

December 2018

## Poultry - US

"Poultry maintained its position as the most widely consumed animal protein with nearly total household penetration. Category sales topped \$26.2 billion in 2018, a modest 2% gain from 2017. The universal appeal of poultry comes from its healthy reputation, versatility, and affordability. With consumer interest in protein at a ...

## 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 ...

## Fruit Juice, Juice Drinks and Smoothies - UK

"That consumers are limiting consumption due to concerns about sugar emphasises the importance of reformulation in juice drinks, and fruit juices and smoothies using their health halo and differentiation to support sales. The latter includes giving more details on ingredients, offering more varieties of blends and targeting different usage occasions ...

## RTD Alcoholic Beverages - US

"RTD (ready-to-drink) alcoholic beverages continue to be an "also drink" alcohol type, trailing behind beer, wine, and spirits in consumption and volume sales. However the category, which includes FMBs (flavored malt beverages), prepared spirits-based cocktails, and wine coolers has seen recent strong innovation, moving it further away from the cloying ...

## White Spirits and RTDs - UK

"The importance that many white spirits buyers place on product details underlines the need for companies to highlight attributes such as ingredient varieties and provenance prominently on pack. Securing good distribution and visibility in the on-trade is also crucial for brands in order to drive retail purchase."

## Foodservice in Retail - US

"Retailers are building out their prepared food programs to be more sophisticated and take direct aim at restaurants, as well as other retailers. They are differentiating with more on-site restaurants, which can range from a well-known quick-service chain to a fast casual restaurant helmed by a celebrity chef. And while ...

## Sugar and Alternative Sweeteners - US

"Sales of sugar and alternative sweeteners continue to fall, as consumers continue to limit their usage and are turning to other, less-sweet options, if not foods/drinks that are sufficiently flavored as-is. Sales in the honey segment are one category bright spot. Honey brands are benefiting as well as leveraging ...

## White Spirits - US

"The white spirits market is growing, albeit at a slower rate than dark spirits. Consumer interest in white spirits is growing as evident by the strong growth of tequila and higher-end/super premium gin brands. However, the trendiness of tequila and gin have not yet crossed into mass market appeal ...

## Seniors and Health - US

"The number of Seniors, adults aged 65+, is on the rise. By 2023, the US population of Seniors will be 61.6 million strong, accounting for 23.2% of the total US population – up from 20.6% in 2018. Today's Seniors express a positive, realistic attitude toward health. Focusing ...

## 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

## Food and Drink - International

– Alice ...

economy, operators need to find ways of holding up demand as consumers are ...

### Beer - UK

"Consumers' desires to lead healthier lifestyles is evident, this feeding through to the trend towards people reducing/limiting alcohol intake. Given the strong consumer perception that low-/no-alcohol beers allow you to drink more beer, there is scope for such variants to forge a role as the permissible face of ...

### Dining Out in 2019 - US

"The restaurant industry is expected to maintain strong growth in 2019 thanks to positive economic conditions and increased incremental sales across segments fueled by a demand for off-premise dining. Dining out is a favorite activity for Americans and personal as diners have an increasing desire to form a connection with ...

### 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 ...

### Food and Drink Shopper - US

"Big stock-up trips at traditional supermarkets are still happening, but especially among younger food and drink shoppers they're giving way to smaller quick-fill trips across a wider array of retail outlets. This new generation of shoppers is also less likely to make a list and more likely to make purchase ...

### Coffee Shops - UK

"With four in five coffee drinkers wanting to customise their drink, shops that offer create-your-own options will thrive in today's challenging high street conditions. But it's not just customisation that's important. Whether it's becoming destinations for work, socialising and convenience, focusing on sustainable schemes or meeting health goals, coffee shops ...

## 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 ...

### Weight Management - US

"More than 206 million adults in the US are currently managing their weight. While the audience is sizeable, the challenge for industry players is that the majority are following a self-guided approach to weight management. This could point to why the obesity rates continue to rise. Trends toward body acceptance ...

### Fish and Shellfish - US

"The \$18 billion fish and shellfish category enjoys widespread consumer participation but still lags behind other more "every day" proteins. Sales increased 13% in the past five years, driven by growing commodity prices

### Wine - US

"Total US dollar sales of wine should reach \$62 billion in 2018, for overall growth of 15% since 2013. The growth rate has slowed since a 4.2% bump in 2015, settling to a more moderate 1-2% annual growth

## Food and Drink - International

and consumer interest in healthy, high-protein foods. A healthy reputation is one clear advantage that fish and ...

projected through 2023. Wine growth has outpaced total alcohol, while wine ...

### 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 ...

### 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 ...

### Dark Spirits - US

"The dark spirits market continues to thrive due primarily to the strong growth of American whiskey. Consumer interest in craft products as well as changes in drinking habits and preferences have benefited many dark spirit brands, especially super- premium brands. Dark spirit drinkers tend to be enthusiastic about dark spirits ...

### Foodservice Online Ordering and Delivery - US

"Restaurant delivery and carry out continue to be a bright spot for the foodservice industry with use being driven by consumers across generations looking for convenience and younger consumers looking to relax at home. The majority of consumers still prefer to order directly from restaurants, but interest in third party ...

### Dining Out Dayparts - US

"Restaurants are facing increased daypart competition from retailers as well as a decline in traffic overall, but particularly for the three traditional dayparts. To combat growing threats, foodservice operators will need to leverage more on-demand dining and nontraditional dayparts, and target young people, who are the biggest consumers of both ...

### 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 ...

### Pizza and Italian Restaurants - UK

"Consumers' desire to cook pizza or Italian food at home as well as the rise of "more adventurous cuisines" is forcing operators to innovate with menu choices and retail formats in order to maintain demand. While the spate of emerging pizza or Italian fads looks to have potential to retain ...

### Processed Poultry and Red Meat Main Meal Components - UK

"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

## Food and Drink - International

### Still, Sparkling and Fortified Wine - UK

"In a market where many shoppers are focused on buying what is on special offer and consumers typically drink from a narrow repertoire of wine types, wine festivals can help to prompt people to buy more wine and encourage greater experimentation. These should include samplings and suggestions on wines people ...

### Grocery Multiples: Reconfiguring the Non-food Offer - UK

"Over the past five years pressure has been placed on the supermarket sector in the UK, with the rise of discounters, online and convenience stores taking away a traditional dependence on the larger store format. As such the traditional big four have had to readjust the formats of their larger ...

### Attitudes to Low/No/Reduced Sugar Soft Drinks - UK

"The public spotlight on soft drinks has ensured that most users claim to try to make healthy choices at least most of the time. However, this typically stops at checking the added-sugar credentials of drinks, very few people scrutinising their ingredients or nutrition details. This puts the onus on healthier ...

### Pizza - US

"While sales growth has been minimal for retail pizza, a strong uptick in 2018 provides an indication of the growth potential of the category. Continued improvements in flavor variety, quality, and healthfulness will help marketers and retailers take advantage of frozen and refrigerated pizza's unique combination of convenience and fun ...

### Gluten-free Foods - US

"Despite a decline in the number of gluten-free consumers, there is a generally positive opinion of gluten-free foods. Consumers consider the claim to indicate the product is healthy and beneficial to all, not solely those who have celiac disease or a gluten intolerance. The challenge for the category is in ...

### Beer and Craft Beer - US

"Dollar sales of beer, craft beer, and cider are estimated to reach \$112 billion in 2018, up 1.1% over 2017 totals. Dollar sales of beer will level, with very small year-over-year gains projected through 2023. Volume sales are declining at a higher rate (with an estimated dip of just ...

### 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 ...

### Flavor Innovation on the Menu - US

"American diners now have access to an expansive range of flavors, dishes, and cuisines, reflective of the diverse and highly competitive foodservice market. However, while the most adventurous embrace innovative, trendy, and international flavors, the majority still tend to stick with familiar fare, at least most of the time. Opportunity ...

### Yogurt and Yogurt Drinks - US

"Total sales of yogurt are flat; consumers are trying new yogurt styles and brands but not increasing their total yogurt consumption. While sales of drinkable yogurt are quickly growing they have not offset the decline of spoonable yogurt. Moreover, drinkable yogurts are likely cannibalizing sales of spoonable. High protein/low ...

### Consumers and the Economic Outlook - US

"The economy continues its slow and steady recovery, though economists are hesitant to say that it has officially recovered. While some consumers may be watching economic indicators, many are not, and even those who are may not see the direct effects on their daily lives. Overall, if consumers were already ...

### Restaurant Decision Making Process - US

"Restaurant industry sales are expected to grow in coming years as positive economic conditions spur increased consumer spending on AFH (away from home) dining. However, with consumers having more choices of where to dine, restaurants must emphasize convenience to capture dining dollars. In addition, operators must offer more than quality ...

### Cooking Enthusiasts - US

"The share of the population identified as Cooking Enthusiasts has remained stable over the last three years, providing a solid base of consumers who cook at home regularly and enjoy it. However, enthusiasm among other segments is on the decline, as less of the population is defined as Conflicted Cooks ...

### Hot and Cold Cereal - US

"The \$10.4 billion cereal category continues to be plagued with struggles, largely an impact of falling cold cereal segment sales. Yet, the category still enjoys nearly universal participation, suggesting that any attrition is in consumption frequency or volume, not overall category participation. Frequency can be strengthened though, by accentuating ...

### Marketing to Moms - US

"The competition among brands to get moms' attention is fierce. Only a small share of moms say they have the money to pay for everything their kids want to do, meaning brands have to put in a lot of effort to make it to the top of moms' list. One ...