

Home Meal Replacement - Canada - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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



"HMR's growth reflects an increase in importance of convenience in how Canadians get/prepare food. This Report explores what foods consumers are more likely to eat and when, and what dayparts prove important. Consumers were asked what they were interested in, reasons for using HMR and experience and expectations."
- Joel Gregoire, Senior Research Analyst – Food & Beverage

This report looks at the following areas:

- Food sources are becoming more fragmented
- Operational challenges impact execution
- Breakfast occasion is under-represented at HMR

For the purposes of this Report, Mintel has used the following definition for HMR:

Prepared/made-to-order foods at a store where you can buy groceries. Stores directly asked about are:

- Grocery store
- Mass merchant (eg Walmart)
- Club store (eg Costco)
- Convenience/drug store
- Other

**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

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

Home Meal Replacement - Canada - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Executive Summary

The issues

Food sources are becoming more fragmented

Figure 1: Agreement with select HMR related statements, August 2017

Operational challenges impact execution

Breakfast occasion is under-represented at HMR

Figure 2: HMR usage, by meal occasion, August 2017

The opportunities

HMR can serve as a showcase for other store departments

Figure 3: Agree "makes me want to explore other areas of the store", August 2017

'Grocerants' address demand for on-premise experiences

Figure 4: HMR usage, take out vs eat in by meal occasion, August 2017

Technology serves as an opportunity to engage younger HMR consumers

Figure 5: Interest in online ordering, by age, August 2017

What it means

The Market – What You Need to Know

Canadians are more time-pressed

Most Canadians live in urban areas

Immigration fuelling Canada's population growth

Market Factors

Canadians are more time-pressed

Most Canadians live in urban areas

Figure 6: Share of Canadians that live in urban and rural areas, 1851-2016

Immigration fuelling Canada's population growth

Figure 7: Foreign-born share of population by G8 country and Australia

Mobile technology enabling unprecedented opportunity to interact

Figure 8: Mobile and smartphone penetration, by age group, May 2017

Key Players – What You Need to Know

HMR is evolving to 'grocerants'

Executing a successful HMR program is challenging

Meal kits compete with foodservice and HMR

What's Working?

**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 |

EMAIL: reports@mintel.com

Home Meal Replacement - Canada - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

HMR is evolving to 'grocerants'

Challenges

Executing a successful HMR program is challenging

What's Next?

Retailers will be expected to integrate technology with in-store experience

Meal kits compete with foodservice and HMR

Tech fuels opportunity for customized meal solutions

Figure 9: Introducing Habit, October 2016

The Consumer – What You Need to Know

The majority of Canadians use HMR

HMR is a solution in a time-pressed society

Chicken rules the roost at HMR

HMR can serve as a means to explore new food offerings

Meal combos offer ease and value

HMR Usage

The majority of Canadians use HMR

Figure 10: HMR usage by retail format, August 2017

HMR proves more popular among young adults

Figure 11: HMR usage, by age, August 2017

Dinner is 'prime-time' for HMR

Figure 12: HMR usage, by meal occasion, August 2017

Figure 13: HMR usage, take out vs eat in, August 2017

Figure 14: HMR usage, take out vs eat in by meal occasion, August 2017

Younger consumers are more likely to eat in when using HMR

Figure 15: HMR eat in (any meal), by age, August 2017

Reasons for Using HMR

Figure 16: Reasons for making purchases from HMR, August 2017

HMR is a solution in a time-pressed society

Figure 17: Use HMR because there's no time to cook, moms vs overall, August 2017

HMR is an on-the-go solution

Figure 18: Use HMR because already shopping at the store, by gender, August 2017

Figure 19: Use HMR because hungry while out, by age group, August 2017

Comparable value is important to a quarter of consumers

Figure 20: Use HMR because it's cheaper versus restaurants, Chinese Canadians vs overall population, August 2017

Figure 21: HMR usage, by perceived financial situation, August 2017

Food selection is not the primary reason for using HMR

Figure 22: Use HMR because need a side dish for a meal being prepared, by age group, August 2017

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 |

EMAIL: reports@mintel.com

Home Meal Replacement - Canada - October 2017

Report Price: £2982.01 | \$3995.00 | €3381.30

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

Menu Assortment

Chicken rules the roost at HMR

Figure 23: Top foods purchased at HMR across any occasion, August 2017

Figure 24: Top foods purchased at HMR across any occasion, by meal, August 2017

Figure 25: Correspondence analysis – Foods purchased, by daypart, August 2017

Younger consumers show higher stated purchase for most foods

Figure 26: Foods purchased at HMR across any occasion, by age group, August 2017

Figure 27: International foods purchased at HMR across any occasion, by region, August 2017

Figure 28: When HMR meals are purchased, Chinese Canadians vs overall population, August 2017

Figure 29: Foods purchased at HMR across any occasion, Chinese Canadians vs overall population, August 2017

Creating an Experience

HMR can be a means to explore new food offerings

Figure 30: "Prepared/made-to-order foods from retailer allow me to try new foods" (% agree), August 2017

HMR can be a conduit to explore the rest of the store

Figure 31: "The section of the store where I get ready and prepared meals makes me want to explore other areas of the store" (% agree), August 2017

'Grocerants' provide an alternative to restaurants

Figure 32: Historical and forecast food sales; at home versus dining out

Innovation Opportunities

Figure 33: Areas of interest related to HMR, August 2017

Figure 34: TURF analysis – Interest, August 2017

Figure 35: Table – TURF analysis – Interest, August 2017

Meal combos offer ease and value

Technology enables convenience and responsiveness

Figure 36: Interest in online ordering, by age, August 2017

Delivery meal kits represent an area of competition for HMR

Figure 37: Interest in delivery, August 2017

Figure 38: Scratch Meals Panang Chicken Curry with Peppers & Bamboo Shoots (UK), February 2017

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Correspondence analysis

TURF analysis

Abbreviations and terms

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 |

EMAIL: reports@mintel.com