

Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"In today's market, most consumers aim to achieve a balanced diet – a middle ground where some unhealthy foods have a place. However, this has led to a decline in light or diet foods with a harsh attack witnessed on sugar in recent years. Meanwhile there is strong demand for highly nutritious food, which is seen to offer added value reflecting the growing interest in superfoods." **Emma McGeown, Research Analyst**

This report looks at the following areas:

- What are the top healthy eating habits?
- What factors do consumers think are important in a healthy diet?
- What are the top healthy eating trends?

Issues covered in this Report

• This Report looks at consumers' attitudes and behaviours related to healthy eating, as well as attributes sought from healthy food. The Report also explores related issues such as the prevalence of dieting, calorie consumption and how consumers view themselves in terms of body type/weight.

• The Launch Activity and Innovation section analyses data from Mintel GNPD (Global New Products Database) focusing on launches featuring functional, minus and/or plus claims. A more detailed discussion of these terms can be found at the beginning of the section.

• Please note that this Report does not include a Market Size and Forecast section due to the unavailability of data on health food and drink sales.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

_{АРАС} +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview What you need to know Issues covered in this Report **Executive Summary** Market factors Most consider themselves 'somewhat healthy' Half of RoI forecast to be obese in 2030 Healthy finances leave consumers with more disposable income The rise in scratch cooking could encourage better healthy eating Health trends Evidence shows a shift towards meat-free Free-from food sees strong momentum Concerns with sugar continue to gain momentum Protein trend riding high The consumer Most meeting the daily recommended amount of calories Figure 1: How many calories (through eating and drinking) consumers estimate they consume on a typical day, NI and RoI, August 2016 Over a third describe themselves as 'average build' Figure 2: How consumers would describe their current body type/weight, NI and RoI, August 2016 Half think 'fresh' is important when buying healthy foods Figure 3: Factors that consumers find to be most important when buying/eating healthy foods, NI and RoI, August 2016 Scratch cooking is the top healthy eating habit Figure 4: Diet and eating habits that consumers claim to typically do, NI and RoI, August 2016 Confusion around 'healthy foods' Figure 5: Agreement with statements relating to healthy eating, NI and RoI, August 2016 What we think **Issues and Insights** What are the top healthy eating habits? The facts The implications What factors do consumers think are important in a healthy diet? The facts The implications What are the top healthy eating trends?

The facts

The implications

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Market – What You Need to Know

Most consider themselves 'somewhat healthy'

Half of RoI forecast to be obese in 2030

Healthy finances leave consumers with more disposable income

The rise in scratch cooking could encourage better healthy eating

Evidence shows a shift towards meat-free

Free-from food sees strong momentum

Concerns with sugar continue to gain momentum

Market Drivers

Most consider themselves somewhat healthy

Figure 6: How consumers describe their typical eating habits and diet, NI and RoI, August 2016

Figure 7: Consumers who describe their eating habits and diet as 'somewhat healthy', by gender and social class, NI and RoI, August 2016

RoI expected to have higher rates of obesity compared to UK

Figure 8: Percentage of consumers who are categorised as obese, UK (including NI) and Ireland, 2010 and 2030 (forecast)

Figure 9: Items eaten more or less if trying to be 'more healthy', Great Britain (GB) and RoI, 2015

Healthy finances leave consumers with more disposable income

Figure 10: How consumers rate their current financial situation, NI and RoI, October 2014-November 2016

Figure 11: Consumer Price Index, by all food and non-alcoholic beverages and all items, UK (including NI), July 2015-October 2016

Figure 12: Consumer Price Index, by all food and all items, RoI, July 2015-October 2016

The rise in scratch cooking could encourage better healthy eating

Figure 13: Consumers who typically eat meals cooked from scratch, by age, NI and RoI, August 2016

Figure 14: Frequency of preparing/cooking meals from scratch, RoI, 2007-15

More scratch cooking done at Christmas

Figure 15: Agreement with the statement 'I am more likely to cook from scratch during the Christmas season', by demographics, NI and RoI, November 2016

Key Health Trends

Evidence that more consumers are embracing vegan and vegetarian diets

Irish consumers reducing meat intake for health reasons

Figure 16: Agreement with the statement 'I am eating more fruit and veg and less meat compared to 12 months ago', by demographics, NI, November 2015 Figure 17: Index of vegan vs vegetarian food and drink launches to the UK & Ireland, 2011-16

Free-from food sees strong momentum

Experimentation with free-from food helping to drive growth

Figure 18: If a consumer's allergy, intolerance or coeliac disease is confirmed by a doctor/dietician, suspected or self-diagnosed, NI and RoI, August 2014

Concerns with sugar continue to gain momentum

Four in 10 will cut back on sugary drinks if they are taxed

Figure 19: If consumers would change their buying behaviour of soft drinks if a 24p/30c per litre sugar tax was introduced, by demographics, NI and RoI, August 2016

Protein trend riding high

The Consumer – What You Need to Know

Most meeting the daily recommended amount of calories

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Over a third describe themselves as 'average build'

Half think 'fresh' is important when buying healthy foods

Scratch cooking is the top healthy eating habit

Confusion around 'healthy foods'

Consumption of Calories

Most consume the daily recommended amount

Figure 20: How many calories (through eating and drinking) consumers estimate they consume on a typical day, NI and RoI, August 2016

Mature and younger consumers least likely to eat 2,000 calories

Figure 21: Consumers who consume (through eating and drinking) 2,000 calories on a typical day, by gender and age, NI and RoI, August 2016

Women more likely to eat fewer than 2,000 calories

Figure 22: Consumers who consume (through eating and drinking) 1500-1750 calories on a typical day, by gender, NI and RoI, August 2016

Men eat more calories than women

Figure 23: Consumers who consume (through eating and drinking) 2500 calories on a typical day, by gender, NI and RoI, August 2016

How Consumers View Their Body Type

Over a third describe themselves as average build

Figure 24: How consumers would describe their current body type/weight, NI and RoI, August 2016

'Average' build is the common body type in Ireland

Figure 25: Consumers who describe their current body type/weight as average build, by age and gender, NI and RoI, August 2016

Mature consumers are more likely to describe themselves as overweight

Figure 26: Consumers who describe their current body type/weight as overweight, by age and gender, NI and RoI, August 2016

Is it better to be underweight or overweight?

Figure 27: Consumers who describe their current body type/weight as underweight or obese, NI and RoI, August 2016

Factors Important When Buying Healthy Foods

Half think 'fresh' is important when buying healthy foods

Figure 28: Factors that consumers find to be most important when buying/eating healthy foods, NI and RoI, August 2016

Fresh important to mature consumers

Figure 29: Consumers who agreed that fresh is the most important factor when buying healthy foods, by gender and age, NI and RoI, August 2016

One of your five-a-day appeals to parents

Figure 30: Consumers who agreed that food contributes to your five-a-day is the most important factor when buying healthy foods, by age of children, NI and RoI, August 2016

Sugar fears may reduce fruit consumption

Low calorie appeals to women and younger consumers

Figure 31: Consumers who agreed that low calorie content is the most important factor when buying healthy foods, NI and RoI, August 2016

Protein appeals to men

Figure 32: Consumers who agreed that high in protein is the most important factor when buying healthy foods, NI and RoI, August 2016

Healthy Eating Habits

Scratch cooking is the top healthy eating habit

Figure 33: Diet and eating habits that consumers claim to typically do, NI and RoI, August 2016

Half of Irish consumers limit salt and sugar

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 34: Consumers who typically limit the amount of sugar or salt they use when cooking or baking, NI and RoI, August 2016

Figure 35: New products launched in food with the claim low/no/reduced sodium and low/no/reduced sugar, UK and Ireland, 2011-16

Women more likely to check ingredient list

Figure 36: Consumers who typically check the ingredients list when trying a new food product, by gender, NI and RoI, August 2016

A fifth of Irish Millennials use a fitness tracker or app

Figure 37: Consumers who typically track their diet and/or exercise (eg using an app/tracker or wearable technology, ie FitBit), by gender and age, NI and RoI, August 2016

Attitudes towards Healthy Eating

Conflicting information confuses healthy-eaters

Figure 38: Agreement with statements relating to healthy eating, NI and RoI, August 2016

Consumers feel bombarded by pressure to be healthy

Irish consumers confused about what's healthy

Figure 39: Agreement with the statement 'I feel there is too much conflicting information on what constitutes a healthy diet (eg is fat actually good for you or not)', by gender and age, NI and RoI, August 2016

Less is more appealing than to diet

Figure 40: Agreement with the statement 'I would prefer to eat less of a standard/ full-fat type of food rather than switch to a diet/lowfat version' and 'There is no need for 'light' or 'diet' products in a balanced diet', NI and RoI, August 2016

Health boosting agents appeal to consumers and they're willing to pay

Figure 41: Agreement with the statement 'I am interested in trying the latest foods claimed to boost your health (eg chia seeds, quinoa)', by gender and age, NI and RoI, August 2016 Figure 42: Agreement with the statement 'It is worth paying more for highly nutritious foods (eg high in vitamins, minerals etc)', by

social class, NI and RoI, August 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Definition

Data sources

Generational cohorts

Abbreviations

Appendix – The Consumer

NI Toluna data

Figure 43: How consumers describe their typical eating habits and diet, by demographics, NI, August 2016

Figure 44: How consumers describe their typical eating habits and diet, by demographics, NI, August 2016 (continued)

Figure 45: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, NI,

August 2016 Figure 46: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, NI, August 2016 (continued)

Figure 47: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, NI, August 2016 (continued)

Figure 48: How consumers would describe their current body type/weight, by demographics, NI, August 2016

Figure 49: How consumers would describe their current body type/weight, by demographics, NI, August 2016 (continued)

Figure 50: Factors that consumers find to be most important when using healthy foods, by demographics, NI, August 2016

Figure 51: Factors that consumers find to be most important when using healthy foods, by demographics, NI, August 2016 (continued)

Figure 52: Factors that consumers find to be most important when using healthy foods, by demographics, NI, August 2016 (continued)

Figure 53: Diet and eating habits that consumers claim to typically do, by demographics, NI, August 2016

Figure 54: Diet and eating habits that consumers claim to typically do, by demographics, NI, August 2016 (continued)

Figure 55: Diet and eating habits that consumers claim to typically do, by demographics, NI, August 2016 (continued)

Figure 56: Agreement with statements relating to healthy eating, by demographics, NI, August 2016

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1367.11 | €1292.10

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 57: Agreement with statements relating to healthy eating, by demographics, NI, August 2016 (continued) Figure 58: Agreement with statements relating to healthy eating, by demographics, NI, August 2016 (continued)

RoI Toluna data

Figure 59: How consumers describe their typical eating habits and diet, by demographics, RoI, August 2016

Figure 60: How consumers describe their typical eating habits and diet, by demographics, RoI, August 2016 (continued)

Figure 61: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, RoI, August 2016 Figure 62: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, RoI. August 2016 (continued) Figure 63: How many calories (through eating and drinking) consumers estimate they consume on a typical day, by demographics, RoI, August 2016 (continued) Figure 64: How consumers would describe their current body type/weight, by demographics, RoI, August 2016

Figure 65: How consumers would describe their current body type/weight, by demographics, RoI, August 2016 (continued)

Figure 66: Factors that consumers find to be most important when using healthy foods, by demographics, RoI, August 2016

Figure 67: Factors that consumers find to be most important when using healthy foods, by demographics, RoI, August 2016 (continued) Figure 68: Factors that consumers find to be most important when using healthy foods, by demographics, RoI, August 2016 continued Figure 69: diet and eating habits that consumers claim to typically do, by demographics, RoI, August 2016

Figure 70: diet and eating habits that consumers claim to typically do, by demographics, RoI, August 2016 (continued)

Figure 71: diet and eating habits that consumers claim to typically do, by demographics, RoI, August 2016 (continued)

Figure 72: Agreement with statements relating to healthy eating, by demographics, RoI, August 2016

Figure 73: Agreement with statements relating to healthy eating, by demographics, RoI, August 2016 (continued)

Figure 74: Agreement with statements relating to healthy eating, by demographics, RoI, August 2016 (continued)

BUY THIS REPORT NOW

VISIT: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 EMAIL: reports@mintel.com