

**March 2018**

## **Bottled Water - UK**

“While the spotlight on plastic waste is a threat to the whole soft drinks market, the option of tap water and roll-out of water refill stations make this a more severe challenge for bottled water. Widespread feelings of guilt among consumers over the plastic waste generated by drinking bottled water ...

## **Online Grocery Retailing - UK**

“The smallest and quickest-growing aspect of the grocery market, online grocery is a sector that has seen a vast number of innovations in the past year as it strives to evolve to cater not just for big-basket supermarket-style shops but also for smaller top-up-based shops.”

## **Brand Overview: Food - UK**

“Expectations of brands and the categories they are in key to consumer perceptions. Breakfast cereals are a clear example of this. Health standards set by certain brands impact upon the way in which other brands that do not match up are viewed. Conversely, brands in treat categories largely avoid being ...

## **Attitudes towards Home Delivery and Takeaway - UK**

“Consumers’ need for quick convenient meals is confirmed, as four in five Brits have bought takeaway food recently. Young working adults and parents are driving demand for weekly home deliveries, prompted by the rise of online ordering and third-party services.”

– **Trish Caddy, Foodservice Analyst**

## **Alcoholic Beverage Drinking Occasions - US**

“Dollar sales of alcohol (on- and off-premise) reached \$234 billion in 2017, a 3.5% gain over 2016. Overall sales increased by 20% from 2012-17 due to a supportive economic climate, product innovation – including flavor and format advancements – and a focus on premiumization, all which have encouraged trial ...

## **Food and Drink - International**

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

“People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

## **Health Food Retailing - UK**

“The health food specialists have capitalised on the health and wellbeing trend but it hasn’t been easy as supermarkets and online players have increasingly muscled in on the market. The most important factor for specialists is trust, both as a way to combat the threat of the competition but also ...

## **Baby Food and Drink - UK**

“With the income squeeze likely to further boost the popularity of homemade food, it is imperative for manufacturers to convince consumers that their products are worth paying more for. Highlighting ingredient provenance would help to project an image of quality and transparency, much needed given parents’ low trust in brands ...

## **The Leisure Outlook - Quarterly Update - UK**

“Although participation in many leisure activities continues to grow there are areas of the market that may begin to struggle if consumers begin to increase their saving habits. There is a growing range of eating out venues so pubs and restaurants need to stay innovative.”

– **Helen Fricker, Associate ...**

## **Cakes, Cake Bars and Sweet Baked Goods - UK**

“While this is a mature market in terms of overall usage, most people do not treat themselves to cakes and sweet baked goods that often, with scope for increasing frequency of usage. A mixture of activity is needed to appeal, as a broad spread of attributes are important to people ...

## Food and Drink - International

### Convenience Store Foodservice - US

Total c-store (convenience store) foodservice sales reached an estimated \$38 billion in 2017; while foodservice sales will grow, Mintel forecasts growth will occur at a slower rate relative to previous years. C-stores tend to have a loyal consumer base that drives most foodservice purchases. Though these consumers are important, operators ...

### Salty Snacks - US

The nearly \$12 billion salty snacks market continues turn in a strong performance driven by the increasing prevalence of snacking. Meat snacks, popcorn, and cheese snacks are the category's three largest segments and are responsible for much of the growth. New flavors and varieties are key to continued growth, as ...

### Nutrition and Performance Drinks - US

"Sales of nutrition and performance drinks held steady in 2017. Consumer interest in health and in products that provide functional benefits spelled gains in recent years. A relatively positive economic climate has allowed consumers to spend more on drinks that promise added value. A slowdown is seen in 2017 due ...

### Healthy Dining Trends - US

"Consumers are no longer satisfied by the basics when it comes to ordering a healthy dish at a restaurant; unique, flavor-driven dishes are becoming the norm. Highlighting ingredient quality gives even indulgent dishes, like pizza and burgers, a halo of health. Younger consumers are being impacted by this trend and ...

### Convenience Stores - US

"Faced with declines in motor fuel rates, cigarette smokers, and carbonated soda drinkers in recent years, the convenience store (c-store) industry is in a state of change as it looks toward other product areas and innovations to drive sales. Leading retailers in the industry are focused first and foremost on ...

### Food Packaging Trends - UK

"The spotlight on plastic packaging and its environmental impact will be a key driver of change in the food industry. Consumers' expectations for sustainable packaging are set to heighten demand for alternative materials. Responding to the shifting demographic backdrop is also vital, given the growing number of small households and ...

### Baby Food and Drink - US

"After two years of stagnating sales, the \$6.8 billion market for baby/toddler food and drink shows indications of growth ahead. Largely stemming from formula sales, the category is expected to leverage a number of healthy attributes and claims in premium-positioned products. Parents are seeking healthy attributes above all ...

### Butter, Margarine and Oils - US

An ingredient or flavor booster in a wide variety of recipes and dishes, butter, margarine, and oils are used by nearly all consumers. While widespread penetration does challenge substantial growth, the overall category did manage a small gain, 1% from 2016-17, stemming from the gains of butter while margarine struggles ...

## February 2018

### Pasta, Rice and Noodles - UK

"Convenience and value for money remain key strengths for the category and should support the market if inflation remains high and consumer incomes are squeezed. Meanwhile, encouraging new dish and cuisine pairings for pasta, rice and noodles remains key to establish new usage occasions and drive volume growth."

### Attitudes towards Healthy Eating - UK

"The income squeeze coupled with the perceived expense of healthy food has the potential to curb the overarching healthy eating trend. However, it also opens ripe opportunities for retailers to provide more support for shoppers in making choices which are both healthy and price savvy – doing so should promote ...

## Food and Drink - International

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### Potato and Tortilla Chips - US

Potato and tortilla chips have generated solid growth in recent years, driven by the increasing prevalence of snacking, a steady stream of new flavors, and the category's status as a permissible indulgence. Bold and creative new flavors and forms will continue to drive sales in coming years, along with a ...

### Alcoholic Drinks Review - UK

"Many consumers are moderating their alcohol intake, putting pressure on the industry. However, consumer interest in low- and non-alcoholic drinks and widespread quality over quantity mindset suggest opportunities for brands to stay on the menu."

– **Kiti Soininen, Category Director, Food & Drink**

### Children and Health - US

"Illness is prevalent among children, as 97% of children younger than 12 experienced some type of illness symptom in the past year. Their weaker immune system combined with opportunities for interaction and germ spreading makes them especially susceptible to illness. The OTC (over-the-counter) children's health products market has continued to ...

### Bottled Water - US

The bottled water category continues steady growth contributed by all segments. As consumer concern over sugar and hydration grows, still and sparkling waters alike reap the benefits. Brands at both ends of the price spectrum are finding success: private label often winning via price, and premium bottled water appealing via ...

### Baking and Dessert Mixes - US

The market for baking and dessert mixes is a large one, valued at nearly \$4 billion. However, it continues to shrink, following a pattern that has endured for much of the past decade. That lack of growth is not necessarily

### World Cuisines - UK

"Improved ranges, particularly in own-label and in emerging cuisines, are providing a boost to sales. With interest in emerging world cuisines still significantly higher than current at-home eating though, a big opportunity exists for further sales growth through building familiarity with less widely eaten dishes. This includes using promotions and ...

### Menu Trends - UK

"Although older diners enjoy common cooking methods like roasting, steaming and stir frying, affluent 16-44-year-olds are driving the shift towards emerging food trends including smoking, curing, raw food, fermenting and pickling. Pizza brands are leveraging consumer demand for wood-fired oven cooking; however air pollution concerns may result in the banning ...

### Fast Casual Restaurants - US

Even as things change, they still remain the same. The concept of quality food at an affordable price that launched the fast casual segment has remained a key association. However, as dining habits shift and the landscape gets more competitive, fast casuals look beyond what worked in the past and ...

### Full Service Restaurants - US

"FSRs (full service restaurants) continue to experience sales growth and set the trends that influence the entire restaurant industry as well as retail food. However, while the market as a whole is growing, many individual FSRs, especially mainstream casual dining chains, are facing sales losses. Market saturation and changes in ...

### Crackers - US

"After a four year period of modest growth, sales of crackers fell slightly from 2016-17, thanks in part to intensified snacking competition. Benefitting from consumer interest in snacking and a reputation for being versatile, the crackers category enjoys nearly universal

the result of consumer dissatisfaction, but it is resulting more ...

penetration, making growth difficult to come by. As a category ...

**January 2018**

### Condiments and Dressings - UK

"Wider trends in the food market, such as consumers' appetite for emerging cuisines, have impacted usage of condiments/dressings. While this has hit sales of dish-specific sauces, NPD in mayonnaise inspired by hot and spicy flavours has re-energised the segment. Sizeable interest in fermented condiments and a wider availability of ...

### Consumers and the Economic Outlook - US

"Economic improvement continued at a relatively steady clip as a new presidential administration took office at the beginning of the year. While there have been natural catastrophes and tragedies throughout the US, the economy has generally remained stable and any expert predictions continue to be optimistic."

- Jennifer White Boehm, Associate ...

### Private Label Food and Drink Trends - US

"Sales of private label food and beverages have risen only modestly in recent years, roughly keeping pace with sales of food and beverages overall. The pace of growth, however, could pick up in coming years as retailers look to their store brands to strengthen their value propositions amid intensifying competition ...

### Crisps, Savoury Snacks and Nuts - UK

"While enjoyment and indulgence play a key role in the market, health considerations are also affecting it, driving the growth in popcorn, nuts and meat snacks. That half of savoury snack eaters deem snacks made with pulses healthier than potato-based ones suggests scope for further NPD here."

- Anita ...

### Sugar and Gum Confectionery - UK

"With volumes sales of sweets expected to continue to fall, the onus is on companies to encourage trading up within the category. The premium end of the market, however, remains underdeveloped – despite strong consumer demand – creating ripe opportunities for innovation in this area. High quality ingredients, sophisticated flavours ...

### Plant-based Proteins - US

"Consumers are open to plant-based alternative proteins, and while they recognize health concerns as a distinct selling point for these, they will not waver when it comes to taste. There may well be significant opportunity to leverage the flavors of Hispanic cuisines, as there is a strong degree of interest ...

### Managing Your Health - US

Consumers and brands alike are talking about wellness in the face of an uncertain healthcare market and growing health issues. To bring down healthcare expenses, health management is increasingly placed in the hands of consumers who are turning to a variety of sources to improve their wellbeing and receive guidance ...

### International Food Trends - US

"International cuisines, flavors, and ingredients continue to be an area of opportunity in both foodservice and retail. Young consumers in particular represent a key opportunity as they show high interest in international foods but lack the skills required to actually cook international cuisine at home. While many consumers still prefer ...

## Food and Drink - International

### Ethnic Restaurants and Takeaways - UK

“Much of ethnic restaurants and takeaways’ growth will come from businesses driving existing store performances on the back of strong brand management, menu development and home delivery options. ‘Foodism’ continues to fuel demand for new flavours found in ethnic cuisines, specifically among younger Millennials, parents and those living in urban ...

### Cider - UK

“Smaller servings are a promising means for cider companies to attract custom in both the off- and on-trade. These should appeal to the health-conscious through lower alcohol units and calories, and also financially through a lower item price. This latter is arguably especially needed given the pressure on household incomes ...

### Seasonal Dining Trends - US

Seasonal menu items are associated with a positive, treat-based sentiment, which makes them a key focus for foodservice operators. However, with retail maintaining an edge when it comes to seasonal purchases across a variety of categories, foodservice operators need to understand the preferences and demographics of seasonal consumers, while also ...

### Beverage Blurring - US

10% of US adults drink hybrid/fusion drinks in a typical day. While this is dwarfed by more commonly consumed drinks, such as water (81%), carbonated soft drinks (44%), and juice (43%), it’s not a bad showing. Good taste drives consumers’ beverage choices. And while hybrid drinks can capture attention ...

### Retail Venue Catering - UK

“The UK’s love of eating out is providing opportunities for retailers to move into this sector. The boundaries of retail venue catering are increasingly being pushed with a simple supermarket café likely to become a thing of the past. Consumers are used to eating out regularly and in a bid ...