

### May 2012

#### Artisan Foods - Ireland

The artisan food market throughout Ireland has the potential to help both NI and RoI recover from the recession. However, increased pressure is being placed on the industry due to an increasingly price-driven consumer who has not got used to heavy discounting within the food retailing sector, along with increased ...

### April 2012

#### The Retailing of Food and Drink - UK

“The market for food is changing. We are seeing the beginnings of a shift away from the superstores and towards online retailing and convenience stores. That is not to say that the superstores are in trouble, but the days when they swept all before them are now over.”

### March 2012

#### Attitudes toward Beverage Sweeteners - US

Consumer health concerns are the top factor in shaping their attitudes toward sweeteners. Although obesity rates have nearly stabilized in the past five years at 68%, they still remain high. As a result, more than half of U.S. adults aged 18+ watch their diets and around 60% of these ...

#### Dry Pasta, Rice and Noodles - US

The \$5.1 billion dry pasta, rice, and noodles category is diverse, consisting of three segments: dry pasta and noodles, dry rice and rice mixes, and dry macaroni and cheese, all offering consumers a myriad of products that can be eaten as meals, side dishes, or snacks. Sales have fluctuated ...

#### Cereal and Snack Bars - US

Despite minimal growth in 2011, the cereal/snack bar category generated \$3.7 billion in total U.S. sales. Of the two segments—granola bars, and breakfast/cereal/snack

#### Refrigerated and Frozen Dough - US

The refrigerated and frozen dough market grew by 8.1% between 2006 and 2011. The market grew during the recession, but it faces challenges going forward, including increased competition from bakery products and restaurants as the economy recovers. To maintain the market, dough makers and retailers will need to adapt ...

#### Pet Food - US

In spite of the recession and subsequently slow recovery, consumers continue to dote on their pets, making this category—if not quite bomb-proof—at least able to withstand the shellacking suffered by many other categories. The pet food market experienced sales of more than \$18 billion in 2011, and is projected to ...

#### Pizza and Pasta Restaurants - UK

“One of the key challenges in this market is maintaining engagement with consumers as they age. There is a gap in the market to cater to these less frequent diners who

## Food and Drink - International

bars—granola bars accounted for the largest share of the market with \$2.1 billion in sales for 2011. Breakfast/cereal/snack bars ...

are looking for more special occasion dining opportunities.”

### Pasta, Rice and Noodles - UK

“Despite the wealth of cookery programmes on the television and internet, the level of knowledge in some of the more basic areas of cuisine is rather lacking in the UK. Just over one in ten (12%) pasta users agree that it is difficult to cook pasta to the correct texture ...

### Convenience Store Foodservice - US

While convenience stores have offered fresh, prepared foods for years, it's only over the last decade that the trend has accelerated. Today, convenience stores are capturing more dashboard-dining occasions, delivering the benefits of quick, easily accessible, one-stop shopping. Industry players have sought to increase consumer awareness and trust for c-store ...

### Pet Food and Supplies - UK

“Children have a major influence on the pet food market, and can be an important source of ‘pester power’ therefore it is vital for brands to engage directly with families to maximise their potential.”

### Ethnic Restaurants - US

Ethnic restaurants have proliferated as Americans' palates have become sophisticated and diners have sought out new flavors and experiences. Italian, Mexican, and Chinese cuisines remain the most popular, with more than half of all respondents having visited one or more such restaurants in the past month.

### Attitudes Toward Fiber and Digestive Health - US

Studies have consistently shown that most Americans do not eat the recommended daily allowance (RDA) of fiber. According to many studies, high-fiber diets can promote cardiovascular health and help one lose weight, both of which are important to millions of Americans. Indeed, it is becoming increasingly clear that fiber provides ...

### Private Label Food and Drink - UK

“Brands remain the most widely used type of product (89%) and outperformed the own-labels in terms of sales in 2011. However, consumer sentiment indicates that brands may in fact be most at risk in 2012 with own-labels well placed to benefit from a growing pool of users.”

### White Spirits and RTDs - UK

“The new types of RTD have revived a flagging market and could potentially lead the overall RTD market back to the £1 billion mark. Its main obstacles at the moment are that people are put off by the lack of freshness inherent in this product and that – for older ...

### Sweet and Savoury Spreads - UK

“With almost half of consumers enjoying trying new flavours/varieties of sweet spreads and more than two fifths of consumers agreeing that own-label savoury spreads taste just as good as branded, flavour innovation can help to maintain engagement by refreshing this long-established and traditional category.”

### Consumers and The Economic Outlook - Quarterly Update - UK

The report includes an overview of the changes in household well-being over the last three years, a breakdown of planned and recent spending, and

### Carbonated Soft Drinks - US

The carbonated soft drinks market suffered a sales decline in 2011, as two of the three segments that comprise the market exhibited a poor performance. During 2010-11, the largest segment, regular soda,

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consumers' assessment of how well they manage their money. Free to Mintel Oxygen subscribers, the report is the third in an ongoing series of quarterly updates ...

declined by 2% while the second-biggest segment, diet soda, fell by 2.1%. Soda is the most-consumed nonalcoholic ...

### Dairy Products - Ireland

With food prices increasing and consumer spending power remaining low, the Irish dairy category is faced with an increasingly challenging operating environment. However sales are still being driven forward by a demand for healthy products.

### Foodservice - Ireland

The all-Ireland foodservice market has been in continual decline since 2008 due to the impact of the recession. The Restaurant Association of Ireland (RAI) reported that around 700 restaurants and coffee shops closed down between 2009 and 2011 as a result of the economic crisis.

## February 2012

### Nutrition and Energy Bars - US

While sales of many consumer products have seen declines in sales due to the poor economy, this has not been the case for the nutrition and energy bar market. While not entirely recession-proof, this sector has shown itself to have staying power even in the light of continuing economic woes ...

### University Foodservice - US

The face of university foodservice is changing as managed service and self-service providers raise the bar to meet the demands of an increasingly diverse student body, and one that has come to expect a higher level of service than generations past. This has created a challenging marketplace of increased competition ...

### Attitudes Toward Sodium - US

It's no secret that demand for better-for-you (BFY) snacks, prepared foods and beverages is on the rise. Companies around the globe are reformulating old products and bringing new ones to market to satisfy changing consumer preferences. While low and reduced-calorie products are at the forefront of this shift, concerns about ...

### Breakfast Cereals - US

The breakfast cereal market generated an estimated \$10.2 billion in total U.S. sales for 2011. While the market is substantial in size, the most pressing concern for marketers is that it has been in decline since 2009. This is due in part to the fact that with a ...

### Cider - UK

"Consumer research shows that drinkers like one or two ciders but view it as too sweet to drink all night. However, there are a number of ways around this: promoting dry ciders alongside sweeter variants and smaller, more concentrated serves."

### Fruit and Vegetables - US

Fruits and vegetables, whether fresh, canned, or frozen, are in the national spotlight as an important component of improving and maintaining health and curbing obesity. This may be the reason that the fruit and vegetable industry has been a growing category in retail channels, in spite of tough economic times.

### Tea and Other Hot Drinks - UK

"The current crop of loose leaf teas, including Twinings and Yorkshire Tea, are far from youth-oriented. Therefore, running youthful, contemporary-styled ad campaigns of loose tea products provides an opportunity

### Breakfast Restaurant Trends - US

Breakfast has been a notable trend in the restaurant industry as operators have either added breakfast platforms or revitalized breakfast offerings to counter declines in traffic and tepid consumer spending. Mintel

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for manufacturers to encourage demand among this group.”

### Coffee Shops - UK

“Consumers remain committed to eating out and coffee shops additionally benefit from being seen as an ‘affordable treat’. However, with stagnant salaries and the increasing cost of living, consumers’ spending capabilities have been curtailed, meaning that 2012 is likely to be as tough on operators as 2011.”

### Cereal, Energy and Snack Bars - UK

“Cereal bars are one of many markets which are perhaps failing to fully leverage this value-added angle. Satiety, energy and all-natural ingredients provide three of the potentially most lucrative attributes which resonate with cereal bar users.”

### Beer and Cider - Ireland

Alcohol consumption levels within Ireland decreased between 2007 and 2011, leading to an impact on the beer and cider market. In particular the pub trade has decreased in value, with 30,000 jobs having been lost in RoI alone since 2007.

Menu Insights shows a 24.2% increase in number of breakfast menu items available from Q3 2009 – Q3 ...

### Fruit and Vegetables - UK

“As food waste has become a primary concern for consumers and industry alike, companies can benefit from working together with consumers to avoid waste and cut costs.”

### In-Home Meal Occasions - UK

“More than four in five consumers say that they enjoy spending time with their family, indicating that marketing products, services and entertainment around this notion of family time should therefore resonate with the majority of consumers.”

## January 2012

### Gluten-free Foods - US

The retail gluten-free food market has grown to an estimated \$6.1 billion in 2011. While this figure includes all food labeled gluten free (including products that are inherently gluten free such as scallops or tomato sauce), sales of gluten-free food products that are alternatives to gluten-containing, grain-based products (e ...

### Ethnic Foods - US

An increasingly diverse population and more frequent home cooking helped the ethnic food market continue to grow in 2011, reaching nearly \$3 billion in sales. However, the 3.5% growth during this time is the slowest seen in the category over the five years prior. Signs of an improving economy ...

### Fruit Juice and Juice Drinks - US

The fruit juice and juice drinks market grew by 1% in 2011, which is an improvement on the 1.7% decline witnessed in 2009 and no gain (0%) in 2010. Nevertheless, the market remains challenged with a number of issues, the foremost being juice and drinks’ high calorie status, which ...

### The Drug Store Shopper - US

Retail sales at drug stores grew by 3.6% in 2011, reaching \$230 billion, and are expected to increase by a further 5% in 2012. Growth is driven by the aging population, rising levels of obesity and obesity-related illnesses and conditions such as diabetes and heart disease. As these groups ...

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### Home Baking - US

Strong growth in the \$12 billion home baking industry at FDMx in 2008 and 2009 slowed to a halt in 2010 and 2011. Similarly, strong growth in consumer interest in home baking waned slightly in the period, having been driven in recent years in part by a desire to save ...

### Chips, Pretzels and Corn Snacks - US

With a household penetration rate of 97.1%, the salty snacks category is one of the most popular among U.S. households. In 2011, U.S. sales of potato chips, tortilla chips, pretzels and corn snacks amounted to \$13.6 billion, illustrating the relative recession-resistance of these snack segments. As ...

### Liqueurs - UK

“Managing a shift in consumer perceptions can also help to change liqueurs from being viewed as old-fashioned by too many younger people. This is partly due to a failure to update the image of the category and capitalise on the category’s rich provenance as something alluring rather than anachronistic.”

### Crisps, Salty Snacks and Nuts - UK

“Price remains the main choice factor in 2011, with consumers increasingly looking to stick to tried and trusted brands and flavours. Keeping crisps affordable in the face of rapidly rising raw material costs is one of the most difficult, but important, challenges facing manufacturers and retailers today.”

### Bread and Baked Goods - UK

“To more effectively compete with own-label, brands need to emotionally engage with consumers, extolling the virtues of their expertise and – in the case of the older bakeries – heritage. But they are likely to struggle to achieve this without a stronger media presence.”

### Leisure Venue Catering - UK

“Leisure venue catering remains particularly vulnerable to cut backs in consumer spending as it is often seen only as a refuelling exercise. Operators therefore need to enhance the ‘experiential’ element of their catering offer eg by offering highly customisable service formats which add a sense of occasion/‘theatre’ as well ...

### Dining Out: A 2012 Look Ahead - US

In spite of the economic ups and downs of the past year, consumers have found a way to include dining out in their budget, perhaps becoming recession weary and finding restaurants a form of creature comfort. So much the more going forward as the economy begins to pick up.

### Food and Drink Packaging Trends - UK

“Three in four consumers state that it is important for brands/companies to invest in sustainable packaging, highlighting how this interest is translating into higher expectations on companies, suggesting opportunities for brands to stand out based on their credentials in this area. This reflects a broader trend identified by Mintel’s ...

### Beverage Packaging Trends - US

The Great Recession and a stuttering economy continue to influence consumer attitudes and behavior, and in turn, trends in the beverage market. According to Mintel GNPD, since the onset of the recession there has been significant new product launch activity in the beverage market driven by innovation in the alcoholic ...