

## World Cuisines - UK - March 2020

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.



“World cuisines are an ingrained part of UK menus. Within established cuisines strong demand for newness points to opportunities for introducing new formats, whilst providing on-pack explanations of unfamiliar dishes should help emerging cuisines grow their user base.”  
– **Alice Pilkington, Research Analyst**

This report looks at the following areas:

- Dominant cuisines can mine strong demand for new varieties
- Making short preparation time clearer on-pack is key to winning over time-poor consumer
- Tailoring to taste will also help world cuisines respond to new trends
- Clear on-pack explanations can combat consumer distrust of new product names

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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](mailto: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 2020

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

Value growth slows whilst volume stagnates in 2019

Figure 1: Best- and worst-case forecast of UK retail value sales of world cuisine foods, 2014-24

Ready meals decline, healthy growth continues for accompaniments/ingredients

Foodservice continues to both influence and infiltrate retail

Versatile world cuisines can capitalise on meat-free trend

Companies and brands

Own-label continues to dominate world cuisine market

Foodservice brands expand in retail

Convenient formats aid accessibility of world cuisines

Skewer kits aim to maintain interest in established cuisines

Plant-based ranges embrace world cuisines

Old El Paso launches biggest ever campaign to 'Make Some Noise'

Charlie Bigham and Blue Dragon link with authenticity

The consumer

World cuisines are an ingrained part of consumers' menus

Figure 2: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by type, November 2019

Umami flavours should be called out more

Figure 3: Types of flavours preferred most when eating world cuisines at home, November 2019

Sub-20 minute prep and help to bring new life to leftovers appeal

Figure 4: World cuisine product concepts of interest, November 2019

High demand for variety within favourite cuisines

Figure 5: Behaviours relating to world cuisines, November 2019

World cuisine products have potential to inject excitement into British dishes

Figure 6: Attitudes towards world cuisines, November 2019

What we think

### Issues and Insights

Dominant cuisines can mine strong demand for new varieties

The facts

The implications

Making short preparation time clearer on-pack is key to winning over time-poor consumer

The facts

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## World Cuisines - UK - March 2020

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.

### The implications

Tailoring to taste will also help world cuisines respond to new trends

### The facts

### The implications

Clear on-pack explanations can combat consumer distrust of new product names

### The facts

### The implications

## The Market – What You Need to Know

Value growth slows whilst volume stagnates in 2019

Continued value growth ahead

Ready meals decline, healthy growth continues for accompaniments/ingredients

Foodservice continues to both influence and infiltrate retail

Versatile world cuisines can capitalise on meat-free trend

## Market Size and Forecast

Value growth slows whilst volume stagnates in 2019

Figure 7: Total UK retail value sales of world cuisine food, 2014-24

Continued value growth ahead

Figure 8: Best- and worst-case forecast of UK retail value sales of world cuisine foods, 2014-24

Forecast methodology

## Market Segmentation

Ready meals decline

Figure 9: UK retail value sales of world cuisine foods, by format, 2017-19

Healthy growth continues for accompaniments/ingredients

Cooking sauces recover from 2018 stagnation

Growth slows for established cuisines

Figure 10: UK retail value sales of world cuisine foods, by cuisine, 2017-19

Mexican segment sees minor decline

Figure 11: UK retail value sales of world cuisine foods, by cuisine and format, 2017-19

## Market Drivers

Action on Salt finds “unnecessary” levels of salt in popular sauces

Foodservice continues to both influence and infiltrate retail

Versatile world cuisines can capitalise on meat-free trend

Environmentally friendly packaging is in the spotlight

Potential for Brexit and COVID-19 to benefit the world cuisines retail market

Uptake of world cuisines will continue to rise

## Companies and Brands – What You Need to Know

Own-label continues to dominate world cuisine market

Foodservice brands expand in retail

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

## World Cuisines - UK - March 2020

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.

Convenient formats aid accessibility of world cuisines

Skewer kits aim to maintain interest in established cuisines

Plant-based ranges embrace world cuisines

Old El Paso launches biggest ever campaign to 'Make Some Noise'

Charlie Bigham and Blue Dragon link with authenticity

### Market Share

Own-label continues to dominate world cuisine market

Cooking sauce brands lead the Indian segment

Figure 12: Leading brands in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2018 and 2019

Figure 13: Leading manufacturers in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2018 and 2019

Blue Dragon leads a fragmented Chinese segment

Figure 14: Leading brands in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2018 and 2019

Figure 15: Leading manufacturers in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2018 and 2019

Old El Paso retains top position in Mexican

Figure 16: Leading brands in the Mexican ready meals, cooking sauces and accompaniments/ingredients market, by value, 2018 and 2019

### Launch Activity and Innovation

Foodservice brands expand in retail

Nando's brings spice to meal kits

Figure 17: Nando's extends into meal kits, 2019

Itsu links with M&S for ramen range...

Figure 18: Examples of Itsu's new retail products, 2019-20

...in the wake of a string of ramen kit launches

Fusion trend continues to influence NPD

Sharwood's rolls out Street Food Wrap Kits, Aldi launches fajita burger

Figure 19: Sharwood's Street food katsu curry wrap kit, 2019

Capsicana embraces Latin American fusion

Convenient formats aid accessibility of world cuisines...

Snack pots make world cuisines quick and easy to prepare

Figure 20: Twistd Flavour Co. Moroccan Inspired Cous Cous & Lentils, 2019

Slow cooking simplified by Homepride

No-mess solutions

Figure 21: Potts Piri Piri Marinating Bag, 2019

Figure 22: Uncle Ben's 'One pot' Solutions, 2019

...and new formats help to maintain interest in category

Skewer kits emerge

Figure 23: Patak's Street Food Fiery Gunpowder Skewers Kit, 2019

Figure 24: Blue Dragon and Thai Taste skewer kits, 2019

Sainsbury's emphasises Indian regions in new premium ready meals

Figure 25: Sainsbury's new premium Indian regional meals, 2019

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

## World Cuisines - UK - March 2020

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.

Korean offering expands

Yogiyo builds interest in emerging cuisines

Figure 26: Yogiyo Original Udon Ramen Kit, 2019

Gochujang paste adds spice to the market

Plant-based ranges embrace world cuisines

Figure 27: Examples of vegetarian and plant-based world cuisine options from leading UK grocers, 2019

Mars adds new vegetarian-friendly Tasty Bite range

Figure 28: Examples of Mars Food's Tasty Bite Range, 2019

### Advertising and Marketing Activity

Old El Paso launches biggest ever campaign to 'Make Some Noise'

Figure 29: Total above-the-line, online display and direct mail advertising expenditure on world cuisine, 2019

Kikkoman looks to expand ways consumers use soy sauce

'Only Delicious Will Do' for Charlie Bigham

Blue Dragon urges consumers to 'Keep Exploring'

Itsu launches integrated campaign to promote restaurant and grocery gyoza range

Nielsen Ad Intel coverage

### The Consumer – What You Need to Know

World cuisines are an ingrained part of consumers' menus

Chinese and Indian dominate but considerable interest in less established cuisines

Umami flavours should be called out more

Sub-20 minute prep appeals widely

World cuisines can win favour by helping to bring new life to leftovers

High demand for variety within favourite cuisines

World cuisine products have potential to inject excitement into British dishes

Brands need to provide on-pack explanations of new dishes

### Usage of World Cuisines at Home

World cuisines are an ingrained part of consumers' menus

Chinese and Indian dominate but considerable interest in less established cuisines

Figure 30: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by type, November 2019

Under-45s are core users of world cuisines

Figure 31: Eating Chinese and Indian food at home at least once a week, by age, November 2019

Two in five adults eat at least five cuisines

Figure 32: Repertoire of types of world cuisines eaten, by age, November 2019

### World Cuisine Products Eaten or Used at Home

Meal accompaniments, seasonings and cooking sauces are among top products

Figure 33: Types of world cuisine products eaten or used in the last three months, November 2019

Ready meal users hold untapped potential for condiments

### Flavour Type Preferences in World Cuisines

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

## World Cuisines - UK - March 2020

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.

### Umami flavours should be called out more

Figure 34: Types of flavours preferred most when eating world cuisines at home, November 2019

### Spotlight on umami can help engage flexitarians

Figure 35: Examples of products calling out umami flavours on their packaging, 2016-19

### Interest in aromatic flavours holds potential for Middle Eastern cuisine

## World Cuisine Product Concepts of Interest

### Sub-20 minute prep appeals widely

Figure 36: World cuisine product concepts of interest, November 2019

Figure 37: Examples of brands making preparation time a central part of their on-front packaging, 2019-20

### World cuisines can win favour by helping to bring new life to leftovers

### Tailoring to taste chimes widely

Figure 38: Itsu Teriyaki Chicken & Sticky Rice Meal Kit demonstrating the flexibility of its product, 2020

Figure 39: Examples of recommendations for tailoring to taste in world cuisine products, 2019

Figure 40: Uncle Ben's Caribbean Jerk Inspired One Pot Rice Kit calling for spice level to be adjusted to taste, 2019

## Behaviours Relating to World Cuisines

### High demand for variety within favourite cuisines

Figure 41: Behaviours relating to world cuisines, November 2019

### Expanding formats can provide a sense of newness

### Meal deals provide choice, convenience and affordability

## Attitudes towards World Cuisines

### World cuisine products have potential to inject excitement into British dishes

Figure 42: Attitudes towards world cuisines, November 2019

### Brands need to provide on-pack explanations of new dishes

Figure 43: Examples of Sainsbury's Taste the Difference ready meals giving details of regional cuisines, 2020

Figure 44: CJ Foods Bibigo Mandu Beef Bulgogi Dumplings packaging with explanation of the terms mandu and bulgogi, 2019

### Further opportunities for world cuisines to capitalise on the big night in

Figure 45: Recent examples of world cuisine flavours in snacks, 2019-20

## Appendix – Data Sources, Abbreviations and Supporting Information

### Abbreviations

### Consumer research methodology

## Appendix – Market Segmentation

Figure 46: Consumers' frequency of cooking meals from scratch, 2016-19

## Appendix – Market Size and Forecast

### Forecast methodology

Figure 47: Best- and worst-case forecast of UK retail value sales of world cuisine foods, 2019-24

## Appendix – Market Share

Figure 48: Brands and own-label in the Thai ready meals market, by value, 2018 and 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)