

### January 2016

#### Contract Catering - UK

"Contract caterers are displaying varied performances dependent on individual market conditions. Many are, however, looking to make further internal cost savings to help buoy profits and improve competitiveness to gain further contracts. In this environment, companies can benefit from differentiating their food offer with brands and menus inspired by retail ...

### December 2015

#### Consumers and the Economic Outlook: Quarterly Update - UK

"Mintel's key measures of consumer confidence show that people are still wary. Although the improvements in sentiment that accompanied the end of the income squeeze have been sustained, 2015 has been a year of consolidation, rather than one of soaring consumer spirits. Earlier in the year, the election added ...

#### RTD Alcoholic Beverages - US

"RTD (ready-to-drink) alcoholic beverages are in a time of transition, and, as such, are seeing both ups and downs. FMBs (flavored malt beverages) experienced strong volume sales growth of 57% from 2010-15, due to a Millennial consumer base with a bit of a sweet tooth, as well as to innovation ...

#### Fish and Shellfish - UK

"That fish is rarely seen as versatile is holding the market back from capitalising fully on the scratch cooking trend. Encouraging, however, is consumers' interest in more recipe suggestions for oily fish and for using fish in ethnic-style dishes, highlighting recipe inspiration as a route to driving more experimentation in ...

#### Condiments, Dressings and Seasonings - UK

#### Brand Loyalty in Food - Ireland

"When looking at the Irish market as a whole, consumers show a slightly stronger preference towards brands when it comes to indulgence items such as chocolate, spreads and alcohol. With staple foods (eg fruit and vegetables) however, consumers appear to have no preference or lean more towards own-label."

– ...

#### Sugar and Gum Confectionery - UK

"While the impact of the sugar debate on the sugar confectionary market has so far been limited, the public focus on sugar continues to pose a threat. Consumers' openness to sugar-free variants and positive views of alternatives to refined sugar suggests these as potential areas to explore."

– Anita ...

#### Coffee Shops - UK

"The out-of-home hot drinks market continues to attract attention from non-specialists, putting pressure on specialist coffee shop operators to offer a point of difference. As such, the larger specialist players are refreshing their offer with a renewed focus on food, technology and store formats in order to increase their competitive ...

#### Beer - UK

## Food and Drink - International

"There is scope for growth in the table sauces and seasonings market by appealing to the increasingly varied tastes of UK consumers, namely interest in food trends such as American-style (eg barbecue sauce) and ethnic cuisines.

With changing consumer eating habits driving growth in less traditional segments of thin sauces ...

### Cooking and Pasta Sauces, Marinades - US

"Sales in the total cooking sauces, pasta sauces, and marinades category have been growing and are expected to continue growing. Marinades, the smallest segment, had the strongest gains and drove category growth, likely due to new launches of convenient, versatile products, as well as increasing interest in cooking at home."

### The Budget Shopper - US

"Several years after the recession, the economy is stronger, and people are beginning to work, to buy and to live more freely again. Unfortunately for retailers looking to make a profit, consumers' expectations for fair prices have not waned."

### Coffee Houses and Tea Shops - US

"Coffee remains one of America's most popular beverages and the influence of coffee houses are still growing. These chains are using more technology than ever before, testing the delivery waters, and are adopting some of the practices of the third wave coffee chains. While still coffee dominates, tea has slowing ...

### Innovations in Soft Drinks - Ireland

"The soft drinks industry has seen a period of strong innovation, with low-calorie and sugar trends helping to drive the market. Moving forward, with more pressure being exerted on the industry over the sugar content of some drinks, this will likely see companies doing more to reformulate their products to ...

### Fruit Juice, Juice Drinks and Smoothies - UK

"That only 29% of beer drinkers are prepared to spend more than £4 per pint reflects the enduring price-sensitivity of the out-of-home beer market."

### Dark Spirits - US

"Growth has been small but consistent year-over-year from 2011 to 2015 (est). Overall sales are expected to continue gradually upward at a similar pace, as dark spirits add some growth through trending consumer interest – particularly the straight and Irish whiskey and brandy segments – while white spirits see small ...

### Condiments and Dressings - US

"Both the condiments and dressings categories have struggled to grow sales in recent years, impacted by competition from other categories including dips and sauces, and minimal innovation overall."

### White Spirits and RTDs - UK

"Brands innovating with flavour should focus on the premium tier and try to resist gimmicky variants such as those which have harmed the flavoured vodka category in the US."

– Chris Wisson, Senior Drinks Analyst

### Ready Meals - Ireland

"Times are tough for the ready meals market in Ireland, with consumers still fearful from the 2013 horsemeat scandal, coupled with the growing trend amongst Irish consumers towards scratch cooking. Going forward, the ready meals market is expected to witness 2.2% growth in 2015"

"Concerns around sugar are affecting the fruit juice, juice drinks and smoothies market. 36% of those buying less/not buying do so because of concerns over sugar content. Boding well for NPD is that 40% are interested in variants with reduced sugar and no sweeteners, and 24% in reduced sugar ...

### November 2015

#### Pizza and Pasta Restaurants - UK

"Discounting continues to be a double-edged sword for this market. Whilst it remains a key venue differentiator, the expectation of promotions is hindering players' ability to capitalise on the improving economic climate. The cut-price image sees consumers look to more exciting eating out options."

#### Supermarkets - UK

"The grocery superstores are losing market share and the main focus of this report is to examine why. We think that there are underlying socio-economic changes taking place which allied to the growth of the hard discounters, Aldi and Lidl, is leading to growth in more frequent shopping trips and ...

#### Cooking Enthusiasts - US

"Although the share of Cooking Enthusiasts is stable in 2015 versus 2014, the drop from 2013 indicates a longer-term trend which is also reflected in slight declines in the proportion of people who say they cook three or more times per week."

#### Grocery Retailing - US

"Retailers across channels are battling for a share of wallets and cash registers, creating what might be the most "crowded" segment in retail. Consumers are enjoying these options and fulfilling their grocery shopping needs by bouncing around to multiple stores that most definitely include nonsupermarkets."

#### Soup - US

#### Private Label Food and Non-alcoholic Drink - UK

"That three in 10 shoppers would like to have a say in new products being added to own-label ranges, indicates this an a valuable route for own-brands to canvas the opinions of shoppers whilst also helping to build engagement and loyalty."

#### Juice, Juice Drinks and Smoothies - US

"Total US retail sales of 100% juice, juice drinks, and smoothies are estimated to grow by less than 1% in 2015, continuing the flatlining seen in recent years. Strong growth in the small, smoothies segment, driven by positive health perception and consumer interest in healthy snacking, has tempered losses seen ...

#### Pizza Restaurants - US

"Pizza has a long history in the United States as a favorite dish for diners of all ages. And while pizza restaurants are ubiquitous, there has been a surge in activity in recent years as fast casual pizza restaurants have emerged on the scene and other, established, pizza restaurants are ...

#### Prepared Meals and Sides - US

Frozen and refrigerated meals and side dishes are convenient, easy, and diverse, all attributes long popular among consumers.

#### Cheese: Spotlight on Natural - US

## Food and Drink - International

Sales in the total soup category have been flat and are expected to remain flat through 2020. Sales of refrigerated and frozen soups, as well as broths and stocks, are anticipated to grow on account of their less-processed nature and consumers' interest in cooking. Canned and dry soup brands, which ...

### Cereal - Ireland

"With sugar increasingly coming under scrutiny from health groups, government organisations and consumers themselves, we can expect to see cereal brands moving forward doing more to reduce their sugar usage – with a key challenge being to assure consumers that less sugar does not necessarily mean less taste."

– ...

## October 2015

### Cheese - UK

"On the whole, the cheese category is expected to see only slight volume growth in 2015, largely due to the largest segment, cheddar's, lacklustre performance. In contrast, strong volume performance from recipe and territorial cheeses suggests consumers may be seeking greater variety in their cheese purchases."

### Poultry and Game Meat - UK

"There is a need for tangible and easily comparable information on different welfare schemes in the poultry market. Helping shoppers to make an informed choice should help to unlock the added value of these initiatives in the eyes of the shoppers to drive demand."

### Craft Beer - US

"As beer sales stagnate, craft is a small bright spot preventing a loss of share to wine and spirits. Mintel estimates craft growth in 2015, and continued growth through 2020, though at a slowing rate."

### White Spirits - US

The \$23.2 billion cheese category continues to perform well, boosted by consumer preferences for natural foods and increased snacking occasions. The strong natural cheese segment remains key for overall growth, especially as processed cheese sales and consumption remain rather stagnant.

### Red Meat - UK

"Inflation has been the primary driver of value growth in the red meat market in recent year. With wage growth outpacing inflation since late 2014, this should facilitate both volume growth and trading up in the red meat market"

### Bread and Baked Goods - UK

"Health-related concerns are amongst the key barriers to more frequent usage of packaged sliced bread among infrequent users. Among these concerns, carbohydrates and calorie content are on a par."

- Amy Price, Senior Food and Drink Analyst

### Poultry - US

"Poultry has enjoyed steady sales increases since 2010 with continued growth through 2020, largely based on consumers' interest in eating better with leaner protein, and due to the increasing cost of beef. Other poultry – including turkey, duck, and other fowl – has had the strongest growth of all poultry ...

### Sandwiches, Subs and Wrap Concepts - US

"This report explores consumer dining, market and culinary trends in the fast food (QSR) and fast casual segments of sandwich, sub and wrap restaurants. The report covers consumer attitudes regarding the type of restaurant they visit and during which daypart, desired attributes of the foods they order, attitudes toward the ...

### Innovation on the Menu - US

## Food and Drink - International

"Growth has been small but consistent year-over-year from 2011 to estimated 2015, with low, single-digit growth. Overall sales are expected to continue upward at a similar pace, as dark spirits trend and vodka, the largest spirits segment, continues to post small but positive gains."

### Diet Trends - US

"Consumers are somewhat skeptical about diet products, and instead of purchasing traditional diet-specific products they are turning to a well-balanced diet and products that support it."

### Still, Sparkling and Fortified Wine - UK

"With limited plantings and uncertain harvests, demand for Prosecco may outstrip supply in the near future, helping to push up prices but also creating opportunities for other sparkling wines such as Crémant and English Sparkling Wine to capitalise upon."

– Chris Wisson, Senior Drinks Analyst

### Meat and Meat Substitutes - Ireland

"With prices of meat declining between 2014 and 2015, it has seen a slight decline in the total market value; with discounter retailers increasingly seeing more consumers buying meat from them."

– Brian O'Connor, Senior Consumer Analyst

## September 2015

### Pet Food - UK

"The market looks to face pressure from the ageing population, growth in privately rented dwellings and concerns around pet obesity. However, the interest in pet food with premium features, such as 'human grade' ingredients and chilled pet food, suggest opportunities for NPD to fuel trading up."

– Douglas Faughnan ...

"Consumers have unprecedented choice when dining out, and all restaurant segments are constantly vying for attention. Restaurant owners must keep in touch with what is currently happening in the foodservice industry and understand some of the emerging trends."

### Pizza - US

"Retail pizza sales are consistent, if not spectacular, as consumers turn to the options most often out of the need for a convenient, value-conscious option for their families. Brands seeking to lure new or current consumers in the category should bear in mind the notable interest in customizable options and ...

### Gluten-free Foods - US

"While some consumers view the gluten-free diet as a fad, gluten-free food consumption continues to trend upward, fueled mostly by its general health halo, and also as a treatment for those with celiac disease or gluten sensitivity. Market competition continues to heat up as manufacturers both large and small enter ...

### Attitudes to Seasonal Celebrations Foods - UK

"Indulgence tends to take centre stage within seasonal celebration foods, with these occasions providing an excuse for people to focus on taste rather than healthiness, even if they are typically diet-conscious. However, that one in four seasonal food shoppers would be interested in purchasing healthier versions of food for seasonal ...

## Food and Drink - International

### Breakfast Cereals - UK

"Overall average retail prices were rising between 2010 and 2013 but owing to the rise in popularity of the discount supermarkets and bargain stores there has been deflation in the market over the last two years. Consumers' breakfast habits are changing, with a wider variety of foods available, providing enticement ...

### Attitudes towards Healthy Dining Out of Home - UK

"Despite the attention attracted by healthy eating, the emphasis needs to be on taste first and health second in the foodservice, as eating out remains a leisure activity at heart."

– **Helena Childe, Senior Foodservice Analyst**

### Families Dining Out - US

"While parents on average have higher incomes than the national average their costs of living are exponentially higher. As such, they are much more likely to report cooking at home to save money as well as using deals when they do go out to eat. Restaurants need to focus on ...

### Gum, Mints and Breath Fresheners - US

Sugarless gum and regular gum sales have seen fairly steady declines since 2010, and are expected to continue doing so through 2020, with sugarless gum dropping an estimated 31.7% from 2010-20, and regular gum declining an estimated 20.2% during the same time frame. Factors such as smoking rate ...

### Cookies - US

"Cookie sales are on a general upward slope, with healthier cookies braced to experience the strongest growth through 2020 as the segment leverages its strong appeal among the category's biggest demographic: young families. Standard cookies will remain the largest segment, as consumers embrace them as affordable indulgences for themselves and ...

### The Millennial Impact: Food Shopping Decisions - US

### Yellow Fats and Edible Oils - UK

"Whilst there are pockets of growth in the yellow fats and edible oils market – such as butter and speciality oils – overall, the market is in poor health. Value and volume are predicted to fall in 2015 across spreads and cooking/olive oils, hastening the need for operators to ...

### Food and Non-food Discounters - UK

"In both food and non-food retailing discounters are making a big impact and they still have some way to go. We expect a period of consolidation in non-food discounting which will begin with Poundland absorbing 99p Stores. But even with that bonus Poundland and its multi-price peers led by B&M ...

### Dark Spirits and Liqueurs - UK

"The commoditisation of flavoured vodka provides a cautionary tale for dark spirit brands to take heed of to try to retain the inherent premium image of the market. The Famous Grouse provides a good example of a brand that has innovated with different expressions while simultaneously promoting itself as a ...

### Coffee - US

Total retail sales of coffee posted 8.7% gains in estimated 2015. The strong year-over-year growth seen through 2012 slowed in 2013 and 2014 as manufacturers and consumers felt coffee's increasing prices.

### Vitamins and Supplements - UK

"Value sales of vitamins and mineral supplements flatlined in 2014, as reduced NPD (New Product Development) and a shift towards healthier diets impacted consumer interest in the market. Sales of demographically targeted vitamins continued to fare well, however, reflecting the consumer desire for personalisation."

### Vitamins, Minerals and Supplements - US

## Food and Drink - International

"Compared to older generations, Millennials exhibit a unique set of behaviors regarding their eating and food shopping habits. They prioritize health and freshness, have a foodie mentality at home and away, and shop for food across a variety of retail channels. Additionally, Millennials distrust large food manufacturers, citing a need ...

Traditionally, sales in the vitamins, minerals, and supplements market have been driven by older consumers who are more engaged in the category. Now, brands are attempting to increase use among younger adults by focusing on short-term benefits, such as vitamins that address beauty concerns as well as provide energy or ...

### Butter and Spreads - Ireland

"With growing attention on the dairy farmer protests both in Ireland and further afield, it will see consumers putting more emphasis on the fair treatment of farmers, and perhaps see butter buyers more likely to search out products that have been made locally and/or claim to ensure farmer welfare ...

### Sports and Energy Drinks - UK

"After a period of robust growth, sales in the sports and energy market lost momentum in 2014. While energy drinks are doing well, this has been offset by the poor performance of the sports drinks segment. The energy drinks segment makes up the vast majority of the market. This has ...

### Coffee - UK

"Instant coffee, which still accounts almost three quarters of all value sales of UK coffee, has seen a sales fall as it loses drinkers. Meanwhile the pods segment continues to go from strength to strength."

– Douglas Faughnan, Senior Food and Drink Analyst

## August 2015

### Burger and Chicken Restaurants - UK

"A slower-growing core user base places an onus on fast food operators to work ever harder to engage with them. Using digital technology to a greater extent and making restaurants more inviting as a place to socialise should help them to do so."

– Richard Ford, Senior Food and ...

### Consumers and the Economic Outlook: Quarterly Update - UK

"The generally positive outlook of the economic climate, and the benefits that are gradually being witnessed at the individual level, means that the people of Britain are finally regaining their confidence. For the first time since the economic downturn, Mintel's data shows that more people feel better off compared to ...

### Fruit - US

"The fruit market has experienced fairly steady growth since 2010, and Mintel expects much of the same through 2020. Like the vegetables market, fruit's performance has been bolstered by fresh fruit, and hurt by shelf-stable segments. The frozen fruit segment may be small but it has maintained rapid growth and ...

### Food Packaging Trends: Spotlight on Food Labeling - US

"While grocery shoppers continue to seek tasty, nutritious food, the impact of food labels appears to be waning. Differentiation exists across generation groups in terms of the type of information sought from labels. Inspiring purchase can come from boosting ingredient transparency, enhancing functional packaging elements that preserve freshness, and engaging ...



## Food and Drink - International

### Hot and Cold Cereal - US

The hot and cold cereals market continues to see sales declines similar to recent years, mostly driven by the cold cereal segment, with many consumers believing offerings are too processed and not convenient enough. The only growth occurring is in hot cereal, albeit from a small base. To grow the ...

### Defining Ethnic Food - US

Consumers are embracing a host of ethnic cuisines and, in the process, are expecting those dishes to deliver not only more flavor than mainstream foods but also specific attributes by cuisine. Mexican and Latin American dishes appear to be the domain of spicier flavor profiles, while Mediterranean and Thai offerings ...

### Burger and Chicken Concepts - US

As Americans continue to gravitate toward chicken and sandwich concepts, operators are answering their desire for premium and better-for-you products that are natural and highly customized. More restaurants are focusing on making a better burger and chicken sandwich through high quality meats, cheeses, and toppings. International flavors have also made ...

## July 2015

### Fish and Shellfish - US

“Although fish and shellfish consumption per capita lags far behind meat and poultry (see Market Drivers), brands may be able to leverage consumers’ expanding palates by targeting fish eaters with campaigns that encourage them to try different species that offer unique or exotic flavors, as nearly six in 10 buyers ...

### Eating Out: The Decision Making Process - UK

“Competition for the leisure pound means that foodservice operators cannot rely on rising real wages alone to prompt higher spend. Innovative restaurant design can help them create standout. While making the restaurant experience more engaging, interactive features can also bolster secondary expenditure.”

### Yogurt and Yogurt Drinks - US

" Total retail sales of yogurt and yogurt drinks posted 2.9% gains in estimated 2015. Pace has slowed from strong year-over-year growth in 2011-13 as the novelty of Greek-style products fade. Overall sales are expected to continue upward as consumers remain interested in health, nutrition, and high-protein food and drink ...

### The Online Foodservice Consumer - US

"Consumers continue to seek convenient solutions for their busy lives. One way to enjoy the restaurant experience without leaving home is to order foodservice foods via online ordering. Even restaurants not equipped for delivery now have the ability to employ the services of a third-party delivery service in order to ...

### Coffee Shops & Sandwich Shops - Ireland

“The market for coffee shops and sandwich shops in IoI enjoys strong usage with eight in ten Irish consumers visiting a coffee shop or sandwich shop at least once in the last three months. A generation of café goers are now at ease using coffee shops to catch up with ...

### Yogurt and Yogurt Drinks - UK

Estimated at just shy of £2 billion, sales of yogurt and yogurt drinks enjoyed estimated growth of 12% in value terms over 2010-15. However, this was driven by rising prices, with volume sales falling by an estimated 4% over the period.

### Tea - UK

The downward trajectory within the overall tea market continues. Overall volume sales dropped by 15% between 2010 and 2014, with an annual decline of 7% forecast for 2015. Despite a rise in average selling price, the value of the market has also been steadily slipping over the 2010-15 period, with ...



## Food and Drink - International

### Attitudes Towards Innovation in the Food Market - UK

"Sampling remains popular among would-be users as a prompt for trial. Further value can be built into free samples in the eyes of consumers through positioning them as exclusive, as many people like to be the first to try a new product."

### Attitudes Towards Alcoholic Drinks - UK

"Rather than focusing only on under-35s, flavoured NPD (New Product Development) should also be looking to appeal to the profitable over-35 group, focusing less on sweet tastes and more on factors such as premium ingredients and unique production processes."

– Chris Wisson, Senior Drinks Analyst

### Ice Cream and Frozen Novelties - US

Ice cream and frozen novelties eked out dollar sales growth of 10% from 2010-15 (zero growth when adjusted for inflation). The mature category remains popular with consumers; 90% of respondents to Mintel's custom consumer survey purchased frozen treats in a store in the past six months. Recent listeria-related product recalls ...

### The Restaurant Decision-making Process - US

"Restaurants have many operational and menu elements to balance to service the greatest number of consumers. While operators may not be able to please all the people all the time, they can look at the demographics that spend the most and evaluate what they are looking for. In some cases ...

### Healthy Dining Trends - US

As Americans continue to be plagued with chronic diseases, such as obesity, cardiovascular issues, diabetes, etc, there is rising interest on the part of consumers to eat for better health. Since they visit restaurants so often, they seek better-for-you (BFY) restaurant foods. However, foodservice operators still struggle with providing foods ...

### Tea & RTD Tea - US

"The tea and RTD (ready-to-drink) tea category has experienced stellar growth in recent years, the result of growing interest in health and wellness and greater availability in both bagged/loose leaf and RTD teas."

### Frozen Breakfast Foods - US

"The frozen breakfast foods category reached \$3.2 billion in 2015, although it struggled to grow sales over the last two years. The category continues to face competition from other breakfast foods viewed as healthier or more convenient, as well as foodservice options."

### Artisan Food - Ireland

"The improving economic situation in NI and RoI has helped to see consumers loosen their purse strings a little in 2015 and to the benefit of artisan food products. That being said, moving forward, consumers will increasingly expect goods positioned as being artisan to prove these credentials."

– Brian ...

### Innovations in Beer - Ireland

"The Irish beer market appears to have had a good year, with reported growth in 2014, however, the Irish market is not out of the woods just yet, with total sales expected to see a slight decrease in 2015. With increased innovation in the beer market, and in particular craft ...

June 2015

## Food and Drink - International

### Snacking in Foodservice - US

The limited service specialty snack segment is growing, as consumers continue to snack on-the-go and enjoy the variety of foods and beverages that snack shops offer. Snacking in LSRs (limited-service restaurants) can be healthful or indulgent, but customization is the key focus. Portability and convenience are important in the segment ...

### Eating Out Review - UK

The eating out market continues to grow modestly and has largely held its own as a key area of discretionary expenditure. However, the share of people deeming eating out as their top spending priority shows a downward trend.

### The Ethical Food Consumer - UK

"Ethics is becoming ever more ingrained into food and drink operators' sourcing policies but it is a complex area which is important to get right. Not only do consumers expect good ethical practices from operators, they also expect to be informed and reassured over why they're paying extra and where ...

### In-store Bakeries - US

"In-store bakeries will continue their recent pattern of sustained, if not spectacular, sales growth, particularly as innovation in baked items deliver healthier indulgences and more convenient breakfast baked goods. With a fairly sizable portion of consumers not even thinking of their in-store bakery as an option for breads and other ...

### The Food/Drink Shopper: Beyond the Grocery Store - US

"While supermarkets continue to dominate retail sales of food and drink, a slight loss of share can be seen from 2005-15. Supermarkets aren't going the way of dinosaurs; however consumer interest in low price, convenience, and fresh offerings, as well as changing eating habits, drive movement to a wider range ...

### Ice Cream and Desserts - UK

"There is no shortage of innovation in the ice cream and desserts market. There is nonetheless plenty of scope to take NPd in new directions to inject even more excitement into the category and grab the attention of experimental "foodie" consumers keen to step outside their comfort zone. Super sour ...

### Attitudes towards Sports Nutrition - UK

Whilst three in four adults exercise, with six in 10 doing so at least once a week, only 28% of adults eat/drink sports nutrition products. Positioning sports nutrition products as an important part of an 'everyday' exercise routine thus offers potential for the market to bring new users into ...

### Vegetables - US

The roughly \$50 billion vegetable market has grown 2-5% annually since 2010. The market has been bolstered by fresh segments (fresh-cut salad and fresh vegetables), and hampered by the smaller frozen and shelf-stable vegetables segments. Mintel expects much of the same through 2020 as consumers further latch on to the ...

### Carbonated Soft Drinks - UK

"That nearly half of adults view low sugar content as more important than the brand highlights how essential it is that brands' diet/light variants are widely available to retain users. However, concerns continue to linger about artificial sweeteners, translating to marked interest in plant-derived sweeteners in the CSD (carbonated ...

### Carbonated Soft Drinks: Spotlight on Natural/Craft - US

"The CSD category has faced several years of sales declines, the result of artificial ingredients, sweeteners, sugar concerns, links to obesity and diabetes, and other health issues. Total retail sales of carbonated soft drinks (CSDs) is expected to decline as negative diet soda sales continue to overtake regular sales gains ...

## Food and Drink - International

### Cheese - Ireland

“With the cost of cheese for NI and RoI consumers continuing to decline in 2015 on the back of the abolition of the EU milk quotas, we will continue to see the value of the cheese sector decline. Moving forward cheese companies will need to look more closely at innovations ...

### Pet Food - US

“Although pet owners’ interest in premium pet food will contribute to some sales growth in 2015, the humanization trend is evolving beyond flavors to ensuring nutritional benefits, ingredient quality and manufacturing standards are as high as human food rather than transposing human food trends wholesale into pet food.”

— ...

## May 2015

### Chocolate Confectionery - UK

"While low/no/reduced sugar chocolate innovation in the UK is still very much a niche area, there are tentative signs that operators are placing a greater focus on it. Chocolate products with a low/no/reduced sugar claim grew from 1% of new launches in 2012 to 4% in ...

### Consumers' Food Safety Concerns - UK

The level of trust consumers have in the food and drink industry is evidently low, with few believing either retailers or manufacturers to have complete information on their supply chains. Consumer faith in the role of the state, or official bodies, in guaranteeing the safety of food and drink in ...

### Kids' Snacking - UK

Almost all parents bought snacks for their child in the six months to March 2015. Also reflective of the ingrained nature of kids’ snacking is that three quarters of children snack at least once a day.

### Added Value in Dairy Drinks, Milk and Cream - UK

"The dairy drinks, milk and cream market faces challenges on several fronts at present, including for example, the maturity of the white milk segment, the ongoing grocery retailer milk price wars, concerns over sugar (flavoured milk) and the macro trend towards healthier products (cream)."

### On-premise Alcohol Trends - US

“Millennials offer an opportunity for restaurants to cater to their unique tastes and desires, as this group is more likely to drink at restaurants than are other generations. Operators that offer distinct drinks such as specialty cocktails and restaurants’ own brand of alcohol can help create the quality dining experience ...

### Competitive Shift: Retail into Foodservice - US

“Food retailers have gained traction in the freshly prepared meals category by providing foods that are of high quality, healthy, and competitively priced. Further, they have renovated stores and spaces to highlight their offerings, making these products easy for consumers to find and purchase. Foodservice operators need to focus on ...

### Free-from Food Trends - US

"Foods bearing a free-from claim appear increasingly relevant to consumers, even as those claims begin to cite relatively obscure ingredients. These foods, in

### Prepared Meals Review - UK

“Actively encouraging people to give prepared meals their own twist may make these products more attractive through added involvement in the preparation process, also tapping into many consumers’ interest in

consumers' eyes, are closely tied to health – whether their own, their family's, or the planet's."

## Pub Catering - UK

"The expansion of casual dining and ethnic food venues and the new threat posed by coffee shops trialling evening menus should act as a clarion call to pubs to ensure they can compete when it comes to modern dining trends."

## Energy Drinks - US

The energy drink and shot category posted stellar gains of more than 50% between 2009 and 2014, thanks to consumers' needing extra energy for their hectic lifestyles and specific popularity with Millennials. It has recovered from its lowest sales gains in 2013, when the category came under fire for ingredient ...

## Sugar and Alternative Sweeteners - US

The sugar and alternative sweeteners category reached almost \$5 billion in 2014, representing growth of only 3% from 2009-14. Sugar's negative impact on health has impaired growth; however, honey represents the category sweet spot and is indicative of the future natural direction of the market. At the same time consumers ...

## Bread - Ireland

"Consumer interest in healthy baked goods should inspire NPD activity. Incorporating wholegrain as well as ancient grains such as chia and spelt is further likely to enhance the appeal of the category."

– **Sophie Dorbie, Research Analyst**

## April 2015

## Dairy and Non-dairy Milk: Spotlight on Non-dairy - US

"Consumers want the healthiest beverage; however, many are not certain what that beverage is. Conflicting

## Food and Drink - International

experimenting with food. Here, recipe ideas can help to illustrate the versatility of products."

– **Emma Clifford, Senior Food ...**

## Alcoholic Beverage Mixers and Liqueurs - US

Dollar sales of alcoholic beverage mixers declined from 2009-14, settling at just over \$315 million. While cocktail culture is in full swing, cocktails experience lower consumption than beer, wine, and spirits.

## Pub Visiting - UK

"More one-off promotions, for example, linking into seasonal produce, and enabling consumers to redeem the offer on smartphones rather than with paper vouchers could help to boost usage of promotions."

– **Chris Wisson, Senior Drinks Analyst**

## Consumers and the Economic Outlook: Quarterly Update - UK

"Economic improvements are finally beginning to be felt at the consumer level. Falling prices of essentials and rising wages are helping incomes go further and there are indications that people are beginning to relax their budgets and spend on items and experiences that have been out of reach during the ...

## Frozen Snacks - US

"The frozen snacks market continues its relatively flat performance of recent years, as consumers find other snacking options increasingly palatable in terms of

## Food and Drink - International

reports on health leaves consumers confused, and forcing heated segment competition. To resonate, milk manufacturers must continue to educate consumers.”

### Baby Food and Drink - UK

“Brands could offer parents more reassurance about the healthiness of manufactured baby/toddler food by referencing more actively on-pack all the nutritional qualities the product has to offer, acknowledging key nutrients such as protein, calcium and carbohydrates.”

– Colette Warren, Food and Drink Analyst

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

“Cost is also a barrier hampering over-45s’ interest in the market and introductory offers or money-back guarantees could encourage trial to try to address the doubts about the quality of these drinks.”

– Chris Wisson, Senior Drinks Analyst

### Eating Out: The Digital Consumer - UK

“As the mobile platform remains a relatively underdeveloped part of the restaurant market in the UK, there is much scope for operators to use smartphone apps to push more impulsive eating out habits, such as through ‘push’ marketing techniques.”

### Pasta, Rice and Grains - US

“The pasta, rice, and grains categories face stagnant sales due to perceptions that, in general, they are high in gluten and carbohydrates and the mixes may be too processed. Brands must provide more healthful options to spur sales. Emerging grains can help breathe new life into this category, with additional ...

### Fruit and Vegetables - Ireland

convenience, flavor, and nutrition, leaving frozen snacks relatively few new consumer bases to mine. Households with children remain the \$4.5 billion category’s key audience, but growing ...

### Biscuits, Cookies and Crackers - UK

“After a period of impressive growth since its launch, the breakfast biscuits market lost momentum in 2014. That a quarter of users are interested in breakfast biscuits with a high fruit content, and a similar number are interested in high-protein versions, signals scope for further development.”

– Aimee Townshend ...

### Full Service Restaurants - Casual, Family and Fine Dining - US

“Foodservice operators, including full service restaurants, have been focusing mostly on Millennials, but there are other demographics that also offer lucrative opportunities, such as Baby Boomers and Hispanics. Since price is still a consideration for so many of the younger population, it makes sense to focus on those with more ...

### Convenience Stores - UK

“Convenience stores are most used in urban environments with the majority of consumers using c-stores close to their home. The millennial generation, aged 16-35, are the most likely to visit c-stores and also are the most frequent users of the format. This generation is increasingly migrating to urban areas and ...

### Snacking Motivations and Attitudes - US

“Nearly all Americans snack, especially younger adult consumers who also are more likely to have increased their snacking frequency over the last year. Snacking may also be replacing standard daily meals, and this behavior is likely to continue. Americans claim a preference toward healthier snacks, specifically those with simple ingredients ...

“Ongoing price wars within the fruit and vegetable sector have been to the benefit of Irish shoppers, but to the detriment of the market value of the fruit and vegetable sector in Ireland. However, volume sales of produce have improved between 2013 and 2014, as Irish consumers increasingly try to ...

### March 2015

#### Convenience Store Foodservice - US

“While some consumers have a less-than-stellar opinion of c-store foodservice, this sentiment is beginning to wane, especially among younger consumers. Now is the time for c-store operators to showcase their new food and drink capabilities that can rival those of quick service, be just as fresh as fast casual, and ...

#### Bottled Water - US

“Although convenience/PET bottled water accounts for a majority share of bottled water sales, the sparkling water category is growing at a far more rapid pace as consumers look for alternatives to CSDs and other sugary drinks. Convenience/PET brands may need to focus more on enhanced water to significantly ...

#### Consumer Snacking - UK

“Despite the interest in added value snacks, the current offering is limited when it comes to various health-related factors. However, with spending habits predicted to relax, operators could be missing out on consumers being better able to trade up to these types of products.”

– Colette Warren, Food and ...

#### Snack, Nutrition and Protein Bars - US

“Consumers want healthy options. When asked to create their ideal bar, 65% of respondents built a bar they categorized as healthy (compared to 28% who built an indulgent bar).”

– Beth Bloom, Food and Drink Analyst

#### Attitudes towards Emerging Cuisines - UK

“While penetration of emerging cuisines is still low, interest is high. The presence of emerging cuisine restaurants on the high street is growing while there is greater focus from retailers like M&S on expanding their ethnic offering. These trends are helping to bring the less established cuisines into the spotlight ...

#### Bottled Water - UK

“That the concept of water filling stations resonates with almost four in 10 bottled water users indicates that opportunities are ripe for brands to explore this scheme. As well as helping to position companies as forward thinking and socially responsible, such a move would be in tune with the younger ...

#### Online Grocery Retailing - UK

“The online sector is starting to mature – this way of shopping for food is not for everyone. That is good news for retailers as they have a vested interest in customers using their physical stores where they can market opportunistic buys more effectively and encourage impulse purchasing. In contrast ...

#### Made to Order: Smoothies and Shakes - US

“Foodservice operators who focus primarily on smoothies are experiencing competition from brands that are not smoothie-centric, retail products, and consumers preparing their own smoothies at home. Operators need to show consumers their products have value, by offering fresh ingredients, produce that consumers may find hard to source, or items that ...

## Food and Drink - International

### Attitudes to Home-delivery and Takeaway Food - UK

“Some concerns still linger about the quality of food offered by UK takeaway operators. Leveraging the demand for fresh and ‘real’ home-delivered food should help operators to increase their competitiveness in this market.”

– **Helena Childe, Senior Foodservice Analyst**

### Organic Food and Beverage Shoppers - US

“Considering the typically higher cost of organic foods and beverages, consumers are increasingly hard pressed to justify the added expense. As such, sales have hit something of a plateau, where they likely will remain until consumers have a clear reason to turn to organics.”

– **William Roberts, Jr., Senior ...**

### Nut-based Spreads and Sweet Spreads - US

“Product innovation by way of added nutrition, natural ingredients, and new flavors, combined with a focus on key demographics, may help boost category sales, especially within the sweet spreads segment.”

– **Amanda Topper, Food Analyst**

### Non-alcoholic Water Enhancers - US

“An abundance of beverage launches and continued category blurring is creating RTD products that cater to every user need requiring less self-customization. Consumers gravitating toward natural trends further harm the category.”

### Specialist Food and Drink Retailers - UK

“Attributes such as quality standard marking, food traceability and low food miles/freshly produced on-site can all be compelling reasons for shoppers to favour specialists and eschew the mainstream retailers.”

– **Chris Wisson, Senior Drinks Analyst**

### Attitudes towards Premium Alcoholic Drinks - UK

“As many consumers appear to have become savvier and more discerning, brands need to move beyond attaching a generic premium claim to their drinks.”

– **Chris Wisson, Senior Drinks Analyst**

## February 2015

### Established World Cuisines - UK

“The improving consumer confidence suggests both the need and opportunities for premiumisation in the retail channel. The strong interest in a wider offering of chilled cooking sauces among ethnic food buyers highlights this as a potential key area. The ingredients segment should also justify further attention as people in higher-income ...

### Attitudes towards Premium Soft Drinks - UK

“Sugar attracted negative media coverage in 2014, also affecting soft drinks. That half of premium soft drinks users are interested in reduced sugar versions of these

### LSR: Ethnic Concepts - US

“Consumers have favorable opinions about ethnic food and flavors, as well as the LSR brands that offer them. For operators who want to remain in a good light, they need to be up-to-speed with restaurant mobile technology, use high-quality ingredients, and offer both new ethnic fare and ‘tried-and-true’ items to ...

### Menu Flavours - UK

“The interest in trying new dishes as hobby further signals the importance of unique dishes in driving interest particularly among those who see themselves as ‘foodies’ and underlines the role of dining out as a leisure activity, competing with other experiences.”



signals room for growth in this area.”

– **Aimee Townshend, Research Analyst**

### Attitudes to Healthy Eating - UK

“That only 7% of people trust health claims on food dilutes their ability to add value. The food industry stands to benefit from combatting the serious lack of awareness about the high level of regulation in place that this implies.”

### Chocolate Confectionery - US

“Chocolate confectionery is a treat. Nearly three quarters of consumers turn to these products as a treat, meaning the category will need to promise and meet this most basic expectation.”

– **Beth Bloom, Food and Drink Analyst**

### Beverage Packaging Trends: Spotlight on Beverage Labeling - US

“Beverage packaging options have a greater opportunity than ever to establish a rapport with the consumer and find a place as part of their daily lives. QR codes can allow manufacturers to communicate virtually directly to the consumer, a majority of whom want more information about the beverages they are ...

### Ethnic Restaurants and Takeaways - UK

“Whilst online ordering and the expansion of large chains should boost growth in the sector, operators must do more to improve on the market’s Achilles heel; a low perception of value for money.”

– **Richard Ford, Senior Food and Drink Analyst**

### Fish and Seafood - Ireland

“Increasing the availability of alternative fish species in-store and within new products, backed by promotional activity and recipe suggestions, may encourage

### Meal Accompaniments Review - UK

“There remains plenty of scope to build the penetration and usage frequency of ancient grains, for example by communicating their versatility, convenience and value for money. Their health credentials in particular are a key angle that operators can leverage given the current low levels of awareness of the nutritional benefits ...

### Packaged Red Meat - US

“The red meat category features lamb and other red meats that are not regularly eaten by mainstream meat consumers. There is an opportunity to educate consumers about the lower saturated fat levels in these other meats, and provide them instruction about how they can be used in some of their ...

### Consumers and the Economic Outlook: Quarterly Update - UK

“People are finally starting to feel the benefit of the recovery in their pay packets. After five years, average wages are finally increasing more quickly than prices. Although this will take time to feed through into consumer confidence, there are signs that spending habits are changing.

### Private Label Foods: What's Driving Purchase? - US

“Improvements made to the quality and varieties of store brand foods have not gone unnoticed by consumers. However, there is opportunity to increase category participation among older consumers, and to introduce more premium product lines featuring organic, non-GMO, and/or vegetarian products which consumers feel are lacking in the current ...

consumers to opt for new fish options and go some way towards tackling sustainability issues.”

– **Sophie Dorbie, Research Analyst**

### January 2015

#### Crisps, Savoury Snacks and Nuts - UK

“Strong consumer interest in new concepts such as savoury-flavoured cereals and meat-flavoured nuts should add interest to the savoury snacks market, whilst vegetable crisps would benefit from a more mainstream operator entering the market.”

– **Richard Ford, Senior Food and Drink Analyst**

#### Cooking Sauces, Pasta Sauces and Stocks - UK

“Although chilled cooking sauces are an established part of the market, their use continues to lag behind that of ambient ones. While the price premium of chilled sauces is curbing uptake, lack of variety in the segment, heavily geared towards pasta sauces, also seems to play a role. Exploring other ...

#### The Protein Report: Meat Alternatives - US

“Protein alternatives fall in two camps: eggs and everything else. Eggs are widely, almost universally, consumed and have the advantage of a host of health benefits to appeal to consumers; however, their cholesterol levels impact those health-based purchase occasions. Meat alternatives, on the other hand, remain a niche market at ...

#### Beer - US

“While beer is still a significant part of consumers’ drinking repertoire, Big beer needs to embrace the full food/drink expectations and behaviors of their key Millennial audience as they drive the rest of US consumers toward the same: ingredient scrutiny, quest for food/drink experiences, appreciation of brand and ...

#### Sugar and Gum Confectionery - UK

“Rising dental health concerns can create an opportunity for chewing gum brands. Currently much of the marketing for sugar-free gums centres around fresh breath, however, the dental health benefits, particularly for children, could warrant more focus. Though explored internationally, tooth-friendly gums tailored for children remain rare in the UK market ...

#### Consumer Attitudes toward Sugar and Sweeteners - UK

“‘Naturalness’ appears to have become almost synonymous with healthiness and elicits trust from consumers, while anything artificial people tend to be wary of. This creates opportunities for manufacturers to move away from refined sugar and towards those with strong natural connotations in their recipe formulations.”

– **Emma Clifford, Senior ...**

#### Nutritional and Performance Drinks - US

“The category can position its products as relatively affordable tools of support, to help consumers meet their personal health and wellness goals. Promoting products for their proven efficacy in meeting a range of specific consumer needs (eg hydration, weight management, skin health, sustained energy) will be one means of encouraging ...

#### Chips, Salsa and Dips - US

“While consumers report buying chips/dips mostly to satisfy a flavor craving or facilitate snacking, health claims have the greatest potential to give another reason to buy. As many consumers are migrating away from processed foods toward fresher options, they may be less concerned about fat, salt, or calorie counts ...

## Food and Drink - International

### Salty Snacks - US

“As consumers continue to snack more frequently on salty snacks and other options, manufacturers will be tasked with meeting their varying need states. While some consumers look for BFY snacks, the top reasons for buying salty snacks are as a treat or to satisfy a craving, indicating there is room ...

### Dining Out: A 2015 Look Ahead - US

“Rising commodity prices have forced foodservice operators to increase menu prices during a time when many consumers are still budget-conscious. However, one demographic that is faring better is men. The changing American family structure has resulted in more fathers taking their children out to eat. Like other demographics, fathers are ...

### Hispanic Consumers and Dining Out - US

“As Hispanics’ expenditures on dining out continue to grow, restaurants that work toward making Hispanics feel welcomed may not only entice them to return, but may benefit from them sharing their good experiences at the restaurant with others; when Hispanics think about where to dine out, they give a lot ...

### Cider - UK

“Talking about the use of specific apple/pear varieties in a similar way as beer is now doing with hops could further build premium cues by strengthening an image of quality ingredients.”

– **Chris Wisson, Senior Drinks Analyst**

### Breakfast Restaurant Trends - US

“There is still room for expansion and improvements in the breakfast segment. Some of the biggest names in foodservice breakfast are still pushing the envelope in terms of beverages and food innovation. The biggest hurdle for operators is to keep up with the fast movement of the segment. Brands that ...

### Food Storage and Trash Bags - US

“Food storage and trash bag sales are expected to grow steadily in the next few years. Market players could generate more incremental sales by developing and launching innovative new food storage and trash bag products, putting a stronger emphasis on consumers’ use of food storage products away from the home ...

## January 1970

### Attitudes Towards Lunchtime Foods - UK

“Wage increases have finally started to outpace inflation. This should translate to a greater willingness to buy lunch out of home more often, to trade up to premium options, and to buy extras such as snacks, drinks and desserts. However, the long slowdown means that frugal spending habits have become ...

### Spirits - Ireland

“While high taxation and the looming threat of minimum alcohol pricing makes drinking spirits a costly endeavour in Ireland, growing consumer confidence might help to see the spirits market recover somewhat in 2015.”

– **Brian O’Connor, Production Manager**