

### January 2023

#### The Future of Foodservice: 2023 - US

“The foodservice industry will continue to evolve and grow with consumers’ heightened interest in away-from-home dining experiences that cannot be replicated at home. While what’s on the menu is core to driving traffic in 2023, how brands deliver on key areas of health and convenience to match consumers’ needs, schedules ...

#### Supermarkets - UK

“While the grocery sector is to a degree insulated from much of the pain being felt elsewhere in retail as much of its demand is non-discretionary, the shifts in behaviour seen in 2022 and that will continue to be seen in the short term have been no less dramatic. A ...

### December 2022

#### RTD Alcoholic Beverages - US

“Launch activity and popularity of canned cocktails are building upon the success and excitement already present in the RTD alcoholic beverages space. The category continues to deliver on the convenient, flavorful and fun beverages consumers crave. However, fading novelty and inflationary pressures is intensifying competition, calling for brands to build ...

#### White Spirits - US

“The white spirits market continues to see growth on the back of the fast-paced tequila segment, even in the face of economic uncertainty. Interest in premium offerings and brand loyalty among spirit consumers has created a market in which prioritization of quality and trust outweighs quantity. For seasoned spirit consumers ...

#### Consumer Approach to Healthy Eating - US

“Diet has become a four-letter word, but that doesn’t mean it’s lost its grip. Consciously rejecting diet culture, while a start, is a slow process that is still susceptible to

#### Foodservice in Retail - US

“Foodservice is a key strategic focus for retailers as they compete with restaurants and other foodservice operators for consumer food dollars. Expanded menu options, streamlined ordering and easy pairing with fresh foods to be cooked at homes represent ways for retailers to leverage their own strengths and respond to consumer ...

#### Sweet Biscuits - UK

“The cost of living crisis is already leading people to cut back on sweet biscuits, but given that 75% of people think that sweet biscuits are an affordable treat they are in a better position than many other discretionary items. In-store visibility for sweet biscuits is being hampered by HFSS ...

#### Cooking Sauces and Pasta Sauces - UK

“More at-home meal occasions brought about by the income squeeze offer opportunities for cooking/pasta sauces, although they will face greater competition from scratch-cooking. Ideas on how to use them with leftovers and suitability for cheaper cooking methods can help these appeal as people look to save money. Meanwhile, guidance ...

#### Alcohol Alternatives - US

“Sober curiosity is trending as consumers prioritize their health and wellbeing, prompting many to seek premium, unique, healthful and functional alternatives to alcohol. Products ranging from NA beer to mood boosting adaptogen tonics to traditional CSDs can leverage new

## Food and Drink - International

the mental health pitfalls of falling off track. Even as inflation threatens preferred product purchase, consumers still want to feel ...

opportunities as consumers strive to reduce their alcohol consumption. And while ...

### Frozen Breakfast - US

“Sales of frozen breakfast foods actually outpaced the considerable rates of inflation over the past year and continue to improve upon the sizable increases seen in the pandemic-fueled increase of 2020. However, maintaining that momentum will require the category to look beyond its convenient reputation and focus on improving perceptions ...

### Foodservice Alcohol Trends - US

“The experience on-premise drinks provide to consumers will provide a buffer as the foodservice alcohol market battles inflation headwinds and at-home alcohol consumption. As consumers navigate permanently changed yet uncertain schedules, they are looking to restaurants and bars to treat themselves, and operators can provide them with the opportunity to ...

## November 2022

### Vitamins and Supplements - UK

“While the COVID-19 pandemic propelled rapid growth in the market in 2020, sales have stagnated as concerns about the virus have eased. As more of the nation sees its finances stretched, efforts to prioritise health will ebb, leaving this category vulnerable to cutbacks. Highlighting the role they can play in ...

### Pizza - US

“Retail pizza’s well-established reputation as convenient and cost-effective provides a solid base, but the category’s most leverageable asset may be its versatility. There’s room to enhance retail pizza’s image both as an indulgent treat and as a healthy meal option. Innovation in both these directions will help the category attract ...

### Beer - US

“The affordability, versatility and social nature of beer is driving another strong year of category growth, though intensifying competition among brands. Near-term success is dependent on brands’ ability to align with the new era of drinking occasions, meet increasing flavor expectations and prove value through both cost savings and experience ...

### Functional Drinks - US

“From simply quenching thirst or providing additional ingredients that meet specific wellness needs (like stress relief), any beverage can be functional. Beverages seeking a truly functional identity will need to find a balance of fun and function, by guiding consumers through the experience, painting a picture of how the benefits ...

### Dark Spirits - US

“Consumer demand for premium dark spirits remains strong even as consumers rethink their total alcoholic beverage expenditures under the pressure of economic uncertainty. Increased interest in premium drinking experiences will only benefit the spirits market as more consumers seek to cut back their alcohol consumption but prioritize higher-quality alcoholic drinks ...

### Bread - UK

“Value sales growth in bread in 2022 is being driven by high inflation, with volumes hit by reduced frequency of eating bread. Developing more choice of flavours in bread could help flagging volume sales, and while brands will be vulnerable to people switching to own-label to save money during the ...

### Food and Drink Nutrition Claims - US

“The pendulum is swinging away from the zealous health aspirations of 2020 to reveal what consumers

### Coffee - UK

“A reversal in the previously flourishing coffee retail market’s performance in 2022 is underpinned by the end of COVID-19 restrictions and cutbacks amid the cost

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truly want: real food that supports their personal health needs. Clear on-pack food and drink nutrition claims that connect ingredients to tangible benefits will empower consumers to feel in control of their health, while ...

### Restaurant Breakfast and Brunch Trends - US

"In a time when value has heightened importance, the relative affordability of many breakfast and brunch options makes the daypart a solid place to drive traffic. While menu diversity can be a call to action that differentiates between operators, incentives in loyalty programs not only inspire occasions, but also secure ...

of living crisis. Many consumers' efforts to consume less caffeine also present a challenge. Addressing the various barriers towards decaffeinated coffee is needed to release ...

### Sugars and Alternative Sweeteners - US

"In a market that has faced volatility, consumers are searching for a sense of certainty when choosing sugar and sweetener products that best fit their needs. As consumers continue to navigate messaging surrounding sugar consumption, brands face the challenge of proving the positives. However, there is opportunity to help consumers ...

## October 2022

### Wine - US

"Following a prolonged period of drinking in, consumers are craving more high-energy and social occasions, and wine may be missing the mark. To be the choice in the next iteration of at-home consumption, wine brands should focus on fun over formality, rewiring wines' associations through new flavors, formats and experiences ...

### Approach to Breakfast - US

"Breakfast at home remains the norm for most consumers, even now that the pandemic has lost much of its grip on consumer behavior. Breakfast is also a matter of routine, but one that most consumers enjoy. The biggest opportunities for retailers and marketers may lie in helping consumers modify their ...

### Marketing to Moms - US

"Most moms put the needs of others before their own. This presents opportunities for brands to encourage moms to take moments for themselves and practice self-care so they can be at their best for their families. More can be done to encourage dads to take on a greater share of ...

### Baby Food and Drink - US

"Despite higher prices and the decade-long slowdown in birthrates, the market for baby/toddler food and drink grew 10.6%, fueled largely by inflation and stockpiling in response to the formula shortage. Going forward, category growth will require continued attention to nutritional and functional demands in cognition, digestion and immunity ...

### Pizza Restaurants - US

"Pizza remains top of mind for consumers as a reliable and consistent product that is affordable and customizable. In an uncertain economic climate, however, successfully competing with readily available foodservice options means that pizza operators must reinforce their expertise in delivering on value and convenience and innovate in a way ...

### Vitamins, Minerals and Supplements - US

"The majority of consumers rely on VMS products to strengthen their foundation of health. Yet, elevated usage of VMS products as a result of the COVID-19 pandemic has begun to soften. As the focus on a multidimensional approach to health intensifies, consumers will seek ways to personalize their supplementation routines ...

## Food and Drink - International

### Cooking in America - US

"While the number of home cooks is higher than it's been in recent years, interest in cooking has hit a low. Consumers emerged from pandemic restriction enthusiastic about dining out. However, 2022 quickly ushered in a new limitation: inflation, which is forcing many back into the kitchen for cost savings ...

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

"Although the income squeeze will prompt trading down in the market, against a strong 2021 and given trading down within the market, sales will fall in 2022. Calling out how to use processed meat in place of unprocessed meat cuts will chime. Meat reduction poses a long-term threat, but interest ...

### Pet Food - UK

"Belying the oft-cited 'recession-proof' nature of the category, shifts in behaviour driven by the cost-of-living crisis and high levels of inflation will see volume sales slip into decline in 2022. While its expensive image is a major barrier for eco-friendly pet food, there are ripe opportunities around concepts combining sustainability ...

### Pet Food - US

"Inflation is driving sharp increases in pet food dollar sales but isn't weakening pet owners' resolve to feed their pets the best. Quality, health and palatability are as important as ever. In addition, a new generation of sustainability-minded owners will demand options that are easier on the planet but still ...

### Natural and Organic Food Shopper - US

"Natural and organic brands' uphill battle in justifying their products' prices has only gotten steeper as inflation's record grip heightens sensitivity to sticker shock and scrutiny toward all products' value. Walking the walk has never been more important for natural and organic brands' survival; done well, they can position themselves ...

### Cheese - UK

"The income squeeze will take its toll on cheese, with 42% of people who eat and buy cheese saying money concerns would make them spend less. Together with the popular view that own-label cheese is just as good quality as branded, this puts the leading brands under pressure to prove ...

### Chocolate Confectionery - UK

"Growth in volume sales of chocolate will be dampened by a combination of the income squeeze, HFSS restrictions and consumers' focus on moderation. Evenings in and gifting will support sales during the cost-of-living crisis, given that eight in 10 eaters and buyers of chocolate think it is an affordable treat ...

### Coffee and Tea Tracker - US

Coffee and tea continue to exhibit strong growth led by away-from-home occasions, as consumers flock to cafes on their commute, to socialize and as a third space. Operators should prioritize unique offerings to compete with at-home occasions. Growth in tea should incentivize brands to market across generations, as consumers seek ...

## September 2022

### Cheese - US

"The cheese category has grown 19% since 2017, owing in no small part to significant gains made during the course of the pandemic. More importantly, the category has yet to relinquish much of those gains as consumers continue to embrace the category and its versatile, flavorful range of offerings. With ...

### Food and Non-food Discounters - UK

"Following two years of pandemic-impacted trading the UK's economy has now been hit by record inflation. Amid this growing cost-of-living crisis, consumers are increasingly looking at ways to stretch already tight budgets. The discounters with their clear value focus are

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set to benefit from this period of financial uncertainty. As ...

### Gum, Mints and Breath Fresheners - US

“The gum, mints and breath fresheners market needs a dose of refreshment itself, including stronger brand identity, innovation and the introduction of new occasions for use. Proving relevancy in routines will help a market that was stagnant pre-pandemic and continues to struggle.”

### On-premise Restaurant Technology - US

“On-premise technology offers operators and consumers the path to a common goal – a seamless dining experience featuring high quality food. By implementing the right technologies, restaurants can make operations efficient and deliver on consumers’ expanded needs for value, convenience, speed while also offering highly personalized experiences that build consumer ...

### The Gen Z Food Consumer - US

“Gen Zs were forced to come of age in uncertain times, facing pandemic-related disruptions during the final stages of childhood and the first of adulthood, followed by record inflation. Already vulnerable to new financial pressures, Gen Z will remain focused on value. Brands can ease the transition, providing guidance, rewards ...

### Dining Out Dayparts - US

“Despite consumer desire for elevated experiences after a period of limitations, value will continue to play a critical role in dining out decisions, and smaller, more affordable options may be the economizing compromise that diners opt for, rather than overt attrition. Brand communications should reinforce notions of enjoyment and the ...

### Dark Spirits and Liqueurs - UK

“Dark spirits and liqueurs’ discretionary nature and relatively high price mean that they are likely to lose sales over 2022-23 as a result of pressure on household incomes. Smaller formats, including RTD versions, are among means for brands to support sales even as shoppers economise. Extensions into sweet treats also ...

### Yogurt and Yogurt Drinks - UK

“Rapidly rising inflation in the yogurt category and the wider cost of living crisis put the leading brands at risk of trading down in 2022 and 2023. The continued interest in health however will drive continued demand in the category, also creating opportunities for operators to drive added value. Keen ...

### Tea and Other Hot Drinks - UK

“Tea holds a comforting constancy for people. The cost-of-living crisis will boost the appeal of this perception, as consumers seek out emotional support during stressful times, while cost-saving efforts fuelling at-home occasions should prevent a steeper drop in tea retail sales. Localism and alcohol moderation trends represent potential areas of ...

**August 2022**

### Breakfast Cereals - UK

### Burger and Chicken Restaurants - UK

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“The strong perception of breakfast cereals as a good-value breakfast choice will support the market while household incomes are squeezed. Making the contribution to daily nutrient intakes more central to on-pack messaging can help the category tap into the predicted long-term focus on health. Meanwhile, interest in ideas about what ...

“Consumer behaviour within the fast food market continues to be polarised, as some associate value with low-cost food, and others associate it with high-quality burgers and chicken. As operators have been forced to pass rising costs on to customers, some brands are premiumising their offer with a range of more ...

### Tea and RTD Tea - US

“Tea’s time-honored roles in both the wellness space and many consumer routines secures demand in the face of pricing volatility, though inflation’s blanket presence over grocery purchase decisions may amplify – and redirect – consumers’ value appraisals. A category comfortably basking in its health halo, tea and tea drink brands ...

### Frozen Snacks - US

“The frozen snacks category has grown 52% since 2017, boosted by demand for cost-effective, filling snacks and small meals that are easy to make. Nevertheless, the category does face a lack of identity, as consumers recognize frozen snacks as convenient and flavorful but don't appear to regard them as ...

### Attitudes towards Low- and No-Alcohol Drinks - UK

“The market’s overpriced image is curbing growth during the cost-of-living crisis. Developing flavour complexity, for example through aroma and warming ingredients, and exploring added benefits around health and mood will help to boost perceptions of value. Inclusion in lunchtime meal deals will lower the price barrier, boost visibility and unlock ...

### Coffee and RTD Coffee - US

“Consumers are looking to cut costs following rising inflation, creating opportunities for coffee brands to capitalize on consumers’ decrease in foodservice expenditures. Consumers’ investments in their home coffee bars made during the pandemic are paying off as consumers increasingly experiment with new coffee drinks within the home, offering growth opportunities ...

### Weight Management Trends - US

“The movement towards holistic health and self-care – fuelled in part by the pandemic – has become part of the conversation surrounding weight management strategies. It’s now imperative that industry players utilize a lifestyle approach for the greatest efficacy and sustainability. While emotional ‘feel good’ factors are important, weight managers ...

### Prepared Meals - US

“Convenience is a defining benefit of the prepared meals category, but in an increasingly competitive marketplace, convenience alone isn’t enough to drive sustained growth. Prepared meals makers must work to meet ever-rising consumer expectations for product quality, health, and taste.”

## July 2022

### Nuts, Seeds and Trail Mix - US

“The nuts, seeds and trail mix category is ready for a reset. Despite strong connections to snacking, plant-based proteins and a generally healthy reputation, the category was one of the few largely unaffected by the pandemic: finding neither gains nor losses during its heights and now seeing a slight slowdown ...

### Fast Casual Restaurants - US

“Fast casual operators should seize the opportunity to capture new and existing diners to combat competition in other segments and become the go-to destination for all meal occasions. With the right marketing tactics and promotions, operators in this segment can continue to accelerate their growth and win with new and ...

### Milk and Non-dairy Milk - US

### Marketing to Millennials - US

## Food and Drink - International

"Inflation is putting the holistic value of dairy milk on a pedestal, while calling greater attention to non-dairy's shortcomings in taste, nutrition and versatile usage. As economic conditions improve and discretionary income returns, the playing field will once again level off. Dairy and non-dairy milk brands can play a role ...

### Juice and Juice Drinks - US

"Shifting consumer motivations for increased juice and juice drink purchase demonstrates the duality of the category as both a health tool, and a guilty pleasure. While consumers aren't trying to deny their sugar problem and see the validity of juice and juice drinks in delivering quality nutrition, they're more interested ...

### Non-chocolate Confectionery - US

"The biggest strengths of non-chocolate confectionery are in its variety of taste, texture and overall experience while also meeting the need for personal treating and snacking. The foundation for the market is strong, but split, as consumers are not necessarily loyal to brand or even product attributes. Brands will benefit ...

### How People Shop for Alcoholic Drinks - UK

"Meal deals' important role in driving alcoholic drinks sales, particularly among younger adults, suggests that more brands should look to be included in these promotions. Meal deals can help to cut through decision paralysis among people feeling overwhelmed by retailers' selections, and can also help to drive sales of alcoholic ...

### Sugar and Gum Confectionery - UK

"Value sales of sweets and gum have shown a strong recovery in 2021/22, but volume growth remains hard to achieve. While consumers show strong interest in sugar reduction NPD, such products continue to play a limited role in the market, the technical hurdles in delivering a compelling experience a ...

"Millennials are at a lifestage where they are in distinct subsegments – some becoming newly independent while others are comfortably settling into parenthood. Because Millennials are at such different stages, each with their own unique set of needs, they must be marketed to accordingly. For example, Younger Millennials aspire to ...

### Ready Meals and Ready-to-cook Foods - UK

"While incomes feel squeezed in 2022, ready meals/ ready-to-cook foods can offer an affordable alternative to eating out. Making healthy ingredients visible will help the category respond to the predicted long-term focus on health, whilst interest in shelf-stable, vegetable-based ready meals points to an opportunity for the segment to tap ...

### Foodservice Coffee and Tea - US

"The foodservice coffee and tea market overcame COVID-related challenges as consumers resumed their pre-pandemic behaviors and returned to their favorite coffee shops. While the rise of remote work will shift market dynamics, remote workers remain steadfast AFH coffee and tea customers. However, rising inflation will create new challenges for foodservice ...

### Travel Hub Foodservice - UK

"Having endured an extremely challenging couple of years, UK travel hubs must now contend with the cost-of-living crisis. The threat of commuters seeking cheaper alternatives is driving travel hub foodservices to play on price, but high overheads make this unsustainable.

Providing good value is not always about being the cheapest ...



June 2022

## Regional and International Flavors and Ingredients - US

"Global cuisines remain a conduit of both creativity and comfort despite the volatility of the past two years. Slight shifts are emerging pointing to signs that while mainstream cuisines remain popular consumers are exploring beyond the classics. While interest in exploration signifies innovation opportunities, brands will need to offer balanced ...

## Yogurt and Yogurt Drinks - US

"2022 is expected to mark the strongest growth of the yogurt category's three-year pandemic upswing. The health and convenience of yogurt align with consumers' new-normal lifestyles and priorities, and perceived affordability gives the category an edge against rising grocery prices. As inflation stabilizes, brands will be challenged to avoid falling ...

## Attitudes towards Lunch at Home - UK

"A permanent shift to more remote working will continue to support the at-home lunch occasion going forward. Pressures on household incomes in 2022 will boost the appeal of home-made lunches as an affordable option, benefiting ingredients and meal components. Products which tick a number of boxes on nutrition will tap ...

## Food and Drink Gifting - UK

"Food and drink gifting occasions will remain resilient during the income squeeze in 2022-23, but there is a strong likelihood of trading down within categories. Recommendations of more affordable substitutes for favourite products should chime in this climate. 'Build your own gift package' initiatives can also help retailers to attract ...

## Convenience Stores - US

"Convenience stores are an essential part of many consumers' shopping journeys and will see an increase in traffic as some consumers with pent-up demand take to the roads in Summer 2022. Convenience stores will be a functional purchase for shoppers, but there is opportunity to infuse fun into the purchase ...

## Food and Drink - International

## Pasta and Noodles - US

"While the last two plus years have provided a windfall for the category, there is still work for brands to do. The issues that once stifled growth persist. Still, consumers are well engaged drawn undoubtedly for the versatility, convenience and affordability of most products. To sustain some of the momentum ...

## Marketing to Gen Z - US

"Whether they are teenagers or young adults, Gen Z are in a transitory phase in their lives, as even the adult members of this generation are not yet fully financially independent of their parents. While also having to deal with the struggles traditionally associated with coming of age, Gen Z ...

## Chocolate Confectionery - US

"Chocolate confectionery's best assets have shone in recent years, further solidifying an already strong role as a versatile, indulgent, satisfying and convenient treat and snack. Yet a new generation of consumers with contemporary ideas about indulgence, snacking and wellbeing will challenge brands to meet new needs, tastes and occasions to ...

## Plant-based Proteins - US

"PBMA sales are slowing following the market's pandemic-driven growth in 2020, as initial trial of PBMA products has not translated to sustained category engagement. The PBMA market faces a positive long-term outlook; the development of better tasting, less-expensive products along with increased interest in climate-friendly diets will propel future sales ...

## Brand Overview: Drink - UK

"As inflationary issues and economic uncertainty impact on household budgets and discretionary spend, it will become even more critical for brands to communicate their value proposition to resonate with consumers. Brands that align their offerings to wellness trends,



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position their launches as more than just beverages and encourage consumers to ...

### Restaurant Marketing Strategies - US

"Word-of-mouth marketing remains the most vital source of restaurant discovery. Still, operators should continue to grow their brands in the digital space as it evolves. Diners want to hear more about establishments regarding topics of food quality, new menu items and loyalty rewards and programs. Operators should focus on relaying ...

### Convenience Stores - UK

"New technologies, ways of living and government legislation are opening up exciting opportunities for the convenience sector but retailers must adapt quickly to tap into them. A renewed focus on making the experience convenient as well as revamping food-to-go will be top of the agenda, but rising inflation, growing costs ...

### World Cuisines - UK

"The world cuisine retail market will benefit from these products offering an affordable alternative to eating out as incomes are squeezed in 2022. Familiar dishes 'with a twist' can help lower barriers to trial for less established cuisines, whilst versatile products suitable for meat-containing and meat-free meals can tap into ...

### Condiments - US

"Consumers are at a crossroads: grappling to balance new routines, with rising prices and eagerness to simply explore and indulge a little. 2022 is a good time for condiment brands to lay the foundation to further extend their pandemic gains while addressing challenges to the future market. Younger adults, under ...

## May 2022

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

"While tradition runs strong in the nut-based and sweet spreads market, there is opportunity for growth through expanded uses and occasions past the breakfast occasion and bread application. Leverage the neutral attitudes consumers have towards nut-based and sweet spreads health associations to inspire versatile occasions and applications that will increase ...

### Foodservice Loyalty - US

"Though establishing consumer loyalty requires competency in providing high-quality food and beverages, maintaining it is a challenge that most foodservice operators are tackling by launching loyalty and subscription programs. Points- or tier-based programs are becoming ubiquitous in the industry, but ongoing labor, inflation and supply chain challenges make it difficult ...

### Breakfast Eating Habits - UK

### Restaurant Takeout and Delivery - US

"Consumers are facing pandemic fatigue and are enthusiastically returning to dining out. Their interest in and usage of takeout/delivery offerings remains virtually unchanged but is set to grow even further. As technological and operational advancements strengthen off-premise offerings across the industry, operators will need to compete on delivering the ...

### Private Label Food and Drink - US

"While private label food and drink lost market share in 2020 and 2021 amid the disruption of the pandemic, it is likely to regain momentum in 2022 as spiking inflation makes the savings of store brands more compelling. The full potential of private label, however, revolves around more than just ...

“The return to workplaces and places of study has offered long-awaited support for out of home venues. Some 51% of adults reported eating breakfast out of home in early 2022, this figure set to rise further as people are asked to go back to workplaces more regularly.

The enduring shift ...

### April 2022

#### Ice Cream and Frozen Novelties - US

“Sales of ice cream and frozen novelties remain elevated far beyond the pre-pandemic baseline, though have entered a period of stabilization as consumers eagerly return to out-of-home experiences and manage soaring grocery spend. Exciting flavor profiles, snackable formats, premium concepts and experiential tactics can keep consumers engaged, justify higher prices ...

#### Attitudes towards Healthy Eating - UK

“Propelled by the pandemic-driven rise in both eco- and health- consciousness, the prevailing ‘holistic health’ ethos is increasingly extending to that of the planet, and a very powerful proposition will be created through bringing together benefits around both. The popular concepts of ‘food as medicine’ and ‘mood foods’ continue to ...

#### Grocery Retailing - US

“After two years, COVID-19 continues to have an impact on the grocery sector. The combined pressures of supply shortages and inflation drive up prices, prompting consumers to prioritize value. Pandemic behaviors give way to new norms, as omnichannel shopping becomes commonplace. Additionally, the strides made in technology enable grocers to ...

### March 2022

#### Made to Order Smoothies - US

“Functionality has been one of the most important trends within the beverage industry, and its importance has only been enhanced by the pandemic. Foodservice

#### Brand Overview: Food - UK

“The nation’s sweet tooth creates opportunities of growth for brands that consumers see as delicious and indulgent. However, attempts from the UK government to promote healthier nutritional habits make it more challenging for brands to tempt consumers with HFSS treats. As the rising cost of living puts the notion of ...

#### Baby Food and Drink - UK

“Pressure on household incomes in 2022 will erode sales of baby food, drink and milk by boosting scratch cooking and further reducing birth rates. Parent/toddler cooking kits and frozen baby/toddler food products warrant attention, given strong consumer interest and limited availability. The former’s appeal as a fun and ...

#### Carbonated Soft Drinks - US

“While a less than healthy reputation has yet to dramatically impact participation in the category, the bevy of healthy competitors in the wider non-alcoholic beverage market will always remain a threat to loss of occasions for CSDs. Renewed focus, reformulations and flavor innovation have guided brands through a competitive and ...

#### Online Grocery Retailing - UK

“The online grocery market defied expectations in 2021 by putting on further growth following the monumental uptick in demand caused by the pandemic in 2020.

## Food and Drink - International

occasions will be up for grabs as consumers re-engage with a blend of pre-pandemic and “post”-pandemic habits, especially as consumers ramp up on out-of-home and ...

### Attitudes towards HFSS Food & Drink - UK

“Restrictions on the promotion of HFSS food and drink are due to kick in from October 2022 and will hit the visibility of products under the categories covered. Categories where a very high proportion of products are HFSS, such as chocolate, crisps and cakes, will be hardest hit, especially because ...

### Quick Service Restaurants - US

“QSR offerings and services, both on and off-premise, are rapidly evolving as automation and technological investments become ubiquitous in the industry. These are necessary investments that lend QSRs the opportunity to deliver a highly efficient and personalized experience to their customers, whose needs for value and convenience are now elevated ...

### Nutrition Drinks - US

“The time is ripe for nutrition brands to shine. Two years into a pandemic, consumers are primed for solutions that will set them on the path to health. Leading into the pandemic, general functionality sufficed as a calling card. Moving forward, consumers will be discerning of brands and ingredients, and ...

### Fish and Shellfish - US

“The intimidation factor is a strong deterrent that is hampering more diverse participation in the fish and shellfish category and, despite some cooking burnout, it’s time to address the issue. Rising food prices coupled with unprecedented labor issues are forcing foodservice operators to scramble to recover from the fallout of ...

Rebalancing between stores and online will come in 2022, but it is clear the legacy boost to the online channel will be larger than first ...

### Yellow Fats and Oils - UK

“As with many other markets, yellow fats and edible oils sales saw a sharp uptick during the COVID-19/ coronavirus outbreak. While the lifting of restrictions should see less demand for at home meals, the income squeeze will offset this. Price rises in 2022 will provide an opportunity for own-label and ...

### Healthy Dining Trends - US

“While healthy eating and restaurant dining both took a backseat throughout much of the pandemic, consumers are now primed and ready to reengage on both fronts. Looking at the concept of health through a wider lens and considering diners’ physical and mental wellbeing alongside the wellbeing of society and the ...

### Snacking Motivations and Attitudes - US

“Most Americans snack multiple times a day, and snacking frequency is likely to continue to tick up, driven by young consumers who view snacking as playing a more central role in their dietary lives. There is ample opportunity for healthier, more nutrient-dense snacks and for non-snack foods to be recast ...

## February 2022

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

### Feeding the Family - US

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"With the 'food as medicine' concept gaining traction during the pandemic, functional benefits will be key to keeping fruit juice and smoothies on the menu during the income squeeze in 2022. Positioning these as supplement alternatives can boost usage frequency, while there is untapped potential for brands in this market ...

### Convenience Store Foodservice - US

"C-store foodservice is in a unique position, as it must first consider how gas prices will affect foot traffic. Loyalty programs are an important tool in connecting in-store purchases to paying less at the pump. Supporting other trends in-store, like BFY options, trending flavors, delivery and even sustainability helps connect ...

### Dips and Savory Spreads - US

"The time is ripe for brands to inspire and extend use occasions and frequency. Snacking and social occasions should continue to be nurtured yet updated to meet changing mealtime dynamics. The distinction between meals and snacks is eroding creating opportunities for healthy, nutrient-dense snacks that can take the place of ...

### Cooking Sauces and Pasta Sauces - UK

"As COVID restrictions lift and consumers return to workplaces and out-of-home leisure, at-home meals will be hit, including cooking and pasta sauces. The income squeeze in 2022 will limit this effect. The long-term shift to more working from home opens up everyday lunch as a new opportunity for the market ...

### Still and Sparkling Waters - US

"Packaged water is a growing market within the wider beverage industry stemming from a large base of dedicated bottled water users and increased sales of premium, flavorful, and functional waters. Water's inherent healthfulness makes it an ideal platform for functional innovation; unique functional claims not only allow water brands to ...

### Snack, Nutrition and Performance Bars - US

"Feeding the family is largely about meeting the needs of parents. Effective brands will need to concentrate more on being healthy and convenient solutions for time-strapped parents and less on being indulgent treats for kids."

### In-store Bakery - US

"The in-store bakery pulled itself up from the loss faced during early pandemic months to post a record year of sales growth in 2021. In the context of prolonged elevated reliance on retailers and at-home food, a spotlight is shining on all grocery categories that can help consumers break the ...

### Lunchtime Foods in Retail - UK

"The easing of COVID-19 restrictions from summer 2021 has enabled lunchtime foods in retail to begin to recover from the significant blow that the pandemic dealt on them. Whilst the income squeeze in 2022 will push some to scrutinise these purchases more closely, longer-term opportunities lie in the at-home lunch ...

### Crisps, Savoury Snacks and Nuts - UK

"While there is much openness to healthier products among users of crisps, savoury snacks and nuts, taste takes priority over healthiness for most. While curbs on volume promotions under incoming regulations will have a limited impact on the market, the loss of in-store visibility for HFSS food and drink ...

### Full-service Restaurants - US

"Nimble and innovative full-service restaurant operators are strengthening their off-premise operations to serve expanded consumer needs for value, safety and convenience. Consumers' enthusiasm for dining out is driving much of the segment's recovery and lends operators the opportunity to differentiate on experience. As the segment continues to battle inflation, supply ...

### Potato and Tortilla Chips - US

## Food and Drink - International

"Following loss brought on by steep pandemic-driven decline in away-from-home and on-the-go eating, with the help of evolved strategies for boosting at-home usage, the bars category has begun an uphill climb. Total recovery and future success are reliant on the ability for bar brands to meet next-normal needs, not just ...

### Attitudes towards Premium Alcoholic Drinks - UK

"Although losing on-trade sales, premium alcoholic drinks' retail sales benefited from the overall growth in retail alcohol drinks sales in 2020, sustained in 2021, amid the COVID-19 restrictions. The segment also gained users from shoppers trading up. However, sales are now under threat amid the income squeeze. Encouraging recommendations and ...

"Consumption of potato and tortilla chips is nearly universal, and the category saw an 8% increase in 2020. The next year will see sales correct and, by 2023, resume their pre-pandemic pace of slow but steady growth, fueled by interest in on-the-go snacking options and chips that can offer flavors ...

### Salty Snacks - US

"Snacking has remained strong in 2021. In pursuit of craveable, hunger-satiating treats, some turn to familiar tastes, while others, especially younger consumers, embrace innovation and spicy, international flavors. Interest in BFY options as well as more environmentally friendly products is driving innovation among fast-growing alternative salty snacks. While the pandemic ...

## January 2022

### Foodservice in Retail - US

"Foodservice in retail suffered in the early stages of the pandemic, but the forces that made foodservice a priority for grocery retailers before the pandemic are as strong as ever. Retailers compete against an ever-widening array of convenient meal options and must meet shoppers' elevated expectations for variety, quality and ...

### Family Dining Trends - US

"Amidst a struggling industry, foodservice operators can lean on families in the return to growth. Beyond procurement enhancements, restaurant operators must place greater emphasis on developing menu variety – giving kids more than the status quo meal. To win family dining business, restaurant operators must focus on speed and convenience ...

### Fish and Shellfish - UK

"Increased cooking from scratch and at-home meal occasions during COVID-19 gave the fish/shellfish market a considerable boost in 2020. That fish/shellfish is seen in a more favourable light in terms of health compared to meat should also help the market tap into heightened interest in health. Whilst an ...

### Beer - UK

"After a tough couple of years owing to the COVID-19 pandemic, beer brands can look to the future and tap into the sense of adventure felt amongst beer drinkers: 59% say they enjoy experimenting with new types of beer. This indicates a pressing need for brands to continue to innovate ...