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### 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.



"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."

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- The facts
- 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

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- Inflation expected to put pressure on producers' margins
- Prepared meals at risk if incomes come under pressure
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- 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
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- Premium ingredients and restaurant-inspired descriptions used to build associations with fine dining
- 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

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- Pushing closeness to homemade foods
- Promoting its international flavours

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- 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

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- 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

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- Promoting on-hob heating could help some dishes to be seen as closer to their homemade versions
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- Most users eat ready meals from a separate plate or bowl
- Safe handling features could cater for those eating straight from the container

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

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- Products with high vegetable content should put this front and centre

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### BEHAVIOURS RELATING TO READY MEALS AND READY-TO-COOK FOODS

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- Premium ranges will need to keep innovating
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- Few see any type of prepared meal as offering high quality
- Products using 'imperfect' ingredients could be promoted as reducing food waste

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- Image of ready meals as processed means they could lose out from 'clean living' trends
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- Consumer indifference suggests need for frozen foods to be marketed on taste grounds

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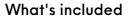
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