

World Cuisines - UK - March 2019

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.



“Recipe promotions for world cuisine dishes with all the ingredients located together in-store are a highly attractive proposition for shoppers. These will encourage experimentation while tapping into consumers’ desire to become more knowledgeable about world cuisines.”
 – **Emma Clifford, Associate Director – UK Food and Drink**

This report looks at the following areas:

- **Companies should be more active in capitalising on the meat reduction trend**
- **Feeding consumers’ hunger to become more knowledgeable will build engagement**
- **Food pairing suggestions can span beyond the usual world cuisine accompaniments**

The world cuisines retail market is one of the key beneficiaries of the “foodie” mindset which prevails among the younger generation. It is enjoying healthy growth, with high levels of innovation feeding consumers’ appetite for experimentation in this category. Retail sales enjoyed their second consecutive year of 5% growth, taking these to £1,776 million in 2018.

Value sales are anticipated to rise by a further 16% over the next five years to hit £2,065 million in 2023. A combination of food price inflation and the ever-growing choice of products available, especially for emerging cuisines, will underpin this growth.

**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

World Cuisines - UK - March 2019

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

Robust growth in world cuisines continues into 2018

Figure 1: Best- and worst-case forecast of UK retail value sales of world cuisine foods, 2013-23

Mexican/Tex-Mex segment and meal accompaniments/ingredients are top performers

Stiff competition from foodservice

Foodservice and retail trends interlinked

Spending power affects the balance between foodservice and retail

Health remains high on the agenda

Companies and brands

Own-label takes the lion's share of world cuisines sales

Steady growth from Charlie Bigham's and The Spice Tailor in Indian foods

Kikkoman and Gressingham only brands to grow sales in Chinese cuisine

Old El Paso and Santa Maria return to growth

More foodservice brands enter into retail

Street food trend continues to gather momentum

Plant-based NPD and world cuisines go hand in hand

Ongoing slump in adspend from major brands

The consumer

World cuisines deeply embedded in UK food culture

Figure 2: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by type, November 2018

Two fifths of adults ate at least five different types of cuisines

Figure 3: Repertoire of types of world cuisines eaten at home in the last three months, November 2018

Meal accompaniments, cooking sauces, ready meals and seasonings/spices are the most popular products

Figure 4: Types of world cuisine products eaten or used in the last three months, November 2018

Easiness is the most important factor

Figure 5: Choice factors for world cuisine products, November 2018

A traditional recipe is the most compelling marker of authenticity

Figure 6: Factors denoting an authentic world cuisine product, November 2018

In-store initiatives can encourage experimentation

Figure 7: Behaviours relating to world cuisines, November 2018

Food pairing is a popular concept in world cuisines

Figure 8: Attitudes towards world cuisines, November 2018

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

World Cuisines - UK - March 2019

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

Companies should be more active in capitalising on the meat reduction trend

The facts

The implications

Feeding consumers' hunger to become more knowledgeable will build engagement

The facts

The implications

Food pairing suggestions can span beyond the usual world cuisine accompaniments

The facts

The implications

The Market – What You Need to Know

Robust growth in world cuisines continues into 2018

Mexican/Tex-Mex cuisine was the star performer

Momentum in accompaniments/ingredients gains pace

Healthy value growth set to endure

Stiff competition from foodservice

Foodservice and retail trends interlinked

The popularity of home cooking is ingrained

Spending power affects the balance between foodservice and retail

Health remains high on the agenda

Market Size and Forecast

Robust growth in world cuisines continues into 2018

Figure 9: Total UK retail value sales of world cuisine foods, 2013-23

Robust value growth set to endure

Figure 10: Best- and worst-case forecast of UK retail value sales of world cuisine foods, 2013-23

Forecast methodology

Market Segmentation

Ready meals dominate spend

Momentum in accompaniments/ingredients gains pace

Cooking sauces show slowing growth, driven by inflation

Figure 11: UK retail value sales of world cuisine foods, by format, 2016-18

Competition continues to mount for the leading Indian segment

Figure 12: UK retail value sales of world cuisine foods, by cuisine, 2016-18

Mexican/Tex-Mex the star performer of 2018

Growth from other cuisines plateaus

Figure 13: UK retail value sales of world cuisine foods, by cuisine type and format, 2016-18

Market Drivers

Stiff competition from foodservice

**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

World Cuisines - UK - March 2019

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.

Mounting pressure on retail, particularly from home takeaway/home delivery

Foodservice and retail trends interlink

Figure 14: Venues visited, November 2018

The popularity of home cooking is ingrained

Figure 15: Type of evening meal cooked/prepared most often in household, by age, April 2018

Home cooks welcome convenient "hacks"

Convenience products can prompt experimentation

Spending power affects the balance between foodservice and retail

Health remains high on the agenda

Healthy world cuisine products are highly attractive

The healthy associations of spices are favourable for world cuisines

Strong interest in gut health boosts the profile of fermented foods

Figure 16: Examples of UK food launches featuring kimchi, 2018

The flexitarian and vegan trends gather more momentum

World cuisines playing an important part in this movement

Companies and Brands – What You Need to Know

Own-label takes the lion's share of world cuisines sales

Steady growth from Charlie Bigham's and The Spice Tailor

Kikkoman and Gressingham only brands to grow sales in Chinese cuisine

Old El Paso and Santa Maria return to growth

More foodservice brands enter into retail

Street food trend continues to gather momentum

Plant-based NPD and world cuisines go hand in hand

Ongoing slump in adspend from major brands

Market Share

Own-label takes the lion's share of world cuisines sales

Steady growth from Charlie Bigham's and The Spice Tailor in Indian segment

Figure 17: Leading brands in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2016-18

Figure 18: Leading manufacturers in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2016-18

Kikkoman and Gressingham only brands to grow sales in Chinese food in 2018

Figure 19: Leading brands in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2016-18

Figure 20: Leading manufacturers in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2016-18

Old El Paso and Santa Maria return to growth

Figure 21: Leading brands in the Mexican/Tex-Mex ready meals, cooking sauces and accompaniments/ingredients market, by value, 2016-18

Figure 22: Brands and own-label in the Thai ready meals market, by value, 2016-18

Launch Activity and Innovation

More foodservice brands enter into retail

Las Iguanas and Wasabi make retail debut in Sainsbury's

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

World Cuisines - UK - March 2019

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.

Giraffe enters the retail space at Tesco

Figure 23: Examples from the Wasabi and Giraffe range of ready meals, 2018-19

Wahaca retail offering given an overhaul

Figure 24: Examples from the Wahaca range of taco kits, August 2018

Street food trend continues to gather momentum

Schwartz launches street food seasoning mix

Figure 25: Examples from the Schwartz Street Food Seasoning range, June 2018

Iceland extends Street Co ready meals to Mexican cuisine

Walkers harnesses the buzz around street food in its snacking NPD

Speed and convenience continue to be a key NPD theme

Nando's makes restaurant-inspired cooking easier with Bag & Bake range

Patak's launches Oven Bakes for easy lighter meals

The Spice Tailor launches a speedy alternative to a marinade

Colman's adds Seasoning Blends, tapping interest in healthier, more natural meals

Figure 26: Examples of launches from Nando's, The Spice Tailor and Colman's, 2018

Maggi moves towards a cleaner label with relaunch

Pot snacks get more authentic and premium

Levi Roots makes debut in snack pots

Snack pots attract more premium launches

Figure 27: Examples of new launches of instant snack pots with a more premium positioning, 2018

Ongoing innovation in meal kits

School of Wok unveils bao buns kits in Tesco stores

Figure 28: Example from the School of Wok Bao Bun Kit range, August 2018

Aldi launches "copycat" rival to Old El Paso Mexican range

Plant-based NPD and world cuisines go hand in hand

Figure 29: Examples from the Birds Eye range of Veggie Bowls, September 2018

Figure 30: Examples from the Bol range of ready meals, 2019

Advertising and Marketing Activity

Ongoing slump in adspend from major brands

Figure 31: Total above-the-line, online display and direct mail advertising expenditure by selected world cuisine brands*, 2015-18

Mars keeps spend steady for Uncle Ben's

Old El Paso gains position as second-highest spender

Old El Paso supports Day of the Dead

Kikkoman makes TV comeback for Chinese New Year 2019

Tilda celebrates diversity of British food culture

Blue Dragon emphasises authenticity through a culinary journey

Schwartz supports launch of Street Food Seasonings

Patak's partners with Jamie Oliver for social media campaign

Lee Kum Kee continues its 'Awaken Your Soy Senses' campaign

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

World Cuisines - UK - March 2019

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.

Nielsen Ad Intel coverage

Start-ups and Disruptors Case Study – World of Zing

Company overview

What is it?

Founded

Company mission statement

Founder's story

Mintel analyst view

Mintel Trends

Why it could succeed

Why it could fail

The verdict

Product information

Figure 32: World of Zing product range, February 2019

Media profile

Social media metrics

Figure 33: Social media metrics for World of Zing as of January 2019

The brand's view

Revenue in the last year (as of 1 December 2018):

Sources of funding and support

Target audience

What consumer needs does the range meet?

Product stockists

Looking to the future

Start-ups and Disruptors Case Study – Mr. Lee's Pure Foods Co.

Company overview

What is it?

Founded

Company mission statement

Founder's story

Mintel analyst view

Mintel Trends

Why it could succeed

Why it could fail

The verdict

Product information

Figure 34: Mr. Lee's Pure Foods Co., February 2019

Media profile

Social media metrics

**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

World Cuisines - UK - March 2019

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 35: Social media metrics for Mr. Lee's Pure Foods Co. as of February 2019

- The brand's view
- Sources of funding and support
- Target audience
- What consumer needs does the range meet?
- Product stockists
- Looking to the future

The Consumer – What You Need to Know

- World cuisines are deeply embedded in UK food culture
- Two fifths of adults ate at least five different types of cuisines
- Meal accompaniments, cooking sauces, ready meals and seasonings/spices are the most popular products
- Ease is the most important factor
- One in three seek out healthy options
- A traditional recipe is the most tangible marker of authenticity
- In-store initiatives can encourage experimentation
- Consumers hunger to become more knowledgeable
- Scope for world cuisines to harness the meat reduction trend
- Food pairing is a popular concept in world cuisines

Usage of World Cuisines at Home

World cuisines deeply embedded in UK food culture

Figure 36: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by type, November 2018

Widespread interest in branching out to new cuisines

Two fifths of adults ate at least five different types of cuisines...

...jumping to 60% of under-25s

Figure 37: Repertoire of types of world cuisines eaten at home in the last three months, November 2018

Usage frequency is fairly low for each individual cuisine

Figure 38: Frequency of eating world cuisines at home in the last three months, by type, November 2018

World Cuisine Products Eaten or Used at Home

Meal accompaniments are most popular product

Authentic, premium products can enhance world cuisine meals

Figure 39: Types of world cuisine products eaten or used in the last three months, November 2018

Strong appeal of cooking sauces endures

Ready meals are a popular choice across all age groups

Seasonings/spices tap popularity of scratch cooking

Consumers tend to shop across world cuisine categories

Figure 40: Repertoire of types of world cuisine products eaten or used in the last three months, November 2018

Choice Factors for World Cuisine Products

Easiness is the most important factor...

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

World Cuisines - UK - March 2019

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.

...for home cooking overall...

Figure 41: Choice factors for world cuisine products, November 2018

...and for world cuisines meals

Appealing to all of the family is key for mums

Customisation can help to drive family appeal

Ready meals are perfectly positioned to cater to different tastes

One in three seek out healthy options

Better-for-you NPD will be popular

Shoppers can be steered to authentically healthier choices

A need to deliver on taste and excitement alongside health

Figure 42: Examples of world cuisine ready meals launches scoring above average as healthy and have a high instant reaction, as well as being seen as tasty and exciting

Factors Denoting an Authentic World Cuisine Product

An authentic recipe only makes a top three choice factor for 24% of users...

...although this belies the attractiveness of authentic products

A traditional recipe is the most tangible marker of authenticity

Figure 43: Factors denoting an authentic world cuisine product, November 2018

Naturalness is a key indication of authenticity

Behaviours Relating to World Cuisines

In-store initiatives can encourage experimentation

The sheer amount of recipes available makes guidance important

Figure 44: Waitrose Beautifully Simple fridge showcasing a recipe and ingredients, October 2018

Figure 45: Behaviours relating to world cuisines, November 2018

A hunger to become more knowledgeable

Information about the history and provenance of dishes should boost associations with authenticity

Scope for companies to offer a multisensory experience

Attitudes towards World Cuisines

Scope for world cuisines to harness the meat reduction trend

Figure 46: Attitudes towards world cuisines, November 2018

More recipe inspiration would be welcomed...

...with scope to go beyond on-pack

In-store positioning can remind shoppers of the importance of pairing world cuisines components for an elevated meal experience

World cuisines can look to drinks pairings too

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast methodology

Figure 47: Best- and worst-case forecast of total UK retail value sales of world cuisine foods, 2018-23

**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

World Cuisines - UK - March 2019

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.

**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