

Attitudes towards Ready Meals and Ready-to-Cook Foods - UK - June 2017

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“That over half of ready meal/ready-to-cook eaters/buyers opt to cook from scratch more when money is tight leaves the sector vulnerable with mounting inflation is expected to put pressure on disposable household incomes. However, premium products should benefit from people choosing these as a money-saving alternative to eating out, but innovation is needed to keep shoppers engaged.”
 – Alice Baker, Research Analyst

This report looks at the following areas:

- Regular innovation could help premium varieties to succeed even as incomes come under pressure
- Scope for expansion in healthier ready meals
- Ethical claims offer promising means to stand out

Products covered in this Report

This Report examines consumers' attitudes and behaviours relating to ready meals and ready-to-cook foods. Mintel's definition includes products sold through the grocery retail channel and direct to consumers including:

Chilled, frozen and shelf-stable ready meals

, including complete and part meals, and meal centres. This includes complete meals such as spaghetti Bolognese and curry with rice. It also includes part meals/meal centres (including burgers in a bap/bun) to which the consumer may, but need not, add items such as vegetables, pasta or rice, such as single ethnic dishes like chicken tikka.

Ready-to-cook foods

are chilled foods specifically positioned as needing no further preparation on the part of the consumer other than opening the packet and cooking the product according to the on-pack instructions. The major grocers have developed their own specific sub-branded ranges of such foods, such as the Sainsbury's Just Cook range. It should be noted that some sectors of the trade use the terms 'part prepared' or 'partially prepared foods' – both terms are deemed to refer to ready-to-cook foods as defined for the purpose of this Report.

'Pies'

that have no pastry content (for example, shepherd's pie) and, therefore, do not conform to Mintel's definition of a pie, are included as ready meals in this Report.

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DID YOU KNOW?

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

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Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market
Inflation expected for the market
Government sets new salt reduction targets
Consumer lifestyle trends could discourage sales
Companies and brands
Private label continues to dominate launches
Little health-led innovation in 2016
Continued growth for high-protein and gluten-free claims
Retailers look to compete with recipe box subscription schemes
Overall advertising spend rises in 2016
Retailers remain dominant in advertising, with a focus on quality
The consumer
89% eat ready meals or RTCs, a third eat chilled at least weekly
Figure 1: Usage frequency for ready meals and ready-to-cook foods, by type, March 2017
Families are the key users
Favourite dish is the primary deciding factor
New twists and in-store sampling could help to expand users' limited repertoires
Figure 2: Ready meal buying factors, March 2017
Prepared meals at risk if incomes come under pressure, but premium versions could benefit
Influence of health considerations offers opportunities for healthier variants
Figure 3: Behaviours relating to ready meals and ready-to-cook foods, March 2017
Ethical claims could be a differentiator
Figure 4: Attitudes towards ready meals and ready-to-cook foods, March 2017
Low quality rating for ready meals suggests negative perceptions still linger
Figure 5: Perceptions of selected types of prepared meals as high quality, March 2017
What we think

Issues and Insights

Regular innovation could help premium varieties to succeed even as incomes come under pressure
The facts
The implications
Scope for expansion in healthier ready meals
The facts

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The implications

Ethical claims offer promising means to stand out

The facts

The implications

The Market – What You Need to Know

Inflation expected for the market

Government sets new salt reduction targets

Consumer lifestyle trends could discourage sales

Market Drivers

Inflation expected to put pressure on producers' margins

Prepared meals at risk if incomes come under pressure

Opportunities remain for premium products as alternative to dining out

Government sets targets for industry to further reduce salt

EFSA rules make it difficult to make a low-salt claim

Consumer lifestyle trends could discourage sales

Potential competition from recipe box delivery services

Companies and Brands – What You Need to Know

Private label continues to dominate launches

Little health-led innovation in 2016

Continued growth for high-protein and gluten-free claims

Retailers look to compete with recipe box subscription schemes

Overall advertising spend rises in 2016

Retailers remain dominant in advertising, with a focus on quality

Launch Activity and Innovation

Private label continues to dominate launches

Asda and Tesco tap into world food trends

Smaller retailers also step up activity

Figure 6: New product launches in the UK prepared meals market, by private label and brands, 2013-17

Little movement on health claims in 2016

Conflicting consumer views on health present a challenge and an opportunity

Supermarkets extend and relaunch diet ranges in 2017

Figure 7: New product launches in the UK prepared meals market, by top 20 claims (sorted by 2016), 2013-17

Continued growth in high protein

Canned food brands release high-protein lunch pots and pouches

No-allergen claims rise in 2016

Five-a-day claims rise as companies seek to latch onto vegetables' health associations

Supermarkets emphasise ingredient provenance as they build up their premium ranges

Premium ingredients and restaurant-inspired descriptions used to build associations with fine dining

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Retailers look to up competition with recipe box schemes
 Weight Watchers offers subscription service for keen dieters
 Retailers and brands explore Brazilian flavours to capitalise on Olympics

Advertising and Marketing Activity

Wiltshire Farm Foods remains the largest advertiser amid a rise in overall spending
 Pushing closeness to homemade foods
 Promoting its international flavours
 Figure 8: Total above-the-line, online display and direct mail advertising expenditure on ready meals and ready-to-cook foods, 2013-17
 Retailers put the focus on quality
 M&S promotes feel-good aspects of its diet meals
 Morrisons highlights its in-store preparation
 Waitrose emphasises ingredient provenance
 Iceland promotes its authentic flavours
 Slimming World range portrayed as ideal for time-pressed healthy eaters
 Spar puts particular emphasis on ready meals' time-saving attributes
 Nielsen Ad Intel coverage

The Consumer – What You Need to Know

89% eat ready meals or RTCs, a third eat chilled at least weekly
 Families are the key users
 Favourite dish is the primary deciding factor
 New twists and in-store sampling could help to expand users' limited repertoires
 Prepared meals at risk if incomes come under pressure, but premium versions could benefit
 Influence of health considerations offers opportunities for healthier variants
 Ethical claims could be a differentiator
 Low quality rating for ready meals suggests negative perceptions still linger

Usage of Ready Meals and Ready-to-Cook Foods

A third eat chilled ready meals once a week or more
 Figure 9: Usage frequency for ready meals and ready-to-cook foods, by type, March 2017
 Families are key users of ready meals...
 ...as are under-25s
 Product labelling helps to boost RTC usage frequency
 Frozen ready meals' lower usage frequency largely stems from the limitations of the frozen aisle
 Meal deals and in-store positioning could help to encourage more frequent usage

Ready Meal Eating Habits

Most users microwave, but over a third oven cook
 Promoting on-hob heating could help some dishes to be seen as closer to their homemade versions
 Figure 10: How ready meals are typically heated, March 2017
 Most users eat ready meals from a separate plate or bowl

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Safe handling features could cater for those eating straight from the container

Figure 11: How ready meals are typically eaten, March 2017

Ready Meal Buying Factors

A favourite dish trumps price for ready meal buyers

New twists and in-store sampling could persuade consumers to expand their limited repertoires

Figure 12: Ready meal buying factors, March 2017

Opportunities for expansion in healthier options

Products with high vegetable content should put this front and centre

Behaviours Relating to Ready Meals and Ready-to-Cook Foods

Prepared meals are vulnerable if incomes come under pressure, but opportunities for premium products

Premium ranges will need to keep innovating

Figure 13: Behaviours relating to ready meals and ready-to-cook foods, March 2017

Over half of eaters/buyers are influenced by health considerations

Healthier variants on classic dishes have strong appeal

Opportunities for expansion in healthy children's meals

Scope for baby food brands to extend their offering to older children

Attitudes towards Ready Meals and Ready-to-Cook Foods

Ethical options have wide appeal

Opportunities for products putting animal welfare credentials front and centre

Charity pledges appeal most to under-25s

Figure 14: Attitudes towards ready meals and ready-to-cook foods, March 2017

Premium products should be particularly well placed to benefit from interest in organic

Resealable packets appeal particularly to parents

Qualities Associated with Selected Types of Prepared Meals

Few see any type of prepared meal as offering high quality

Products using 'imperfect' ingredients could be promoted as reducing food waste

Figure 15: Qualities associated with selected types of prepared meals, March 2017

Image of ready meals as processed means they could lose out from 'clean living' trends

Focus on ingredients could help to create a more 'natural' image

'Deconstructed' versions could help prepared meals to be seen as closer to home cooking

Consumer indifference suggests need for frozen foods to be marketed on taste grounds

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Launch Activity and Innovation

Figure 16: New product launches in the UK prepared meals market 2013-17, by company (sorted by 2016)

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