

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“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.”

– **Anita Winther, Research Analyst**

This report looks at the following areas:

- **Quick-to-cook microwave pasta is well placed to tap demand for convenience**
- **Stronger image as filling is needed to boost noodle pots' lunch potential**
- **Opportunities to tap demand for five-a-day side dishes**

Volume sales of pasta, rice and noodles fell by 6% over 2012-16 as the growth enjoyed by rice was not strong enough to offset the declines seen in pasta. Growing competition from rice and noodles and negative health perceptions around refined carbohydrates have impacted on pasta sales. However, market volumes saw a 1% uptick in 2017 as the volume decline in pasta eased. Meanwhile, inflation has propped up value sales against the falling volumes, with the market growing by 9% over 2012-17 to an estimated £1.3 billion.

While the near-universal usage of pasta and rice limits the opportunities to expand the user base, opportunities remain for innovation in formats and varieties to drive engagement and trading up. Convenience remains a key driver in the market, supporting continued demand for quick-to-use microwave variants. Meanwhile, looking to beans and legumes as ingredients and additions should appeal to consumers who are looking to reach their five-a-day targets.

**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

DID YOU KNOW?

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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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
Products covered in this Report

Executive Summary

The market
Struggles of pasta see market volumes fall
Inflation is expected to support value growth
Figure 1: Forecast of UK retail value sales of pasta, rice and noodles, 2012-22
Pasta values return to growth
Figure 2: UK retail value sales of pasta, rice and noodles, 2016 and 2017
Inflation puts pressure on operators and consumers
Healthy eating trends impact the market
Companies and brands
Own-label is the big winner across all segments
Heinz sees sales fall in pasta
Uncle Ben's Express Rice sales boosted by price cuts
Strong growth of Naked Noodle continues
Pot Noodle and Pasta 'n' Sauce enter the pot pasta market
Health-focused NPD continues
Advertising support continues to fall
Uncle Ben's lead is rooted in trust, value and quality
The consumer
Pasta and rice are ingrained in Brits' diets
Figure 3: Frequency of eating pasta, rice and noodles, November 2017
Younger consumers and families are key user groups
Usage of alternative types remains low
Figure 4: Types of pasta, rice and noodles eaten, November 2017
Multigrain and quick-to-cook microwave formats have potential in pasta
Figure 5: Behaviours relating to pasta, rice and noodles, November 2017
Instant noodle pots have lunch aisle potential
Figure 6: Attitudes towards pasta, rice and noodles, November 2017
Suiting the main dish is most important choice factor for side dishes
Figure 7: Important factors influencing choice of side dishes, November 2017
Potatoes' strong image creates steep competition
Pasta, rice and noodles are viewed similarly
Figure 8: Correspondence analysis of qualities associated with selected types of side dishes, November 2017
What we think

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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Issues and Insights

Quick-to-cook microwave pasta is well placed to tap demand for convenience

The facts

The implications

Stronger image as filling is needed to boost noodle pots' lunch potential

The facts

The implications

Opportunities to tap demand for five-a-day side dishes

The facts

The implications

The Market – What You Need to Know

Struggles of pasta see market volumes fall

Inflation is expected to support value growth

Pasta values return to growth

Inflation puts pressure on operators and consumers

Healthy eating trends impact the market

Market Size and Forecast

Inflation supports value growth

Figure 9: UK retail value and volume sales of pasta, rice and noodles, 2012-22

The future

Figure 10: Forecast of UK retail value sales of pasta, rice and noodles, 2012-22

Figure 11: Forecast of UK retail volume sales of pasta, rice and noodles, 2012-22

Forecast methodology

Market Segmentation

Pasta values return to growth

Figure 12: UK retail value and volume sales of pasta, by segment, 2015-17

Rice sales continue to grow

Figure 13: UK retail value and volume sales of rice, by segment, 2015-17

Instant hot snacks and noodles see impressive growth

Figure 14: UK retail value and volume sales of instant hot snacks and noodles, by segment, 2015-17

Market Drivers

Cost pressures fuel inflation

Squeeze on household budgets returns

Impact of PHE's starchy foods recommendations is limited

Carbohydrate avoidance is affecting the market

Gluten-free continues to grow

Growth in child population should underpin market

Figure 15: Trends in the age structure of the UK population, 2012-17 and 2017-22

**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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Companies and Brands – What You Need to Know

- Own-label is the big winner across all segments
- Heinz sees sales fall in pasta
- Uncle Ben's Express Rice sales boosted by price cuts
- Strong growth of Naked Noodle continues
- Pot Noodle and Pasta 'n' Sauce enter the pot pasta market
- Health-focused NPD continues
- Advertising support continues to fall
- Uncle Ben's lead is rooted in trust, value and quality

Market Share

- Own-label is the big winner
- Heinz sees sales fall in pasta
 - Figure 16: Leading brands' sales and shares in the UK pasta market, by value and volume, 2016 and 2017
- Price cuts give Uncle Ben's Express Rice a lift
 - Figure 17: Leading brands' sales and shares in the UK rice market, by value and volume, 2015/16 and 2016/17
- Batchelors noodles range sees value growth return
 - Figure 18: Leading brands' sales and shares in the UK noodles market, by value and volume, 2015/16 and 2016/17
- Naked Noodle continues strong growth
 - Figure 19: Leading brands' sales and shares in the UK pot snacks market, by value and volume, 2015/16 and 2016/17

Launch Activity and Innovation

- Relaunches see pasta grow share of launches
 - Figure 20: Share of new product launches in the UK pasta, rice and noodles market, by segment, 2014-17
- Batchelors Super Noodles moves into instant pot snacks
- Pot Noodle and Pasta 'n' Sauce enter the pasta snack pot market
- Cauli Rice rebrands as Fullgreen as it moves beyond cauliflower
- Gluten-free launches remain high
- Tilda launches Super Grains variants
- Santa Maria brings Latin American flavours to the rice category
- Heinz launch stevia-sweetened Hoops
- Heinz and Fiddes Payne extend their licensed kids' portfolios

Advertising and Marketing Activity

- Advertising support continues to fall
 - Figure 21: Total above-the-line, online display and direct mail advertising expenditure on rice, pasta and noodles, 2014-17
- Mars remains the biggest spender
 - Figure 22: Total above-the-line, online display and direct mail advertising expenditure on pasta, rice and noodles, by top 5 advertisers (sorted by 2017), 2014-17
- Unilever goes operatic to support Pot Pasta launch
- Cauli Rice makes TV debut
- Tilda and Laila launch charitable drives

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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Barilla looks to sport to drive engagement
Naked Noodle raises the fashion stakes at London Fashion Week
Nielsen Ad Intel coverage

Brand Research

Brand map
Figure 23: Attitudes towards and usage of selected brands, January 2018

Key brand metrics
Figure 24: Key metrics for selected brands, January 2018

Brand attitudes: High trust in Uncle Ben's is rooted in perceptions of quality
Figure 25: Attitudes, by brand, January 2018

Brand personality: Pot Noodle and Batchelors Super Noodles have a lead as fun
Figure 26: Brand personality – Macro image, January 2018

Napolina and Tilda score highest as authentic
Figure 27: Brand personality – Micro image, January 2018

Brand analysis
Napolina is widely seen as an authentic and traditional brand with family appeal
Figure 28: User profile of Napolina, January 2018

Tilda enjoys the strongest natural image
Figure 29: User profile of Tilda, January 2018

Uncle Ben's popularity is rooted in accessibility, quality and trust
Figure 30: User profile of Uncle Ben's, January 2018

Low levels of usage hamper perceptions of Barilla
Figure 31: User profile of Barilla, January 2018

Batchelors Super Noodles lags as innovative and diverse
Figure 32: User profile of Batchelors Super Noodles, January 2018

Pot Noodle's top associations are with accessible and fun
Figure 33: User profile of Pot Noodle, January 2018

The Consumer – What You Need to Know

Pasta and rice are ingrained in Brits' diets
Younger consumers and families are key user groups
Usage of alternative types remains low
Multigrain has potential in pasta
Quick-to-cook microwave pasta garners interest
Instant noodle pots have lunch aisle potential
Suiting the main dish is most important choice factor for side dishes
Potatoes' strong image creates steep competition
Pasta, rice and noodles are viewed similarly

Usage of Pasta, Rice and Noodles

**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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Pasta and rice are ingrained in the British diet

Noodles are eaten by 70%

Figure 34: Usage of pasta, rice, noodles, couscous and grains, November 2017

Half of Brits eat dry pasta weekly

Younger consumers and families are key user groups

Figure 35: Frequency of eating pasta, rice, noodles, couscous and grains, November 2017

Two in five eat wholegrain pasta or rice

Usage of alternative types remains low

Figure 36: Types of pasta, rice and noodles eaten, November 2017

Behaviours Relating to Pasta, Rice and Noodles

Multigrain has potential in pasta

Figure 37: Behaviours relating to pasta, rice and noodles, November 2017

Quick-to-cook microwave pasta garners interest

Attitudes towards Pasta, Rice and Noodles

Spotlighting high vegetable content should appeal in filled pasta

Figure 38: Attitudes towards pasta, rice and noodles, November 2017

Instant noodle pots have lunch aisle potential...

...but need to work on fillingness

Choice Factors for Side Dishes

Cracking main dish pairings is key to growing usage

Figure 39: Important factors influencing the choice of side dishes, November 2017

Convenience trumps low price

A third look for sides that count towards the five-a-day

Qualities Associated with Types of Side Dishes

Potatoes' strong image creates steep competition

Figure 40: Qualities associated with selected types of side dishes, November 2017

Pasta, rice and noodles are viewed similarly

Emerging world cuisines could boost the image of rice as versatile

Convenience formats should boost familiarity for beans/lentils/pulses

Figure 41: Correspondence analysis of qualities associated with selected types of side dishes, November 2017

Methodology

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

Figure 42: Total UK retail value sales of pasta, rice and noodles, best- and worst-case forecast, 2017-22

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

Pasta, Rice and Noodles - UK - February 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 43: Total UK retail volume sales of pasta, rice and noodles, best- and worst-case forecast, 2017-22

Appendix – Market Share

Figure 44: Leading manufacturers' sales and shares in the UK pasta market, by value and volume, 2016 and 2017

Figure 45: Leading manufacturers' sales and shares in the UK rice market, by value and volume, 2015/16 and 2016/17

Figure 46: Leading manufacturers' sales and shares in the UK noodles market, by value and volume, 2015/16 and 2016/17

Figure 47: Leading manufacturers' sales and shares in the UK pot snacks market, by value and volume, 2015/16 and 2016/17

Appendix – Launch Activity and Innovation

Figure 48: Share of new product launches in the UK pasta, rice and noodles market, by top 10 companies (sorted by 2017), 2014-17

Figure 49: Share of new product launches in the UK pasta, rice and noodles market, by brands and private label, 2014-17

Figure 50: Share of new product launches in the UK pasta, rice and noodles market, by top 10 claims, 2014-17

Figure 51: Share of wholegrain launches in the UK pasta market, 2014-17

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