

World Cuisines - UK - 2022

Report Price: £2195 | \$2995 | €2600

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:

- Usage frequency of world cuisines at home and the types of products eaten.
- Launch activity in 2021 and opportunities for 2022.
- Choice factors when trying a new world cuisine dish.
- Concepts of interest in world cuisines.
- Consumer behaviours related to world cuisines and attributes associated with selected world cuisines.

Eating a familiar dish with a twist has encouraged 46% of world cuisine eaters to further explore the cuisine from which the 'twist' originates. That these dishes are used as a stepping stone highlights how authentic world cuisine products are reliant on hybrid ones to break down barriers to trial, even for many of those who see themselves as adventurous when it comes to this category.

Pressure on household incomes prompts many people to limit meals out, and to favour at-home meals and cooking to save money. The world cuisines retail market offers affordable ways to recreate ethnic restaurant experiences at home. This is likely to chime in 2022, boding well for sales.

34% of world cuisine eaters say that emerging world cuisines (eg Korean, Middle Eastern) have replaced the more established ones (eg Indian, Chinese) in their regular meal choices. Whilst this spells good news for less established cuisines, it will inevitably serve to limit the growth of the market long term.

39% of world cuisine eaters say they would like to see more world cuisine products that are suitable for use with both meat and meat-free dishes. This openness to world cuisine products that offer such choice bodes well for the market to be able to tap into the predicted sustained focus on health and sustainability long term.



"The world cuisine retail market will benefit from these products offering an affordable alternative to eating out as incomes are squeezed in 2022. Familiar dishes 'with a twist' can help lower barriers to trial for less established cuisines, whilst versatile products suitable for meat-containing and meat-free meals can tap into the long-term flexitarian trend."

- Alice Pilkington, Food and Drink Analyst, May 2022

Buy this report now

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

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Market context
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for world cuisines**
Figure 1: Category outlook, 2022-27
- **The market**
- **World cuisine market's sales level out as COVID-19 boost fades**
- **Income squeeze will continue to support world cuisines market**
- **Competition from foodservice will regain momentum in 2024**

Figure 2: Market forecast for retail value sales of world cuisine foods, 2016-26

- **Ready meals sales rebound in 2021 whilst accompaniments/ ingredients and cooking sauces fall back**
Figure 3: UK retail value sales of world cuisines, by segment, 2019-21
- **Less established cuisines continue to grow as their established rivals struggle**
- **Inflationary pressures squeezing household incomes**
- **Companies and brands**
- **Own-label continues to dominate world cuisine market**
- **Patak's sales drop in Indian segment while Charlie Bigham's continues grow**

Figure 4: UK retail value sales of leading brands in the Indian ready meals, cooking sauces and accompaniments/ ingredients market, by value, 2020 and 2021

- **Blue Dragon leads in a declining Chinese segment**
Figure 5: UK retail value sales of leading brands in the Chinese ready meals, cooking sauces and accompaniments/ ingredients market, by value, 2020 and 2021
- **The consumer**
- **World cuisines continue to enjoy almost universal usage**
Figure 6: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by cuisine, 2022

- **Younger demographics have higher usage frequency and wider repertoires**

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

Figure 7: Repertoire of types of world cuisines eaten, by age, 2022

- Usage of all world cuisine products remains steady**

Figure 8: Types of world cuisine products eaten or used in the last three months, 2019-22

- Familiar techniques can prompt experimentation, spelling out the flavour profile appeals to a quarter**

Figure 9: Prompts for trying a new world cuisine dish at home, 2022

- At-home lunch occasion and familiar dishes with a twist hold opportunities**

Figure 10: Behaviours related to world cuisines, 2022

- Help on authentic cooking techniques and products suitable for meat and meat-free dishes appeal widely**

Figure 11: Concepts of interest in world cuisine products, 2022

- Suitability for flexitarian diets needs to be called out more across the board**

Figure 12: Attributes associated with selected world cuisines, 2022

ISSUES AND INSIGHTS

- At-home lunches offer world cuisines opportunities to expand usage occasions**
- Familiar dishes with a twist provide 'stepping stone' to further exploration of world cuisines**
- Considerable interest in products that are suitable with both meat and meat-free dishes**
- Spelling out flavour profile appeals to a quarter**

MARKET SIZE AND PERFORMANCE

- World cuisine market's sales level out as COVID-19 boost fades**

Figure 13: UK retail value and volume sales of world cuisine food, 2016-21

MARKET FORECAST

- The five-year outlook for world cuisines**
Figure 14: Category outlook, 2022-27
- Income squeeze will continue to support world cuisines market**
- Competition from foodservice will regain momentum in 2024**

Figure 15: Market forecast for retail value sales of world cuisine foods, 2016-26

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

Market drivers and assumptions

Figure 16: Key drivers affecting Mintel’s market forecast, 2016-26

Forecast methodology

MARKET SEGMENTATION

Ready meals see reversal of fortunes in 2021

Figure 17: UK retail value sales of world cuisine foods, by format, 2019-21

Less established cuisines continue to grow as their established rivals struggle

Figure 18: UK retail value sales of world cuisine foods, by cuisine and format, 2019-21

MARKET DRIVERS

- **Increased focus on health shows no sign of abating**
- **HFSS volume price regulations delayed until October 2023**
- **Restrictions on advertising could also hit visibility of world cuisine ready meals**
- **On-pack nutrition label consultation proposed**
- **Mandatory calorie labelling in foodservice could boost appeal of world cuisine products**
- **2024 salt reduction targets still in place**
- **Long-term increase in cooking from scratch predicted...**
- **...and sustainability**
- **Growing flexitarian trend points to need for continued vegetarian and plant-based innovation**
- **Inflationary pressures squeezing household incomes**
- **World cuisine ready meals could win some usage occasions as well as lose some**
- **High inflation will support value sales in 2022**

Figure 19: UK retail value sales of world foods, 2008-12

Take-up of world cuisines should increase as younger demographics age

Figure 20: Trends in UK population, by age, 2016-21 and 2021-26

MARKET SHARE

- **Own-label continues to dominate world cuisine market**
- **Patak’s sales drop below pre-COVID levels in Indian segment...**
- **...as Charlie Bigham’s continues to build on pandemic gains**

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.

Buy this report now

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

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

Figure 21: Leading brands in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

- **Blue Dragon leads in a declining Chinese segment**

Figure 22: Leading brands in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

- **Top brands feel the pressure as Mexican segment suffers in 2021**

Figure 23: Leading brands in the Mexican ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

- **Reopening of foodservice establishments sees Nando's impressive retail growth stagnate**

LAUNCH ACTIVITY AND INNOVATION

- **Major world cuisine players launch plant-based ranges**
- **Patak's launches range of plant-based cooking sauces and meal kits**

Figure 24: Patak's Plant Based Biryani meal kit calling out being tailored to vegetables, 2021

- **Sharwood's and Veetee also explore plant-based trend**

Figure 25: New plant-based launches from Sharwood's and Veetee, 2021

- **Foodservice brands continue to infiltrate the retail space**

Figure 26: Recent examples of foodservice brands' launches in world cuisine retail space, 2021

- **Aldi looks to mimic Nando's and Wagamama experience**
- **Meal kits continue to see NPD...**

Figure 27: Recent innovation in meal kits, 2021

- **...whilst pastes and seasonings also branch out into less explored cuisines**

Figure 28: Recent innovation in pastes and seasonings, 2021-22

- **Handful of brands explore alternatives to plastic packaging**

Figure 29: Merchant Gourmet Plant Jars, 2021

- **Uncle Ben's rebrands to Ben's Original**

- **Nestlé introduces Mezeast range**

Figure 30: Nestlé introduces new Middle Eastern range, 2021

- **Established plant-based brands explore world cuisine market...**

- **...whilst Princes launches a plant-based disruptor brand**

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.

Buy this report now

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

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

Figure 31: New plant-based brands enter world cuisine market, 2021-22

ADVERTISING AND MARKETING ACTIVITY

- **Adspend by leading world cuisine brands doubles in 2021**
Figure 32: Total above-the-line, online display and direct mail advertising expenditure for selected world cuisine brands, 2020 and 2021 (sorted by 2021)
- **Sharwood’s launches first TV campaign in more than five years**
- **Blue Dragon continues to support range with ‘Find Your Dragon’ adverts**
- **Kikkoman encourages people to ‘Cook it up with Kikkoman’...**
- **...before launching a campaign to coincide with Chinese New Year**
- **Patak’s launches new TV ad focusing on its heritage**
- **Marketing support starts for new Plant Based range**
- **Old El Paso continues to focus on Tortilla Pockets**
- **Nielsen Ad Intel coverage**

USAGE OF WORLD CUISINES AT HOME

- **World cuisines continue to enjoy almost universal usage**
Figure 33: World cuisines eaten at home in the last three months and interest in eating world cuisines in future, by cuisine, 2022
- **Younger demographics demonstrate higher usage frequency...**
Figure 34: Eating of Indian and Chinese cuisines at least once a week, by age, 2022
- **...and continue to expand their repertoires**
Figure 35: Repertoire of types of world cuisines eaten, by age, 2022

WORLD CUISINE PRODUCTS EATEN OR USED AT HOME

- **Usage of all world cuisine products remains steady**
Figure 36: Types of world cuisine products eaten or used in the last three months, 2019-22

PROMPTS FOR TRYING A NEW WORLD CUISINE DISH AT HOME

- **Familiar techniques can prompt experimentation**
Figure 37: Prompts for trying a new world cuisine dish at home, 2022

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

- **Spotlighting familiar techniques through marketing can lower barriers to trial**
- **Step-by-step pictures can also help to reassure**
Figure 38: US examples of retail meal kits providing pictures of recipe stages, 2021
Figure 39: U:Me Spice Shots providing QR code for detailed usage suggestions, 2021
- **Spelling out the flavour profile appeals to a quarter**
Figure 40: Recent examples of products using spice ratings and detailing spices and herbs in them, 2021-22
- **The Spice Tailor and Patak's can offer cues on communicating flavour profiles...**
Figure 41: Recent examples of world cuisine meal kits providing more in-depth description of flavour profile, 2021
- **...as can alcohol brands**
Figure 42: Recent examples of alcohol brands communicating flavour profile, 2021

BEHAVIOURS RELATED TO WORLD CUISINES

- **At-home lunch occasion holds significant opportunities for world cuisine brands**
Figure 43: Behaviours related to world cuisines, 2022
- **Calling out suitability for lunch is currently rare**
Figure 44: Recent examples of world cuisine products calling out suitability for lunch, 2021
- **NPD should respond to consumer priorities for at-home lunches**
Figure 45: John West Steam Pot calls out short cooking times and suitability for lunch, 2021
- **Supermarkets can look to highlighting lunch potential in-store**
- **Familiar dishes with a twist are a starting point for further exploration for nearly half**
- **Brands in savoury snacks, pizzas and pies can tap into strong openness to new flavours**
Figure 46: Recent examples of savoury snacks, sandwiches and crisps exploring less well-established cuisines, 2021
- **Grocers should look to cross-category approach to introduce new flavour trends**

CONCEPTS OF INTEREST IN WORLD CUISINE PRODUCTS

- **Help on authentic cooking techniques appeals to 42%**

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

Figure 47: Concepts of interest in world cuisine products, 2022

- **Meal kits can look to appeal by making their processes more prominent**

Figure 48: The Spice Tailor by Anjum Anand Thai Massaman Curry, 2022

- **Meal kits can position themselves as an educational leisure activity**
- **39% interested in products suitable for meat and meat-free dishes**
- **Make suitability for usage for meat and meat-free dishes easier to find on-pack**

Figure 49: Recent example of a meal kit making suitability for meat and meat-free dishes prominent, 2021

- **Interest in products labelled as 'plant-based' highest amongst younger demographics**

Figure 50: Recent examples of world cuisine products making 'plant-based' central to their proposition, 2021

- **Ideas to make dishes healthier appeal to a third**
- **Meal kits, pastes and cooking sauces can align with health focus with tips on upping veg content**

ATTRIBUTES ASSOCIATED WITH SELECTED WORLD CUISINES

- **Suitability for flexitarian diets needs to be called out more across the board**

Figure 51: Attributes associated with selected world cuisines, 2022

- **Positive perceptions of world cuisines linked to evenings in will serve brands well during income squeeze**

Figure 52: M&S Family Dine In deal highlights suitability of Tex-Mex for evening in, 2022

- **Family connotations also relevant here**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – MARKET SEGMENTATION

Figure 53: UK retail value sales of world cuisine foods, by cuisine, 2019–21

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.

Buy this report now

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: £2195 | \$2995 | €2600

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

APPENDIX – MARKET SHARE

Figure 54: Leading manufacturers in the Indian ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

Figure 55: Leading manufacturers in the Chinese ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

Figure 56: Leading manufacturers in the Mexican ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

Figure 57: Leading brands in the Other international ready meals, cooking sauces and accompaniments/ingredients market, by value, 2020 and 2021

APPENDIX – FORECAST METHODOLOGY

- Market forecast and prediction intervals**

Figure 58: Market forecast and prediction intervals for UK value sales of world cuisines, 2021-26

- Market drivers and assumptions**

Figure 59: Key drivers affecting Mintel’s market forecast, 2016-26

- Forecast 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.

Buy this report now

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](https://www.mintel.com)**.