

**December 2014**

### **Access Control (Industrial Report) - UK**

“There is potential for access control products to add more commercial value in terms of business intelligence as applications in the airport sector have shown. Innovation in the access control market is expected to increase due to the arrival of new companies in the sector.”

– Ben Harris, Industrial ...

### **Balas e Doces Industrializados - Brazil**

“A categoria de balas e doces industrializados é altamente dominada pelas cinco maiores empresas, que juntas geram 90% das vendas em volume e valor. No entanto, a maior parte de novos produtos é lançada por empresas menores, o que ilustra o quão fragmentada é a categoria em termos de lançamento ...

### **Beauty Retailing - Canada**

“Beauty product and personal care shopping is fairly routine for the majority of consumers. Brick & mortar and online stores will benefit from staying in tune with their consumers’ preferences, offering promotions based on information gathered. Retailers may also want to offer incentives to encourage purchasing of new products as ...

### **Beer - China**

“China surpassed the United States in 2010 to become the biggest beer market in the world and is now nearly double the market size in retail volume terms of the US market; the current second largest market for beer. It is now clear that the beer market has started to ...

### **Black Consumers and Alcoholic Beverages - US**

“Black consumers like alcoholic beverages that are indulgent in some way, whether it’s in the smooth taste, flavors, or in the packaging design. Blacks like to drink at home as much, if not more so than they do outside of

### **Auto Service, Maintenance and Repair - US**

“While growth in the auto service and repair market is slow and steady, many factors are changing the dynamics of how overall revenues are distributed. Dealerships continue to gain an advantage due to free maintenance programs, while independents and others can push back by updating the image of their technicians ...

### **Beauty & Personal Care Vending - UK**

“The BPC vending market is well placed to benefit from emerging key trends in the BPC markets such as customisation and digital testing. The rise of beauty apps has seen consumer awareness of new technologies increase and the BPC vending market has an opportunity to convert experimentation into purchasing.”

### **Beer - Canada**

“Establishing food-led drinking occasions for beer, specifically by promoting the pairing as a part of a regular meal, may be a route for beer brands to increase usage. Keeping the spotlight on everyday/regular foods will deter beer-food pairings from competing directly against wine-food pairings, and should help counter beer’s ...

### **Beer - UK**

“Immigration into the UK from countries such as Romania and Bulgaria looks set to continue in the coming years. The time may therefore now be right for retailers and brands alike to roll out beers from these countries more widely in the UK, particularly as the major beer companies such ...

### **Building Products (Industrial Report) - UK**

“The building products market comprises a diverse range of products, virtually all of which are enjoying significantly improved conditions in 2014, following a trend that started to emerge in 2013. Future prospects

the home. There are distinct subsegments, and marketers should keep ...

## Car Service and Maintenance - UK

“In a market where competition between those offering services is high, a major challenge for any supplier is how to grow sales. Understanding both the reasons behind competition as well as the demands of drivers and owners is crucial. Equally, addressing the small percentage of drivers that don’t appear to ...

## Clothing Retailing - Ireland

“Value for money is still the key factor driving consumers when buying clothing in 2014, to the benefit of retailers who offer lower-cost clothing. Moving forward, making improvements to the overall shopping experience, such as better fitting rooms, might help to attract more consumers towards higher-end retailers.”

- **Brian O’Connor** ...

## Condiments and Dressings - US

“Positioning products as a helping hand to assist less skilled home cooks to achieve the end results they desire should find strong appeal among this group. In contrast, developing more complex products that push experienced cooks beyond their edge may appeal to those looking to expand their repertoire in the ...

## Cooking Sauces, Marinades and Spices - US

“Consumers – particularly that increasingly important group, Millennials – are more interested in unprocessed foods because they perceive them to be healthier and ‘higher taste’ foods for the unique flavor. Cooking sauces may be able to slow down projected declines, and marinades may be able to increase sales more quickly ...

## Defence Equipment (Industrial Report) - UK

“The Strategic Defence and Security Review in 2010 has heavily influenced what the sector has been able to achieve over the last four years. With the spending cuts lasting for at least another year, strategies and defence

are for strong growth with construction continuing to be at the forefront of overall UK economic development. However ...

## Children's Media - UK

“Given that there is only a seven percentage point drop between the proportion of children who discover new content through ads and who discover new content through their parents purchasing it for them, it may be more effective for content owners to market directly to parents.”

## Coffee Shops - UK

“In a market with low brand loyalty, operators could benefit from building a deeper relationship with fans to foster real loyalty rather than just catering to consumers’ bargain-hunting and promiscuous spending behaviour.”

## Consumers and General Insurance - UK

“Consumers want their insurance providers and policies to be more transparent and to understand their insurance cover better. Underwriting is seen as a dark art and demystifying it is likely to lead to greater levels of consumer trust and higher levels of loyalty”

## Cosmetic Surgery - UK

“The UK cosmetic surgery market could benefit from further capitalising on the burgeoning population of adults that qualify as overweight or obese. Clinics could look at more widely marketing treatments designed to help people reduce their weight, as well as highlighting the benefits of excess skin removal surgeries.”

## Digital and Print Magazines - US

“Digital editions of magazines have not taken hold to the extent that magazine marketers may have hoped for at the outset of the launch of the iPad. While digital replications of the print format will gain steam looking



equipment procurement will continue to be chosen with efficiency and 'best value' as ...

## Digital Trends Winter - UK

“Unless media providers look to expand into new categories and follow the Amazon Prime model, partnerships between existing players could not only deliver better value but also better integration – something consumers will strive for as they begin to think more about their connected ‘ecosystem’.”

## European Retail Briefing - Europe

**This month ERB includes:**

## First Aid - US

“While the first aid market experiences steady sales, growth is limited because consumers tend to use products only when they have an injury. There are opportunities to increase ownership among growing population groups, which could help to boost sales in the coming years.”

– **Emily Krol, Health and Wellness ...**

## Grocery Retailing - Ireland

“The popularity of own-branded products and discounters is unlikely to wane in the foreseeable future. Indeed going forward Mintel expects the market share of own-label and discounters to continue to grow with many consumers finding own-label goods to be of equal quality to more expensive branded goods”

– **David Falls ...**

## Hispanic Consumers and Alcoholic Beverages - US

forward, the discrepancy between hopes for digital and current performance likely lies ...

## Estilo de Vida dos Millennials - Brazil

“Conveniência, sustentabilidade e customização são aspectos importante para os millennials, estando estes entre os principais fatores que os influenciam suas decisões de compra. Acostumados com a conveniência de atividades online, os millennials desenvolveram um desejo por gratificações e respostas imediatas que se reflete em outros aspectos de suas vidas, como ...

## European Retail Rankings - Europe

This report provides a snapshot of the leading retailers in Europe, ranked by 2013 revenues. We cover the Top 350 European retailers and include country and sector sections, which detail those of the top 350 companies that are present in those markets. In the text we cover the main trends ...

## Furniture Retailing - UK

“The biggest issue for furniture retailers is to create a compelling identity which consumers can relate to. Each company needs to be very clear about its own unique proposition and should continue to build on this image consistently when designing store interiors or conducting advertising campaigns. By enhancing their branding ...

## High Net Worth Women - US

“More women are holding leadership positions in corporations, which helps them contribute financially to their household. Nonetheless, they continue to fulfill their traditional duties of caring for their family. Consequently they need a financial provider who can understand their unique situation and be a partner in helping them manage it ...

## Home Insurance - UK

“Home insurance can be a hostile market for new entrants because it is hard for brands to create

“Hispanics have so many options to choose from when deciding which alcoholic beverages to purchase. They decide based on the occasion and the people that they will be with. However, it is seldom that they purchase something they are not familiar with. Bars and restaurants are ideal settings to promote ...

## Leisure Review - UK

“With any leisure business, revenues and profits are dictated by capacity and the ability of that business to maximise efficiencies from that capacity; if automation offers a way of increasing throughput, this can have a beneficial effect on profitability because the core overheads essentially remain unchanged.”

– **Michael Oliver ...**

## Live Entertainment - US

“Even among consumers who are the most likely to attend live events, there is some frustration regarding the value they receive in exchange for what they pay. Therefore, increasing the perceived value of admission will likely drive engagement, while better targeting for specific types of promotions will help lead already ...

## Marketing to Millennials - Brazil

“Convenience, sustainability, and customization are important aspects for Millennials, and the main factors that influence their purchasing decisions. Millennials are used to the convenience offered by online activities, and have developed a need for immediate answers and gratification in all aspects of their lives, including professional careers and work environment ...

## Medical Equipment (Industrial Report) - UK

“Impending new EU regulations covering the industry are likely to change the landscape for manufacturers. Companies will need to accommodate an increased burden of compliance, which is set to involve far greater scrutiny of the product supply chain.”

– **Ben Harris, Industrial Analyst**

## Natural and Organic Toiletries - UK

sufficiently distinct identities for themselves, and because consumers place such importance on strong reputations and previous experience.”

## Lifestyles of Couples Without Children - UK

“Whilst childfree couples are more satisfied with the quality of time they spend together, they could benefit from more offerings geared to them as a unit, rather than individuals with similar interests. This would include activities or classes where couples could work towards a shared goal and develop mutual interests ...

## LSR: Coffee Houses and Donut Shops - US

“Coffee house and donut shop consumers say they are worried about the lack of healthy options and the high caffeine content of their beverages. Operators can do a better job of providing a wider variety of foods that their consumers define as healthy and offering beverages with different levels of ...

## Marketing to Mums - China

“According to the National Bureau of Statistics, there are more than 15 million women giving birth to babies in China every year, with the majority of them (about 65%) being first-time mums. The proportion of first-time mums is even higher amongst urban consumers – reaching an average of 89% over ...

## Medicated Skincare - US

“Medicated skincare product sales are expected to grow steadily in the coming years. Market players can accelerate growth by delivering new product benefits, expanding into new categories, addressing the needs of consumers with chronic skin conditions, and increasing their engagement of Hispanic and Asian consumers.”

– **Gabriela Elani, Home ...**

## Online Entertainment - Ireland

“Price is a barrier in this category, with natural/organic being a lower priority when buying products. This offers opportunities for brands to present more appealing pricing strategies, such as secret discounts. With certification being a low indicator of whether a product is natural or organic, this suggests a lack ...

## Passive Fire Protection Equipment (Industrial Report) - UK

“Demand for passive fire materials has been challenged in recent years with low levels of construction activity. However, new build prospects are far stronger than the overall economy, and this will result in strong demand for passive fire products and materials over the next few years. Individual product areas have ...

## Pharmacy Retail - China

“The ability for a store to embrace the latest technology innovation to provide seamless services and shopping experience will become the key differentiator for retailers to stand out while segmenting the consumer based on their different behaviour and attitude would make a pharmacy retailer more efficient. For large players, designing ...

## Professional Cosmetic Services - US

“While growth in the professional market appears to be steady, declining interest in services among an aging population could be problematic. Nonetheless, concerns about looking older are pervasive and suggest opportunities for personal care products that bridge the gap between the retail and professional markets.”

## Residential Windows and Doors (Industrial Report) - UK

“As 2013 progressed, virtually all of the factors that had previously suppressed the growth of the windows and doors market materially changed, and a period of sustained growth can now be expected. The most significant factors that did not are the availability of credit, but this too will slowly ease over the next few years; and high penetration levels of ...

“Online gambling is the largest sector of the online entertainment market in Ireland and continues to experience growth. However gambling operators will have to respond to increasing social and political pressures to reduce the risks of gambling addiction amongst consumers.”

– David Falls, Research Analyst

## Performing Arts - UK

“Performing arts organisations’ digital focus should be on their expertise as creators, and enabling their growing online audience to act as curators of the content they produce.”

## Preparing for Guests - UK

“Home entertaining has a big influence on the usage of household care products. Making the home smell fresh is one of the most important elements of preparing the home for guests, and so the development of more premium fragrances in a whole host of household care products, including toilet cleaners ...

## Renewable Energy (Industrial Report) - UK

“Despite the renewable energy market growing rapidly in recent years, investor confidence has started to decline. This is largely due to frequent government policy changes and the lack of a clear, long-term energy policy, making the renewables sector increasingly fragile. Although the deployment of renewable energy is set for sustained ...

## RTD Alcoholic Beverages - US

“Sales in the RTD alcoholic beverage category will grow for the foreseeable future, but this category has a history of up-and-down performances, from the heyday of the launch of wine coolers to the growth of alcopops and flavored alcoholic beverages, and the accompanying demise between the emergence of each. Due ...

## Sauces and Seasonings - China

“Consumers welcome easy solutions to cooking. There is scope for manufacturers to develop more specialised sauces and ready-to-use sauces, given that consumers would have a clearer concept of which ingredients best pair with the sauces and seasonings under the direction of the specialised sauces and seasonings, and ready-to-use sauces provide ...

## Secondary Residences and Holiday Rentals - Europe

“About 1.76 million people joined the global [HNWI] population, which rose to a total of 13.7 million and the investable wealth of HNWIs grew by nearly 14% to reach a record high of US\$56.62 trillion in 2013 ... HNWIs are most likely to have the necessary ...

## Small Kitchen Appliances - US

“Small kitchen appliances must, first and foremost, make food and beverage preparation faster and easier. However, once this core task is met, a host of other motivations and qualities may drive and shape SKA purchasing. How, where, and why different consumers ultimately select a given SKA is also shaped by ...

## Sugar Confectionery - China

“Competition in the market is forcing manufacturers to diversify their product to meet the needs of increasingly sophisticated consumers. There are increasing new opportunities for products aimed at specific consumer segments, such as women and the elderly. There is also the opportunity to target high-end consumers with hand-made candies sold ...

## Table Sauces and Seasonings - UK

“Products such as seaweed and umami-flavoured powder offer ways to keep consumer spend in the seasonings category even if they cut back on salt usage.”

## Saving and Investing - Intermediary Focus - UK

“Investment intermediaries are operating in a tough environment, with an increased regulatory burden. However, firms that are adequately capitalised and resourced can take advantage of a number of new opportunities in order to boost their revenue streams.”

## Self Invested Personal Pensions - SIPPs - UK

“The 2014 Budget reforms have given pension holders greater flexibility and choice at retirement, greatly stirring up the landscape of the pensions’ industry. While income drawdown seems to be the most popular choice among SIPP investors following the Budget announcement, annuities still remain on the books for many, alongside encashment ...

## Sugar and Gum Confectionery - Brazil

“The Brazilian sugar and gum confectionery market is highly concentrated, with the top five operators accounting for more than 90% of the sales by volume and by value. However, the biggest share of new product launches comes from smaller companies, showing that the sugar confectionery market is highly fragmented in ...

## Sugar Confectionery and Breath Fresheners - US

“While there remain concerns about the nutritional content of sugar confectionery products, ultimately, consumers still want to indulge. The category continues to grow as a result of new product innovation catering to consumption occasions and keeping the category fresh and exciting. In addition to these successes, there is opportunity to ...

## The Budget Shopper - US

“Coupons are still an effective way of appealing to budget shoppers. Not only do they provide tangible value, but they can sway consumers to try products or stores they may not have otherwise considered. Retailers should strive to make it easy and even fun for customers to use coupons, tailor ...

## The Insurance Purchase Decision - Canada

“Moving from a product- to a solution-centred relationship is the challenge that insurance companies face as they strive to increase brand loyalty and share of customer wallet.”

– **Sanjay Sharma, Senior Financial Services Analyst**

## Travel Agents - UK

“The casual, non-committal browsing environment offered by concept stores should prove appealing to consumers, but in-store sales conversion rates will likely take a hit. However, for larger brands this could be offset somewhat by a realigned focus on selling higher-margin, differentiated products, or by working to boost the sale of ...

## Visitor Attractions - UK

“Technological advances are providing the opportunity for attractions to innovate in terms of the experience they can offer. They are able to create far more sensory and immersive experiences that will further blur the lines between fun and learning”.

– **Rebecca McGrath, Research Analyst**

## Youth Fashion - UK

“Friends have a greater influence on what young people wear than models in magazines, TV and films or even celebrities, meaning that retailers and brands are in a prime position to capitalise on a growing trend for selfies and turn shoppers into models.”

– **Tamara Sender, Senior Fashion Analyst**

## 啤酒 - China

“中国在2010年超越美国成为世界第一啤酒生产大国，其规模几乎是位居第二的美国啤酒市场的两倍。显而易见，啤酒市场已经开始饱和，内生增长的空间日益有限。因此，该市场的增长更有可能通过产品质量升级和消费者趋优消费，而非扩张渗透实现。高端化将是决定啤酒品牌在中国市场成功与否的关键。”

– 张一，高级研究分析师

## The Premium Brand and Luxury Consumer - US

“The internet is the ultimate equalizer, and it has given brands both large and small a chance to communicate directly with consumers; however, the ‘access for all’ mentality of the web does not always work in favor of brands that have an exclusive reputation to manage. Though the adoption of ...

## UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s focus is on the grocery sector.

## White Spirits and RTDs - UK

“The continued decline in volume sales of bottled RTDs makes a complete overhaul of the segment a necessity. A shift to premium bottle designs coupled with a focus on more adult orientated flavours would be a good starting point.”

## 医药零售 - China

“一方面，实体店利用最新科技技术，为消费者提供无缝服务和购物体验，将成为在竞争中脱颖而出的关键因素；另一方面，根据消费者不同的行为习惯和购买态度细分消费群体能够使医药零售商运营更加有效。对于大型零售商而言，根据当地人口特征和需求制定本地化的零售战略至关重要。”

– 陈文文，高级研究分析师

## 糖果 - China

“该市场竞争激烈，促使厂商多样化产品以满足日益精明的消费者的需求。针对女性、老年消费者等特定消费者群体的产品拥有的机会越来越多。品牌也有机会针对高端消费者，在高端商店出售手工糖果。在线零售的快速发展也让糖果厂商有机会获取更多新消费者，并通过与消费者直接沟通了解他们的喜好和消费习惯。”

– 郭马修，亚太研究主任

## 酱料和调味品 - China

“从2009年到2014年，中国酱料和调味品(包括各种酱料和鸡精等佐料)市场以两位数的速度高速增长，超过了国家统计局公布的整体零售食品市场增长速度(7.4%，除饮料和烟草)。这表明调味品在食品市场中的地位逐步上升。中国消费者的可支配收入增加，拉动了消费向更高端的产品升级；同时，人们越来越常在家做饭，也推动了零售市场中调味品的消费量。”

在该市场中，高端化和市场进一步细分是最明显的两个趋势。从产品创新的角度来看，更多公司使用有机原材料或采取更先进的生产工艺。

## 面向妈妈的市场营销 - China

“现今的妈妈们都认为拥有良好的外表和保持家庭幸福(以孩子为焦点)同样重要，这表明美容产品和教育服务创新有机会满足她们的新需求。除了产品营销，道德营销也被证明在妈妈中奏效。同时，妈妈们在态度和购买力上的差别表明，在向不同级别城市的妈妈们进行营销时，有必要采取有针对性的营销策略。”