

**February 2017**

## **Accounting and Financial Management - UK**

"Consultancy will continue to represent the strongest growth potential for accountancy firms, with digital technology and data analytics expected to become an even bigger part of the consulting market. While Brexit-induced uncertainty is likely to negatively impact the market, it will also present opportunities for accountants to provide advisory services ...

## **Attitudes towards Healthy Eating - UK**

"Social media carries the pulse on which the digital generation keep their fingers to keep one step ahead with emerging health trends and ingredients. As such, it is an ideal platform for food companies to identify innovation opportunities – although with a need to cut through all the noise in ...

## **Baby Food & Drink - All Regions**

Mintel's Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## **Beauty & Personal Care - Ireland**

"Mass market brands continue to dominate the beauty and personal care market however the rise in non-specialised retailers signals scope for growth of premium own-label brands in 2017. In terms of new product development the increased prevalence of allergies and lifestyle-related skin complaints highlights opportunities for brands that boast 'dermatologically ...

## **Beer - All Regions**

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## **Activities of Toddlers and Preschoolers - US**

"Parents are continually confronted with new and different ways to engage with their children: parenting apps help track and advise; digital content offers the possibility of cognitive development; and animated books bring kids' stories to life on a tablet. However, despite digital innovations, parents still lean on traditional activities to ...

## **Attitudes towards Low- and Non-alcoholic Drink - UK**

"Consumers have been cutting back on the amount of alcohol they drink for financial and health reasons and this presents a big opportunity for low-alcohol and non-alcoholic/alcohol-free beers, ciders and wines. Negative taste perceptions, low product visibility and limited promotional support are still holding the market back from realising ...

## **Beach Holidays - UK**

"It is still unclear how Brexit negotiations will affect the overseas holiday market. However, because beach breaks tend to be longer summer holidays, it is likely that sizeable proportion of consumers will cut back on short city breaks in the low seasons before they forgo their main beach break in ...

## **Beauty Retailing - China**

"Online shopping is supporting the growth of the beauty retailing market and compensating for stagnating offline sales. Concern about product authenticity does not prohibit consumers from looking for products online, even for premium products, because the wide selection of imported products and competitive prices in online stores are still strong ...

## **Beer, Craft Beer and Ciders - Canada**

"While beer remains far and away the most popular alcoholic beverage in Canada, the ground is shifting. As competitive pressures mount, brewers need to have their finger on the pulse when it comes to what



Canadians are drinking, what's important to them when selecting the beers or ciders and areas ...

## Beverage Blurring - US

"Two thirds of US adults have consumed any of the hybrid drinks measured in this Report. Bottled water with added health benefits (eg protein, vitamins) leads consumption, followed by carbonated juice, and bottled water with added functional benefit. The strongest limitation to adoption is perceived high price but they encourage ...

## Bottled Water - All Regions

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## Breakfast Cereals - All Regions

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## Carbonated Soft Drinks - All Regions

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## Cheese - All Regions

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## Children's Eating Habits - Ireland

## Biscuits, Cookies & Crackers - All Regions

Mintel's Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## Bread, Bakery & Cakes - All Regions

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## Butter, Yellow Fats & Oils - All Regions

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## Cereal, Snack & Energy Bars - All Regions

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## Children's Clothing - US

This report will help you to uncover opportunities and understand the key issues affecting your market. How? By giving you instant access to analysis and critical recommendations. It will also challenge routine thinking by providing fresh, new perspectives that energizes your thought processes.

## Children's Social Care - UK

“Parents consider regular exercise as the most important step to improving children’s health and diet. This reflects the increasingly sedentary lifestyles of children and with technology a significant contributor to this, utilising bloggers, vloggers and YouTube channels, for example, can help brands to encourage children to take more exercise and ...

## **Chips and Dips - US**

"Both chips and dips have performed well in recent years, boosted by consumer interest in snacking, a variety of innovative flavors and formats, and the category’s status as a permissible indulgence. New tastes and experiences will continue to drive sales in coming years, along with a greater emphasis on premium ...

## **Chocolate Confectionery - Brazil**

“Declining volume sales in chocolate confectionery show the continuing need for brands to use innovation to encourage consumers back into eating. Messages should focus on trying new products, flavors, and formats. They could have the “treat” factor attached to them, as many people eat chocolate to treat themselves. Keeping prices ...

## **Christmas Shopping Habits - UK**

“It was a great Christmas, better than anyone expected. But the more one looks at the performance, the more one feels that there are warning signs. We think that people are worried about rising prices in 2017 and that they pulled spending forward for that reason. We think they are ...

## **Consumer Attitudes towards Financial Services Innovation - UK**

“Open APIs have the potential to transform the financial services sector, with providers given greater opportunity to win new customers using personalised products and messaging. Customisation and security are the main two areas for banks to address. Consumers will demand control over their data and additional security measures in order ...

## **Cooking Sauces, Pasta Sauces & Stock - All Regions**

“The fragmented allocation of funding for parental and family support services, the majority of which comes via targeted, time-limited central government grants and not core LA budgets, makes strategic planning difficult and raises doubts over the long-term sustainability of running such services. This provides further difficulties for both commissioners and ...

## **Chocolate - Brazil**

"A queda das vendas em volume na categoria de chocolate mostra a necessidade constante das marcas apostarem em inovação para incentivar os brasileiros a continuar consumindo chocolate. As mensagens devem ser centradas na experimentação de novos produtos, sabores e formatos, com ênfase no fator ‘agrado pessoal’, já que muitas pessoas ...

## **Chocolate Confectionery - All Regions**

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## **Coffee - All Regions**

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## **Consumers and Credit Risk - UK**

“The changing demographic profile of the UK highlights the growing need for more non-mainstream lending products. However, despite positive signs of engagement, there is a disconnect between how confident people feel about being able to access credit, and the likelihood that they are trying to improve their credit score.”

## **Credit Unions and Retail Banking - Canada**

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## Dairy Drinks - All Regions

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## Electrical Goods Retailing - France

"Spending on electricals in France has been in decline for the last five years, but the three largest specialist retail groups have been growing strongly. The market has been transformed by online shopping, but the store-based specialists have generally kept up with the pure-players. The market is undergoing significant structural ...

## Electrical Goods Retailing - Italy

"With the vast majority of purchases taking place in-store, and given the value Italian consumers put on first-hand product experience and sales support, the electrical specialists still account for the largest share of consumer spend on electrical goods. However, our consumer research for this report identifies Amazon as the single ...

## Electrical Goods Retailing - UK

"Rather than the usual deflation seen in the price of electrical goods, retailers are going to have to decide how to tackle rising prices in 2017 due to the devaluation of Sterling. Whilst this is clearly a challenge the bigger issue will be if wider consumer demand slows due to ...

## European Retail Briefing - Europe

**This month ERB includes:**

"Family relationships are an influential factor behind choice of first bank so incentivizing parents to open accounts for their children is a sound strategy."

## Electrical Goods Retailing - Europe

"The days when the electricals sector was seen as a boom area are long gone. White goods and most brown goods are now bought mostly on a replacement basis – there is too little product innovation to accelerate the process. Where there is development, as with curved TV screens or ...

## Electrical Goods Retailing - Germany

"German consumers across all ages are now completely at ease with shopping for electrical goods both online and in-store simultaneously allowing the market leader, Media-Saturn, to return to growth. The challenge for smaller specialists is finding a way to differentiate themselves in a sector where consumer spending has continued to ...

## Electrical Goods Retailing - Spain

"Consumer confidence is recovering in Spain and spending on discretionary products continues to rise. However, the specialist electrical retailers are losing share of the electrical goods market. Leading specialist, Media Markt's strong performance continues to contrast the overall trend, driven by the retailer's continued investment in both in-store and online ...

## Emerging Science - All Regions

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## Fast Casual Restaurants - US

"With a lot of restaurant segments shifting away from some of their core foundational features, fast casuals

## First Aid - US

The first aid category is experiencing flat sales in 2016 due to declines in foot care and an overall value-driven mindset among consumers. Future growth is projected to be modest as consumers continue to seek out products that provide value, durability, and functionality, and a shopping experience that is transactional ...

## Food Storage and Trash Bags - US

"Food storage and trash bag products experienced flat sales in 2016, benefiting from consumers' reliance on food storage products and trash bags for household food prep and food disposal needs. However, due to the highly functional nature of the category, brands are challenged with boosting incremental sales. Going forward, promoting ...

## Greece Outbound - Greece

"The desire to travel overseas is high among Greek citizens who enjoy holidaying and visiting friends and family when abroad. Greeks are typically independent travellers who enjoy organising their own trips abroad."

- **Jessica Kelly, Senior Tourism Analyst**

## Hispanics' Snacking Preferences - US

"Practically all Hispanic households consume snacks. However, they consume a wider variety of snacks as they become acculturated, resulting in snacking habits, preferences, and motivations for consumption becoming increasingly complex. Since less-aculturated Hispanics gravitate toward fewer types of snacks, there are opportunities for brands to connect with Hispanics as they ...

## Holidays to Spain - UK

continue to find success by focusing on quality ingredients and premium dishes in a convenient, affordable setting. However, with new segments, from retail to food halls, providing competition as well as opportunities, fast ...

## Food Safety, Regulations & Labeling - All Regions

Mintel's Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## Fruit & Vegetables - All Regions

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## Haitao Shopping - China

"Despite rapid growth, the Haitao market is expected to peak soon within China's overall online retail market. More foreign brands are establishing local online presence, while Haitao is more important for market newcomers to make a name for themselves. As more foreign brands crowd the market, retailers and brands have ...

## Hobbies and Interests - UK

"The activities that Brits are choosing to do in their spare time seem to, in some instances, mirror a trend for cutting back with low-cost gyms more popular than ever and a huge increase in participation in hobbies which involve minimal outlay such as baking and knitting."

— **Helen ...**

## Household Paper Products - UK

“Mintel’s consumer research shows that greater product diversification would not only be in accordance with Spanish tourism’s long-term goals, but would also meet rising demand for the ‘Real Spain’ and generate new, higher margin, commercial opportunities.”

– John Worthington, Senior Analyst

## Ice Cream - All Regions

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## Ingredients & Additives - All Regions

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## Juice & Juice Drinks - All Regions

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## Major Appliances - Canada

"Major appliance brands operating in Canada are facing a changing environment of evolving preferences and consumer demand. Manufacturers will need to address cost-sensitivities as the majority of consumers are influenced by price. This may translate to more entry-level devices with less features or more compact design."

## Marketing to Men - UK

“Marketing aimed at men continues to be heavily focused on high-achieving sportsmen and well-groomed male models, offering the brands behind them little differentiation in the minds of those they are targeting.

“Purchasing household paper products tends to be a habitual process, meaning that brands need to work to break habits in order to increase sales. There are consumer concerns about the environment in this category, suggesting that there may be scope to increase interest in recycled or alternative fibres. However, brands ...

## Income Protection - UK

“The need for workers to formally protect income is apparent, and yet the income protection gap is yawning. Many workers simply avoid trying to understand their financial resilience and their financial planning suffers as a result. Providers may be able to increase sales through group policies and by exploring the ...

## Investment Trends - US

"The investment world is being buffeted by several disruptive trends. One is the rise of robo-advisers, which provide algorithm-based investment advice without the help of humans. These allow lower minimum balances, have lower trading costs, and often even offer access to humans. Demographics are also forcing changes, as Baby Boomers ...

## Low-cost Carriers in Asia - Asia

“While China offers the greatest potential for LCC development in Asia, protectionism and regulatory constraints remain a major impediment for LCCs that operate in the market.”

## Major Household Appliances - US

"Innovation in the category and a healthy housing market has led to continued sales momentum in major household appliances. Mid-range brands have the highest current ownership among respondents, while higher-end brands have elevated ownership among young adults and higher earners. Replacement is the leading driver for appliance purchases, but appliances ...

## Marketing to Millennials - Canada

In Canada, 18-34s represent close to one-quarter (23%) of the population. An open-minded segment, they have a strong sense of individuality with an optimistic outlook, of the belief that they have the power to impact change



This paves the way for brands to take a different approach in their campaigns, such as featuring role models ...

## Marketing to Over-55s - China

“Three misconceptions about senior consumers: assuming they tend to live the old fashioned way and thus think less about improvement and would pay more for premium or advanced product features just because they can afford and not recognising the diversity of the senior consumers in terms of their values and ...

## Meat, Fish & Poultry - All Regions

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## Menu Flavours - UK

“The spectacle of freshly prepared food gives people additional reasons to visit a restaurant, given the frugal mindsets of today’s consumer. In terms of flavours, diners want to see more ethnic flavours injected into familiar dishes. When it comes to grab-and-go lunch options, diners seek a wider range of hot ...

## Mobile Phones - China

“In the saturating mobile phone market, replacement purchase is the key driver as consumers show the potential to trade up. This is especially the case for lower tier cities and rural areas. Brands should focus on offering outstanding premium phones and also pay attention to developing offline retail channels to ...

## Nutrition, Health, Vitamins & Supplements - All Regions

Mintel’s Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market

in the world. They feel understood by marketers, though not well represented in ads ...

## Marketing to Women - UK

“There is a temptation for many marketers to view women as ‘mothers’ or ‘mums-to-be’, but more diverse lifestyles mean that starting a family is not as strong an aspiration for today’s young women as it once was. Brands could therefore benefit from meeting demands for strong, independent female role models ...

## Men's and Women's Beauty and Grooming Routines - UK

“Appearance is so crucial to confidence that today’s adults aim to conduct the vast majority of their beauty and grooming tasks before facing the day ahead. However, busy lifestyles are taking their toll, which could spell trouble for products that require a greater level of time commitment. Harnessing the potential ...

## Mobile Gaming - UK

“Although growth in mobile gaming revenue is expected to continue in 2017, opportunities for developers to enter the market are limited without a significant marketing spend, or the perfect storm of novel but accessible gameplay and familiar IP that Pokémon Go had.”

– Mark Flowers, Consumer Technology Analyst

## National Newspapers - UK

“Heightened controversy over the spread of fake news and misinformation in 2016 has presented established national newspaper brands with an opportunity to reaffirm to the public the important role they play in terms of offering reliable journalism.”

– Rebecca McGrath, Senior Media Analyst

## Optical Goods Retailing - UK

“Concentration of the retail sector has continued and major suppliers have moved into online selling. The largest retailer, Specsavers, has continued to build market share, thanks to the expansion of the chain, as

overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## Outdoor Entertaining - US

"A desire to socialize, coupled with enjoyment for hosting others motivates 71% of adults with outdoor space to entertain guests outdoors. Growth in adjacent markets such as outdoor furniture and grills bodes well for the future of outdoor entertaining since the vast majority of outdoor entertainers prefer hosting informal events ...

## Pasta, Rice & Noodles - All Regions

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## Pet Food - All Regions

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## Plant Protein Drinks - China

"Expanding consumption occasions is the key for PPDs' future development. Usage of PPD can be expanded to different times of the day beyond breakfast only, while different types of PPDs beyond the traditional types such as soy or walnut drinks can also be explored and developed. Promoting PPDs consumption as ...

## Private Label Food and Drink Trends - US

"Private label food and drinks category sales declined by -2.2% from 2015-16 and are forecasted to continue to decline into 2021. Increased confidence in the economy may lead many consumers to opt for name brands over store brands, especially for products located in the brand-centric center store area. Opportunities ...

well as the addition of related services such as domiciliary and hearing services. In its latest move ...

## Packaged Red Meat - US

"Sales of red meat tumbled in 2016 as a convergence of factors negatively impacted the category. Commodity prices remain at their lowest levels in years, and while consumers indicate they are still eating red meat, there has been a pronounced reduction in their frequency of consumption. Health, environmental, and even ...

## Pasta, Rice and Noodles - UK

"Health concerns over carbohydrate intake continue to plague the category. However, NPD centred on 'positive nutrition' and tapping into the ongoing interest in gluten-free food should help to polish its image. Demand for convenient mealtime solutions should continue to benefit the category even as the rising costs of imports threaten ...

## Pizza - All Regions

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## Prepared Meals & Meal Centres - All Regions

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## Recycling - UK

"The UK recycling industry looks set to undergo an uncertain number of years due to recent stagnation in household recycling rates - the first decline since the millennium - compounded by the recent Brexit vote and ongoing climate of austerity."

— Marco Amasanti, B2B Analyst



## Retail Banking and Credit Unions - US

There are few industries that reach as many consumers across the US like financial services do. Nearly 100% of American consumers currently own some sort of financial account at a retail bank or credit union and are affected by the proliferation of financial technology, products, and trends. The total number ...

## Salty Snacks - All Regions

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## Soap, Bath and Shower Products - UK

"The soap, bath and shower market continues to be hindered by decreasing product usage, with competitive pricing strategies having a greater influence than new product innovations. There are, however, opportunities in the market to encourage trading up, such as focusing on lifestyle trends to promote the emotional and functional benefits ...

## Soup - All Regions

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## Sports & Energy Drinks - All Regions

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## Sweet & Savoury Spreads - All Regions

## Ride Sharing and Alternate Transportation - US

"Ride sharing services as an industry is a relatively recent innovation which has exploded in use and popularity in recent years. Ride sharing services have popped up across the globe, available now in practically every major metropolitan area. Due to advances in smartphone technology and capabilities, ride sharing has allowed ...

## Snacking Preferences of Black Consumers - US

Blacks love to eat snacks. Snacks can fill an emotional void or be a means to incorporate better eating habits into their diets. Black women with kids are the primary decision maker when it comes to buying snacks, since she is doing so as part of her regular grocery shopping ...

## Software - UK

"By far the most significant disruption to the growth of the software market has arisen from the migration of computing to the cloud and the use of software-as-a-service rather than a capital purchase. Nonetheless, the constant evolution of software capability and availability, combined with long-term trends surrounding mobility, big data ...

## Spirits & RTDs - All Regions

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## Sugar & Gum Confectionery - All Regions

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## Table Sauces, Seasonings & Sweeteners - All Regions

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## Tea, Malt & Other Hot Drinks - All Regions

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## The Millennial Beauty Consumer - US

"Millennial women are highly engaged in their beauty routines, using a broad variety of products, spending more time than average on their appearance, and reporting strong skill levels and frequent experimentation. Interactive shopping experiences and YouTube tutorials provide avenues for reaching this tech-savvy generation, while advertising themes that focus on ...

## Travel and Tourism - Ethiopia

"Ethiopia's outstanding natural beauty, dramatic landscapes and extraordinarily diverse ancient culture dating back more than 3,000 years has contributed to astonishing tourism growth over the past decade. As one of Lonely Planet's designated countries awarded 'Best in Travel 2017', the country is increasingly becoming an adventure destination of choice ...

## Travel and Tourism - Saudi Arabia

"Saudi Arabia is one of the world's leading destinations for religious tourism and every year 20 million people visit Makkah, Islam's most holy city, and 2 million make the pilgrimage for Hajj to pray at the religion's most holy site, the Ka'ba in the Holy Mosque. Tourism has been identified ...

## Travel and Tourism - Tunisia

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## Television Advertising - US

"Twenty years after the launch of Netflix, and more than a decade since the launch of YouTube, advertisers continue to increase spending on television commercials, with sales estimated at \$81 billion in 2016. Growth continues because the television commercial remains the pièce de résistance for product introductions and brand equity ...

## Toy Retailing - UK

"In an increasingly competitive toy market, toy specialists need to do all they can to stand out from generalists. Given that almost two fifths of shoppers have visited a store before buying a toy and parents view shopping trips as a way of bonding with their kids, there are more ...

## Travel and Tourism - Gambia

"A well-established exotic-package destination offering sun, sea and sand close to Europe, the 'jewel' of West Africa is also a birdwatching favourite, with eco- and community tourism developing around the Gambia River."

- Jessica Kelly, Senior Tourism Analyst

## Travel and Tourism - South Africa

"South Africa has an impressively varied tourism product thanks largely to a geological diversity that incorporates everything from white-sand beaches and vaulting sand dunes to majestic mountains and vast open spaces like the Kalahari Desert and the Great Karoo. It is one of the most biodiverse countries on the planet ...

## Travel and Tourism - United Arab Emirates

“The number of Russian tourists to Tunisia has grown six-fold to around 600,000 but there is still enough room for the Brits. We hope that there will be at least a partial relaxation of the travel ban for UK citizens. Our economy needs hard currencies like the Pound, the ...

## Travel Insurance - UK

“Travel insurers face a number of key challenges. One of the most important is cost control, against a backdrop of intense price competition and slow market growth. Containing costs has become even more important recently, as a result of higher foreign medical bills linked to a weaker Sterling. At the ...

## UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month, we look at Clothing retailing.

**This review looks at:**

## Wine - Ireland

“With consumers still experiencing anxiety in the wake of the Brexit vote and political turmoil in 2016, confidence remains low, affecting the willingness of Irish consumers to drink wine outside of the home. Moving forward into 2017, consumers are likely to remain reserved with their spending on wine slowing down ...

## 手机 - China

“在饱和的手机市场，随着消费者展示出消费升级的潜力，换机购买成为主要的市场推动因素。在低线城市和农村地区尤其如此。品牌应该专注出类拔萃的高端手机，同时也要注重线下零售渠道的发展以取胜低线市场。”

## 海淘 - China

“If you look at what’s happened to airlines, clothing, to supermarket building, it is splitting across most markets between the top end and the budget sector, with the mid-market getting squeezed and I think exactly the same thing will take place in the Middle East. I genuinely think that the ...

## UK Car Review - UK

“The UK car market continues to develop and evolve. Sales are put above 10 million units for the first time in 2016 evidence of the continuing popularity of car ownership. Within the market, buyers are increasingly looking for vehicles that match their lifestyles with compact, multi-purpose and executive models currently ...

## Wine - All Regions

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## Yogurts & Desserts - All Regions

Mintel’s Annual Overviews take a look back at 2016 and provide a detailed overview of the key issues faced by key categories through the year. Including; a full market overview, an in-depth review of the big stories from the year as well as our forecast for the future of these ...

## 植物蛋白饮料 - China

“拓展消费场合是植物蛋白饮料未来发展的关键。除了早餐，植物蛋白饮料的饮用场合可延伸到一天中的不同时段，而厂商或品牌还可探索开发大豆或核桃等传统饮料之外的其他不同类型的植物蛋白饮料。将植物蛋白饮料打造成健康生活的一部分可能会为日益放缓的当前市场增添一种营销新触角，并有效吸引非饮用者。除了包装设计，儿童植物蛋白饮料还应在功效性和营养方面提升吸引力。”

— 李蕾，研究分析师

## 美容零售 - China

“尽管增长迅猛，但海淘市场在中国整体在线零售市场中的占比预计不久将触及峰值。更多的外国品牌都进行了本土线上布局，海淘因而对于市场新晋竞争者扩大知名度有着更重大的意义。随着更多的外国品牌挤入市场，零售商和品牌在向购物者进行营销时必须更加锐意创新，借用视频、在线竞赛游戏和特别事件为消费者带来更尽享的体验。同时，由于中国在线购物者经验更丰富、出国旅行增多、对优质客户服务的要求更高，他们也迫使外国品牌和零售商不断推陈出新，以别出心裁的方式让其保持兴奋期待。”

“网购的蓬勃发展推动了美容零售市场的增长，并弥补了趋于停滞的线下实体店的销售。担心买到假冒伪劣商品并不会阻碍消费者在线上购买美容产品，甚至高端美容产品，因为种类丰富的进口产品价格优势仍然是驱动消费者选择电商渠道的强有力因素。”

## 针对55岁以上人群的营销 - China

“人们对中老年消费者有三大误解：其一，认为他们生活方式过时老土，因此也不会思考如何改善；其二，认为他们愿意购买高级的或者更先进的产品，仅仅是因为他们有足够的财力；其三，未能认识到他们价值观和生活追求的多样性。”