

### October 2010

#### Savory and Sweet Spreads - US

The \$6.5 billion market for sweet and savory spreads faces significant limitations due to its near saturation, as over 90% of households use peanut butter or jam/jelly/preserves and over 80% use butter. Mintel's report both analyzes these challenges and identifies opportunities for growth. Report insights include:

#### Frozen Meals - US

With annual sales in the billions of dollars, frozen meals have come a long way from the so-called TV dinner era. They are no longer used solely by single white males and can now be found on many families' dinner tables. The category offers a variety of price points that ...

#### Spirits: The Market - US

In this report, the second part of a two-part report on spirits, Mintel takes an in-depth market-centric view of the market. The consumer-centric view is covered in Mintel's Spirits: The Consumer—U.S., August 2010.

### September 2010

#### Soup - Europe

Soup has a lot going for it. It is viewed both as a traditional staple, and also a modern convenience food, well suited to hectic modern day living. Recipes may be timeless classics; or they may be marketed as exotic, healthier and functional concoctions suited to the clued-up 21st century ...

#### Shelf-stable Meals and Meal Kits - US

This report explores the shelf stable meal and meal kits market. The three types of products in this report: complete packaged dinner mixes (53%), can/jar

#### Carbonated Soft Drinks - Europe

This is a stable, recession-resistant market. Big brands have something of an unchallengeable institutional status. Thirst is basic, and the big alcoholic alternative, beer, is generally on long-term decline. Overall volume sales tend to expand, though more so in the less developed Eastern Europe markets, and not at all in ...

#### How are Ready Meals Targeting the Stay-at-home Consumer? - Ireland

In response to increasing demand for data concerning the dynamic economy and growth markets of Northern Ireland and The Republic of Ireland, Mintel has developed a series of reports covering a wide variety of sectors within both of these dynamic regions. Each one provides detailed coverage of key drivers as ...

#### Sandwiches, Subs, and Wraps - US

While a difficult economic environment has created a variety of challenges for sandwich shop operators, it is also clear that many consumers are seeking inexpensive restaurant dining options and sandwich shops have often been able to capitalize on this demand. Moreover, there is a kind of "health halo" around some ...

#### Coffee - US

The incidence and frequency of coffee use in the U.S. has remained very steady in recent years, which has contributed to relatively stable, moderate market growth. Indeed, while sales in many categories declined between 2008 and 2010—as millions of Americans sought ways save money in the face of recessionary ...

#### Private Label OTC Healthcare - US

While the recession has put a halt to sales growth in many large CPG product categories, overall sales of over-the-counter (OTC) remedies have continued to grow at a slow, steady pace over the last few years.

## Food and Drink - International

spaghetti/macaroni (53%) and shelf-to-microwave dinners (53%) have each maintained the same level of market penetration within 2 points during the period 2004-09 indicating ...

### Fish and Shellfish - UK

This report covers the retail market for seafood for in-home consumption. This includes fish (fin fish) and shellfish (including crustaceans), whether fresh, frozen or ambient, as well as ready-to-cook products.

### Pub Visiting - UK

The consumer leisure market has changed beyond recognition, largely due to technology and how it has made the home environment more of a focus. This greater emphasis on spending time and entertaining at home has led to greater competition in the eating out market, particularly for the spending of the ...

### Sugar and Gum Confectionery - Europe

The sugar and gum confectionery markets in the 'Big 5' European countries, namely France, Germany, Italy, Spain and the UK, as well as the rest of the Western Europe are mature, and present little opportunity for further volume growth. On the other hand, Eastern Europe and the Asia Pacific report ...

### Nuts, Seeds and Dried Fruit - UK

This report covers nuts, seeds and dried fruit, eaten as snacks and used in cooking/baking. Also included in this report are nut mixes.

### Sustainable Food and Drink - US

The sustainable food and drink market in many ways is still in its infancy. As a food movement that began decades ago simply to offer a small segment of consumers all natural and organic products, it has now developed into a multi-billion dollar platform that crosses many industries beyond agriculture.

Market share for lower-priced private label products, however, have risen sharply. The economic downturn ...

### Functional Foods - UK

The functional foods market has been enjoying healthy sales growth with value sales increasing by 3.7% between 2008 and 2009 to reach £719 million. Consumers are making greater efforts to be healthy and have greater access to information about the key foods they should be eating to stay healthy ...

### Pub Catering - UK

The pub industry remains in a state of consolidation with many of the big brands in particular rationalising their estates in order to take advantage of acquisition opportunities in other areas of the market, with the main focus on the less volatile food-led sector of the market. Therefore expansion plans ...

### Bread, Bakery and Cakes - Europe

The European bakery products markets are large and mature. Penetration of bread is almost universal. In volume terms, continental European markets are segmented almost equally between bread, and between cakes and other baked goods.

### Smoothies - UK

The smoothies category has seen its exponential growth – driven by the success of Innocent – checked in the past three years, with the economic downturn seeing many consumers switching to cheaper alternatives such as pure fruit juices.

### Spirits: The Consumer - US

In this two-part report on spirits, Mintel takes an in-depth consumer-centric view of the market. The market-centric view is covered in Mintel's Spirits: The Market—U.S., September 2010. This report provides spirit makers and marketers a glimpse into not only the consumption trends, but also consumer behavior and attitudes toward ...

## Food and Drink - International

### In-store Bakeries - US

In-store bakeries (ISBs), or on-site bakeries located in grocery stores, mass merchandisers or other food stores, are an important channel for the sale of breads, cakes and other baked goods and are expected to generate more than \$11 billion in revenue in 2010. The ISB is well positioned to take ...

### Seasonal Chocolate - US

During 2005-10, seasonal chocolate sales increased 16.3% to become a sweet and sizeable \$4.6 billion market (estimated 2010 sales figures). Positioned as a traditional indulgence, the category appears not to have been adversely affected by the wavering economy of the past few years.

### Quick Service Restaurants - US

The U.S. economy has been in recession, taking a toll on the restaurant industry. However, Quick Service Restaurants (QSRs) have been putting up a good fight, winning over customers who are trading down from other segments and luring in cash strapped consumers with a wide range of value options ...

### Pet Food - US

The American Pet Products Association (APPA) estimates that U.S. pet owners spend \$48 billion annually on their companion animals. The largest percentage of this spending can be attributed to pet food. In addition to the large volume of sales, pet food companies are attracted to the category because it ...

## August 2010

### Home Baking (Cooking and Baking from Scratch) - UK

Despite the trend towards healthy eating, consumers have taken a greater interest in home baking, driving value sales in the home baking market up by 12.7% between 2007 and 2009. The market is expected to grow by a further 9.1% in 2010, taking sales to £576 million. Consumers ...

### Attitudes Toward Sodium and High Fructose Corn Syrup Reduction - US

Recent research indicates that the majority of American adults are watching their diet. The health and wellness trend is driven by a variety of factors including an aging population and analysis suggests that as the economy improves, Americans are likely to gravitate more toward better-for-you (BFY) options such as those ...

### Table Sauces and Condiments - Europe

The table sauces market posted positive growth in the review countries, although growth rates differed depending on the maturity of the market: the UK, the Netherlands and Germany for example, all have established markets. Italy and Spain registered fast growth as well as Poland and Russia in Eastern Europe. However ...

### RTD Alcoholic Beverages - Europe

European consumption of alcoholic drinks is declining as a result of consumer drinking habits moving in favour of healthier beverages. Performance of ready-to-drink beverages (RTDs), and spirits in general, was further affected by the recession (2008-09). Their penetration has declined (except in Germany) as a result of higher prices and ...

### Ethnic Restaurants and Takeaways - UK

This report investigates consumers' use of varying types of ethnic outlets and gauges their opinion on this area of the eating out market. It also highlights what consumers feel is currently missing from the market and what they would like to see on menus going forward.

### Whiskies - UK

At £3.6 billion whisky is worth more than any other spirits market in the UK. However, the continued decline of blended whisky, which accounts for 72% of the category's volume sales, means that in the next five years it will see an 11% decline in real value sales.

## Food and Drink - International

### Beer - Europe

Across Europe, beer volumes have, in general, experienced a decline in the past year. Depressed consumer spending has been an influential factor, exacerbated by the fact that the beer market has been undergoing change. Healthier lifestyles, a widespread smoking ban and strong attacks on the binge drinking culture have led ...

### Consumer Attitudes to Drinking - UK

- Despite alcohol consumption being in decline since 2004, almost half of consumers are drinking alcohol 'once a week' or 'at least twice per week or more', demonstrating how ingrained drinking alcohol is as part of British culture.
- As consumers are going out less often but spending more when they do ...

### Carbonated Beverages - US

Overall, sales growth of carbonated soft drinks (CSDs) has been generally stagnant in recent years due to rising demand for bottled water, functional beverages (including energy drinks) and some better-for-you (BFY) alternatives. However, a few brands have reported impressive growth in the last year due in part to new distribution ...

### Chocolate Confectionery - Europe

The chocolate confectionery market, even though large and sophisticated, continues to record growth. Chocolate remains a 'treat' and this has been recognised in the further development of premium 'indulgence' lines, in the current economic climate chocolate offers a permissible luxury.

### Fast Casual Restaurants - US

The fast-casual restaurant segment of the \$580 billion foodservice industry is a tribute to the American desire to find middle ground, a hybrid that seeks to keep the best of both fast food and casual dining restaurants, while still being its own very contemporary niche. Fast casual recognizes that service ...

### Burgers - UK

This report covers burgers sold through retail outlets for consumption at home. Meat burgers include products the prime protein constituent of which is beef, lamb, pork, chicken, turkey or fish, while meat-free burgers are those made primarily of meat substitutes or vegetable matter. These substitutes include for example Quorn soya ...

### Discounters - UK

- The two most important factors in choosing a supermarket are convenience and price. Hard discounters can lead on the latter, but have to persuade consumers that they should be prepared to make a second trip to do their weekly shopping trip.
- Hard discounters do not appeal just to the poorest ...

### Bottled Water - Europe

Sales of bottled water have benefited from a general health and wellness trend, and the key European markets for bottled water have only been slightly affected by the economic recession. While Italy remains the largest market in volume terms, Germany is the largest market in terms of value.

### Seasonal and Boxed Chocolates - UK

- The importance of NPD activity and marketing support in the run up to the major festive periods cannot be underestimated as 25m adults bought boxed or seasonal chocolates as a gift for someone at Christmas while 17 million bought them at Easter.
- Manufacturers should look to develop packing options that ...

### Tea - Europe

Tea is increasingly popular across Europe due to its healthy image. Its appeal has increased among young people as well as older age groups. All types of tea are benefiting from strong NPD and more sophisticated segmentation, which has stimulated value-added growth.

## Food and Drink - International

### Salty Snacks - Europe

The UK salty snacks market is over twice the size of any other key European market, thanks to the Britons' love of potato crisps. Throughout the 'Big 5', however, sales have grown, supported by busier lifestyles, which have led to increased snacking, including on-the-go, and the growing availability and popularity ...

### Butter, Yellow Fats and Oils - Europe

Butter markets across Europe tend to be mature and stable, growing only slowly. Butter is regaining ground, as consumers regain trust and taste for a product that was once vilified for its unhealthiness. People are moving away from the old style of calorie-counting towards a more holistic understanding of health ...

### Pet Food - Europe

Key European pet food markets have been characterised by increasing product segmentation in recent years, which has helped maintain value growth in spite of an economic recession. Product offer has become highly sophisticated with cat and dog food tailored according to the pet's age, gender, breed, health and lifestyle. Consequently ...

## July 2010

### Roadside Catering - UK

Despite the inroads made by the increased role of brands at Motorway Service Areas (MSAs), the market remains dogged by consumers' preconceived ideas of the high prices, poor quality and overall poor value for money available, the latter being particularly significant during a period of economic instability.

### Condiments - US

One of the many ramifications of the recession has been an increase in meals consumed at home and prepared by the consumer. Condiments have benefited greatly. No wonder; condiments can be simply served with food or incorporated into from-scratch recipes, depending on the consumer's commitment to cooking or their need ...

### Chocolate Confectionery - Ireland

Chocolate manufacturers have had to respond to the effects of the recession in order to maintain performance. As a result, the retail value of sales in both RoI and NI markets increased marginally in 2009. According to trade sources, consumers perceive chocolate to be an affordable luxury in a depressed ...

### Baby Food and Drink - Europe

Value sales of baby foods and drinks have continued to report positive growth in Europe, supported by added-value products. The market performed well, despite the recession, with parents ready to pay more for premium products, in order to ensure their baby's health and wellbeing.

Volume sales have been hindered by ...

### Biscuits, Cookies and Crackers - Europe

European biscuit markets have continued to grow in spite of the economic recession. During a time of economic hardship, many consumers see biscuits as an affordable luxury and a comforting treat. The UK market remains the largest market for biscuits, with sales approaching £2.2 billion, thanks to high penetration ...

### Coffee - Europe

Coffee tastes and perceptions are changing fast. Both Western and Eastern European countries have seen an explosion of trendy coffee shops over the past decade. Coffee has become a fashionable lifestyle drink and consumers across Europe are demanding products that allow them to replicate the coffee shop experience at home.

## Food and Drink - International

### Poultry and Game Meat - UK

The poultry sector saw volume sales decline for a number of years under pressure from bird flu and rapidly rising inflation. However, the poultry market has regained momentum in the recession, enjoying a strong image as easy to cook, versatile and better value for money than red meat.

### Wine, Cocktail and Champagne Bars - UK

- British out-of-home drinkers are habitual with seven out of ten stating that they usually drink the same thing.
- The theatre of cocktail making is the main draw for two thirds of the 6.5 million consumers that have drunk cocktail in the last year.
- Just under 4 million cocktail drinkers ...

### Pies and Pasties - UK

- As a good value and filling meal option, the pies & pasties category has performed well during the recession with value sales climbing by 5.2% between 2007 and 2009 to reach an estimated £941m in 2009
- An opportunity exist to grow the market by increasing frequency of consumption among ...

### Breakfast Cereals - Europe

Breakfast cereals enjoy high penetration and frequency of consumption in the UK, whereas in the rest of Europe (France, Germany, Italy and Spain) levels are much lower. Unsurprisingly, growth rates have flattened in the mature, developed UK market. The recession has led to consumers opting for cheaper breakfast alternatives or ...

### Energy Drinks and Shots - US

This report focuses on the energy drinks and shots market. While energy drinks have enjoyed significant popularity since their inception during the late 1990s, category growth appears to have cooled off during 2007-09. The current economic upheaval has negatively influenced the category, and a lack of universal appeal for energy ...

### Cordials and Squashes - UK

The squash/cordials market was in slow but steady decline until the economic downturn radically changed consumer purchasing habits, with value overriding the desire for premium and healthy soft drink products.

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

This report encompasses three years of sales data (2007-09) across 47 segments (though most often the tabulations discuss the primary 41 segments), and discusses the positive and negative factors that may have a bearing on each segment's future growth or decline. Also included in this report is a comprehensive look ...

### Private Label Cereal - US

Despite recent evidence that the economy may slowly be coming out of a deep recession, consumers are still wary and have been more cautious with their spending. This has translated to opportunities for private label manufacturers, which offer products at lower prices than name-brand equivalents. In categories such as cereal ...

### Ice Cream - Europe

This report covers both take-home and impulse ice cream markets. Impulse ice cream is defined as single-serve ice creams purchased for immediate consumption. Take-home ice cream is defined as any product that comprises primarily ice cream and is intended for consumption in the home, as opposed to an impulse purchase ...