

September 2018

## Tea and RTD Tea - US

"The vast majority of adults drink tea and many are daily tea drinkers. The complex array of tea formats, varieties, and flavors offers options that appeal to a broad spectrum of consumers. Yet category sales improved only slightly from 2017-18, as sales softened in the leading canned/bottled RTD (ready ...

## Eating Out Review - UK

"Foodservice operators that base their strategy around promotions are not doing enough to stand out. Brands also need to show that they care about the well-being of their customers by responding with menu choices that cater to healthy lifestyles."

- Trish Caddy, Foodservice Analyst

## Better For You Snacking - US

"The increasing prevalence of snacking creates an opportunity for healthier, more nutritious snacks. And with relatively low usage incidence of many newer types of better-for-you snacks, there's plenty of room for further growth. For better-for-you snack makers, new use occasions and pairings and exciting new flavors represent paths to increased ...

## Meat-free Foods - UK

"The UK's overarching health trend and the focus on the environmental impacts of meat production have underpinned strong growth in the meat-free foods market. 'Clean labels' and greater clarity over the ingredients used are needed to build consumer trust, while innovative products targeting the 'foodie' consumer can inject more excitement ...

## Vitamins, Minerals and Supplements - US

"The pace of growth for the VMS (vitamins, minerals, and supplements) market remains steady, as sales are estimated to increase by 5.1% in 2018, reaching \$24.5 billion. Yet consumer emphasis on value and lack of product understanding are a challenge to the category. To best position themselves, category ...

## Food and Non-food Discounters - UK

"Overall the discount sector remains one of UK retail's key growth areas. However, it is increasingly becoming a tale of two sides. The food discounters continue to put on exceptional growth, helped by store openings and the success of newer ranges such as premium. On the non-food side growth continues ...

## The Private Label Food Consumer - UK

"Despite facing undeniable – and significant – headwinds, it is by no means all doom and gloom for brands. Nurturing perceptions of offering the ultimate in enjoyment, a unique taste, superior quality, and exciting flavours will be key to promoting brand loyalty. That brands are still seen to have the ...

## Bread - UK

"That only a minority of consumers care about good value for most occasions when they eat bread reflects the relatively small role of bread in the overall food budget. This shows the scope for operators in this market to compete on factors other than price, exploring added value attributes to ...

## Coffee - UK

"Coffee drinking is ingrained among Brits, with usage on-par with the quintessentially British tea. However, a plateauing in pod machine ownership has put the brakes on coffee pods' growth and slowed the overall volume performance. Reusable pods could polish the green credentials of pod machines and appeal to those put ...

## Cheese - US

"With sales of \$23.6 billion, the cheese category's true challenge is in growing off of such a considerable sales base, since consumers already widely turn to cheese either as a snack or a recipe component. Recent years of dollar sales stagnation have been largely the result of commodity ...

### Vitamins and Supplements - UK

"The ongoing consumer focus on health and the continued success of demographic-specific supplements have supported growth in the vitamins and supplements category. However, with the majority of adults questioning the health promises made, improving trust is needed if the category is to grow its market penetration. Meanwhile, personalised subscriptions could ...

### Restaurant Breakfast and Brunch Trends - US

"Breakfast habits are shifting to fit consumers' busy schedules and include more snacking, less traditional breakfast foods, and eating on-the-go during the morning hours. Operators should stress the productivity and health benefits of breakfast to appeal to the growing number of young consumers less likely to prioritize the morning meal ...

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

"Products in the \$3.9 billion nut-based and sweet spreads category enjoy nearly universal penetration as well as solid consumption frequency, in large part due to the popularity and dominance of peanut butter. Yet sales growth has been modest in the past five years for both segments, likely an implication ...

### Burger and Chicken Restaurants - UK

"The biggest threat to the popularity of burger and chicken is the trend of consumers cutting back on eating meat. This is being driven by Younger Millennials who have either adopted a full-time vegan lifestyle or are simply eating more plant-based dishes. Operators now need to tackle this issue by ...

### Dark Spirits and Liqueurs - UK

"Friend/family recommendations and tasting sessions stand out as key means to drive dark spirits trial. Companies can incentivise recommendations through rewards such as discount vouchers and marketing messages themed around knowledge sharing. Meanwhile sampling initiatives would help to overcome the barrier of spirits' high price discouraging experimentation among risk-averse ...

### Dairy and Non-dairy Milk - US

"Milk is characterized by two vastly different markets: the large but declining dairy milk market and the much smaller but fast-growing non-dairy milk market. While dairy milk remains a household staple for most Americans, non-dairy milk is quickly gaining popularity as a more healthful alternative to dairy milk, and innovative ...

### The Leisure Outlook - Quarterly Update - UK

"Consumers are reprioritising their leisure spending towards sharing experiences and habitual leisure activities, including frequent visits to pubs for drinks, working out in a gym and buying takeaways. Meanwhile, England's success in the FIFA World Cup combined with the recent heatmap has helped boost the UK leisure economy."

— ...

**August 2018**

### Breakfast Cereals - UK

"Lack of excitement and busy lifestyles are barriers to people not eating breakfast cereals more often. More on-

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

## Food and Drink - International

the-go formats should help cereals to stay on the menu among people who don't have time to eat breakfast at home, while separate toppings are one way of adding more excitement to the ...

### Better for You Eating Trends - US

"Most consumers report that they try to maintain a healthy diet at least some of the time, making better-for-you food and beverage claims potentially motivating to a wide audience. Still, while what's healthy or better-for-you can mean different things to different consumers, there are overarching opportunities to highlight freshness, simplicity ...

### Nuts, Seeds and Trail Mix - US

"Nuts, seeds, and trail mix benefit from a relatively healthy, not to mention natural, reputation. Brands leveraging such a reputation should be well-positioned to capitalize on increasing consumer interest in snacking and on healthier snack options, in particular. The challenge for the category will be in offering options that not ...

### Attitudes towards Craft Alcoholic Drinks - UK

"Where craft brands enjoy a decided advantage over standard ones is the positive emotions they spark among users. Underpinning this is a perception of craft brands as supporting their local economy. Marketing messages presenting their company as part of a wider community would help craft producers to leverage this perception ...

"Consumers continue to worry about the impact Brexit will have on the UK economy. But people are still focussing much more on their own financial situations, which are currently in a pretty healthy state. The base rate rise will make it harder for some, but the general outlook is positive ...

### Pet Food - UK

"The desire to pamper pets has underpinned the continuous value sales growth in the market, with NPD often reflecting trends in the human food market. This bodes well for emerging pet food types such as high protein and plant-based. However, proving their worth, particularly in terms of their health credentials ...

### Pet Food & Pet Care Retailing - UK

"The pet food and pet care industry is growing well, underpinned by stable pet ownership and an increasing desire to treat pets with premium food, products and services as pets become a more integral part of the family. With the rise of services there is an opportunity for both specialist ...

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

"Visits to foodservice venues are driven mostly by discounts, which puts pressure on operators to maintain trading levels. While promotional activities remain prevalent, there is potential for these to be specifically targeted at celebratory occasions. Meanwhile, chain operators can't rely solely on the convenience of their high street locations. Instead ...

## July 2018

### Pet Food - US

"The pet food market continues to grow at a slow, steady pace, driven by premiumization and treating as pet owners look to give their pets, viewed as cherished members of the family, the best. Increasingly, pet owners are looking for pet food and treats that measure up to their own ...

### Coffee - US

"The \$14.4 billion coffee market continues on a positive path in 2018, buoyed by a thriving RTD (ready-to-drink) coffee segment and sustained growth in single-serve formats. Millennials show strong category engagement, consuming a range of coffee products and show strong interest in innovative offerings, including RTD coffees with new ...

### Tea and Other Hot Drinks - UK

### Breakfast Foods - US

## Food and Drink - International

“While Britons continue to live up to their reputation of being a nation of tea drinkers, volume sales for ordinary teabags, which dominate the market, are down, the competition from coffee and soft drinks eroding sales. While ordinary teabags remain their core offering, operators are developing their mix of products ...

“Boosting the importance of breakfast is in order. Only about half of US adults think breakfast is more important than lunch or dinner, down from 2014, and less than half say it sets the tone for their day. Nevertheless, consumption is high. Opportunity for portable options is strong, with few ...

### Breakfast Eating Habits - UK

“Breakfast habits are becoming more fragmented. Busy lifestyles are seeing people skip this important meal, eat it on the go or graze their way through the morning, fuelling demand for convenient products that can be eaten quickly and easily. Meanwhile, when time permits, brunch offers an attractive opportunity for people ...

### Yogurt and Yogurt Drinks - UK

“Environmentally friendly products such as with recycled packaging or sustainable farming guarantees attract strong consumer interest but are underexplored within the category. The public focus on plastic’s impact on the environment makes such packaging innovation timely. Meanwhile sustainable farming guarantees allow companies to boost their image as socially responsible.”  
...

### Consumers and the Economic Outlook - US

“Consumers remain confident in their financial health and anticipate little change in the coming year, resulting in stable patterns of financial opinions and behaviors. Consumers hope to save for the future while also maintaining spending levels that accommodate their current lifestyle. This Report looks at the role credit score plays ...

### Coffee and Tea on Premise - US

“The foodservice coffee market is highly competitive and many large coffee brands are starting to experience a slowdown in sales due to saturation. However, the incidence of consumers buying coffee away from home has grown, with increased consumption coming from new drink trial. The future of the foodservice market will ...

### Packaged Bread - US

“Participation is rather steadfast which is proving to be a help and a hindrance to performance in the \$21 billion packaged bread category. Sales have remained modestly positive despite the lingering popularity of low carb diets, yet the bulk of consumers are stuck in a holding pattern – neither increasing ...

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

“The influx of premium launches has underpinned the strong growth in the market, while NPD in healthy ready meals has also tapped into the overarching health trend. The return of salt to media headlines, however, will ramp up pressure on companies to try to reduce the salt content of products ...

### Attitudes towards Cooking in the Home - UK

“People’s preference for cooking over prepared meals, and for meals which are quick and easy to prepare, fuels considerable demand for products offering shortcuts to preparing/cooking meals. Home cooks are also looking for more meal inspiration when doing their grocery shopping, and retailers can help here through offering more ...