

### January 2020

#### Beer - UK

"The low-/non-alcoholic beer trend has helped to keep beer on the menu for consumers prioritising health. That a quarter of 18-24s are keen to see more of these varieties presents a good opportunity for low- and non-alcoholic beer alternatives when targeting the younger consumer, which bodes well for ongoing ...

### December 2019

#### Foodservice in Retail - US

"The retail prepared foods business is growing quickly year over year, with more people purchasing them and making more frequent purchases. This is largely thanks to prepared foods' ability to deliver affordable convenience and a satisfying variety of options to time-strapped consumers. Grocers are investing in convenience with more tech-enabled ...

#### Dark Spirits - US

"Dark spirits had another year of growth posting strong five-year growth driven by consumer interest in premium drinks, craft offerings and even cocktail culture keeping the category well positioned with its base for the future. Yet, optimal growth will hinge not only on nudging upgrades from dedicated consumers to even ...

#### White Spirits - US

Spirits continue to enjoy growth in both dollar and volume sales, outperforming beer and wine. Consumer interest in craft production, brand stories and premium drinking experiences has propelled many spirit brands, especially high end and super premium spirits. Though total US alcohol consumption is in decline, high end and super ...

#### The Leisure Outlook - UK

"Consumers have begun preparing for Christmas by adding to savings and reducing spend on nights out. While participation in some leisure activities is expected to take a hit, indoor venues look set to at least maintain

#### Cooking Sauces and Pasta Sauces - UK

"Cooking/pasta sauces are only used as an emergency meal solution by half of users, but need to appeal beyond this. To increase usage, brands need to emphasise being a short cut for sauces hard to make at home, offer more variety in ethnic sauces, and promote healthiness, naturalness and ...

#### Poultry - US

"The chicken segment dominates the poultry category and is essentially keeping it in the black with marginal growth while other poultries are declining. Participation is nearly universal, with chicken capturing most of the consumption, making growth a challenge. Increased consumption of other poultry types and finding new occasions and uses ...

#### Eating Out Review - UK

"Growth in the eating-out market is being driven by affluent diners who are spending more on quality dining experiences as well as the convenience of quick meals through the home delivery channel. However, the market lacks budget-friendly options for price-conscious consumers, which has resulted in some worse-off consumers exiting the ...

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

"With a market size in excess of \$6 billion and a nearly universal consumer penetration, sauces and marinades have reached maturity, which brings challenges. The category is diverse and fragmented, yet consumers show

## Food and Drink - International

trading levels as the winter cold settles in. Pubs hope to boost pre-Christmas trade ...

signs of boredom – customizing products and making them from scratch, as well as interest in new ...

### Dining Out in 2020 - US

"Restaurant sales are predicted to maintain steady growth in coming years but are vulnerable to volatile economic conditions, triggering a decrease in dining out spending. Americans' interest in casual and off-premise dining is largely fueling industry growth, leading to a rise in new delivery formats including ghost kitchens along with ...

### Better for You Snacking - US

"Consumers are increasingly living on-the-go lifestyles where a quick snack can be a better fit than a sit-down meal. And with many adults looking to improve their health through diet, there is a solid market for healthier, more nutritious snacks. This report examines the better-for-you snack trend, looking in depth ...

## November 2019

### Meat-free foods - UK

"The growing flexitarian movement has driven the success of the meat-free market and established an engaged consumer base amongst younger consumers. Yet as the market becomes increasingly crowded, products need to work harder to distinguish themselves from the competition, for example through holistic environmental credentials, enhanced nutritional profiles or exciting ...

### Processed Poultry and Red Meat Main Meal Components - UK

"With consumers limiting/reducing their eating of processed meats for health or environmental reasons and the number of meat-free substitutes growing, it will be important for brands to focus on ingredients and how products are made to help keep processed meats on the menu. Calling out details of provenance will ...

### Wine - US

"Total US dollar sales of wine topped \$65 billion in 2019. Wine has enjoyed fairly steady yet modest growth, outpacing that of beer but falling short of spirits, thanks to a broad and often steadfast appeal to a wide swath of consumers across generations. Brands have been working to expand ...

### Food and Drink Shopper - US

"While food and drink shoppers still view cooking at home from scratch as the standard for health, freshness and taste, they have an ever-widening array of shopping options to choose from for fresh meals. For food and drink retailers, the challenge and opportunity is to make cooking and eating fresh ...

### Supermarkets - UK

"During an uncertain period, demand in the grocery sector has held up well. Within this the underlying demographic shifts continue to see sales move away from larger-format stores, but they remain the format that attracts the majority of two thirds of consumers' grocery budgets."

– Nick Carroll, Associate Director ...

### RTD Alcoholic Beverages - US

"At a time when consumers report reducing alcohol consumption, and alcohol sales are leveling off, the historically small ready-to-drink (RTD) alcohol space is thriving. RTDs posted the only gains in alcohol consumption from 2018-19, and volume sales of the two largest segments (flavored malt beverages [FMBs] and prepared spirits-based cocktails ...

### Condiments - US

"The condiments category continues to experience modest growth, gaining 5.9% since 2015 with

### Better for you Eating Trends - US

"The vast majority of consumers report eating foods they feel to be healthy at least some of the time, but

## Food and Drink - International

expectations to reach \$7.7 million by the end of 2019. Increased sales are largely supported by the growth of the category's largest segment, pickles, olives and relish, while other more fragmented segments in the category ...

### Pizza Restaurants - US

"Top pizza restaurant chains continue to grow same-store sales YOY (year over year), although they face increased delivery and off-premise foodservice competition from third-party delivery companies and most other restaurant and retail segments. As a result of this heightened competition, top pizza chains are investing heavily in off-premise business solutions ...

### Coffee Shops - UK

"As coffee is now an expected product in foodservice outlets, eateries with accessibly priced hot drinks, alongside a strong food offering, have an advantage over specialist coffee shops. Reviewing price strategies are an obvious starting point for coffee shops to fight back, as people are now spreading their budget across ...

### Beer - US

"Dollar sales of beer, craft beer and cider are estimated to reach \$117 billion in 2019, and are projected to post on-going moderate growth through 2024. Challenges to the market however include shrinking volume sales, as more consumers report reduction of beer consumption rather than an increase. Flavor innovation and ...

### Coffee - UK

"Britain today is a nation of coffee drinkers as much as tea lovers, usage of each standing at four out of five adults. The industry stalwarts, however, face a challenge in that the younger age groups are noticeably less brand-loyal than older coffee lovers. Compelling storytelling can win them over ...

### On-premise Alcohol Trends - US

opinions and attitudes on what a healthy diet is vary greatly. Brands making better-for-you claims need to stay on the pulse of trending diets, yet not lose sight of the ...

### Restaurant Ordering and Delivery - US

"With more delivery options than ever before, Americans can enjoy their favorite restaurant meals without even leaving their homes. And these new and unique ways of ordering are chipping away at actual restaurant visitation, fueled by the explosive growth of third-party delivery companies and continuing operator investment in their own ...

### Yogurt and Yogurt Drinks - US

"Yogurt sales are beginning to fall as yogurt drinks take share from the spoonable segment and constant innovation in style and flavor leads to increased competition and consumer fatigue. Performance will be dependent on brands' ability to align functional claims and positioning with consumers' rapidly changing definition of "healthy." ...

### Supplements - US

"The supplements segment leads the way for continued growth of the vitamins, minerals and supplements market, surpassing vitamins in overall market sales in recent years. Supplements can play in the wellness space more so than vitamins and minerals on their own, with seemingly limitless opportunities for combining functional ingredients offering ...

### Still, Sparkling and Fortified Wine - UK

"The alcohol moderation trend poses a challenge for wine but lower/non-alcoholic variants are yet to realise their full potential. Developing more L/N/R versions with strong quality/craft emphasis should help to drive sales, particularly if coupled with marketing messages portraying these as a more interesting and sophisticated ...

"Americans' mindset and attitudes toward drinking have undergone a paradigm shift in recent years. While patrons of all ages are still drinking on-premise, younger generations are putting greater emphasis on their health and wellness, leading to more moderate drinking habits. Bars and restaurants should focus on offering options that fit ...

### October 2019

#### Bacon and Lunchmeat - US

"The bacon and lunch meat category continues to experience slow and modest 0.5% annual growth, reaching \$19.8 billion in 2019. Bacon and lunch meat remain a household staple, although consumption is lower among small households, especially among women without children, seniors, and consumers aged 18-24. Amid protein-centric nutritionally ...

#### Yellow Fats and Oils - UK

"Taste is more important than anything else in butter and spreads, and more than two thirds of buyers say they eat too little butter/spread to worry about it being healthy. However, this still leaves a sizeable minority of buyers for whom healthiness is an important selling point. Spotlighting low ...

#### Cheese - US

"The mature cheese market continues to manage modest sales growth. Cheese benefits from a generally healthy reputation, and for the category's most ardent users, it manages to merge those healthy notes with a degree of indulgence. Reflecting that notion, the growth that is most pronounced is found in the natural ...

#### Cooking in America - US

"There are over 80 million Americans who enjoy cooking, cook often, and cook because they want to, not just because they have to. An additional 43 million share their enthusiasm, even if they don't cook as often. This receptive audience bodes well for brands in the cooking space. However, this ...

#### Cheese - UK

"Reminding consumers of the nutritional benefits of cheese such as its protein and calcium content remains pertinent to boost the category's healthy image and promote more frequent usage. This should also help the market to capitalise on the flexitarian trend, which presents an opportunity for cheese to play a more ...

#### Restaurant Decision Making Process - US

"Mintel forecasts moderate growth in the restaurant industry, buoyed by a positive macroeconomic landscape that allows consumers to spend more on AFH (away from home) dining. However, on-premise dining is challenged by the abundance of prepared food choices, including food from retailers, food trucks, meal kits and delivery services. Opportunities ...

#### Pizza and Italian Restaurants - UK

"The rising costs of operating sit-down venues will be unsustainable for some pizza and Italian restaurants in the long run. Instead of adding more restaurant sites, operators will focus on two areas: enhancing the dining experiences at their flagship stores and expanding their delivery catchment areas through third-party delivery companies ...

#### Milk and Non-Dairy Milk - US

"Milk sales are composed of two opposing, connected markets: the struggling, but sizable dairy milk market and the growing non-dairy milk market. While traditional dairy milks are still considered a household staple by most consumers, sales are declining due to rapid innovations in the non-dairy market and low prices that ...

### Food and Non-food Discounters - UK

"The discount sector continues to enjoy positive growth and the main players across both food and non-food discounting continue to build their store estates through organic openings. Aldi and Lidl are increasingly blurring the lines between discount and convenience in the UK. The non-food discounters, however, are making fewer strides ...

## September 2019

### Perimeter of the Store - US

"The perimeter of the store continues to grow but faces increasing competition, not only from restaurants and food delivery services but also from a revitalized frozen food aisle. A key to continued growth for perimeter is winning over younger adults, who are more likely to be drawn to other, more ...

### Attitudes towards Sugar and Sweeteners - UK

"The continued government and media spotlight has put sugar firmly on consumers' radars as an ingredient to scrutinise. This is also fuelling widespread efforts to limit or reduce sugar in their diet. This underscores that sugar reduction remains an imperative for food and drink operators, not just to meet government ...

### Center of Store - US

"The center of the store encompasses a wide variety of products from indulgence (ice cream, salty snacks and cereals) to extreme convenience (canned soups, frozen meals, pizzas and vegetables), and this dichotomy is calibrating a sales pattern that is stalled. As consumers continue to prioritize foods perceived to be fresher ...

### Marketing to Moms - US

"Moms are responsible for most household and childcare duties, meaning that they are the key decision makers when it comes to what their families eat, wear, and watch. However, this also means moms are being pulled in a million different directions and may not have the time or the inclination ...

### Hot and Cold Cereal - US

"The hot and cold cereal category continues to experience consistent declines, hitting a five-year sales low of \$10.3 billion in 2019 following a modest 1% decrease from 2018. The cold segment dominates cereal sales, and its performance largely influences category success or lack thereof, to no avail of hot ...

### Dark Spirits and Liqueurs - UK

"Drawing on historical recipes has much to offer for dark spirits. Historical recipes for the drinks themselves chime with a quarter of 45-54s, signalling potential to retain users in the category. Meanwhile historical cocktail recipes using dark spirits would help to generate consumer excitement around the category, especially among under-35s ...

### Alcoholic Beverage Drinking Occasions - US

"While the majority (85%) of US adults age 22+ drink alcohol, one in five drinkers has reduced their consumption in the past year, continuing a trend in moderation that stunts performance. Dollar sales of alcohol are projected to reach \$250 billion in 2019. While this is an 18% growth from ...

### Flavor Innovation on the Menu - US

"Demand for flavor innovation on the menu is already high, and it's poised for continued future growth alongside the population growth of the most Adventurous Eaters: young and Hispanic consumers. Millennials in particular are hungry for less-common

## Food and Drink - International

flavors and ingredients on the menu, spanning everything from sour flavors to seafood ...

### Vitamins and Minerals - US

"The vitamins and minerals market remains steady, with the majority of adults currently taking at least one vitamin or mineral. While younger consumers are driving demand for innovation and personalization, traditional formats and formulations continue to be important to overall market strength. However, a demand for natural, specifically whole food ...

### Pet Food - UK

"The high level of innovation centring on high-quality, health-boosting and all-natural ingredients is making it difficult for products to stand out in the increasingly crowded premium pet food space. Greater transparency, for example through spotlighting ingredient provenance, will help build trust and create compelling points of difference.

## August 2019

### Attitudes towards Sports Nutrition - UK

"The sports nutrition market is going through a major transformation, muscling its way out of its athlete-focused niche into the mainstream. A more accessible and widely resonating 'active lifestyle' positioning, together with product innovation and wider availability through mainstream channels, has been at the heart of this shift. There are ...

### Vegetables - US

"Sales of vegetables continue to grow conservatively but steadily, with growth in the frozen and fresh segments mitigated by declines among shelf-stable varieties. Consumers appear interested in adding more vegetables to their diet, but with novel concepts in other categories incorporating vegetables or even using them as a base, vegetables ...

### Tea and RTD Teas - US

### Restaurant Breakfast and Brunch Trends - US

"Restaurant breakfast and brunch visitation is on the decline, driven by the proliferation of premium breakfast retail options coupled with consumers' lowered perceptions of breakfast as an important meal occasion. Operators should concentrate on expanding coffee beverages and nontraditional breakfast offerings including global flavors, snackable options and plant-based ingredients to ...

### Bread - UK

"While health concerns pose a barrier to uptake of bread, there is openness to bread with lower carbohydrates or made from more nutritious flour. Bread makers have the permission to position their products as contributing to healthy lifestyles.

### Sweet & Nut Spreads - UK

"Further innovation in no added and reduced-sugar products is essential in view of government reformulation targets and widespread consumer concerns over sugar. Where a lower sugar content results in a less sweet taste and more sophisticated flavour profile, this could also help companies retain users in the category for longer ...

### Breakfast Cereals - UK

"Sugar remains the key challenge faced by the category. While the vast majority of users would like to see the sugar content reduced in their favourite breakfast cereals, reformulation is not without risk. Steps to get consumers actively involved in reformulation hold potential to reduce the risk of backlash.

The ...

### Fruit - US

## Food and Drink - International

"The \$8.7 billion tea market continues to grow at a slow rate driven by smaller RTD brands and trendy kombucha. Though tea faces stiff competition from other beverages, and RTDs are under scrutiny due to their sugar content, tea is well suited to address the needs of today's consumers ...

### Burger and Chicken Restaurants - UK

"With more consumers rejecting single-use plastics and pledging to live more sustainably, fast-food brands and governments must draw up plans to eliminate single-use plastics, use more recycled plastic in food and drink packaging and work on more effective recycling."

### Attitudes towards Low- and Non-alcoholic Drink - UK

"The alcohol reduction trend looks to be here to stay. Encouraging moderation is on the government agenda, and cutting back on alcohol is also seen by consumers as offering various benefits, increasing its appeal. Crucially, the quality of the product is improving, meaning that switching to a low- or no-alcohol ...

### On-premise Restaurant Technology - US

"On-premise restaurant technology such as kiosks and tablets are offering operators multifaceted solutions to growing labor challenges and consumer demand for speedy foodservice; however, most consumers are still not very accepting of fully-automated restaurant concepts. Operators should lean into consumer-friendly tech solutions such as pre-ordering options and tableside payments for ...

"The fruit category is seeing slow growth, with a modest 1.4% increase from 2018 to reach \$42.2 billion in sales in 2019. The fresh fruit segment dominates fruit sales, and its success positively impacts category sales overall but steals market share away from center-of-store segments such as frozen ...

### Approach to Health Management - US

"Consumer spending on health-related services and products increased significantly from 2013-18, and a slowdown is nowhere in sight. Health management is universal, with many people placing significant pressure on medical professionals to guide their health and wellbeing through product recommendations and ailment and wellbeing care. With the foreseen doctor shortage ...

### Savoury Spreads & Dips - UK

"Sales of dips have grown strongly in recent years, but further opportunities exist for pairing dips with snacks, including pairings positioned for eating with specific alcoholic drinks, as well as encouraging higher usage with main meals. In ready-made sandwich fillers more premium and healthier options, including more products with high-protein ...

## July 2019

### Frozen Breakfast Foods - US

"With 2019 sales estimated to reach \$3.7 billion and forecast to continue on this same trajectory, the frozen breakfast category is holding its own, fueled by consumer pursuit of heartier breakfast solutions. Innovation in not only flavors and formats but also

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

"High quality of food is no longer a luxury but an expected standard for restaurants and takeaways. As such, operators need to pivot away from a focus on convenience to instead capture the simple joy of eating

nutritionally focused positioning is gaining traction as consumers ...

## Yogurt and Yogurt Drinks - UK

“Widespread consumer concerns around the packaging waste generated by yogurt/yogurt drinks signals a warning to the category given the wider movement against plastic. However, companies which are proactive in developing more eco-friendly packaging, for example with recycled plastic, stand to burnish their image as socially responsible and to boost ...

## Pet Food - US

“The pet food market found continued steady, conservative growth sustained by rising pet ownership coupled with premium innovation that reflects pet owner aspirations to provide nutrition, wellness and happiness to pets as valued members of the family. The changing retail landscape for pet foods, treats and supplies will continue to ...

## Sports and Energy Drinks - UK

“Although the leading brands are performing strongly, a new generation of energy drink brands looking to deliver energy through ‘clean’ and ‘natural’ formulations is shaking up the market. If awareness is fostered, these new entrants have sizeable potential to grow the market penetration of energy drinks by appealing to non-users ...

## Coffee - US

“The \$15.1 billion coffee category is projected to grow a respectable 22.7% through 2024 largely thanks to the trendsetting RTD (ready-to-drink) coffee segment, which is on pace to outgrow the long-time coffee leader, roasted coffee, within five years. The market is also driven by the continued modest growth ...

## Ready Meals and Ready-to-Cook Foods - UK

## Food and Drink - International

outside of the home.”

– **Trish Caddy, Senior Foodservice Analyst**

## Cookies - US

“The cookie market trails behind some US snack categories. Year-over-year growth is slower than some of the savory leaders, but outpaces confectionery and frozen options, both of which struggle with a poor perception of health. Prepared cookies make up the lion’s share of sales (and growth) in the category, followed ...

## Coffee and Tea on Premise - US

“Major coffee shop chains and third wave coffee shops have expanded consumer awareness and demand for premium roasts and specialty beverages, which are now especially popular with younger consumers. However, they face stiff competition from fast food restaurants, donut shops, c-stores and other casual restaurants that have expanded their offerings ...

## The Natural/Organic Food Shopper - US

“While the majority of consumers shop for a combination of mainstream and natural/organic foods and beverages, the segment that exclusively seeks natural and organic remains very small. Interest in organic products continues to resonate with certain demographics, specifically younger adults and parents, over others.”

**Karen Formanski, Health and Wellness ...**

## Tea and Other Hot Drinks - UK

“With tea and hot chocolate continuing to suffer from competition from coffee and soft drinks, brands in these categories need to look to new formats and more variety to tempt younger people who have a wide repertoire of drinks. Products focused on health and wellbeing, those meeting different needstates at ...



“Health concerns pose a long-standing barrier to uptake. Promisingly, however, there is high openness to meals with healthier ingredients or options featuring fortification, offering clear evidence that ready meals have permission to position themselves as contributing to nutritious diets and healthy lifestyles.”

### June 2019

#### Frozen Snacks - US

"Snacking is more popular than ever, with 95% of US consumers snacking at least once daily and the share snacking multiple times per day on the rise. Yet, while snacking may be a great fit for today's highly mobile consumers, significant competition has made it difficult for frozen snacks to ...

#### Attitudes towards Lunch Out-of-home - UK

"Lunch out of home continues to be a bright spot in the eating out market. However, lunch operators have to work on their value proposition as more people show a pragmatic approach to spending. Getting good value is not all about paying a low price. Brands that provide a range ...

#### Carbonated Soft Drinks - UK

"The shrinking population of key younger consumers, enduring concerns around sugar, and growing spotlight on single-use plastic waste pose challenges for the category going forward. The strong alcohol reduction trend meanwhile opens up new opportunities for CSDs to target. With few people seeing CSDs as a good alternative to alcoholic ...

#### Seasonal Dining Trends - US

"Seasonal menu items continue to be a key opportunity for operators to appeal to diners' interest in trying something new. While seasonal beverage menu items remain of high interest, diners are not buying as wide of a variety of seasonal foods from restaurants compared to retail. Operators should market seasonal ...

#### Children's Eating Habits - UK

#### Beverage Packaging Trends - US

"In an increasingly crowded drink market, innovations in packaging form, functionality and materials are important to convey product integrity – freshness, quality and sustainability. Yet, packaging falls very low on the list of importance when choosing food and drinks indicating that consumers don't fully understand the role packaging plays. Furthermore ...

#### Food Packaging Trends - US

"Packaging innovation continues to drive product launch activity. Between May 2018–April 2019, a third of food launches carried new packaging claims. While consumers don't necessarily recognize the impact packaging plays on product choice, the important factors they seek when shopping, such as freshness and convenience, are strongly impacted by packaging ...

#### Free-from Foods - US

"The free-from foods market is growing, and with 62% of consumers avoiding at least one ingredient, it is unlikely to slow in the near future. However, the market faces a number of challenges, such as differing priorities for avoiding ingredients, skepticism over the trustworthiness of the claims, and perceptions that ...

#### Soup - US

"Sales of packaged soup are, for the most part, stagnating, if not declining. Fresher soup varieties are able to leverage healthy, comforting attributes to appeal to consumers seeking more nutritious meal options. However, among younger consumers, there is a keen interest in snacking instead of meals, presenting a distinct challenge ...

#### Convenience Stores - UK

“Scratch cooking has a health halo, and many parents feel guilty if they do not cook from scratch, so brands able to reassure parents that not cooking from scratch is OK can look to win favour. Key messages for prepared meals or meal components should be about quality of ingredients ...

“Driven by continued shifts in grocery buying behaviour, a good summer and key events, the convenience sector is estimated to have enjoyed its strongest growth in three years in 2018. The year also saw consolidation, meaning the leading two players now control around half the market which will continue to ...

### May 2019

#### Ice Cream and Frozen Novelties - US

“Ice cream and frozen novelties are still freezer staples. However, sales in this mature market are mostly static. While traditional ice cream leads market share, shifts are in the works: the frozen yogurt/non-dairy segment has posted solid gains, aligning with broader consumer movement to incorporate plant-based foods into their ...

#### Grocery Retailing - US

“While consumers continue to migrate slowly to shopping online for groceries, most grocery shopping still happens in stores, making continued investment in the in-store shopping experience essential. In addition, traditional supermarkets face increasingly intense competition on several fronts, most notably value for the money and convenience.”

- John Owen, Associate ...

#### Seasonal Celebration Foods - UK

“The deluge of seasonal foods at these peak times of year makes it more challenging than ever for products to stand out. In this overcrowded space the need to grab shoppers’ attention has prompted a raft of unusual and playful innovation, injecting more fun into the market, appealing to consumers’ ...

#### Consumer Snacking - UK

“Strong openness to healthier characteristics in indulgent snacks offers good news for the industry as it faces PHE’s sugar and calorie reduction targets. That snacks are widely seen as a good way to boost your nutritional intake signals scope for healthier formulations to also focus on ‘positive’ nutritional credentials to ...

#### Chocolate Confectionery - UK

“Consumers’ preference for ‘less but better’ chocolate puts manufacturers in a difficult situation when it comes to making these treats healthier. The market is under pressure from the government, which is calling on treat categories to reduce sugar and calories. At the same time, most consumers are saying they do ...

#### Pub Catering - UK

“A shift to eating locally sourced ingredients will lead to demand for more seasonal varieties of meat, fish and vegetables as well as British-made products on pub menus. However, pubs/bars risk missing vital sales opportunities if they fail to cater to under-45s who choose to stay dry, and still ...

#### Energy Drinks - US

“The energy drink market remains an area of growth within the wider beverage industry thanks to large base of high frequency drinkers and increased energy needs among Americans. Sugar-free and fitness-focused energy drinks are thriving as consumers want beverages that provide a big boost without the sugar. Energy drink brands ...

#### Prepared Meals - US

“After a slight sales decline, the prepared meal category has enjoyed several consecutive years of positive growth, a trend expected to continue. Single-serve and side dishes have fared particularly well, with notable successes in vegetable-based side dishes catering to the consumer interest in increasing their vegetable intake, as well as ...

#### Pub Visiting - UK

#### Quick Service Restaurants - US

## Food and Drink - International

“Locally sourced food and drink attracts strong consumer interest and offers a viable means for pubs/bars to appeal beyond price. Flagging up that certain meal components or drinks are sourced locally would also help to strengthen the idea of pubs as supporting the local economy, evoking a feel-good factor ...

### The Millennial Impact: Food Shopping Decisions - US

"Millennials represent the largest generation group, comprising a quarter of the US population in 2018. They are an engaged group, being more likely than other generations to consider themselves “foodies” and more likely to enjoy shopping for food/drink. While they are entering their prime earning years, Millennials continue to ...

### Juice and Juice Drinks - US

"The juice market encountered another year of sales decline in 2018, as it continues to struggle with a sugary reputation that perpetuates a sometimes less than healthy reputation and stiff competition from other beverages. However, younger adults, parents, and Hispanics still show high engagement as well as strong interest in ...

## April 2019

### Added Value in Dairy Drinks, Milk and Cream - UK

“White milk continues to feel the benefits and drawbacks of its commodity status. A vast majority of consumers see milk as a staple in the household, underpinning near-universal usage. However, this also means brand differentiation remains challenging. Recycled plastics and sustainable farming garner sizeable minority interest in the milk and ...

### Pasta and Noodles - US

"The pasta category remains sizable, but annual sales has been largely stagnant in recent years and is expected to decline. Concerns about carbs and weight loss appear to be strongly impacting consumer behavior. At the same time, health-oriented advances such as vegetables and protein in pasta could stem some of ...

"Mintel forecasts the LSR (limited service restaurant) segment to grow 4.4% compounded annually through 2023. This growth rate is driven somewhat by fast casual restaurants, whose growth outpaces their QSR (quick service restaurant) counterparts. However, QSRs still represent the grand majority of LSR sales, and fast casual growth has ...

### Plant-based Proteins - US

"The plant-based proteins market is growing with no signs of slowing. The challenge moving forward will be for brands to find ways to please consumers with vastly different dietary and taste preferences. The majority of consumers report no specific dietary restrictions and are most focused on taste over specific ingredients ...

### Desserts - UK

“Desserts face competition from an array of other foods for the traditional after main course occasion, emphasising the need for continuing innovation. Traditional desserts with new flavour twists and desserts from other countries are untapped opportunities, while being extra-indulgent, visually appealing and offering flavours not currently on offer play a ...

### Cordials and Squashes - UK

“The 2018 summer heatwave was a boon for cordials and squashes that saw growth return following five years of decline. However, sales in this traditionally family-oriented category have also been lifted by the strong performance of new adult-oriented options that offer more sophisticated flavour profiles. Meanwhile, British fruit can be ...

## Food and Drink - International

### The Ethical Food Consumer - UK

“Widespread consumer doubts over whether their buying choices truly make a difference make it crucial for companies to explain to consumers the benefits to wider society of buying certified products. This would serve both to reassure the doubtful and tap into the strong feel-good factor around ethical food and drink ...

### Carbonated Soft Drinks - US

“Despite growing consumer aversion to sugar, the CSD (carbonated soft drink) market remains one of the largest non-alcoholic beverage markets and one characterized by general stagnation rather than steep decline. 2018 was a strong year for CSD brands with sales growth occurring among most full-calorie CSDs and a revitalization of ...

### Brand Overview: Food - UK

“Consumers’ habits are changing, such as through the cutting of meat consumption or searching for healthier foods. However, such is the correlation between taste and purchase intent within the food sector that brands with a particularly premium or delicious image can leverage the superior experience that their product can offer ...

## March 2019

### Soft Drinks Review - UK

“The soft drinks market has faced a challenging period as sugar has come under public spotlight since 2014. These drinks have, however, retained a substantial place on consumers’ menus. The significant challenge ahead is how to respond to the current scrutiny of single-use plastic packaging, in terms of both government ...

### Cakes, Cake Bars and Sweet Baked Goods - UK

“While lower sugar is the key attribute seen to denote healthier cakes/sweet baked goods, companies reformulating products will need to reassure consumers

### Made to Order Smoothies - US

“Smoothies are a healthy menu item staple, and their popularity is continuing to grow. With more smoothie choices than ever for consumers to choose from, operators must target specific occasions and offer ingredients with strong functional claims to stand out from competitors, including retail. Moving beyond a one-size-fits-all approach and ...

### Attitudes Towards Casual Dining - UK

“Gone are the days of restaurants operating with a one-size-fits-all business model. Brands have to decide if they want to go back to basics and provide intimate dining experiences for older diners or become a ‘third space’ for young people to hang out over food and drink.”

– Trish ...

### World Cuisines - UK

“Recipe promotions for world cuisine dishes with all the ingredients located together in-store are a highly attractive proposition for shoppers. These will encourage experimentation while tapping into consumers’ desire to become more knowledgeable about world cuisines. Inspiration for meals which are authentically healthy, good value for money and meat-free/vegan ...

### Online Grocery Retailing - UK

“Online grocery is still one of the fastest-growing channels of the grocery retail sector, but growth slowed for the third consecutive year in 2018. The number of users is plateauing as retailers struggle to engage new

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that the taste and indulgent aspects will remain unaffected. That many people find shop-bought cakes too sweet however suggests opportunities for new products with inherently lower-sugar recipes ...

customers onto services that are still predominantly targeting big-basket shops in a period where ...

### Baby Food and Drink - UK

"Nowadays, companies are expected to do the right thing and caring about the environment is on the priority list. A focus on steps to address concerns over the environmental impact of packaging will ensure that more environmentally-conscious parents continue to buy into the baby food and drink category."

- Amy ...

### Healthy Dining Trends - US

"Americans' attitudes toward healthy dining are continuing to evolve as diners seek a balanced approach focused on wholesome, real ingredients rather than low-calorie options. While this interest in fresh ingredients is universal, diners' dietary preferences are growing more diverse, reflective of their life stage and personalized nutrition needs. Younger generations ...

### Sports, Nutrition and Performance Drinks - US

MULO sales of sports, nutrition and performance drinks have steadily recovered. However, factors that likely contributed to those losses continue to put pressure on the market. Increased competition from functional beverages in other categories, along with mounting distaste for artificial ingredients, are obstacles to major growth. Cleaner formulations, enhanced functionality ...

### Bottled Water - UK

"Out-of-home consumption underpins much of the usage of bottled water, but the market is at risk from people opting more for filling bottles with tap water. Efforts to reduce sugar have helped sales of bottled water, but concerns about plastic waste could dampen future growth."

- Richard Caines, Senior ...

### Salty Snacks - US

"The popularity of snacking has benefited all of the salty snacks segments and contributed to sales gains of 4.8% in 2018. While continued growth is projected in this \$18 billion market, a slower growth pace is projected through 2023. The strong demand for snacks has resulted in increased competition ...

### Specialist Food and Drink Retailers - UK

"Specialists have enjoyed two years of growth, helped by high inflation in 2017 and a return to growth in real wages in 2018. However, growth is forecasted to slow in the coming years and cost and convenience continue to be barriers to usage. Therefore it is important that specialists look ...

### Convenience Store Foodservice - US

"C-store foodservice sales reached an estimated \$39.2 billion in 2018, up 33.2% from 2013. While c-store foodservice experienced strong growth in the past, Mintel forecasts growth will start to slow, with sales reaching an estimated \$48.1 billion by 2023."

- Jill Failla, Foodservice Analyst

### Packaged Red Meat - US

"Health and environmental impact issues continue to pose challenges to the category, but despite that, red meats remain solidly entrenched in consumer diets. Sales for red meat made modest gains, with beef driven mostly by price increases and declines with pork, triggered by overproduction. Adjusted for inflation, the category is ...

### Savoury Biscuits - UK

### Gum, Mints and Breath Fresheners - US

## Food and Drink - International

“The dependency on evening snacking for usage has left savoury biscuits vulnerable to competition from other snacks vying for the same occasion. Inspiring people to explore toppings other than cheese and to use savoury biscuits in different ways is needed to build usage for other meal occasions. As recipe suggestions ...

“Sales of gums, mints, and breath fresheners have been essentially flat over the past five years and, when adjusted for inflation, are expected to drop 14% off of their 2018 sales by 2023. The consumer base has shown no discernible growth over that time, and brands have largely confined their ...

### The Leisure Outlook - UK

“Consumers spent cautiously over the Christmas and New Year season of 2018/19 despite having money left at the end of the month. Yet the promise of spring looks strong, partly due to people’s plans for the coming quarter, which should help the leisure sector rebound from the recent lull ...

## February 2019

### Potato and Tortilla Chips - US

“The potato and tortilla chip market continued to enjoy steady growth even as the market place grows competitive. Consumers exhibit a tendency to stick to familiar brands and tastes and to see chips as an indulgence which may be a challenge to market expansion. Opportunities lie in flavor, functionality, and ...

### Ethnic Restaurants and Takeaways - UK

“With many consumers continuing to take a cautious attitude towards spending, it comes as little surprise that there are high expectations on ethnic venues to justify their value by offering something tangibly different, including dishes deemed too complex to make at home or ones which focus on highly skilled cooking ...

### Snack, Nutrition and Performance Bars - US

“Consumer interest in convenient food options and an effort to adopt healthier lifestyles have supported category growth. While the likely continuation of these trends is an advantage to bar players, the subsequent growth in other food and drink categories stepping in to meet these needs presents a challenge. Year-over-year gains ...

### Attitudes towards Healthy Eating - UK

“Gut health is widely seen as essential for overall health, however, few people have knowingly eaten foods which support gut health. This points to a lack of awareness of which foods provide this benefit. Products with EFSA-approved claims in this area should therefore look to flag this up clearly on-pack ...

### Pasta, Rice and Noodles - UK

“Tapping into their image as value for money meal options, and giving shoppers more recipe ideas for recreating popular dishes tried in restaurants at home offer high-potential routes for encouraging more frequent usage of pasta, rice and noodles. A greater focus on nutritional claims, such as promoting fibre and protein ...

### Attitudes Towards Home Delivery and Takeaway - UK

“Gone are the days when consumers ‘just accept what they are given’. They’re finding their voice to ask for exactly what they want. Personalisation and customisation is now a prerequisite for many ordering home delivery/takeaway food.”

– Zameira Hersi, Leisure Analyst

## Food and Drink - International

### In-Store Bakeries - US

"Sales for in-store bakeries continue to grow steadily, reaching nearly \$13 billion in 2018 and expected to hit \$14.5 billion by 2023. Amid such growth, there is still potential to expand further, as penetration among consumers is somewhat low (just over 50%). Key for the category will be expanding ...

### Full Service Restaurants - US

"The massive and influential FSR (full service restaurant) segment demonstrates moderate sales growth overall, though it's losing slight share year-over-year to the limited service sector and other growing threats, such as retail prepared foods. Within this segment, casual dining and midscale chains are seeing the greatest challenges when it comes ...

### Crackers - US

"Cracker sales have remained relatively flat hovering near \$7.7 billion since 2016. While the category's versatility and consumer interest in snacking have helped maintain nearly universal penetration, intensified snacking competition has stolen some share of occasions from brands in the category, especially with adult consumers. While families and kids ...

## January 2019

### Beverage Blurring - US

"Category-defying hybrid drinks have been at the heart of much growth and innovation in the non-alcoholic beverage market. While just 13% of US adults overall report drinking hybrid beverages, the most engaged consumers – iGens, Millennials, parents, and Hispanics – are often young and influential. Further, these key consumer groups ...

### Crisps, Savoury Snacks and Nuts - UK

"Snacks are one area where health priorities take more of a backseat for consumers. In light of the government expectations of calorie reductions, this poses a notable challenge to the category. Brands looking to explore a better-for-you positioning in line with government goals need to ensure products deliver on taste ...

### Fast Casual Restaurants - US

"The fast casual restaurant segment continues to experience steady sales growth fueled by diners' interest in high-quality ingredients and better-for-you menu options in an accessible format. However, as restaurant segments blur with full service restaurants offering more convenient ordering options and fast food restaurants offering more premium ingredients, fast casuals ...

### Alcoholic Drinks Review - UK

"Drinks makers are continuing to cater to consumers moderating their alcohol intake through a raft of low/no-alcohol versions, ensuring that they can keep buying into the market even as they seek to curb their drinking.

"Related to this desire to drink less, some consumers are looking to choose higher-quality ...

### Still and Sparkling Water - US

"Consumer interest in health and wellness paired with innovation occurring in the water market is pushing sales of packaged water to new highs. Sales of packaged water are projected to reach \$24.4 billion by 2023, driven by increases from all water segments, especially the fast-growing sparkling segment. Consumer interest ...

### Health Management Trends - US

"The health and wellness market has grown from an industry to a culture, expanding the definition of what it means to be healthy in more holistic terms. All adults report doing something for the benefit of their health and wellbeing so brands have an opportunity to connect with consumers to ...

### Sugar and Gum Confectionery - UK

"The price-sensitivity of the sugar confectionery market and the powerful influence of price promotions present a real challenge to mainstream players. This puts the onus on operators to create even more compelling – and importantly unique – reasons to buy products. Positively,

## Food and Drink - International

there are a number of largely untapped opportunities in ...

### Menu Trends - UK

"It is clear that people are paying attention to their health when eating out-of-home. But the conversation about healthy eating is ever-changing, especially when people's knowledge on how they should eat right is continually being undermined by the latest fad diets or lifestyle choices. Promisingly, current diners have shown ...

### Snacking Motivations and Attitudes - US

"95% of US adults snack daily, and 70% do so 2+ times per day, making snacking a huge opportunity for connecting with consumers. The percentage of "super snackers" (those who snack 4+ times per day) is increasing, and the fact that busy lifestyles result in the skipping of meals (or ...

### Snacking in Foodservice - US

"Americans love to snack, with increased usage being driven consumers' busy schedules, interest in health, and eating on-the-go. This represents a robust opportunity for operators to cater to this eating occasion by offering craveable, affordable, and portable options. LSR (limited-service restaurant) operators are in an excellent position to capitalize on ...

### International Food Trends - US

"International food adoption is a fairly slow process in the US, which prizes traditional Mexican, Italian, and Chinese fare above all else. However, factors are positioning international fare for continued future growth, including an increasingly diverse population that favors such cuisines; the need for restaurants and products to differentiate and ...

### Cider - UK

"Barrel-aged ciders appeal particularly to over-55s, making these variants a promising means for companies to maintain engagement among older consumers. As well as tapping into quality associations around longer ageing, these products would also offer a less sweet flavour profile, which is likely to be particularly welcome to older people ...

### Private Label Food and Drink Trends - US

"After years of steady growth, sales of private label food and drinks may have reached their peak. Economic indicators suggest consumers are poised to increase their food/drink budgets, which will offer a challenge for value-oriented store brands. A strength for private label is fresh products – like meats, poultry ...