

## December 2012

### Non-chocolate Confectionery - US

“The non-chocolate confectionery category is in a position to drive perceptions of the healthfulness of product offerings, and to suggest responsible category participation, rather than suffering from consumer flight due to health concerns.”

### RTD Smoothies - US

“The RTD smoothie category is characterized by low market penetration, especially in comparison to that of made-to-order smoothies. The good news for RTD smoothie makers is that they can use the heightened consumer exposure to smoothie brought about by the popularity of fast-food smoothies to increase consumer awareness of RTD ...

### Gum, Mints and Breath Fresheners - US

“When it comes to gum, mints and breath fresheners, flavor remains the most important attribute consumers are seeking. However, an increased consumer desire for getting a benefit from everything they ingest has raised a demand for functional benefits. Therefore, while some strides have been made in this area, manufacturers need ...

## November 2012

### Attitudes Toward Kids' and Teens' Snacking - US

“While kids still favor indulgent snacks and many buy their own, increasing efforts by all levels of government to encourage more healthful eating habits, coupled with parents' desires to feed their children healthier foods, are continuing to put pressure on manufacturers. Therefore, by proactively developing new products with healthier nutritional ...

### Poultry - US

“Nearly half of respondents say they would like to see more recipes on poultry packaging, but such interests might be better served if healthy recipes were offered at point of sale. This entails brands cooperating with retailers.”

## October 2012

### Fish and Seafood - US

“In order to increase the frequency of consumption of fish at home, manufacturers and retailers do have an opportunity to better compete with restaurants by introducing more premium offerings and emphasizing quality. At the same time, highlighting specific nutritional attributes that would benefit adults and children alike could be another ...

### Cooking Enthusiasts - US

“Cooking at home is an activity that many Americans have accepted as a part of their weekly routines. However, despite being interested in taking an experimental approach to cooking, most are likely to stick to what they know. The key to increasing overall enthusiasm for cooking is likely to lie ...

### Red Meat - US

“While demand for beef is slowly waning, producers may be able to drive sales by making greater efforts to show how lean beef and pork can be paired with vegetables, high-fiber grains, and other nutrient-rich foods to create healthy and well-balanced meals. Some also can work to frame beef as ...

### September 2012

#### Sandwiches, Subs and Wraps - US

Despite the recession, the sandwich shop segment has fared well, meeting the changing needs of consumers. Sandwich shops offer better-for-you and gourmet-like options, as well as upscale décor at lower prices than full-service restaurants, striking a balance between quick service and casual dining. These concepts also meet busy on-the-go consumers ...

#### Breakfast Foods - US

The estimated \$12.5 billion breakfast foods category has experienced positive performance in recent years, posting gains of 19.5% in dollar sales from 2007-11. The category has likely benefited from an increased convenience factor, coupled with a strong private label presence and aggressive product innovation, at least in some ...

#### Sugar and Sweeteners - US

The sugar and sweeteners market has fared well during the volatile economic climate of the past five years, mainly carried by the market's leading segment: sugar. In spite of the national focus on health and obesity, sugar sales have not suffered. However, the obesity epidemic, along with interest in all ...

### August 2012

#### Condiments - US

Sales of condiments grew by 15% from 2007-12 (4% when adjusted for inflation), with the sharpest jumps coinciding with the onslaught of the recession. The category saw sales increase by 5.6% in 2008 and 6.2% in 2009. This is a clear indication that condiment sales can sustain periods ...

#### Bread - US

Retail sales of bread and bread products are expected to reach nearly \$21.6 billion in 2012, making it one of the largest food categories in the U.S and one that is critical to both retailers and manufacturers around the nation. However, it is also one of the most ...

#### Vending - US

In the coming years, growth in the U.S. vending industry will likely depend on manufacturers' and retailers' ability to develop technologically innovative machines and expand product offerings to include more novelty foods, as well as non-consumables. Cold beverages, candy and snacks continue to drive sales in the food and ...

#### Convenience Stores - US

Mintel's proprietary research finds that overall usage of convenience stores is far-reaching, and frequency of visits is high. However, challenges exist for industry players to establish brand loyalty. A highly fragmented retail landscape and a potluck-style product mix contribute to the common consumer perception that convenience stores are “all pretty ...

### Yogurt and Yogurt Drinks - US

While sales in a variety of CPG categories declined in response to the economic downturn, the yogurt category has proven to be quite resilient. U.S. retail sales of yogurt drinks reached nearly \$6.4 billion in 2011, up 31% from 2007.

### Nuts and Dried Fruit - US

The \$7.2 billion dollar nuts and dried fruit category fared well during the recession and beyond, posting a gain of 36.1% in dollar sales from 2007-12. The category has likely benefited from the health perceptions associated with it, as well as constant innovation and a strong private label ...

## July 2012

### Pizza at Retail - US

The \$5.4 billion pizza at retail market had been steadily growing between 2006 and 2009, but started to decline in 2010 and faces more declines for the 2012-16 period. The sluggish U.S. economy has not helped the pizza at retail category. This expected performance, however, will be impacted ...

### Ice Cream and Frozen Novelties - US

The ice cream and frozen novelty market, which struggled for positive sales growth in 2009 and lost sales in 2010, turned a corner in 2011 with a 4.1% increase in total U.S. retail sales to reach \$10.7 billion. Sales are expected to increase another 4.1% in ...

## June 2012

### Baby Food and Drink - US

The \$5.4 billion baby food and drink category has been steadily declining during and after the recent recession, experiencing a dollar sales drop of 10.3% between 2007 and 2011. Consumer frugality has led many to breastfeeding and feeding their babies and toddlers adult food or made-from-scratch baby food ...

### Prepared Cakes and Pies - US

U.S. sales of prepared cakes and pies have weathered the recession and slow economic recovery with steady growth between 2007 and estimated 2012 levels. Consumers apparently have found a degree of comfort in RTE cakes and pies even as they limited spending on many other items. Still, the effect ...

### Healthy Snacking - US

At a time when America's obesity problem is receiving extensive coverage from the media, consumers are becoming more aware of the long-term potential health implications of their eating habits. Unlike some other eating occasions, snacking is most associated with fun and perhaps even indulgence, which can make it challenging for ...

### Shopping for Groceries - US

Total retail sales of groceries sold through supermarkets and drug stores reached \$337.7 billion in 2011 and are expected to reach \$347 billion in 2012. The grocery market saw a slight slowdown in 2009 and 2010 as a result of the recession, yet is positioned to grow annually through ...

### Frozen Handheld Food - US

The frozen handheld food market generated \$2.7 billion in total U.S. sales in 2011 and grew by 18% from 2006-11, outperforming many other frozen and non-frozen food sectors. Innovation and renewed interest in the breakfast segment in particular have been driving sales for this market since 2009. However ...

### The Budget Shopper - US

Popularized during the height of the recession, the term “budget shopper” referred to a consumer who was struggling to make ends meet by scrutinizing costs, weighing out the pros and cons of nearly every purchase, and making spending cutbacks wherever possible. Although the recession officially ended in 2009, consumer attitudes ...

### Cheese - US

The cheese market, which didn't fare well during the economic downturn, turned a corner in 2011 with a sales increase of 6.1%, reaching total U.S. retail sales of \$18.9 billion. Sales continue to increase in 2012, not only for private label (which benefited most in the sagging ...

## May 2012

### Frozen Snacks - US

The \$1.6 billion frozen snacks market has been steadily growing during and after the recent recession, oscillating with food price increases, suffering to some extent from the unhealthy stigma associated with frozen products, and suffering from a lack of innovation. However, the versatility of frozen snacks, coupled with increased ...

### Frozen Meals - US

In 2011, frozen meals generated an estimated \$7.9 billion in total U.S. sales and grew by a microscopic 0.6%. Nonetheless, this was a welcome change from the previous two years of declines. Given the importance of the category to both manufacturers and retailers, both sides will need ...

## April 2012

### Specialty Foods - The NASFT State of the Industry Report - The Market - US

Mintel and the National Association for the Specialty Food Trade (NASFT) have once again collaborated to produce the ninth annual *State of the Industry Report* –

### Attitudes Toward Healthy Food - US

America's collective weight problem and its impact on the country's healthcare system has been well-documented by the media. While some Americans have sought or will seek to improve their eating habits, the country's weight situation is expected to grow even worse. The Centers for Disease Control and Prevention's (CDC) *Obesity* ...

### Lunch Meat - US

Sales in the \$12.6 billion lunch meat category grew by only 1.8% in 2011 (only 0.2% when adjusted for inflation). The slowed growth is likely due to a slowdown in volume sales due to product price increases, a failure of new product innovation to resonate with consumers ...

### Dairy and Non-dairy Milk - US

Milk processors face an uphill battle, including the dominance of private labels; consumer concerns over the presence of growth hormones in non-organic milk; fluctuations in commodity prices; supply shortages for organic milk; and growing consumer concern about the

*The Market*, following the first report which published in May 2004. The purpose of this report is simply to show changes in the industry ...

safety of animal products in general. With that long list of challenges ...

### Chocolate Confectionery - US

Chocolate confectionery posted modest year over year sales growth through the recession to reach \$18.6 billion in 2011. A combination of product innovation and price increases led to a 16% gain in the category from 2006-11. Leading companies expanded their mainstay product lines by way of new formats and ...

### Cookies and Cookie Bars - US

In 2011, the cookie/cookie bar category returned to positive territory in terms of sales growth, as total U.S. sales reached an estimated \$6.4 billion. The 2.7% increase was a nice improvement from 2010, which saw sales drop by 0.7%.

### Soup - US

Recession-inspired frugality resulting in changing consumer purchase habits has conspired to soften sales in the \$6.4 billion soup industry. After sales declines in prior years, the category showed minimal growth between 2010 and 2011, with sales essentially flat.

## March 2012

### 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 ...

### 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 ...

### 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 ...

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

### 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 ...

## 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 ...

### 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 ...

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

## 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 ...

### Home Baking - US

### 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 ...

### 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.

### 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 ...

### Chips, Pretzels and Corn Snacks - US



## Food - USA

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 ...

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 ...