

### February 2014

#### Coffee - Ireland

“Coffee’s appeal as part of a morning routine, as a ‘pick-me-up’ or as a treat amongst Irish consumers, is likely to see the category continue to perform well in the coming years. In order to drive growth within the market, brands should look to engage in NPD (New Product Development ...

#### Carbonated Beverages - Ireland

“Moving forward the key challenge faced by the carbonated beverages industry will be meeting the expectations of health-conscious consumers, as many still associate carbonates with being unhealthy. Looking forward, it is likely that the market will see a strong level of innovation in the diet category, with more products claiming ...

### January 2014

#### Milk and Cream - Ireland

“Liquid milk remains a staple in Irish diets with the market forecast to achieve steady growth in the years ahead until 2018. In order to help drive growth further within the market and to keep consumers engaged with milk and cream, packaging, flavour and functional innovations should be explored.”

### December 2013

#### Coffee Houses and Donut Shops - US

“Coffee houses and donut shops have pushed to become lifestyle brands so they can remain relevant through the day and cater to the changing needs of consumers. With coffee houses and donut shops continually adding food items and diversifying their beverage programs, it is increasingly important for them to differentiate ...

#### Gum, Mints and Breath Fresheners - US

“The vast majority of category participants turn to its offerings for breath freshening, and half of users do so to get a bad taste out of their mouth. This is a strong indication that product marketing would do well to promote the ability of products to meet these primary needs ...

#### Cooking Sauces, Marinades and Dressings - US

“While significant percentages of respondents report that healthful product claims can persuade them to choose one brand of cooking sauce, marinade, dry seasoning mix, or dressing over another, they may not always sacrifice flavor for healthfulness, suggesting that BFY brands should emphasize taste over health claims when marketing.”

#### Beer - US

“Undoubtedly, the biggest competitive threat to beer brands is the likelihood that drinkers will opt for wine or spirits instead of beer. This presents beer brands with a challenge to attract drinkers who may otherwise select a different type of alcohol. Doing so will, in part, entail taking a few ...

#### Vitamins, Minerals and Supplements - US

#### Sugar and Gum Confectionery - UK

## Food and Drink - International

“While vitamin sales are robust, there are a few factors that could contribute to a decline in the category. As consumers continue to eat a healthier diet, the need for a separate supplement could be eliminated. Additionally, negative press about the quality and necessity of vitamins could erode usage and ...

“There is likely to be significant rewards for players in the sugar confectionery market who tick the boxes in terms of both taste and health. As well as appealing to health-conscious consumers, this would also help brands to proactively stay ahead of the ‘state stick’ and boost their reputations as ...

### Table Sauces and Seasonings - UK

“Through adding premium ingredients or repositioning products as a gourmet alternative, table sauce and seasonings operators are looking to attract consumers looking to upscale at least a part of their dining experience. Such innovation should be well placed to chime with the ongoing rise in consumer confidence and to tap ...

### Pizza and Pasta Restaurants - UK

“Linking pizza/pasta restaurant/takeaway brands to other lifestyle elements such as music, sport or gaming, which are popular with particular consumer groups, can also be an effective method in fostering a greater sense of brand loyalty amongst diners.”

### Private Label Beverages - US

“Stiff competition from global beverage companies means retailers have to work very hard to compete in the private label beverage category. Addressing the needs of key demographic groups, offering products that meet consumer needs for value, quality, and more, as well as playing on the inherent advantages of being a ...

### Cooking Sauces, Pasta Sauces and Stocks - UK

“Slow-simmered pasta sauces offer another potential means of supporting growth in the Italian sector, as 28% of users state they would pay more for these, despite them being largely absent in the UK market. This slow-cooking method for pasta sauce has connotations of authentic cooking, and is well-placed to appeal ...

### Condiments - US

“Competition from away-from-home dining, coupled with consumer health concerns, can potentially hinder future condiment category growth. However, the increasingly blurred lines between condiments, cooking sauces, and dressings present an opportunity for product development, flavor innovation, and the marketing of expanded usage occasions.”

### Beer - UK

“The market is having greater success with the newer range of sweeter flavoured/alcoholic ginger beers which are typically positioned as gender-neutral and which are equally likely to be drunk by men and women. These continue to offer a route for beer brands to increase usage and make beer more ...

### Ready Meals - Ireland

“The ready meal market is expected to experience steady growth in the years ahead until 2018, boosted mainly by its convenience status amongst time-scarce consumers. In order to drive the category forward, brands should look to enhance the nutritional credentials of meals and adopt a more transparent approach to the ...

### Chocolate Confectionery - Ireland

“The recent ban on advertising of foods that are high in fat, salt and sugar during children’s TV programming in RoI will negatively impact how the producers of chocolate confectionery promote to the key children’s market. As such, chocolate companies need to consider including healthier ingredients, such as stevia or ...

## November 2013

### Sandwiches and Lunchtime Foods - UK

### Supermarkets: More Than Just Food Retailing - UK

## Food and Drink - International

“As consumers age and leave employment, the convenience factor of out-of-home sandwiches and lunch products has less resonance, meaning that they are less likely to perceive them to be value-for-money purchases. Operators therefore need additional hooks to ensure they are not seen as overpriced.”

### White Spirits - US

“Vodka easily dominates the surveyed white spirit and RTD segments, both in volume sales and reported consumption. However, consumers are no longer loyal to one alcoholic beverage or another. Emphasis on craftsmanship, quality, and almost limitless flavor innovation should be leveraged by rum, tequila, gin, and RTD segments to bring ...

### Dieting Trends - UK

“Clear like-for-like comparisons between diet products and their non-diet alternatives should allow brands to show consumers that there are genuine and tangible differences in the calorie/fat/sugar content, and highlight where these owe to healthier recipes rather than simply smaller portions.”

### The Private Label Food Consumer - US

“A slowly recovering economy and lingering perceptions of inferior quality are inhibiting sales growth. Retailers will need to address these issues and others through innovation in products and positioning.”

### Juice and Juice Drinks - US

“While the category benefits from a health halo, the perception of high calories and sugar has stunted recent growth. More and more, health professionals are pointing to the dangers of juice consumption and encouraging moderation (or elimination), especially among children.”

### Poultry - US

“Fears related to the safety of poultry, due in part to recent foodborne illnesses, have consumers on high alert. Additionally, health concerns related to high cholesterol and fat intake from consuming meat has Americans seeking alternate protein options. To calm

“If retailers respond to the changing retail environment, the decline in usage of large out-of-town stores can be reversed.”

### Pizza Restaurants - US

The pizza consumer is changing as people look to healthier, more upscale, and on-the-go dining experiences. We have seen many fast casual pizza restaurant chains spring up in the past year and consumers are moving toward gourmet-like flavor and ingredient combinations. However, with the weak economy, some consumers are still ...

### Fruit Juice, Juice Drinks and Smoothies - UK

“A focus around energy provision should create standout in the market. Such propositions remain rare, however, this is an area the under-35s show above-average interest in.”

### Private Label Food and Drink - UK

“Tesco’s October 2013 relaunch of its premium tier Finest range should provide a boost to premium own-label NPD. Such innovation should be well placed to chime with the ongoing rise in consumer confidence and to tap into the predicted increase in consumer spending.”

### White Spirits and RTDs - UK

“Brands at the premium tier in particular should tread carefully when experimenting with flavour as it risks masking the ‘pure’ flavour of the drink, something which is so important for premium spirits.”

### Soup - Ireland

“The RoI soup market experienced a decline in sales since 2008, with 2012 marking the first year of recovery. The NI market proved to be less volatile with year-on-year sales mainly increasing. Both markets are forecast

these fears, manufacturers must focus on implementing transparent manufacturing and ...

## October 2013

### Family Midscale Restaurants - US

“Family restaurants face increasing competition from fast food and fast casual chains, which offer value based on low prices, convenience, and easily customizable options. More modern ambiance through restaurant renovations and redesigns, convenient breakfast items, and showing value by offering more BFY foods at budget-conscious prices are the ways forward ...

### Fast Casual Restaurants - US

“Due to consumers’ budgets still being constrained, fast casual restaurants must find a way to provide more value in order to justify higher prices. This value proposition includes quality items and upscale yet casual experience at an affordable price. Corporate responsibility initiatives will play an increasingly important role, as will ...

### Wine - US

“Young category participants are more likely than average to turn to recommendations from friends, store employees, and advertisements in their wine purchase decision. This group also turns to indicators such as label design at a higher-than-average rate and latches onto familiar characteristics such as an interest in natural products.”

### Organic Food and Drink - UK

“It is important for organic brands to communicate to shoppers in a more effective way the tangible, concrete benefits their products offer them. Given the vast amount of product information that is already competing for shoppers’ attention, clear, dynamic labels that can be understood at a glance are needed.”

### Cooking Enthusiasts - US

“While many Americans cook at home, they come to the table with different skill sets and motivations for doing so. Marketers should acknowledge that each Cooking Enthusiast has her own approach to meal preparation

## Food and Drink - International

growth until 2018; however, innovations in health, flavour and convenience are needed to drive ...

### Meat, Seafood and Poultry - UK

“Ready to cook products with sauces or flavourings have been a key NPD area in chilled fish. Such innovation should be well-placed to help also the other segments to appeal to the majority of users looking for easy to prepare products and tap into popular flavour trends.”

### Coffee Shops - UK

“Trends in the retail market demonstrate operators’ attempts to foster a greater sense of emotional connection between consumer and coffee producer in order to gain market share. Coffee shop operators could do well to apply this principle to the out-of-home environment as well seeing as 22% of out-of-home hot drink ...

### Fruit and Vegetables - US

“Increasing consumer interest in healthy and natural foods should help drive fruit and vegetable sales but a growing local foods movement and the existence of a variety of tastier healthy alternatives present challenges for the stagnant market.”

### Fruit and Vegetables - UK

“In addition to price being a barrier for the five-a-day message, consumers may simply be unaware of what constitutes the RDA. One in five adults note that it is sometimes hard to know which foods count towards their five-a-day, rising to a sizeable 26% of 16-24s, which is a concern ...

### Cheese - UK

“Innovation in terms of formats tailored for snacking and convenient packaging will be key to drive cheese’s appeal as a snack and encourage impulse consumption.”

## Food and Drink - International

and give her opportunities to customize recipes and use resources that make cooking the easiest and ...

### Cheese - US

“Growing concerns about the poor nutritional profile of processed cheese can be neutralized by emphasizing the positive benefits of cheese consumption. There is an opportunity for manufacturers to market the high-protein content of a variety of cheeses, as well as their versatile flavors, origins, and greater retail availability.”

### Dark Spirits - US

“Despite its recent success, the dark spirits category still faces obstacles to becoming more commonplace in consumers’ alcohol routines. Flavor innovation and new products have piqued the interest of some adults of legal drinking age, but ongoing sales are dependent on consumer loyalty, not just product trial. Manufacturers must emphasize ...

### Attitudes To Food - Ireland

“With the economy showing slow signs of recovery, it is likely that consumers will continue to be driven by price when shopping for groceries. With home cooking and baking enjoying somewhat of a renaissance, and the structure of the population expected to change, opportunities exist for brands to develop and ...

## September 2013

### Red Meat - US

“The red meat category is facing decreased interest from consumers in light of growing concerns over health and price. Yet the market still has opportunities to infuse some excitement into the category with premium positioning, new cuts of meat, value-added products, and new packaging.”

### Bread and Baked Goods - UK

“While consumers’ demand for variety highlights the potential for brands to benefit from continuing to develop their alternative baked goods offering, it represents a call to action for manufacturers not yet active in this segment to move into it.”

### Fish and Seafood - US

“Perhaps the biggest threat to retail sales of fish and seafood comes from restaurants that serve these items, suggesting that brands and retailers must do more to approximate the recipes and dishes restaurants serve to best challenge competition from restaurants.”

### Cordials and Squashes - UK

“Health should be near the forefront of producers’ strategies, appealing to not only health-conscious adults but also those looking for suitable soft drinks for their families.”

### Meat-free and Free-from Foods - UK

“A key weakness for the meat-free market is that over half of adults note that meat substitutes lack flavour. A potential solution lies in adapting the recipes of these lines as a large minority of adults note a keenness to try meat substitute pieces containing herbs/spices with agreement rising ...

### Contract Catering - UK

“Menu innovation represents a key opportunity for operators to bolster sales in the higher education sector where a fifth of students currently state that they avoid or limit their use of catering on campus as the current food choices are too boring.”

## Food and Drink - International

### Still, Sparkling and Fortified Wine - UK

“Rather than trying to compete with standard strength wines, the lower-alcohol category may be better placed to promote its accessibility to younger consumers and target drinking occasions which have driven growth in categories such as cider.”

### Bread - US

“Some 81% of bread users utilize products in the category as part of a sandwich or wrap, this is more than double that of any other use. The industry should play to its strengths, expanding offerings that allow for sandwich experimentation. At the same time, introducing new formats and flavors ...

### Food Trucks - US

“Food trucks must face many barriers in order to break through and find success. These include overcoming a lack of physical location, meeting governmental regulations, finding a way to achieve operational efficiencies, and meeting the needs of mobile consumers. While some food truck operators have found unique ways to solve ...

### Coffee - US

“Variety has fueled growth and led to a boost in sales for coffee manufacturers. However, Mintel research finds that many new products have yet to interrupt consumers’ everyday coffee rituals, namely, a cup of roasted ground coffee prepared in a standard drip coffee maker. Manufacturers must find ways to introduce ...

### Yogurt - Ireland

“With the market for functional dairy products among elderly consumers well established, and the overall value of the Irish yogurt industry showing only modest growth, the producers of yogurt could consider targeting the underdeveloped segment of consumers aged 0-17 with functional products suited to their needs to increase their consumption ...

### Sugar and Sweeteners - US

“Fears about the safety of some sweeteners continue to plague the sugar substitute segment, suggesting that synthetic sweetener brands still have more to do to settle concerns about potential negative side effects. Ads that transparently chronicle the origins of these products, their ingredients, and how they are produced may help ...

### Yellow Fats and Edible Oils - UK

“Innovation around yellow fats with added benefits has the potential to add value to the market, with more than a third of consumers agreeing that it is worth paying more for butter/spread with health claims. Butter/spread which is good for bones would appeal to households with children, suggesting ...

### Vitamins and Supplements - UK

“Although the market has seen growth in value in 2012 driven by special offers and promotions, people are not experimenting and special offers may be hindering overall growth in the category. Different approaches in special offers, for example bundling discounted vitamins with products in other categories, could encourage experimentation. Legislative ...

### Gluten-free Foods - US

“The gluten-free food category will continue to grow as an increasing number of manufacturers develop better-tasting and more nutritious gluten-free foods. Category appeal beyond those with celiac disease, coupled with a new FDA ruling for gluten-free product labeling, suggests the category will grow out of its marker as just another ...



## Food and Drink - International

### Quick Service Restaurants - US

“Operators are struggling with the need to provide low prices at a time when commodity costs are quickly increasing. Quick service restaurants must wean consumers off the idea of price and provide extra value in order to justify increases. Since many customers are beginning to seek a more upscale and ...

### Casual Dining Restaurants - US

“The budget-conscious consumer is still searching for deals, and casual dining operators are battling the perception that fast casual and fast food restaurants can do a better job of delivering on this. To become more competitive, casual dining operators realize they must highlight their own brand of full-meal deals, as ...

### Obesity - US

“Despite consumers’ interest in eating healthier, they also want food that tastes good. While government, food manufacturers, and restaurants try to provide healthier options to Americans, these organizations are up against several challenges, especially regarding how to market healthy items.”

### Dark Spirits and Liqueurs - UK

“While modern spins on whisky are likely to be shunned for drinks such as single malt by older drinkers, producers would be unwise to ignore the growing influence of appealing to younger tastes.”

### Dollar and Discount Store Retailing - US

“While dollar and discount stores benefited from increased consumer traffic and a new shopper base as a result of the recession, these channels will have to work hard to retain these shoppers as the economy improves. Everyday essentials are key to dollar stores’ strength, while affordable fashion will help discount ...

### Coffee - UK

### Burger and Chicken Restaurants - UK

“Creating more differentiated branding can be difficult to achieve based on factors such as price and convenience which are now so standardised across the market. Promoting an image of providing ‘real’ fast food through techniques such as the use of more natural materials in their venue design and more real ...

### Baking and Dessert Mixes - US

“The message of time savings should be prioritized in product promotion. Some 48% of category participants say they use baking and dessert mixes in order to save time. In addition to comparing these mixes to products baked from scratch, highlighting the convenience of having products on-hand for preparation that requires ...

### Home Baking - UK

“Home baking brands can target older shoppers more effectively by leveraging the transparency, ‘purity’ and naturalness of baking from scratch in their marketing campaigns amid the heightened concerns held among the older generation concerning the artificial additives and ingredients in shop-bought prepared food.”

### Breakfast Cereals - US

“Manufacturers should continue to develop products that meet consumer demand for wholesome and portable offerings in an effort to revitalize stagnant cereal sales. A new focus on adults, following decades of appealing to younger consumers, is now needed to revitalize the category.”

### Yogurt and Yogurt Drinks - US

“Price and health are two areas providing major opportunities for marketers. The rise of Greek yogurt has defined the industry during the past several years. Consumers have been more than willing to pay a premium for Greek yogurt, although there are early signs that they are beginning to seek more ...

### Butter, Margarine and Oils - US



## Food and Drink - International

“Most pertinently for the coffee pods segment will be convincing consumers that the products deliver better quality than instant coffee. This suggests that the coffee pods segment needs to convince the wider population that the price premium of coffee pods is justified, eg through promoting the lack of wastage, increased ...

“Health and wellness trends and recent price increases have presented the category with challenges that will need to be addressed with innovative new products and marketing if the brands hope to grow.”

### Breakfast Cereals - UK

“Considering the widespread associations of protein and building muscle, protein-focused recipes could also help to boost usage of cereals before or after exercising, with usage on these occasions so far remaining niche.”

### Energy Drinks - US

“Current energy drink, shot, and mix users have been affected by the scrutiny regarding the safety and health effects of the category. Educational outreach is necessary to help current users feel confident that their choice of energy drink, shot, or mix has no adverse effects. Informative marketing also could broaden ...

## July 2013

### Kids and Dining Out - US

“Children are shifting in the way they use restaurants. They are ordering from many different areas of the menus, in part because of parental health concerns as well as a lack of sophisticated options. The meal toy traditionally drew in kids, but children are becoming increasingly sophisticated and aging out ...

### Yogurt and Desserts - UK

“There is scope for more brands to expand their offering of single-serve desserts, particularly within the frozen aisle. Over three in ten over-55s would like to see more frozen desserts which are individually portioned, and these also appeal most to those living in single-person households – both rapidly growing demographics ...

### Eating Out: The Decision Making Process - UK

“Product innovation is a key strategy to ensure that eating out operators do not lose further share of the ‘leisure pound’ by putting the excitement back into what is essentially a leisure experience.”

### Healthy Dining Trends - US

“In June 2013, the American Medical Association recognized obesity as a disease, a change that makes the need for healthful restaurant options more vital than ever. Diners still see dining out as time to indulge, which means the foodservice industry needs to do more to hit both menu marks to ...

### Ice Cream and Frozen Novelties - US

“Personal use of ice cream and frozen novelties is highest among respondents over the age of 65 and among respondents aged 18-24. This is a strength of the category, given that these population groups are some of the fastest growing. However, the range of users necessitates targeted marketing efforts that ...

### Tea and RTD Teas - US

“The rise in tea’s popularity in the U.S. has opened the market for manufacturers to emphasize the natural taste of tea, range of tea types, and various preparation options. Through education, manufacturers have the potential to elevate tea to the level of other premium beverages, such as coffee, that ...

### Sports and Energy Drinks - UK

“Building associations between energy drinks and everyday situations such as work and commuting, rather

### Drinking Out of the Home - UK

“With the price of drinking out of home consistently rising, the pressure is on landlords to keep pace with



## Food and Drink - International

than extreme lifestyles, could help to increase the relevancy of energy drinks among current non-users.”

### Pizza at Retail - US

“The biggest competition for frozen pizza brands is consumers’ return to restaurant pizza as spending power revives alongside the recovering economy. Frozen brands must work harder to improve the quality of their products so that they can better compete with restaurant pizza. Doing so will require improving recipes, variety, and ...

### Pizza - UK

“Ham and beef toppings which are flagged up as originating from British producers, with details about the farm on pack, would help consumers trust the quality of the meats considering that around half of adults note that seeing British ingredients and manufacturers’ details on labelling would help them trust a ...

### Foodservice - Ireland

“The IoI foodservice market has experienced turbulent times since the onset of the economic downturn in 2008 when the market value declined by €1bn between 2008 and 2010. However, shoots of hope are emerging, with modest growth predicted in the coming years across the industry. Standout sectors have been identified ...

## June 2013

### Eating Out Review - UK

“A renewed focus on the basic principle of emphasising the ‘experience’ of eating out should help operators reclaim market share, particularly in sectors such as pizza/pasta restaurants where brand loyalty is low due to an extended period of heavy discounting.”

### Lunch Meat - US

“The lunch meat category enjoys high household penetration rates but is now grappling with the challenge of decreasing personal usage due to consumer price and health concerns.”

consumers’ increasing expectations of the pub experience.”

### Food Packaging Trends - US

“Consumers are looking to get more and more out of their food packaging. Food companies will need to find innovative ways to cater to demand for convenient, transparent and environmentally responsible packaging while providing consumers with the utmost value.”

### Bread - Ireland

“The bread market has seen positive growth between 2008 and 2013, with bread being a household staple for many Irish households. Moving forward key challenges for the market will be dealing with increased costs of production, and demand for local sourcing of ingredients.”

### Wine - Ireland

“With aggregate new product launches declining, flavour innovations similar to those seen in the cider category provide the drinks companies serving the Irish wine industry with an opportunity to breathe fresh life into a declining market and create potentially lucrative new revenue streams.”

### Ice Cream - UK

“While the ice cream market continues to struggle, sales of frozen yogurt are soaring, with the segment benefiting from its naturally low-fat positioning. However, representing less than 1% of the total market, it remains fairly embryonic. This suggests there are lucrative opportunities for ice cream brands to grab a slice ...

### Grocery Pricing and Promotion - US

“Digital promotions represent the future of most industries, including the grocery retail trade. Effective digital promotions do much more than simply re-create the traditional coupon experience on a new platform.

## Food and Drink - International

Marketers are finding ways to digitally bring value to customers in extraordinary new ways. Adapting current technology can help grocers ...

### Tea and Other Hot Drinks - UK

“Tea enjoys a long-established role as a quintessentially British drink. Even today, the majority of consumers see tea drinking as part of being British, and report enjoying the ritual of drinking tea, offering a strong platform for communication around these issues.”

### Meat Alternatives - US

“Health perception plays a large role in use of meat alternatives. One third of consumers indicate using products in the category because they are healthy, higher than any other reason measured in the report (including the reduction of meat consumption).”

### Drinking in the Home - UK

“Lower-alcohol drinks tend to be cheaper, because of lower taxation, and are often lower calorie. Both factors should make them attractive to people drinking at home, helping to retain users at a time when people are cutting back on spend.”

### Beer - Ireland

“The Irish beer market has struggled through some trying times since the onset of the economic downturn, with the Irish on-trade bearing the brunt of the hardship. However, with a booming off-trade and growth of the craft beer segment, coupled with the possibility of government legislation working in the industry’s ...

### Meat - Ireland

“The meat market in Ireland has seen strong value growth year on year despite the downturn, and although the horsemeat scandal of 2013 is likely to have a lasting impact on sales of processed meat products, it has been to the overall advantage of sales of unprepared meat products, and ...

### Consumer Trust in Food - UK

“Nearly eight in ten adults consider the food industry to be too reliant on mass manufacturing. However, for mass-produced products, highlighting the involvement of humans – whether it’s a farmer, company owner or even the workers on the production line – on-pack or in other communications, can help to convey ...

### Trends in Snacking and Value Menus in Restaurants - US

“Consumers are shifting the way they use foodservice. Instead of large meals, they are tending to snack more. This is a reflection of the economy, as well as their focus on health concerns. Consumers are also using snacking as a way to socialize, choosing snacks rather than meals and sharing ...

### Carbonated Soft Drinks - US

“Carbonated soft drink manufacturers are faced with a challenging marketplace in which they are battling not only to retain current users who are being encouraged to make healthy choices, but also to regain consumers who have already sought out alternatives. Companies are hedging bets on multiple packaging sizes, flavor innovations ...

### Poultry - Ireland

“Chicken is dominating the poultry category at present due to its attractive price point and its versatility. However, the Irish poultry market faces challenges, with high levels of imported chicken dominating the market due to its lower wholesale price. Consumer desires for local poultry on retail shelves could prove challenging ...

May 2013

### Cakes and Cake Bars - UK

“Around one in four users would like to see more individual portions of cakes, suggesting the market could tap more effectively into the popular impulse occasions through single packs and greater visibility in impulse channel and aisles, effectively leveraged by cereal bars and breakfast biscuits.”

### Frozen Snacks - US

“The category finds favor through offerings that appear as fun food geared toward a younger audience, with pizza bites, spicy poppers, and bar food favorites rising to the top of brand offerings. The expansion of product lines beyond these ‘extreme’ items into more sophisticated, quality snacks with a higher health ...

### Prepared Meals - UK

“According to exclusive research for this report, two fifths of ready meal users do not plan to change their purchasing habits in the wake of the horse meat adulteration scandal. For the frozen ready meals segment, however, there has been a marked effect for implicated brands, while one in ten ...

### The NASFT State of the Industry Report – The Market - US

Mintel and the National Association for the Specialty Food Trade (NASFT) have collaborated to produce the tenth annual State of the Industry Report – The Market, following the first report published in May 2004. The purpose of this report is simply to show changes in the industry as a whole ...

### Alcohol Consumption at Home - US

“Alcohol consumption at home or someone else’s home has become more commonplace in the wake of the recession. However, the slow economic recovery has seen some consumers return to on-premise alcohol consumption, which is slated to continually lessen the sales lead maintained by off-premise channels. Thus, more should be done ...

## Food and Drink - International

### Carbonated Soft Drinks - UK

“A striking 41% of consumers who have bought soft drinks in the on-trade currently consider their quality as poor, and only one in three users are satisfied with the range available, highlighting that there remains unmet demand in terms of choice and quality of soft drinks in the on-premise market ...

### Pub Catering - UK

“Whilst increasing the ‘experiential’ element will help create a buzz around the dining/leisure occasion, operators should also be concentrating on improving engagement rates with consumers’ pre-/post-visit in order to increase the likelihood of turning diners into ‘brand ambassadors given the weight diners put on personal recommendation in venue ...

### Pub Visiting - UK

“With closures slowing, the now-streamlined pub industry is better placed to take control of its own fortunes and focus on its strengths rather than looking for people to blame for its recent problems.”

### Baby Food and Drink - US

“U.S. Census Bureau data show a 2.7% decline in population of children younger than five from 2008-13, signaling a shrinking market for baby food and drink. Innovative packaging and new formats that can make baby food and drink products appealing to babies longer will help counter losses in ...

### Frozen Meals - US

“One way to help increase usage of frozen meals is to better position them as convenient and affordable ways to try new types of cuisines. Only 21% of respondents say frozen meals are a good way to try new cuisine types, Mintel’s survey finds, suggesting untapped potential for introducing consumers ...

## Food and Drink - International

### Non-Alcoholic Beverages at Restaurants - US

“Consumer tastes have become more sophisticated, and they are increasingly searching for new specialty beverages that offer a unique experience. However, a greater focus on health aspects of sugary beverages and their link to obesity is affecting the market and causing shifts in menuing and the promotion of beverages.”

April 2013

### Hotel Catering - UK

“Over a quarter of consumers think that hotel restaurants are too formal and that they lack character/ atmosphere. The onus is therefore on operators to inject fun and personality into their brand positioning and venue design.”

### Dairy Drinks, Milk and Cream - UK

“With three in ten users saying they rarely cook recipes that involve cream, communicating the versatility of cream as a cooking ingredient, such as with on-pack recipes, has scope to encourage usage. Year-round flavour innovation has scope to appeal to a small proportion of cream users.”

### Soup - US

“Soup finds its largest draw among consumers aged 45+. This is a strength of the category, given the hefty purchasing power of Baby Boomers who make up a large percentage of this group. However, growing consumption among young consumers will be important in maximizing sales and nurturing a loyal user ...

### Hot Dogs and Sausages - US

“A third of respondents to Mintel’s survey say they would eat more hot dogs and sausages if they were more nutritious. This presents brands with an opportunity to add value to their products by incorporating nutritious elements such as vitamins, minerals, fiber, or some other type of nutritious ingredient.”

### Baby Food and Drink - UK

“Critically, only 30% of parents trust organic baby food over non-organic, suggesting the label is not doing enough to justify a price premium. Furthermore, agreement falls to 24% of parents with a youngest child aged under six months, suggesting that failure to win over these young parents could hinder future ...

### Convenience Stores - UK

“Investment by major retailers in the extension of their convenience store portfolios and improvements in the proposition are factors in bringing consumers into convenience shopping. Further consolidation will hit weaker retailers, notably independents, but it looks likely to have a positive impact for the consumer and the sector.”

### Dairy and Non-Dairy Milk - US

“Milk is most associated with at-home breakfast or as an additive to cereal or coffee, but the growing variety of milk products invites expansion beyond these traditional usage occasions. Milk producers should embrace their product’s versatility by encouraging consumers to use milk in recipes, as a snack, or as a ...

### Chocolate Confectionery - US

“Increased concerns over obesity and related diseases as well as product price increases have caused some consumers to become weary of purchasing chocolate. The chocolate industry must address these challenges with products, packaging and marketing that addresses consumer concerns and invigorates consumer interest in the category.”

### Soup - UK

“Despite soup already benefiting from a healthy image, there are opportunities to further mine the health angle given that the majority of users would like to see more soups boasting added-health claims. There is scope for operators to look beyond the traditional ‘low/no/ reduced’ claims and vegetable content, for ...

## Food and Drink - International

### The Dining Out Experience - US

“Creating a great experience goes far beyond the menu. It can include such aspects as décor, service, technology, customization, and the incorporation of deals. Each operator must find the right balance that meets the needs of their brand, their core consumers, and the segment they occupy. Experimenting with strategies that ...

### Convenience Store Foodservice - US

“While convenience stores have offered prepared foods for years, the trend has accelerated in the past five years, and the scope of c-store foodservice has broadened. Convenience stores are successfully capturing on-the-go dining occasions through ubiquitous presence, quick in/out accessibility, and the benefit of one-stop shopping with fuel purchase ...

### Cereals - Ireland

“The cereal market in Ireland has gone from strength to strength in the last few years, with its positioning as an easy-to-prepare and nutritious breakfast helping to sustain market growth. However, associations of some cereal types with childhood obesity represent a key challenge for the market, and moving forward we ...

## March 2013

### Cookies and Cookie Bars - US

“Consumers are paying more attention to their health due to a rising level of awareness regarding the poor nutritional state of our nation, most specifically among children. As consumers more actively engage with their need to eat healthy, the cookie market finds itself in a risky position; cookies, even so-called ...

### Ethnic Restaurants and Takeaways - UK

“Operators looking to leverage consumers’ significant interest in niche cuisine types such as Malaysian, South American, Caribbean, Indonesian and North African should ensure that they are offering clear advice and

### Attitudes towards Pricing and Promotions in Food and Drink - UK

“The potential danger entailed by supermarkets purely focusing on price is that consumers could develop a level of apathy towards such pricing strategies. More than a third of consumers agree that ‘Price matching removes the need to think about price when grocery shopping’, indicating that price matching no longer serves ...

### Chocolate Confectionery - UK

“Using more unusual flavour combinations in bars may appeal to the 28% of users who like trying chocolate with exciting flavours. Chilli flavours are now fairly commonplace in premium block and boxed chocolates and could add an exciting twist to bars, as could a hint of sea salt in a ...

### Cereal, Energy and Snack Bars - UK

“Despite high promotional activity, the market continues to struggle with a weak value perception. Marketing initiatives that focus around the quality and nutritional benefits of the bars may therefore offer the most potential for operators to enhance the category’s value image.”

### Pasta, Rice and Noodles - UK

“Although pasta and rice dishes are well known for their accessibility to even the most novice cooks, judging how much to cook is a widespread problem, affecting over four in ten consumers. There is scope for the boil-in-the-

## Food and Drink - International

assistance to consumers as to what the cuisine type is, how they should order it and when they should visit ...

bag concept to be introduced into the UK pasta market, having gained traction ...

### Biscuits, Cookies and Crackers - UK

“While users tend to turn to biscuits when they feel like a treat, half say it’s important to pay attention to the calorie content of biscuits while half would like to see more biscuits with added health benefits.”

### Food and Drink Retailing - UK

“Fortunately, horse meat is not poisonous – unlike the adulteration of olive oil scandal, which hit southern Europe a couple of decades ago. The issue is that trust in labelling has been seriously undermined because some, perhaps many, meat suppliers had been using cheaper product and then passing it off ...

### Nut-based Spreads and Sweet Spreads - US

“Four in 10 respondents to Mintel’s survey say they would be interested in gourmet nut and fruit spreads, but most gourmet producers are small brands with little to no advertising clout. Leading brands should spend more time and effort in the category, backed by established processing plants and bigger ad ...

### Online Grocery Retailing - UK

“Without a hike in delivery charges or perhaps substantially higher minimum order values, online retailing for multichannel grocers is never likely to yield margins comparable to store-based shopping. But we think retailers can focus marketing communications on higher socio-economic groups to help mitigate the inherent financial disadvantages of retailing online ...

### Cereal Bars and Snack Bars - US

“Lackluster product innovation and expanding bar options from competing categories have challenged cereal/snack bar sales. Attracting the attention of consumers away from competing offerings will require the cereal/snack bar category to both emphasize its inherent strengths and enhance nutritional/performance positioning.”

### Bottled Water - US

“Bottled water has been able to rebound from declines showcased during the worst of the economic downturn, but it still faces challenges, such as consumers being more likely to drink tap water than bottled water. However, bottled waters have been able to appeal based on taste, convenience, and value-added products ...

### Provenance in Food and Drink - UK

“The horse meat scandal, which broke in January 2013, has put the spotlight on the sourcing of food, with concerns raised over the way in which meat from overseas has entered the UK food chain.

While the food industry is likely to feel the effects for some time, consumers are ...

### In-store Bakeries - US

“A growing movement that calls for consumers to limit their intake of a number of key food ingredients, such as fat, sugar, sodium, and carbohydrates, thought to be harmful to one’s health, threatens in-store bakery sales as consumers feel pressure to cut back on indulgence. However, in-store bakeries have the ...

### American Families and Dining Out - US

“Today’s families seek a more casual dining experience than they have in the past. The stresses of the recession have made families more price conscious, and they also want dining experiences that are comfortable. Because

### Bottled Water - UK

“Features such as purity, low calorie content and sourcing/origins are all strengths for the bottled water market and operators should not marginalise these in their efforts to make water a more exciting and adventurous market.”

## Food and Drink - International

of the proliferation of options around foodservice ordering methods (to go, carry-out, drive-thru, and delivery ...

– **Chris Wisson, Senior Drinks Analyst**

### Pet Food - US

“According to the American Veterinary Medical Association (AVMA), pet ownership is on the decline since 2006. Due to a waning number of end users, marketers must consider ways to encourage pet food buyers to feed their pets a variety of new food/treats, tap into the underdeveloped elderly pet owner ...

### Cheese - Ireland

“Cheese is a staple product in Irish households. However, the category is suffering from an unsustainable level of promotional activity, which is being used to boost sales amidst increased prices. Future growth within the category will be dependent on increased usage and purchase frequency. Value-added products in both the snacking ...

## February 2013

### Sweet and Savoury Spreads - UK

“Concerns about health are a key factor inhibiting sweet spreads consumption, with two-fifths (39%) of users expressing concern about sugar content, whereas only one in eight has cut back their usage because of cost (13%). Yet only 6% of new products launched in 2012 made a low/no/reduced sugar ...

### The Food and Drink Shopping Experience - US

“Securing longstanding patronage will come from creating a sense of investment in the food and drink retailer brand. This can come from developing a two-way relationship with consumers, allowing shoppers to feel as if stores are catering to their specific shopping lists and providing affordable products that meet their individual ...

### Grocery Retailing - US

“The composition of primary grocery shoppers is skewed toward Baby Boomers and Gen Xers. Only half of Millennials take sole responsibility in grocery shopping, and this cohort is likely to look for an efficient shopping experience and instant gratification, more so than their older generational counterparts due to their high ...

### Dry Pasta, Rice, Noodles and Ancient Grains - US

“Manufacturers and retailers alike need to have a clear grasp on positioning, and a clear understanding of their consumers. Price still remains a smart strategy to take in this category, but consumers’ value proposition goes beyond price, involving quality, indulgence, and health as well.”

### On-premise Alcohol Consumption Trends - US

“When it comes to on-premise alcohol trends, the recessionary spending habits of consumers are continuing. These consumers are being deterred from purchase due to price, health, and fear of public intoxication. To draw out these consumers, operators must create the right balance of offerings that meet the specific needs of ...

### Breakfast Catering - UK

“Lifestyle branding is an increasingly prevalent tool in the eating out market as foodservice operators look to engage with consumers on additional levels than price and menu which are no longer the venue differentiators they once were.”

– **Helena Spicer – Senior Foodservice Analyst**

### Attitudes Toward Sodium - US

### Parents’ Attitudes Toward Kids’ and Teens’ Snacking - US



## Food and Drink - International

“Despite consumers’ interest in eating healthier, they also want food that tastes good. While government, food manufacturers and restaurants try to provide healthier options to Americans, these organizations are up against several challenges, especially regarding how to market low/no/reduced sodium items.”

“Consumers have a love-hate relationship with snacking. Snack foods provide convenient fuel for an increasingly busy populous and also may provide welcomed indulgence. But with so much media attention on the obesity epidemic, today’s consumer may feel more pressure to reduce snacking and eat more healthy snacks.”

### College and University Foodservice - US

“Successful university dining services of tomorrow will keep abreast of students’ opinions in terms of foods/flavors as well as the direction of their interest in issues like health and sustainability. They will engage students with the use of events and technology and use every opportunity to prove to students ...

### Consumer Attitudes towards Functional Food and Drink - UK

“While this greater regulation is intended to clarify the picture for consumers, as 58% of adults think that functional claims are exaggerated/misleading, it may in fact fail to do so in the short term, if brands continue to use consumer expectations of ingredients to their advantage.”

– Chris ...

### Pet Food and Supplies - UK

“Introducing more sophisticated recipes could also support value growth, considering one in five cat/dog owners agree there are not enough gourmet cat and dog foods...Taking cues from human food markets, such as using regionally sourced ingredients, traceability of meats or ethnic-style recipes, could translate into wet food for cats ...

### Food and Drink Packaging Trends - UK

“The food and drink industry suffers a bad reputation for excessive packaging, with most consumers deeming a lot of packaging to be superfluous. There is scope for manufacturers to overturn this negative perception by communicating to consumers the positive impact packaging can have on the environment by extending the shelf ...

### Beverage Packaging Trends - US

“Despite beverage companies’ dedication to innovative and intriguing packaging designs, consumers continue to prioritize price and familiar brands when beverage shopping. As the U.S. rebounds from the economic recession, limited-edition designs have an opportunity to seize newly regained disposable income, especially among Millennials. Interactivity also presents an opportunity, in ...

## January 2013

### Breakfast Restaurant Trends - US

*“There exists great potential for restaurants to ramp up sales during the weekday morning daypart, by understanding consumer needs and adapting their offerings. This means everything from menuing a good selection of both food and drink items to increasing*

### Salty Snacks - US

*“The importance of product price among salty snacks consumers is a reason for the success of store brands in the category. Some 86% of salty snacks consumers say price is an important factor in their purchase decisions,*

*service speeds and efficiencies and creating healthful and portable meal options ...*

## Dining Out: A 2013 Look Ahead - US

“Successful restaurants of tomorrow will evaluate current issues and events to see how they can grow with the culture, starting with taking some responsibility for consumers’ health. Successful restaurants’ menus will make room for diet sensitivities and present food that is as authentic and unprocessed as possible. They will be ...

## Crisps, Salty Snacks and Nuts - UK

“Another means of encouraging stronger usage among over-65s is by eradicating flavourings altogether. A substantial 41% of users aged over-65 agree that there are not enough unflavoured crisps compared with just 26% of users on average, suggesting the plain crisp offering should be expanded in stores beyond Walkers’ 90-year-old Smiths ...

## Nutritional Food and Drink - US

*“The blurring of lines between snack bars, cereal bars, performance bars and nutrition bars means nutrition bar makers need to work even harder to differentiate their products from others on the market while appealing to the same consumer preferences that snack bars do.”*

## Kids' Snacking - UK

“Three in ten kids say that they like to try new flavours of snacks. Opportunities therefore exist for brands to capture the attention of a sizeable minority of children through innovation on flavour, these end users now influencing the snack choice of half of parents. One way that brands could ...

## Food and Drink - International

*and 36% of consumers who indicate purchasing less salty snacks in the past ...*

## Leisure Venue Catering - UK

“Leisure venue operators should reflect trends in snacking NPD such as for varied popcorn flavours in order to ensure that their own snacking ranges live up to expectations in terms of being treat purchases.”

## Ethnic Foods - US

*“When it comes to ethnic food eaten and prepared at home, restaurants continue to pose a threat because of constant innovation that attracts consumers. In order to remain competitive, companies need to focus on product development that blends authenticity with familiarity, while offering unique flavor combinations. Additionally, providing consumers with ...*

## Performance Food and Drink - US

“Although a portion of active consumers are users of performance food and drink, a segment of exercisers abstain from the category for lack of need, preference for other foods, and concerns about product cost. Manufacturers need to address these concerns by focusing communication on the formulation, scientific tests, and other ...

## Cider - UK

“Cider producers should be looking to build value into their products to justify a higher price, with purity, limited/special editions and single origins/batches the best ways of encouraging drinkers to trade up.”