

December 2018

## Poultry - US

"Poultry maintained its position as the most widely consumed animal protein with nearly total household penetration. Category sales topped \$26.2 billion in 2018, a modest 2% gain from 2017. The universal appeal of poultry comes from its healthy reputation, versatility, and affordability. With consumer interest in protein at a ...

## Cooking Sauces and Pasta Sauces - UK

"The popularity of making sauces from scratch and the growth of own-label continue to chip away at value sales in the market. Addressing consumers' concerns around sugar, salt and artificial ingredients will be key to turning the tide. Exploring the sauce kit format could help boost associations with healthiness and ...

## Fruit Juice, Juice Drinks and Smoothies - UK

"That consumers are limiting consumption due to concerns about sugar emphasises the importance of reformulation in juice drinks, and fruit juices and smoothies using their health halo and differentiation to support sales. The latter includes giving more details on ingredients, offering more varieties of blends and targeting different usage occasions ...

## RTD Alcoholic Beverages - US

"RTD (ready-to-drink) alcoholic beverages continue to be an "also drink" alcohol type, trailing behind beer, wine, and spirits in consumption and volume sales. However the category, which includes FMBs (flavored malt beverages), prepared spirits-based cocktails, and wine coolers has seen recent strong innovation, moving it further away from the cloying ...

## White Spirits and RTDs - UK

"The importance that many white spirits buyers place on product details underlines the need for companies to highlight attributes such as ingredient varieties and provenance prominently on pack. Securing good distribution and visibility in the on-trade is also crucial for brands in order to drive retail purchase."

## Foodservice in Retail - US

"Retailers are building out their prepared food programs to be more sophisticated and take direct aim at restaurants, as well as other retailers. They are differentiating with more on-site restaurants, which can range from a well-known quick-service chain to a fast casual restaurant helmed by a celebrity chef. And while ...

## Sugar and Alternative Sweeteners - US

"Sales of sugar and alternative sweeteners continue to fall, as consumers continue to limit their usage and are turning to other, less-sweet options, if not foods/drinks that are sufficiently flavored as-is. Sales in the honey segment are one category bright spot. Honey brands are benefiting as well as leveraging ...

## White Spirits - US

"The white spirits market is growing, albeit at a slower rate than dark spirits. Consumer interest in white spirits is growing as evident by the strong growth of tequila and higher-end/super premium gin brands. However, the trendiness of tequila and gin have not yet crossed into mass market appeal ...

## Seniors and Health - US

"The number of Seniors, adults aged 65+, is on the rise. By 2023, the US population of Seniors will be 61.6 million strong, accounting for 23.2% of the total US population – up from 20.6% in 2018. Today's Seniors express a positive, realistic attitude toward health. Focusing ...

## The Leisure Outlook - Quarterly Update - UK

"The leisure industry continues to benefit from consumer drive towards experiences. As winter temperatures settle in, consumers are turning to indoor activities, especially visiting museums and art galleries. While pubs and nightclubs remain key to the night

## Food and Drink - International

– Alice ...

economy, operators need to find ways of holding up demand as consumers are ...

### Beer - UK

“Consumers’ desires to lead healthier lifestyles is evident, this feeding through to the trend towards people reducing/limiting alcohol intake. Given the strong consumer perception that low-/no-alcohol beers allow you to drink more beer, there is scope for such variants to forge a role as the permissible face of ...

### Dining Out in 2019 - US

"The restaurant industry is expected to maintain strong growth in 2019 thanks to positive economic conditions and increased incremental sales across segments fueled by a demand for off-premise dining. Dining out is a favorite activity for Americans and personal as diners have an increasing desire to form a connection with ...

### Free-from Foods - UK

“Concerns around the environment and animal ethics are giving dairy-free food and drink a boost, with the multidimensional appeal of these products boding well for the longevity of the dairy-free segment. Meanwhile, more clarity is needed to help shoppers easily identify which allergens products are free from. This should help ...

### Food and Drink Shopper - US

"Big stock-up trips at traditional supermarkets are still happening, but especially among younger food and drink shoppers they're giving way to smaller quick-fill trips across a wider array of retail outlets. This new generation of shoppers is also less likely to make a list and more likely to make purchase ...

### Coffee Shops - UK

“With four in five coffee drinkers wanting to customise their drink, shops that offer create-your-own options will thrive in today's challenging high street conditions. But it's not just customisation that's important. Whether it's becoming destinations for work, socialising and convenience, focusing on sustainable schemes or meeting health goals, coffee shops ...

## November 2018

### Supermarkets - UK

“The supermarket sector is growing once more, but this growth has not been enough to stem the tide of spending moving away from large-format stores. This decade has seen unprecedented change in both how grocery shoppers behave and how the sector is structured. Consolidation, on both the retail and supply ...

### Weight Management - US

"More than 206 million adults in the US are currently managing their weight. While the audience is sizeable, the challenge for industry players is that the majority are following a self-guided approach to weight management. This could point to why the obesity rates continue to rise. Trends toward body acceptance ...

### Fish and Shellfish - US

"The \$18 billion fish and shellfish category enjoys widespread consumer participation but still lags behind other more “every day” proteins. Sales increased 13% in the past five years, driven by growing commodity prices

### Wine - US

"Total US dollar sales of wine should reach \$62 billion in 2018, for overall growth of 15% since 2013. The growth rate has slowed since a 4.2% bump in 2015, settling to a more moderate 1-2% annual growth

## Food and Drink - International

and consumer interest in healthy, high-protein foods. A healthy reputation is one clear advantage that fish and ...

projected through 2023. Wine growth has outpaced total alcohol, while wine ...

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

"Financial well-being and confidence was lower in each of the three months to October than we reported throughout the summer months. This matches the stagnant economic performance in August and September. Overall though, most consumers are still getting by, and remain relatively optimistic about their financial future."

– Rich ...

### Kids' Snacking - UK

"That efforts to limit the amount of snacks children eat are near universal and parents are switched onto the importance of snacks being healthy is welcome news for PHE and indicates that the industry's efforts to improve the healthiness of their products will appeal. Healthier versions of popular children's snacks ...

### Dark Spirits - US

"The dark spirits market continues to thrive due primarily to the strong growth of American whiskey. Consumer interest in craft products as well as changes in drinking habits and preferences have benefited many dark spirit brands, especially super- premium brands. Dark spirit drinkers tend to be enthusiastic about dark spirits ...

### Foodservice Online Ordering and Delivery - US

"Restaurant delivery and carry out continue to be a bright spot for the foodservice industry with use being driven by consumers across generations looking for convenience and younger consumers looking to relax at home. The majority of consumers still prefer to order directly from restaurants, but interest in third party ...

### Dining Out Dayparts - US

"Restaurants are facing increased daypart competition from retailers as well as a decline in traffic overall, but particularly for the three traditional dayparts. To combat growing threats, foodservice operators will need to leverage more on-demand dining and nontraditional dayparts, and target young people, who are the biggest consumers of both ...

### Ice Cream - UK

"The scorching 2018 summer has been a boon to the ice cream market, fuelling sales growth at a time when cost pressures are putting a squeeze on operators. Lower-calorie ice cream brands have caused a stir in 2018, building up a not insignificant market penetration. While the lower-calorie proposition has ...

### Pizza and Italian Restaurants - UK

"Consumers' desire to cook pizza or Italian food at home as well as the rise of "more adventurous cuisines" is forcing operators to innovate with menu choices and retail formats in order to maintain demand. While the spate of emerging pizza or Italian fads looks to have potential to retain ...

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

"Health and environmental concerns have prompted many people to cut back on processed meat. However, premium products can tap into the widespread 'less but better' mindset to support value growth. Meanwhile eco-friendly packaging and carbon offset guarantees are promising means for companies to demonstrate their environmental commitments."

– Alice ...

October 2018

## Food and Drink - International

### Still, Sparkling and Fortified Wine - UK

"In a market where many shoppers are focused on buying what is on special offer and consumers typically drink from a narrow repertoire of wine types, wine festivals can help to prompt people to buy more wine and encourage greater experimentation. These should include samplings and suggestions on wines people ...

### Grocery Multiples: Reconfiguring the Non-food Offer - UK

"Over the past five years pressure has been placed on the supermarket sector in the UK, with the rise of discounters, online and convenience stores taking away a traditional dependence on the larger store format. As such the traditional big four have had to readjust the formats of their larger ...

### Attitudes to Low/No/Reduced Sugar Soft Drinks - UK

"The public spotlight on soft drinks has ensured that most users claim to try to make healthy choices at least most of the time. However, this typically stops at checking the added-sugar credentials of drinks, very few people scrutinising their ingredients or nutrition details. This puts the onus on healthier ...

### Pizza - US

"While sales growth has been minimal for retail pizza, a strong uptick in 2018 provides an indication of the growth potential of the category. Continued improvements in flavor variety, quality, and healthfulness will help marketers and retailers take advantage of frozen and refrigerated pizza's unique combination of convenience and fun ...

### Gluten-free Foods - US

"Despite a decline in the number of gluten-free consumers, there is a generally positive opinion of gluten-free foods. Consumers consider the claim to indicate the product is healthy and beneficial to all, not solely those who have celiac disease or a gluten intolerance. The challenge for the category is in ...

### Beer and Craft Beer - US

"Dollar sales of beer, craft beer, and cider are estimated to reach \$112 billion in 2018, up 1.1% over 2017 totals. Dollar sales of beer will level, with very small year-over-year gains projected through 2023. Volume sales are declining at a higher rate (with an estimated dip of just ...

### Unprocessed Poultry and Red Meat - UK

"Openness to recipe suggestions probably offers the simplest way to encourage consumers to experiment with different types of meat to widen their repertoire. This would also tap into their love of cooking and willingness to try something new. Recipe suggestions could also help to drive awareness of cheaper cuts, breaking ...

### Cheese - UK

"Strong interest in purchasing cheese from local producers in supermarkets creates scope for the grocers to tap into the allure of specialist cheese shops, while leveraging the overarching interest in buying British produce. Meanwhile, the trend towards reducing meat consumption presents an opportunity for the market to encourage more frequent ...

### Flavor Innovation on the Menu - US

"American diners now have access to an expansive range of flavors, dishes, and cuisines, reflective of the diverse and highly competitive foodservice market. However, while the most adventurous embrace innovative, trendy, and international flavors, the majority still tend to stick with familiar fare, at least most of the time. Opportunity ...

### Yogurt and Yogurt Drinks - US

"Total sales of yogurt are flat; consumers are trying new yogurt styles and brands but not increasing their total yogurt consumption. While sales of drinkable yogurt are quickly growing they have not offset the decline of spoonable yogurt. Moreover, drinkable yogurts are likely cannibalizing sales of spoonable. High protein/low ...

## Food and Drink - International

### Consumers and the Economic Outlook - US

"The economy continues its slow and steady recovery, though economists are hesitant to say that it has officially recovered. While some consumers may be watching economic indicators, many are not, and even those who are may not see the direct effects on their daily lives. Overall, if consumers were already ...

### Restaurant Decision Making Process - US

"Restaurant industry sales are expected to grow in coming years as positive economic conditions spur increased consumer spending on AFH (away from home) dining. However, with consumers having more choices of where to dine, restaurants must emphasize convenience to capture dining dollars. In addition, operators must offer more than quality ...

### Cooking Enthusiasts - US

"The share of the population identified as Cooking Enthusiasts has remained stable over the last three years, providing a solid base of consumers who cook at home regularly and enjoy it. However, enthusiasm among other segments is on the decline, as less of the population is defined as Conflicted Cooks ...

## 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

### Hot and Cold Cereal - US

"The \$10.4 billion cereal category continues to be plagued with struggles, largely an impact of falling cold cereal segment sales. Yet, the category still enjoys nearly universal participation, suggesting that any attrition is in consumption frequency or volume, not overall category participation. Frequency can be strengthened though, by accentuating ...

### Marketing to Moms - US

"The competition among brands to get moms' attention is fierce. Only a small share of moms say they have the money to pay for everything their kids want to do, meaning brands have to put in a lot of effort to make it to the top of moms' list. One ...

### 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

## Food and Drink - International

exciting flavours will be key to promoting brand loyalty. That brands are still seen to have the ...

### 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 ...

### 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

### 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 ...

### 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

## Food and Drink - International

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 ...

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 heatwave has helped boost the UK leisure economy."

— ...

### 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 ...

## August 2018

### Breakfast Cereals - UK

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

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

"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 ...

### 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 ...

### 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 ...

## Food and Drink - International

### 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 ...

### 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

"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 ...

### Breakfast Foods - US

"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

## Food and Drink - International

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 ...

### 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 ...

### 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 ...

**June 2018**

### Prepared Meals - Frozen and Refrigerated - US

"The prepared meals category has returned to growth as category competitors have responded to consumer interest in less-processed offerings and greater cuisine variety. Brands and retailers can help maintain the momentum by catering to the diverse needs of a new generation of users with products that offer greater flexibility, new ...

### Food Packaging Trends - US

### 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 ...

### 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 ...

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

“The increase in confidence that we discussed in Consumers and the Economic Outlook – UK – March 2018 clearly wasn’t a one-off. Our confidence data has been running for almost a decade now, and people’s assessments, both of their current financial situation and how they expect their finances to shape ...

### Beverage Packaging Trends - US

## Food and Drink - International

32% of food launches tracked by Mintel GNPD (Global New Products Database) from May 2018-April 2018 featured new packaging, and new packaging experienced the highest gain among launch types from 2013-18. 62% of shoppers claim on-pack information is important to food choice, suggesting that consumers are reading labels. 58% of ...

### Carbonated Soft Drinks - UK

“Driven by a growing focus on healthiness, consumers are increasingly looking to limit their sugar intake, the Soft Drinks Industry Levy exacerbating this issue. This focus has led to many people switching to diet or no-sugar variants of CSDs, pushed by heavyweight players such as Coca-Cola and PepsiCo through their Coca-Cola ...

### The Leisure Outlook - Quarterly Update - UK

“Consumers cut back on spending and put more focus on their health at the start of the year. As we approach summer peoples’ priorities appear to be shifting. A quality over quantity mind-set is still apparent but intention to spend on drinking and dining out is on the rise. Leisure ...

### Attitudes towards Lunch Out-of-home - UK

“The convenience of quick meals is a key driver for the lunch-to-go market amongst time-poor consumers. Operators should also consider the grey pound as a good long-term growth driver for leisurely eating out occasions, led by Baby Boomers who are more inclined to sit down for a lunchtime meal.” ...

### What Children Drink - UK

“A wide range of drinks are bought by parents for children. With parents looking for healthier drinks when shopping for their kids and with school policies promoting them, healthier drinks remain a key area for brands to focus on. Single-serve drinks could come under pressure in the coming years, though ...

### Soup - US

“Innovation in format, functionality, design and customization have made beverage packaging a key feature of new product launches in the category. Packaging innovation can be an especially effective way to engage with key consumers groups such as those aged 18-34 and parents. Challenges lie in creating distinctive packaging in this ...

### Attitudes towards Sports Nutrition - UK

“While the growing choice of high-protein food and drink is creating intensified competition, convenient formats and increasing availability in the mainstream are helping to make sports nutrition more accessible. Interest in products supporting gut health and those featuring health-boosting herbs and spices highlights these as areas ripe for innovation.”

### Fruit - US

“With current sales of just over \$50 billion, fruit is a widely popular and growing category, even if that growth is a relatively slow 2-3% annually. Within the category’s largest segment – fresh – there is a relative lack of brand power, as private label options dominate in terms of ...

### Marketing to Millennials - US

Millennials are the largest generational group in the US and as they age they are only becoming a more important part of the consumer economy. Millennials are growing their incomes and entering new markets as they buy homes and start families. Marketers interested in reaching this group will need to ...

### Juice and Juice Drinks - US

“Total sales of juice are in decline due to falling sales of 100% juice and bottled smoothies paired with flat juice drink sales. Changing perceptions around the healthfulness of juice and competition from other drinks is causing consumers to choose other drinks over juice. New juice products that better target ...

### Social Media in Foodservice - US

## Food and Drink - International

"The soup category struggled to increase sales significantly. There were some bright spots. Growing segments – including refrigerated fresh soup/frozen soup, wet broth/stock, and dry soup – made up some ground. But these gains weren't enough to compensate for stagnant RTS (ready-to-serve) wet soup sales and declines in ...

"More than half of consumers have seen restaurant content on social media in the past year, reflecting the impact social media has in the foodservice space. Social media experiences in restaurants generally drive a positive association among consumers and create memorable moments, but social media isn't a one-size-fits-all strategy. Every ...

**May 2018**

### Consumer Snacking - UK

"Snacking remains an ingrained habit for Britons. The view of snacks as an important energy source throughout the day, and as a necessity in busy lifestyles, underpins this habit. It also points to further longevity for snacking and the relevance for snacks to align with catering to or countering busy ...

### Pub Visiting - UK

"Millennials are particularly likely to view pubs as all-round leisure experiences and are receptive to new and more unusual forms of entertainment. The difficulty for landlords will be to cater for these more open-minded pub-goers while also meeting the needs of more traditional patrons who tend to see the pub ...

### Energy Drinks - US

Sales grew an estimated 5.6% in 2017, bringing the energy drink/shot market to \$13.4 billion. Positive growth of 4-5% per year is forecast through 2022, when the market is expected to reach about \$16.9 billion. The dominant energy drink segment, with 91% market share, has been ...

### Vegetables - US

"The vegetable category remains sizable, though sales are largely driven by consumer interest in lower prices and fresher options. While consumers indicate they would like more vegetables in their diet, data shows they continue to fall short of recommendations, suggesting brands may well have to incorporate novel approaches to garner ...

### Marketing Health to Millennials - US

The Millennial generation is aged 24-41 in 2018, with many in the midst of major life milestones. As this generation balances a busy lifestyle they focus on the small steps they can take to manage their wellbeing. For Millennials, health and wellness is essentially a means to looking better and ...

### Chocolate Confectionery - UK

"Premiumisation remains a strong trend in the chocolate market. As references to provenance have become prevalent in premium chocolate, going a step further and educating consumers on how the taste of the chocolate is influenced by the origin of the cocoa beans, could help brands connect with consumers on a ...

### Dips and Savory Spreads - US

"The diverse \$4.6 billion dips and savory spreads category enjoys solid consumer participation, likely due in part to the increasing popularity of snacking and brand loyalty. All three segments of the category managed growth from 2016-2017, but refrigerated options have been especially successful as consumers seek out fresh foods ...

### Non-chocolate Confectionery - US

"Dollar sales of non-chocolate confectionery have increased although year-over-year growth has been slow, as the category struggles with consumer concerns over health. However, the importance of indulgence has prevented decline overall. Growth, albeit slow, is forecast through 2022, with the slowdown due to reduced category participation."

**-Beth Bloom, Associate Director ...**

## Food and Drink - International

### Quick Service Restaurants - US

"The QSR market is thriving thanks to QSR brands making changes consumers want while still staying true to its brand identity. Value remains a major focus within the QSR market, and most chains are focusing heavily on their low-price options, with many also developing a few premium options in order ...

### Marketing to the iGeneration - US

Aged 11-23 in 2018, the iGeneration is the generational group that follows Millennials. Also referred to as Gen Z, to Millennials' Gen Y, the iGeneration is starting to take Millennials' place in the desirable 18-34 demographic, and marketers are investing in building relationships with this group. In some senses, iGens ...

**April 2018**

### Drinks Packaging Trends - UK

"The spotlight on plastic packaging and the environment is already driving change in the drinks market, while health concerns present a challenge and an opportunity. Consumer openness to using a deposit return scheme bodes well for its implementation, meanwhile, portion control packaging and nutrition labelling can appeal, helping consumers to ...

### The Savvy Food Shopper - UK

"A savvy shopping mentality is firmly ingrained among UK consumers when it comes to their grocery purchases. That this is underpinned by emotions as well as by monetary gains, signals continuing longevity.

However, there are plentiful opportunities for brands and retailers to connect with the savvy shopper beyond promotions. Positioning ...

### Added Value in Dairy Drinks, Milk and Cream - UK

"Animal welfare attracts strong consumer interest. Recent negative publicity around the dairy industry adds further urgency for high-welfare dairy systems to tangibly demonstrate their credentials to consumers. High-welfare products will also need a prominent

### Pub Catering - UK

"Eating at pubs is an affordable treat which should not be badly impacted in a consumer downturn, providing pub operators continue delivering excellent service as well as high quality yet affordable meals. In addition, pubs that make the most of non-traditional meal times can maximise profits coming from younger consumers ...

### Frozen Snacks - US

Frozen snacks have bounced back from an unstable past few years and steady, but minimal, growth is predicted looking ahead to 2022. Private label brands are performing strongly and legacy frozen snack brands remain stable, especially among parents with 85% acknowledging their kids eat frozen snacks. Despite the stability, increased ...

### Sweet Biscuits and Snack Bars - UK

"Both more indulgent features, such as a thick covering of chocolate and indulgent fillings, and naturally healthy ingredients, are of strong interest to eaters of sweet biscuits. Tailoring NPD to both these demands is needed to maximise the number of usage occasions for biscuits. Limiting the amount of sweet biscuits ...

### Convenience Stores - UK

"Growth in the convenience sector accelerated for the third consecutive year, in part driven by inflation. However, it was the structural changes, both through acquisitions and failures, which made it a defining year for the sector. The increased power of the multiples in the market is likely to be both ...

### Consumers and the Economic Outlook - US

"The US economy weathered the political tumult of 2017 with surprising vigor, as most major economic indicators fared increasingly better throughout the year. The nation's GDP (gross domestic product) has been on the rise for 17 consecutive quarters, and consumer

## Food and Drink - International

positioning in-store to disrupt most people's habitual approach to buying milk."

– Alice Baker, Research ...

### Chocolate Confectionery - US

Dollar sales of chocolate confectionery continue to grow at a modest pace, driven by the nearly universal penetration and the belief that chocolate is a permissible indulgence. While purchasers are creatures of habit when choosing chocolate, they are also open to new flavors and varieties and willing to pay more ...

### Snack, Nutrition and Performance Bars - US

Dollar sales of snack, nutrition, and performance bars saw steady year-over-year growth from 2012-17 (+20% overall). 2017 represents a slight slowdown, with an estimated 2.6% increase over 2016 (0.1% when adjusted for inflation). While consumer interest in snacking, protein, and functional foods positively impacts the category, a growing ...

### On-premise Alcohol Trends - US

Sales of alcohol on-premise are rising year-over-year thanks to consumers' interest in premium alcoholic beverages. While the market is growing, competition among bars/restaurants has never been stronger. Foodservice establishments must contend with consumers' preference for drinking at home and must prepare for the next generation of on-premise consumers. Establishments ...

### Ice Cream and Frozen Novelties - US

"While consumers strive to live healthier lifestyles, strong engagement in the category suggests that there is still room for indulgence. Yet, the ice cream and frozen novelties category attained modest dollar sales growth from 2016-17 while unit volume slowed, indicating that increased consumption frequency is critical to growing the category ...

confidence has been marching forward at record levels, while unemployment ...

### Carbonated Soft Drinks - US

The mature \$36.2 billion CSD (carbonated soft drink) market faces competition from RTD (ready to drink) coffees, energy drinks, sparkling waters, and BFY (better-for-you) options. Growth opportunities lie in targeting the occasions when CSDs offer unique benefits and focusing on functional and aspirational qualities that set these apart from ...

### Grains and Rice - US

"The market for rice is considerable, standing at \$2.5 billion, but has stagnated in recent years. Consumer interest in a wide range of cuisines featuring rice as a component should lead to growth in coming years, but the category may also benefit from leveraging healthier attributes, potentially from rice ...

### Burger Trends - US

Burgers are menu and consumer favorites and competition emerges from all angles; both burger-specific operators and restaurants that menu them are using more than price promotions to capture more burger business. Consumers indicate a willingness to pay more for burgers made with premium ingredients as operators increasingly innovate with crowd-pleasing ...

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## Food and Drink - International

### Bottled Water - UK

“While the spotlight on plastic waste is a threat to the whole soft drinks market, the option of tap water and roll-out of water refill stations make this a more severe challenge for bottled water. Widespread feelings of guilt among consumers over the plastic waste generated by drinking bottled water ...

### Online Grocery Retailing - UK

“The smallest and quickest-growing aspect of the grocery market, online grocery is a sector that has seen a vast number of innovations in the past year as it strives to evolve to cater not just for big-basket supermarket-style shops but also for smaller top-up-based shops.”

### Brand Overview: Food - UK

“Expectations of brands and the categories they are in key to consumer perceptions. Breakfast cereals are a clear example of this. Health standards set by certain brands impact upon the way in which other brands that do not match up are viewed. Conversely, brands in treat categories largely avoid being ...

### Attitudes towards Home Delivery and Takeaway - UK

“Consumers’ need for quick convenient meals is confirmed, as four in five Brits have bought takeaway food recently. Young working adults and parents are driving demand for weekly home deliveries, prompted by the rise of online ordering and third-party services.”

– Trish Caddy, Foodservice Analyst

### Alcoholic Beverage Drinking Occasions - US

“Dollar sales of alcohol (on- and off-premise) reached \$234 billion in 2017, a 3.5% gain over 2016. Overall sales increased by 20% from 2012-17 due to a supportive economic climate, product innovation – including flavor and format advancements – and a focus on premiumization, all which have encouraged trial ...

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

“People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

### Health Food Retailing - UK

“The health food specialists have capitalised on the health and wellbeing trend but it hasn’t been easy as supermarkets and online players have increasingly muscled in on the market. The most important factor for specialists is trust, both as a way to combat the threat of the competition but also ...

### Baby Food and Drink - UK

“With the income squeeze likely to further boost the popularity of homemade food, it is imperative for manufacturers to convince consumers that their products are worth paying more for. Highlighting ingredient provenance would help to project an image of quality and transparency, much needed given parents’ low trust in brands ...

### The Leisure Outlook - Quarterly Update - UK

“Although participation in many leisure activities continues to grow there are areas of the market that may begin to struggle if consumers begin to increase their saving habits. There is a growing range of eating out venues so pubs and restaurants need to stay innovative.”

– Helen Fricker, Associate ...

### Cakes, Cake Bars and Sweet Baked Goods - UK

“While this is a mature market in terms of overall usage, most people do not treat themselves to cakes and sweet baked goods that often, with scope for increasing frequency of usage. A mixture of activity is needed to appeal, as a broad spread of attributes are important to people ...

## Food and Drink - International

### Convenience Store Foodservice - US

Total c-store (convenience store) foodservice sales reached an estimated \$38 billion in 2017; while foodservice sales will grow, Mintel forecasts growth will occur at a slower rate relative to previous years. C-stores tend to have a loyal consumer base that drives most foodservice purchases. Though these consumers are important, operators ...

### Salty Snacks - US

The nearly \$12 billion salty snacks market continues turn in a strong performance driven by the increasing prevalence of snacking. Meat snacks, popcorn, and cheese snacks are the category's three largest segments and are responsible for much of the growth. New flavors and varieties are key to continued growth, as ...

### Nutrition and Performance Drinks - US

"Sales of nutrition and performance drinks held steady in 2017. Consumer interest in health and in products that provide functional benefits spelled gains in recent years. A relatively positive economic climate has allowed consumers to spend more on drinks that promise added value. A slowdown is seen in 2017 due ...

### Healthy Dining Trends - US

"Consumers are no longer satisfied by the basics when it comes to ordering a healthy dish at a restaurant; unique, flavor-driven dishes are becoming the norm. Highlighting ingredient quality gives even indulgent dishes, like pizza and burgers, a halo of health. Younger consumers are being impacted by this trend and ...

### Convenience Stores - US

"Faced with declines in motor fuel rates, cigarette smokers, and carbonated soda drinkers in recent years, the convenience store (c-store) industry is in a state of change as it looks toward other product areas and innovations to drive sales. Leading retailers in the industry are focused first and foremost on ...

### Food Packaging Trends - UK

"The spotlight on plastic packaging and its environmental impact will be a key driver of change in the food industry. Consumers' expectations for sustainable packaging are set to heighten demand for alternative materials. Responding to the shifting demographic backdrop is also vital, given the growing number of small households and ...

### Baby Food and Drink - US

"After two years of stagnating sales, the \$6.8 billion market for baby/toddler food and drink shows indications of growth ahead. Largely stemming from formula sales, the category is expected to leverage a number of healthy attributes and claims in premium-positioned products. Parents are seeking healthy attributes above all ...

### Butter, Margarine and Oils - US

An ingredient or flavor booster in a wide variety of recipes and dishes, butter, margarine, and oils are used by nearly all consumers. While widespread penetration does challenge substantial growth, the overall category did manage a small gain, 1% from 2016-17, stemming from the gains of butter while margarine struggles ...

## February 2018

### Pasta, Rice and Noodles - UK

"Convenience and value for money remain key strengths for the category and should support the market if inflation remains high and consumer incomes are squeezed. Meanwhile, encouraging new dish and cuisine pairings for pasta, rice and noodles remains key to establish new usage occasions and drive volume growth."

### Attitudes towards Healthy Eating - UK

"The income squeeze coupled with the perceived expense of healthy food has the potential to curb the overarching healthy eating trend. However, it also opens ripe opportunities for retailers to provide more support for shoppers in making choices which are both healthy and price savvy – doing so should promote ...

## Food and Drink - International

– ...

### Potato and Tortilla Chips - US

Potato and tortilla chips have generated solid growth in recent years, driven by the increasing prevalence of snacking, a steady stream of new flavors, and the category's status as a permissible indulgence. Bold and creative new flavors and forms will continue to drive sales in coming years, along with a ...

### Alcoholic Drinks Review - UK

"Many consumers are moderating their alcohol intake, putting pressure on the industry. However, consumer interest in low- and non-alcoholic drinks and widespread quality over quantity mindset suggest opportunities for brands to stay on the menu."

– **Kiti Soininen, Category Director, Food & Drink**

### Children and Health - US

"Illness is prevalent among children, as 97% of children younger than 12 experienced some type of illness symptom in the past year. Their weaker immune system combined with opportunities for interaction and germ spreading makes them especially susceptible to illness. The OTC (over-the-counter) children's health products market has continued to ...

### Bottled Water - US

The bottled water category continues steady growth contributed by all segments. As consumer concern over sugar and hydration grows, still and sparkling waters alike reap the benefits. Brands at both ends of the price spectrum are finding success: private label often winning via price, and premium bottled water appealing via ...

### Baking and Dessert Mixes - US

The market for baking and dessert mixes is a large one, valued at nearly \$4 billion. However, it continues to shrink, following a pattern that has endured for much of the past decade. That lack of growth is not necessarily

### World Cuisines - UK

"Improved ranges, particularly in own-label and in emerging cuisines, are providing a boost to sales. With interest in emerging world cuisines still significantly higher than current at-home eating though, a big opportunity exists for further sales growth through building familiarity with less widely eaten dishes. This includes using promotions and ...

### Menu Trends - UK

"Although older diners enjoy common cooking methods like roasting, steaming and stir frying, affluent 16-44-year-olds are driving the shift towards emerging food trends including smoking, curing, raw food, fermenting and pickling. Pizza brands are leveraging consumer demand for wood-fired oven cooking; however air pollution concerns may result in the banning ...

### Fast Casual Restaurants - US

Even as things change, they still remain the same. The concept of quality food at an affordable price that launched the fast casual segment has remained a key association. However, as dining habits shift and the landscape gets more competitive, fast casuals look beyond what worked in the past and ...

### Full Service Restaurants - US

"FSRs (full service restaurants) continue to experience sales growth and set the trends that influence the entire restaurant industry as well as retail food. However, while the market as a whole is growing, many individual FSRs, especially mainstream casual dining chains, are facing sales losses. Market saturation and changes in ...

### Crackers - US

"After a four year period of modest growth, sales of crackers fell slightly from 2016-17, thanks in part to intensified snacking competition. Benefitting from consumer interest in snacking and a reputation for being versatile, the crackers category enjoys nearly universal

the result of consumer dissatisfaction, but it is resulting more ...

penetration, making growth difficult to come by. As a category ...

**January 2018**

### Condiments and Dressings - UK

"Wider trends in the food market, such as consumers' appetite for emerging cuisines, have impacted usage of condiments/dressings. While this has hit sales of dish-specific sauces, NPD in mayonnaise inspired by hot and spicy flavours has re-energised the segment. Sizeable interest in fermented condiments and a wider availability of ...

### Consumers and the Economic Outlook - US

"Economic improvement continued at a relatively steady clip as a new presidential administration took office at the beginning of the year. While there have been natural catastrophes and tragedies throughout the US, the economy has generally remained stable and any expert predictions continue to be optimistic."

- Jennifer White Boehm, Associate ...

### Private Label Food and Drink Trends - US

"Sales of private label food and beverages have risen only modestly in recent years, roughly keeping pace with sales of food and beverages overall. The pace of growth, however, could pick up in coming years as retailers look to their store brands to strengthen their value propositions amid intensifying competition ...

### Crisps, Savoury Snacks and Nuts - UK

"While enjoyment and indulgence play a key role in the market, health considerations are also affecting it, driving the growth in popcorn, nuts and meat snacks. That half of savoury snack eaters deem snacks made with pulses healthier than potato-based ones suggests scope for further NPD here."

- Anita ...

### Sugar and Gum Confectionery - UK

"With volumes sales of sweets expected to continue to fall, the onus is on companies to encourage trading up within the category. The premium end of the market, however, remains underdeveloped – despite strong consumer demand – creating ripe opportunities for innovation in this area. High quality ingredients, sophisticated flavours ...

### Plant-based Proteins - US

"Consumers are open to plant-based alternative proteins, and while they recognize health concerns as a distinct selling point for these, they will not waver when it comes to taste. There may well be significant opportunity to leverage the flavors of Hispanic cuisines, as there is a strong degree of interest ...

### Managing Your Health - US

Consumers and brands alike are talking about wellness in the face of an uncertain healthcare market and growing health issues. To bring down healthcare expenses, health management is increasingly placed in the hands of consumers who are turning to a variety of sources to improve their wellbeing and receive guidance ...

### International Food Trends - US

"International cuisines, flavors, and ingredients continue to be an area of opportunity in both foodservice and retail. Young consumers in particular represent a key opportunity as they show high interest in international foods but lack the skills required to actually cook international cuisine at home. While many consumers still prefer ...

## Food and Drink - International

### Ethnic Restaurants and Takeaways - UK

“Much of ethnic restaurants and takeaways’ growth will come from businesses driving existing store performances on the back of strong brand management, menu development and home delivery options. ‘Foodism’ continues to fuel demand for new flavours found in ethnic cuisines, specifically among younger Millennials, parents and those living in urban ...

### Cider - UK

“Smaller servings are a promising means for cider companies to attract custom in both the off- and on-trade. These should appeal to the health-conscious through lower alcohol units and calories, and also financially through a lower item price. This latter is arguably especially needed given the pressure on household incomes ...

### Seasonal Dining Trends - US

Seasonal menu items are associated with a positive, treat-based sentiment, which makes them a key focus for foodservice operators. However, with retail maintaining an edge when it comes to seasonal purchases across a variety of categories, foodservice operators need to understand the preferences and demographics of seasonal consumers, while also ...

### Beverage Blurring - US

10% of US adults drink hybrid/fusion drinks in a typical day. While this is dwarfed by more commonly consumed drinks, such as water (81%), carbonated soft drinks (44%), and juice (43%), it’s not a bad showing. Good taste drives consumers’ beverage choices. And while hybrid drinks can capture attention ...

### Retail Venue Catering - UK

“The UK’s love of eating out is providing opportunities for retailers to move into this sector. The boundaries of retail venue catering are increasingly being pushed with a simple supermarket café likely to become a thing of the past. Consumers are used to eating out regularly and in a bid ...