

March 2015

Agricultural Machinery - UK

"The UK market for agricultural machinery is expected to contract by 3% in real terms in 2015, as falling commodity prices in 2014 are likely to negatively affect spending levels during the current year. Between 2016 and 2019 agricultural machinery demand is anticipated to demonstrate moderate annual growth. Market development ...

Airlines Worldwide - International

This report provides an update and outlook concerning trends in the international air transport industry. Airport relations, profitability, as well as trends concerning distribution, fleet development of the major airlines, frequent-flyer programmes and cabin design, are just some of the issues treated in detail in the report. In the conclusion ...

Attitudes towards Emerging Cuisines - UK

"While penetration of emerging cuisines is still low, interest is high. The presence of emerging cuisine restaurants on the high street is growing while there is greater focus from retailers like M&S on expanding their ethnic offering. These trends are helping to bring the less established cuisines into the spotlight ...

Attitudes towards Technology in Financial Services - Canada

"Consumers are looking for new ways to interact with their banks though slower to embrace mobile transactions. While incentives may help to encourage the adoption of mobile banking actions, communicating course of actions and safeguards in-place in case of security breaches should help positively influence adoption of mobile transactions." ...

Beauty Devices - US

"There is disparity in the beauty devices market, with sales of skincare devices gaining momentum, while growth in the hair appliance market is stagnant. The

Air Care - US

"To help encourage growth, market players must combat cannibalization within the category by promoting complementing suites of products for greater efficacy, focus on improving the multifunctional capabilities of air care products."

Attitudes to Home-delivery and Takeaway Food - UK

"Some concerns still linger about the quality of food offered by UK takeaway operators. Leveraging the demand for fresh and 'real' home-delivered food should help operators to increase their competitiveness in this market."

– **Helena Childe, Senior Foodservice Analyst**

Attitudes towards Premium Alcoholic Drinks - UK

"As many consumers appear to have become savvier and more discerning, brands need to move beyond attaching a generic premium claim to their drinks."

– **Chris Wisson, Senior Drinks Analyst**

Babies' and Children's Personal Care Products, Nappies and Wipes - UK

"As the baby boom shows evidence of coming to an end, it may be more relevant for the category to focus on toddlers rather than new-borns. Extending product ranges for older children and offering greater product segmentation by age could be a way to ensure the category shows growth. Greater ...

Beauty Retailing - China

"The China beauty retailing market is evolving fast with both supply and demand side driven by the online-to-offline movement.

promise of professional results at home is helping to drive sales of skincare devices."

Bicycles - UK

"With the increase in average spend on bikes and growing demand at the premium end of the market, there is potential for a different approach to obtaining the use of a top-end bicycle. Additionally, while industry sourcing strategies are well-established, there is an opportunity for a more agile supply chain ...

Bottled Water - China

"Despite bottled water being a drink suitable for on-the-go occasions, at-home usage could be the next growth engine for the largely saturated market, in particular when it comes to premium bottled water.

Bottled Water - US

"Although convenience/PET bottled water accounts for a majority share of bottled water sales, the sparkling water category is growing at a far more rapid pace as consumers look for alternatives to CSDs and other sugary drinks. Convenience/PET brands may need to focus more on enhanced water to significantly ...

Car Model Preferences - China

"The new passenger car market in China has experienced a significant leap in the past few years. As a consequence, the market has become more sophisticated and complex than ever. Consumers are also becoming more diversified in their needs for cars. This requires businesses to adopt different marketing methods to ...

Casinos and Bingo - UK

"Bingo clubs can look to make their venues more versatile and take the game on the road to refresh their player base and increase visibility to younger potential customers."

– David Walmsley, Senior Leisure Analyst

Biscuits, Cookies and Crackers - China

"Although not many men shout out 'I love sweet snacks', from their consumption behaviour of biscuits, men are even more in favour of sweet flavour than women, presenting opportunities for biscuit brands to better appeal to male consumers via marketing communications, packaging and product innovations."

– Hao Qiu, Research ...

Bottled Water - UK

"That the concept of water filling stations resonates with almost four in 10 bottled water users indicates that opportunities are ripe for brands to explore this scheme. As well as helping to position companies as forward thinking and socially responsible, such a move would be in tune with the younger ...

Buy-to-let Mortgages - UK

"For the majority of people who will benefit from the pensions freedoms, a buy-to-let investment is unlikely to be either a viable or an enticing investment option. Even ignoring funding complications, the perceived hassle of being a landlord puts many off. As Mintel's data reveals, among those already retired and ...

Carnes Processadas - Brazil

"Embora o consumo de carnes processadas esteja aumentando entre os brasileiros, eles ainda preferem comprar carne crua. Além disso, o preço desempenha um papel importante na compra de carnes processadas. O lançamento de novos sabores em formatos conhecidos, como salsichas e carne para hambúrguer, pode fazer com que os brasileiros ...

Cleaning the House - China

"Providing not just effective household cleaning products but also professional cleaning services could help brands to stand out of the crowded and form consumers' cleaning habits and brand stickiness."

– Ivy Jiang, Research Analyst

Cleaning the Kitchen - UK

“As well as concentrating on increasing sales through encouraging more frequent usage of kitchen cleaners for a range of tasks around the kitchen, brands should focus on product development in antibacterial products to cater for strong interest in all-natural and longer-lasting protection. Opportunities also exist for driving added value through ...

Consumer Lending - Canada

“Leveraging the goodwill generated through customer interactions while selling complex products such as mortgages, can be a catalyst for the sale of other lending products.”

– **Sanjay Sharma, Senior Financial Services Analyst**

Consumer Spending Priorities - China

“The Chinese economy grew by 7.4% in 2014, the lowest rate since 1990. According to the government, the goal of economic growth has been adjusted to around 7% a year during the 13th five-year plan from 2016 to 2020. This suggests that slower growth rates than previously recorded will ...

Digital Trends Spring - UK

“Consumers are becoming more sensitive about their online identity, with high-profile security lapses causing them to question companies’ ability to keep their data safe.

Fruit and Vegetables - Ireland

“Ongoing price wars within the fruit and vegetable sector have been to the benefit of Irish shoppers, but to the detriment of the market value of the fruit and vegetable sector in Ireland. However, volume sales of produce have improved between 2013 and 2014, as Irish consumers increasingly try to ...

Grilling and Barbecuing - US

Construction - UK

“The construction market consistently exaggerates economic development when there is an upturn, which often leads to prolific market growth. This inevitably means that skills shortages emerge, with material shortages also reported in the house building sector, which was the first to emerge from the previous downturn.”

– **Terry Leggett ...**

Consumer Snacking - UK

“Despite the interest in added value snacks, the current offering is limited when it comes to various health-related factors. However, with spending habits predicted to relax, operators could be missing out on consumers being better able to trade up to these types of products.”

– **Colette Warren, Food and ...**

Convenience Store Foodservice - US

“While some consumers have a less-than-stellar opinion of c-store foodservice, this sentiment is beginning to wane, especially among younger consumers. Now is the time for c-store operators to showcase their new food and drink capabilities that can rival those of quick service, be just as fresh as fast casual, and ...

European Retail Briefing - Europe

This month, ERB includes:

Gas Supply and Distribution - UK

“Ofgem has adopted a new regulatory framework for the current price control period for gas distribution and transmission networks, known as the RIIO model. A key element of the RIIO approach is that it gives greater focus to incentives and innovation than the previous regulatory regime. This means new technologies ...

Hispanic Consumers' Snacking Preferences - US

“Grill companies need to put the ‘fun’ in functional. Most consumers see grills as cooking tools akin to kitchen appliances, but they do not always think grills are worth the cost. Companies that want to counteract this negative perception, increase brand loyalty, and increase sales must position grills as useful ...

Holiday Review - UK

“Active professionals looking for adventure holidays and city breaks, affluent families seeking to take advantage of likely fare reductions and APD tax rate cuts on long-haul trips, and over-55s buying cruises, upmarket escorted tours and cultural/historical trips are likely to be among the most lucrative travel markets in the ...

Lifestyles of Young Families - US

“Young families in America are facing a slew of challenges, from the rising cost of childcare to the increasing necessity of two incomes to support a family comfortably. Despite these challenges, young parents seem motivated and optimistic. They are focused on saving for the future and even hope to purchase ...

Made to Order: Smoothies and Shakes - US

“Foodservice operators who focus primarily on smoothies are experiencing competition from brands that are not smoothie-centric, retail products, and consumers preparing their own smoothies at home. Operators need to show consumers their products have value, by offering fresh ingredients, produce that consumers may find hard to source, or items that ...

Menswear - UK

“The men’s clothing market has been growing at a faster rate than womenswear. Discounting has been a big issue across the clothing sector, but menswear is likely to have benefited from fewer men being interested in special offers than women.”

– **Tamara Sender, Senior Fashion Analyst**

Mortgages - Ireland

“The importance that Hispanics give to the requests of family members – including children – is significant. If they are not on board, snack types and brands gradually surrender their space in the household to others. This is why the brands consumed in Hispanic households tend to change as they ...

Lifestyles of the Sandwich Generation - UK

“As the Sandwich Generation grows, providing additional support to those caring for both children and parents, as well as providing them with opportunities to take time out for themselves, will be essential. But there is also value in bringing these multi-generational family structures together, allowing them to build strong emotional ...

Living and Dining Room Furniture - UK

“Our research confirms that people who rent their homes from private landlords move regularly and are in the market to buy their own furniture. So there is huge potential to sell furniture that is easier to move. And fewer homes will have enough space to accommodate dining furniture or multiple ...

Mass Merchandisers - US

“Mass merchandisers are well-positioned to continue being a primary part of customers’ shopping journeys because of consumers’ continued emphasis on wanting value and convenient shopping solutions. However, it appears that all the key retailers are focused on the same initiatives including small store format expansion, adding services like in-store pickup ...

Mobile Network Providers - US

“The majority of consumers are satisfied with their cellular services, and satisfaction is fairly high across a number of service elements. This places a large amount of pricing pressure on mobile network providers. However, consumers still expect value for their money, and most are not loyal to their carriers, thus ...

Mortgages - UK

“After years of decline and contraction, growth and momentum has returned to the Irish property market, which has, in turn, fostered confidence and positivity among Irish consumers. Once again, purchasing residential property in Ireland looks to be attractive and consumers view a mortgage loan as an opportunity rather than a ...

Motor Insurance - UK

“Motor insurers have endured a prolonged period of difficult trading conditions, characterised by falling average premiums. However, improved household finances will provide a more accepting environment for insurers to introduce premium rises in the coming year, returning the market to growth.”

National Newspapers - UK

“Compensating for declining circulation revenue without raising cover prices continues to be a struggle for newspapers. Going forward, the best option for boosting digital revenue may be a ‘soft’ paywall, where more exclusive digital products are made paid-for, while basic news remains free in order to keep audience reach high ...

Nut-based Spreads and Sweet Spreads - US

“Product innovation by way of added nutrition, natural ingredients, and new flavors, combined with a focus on key demographics, may help boost category sales, especially within the sweet spreads segment.”

– Amanda Topper, Food Analyst

Online Grocery Retailing - UK

“The online sector is starting to mature – this way of shopping for food is not for everyone. That is good news for retailers as they have a vested interest in customers using their physical stores where they can market opportunistic buys more effectively and encourage impulse purchasing. In contrast ...

Organic Food Preferences - China

“The costs of renting put such a strain on people’s finances that home ownership starts to seem like an impossible dream. The negative consequences of this can be combated if more lenders work with savings providers and government initiatives to help renters take proactive steps towards saving for their first ...

Nappies and Baby Wipes - China

“When it comes to baby care-related matters, safety remains the top concern for mothers. Seemingly a simple formula, brands are making extra efforts to optimise purity and natural-focus in product ingredients and scents as a way to rebuild consumer confidence. As opposed to added benefits such as nourishing skin provided ...

Non-alcoholic Water Enhancers - US

“An abundance of beverage launches and continued category blurring is creating RTD products that cater to every user need requiring less self-customization. Consumers gravitating toward natural trends further harm the category.”

Online and Mobile Retailing - Ireland

“In 2015 online and mobile retail is an activity that consumers are more likely to engage in whilst in the home, with laptop/desktop computers being the main purchasing devices. Increasing consumers’ confidence in online shopping outside the home, and offering a high quality and value-added experience when using mobile ...

Organic Food and Beverage Shoppers - US

“Considering the typically higher cost of organic foods and beverages, consumers are increasingly hard pressed to justify the added expense. As such, sales have hit something of a plateau, where they likely will remain until consumers have a clear reason to turn to organics.”

– William Roberts, Jr., Senior ...

Pay TV and Home Communication Services - US

“The organic food market in China is tiny; yet it is also developing quickly thanks to the growing consumer interest in this sector driven by an increasing level of attention that people pay towards health and wellbeing.

“With households trimming and cutting television service, providers will likely set sights on continued capital expenditure for and marketing of ultra-high speed internet. Significant questions hang over this strategy: do households need that speed, and how much more will they be willing to pay for it?”

– **Billy Hulkower ...**

Pizza - Canada

“Sales challenges for in-store pizza highlight a need to develop and execute more targeted strategies that address specific population segments the category underperforms against and grow its frequency among those more likely to eat pizza. As the sales pie has shrunk, the battle for share of stomach versus other in-store ...

Processed Meat - Brazil

“Although consumption is increasing, Brazilians still eat much more raw meat than its processed counterpart. Brazilians are consuming more, and price plays a crucial role when purchasing processed meat. Offering new flavors in familiar formats, such as burgers and sausages, could tempt consumers to buy even more.”

– **Andre ...**

River Cruising - Europe

“The new additions to riverboat fleets (with more ships on the drawing board) have widened the customer base for river-cruise holidays, which, if current trends continue, will increase exponentially, throughout the coming decade.”

– **Jessica Kelly, Senior Tourism Analyst**

Salty Snacks - Brazil

“The salty snacks category has great potential to continue growing in the country, both from consumers’ and the industry’s point of view. This is because consumers are increasingly pressed for time, prioritizing quick foods, such as salty snacks, and the industry, influenced by sporting events taking place in Brazil, is ...

Shopping for Major Appliances - US

“The major appliance market has rebounded in recent years, driven by improvement in the overall economy and in the real estate and home renovation markets. Low prices remain an essential part of the major appliance shopping process, but a variety of other factors come into play as well and provide ...

Smoking Cessation and e-cigarettes - US

“The smoking cessation products and e-cigarettes market is in a period of flux, as e-cigarettes continue to gain mainstream acceptance and the NRT category adapts to a new pool of potential customers. Brands that can adapt to meet the needs of more consumers in more ways will be able ...

Snack, Nutrition and Protein Bars - US

“Consumers want healthy options. When asked to create their ideal bar, 65% of respondents built a bar they categorized as healthy (compared to 28% who built an indulgent bar).”

– **Beth Bloom, Food and Drink Analyst**

Snacks Salgados - Brazil

“A categoria de snacks salgados tem muito potencial para continuar crescendo no país, tanto pelo lado do consumidor, quanto pelo da indústria. Isso porque o consumidor, cada vez mais pressionado pelo tempo, tende a dar mais importância a refeições rápidas, como os snacks salgados, e a indústria, influenciada pelos eventos ...

Specialist Food and Drink Retailers - UK

Sweden Outbound - Sweden

“Attributes such as quality standard marking, food traceability and low food miles/freshly produced on-site can all be compelling reasons for shoppers to favour specialists and eschew the mainstream retailers.”

– **Chris Wisson, Senior Drinks Analyst**

Telecommunications - UK

“Telecommunications usage is changing significantly thanks partly to technological developments, but strict regulation and intense competition are driving market revenues down. Major structural changes in the industry are now materialising as the UK looks to move in the same direction as much of Europe and the US. Quad play, combining ...

The Private Label Beauty Consumer - UK

“The media attention given to beauty products launched by discount retailers, along with a high level of NPD in the sector, has seen own-label colour cosmetics soar in popularity, taking a 53% share of the private label beauty market in 2014. However, at a total level, the private label beauty ...

婴幼儿尿片和湿巾 - China

“从全球新产品开发的趋势和消费者对不同国家的婴儿纸尿裤和湿巾的偏好习惯为商家对妈妈们对婴儿纸尿裤和湿巾产品的特定元素和成分的偏好提供了重要的提示多样化的婴儿湿巾产品适用于多种新的清洁场合，将在不远的将来吸引更多新的消费群。另外，质量保证和专业服务将帮助母婴用品专卖店成功赢得购买婴儿护理产品的妈妈们的芳心。”

– **刘欣琪, 研究分析师**

有机食品偏好 - China

“有机食品价格过高是主要的阻碍因素，商家还未充分证实产品高价物有所值。与此同时，有机食品品牌也有必要跳出仅仅最为“安全选择”的角色，致力于更多强调“道德”或“功能性”的优势，使其产品更具吸引力。放眼长远，为了帮助消费者形成“有机”的生活方式，投资推广教育性的营销活动也必不可少。”

– **顾菁,高级研究分析师**

“Swedish outbound travellers are adventurous and well-travelled individuals making some 15.9 million trips in 2013. Swedes typically seek out destinations offering warm and sunny climates and value for money, but cultural experiences are also important to this sophisticated traveller.”

– **Jessica Kelly, Senior Tourism Analyst**

The Financial Lives of College Students - US

The changing demographics of America are reflected in the changing demographics of college students. Financial institutions trying to reach college students will have to adapt to the different financial needs, knowledge and backgrounds of various segments if they expect to gain their fair share of the market.

UK Retail Briefing - UK

Each month Mintel's UK Retail Briefing concentrates on a particular sector or market. This month's focus is on E-commerce.

家居清洁 - China

“除了高效家居清洁产品，品牌还可以提供专业清洁服务，从而在拥挤的市场中脱颖而出，并且培养消费者的家居清洁习惯和品牌忠诚度。”

– **姜雨微, 研究分析师**

消费热点研究 - China

“2014年中国经济增长7.4%，为1990年以来增速最慢的一年。根据政府报告所示，2016-2020年十三五期间的经济增长目标已经被调整到7%左右。这表明经济增速放缓将成为中国未来经济发展的常态。”

瓶装水 - China

“尽管瓶装水被认为适合在外饮用，在家饮用场合有望成为当下几近饱和的市场未来发展的驱动力，这一点在高端瓶装水市场尤为突出。

车型喜好 - China

“2014年，新车销售继续保持增长，交易量达1,970万辆，同比增长9.9%。尽管高线城市纷纷出台汽车限购政策，但随着更多低线城市消费者有经济能力买车，乘用车销量预计将进一步增长。

美容零售 - China

“随着O2O模式兴起,中国美容产品零售市场的供应端和需求端都在快速发展。

供应端方面,科技巨头深入零售市场,大型美容连锁店在低线城市扩张。需求端方面,消费者出现了社交购物行为,对促销活动,对新科技充满兴趣。为了更全面的覆盖市场,线上和线下渠道的整合已成必然。同时,美容品牌需要整合社交网络、品牌建设和购物从而提供一体化的体验。”

— 陈文文,高级研究分析师

饼干 - China

“虽然很多男性嘴上不说‘我喜欢吃甜食’，但从他们在饼干的消费行为上看，男性甚至比女性更偏爱甜味饼干，表明饼干品牌有机会通过更有针对性的营销传播、包装和产品创新来吸引男性消费者。”

— 邱昊,研究分析师