, 2014

What are the regional differences in people's noodle eating habits and purchase factors?

The facts

The implications

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Market – What You Need to Know

Instant noodle market remained flat

Consumers' fast-moving pace of life and the development of prepared meals may impact the instant market

Packet instant noodles account for higher value share but have lower growth

Market Size and Forecast

Instant noodle market remained flat

Figure 13: Retail market value of instant noodles in China, 2010-15

Figure 14: Retail market value of instant noodles in China, 2010-20

Market Factors

Consumers' busy lifestyles may hinder retail growth

Competition from prepared meals

Targeting consumers who are reluctant to give up junk food

Market Segmentation

Packet instant noodles account for higher value share but with lower growth Figure 15: Retail market value of instant noodles in China, by segment, 2010-14

Key Players – What You Need to Know

Instant noodle market is dominated by four leading companies

Instant noodle brands launched premium ranges to build a good image

Still room for instant noodles to grow in China

Market Share

Instant noodle market is very consolidated

Figure 16: Value share of top 10 companies in instant noodle market, 2012-14

Competitive Strategies

Instant noodle brands launched premium ranges and charged a higher selling price

Figure 17: Revolutionary instant noodle products from Master Kong and Uni-President, 2014

Nissin ended its collaboration with Jinmailang

Who's Innovating?

Instant noodles

Decline in new launches in 2015

Figure 18: New product launches in the China instant noodle market, by launch types, 2011-15

Convenience-related claims still top the list

Figure 19: Top product claims in the China instant noodle product launch, 2011-15

Figure 20: Selected claims in instant noodle product launches, by country, 2011-15

Opportunities to launch products with organic claim

Figure 21: Examples of instant noodle products with organic claims, Israel and UK, 2014-15

The market looks for more flavour innovations

Figure 22: Top product flavours in China instant noodle product launch, 2011-15

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Examples of instant noodle products focusing on refreshing benefit, Japan, 2015

Packaged noodles

Packaged noodle market is more active in terms of new product launches

Figure 24: New product launches in the China packaged noodle market, by launch types, 2011-15

'No additives/preservatives' ranks as the most popular claim

Figure 25: Top product claims in China packaged noodle product launches, 2011-15

Room for promoting more products with "minus" claims

Figure 26: New packaged noodle products with 'minus' claims, China, 2011-15

Figure 27: 'Minus' claims in packaged noodle product launch, by country, 2011-15

The Consumer – What You Need to Know

Instant noodles becomes a snack for consumers

Safety is the key consideration factor for healthy packaged noodles

Consumers' conservative attitudes limit activity in instant noodle market

Health and taste are the top two product features that consumers would like to pay more for

Preferred Noodles Types

Ramen is the most popular noodles

Figure 28: Noodles types preferred, October 2015

An opportunity to win over young consumers

Figure 29: Noodle types preferred, by age, October 2015

Wealthy people like to try unique noodle types

Figure 30: Noodle types preferred, by monthly household income, October 2015

Region has an impact on consumer eating preferences

Figure 31: Noodles types preferred, by region, October 2015

Occasions of Eating Noodles

Instant noodle becomes a snack for Chinese consumers

Figure 32: Occasions of eating noodles, October 2015

Small packaged instant noodles offer scope to fulfil consumer needs

Figure 33: Share of small packaged instant noodle in total instant noodle launches in China, 2015

Instant noodle market is still led by young consumers Figure 34: Occasions of eating instant noodles, by age, October 2015

An opportunity to promote premium noodle products

Figure 35: Occasions of eating instant noodles, by personal monthly income and household monthly income, October 2015

Preferences when Eating Noodles

Consumers from the north and inland areas are more likely to rely on noodles as staple Figure 36: Preferences towards daily eating habits, by region, October 2015

Demographic differences in noodle preferences

Figure 37: Preferences towards noodle types, October 2015

People like to stock up and make noodles at home

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Preferences towards purchase habits, October 2015

Hot noodles with traditional/local flavours win more consumers

Figure 39: Preferences towards flavours and cooking method, October 2015

Healthy Packaged Noodle Products

Safety is the dominant factor for healthy packaged noodles

Figure 40: Healthy packaged noodle product, October 2015

'Organic' and 'imported' claims are vital to high earners

Consumers want noodles with "minus claims"

Figure 41: Examples of noodle products which have obvious "minus claims" on their package, Japan, South Korea and Taiwan, 2015

Regional differences can influence people's health standard as well

Figure 42: Healthy packaged noodle products, by region, October 2015

Chilled and international noodles have limited impact

Preferences when Eating Instant Noodles

Instant noodles packed in sachets/packs are more welcomed by consumers

Figure 43: Attitudes towards product package, by region, October 2015

Consumers' conservative attitudes limit instant noodle market

Figure 44: Attitudes towards instant noodle brands, by household income, October 2015

Most consumers like to cook instant noodles by boiling them and eat them with personalised side dishes

Figure 45: Attitudes towards cooking instant noodles, October 2015

Factors that Consumers Would be Willing to Pay More for

Health and taste add scope for trading up

Figure 46: Factors that consumers are willing to pay more for, October 2015

Side dishes well placed to fulfil consumer needs

"Organic" and "manufactured by a famous restaurant" are key to charging a premium

Figure 47: Factors that consumers are willing to pay more for, by household income, October 2015

Figure 48: Examples of instant products which are designed to resemble flavours of famous restaurants, Japan, 2014-15

Meet the Mintropolitans

Mintropolitans are more likely to eat Udon

Figure 49: Noodle types preferred, by consumer classification, October 2015

Opportunities for healthy package noodle products

Figure 50: Healthy packaged noodle product, by consumer classification, October 2015

Instant noodles manufactured by famous restaurants have yet to take off Figure 51: Factors that consumers are willing to pay more for, by consumer classification, October 2015

Appendix – Market Size and Forecast

Figure 52: Retail value sales of instant noodles in China, 2010-20

Appendix – Methodology and Abbreviations

Methodology

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Fan chart forecast Mintropolitans Why Mintropolitans? Who are they? Figure 53: Demographic profile of Mintropolitans vs Non-Mintropolitans, by gender, age and personal income Figure 54: Demographic profile of Mintropolitans vs Non-Mintropolitans, by marital status, city tier and education level Abbreviations

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com