

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

Consumers don't like eating at retailers Rotisserie chicken is falling from favor Packaged foods pose a threat



The retail prepared foods business is growing quickly year over year, with more people purchasing them and making more frequent purchases. This is largely thanks to prepared foods' ability to deliver affordable convenience and a satisfying variety of options to timestrapped consumers. Grocers are investing in convenience with more tech-enabled ordering, pickup and delivery options for prepared foods.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

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
- Definition

#### **EXECUTIVE SUMMARY**

- What consumers want and why
- The issues
- Consumers don't like eating at retailers

Figure 1: Prepared food attitudes – NET agreement, October 2019

Rotisserie chicken is falling from favor

Figure 1: Prepared food and beverage item purchases, October 2019

Packaged foods pose a threat

Figure 3: Prepared food attitudes – NET any agree, by prepared food user groups, October 2019

- The opportunities
- Prepared foods purchases are growing

Figure 3: Prepared food purchase frequency – NET prepared food user groups and any purchase, October 2018-2019

Off-premise business represents a huge opportunity

Figure 1: Prepared food attitudes – NET agreement, October 2019

Young consumers want to see more beverage concepts at retailers

Figure 2: Prepared food concept interest, by generation, October 2019

#### THE MARKET - WHAT YOU NEED TO KNOW

- Convenience stores bring their A game
- Move over meal kits, new retail threats emerge
- Quickly growing demographics indicate positive prepared foods future

#### MARKET PERSPECTIVE

- · C-stores jump on health and wellness trends
- Next-level convenience in retail

#### **MARKET FACTORS**

Away-from-home sales outpace at-home sales

Figure 1: Share food expenditures for in-home food vs dining out, 2013-18

#### What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

#### Report Price: £3695 | \$4995 | €4400

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



Asian and Hispanic populations are quickly growing
 Figure 9: Population by race and Hispanic origin, 2014-24

rigure 9. r opulation by race and r iispanic origin, 2014-27

Urbanization persists

#### **KEY TRENDS – WHAT YOU NEED TO KNOW**

- · LSRs thrive, FSRs strive
- Love for the local
- Grocerants adopt restaurant tech

#### WHAT'S WORKING?

- Prepared foods cater to convenience
- Local goes a long way
- Beverage concepts proliferate
- What's next?
- What's next?
- Special diet

#### WHAT'S STRUGGLING?

- Grocery store full-service restaurants and bars
- Freshness perceptions at traditional grocers

#### WHAT'S NEXT?

- Next-level restaurant and retail blurring
- Hyperlocal ingredients

### THE CONSUMER - WHAT YOU NEED TO KNOW

- Prepared foods business is booming
- Convenience is top motivator for prepared foods purchases
- · Packaged foods represent growing threat

#### PREPARED FOOD PURCHASE FREQUENCY

 Prepared food purchases and purchase frequency are up from 2018

Figure 17: Prepared food purchase frequency – NET prepared food user groups and any purchase, October 2018–2019

City dwellers propel prepared food sales

Figure 9: Prepared food user groups, by location, October 2019

Men drive prepared food business

Figure 6: Prepared food user groups, by gender, October 2019

Millennials in particular drive prepared food growth

#### What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

#### Report Price: £3695 | \$4995 | €4400

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



Figure 7: Prepared food user groups, by generation, October 2019

 Asian and Hispanic consumers are heaviest users of prepared foods

Figure 8: Prepared food user groups, by race and Hispanic origin, October 2019

#### PREPARED FOOD PURCHASE LOCATION

Supermarkets are losing share of prepared food purchases year over year

Figure 10: Prepared food purchase location, October 2018-2019

 Younger consumers are sourcing prepared foods from a wider variety of locations

Figure 11: Prepared food purchase location, by generation, October 2019

#### YEAR-OVER-YEAR CHANGE IN PREPARED FOOD PURCHASES

 Consumers confirm that they're buying prepared foods more frequently year over year

Figure 5: Year-over-year change in prepared food purchases, October 2018-2019

 Younger Millennials are most likely to report buying prepared foods more often year over year

Figure 13: Year-over-year change in prepared food purchases, by generation, October 2019

Convenience drives prepared food purchases
 Figure 6: Prepared food purchase motivators, October 2019

 The more money consumers earn, the more likely they are to enjoy dining at grocery stores

Figure 15: Prepared food purchase motivators, by income, October 2019

 Cost and health are top barriers to prepared food purchases

Figure 7: Prepared food purchase barriers, October 2019

### PREPARED FOOD AND BEVERAGE ITEM PURCHASES

 Most prepared food consumers purchase rotisserie chicken, freshly baked goods

Figure 18: Prepared food and beverage item purchases – NET any chicken, any beverage, October 2019

 Gen Z is more engaged with fried than rotisserie chicken
 Figure 19: Prepared food and beverage item purchases, by generation, October 2019

#### What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

#### Report Price: £3695 | \$4995 | €4400

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



 Lower- and middle-income consumers are equally engaged with fried and rotisserie chicken

Figure 20: Prepared food and beverage item purchases – NET any beverage, by income, October 2019

Prepared beverages and sandwiches are top-of-mind for convenience

Figure 16: Prepared food and beverage item purchases – NET any chicken, any beverage, by prepared food purchase location, October 2019

#### PREPARED FOOD COMPETITIVE ASSOCIATIONS

 Grocery stores need to improve prepared food consistency and family friendliness to compete more with restaurants

Figure 20: Correspondence Analysis – Symmetrical map – Retail and foodservice blurring, October 2019
Figure 21: Prepared food competitive associations, October 2019

#### PREPARED FOOD CONCEPT INTEREST

 Consumers prefer prepared beverage stations to restaurants at grocery stores

Figure 22: Prepared food concept interest – NET any rank, October 2019

Young consumers drive demand for prepared beverage concepts

Figure 23: Prepared food concept interest – NET any rank, by generation, October 2019

 Lower-income consumers drive demand for prepared beverage and restaurant concepts at grocery stores

Figure 24: Prepared food concept interest – NET any rank, by income, October 2019

#### PREPARED FOOD ATTITUDES

 Free wi-fi can encourage prepared food consumers to dine inside grocery stores

Figure 25: Prepared food attitudes – NET agreement, October 2019

 CPG is greater threat to prepared foods among core male customer base

Figure 27: Prepared food attitudes – NET any agree, by gender, October 2019

 Young consumers drive demand for prepared food online ordering and delivery

#### What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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

## Report Price: £3695 | \$4995 | €4400





Figure 26: Prepared food attitudes – NET any agree, by generation, October 2019

 Hispanic prepared food consumers drive growth of offpremise prepared food business

Figure 28: Prepared food attitudes – NET any agree, by race and Hispanic origin, October 2019

 Heavy Users of prepared food want more convenient offpremise options

Figure 25: Prepared food attitudes – NET any agree, by prepared food user groups, October 2019

#### APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Consumer survey data
- Consumer qualitative research
- Direct marketing creative
- Abbreviations and terms
- Abbreviations
- Terms

#### **APPENDIX - THE CONSUMER**

Figure 36: Households with own children under age 18, by age of householder, 2018

Figure 28: Prepared food attitudes, by stores visited for prepared foods, October 2019

Correspondence Analysis Methodology

#### What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
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



# **About Mintel**

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.