

September 2012

## Yellow Fats and Edible Oils - UK

“Differentiating yellow fats and oils products from competitors in a way tangible to consumers is arguably challenging, given the nature of the product, seeing packaging play a key role in differentiation. Developing or simply actively communicating usability attributes could offer brands standout in the segment.”

## Sports Drinks - US

The estimated \$6.3 billion 2012 sports drinks market was a casualty of the recession and its economic aftermath as consumers switched to lower-priced brands or left the market entirely. The advent of diet sports drinks has helped to drive sales since their introduction in 2009 and growth in this ...

## Vitamins and Supplements - UK

“When it comes to health and wellness today’s information-driven consumers seek advice from a number of quarters but it is recommendation that carries the highest weight influencing purchase of vitamins and supplements amongst six in ten users. With personal recommendations, or those from experts, being the biggest driver for buying ...

## Online Grocery Retailing - UK

“If our recommendations for the rollout of in-store and drive-through collection are implemented by major grocery chains, then their store estates – including c-stores and hypermarkets respectively – become indispensable for fulfilling online orders.

## Bread - US

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

## Breakfast Foods - US

## Organic Food and Drink - UK

“In times where consumers are more value-conscious than ever, the overriding perception that organic produce is overpriced has undoubtedly been at the heart of its demise. But the question marks surrounding what the organic label stands for are also a major barrier. This indicates that greater transparency is needed to ...

## Sandwiches, Subs and Wraps - US

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

## Quick Service Restaurants - US

The recession and subsequent years have had a significant impact on the quick-service (QSR) segment, for both operators and consumers. Value pricing initiatives have kept patrons engaged, but consumer demand, media attention, and the constant threat from competing segments have at the same time driven the fast food industry to ...

## Dark Spirits - US

The dark spirits category is expected to reach an all-time high of \$21.4 billion in total U.S. 2012 estimated sales. The fact that this was accomplished following one of the worst recessions in the country’s history makes the accomplishment all the more impressive. However, growth was not all ...

## Burger and Chicken Restaurants - UK

“Weak brand loyalty and consumer promiscuity continue to dog the chicken/burger bar market with a need for operators to adopt similar strategies as their fast casual competitors in terms of using lifestyle branding techniques to increase their relevancy to specific consumer groups.”

## Vending - US

## Food and Drink - International

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

### Sugar and Sweeteners - US

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

### Ethnic Foods - UK

"British food has long been spurned by the world as being bland and stodgy but the tastebuds of the nation are becoming more adventurous, with over two fifths of ethnic food users continually on the lookout for new and interesting cuisines. Patak's even launched a branded phal – generally the ...

## August 2012

### Wine - UK

"There is marked potential for lower-alcohol wines to grow provided they are able to offer a product which compares favourably with standard-ABV wines while undercutting them notably on price and calorie content."

### Condiments - US

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

### Breakfast Cereals - UK

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

### Meat-free and Free-from Foods - UK

"The sizeable group of health-conscious consumers are ripe for targeting through vegetarian/meat-free foods and meat substitutes, possibly along the lines of 'stealth health', encouraging families to swap a meat-based meal for one that is vegetarian and therefore better for them."

### Attitudes towards Family Dining - UK

"With a wealth of in-home/retail food innovation aimed at children, which is designed to achieve multiple goals (eg appeals to both parents through nutritional claims as well as children through character merchandising), foodservice operators need to up their game in terms of separate children's menus/products."

### Convenience Stores - US

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

### Yogurt and Yogurt Drinks - US

## Food and Drink - International

“The breakfast cereals market has remained largely unchanged in terms of packaging for decades. Yet with almost eight in ten consumers interested in buying a cereal with resealable packaging there is considerable unmet demand for packaging solutions which will keep cereals fresher for longer. There is an opportunity for cereal ...

### Sports and Energy Drinks - UK

“With around three in ten consumers sceptical that sports and energy drinks ‘do what they claim’ the market should take inspiration from the cosmetics industry in terms of proving the science behind the functional claims, helping to justify the category’s position as a more expensive product and alleviate any concerns ...

### Prepared Cakes and Pies - US

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

### Casual Dining - US

Mintel’s consumer survey finds that 52% of respondents visited a casual dining restaurant for lunch and 69% of respondents visited a casual dining restaurant for dinner in the last month. Party size and check average varied by daypart with lunch bringing in an average of \$12.66 per person, while ...

### Pizza - UK

“There does seem to be room in the market for healthier lines but manufacturers must be careful how to market the healthiness. Considering pizza’s strong image as a treat, overtly marketing a new line as low fat or low-calorie may position it too far from anything resembling temptation to succeed ...

### Spanish Consumer Lifestyles: Food and Health - Spain

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

### Innovation on the Menu: Flavor Trends - US

While a restaurant may operate for months, years, and decades on end, the menu rarely stays the same. Flavor preferences and trends come and go, and consumer expectations change with them. Indulgence is important on one hand, but with growing nutritional awareness and pending menu-labeling regulations, offering better-for-you (BFY) items ...

### Nuts and Dried Fruit - US

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

### Dark Spirits - UK

“Many women (and men) are currently being asked to make the large jump from non-users into a market with a demanding image and taste profile. Providing these potential users with a path of progression into more sophisticated whiskies, an approach used effectively by Johnnie Walker in the US, should help ...

### Italian Consumer Lifestyles: Food and Health - Italy

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – France, Italy, Spain, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country and identify and explore specific consumer segments based ...

### German Consumer Lifestyles: Food and Health - Germany

## Food and Drink - International

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – Spain, Italy, France, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country and identify and explore specific consumer segments based ...

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – France, Italy, Spain, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country, and identify and explore specific consumer segments based ...

### July 2012

#### Yogurt and Desserts - UK

“As three in four adults overall have eaten desserts, future growth relies on expanding usage beyond the core occasion after an evening meal. Around one in four dessert users note choosing other treats instead of desserts on the grounds of convenience, highlighting for example packaging and portionability as a potential ...

#### Eating Out Review - UK

“Eating out operators need to ensure that their new menu additions stay ahead of the curve by offering tangible points of difference compared to in-home/retail products in order to justify price differentials between in- and out-of-home dining. It would also help venues to play to the rising tide of ...

#### Home Shopping - UK

“The days when home shopping was distinct from store shopping are over. It's only analysts who try to make the distinction. For everyone else it is just shopping. And shopping is changing rapidly. If there is one clear message of this report it is that home shopping and store shopping ...

#### Social Media: Food - UK

“The food market is presented with a number of challenges to overcome with regards to engaging consumers online. Despite sizeable communities established by some brands within the market, the majority of consumers remain unwilling to form affiliations with brands, rather engaging only when the opportunity of acquiring a discount or ...

#### Tea and RTD Teas - US

Tea and RTD tea market sales are estimated at \$6.7 billion in 2012. While the market exhibited a healthy growth of 15% during 2007-12, the growth slowed considerably in 2011 and 2012 as the biggest market segment, shelf-stable ready-to-drink (RTD) canned/ bottled tea showed signs of stagnation. Additionally, the ...

#### Baby Food and Drink - UK

For baby, only the best will do. In the last decade the baby food and drink market has evolved unrecognisably – giving parents greater choice than ever before. As a nation of food lovers, parents want to expose their babies to a wide variety of flavours to develop their palates ...

#### Pizza at Retail - US

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

#### Smoothies and Shakes: Made to Order - US

Consumers have begun to look towards smoothies, as well as functional smoothies with health add-ins, to fulfill their better-for-you dietary needs and support their on-the-go lifestyle. These items are being consumed as snacks, meal replacements, beverages and desserts, giving the item a great deal of flexibility. The item can also ...

#### Ice Cream - UK

#### Healthy Snacking - US

## Food and Drink - International

“Marketing single-serve products around the notion of a one-off permissible treat should allow brands and own-label players to appeal to the growing proportion of one-person households who are both short on storage space and are reducing their consumption of ice cream for health reasons.”

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

### Alcohol Consumption at Home - US

With total U.S. sales of nearly \$86.3 billion in 2011, the market for alcoholic beverages for off-premise consumption has recorded relatively steady growth during the past five years, increasing 5.1% in 2011 compared to 2010’s \$82 billion, a 3.2% increase from 2009.

### Ice Cream and Frozen Novelties - US

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

### Champagne and Sparkling Wine - UK

“Champagne now faces the very real risk of losing its strongest USP and association, with improvements in quality and the favourable price comparison of sparkling wine posing additional problems for Champagne brands.”

### Drinking Out of the Home - UK

“The hassle involved with queuing is a key disincentive to drinking out of home, as 68% of adults who drink out of home agree that queuing is the most frustrating thing about drinking in pubs and bars. This could be remedied by introducing more table-service zones and faster payment methods ...

### Shopping for Groceries - US

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