

### January 2013

#### Ready Meals - Ireland

The ready meals category within Ireland is experiencing growth led by the popularity of ready-to-cook products and increasing product development within chilled ready meals. However, the category still suffers from an unhealthy image and as Irish consumers become increasingly concerned about their health, future growth within the category will centre ...

### December 2012

#### Table Sauces and Seasonings - UK

“With the burgeoning number of over-55s, healthier formulations present a viable means for brands for generating standout among these older age groups. They are significantly more likely than younger cohorts to see low fat, low salt, low sugar and being free from artificial additives/preservatives as important considerations when choosing ...

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

“More than six in ten diners state that price promotions would encourage them to try a new restaurant, highlighting the unsurprising appeal of discounts as consumer budgets remain under pressure. However, a similar percentage states that recommendations from friends/family would make them more likely to visit, suggesting that using ...

#### Non-chocolate Confectionery - US

“The non-chocolate confectionery category is in a position to drive perceptions of the healthfulness of product offerings, and to suggest responsible category participation, rather than suffering from consumer flight due to health concerns.”

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

#### Pizza Restaurants - US

“Pizza restaurants have adapted well to the changing needs of consumers with a product that hadn’t been altered a great deal since it became a mainstream cuisine option. Concepts are entering into the fast casual arena with the help of new technology to give consumers personal made-to-order items with upscale ...

#### Beer - US

“Domestic and imported beer brands continue to dominate the U.S. beer market despite a tumultuous beer period brought on by the economic downturn. While some beer segments have adapted to appeal to consumers throughout the recession, the overall beer market has declined since 2008. In addition, some consumers exchanged ...

#### Sugar and Gum Confectionery - UK

“Sugar confectionery is hardly on a blacklist of harmful foods... yet this isn’t to say that sweets with healthier recipes hold no appeal. This report highlights opportunities to tap into a consumer interest in sugar confectionery with a better-for-you positioning. A hefty 61% of sweet users claim that there are ...

#### RTD Smoothies - US

“The RTD smoothie category is characterized by low market penetration, especially in comparison to that of made-to-order smoothies. The good news for RTD

## Food and Drink - International

“When it comes to gum, mints and breath fresheners, flavor remains the most important attribute consumers are seeking. However, an increased consumer desire for getting a benefit from everything they ingest has raised a demand for functional benefits. Therefore, while some strides have been made in this area, manufacturers need ...

### Consumer Snacking - UK

“NPD that focuses on flavour innovation can offer brands stand out in the highly competitive snacking market with half of consumers who snack agreeing that they like to try more exciting flavours in snacks.”

smoothie makers is that they can use the heightened consumer exposure to smoothie brought about by the popularity of fast-food smoothies to increase consumer awareness of RTD ...

### Beer - UK

“Drinkers are increasingly looking for pubs to make imaginative choices with their range of drinks and those which stick to safe options of just mainstream brands are likely to struggle to win over beer enthusiasts.”

## November 2012

### White Spirits and RTDs - US

“With volume sales of 6 million 9-liter cases, the RTDs segment is the smallest in the category. This can be attributed in part to the relatively new nature of these products, compared to the longstanding white spirits options. Declines seen in the segment are likely due to rising concerns over ...

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

“The dominance of the major food retailers is still developing. Their offer is being refined – both in store size and product offer. There is still scope for growth in non-foods and services and the next decade will see all the majors seek to enhance their store portfolios and the ...

### Attitudes Toward Kids' and Teens' Snacking - US

“While kids still favor indulgent snacks and many buy their own, increasing efforts by all levels of government to encourage more healthful eating habits, coupled with parents' desires to feed their children healthier foods, are continuing to put pressure on manufacturers. Therefore, by proactively developing new products with healthier nutritional ...

### Family Midscale Restaurants - US

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

This report series covers the 19 leading economies of Western Europe. In total these countries account for around 95% of all European retail sales, excluding Russia. The remaining ten countries are either too small (e.g. Luxembourg) or are not sufficiently well developed to warrant detailed coverage (e.g. Romania ...

### Sandwiches and Lunchtime Foods - UK

“Product innovation based around added-value attributes (eg contains one of your five-a-day) and an offering differentiated from at-home foods should help operators to better compete with packed lunch options. A focus on fresh products offers one avenue of exploring such differentiation, also coming across in the consumer research of this ...

### Poultry - US

“Nearly half of respondents say they would like to see more recipes on poultry packaging, but such interests might be better served if healthy recipes were offered at point of sale. This entails brands cooperating with retailers.”

### Diet Trends - US

## Food and Drink - International

“Family midscale restaurants offer a sit-down experience at low prices with menus that tend to have something for everyone. However, over time, this segment has lost some excitement and is currently facing competition from segments with better pricing, more upscale items, and better overall dining experiences. Health initiatives, value, and ...

### Craft Beer - US

“Beer drinkers younger than 35 have come of legal drinking age during a time when craft and craft-style beers have become commonplace in the market. Yet, with another 1,200-plus breweries in planning, an already crowded landscape is at risk of becoming overpopulated. Even the most dominant craft and craft-style ...

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

“Health remains an issue within the soft drink category, with potential to drive value sales in the market. For example, almost three in five smoothie drinkers agree that they are willing to pay more for a drink with higher fruit content, while a third agree that it’s worth paying more ...

### Premium Alcoholic Drinks - UK

“Premium brands would be ill-advised to follow a strongly promotional driven strategy as a means of appealing to more drinkers. However, this is not to say that they should not promote at all in order to preserve their exclusive status, as infrequent price cuts are undoubtedly an effective way of ...

### Snack Foods and Confectionery - Ireland

The advertising of snack foods and confectionery is a key issue that engenders plenty of lively debate in Ireland, particularly where children are concerned. Critics of such advertising, such as the Irish Heart Foundation and Royal College of Paediatrics and Child Health, have called for a complete ban on the ...

“The diet industry is expected to do well in light of the current obesity epidemic. However, with sales of certain products down, consumers are turning to products that provide long-term wellness solutions rather than a quick fix. Diet brands poised to help consumers make lifestyle changes will be effective.”

### Dieting Trends - UK

“Despite rising levels of obesity and the large swathes of the population who are trying to lose weight, the diet and weight control food market is stagnating. Although the overriding perception that ‘light’ products are overpriced is undoubtedly limiting their appeal, consumers’ scepticism over their healthiness is also a major ...

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

“With the number of over-65s set to rocket, healthier recipes present a viable means of generating usage among these older age groups. They are significantly more likely than younger cohorts to see low salt and low sugar as important considerations when choosing a cooking/pasta sauce.”

### Grocery Retailing - Ireland

The grocery market within Ireland is increasingly being dominated by UK food multiples and European food discounters. In addition to this, changes to the planning guidelines regarding the cap on the size of supermarkets within RoI have increased, putting even more pressure on convenience and independent stores due to larger ...

October 2012

### Meat, Seafood and Poultry - UK

### Home Baking - UK

## Food and Drink - International

“Over half of buyers (58%) rank ease of preparation as one of their top five priorities when buying meat, seafood or poultry. A further 47% consider ‘quick to prepare’ a leading priority, demonstrating how a convenience-led proposition can appeal to consumers even at a time when incomes are under pressure ...

### Exercise Trends - US

“The recession caused many Americans to reevaluate how they were spending their money. One of the things to be cut was usually gym memberships or workout plans. Consumers adopted ways to save money on fitness and have carried these practices through into recovery. Additionally, consumers continue to seek new and ...

### Coffee Houses and Donut Shops - US

“As the economy rebounds, are consumers returning to their pre-recession ways or do operators need to create a new, more compelling reason to get consumers to unplug the home coffee maker? Operators are turning their attention from their core coffee/donut business to be all-day dining options. Also, while different ...

### Cheese - UK

“Even though promotions can be an effective means of encouraging trialling, established cheese brands should look to shift towards a model based on justifying their everyday pricing by building engagement with users through focusing on the quality of their products via NPDP and communication.”

### Coffee - US

“Tremendous potential lies in appealing to the 18-24 year old group of consumers who are more adventurous in their coffee drinking habits. Marketers should take inspiration from the nearly insatiable curiosity about new coffee types, beverages, brands, and flavors exhibited by younger consumers and translate that energy into new marketing ...

### Cordials and Squashes - UK

“The economic downturn may have kick started the revival of baking, as consumers started to prioritise home-based activities as part of their efforts to cut costs. However, it is clear from the enthusiasm of young, aspiring bakers that this has become much more than a means of economising. The finding ...

### Contract Catering - UK

“With consumers continuing to cut back on areas of secondary expenditure, the lunch market is more vulnerable than dinner occasions which benefit from associations with ‘experience’ and leisure. As such caterers have to balance the contrasting demands of employers looking to cut costs and reduce risks with the need to ...

### Fish and Seafood - US

“In order to increase the frequency of consumption of fish at home, manufacturers and retailers do have an opportunity to better compete with restaurants by introducing more premium offerings and emphasizing quality. At the same time, highlighting specific nutritional attributes that would benefit adults and children alike could be another ...

### Soft and Low-alcohol Drinks in the On-trade - UK

“Much of the responsibility for boosting food and drink matching sits with the pubs themselves: clearer menu information on soft drinks, better positioning on bar displays to boost visibility and awareness and recommendations from bar staff are all potential means for on-trade establishments to tap into this lucrative market.”

### Cooking Enthusiasts - US

“Cooking at home is an activity that many Americans have accepted as a part of their weekly routines. However, despite being interested in taking an experimental approach to cooking, most are likely to stick to what they know. The key to increasing overall enthusiasm for cooking is likely to lie ...

### Wine - US

## Food and Drink - International

“40% of over-65 squash/cordial buyers agree that fruit squash tends to taste too sweet compared with a 26% average. Therefore, reducing the sweet flavour of squash by lowering sugar or sweetener content, or even upping the level of tarter flavours, could better suit the palates of this lucrative group ...

### Red Meat - US

“While demand for beef is slowly waning, producers may be able to drive sales by making greater efforts to show how lean beef and pork can be paired with vegetables, high-fiber grains, and other nutrient-rich foods to create healthy and well-balanced meals. Some also can work to frame beef as ...

“Across the board, consumers aged 21-24 are more likely than average to consume wine, and are more likely to do so with high frequency. This is a plus for the category, which may see growth down the line, given that this group has the most years of buying ahead of ...

### Fast Casual Restaurants - US

“The competitive foodservice landscape emphasizes a few key issues that face fast casual operators. To begin with, the number of fast casual concepts entering the market has forced operators to seek greater differentiation. As such, there’s a range of service styles within the fast casual realm, which is causing confusion ...

## September 2012

### Yellow Fats and Edible Oils - UK

“Differentiating yellow fats and oils products from competitors in a way tangible to consumers is arguably challenging, given the nature of the product, seeing packaging play a key role in differentiation. Developing or simply actively communicating usability attributes could offer brands standout in the segment.”

### Organic Food and Drink - UK

“In times where consumers are more value-conscious than ever, the overriding perception that organic produce is overpriced has undoubtedly been at the heart of its demise. But the question marks surrounding what the organic label stands for are also a major barrier. This indicates that greater transparency is needed to ...

### Sports Drinks - US

The estimated \$6.3 billion 2012 sports drinks market was a casualty of the recession and its economic aftermath as consumers switched to lower-priced brands or left the market entirely. The advent of diet sports drinks has helped to drive sales since their introduction in 2009 and growth in this ...

### Sandwiches, Subs and Wraps - US

Despite the recession, the sandwich shop segment has fared well, meeting the changing needs of consumers. Sandwich shops offer better-for-you and gourmet-like options, as well as upscale décor at lower prices than full-service restaurants, striking a balance between quick service and casual dining. These concepts also meet busy on-the-go consumers ...

### Vitamins and Supplements - UK

“When it comes to health and wellness today’s information-driven consumers seek advice from a number of quarters but it is recommendation that carries the highest weight influencing purchase of vitamins and supplements amongst six in ten users. With personal recommendations, or those from experts, being the biggest driver for buying ...

### Quick Service Restaurants - US

The recession and subsequent years have had a significant impact on the quick-service (QSR) segment, for both operators and consumers. Value pricing initiatives have kept patrons engaged, but consumer demand, media attention, and the constant threat from competing segments have at the same time driven the fast food industry to ...

### Online Grocery Retailing - UK

### Dark Spirits - US

## Food and Drink - International

“If our recommendations for the rollout of in-store and drive-through collection are implemented by major grocery chains, then their store estates – including c-stores and hypermarkets respectively – become indispensable for fulfilling online orders.

### Bread - US

Retail sales of bread and bread products are expected to reach nearly \$21.6 billion in 2012, making it one of the largest food categories in the U.S and one that is critical to both retailers and manufacturers around the nation. However, it is also one of the most ...

### Breakfast Foods - US

The estimated \$12.5 billion breakfast foods category has experienced positive performance in recent years, posting gains of 19.5% in dollar sales from 2007-11. The category has likely benefited from an increased convenience factor, coupled with a strong private label presence and aggressive product innovation, at least in some ...

### Sugar and Sweeteners - US

The sugar and sweeteners market has fared well during the volatile economic climate of the past five years, mainly carried by the market's leading segment: sugar. In spite of the national focus on health and obesity, sugar sales have not suffered. However, the obesity epidemic, along with interest in all ...

### Ethnic Foods - UK

"British food has long been spurned by the world as being bland and stodgy but the tastebuds of the nation are becoming more adventurous, with over two fifths of ethnic food users continually on the lookout for new and interesting cuisines. Patak's even launched a branded phal – generally the ...

The dark spirits category is expected to reach an all-time high of \$21.4 billion in total U.S. 2012 estimated sales. The fact that this was accomplished following one of the worst recessions in the country's history makes the accomplishment all the more impressive. However, growth was not all ...

### Burger and Chicken Restaurants - UK

“Weak brand loyalty and consumer promiscuity continue to dog the chicken/burger bar market with a need for operators to adopt similar strategies as their fast casual competitors in terms of using lifestyle branding techniques to increase their relevancy to specific consumer groups.”

### Vending - US

In the coming years, growth in the U.S. vending industry will likely depend on manufacturers' and retailers' ability to develop technologically innovative machines and expand product offerings to include more novelty foods, as well as non-consumables. Cold beverages, candy and snacks continue to drive sales in the food and ...

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

“The sizeable group of health-conscious consumers are ripe for targeting through vegetarian/meat-free foods and meat substitutes, possibly along the lines of ‘stealth health’, encouraging families to swap a meat-based meal for one that is vegetarian and therefore better for them.”

August 2012

### Wine - UK

### Attitudes towards Family Dining - UK

## Food and Drink - International

“There is marked potential for lower-alcohol wines to grow provided they are able to offer a product which compares favourably with standard-ABV wines while undercutting them notably on price and calorie content.”

“With a wealth of in-home/retail food innovation aimed at children, which is designed to achieve multiple goals (eg appeals to both parents through nutritional claims as well as children through character merchandising), foodservice operators need to up their game in terms of separate children’s menus/products.”

### Condiments - US

Sales of condiments grew by 15% from 2007-12 (4% when adjusted for inflation), with the sharpest jumps coinciding with the onslaught of the recession. The category saw sales increase by 5.6% in 2008 and 6.2% in 2009. This is a clear indication that condiment sales can sustain periods ...

### Convenience Stores - US

Mintel’s proprietary research finds that overall usage of convenience stores is far-reaching, and frequency of visits is high. However, challenges exist for industry players to establish brand loyalty. A highly fragmented retail landscape and a potluck-style product mix contribute to the common consumer perception that convenience stores are “all pretty ...

### Breakfast Cereals - UK

“The breakfast cereals market has remained largely unchanged in terms of packaging for decades. Yet with almost eight in ten consumers interested in buying a cereal with resealable packaging there is considerable unmet demand for packaging solutions which will keep cereals fresher for longer. There is an opportunity for cereal ...

### Yogurt and Yogurt Drinks - US

While sales in a variety of CPG categories declined in response to the economic downturn, the yogurt category has proven to be quite resilient. U.S. retail sales of yogurt drinks reached nearly \$6.4 billion in 2011, up 31% from 2007.

### Sports and Energy Drinks - UK

“With around three in ten consumers sceptical that sports and energy drinks ‘do what they claim’ the market should take inspiration from the cosmetics industry in terms of proving the science behind the functional claims, helping to justify the category’s position as a more expensive product and alleviate any concerns ...

### Innovation on the Menu: Flavor Trends - US

While a restaurant may operate for months, years, and decades on end, the menu rarely stays the same. Flavor preferences and trends come and go, and consumer expectations change with them. Indulgence is important on one hand, but with growing nutritional awareness and pending menu-labeling regulations, offering better-for-you (BFY) items ...

### Prepared Cakes and Pies - US

U.S. sales of prepared cakes and pies have weathered the recession and slow economic recovery with steady growth between 2007 and estimated 2012 levels. Consumers apparently have found a degree of comfort in RTE cakes and pies even as they limited spending on many other items. Still, the effect ...

### Nuts and Dried Fruit - US

The \$7.2 billion dollar nuts and dried fruit category fared well during the recession and beyond, posting a gain of 36.1% in dollar sales from 2007-12. The category has likely benefited from the health perceptions associated with it, as well as constant innovation and a strong private label ...

### Casual Dining - US

Mintel’s consumer survey finds that 52% of respondents visited a casual dining restaurant for lunch and 69% of

### Dark Spirits - UK

“Many women (and men) are currently being asked to make the large jump from non-users into a market with



respondents visited a casual dining restaurant for dinner in the last month. Party size and check average varied by daypart with lunch bringing in an average of \$12.66 per person, while ...

## Pizza - UK

“There does seem to be room in the market for healthier lines but manufacturers must be careful how to market the healthiness. Considering pizza’s strong image as a treat, overtly marketing a new line as low fat or low-calorie may position it too far from anything resembling temptation to succeed ...

## Spanish Consumer Lifestyles: Food and Health - Spain

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – Spain, Italy, France, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country and identify and explore specific consumer segments based ...

## July 2012

## Yogurt and Desserts - UK

“As three in four adults overall have eaten desserts, future growth relies on expanding usage beyond the core occasion after an evening meal. Around one in four dessert users note choosing other treats instead of desserts on the grounds of convenience, highlighting for example packaging and portionability as a potential ...

## Home Shopping - UK

“The days when home shopping was distinct from store shopping are over. It’s only analysts who try to make the distinction. For everyone else it is just shopping. And shopping is changing rapidly. If there is one clear message of this report it is that home shopping and store shopping ...

## Tea and RTD Teas - US

## Food and Drink - International

a demanding image and taste profile. Providing these potential users with a path of progression into more sophisticated whiskies, an approach used effectively by Johnnie Walker in the US, should help ...

## Italian Consumer Lifestyles: Food and Health - Italy

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – France, Italy, Spain, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country and identify and explore specific consumer segments based ...

## German Consumer Lifestyles: Food and Health - Germany

This is the first in a twice-yearly series of reports that analyses consumer data from four European countries – France, Italy, Spain, Germany – and forms part of the European Consumer Lifestyle series. The analysis will focus on consumers from each country, and identify and explore specific consumer segments based ...

## Eating Out Review - UK

“Eating out operators need to ensure that their new menu additions stay ahead of the curve by offering tangible points of difference compared to in-home/retail products in order to justify price differentials between in- and out-of-home dining. It would also help venues to play to the rising tide of ...

## Social Media: Food - UK

“The food market is presented with a number of challenges to overcome with regards to engaging consumers online. Despite sizeable communities established by some brands within the market, the majority of consumers remain unwilling to form affiliations with brands, rather engaging only when the opportunity of acquiring a discount or ...

## Baby Food and Drink - UK



## Food and Drink - International

Tea and RTD tea market sales are estimated at \$6.7 billion in 2012. While the market exhibited a healthy growth of 15% during 2007-12, the growth slowed considerably in 2011 and 2012 as the biggest market segment, shelf-stable ready-to-drink (RTD) canned/bottled tea showed signs of stagnation. Additionally, the ...

### Pizza at Retail - US

The \$5.4 billion pizza at retail market had been steadily growing between 2006 and 2009, but started to decline in 2010 and faces more declines for the 2012-16 period. The sluggish U.S. economy has not helped the pizza at retail category. This expected performance, however, will be impacted ...

### Ice Cream - UK

“Marketing single-serve products around the notion of a one-off permissible treat should allow brands and own-label players to appeal to the growing proportion of one-person households who are both short on storage space and are reducing their consumption of ice cream for health reasons.”

### Alcohol Consumption at Home - US

With total U.S. sales of nearly \$86.3 billion in 2011, the market for alcoholic beverages for off-premise consumption has recorded relatively steady growth during the past five years, increasing 5.1% in 2011 compared to 2010's \$82 billion, a 3.2% increase from 2009.

### Champagne and Sparkling Wine - UK

“Champagne now faces the very real risk of losing its strongest USP and association, with improvements in quality and the favourable price comparison of sparkling wine posing additional problems for Champagne brands.”

### Shopping for Groceries - US

For baby, only the best will do. In the last decade the baby food and drink market has evolved unrecognisably – giving parents greater choice than ever before. As a nation of food lovers, parents want to expose their babies to a wide variety of flavours to develop their palates ...

### Smoothies and Shakes: Made to Order - US

Consumers have begun to look towards smoothies, as well as functional smoothies with health add-ins, to fulfill their better-for-you dietary needs and support their on-the-go lifestyle. These items are being consumed as snacks, meal replacements, beverages and desserts, giving the item a great deal of flexibility. The item can also ...

### Healthy Snacking - US

At a time when America's obesity problem is receiving extensive coverage from the media, consumers are becoming more aware of the long-term potential health implications of their eating habits. Unlike some other eating occasions, snacking is most associated with fun and perhaps even indulgence, which can make it challenging for ...

### Ice Cream and Frozen Novelties - US

The ice cream and frozen novelty market, which struggled for positive sales growth in 2009 and lost sales in 2010, turned a corner in 2011 with a 4.1% increase in total U.S. retail sales to reach \$10.7 billion. Sales are expected to increase another 4.1% in ...

### Drinking Out of the Home - UK

“The hassle involved with queuing is a key disincentive to drinking out of home, as 68% of adults who drink out of home agree that queuing is the most frustrating thing about drinking in pubs and bars. This could be remedied by introducing more table-service zones and faster payment methods ...

Total retail sales of groceries sold through supermarkets and drug stores reached \$337.7 billion in 2011 and are expected to reach \$347 billion in 2012. The grocery market saw a slight slowdown in 2009 and 2010 as a result of the recession, yet is positioned to grow annually through ...

### June 2012

#### Energy Drinks and Energy Shots - US

In 2011, Mintel estimates energy drinks and energy shots market sales at \$8.1 billion, which represented a dollar sales growth of 16% over 2010. The market has regained its growth after experiencing a dip in 2009, which could be attributed to the influence of the recession. As of June ...

#### Menu Flavours - UK

“Operators have to be proactive in marketing new menu additions – this means spelling out reasons to purchase as well as communicating what they consist of.”

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

Due to an increasingly on-the-go lifestyle and a tendency toward smaller, more frequent meals, snacking has become a part of consumers’ daily routines. Consumers have become less regimented in their consumption patterns and consume nearly any type of food at any time of day, causing the definition of “mealtime” to ...

#### Cake and Cake Bars - UK

“There are opportunities for cake manufacturers and particularly those within the smaller cakes segment to boost their suitability for sharing by launching products in sharing bags or pouches, which would also improve cakes’ portability and convenience for on-the-go eating.”

#### Attitudes Toward Healthy Food - US

#### Prepared Meals - UK

“The prepared meals sector faces a number of negative health preconceptions, limiting its growth potential. Despite high levels of innovation in the market in terms of recipe reformulation to remove/reduce levels of salt/fat/additives and the launch of new ‘healthier’ products; the majority of consumers remain sceptical about ...

#### Baby Food and Drink - US

The \$5.4 billion baby food and drink category has been steadily declining during and after the recent recession, experiencing a dollar sales drop of 10.3% between 2007 and 2011. Consumer frugality has led many to breastfeeding and feeding their babies and toddlers adult food or made-from-scratch baby food ...

#### Frozen Handheld Food - US

The frozen handheld food market generated \$2.7 billion in total U.S. sales in 2011 and grew by 18% from 2006-11, outperforming many other frozen and non-frozen food sectors. Innovation and renewed interest in the breakfast segment in particular have been driving sales for this market since 2009. However ...

#### The Budget Shopper - US

Popularized during the height of the recession, the term “budget shopper” referred to a consumer who was struggling to make ends meet by scrutinizing costs, weighing out the pros and cons of nearly every purchase, and making spending cutbacks wherever possible. Although the recession officially ended in 2009, consumer attitudes ...

#### Non-alcoholic Beverages at Restaurants - US

## Food and Drink - International

America's collective weight problem and its impact on the country's healthcare system has been well-documented by the media. While some Americans have sought or will seek to improve their eating habits, the country's weight situation is expected to grow even worse. The Centers for Disease Control and Prevention's (CDC) *Obesity ...*

Mintel's proprietary research finds that overall usage of non-alcoholic beverages at restaurants is high, but health trends increasingly shape consumer choice in what they drink. Sugary, high-calorie beverages—particularly those sweetened with high-fructose corn syrup (like carbonated soft drinks)—have been targeted by media, government, and medical communities as a culprit ...

### Carbonated Soft Drinks - UK

"The market must continue to advertise to keep the category front of mind with the consumer and step up innovation of healthier variants including the use of new sweeteners, to keep pace with that in competing categories such as juice drinks, which has increased NPD at a faster rate than ...

### Drinking in the Home - UK

"Exploring NPD positioning cider as a more sophisticated drink, such as vintage ciders and premium products like Aspell's could also help the segment to boost its appeal among older age groups, together with a greater emphasis on food matching."

### Cheese - US

The cheese market, which didn't fare well during the economic downturn, turned a corner in 2011 with a sales increase of 6.1%, reaching total U.S. retail sales of \$18.9 billion. Sales continue to increase in 2012, not only for private label (which benefited most in the sagging ...

## May 2012

### Frozen Snacks - US

The \$1.6 billion frozen snacks market has been steadily growing during and after the recent recession, oscillating with food price increases, suffering to some extent from the unhealthy stigma associated with frozen products, and suffering from a lack of innovation. However, the versatility of frozen snacks, coupled with increased ...

### Bottled Water - US

In 2011, bottled water sales are estimated at \$12.1 billion, which is 3.1% growth in dollar sales over 2010. The market is beleaguered with a number of issues including attrition from some of the key consumer groups such as blacks, Hispanics, and teens; growth of cheaper-priced private label ...

### Dairy Drinks, Milk and Cream - UK

"Strong endorsement of regional products, particularly among higher-earning households, suggests this is a powerful way to engage with users and build loyalty based on provenance rather than price."

### Pub Catering - UK

"There is no doubt that pubs have to work harder to keep up with trends in the wider eating out market in order to stem the decline in visitor numbers. Actively chasing footfall is a must which can be approached through strategies such as targeting specific consumer groups more directly ...

### Lunch Meat - US

### Soup - UK

## Food and Drink - International

Sales in the \$12.6 billion lunch meat category grew by only 1.8% in 2011 (only 0.2% when adjusted for inflation). The slowed growth is likely due to a slowdown in volume sales due to product price increases, a failure of new product innovation to resonate with consumers ...

### Healthy Dining Trends - US

Healthy dining initiatives have come to a head as consumers are demanding greater transparency from restaurants in terms of ingredients, processes, and preparation. These desires have been driven in part by the economy, calorie disclosure laws, wellness initiatives by associations, rising obesity rates and other health problems, as well as ...

### Frozen Meals - US

In 2011, frozen meals generated an estimated \$7.9 billion in total U.S. sales and grew by a microscopic 0.6%. Nonetheless, this was a welcome change from the previous two years of declines. Given the importance of the category to both manufacturers and retailers, both sides will need ...

### Artisan Foods - Ireland

The artisan food market throughout Ireland has the potential to help both NI and RoI recover from the recession. However, increased pressure is being placed on the industry due to an increasingly price-driven consumer who has not got used to heavy discounting within the food retailing sector, along with increased ...

## April 2012

### Specialty Foods - The NASFT State of the Industry Report - The Market - US

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

### Dairy and Non-dairy Milk - US

“There are clear opportunities through which soup manufacturers can encourage usage among the 16-24 age group, such as introducing more soup variants with ‘fillingness’ claims, which should appeal to the 48% of them who would eat soup more often if it filled them up.”

### Bottled Water - UK

“Awareness of the importance of staying hydrated has grown, with more than half of consumers saying that this is an influencing factor when drinking bottled water, either in or out of the home, but there remains a need to remind consumers to increase their consumption.”

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

“Consumers are becoming increasingly savvy about promotions and are aware of what represents value and what does not, something which means that retailers may have to give greater consideration to the specific mechanics and objectives of their promotional strategies.”

### Convenience Stores - UK

“The convenience operations from the major grocery multiples are not traditional c-stores: instead, they are pared-down versions of their superstore offers. For independents, this means there are pressures to compete but there are also gaps in the offer to exploit. The independents must restate the convenience in c-store shopping, providing ...

### Chocolate Confectionery - US

## Food and Drink - International

Milk processors face an uphill battle, including the dominance of private labels; consumer concerns over the presence of growth hormones in non-organic milk; fluctuations in commodity prices; supply shortages for organic milk; and growing consumer concern about the safety of animal products in general. With that long list of challenges ...

Chocolate confectionery posted modest year over year sales growth through the recession to reach \$18.6 billion in 2011. A combination of product innovation and price increases led to a 16% gain in the category from 2006-11. Leading companies expanded their mainstay product lines by way of new formats and ...

### Ethnic Restaurants - UK

Mainstream ethnic operators need to keep up with what the rest of the eating out market place, and smaller, emerging players in the ethnic restaurant sector, are doing in order to remain relevant to consumers. Otherwise the market is in danger of losing even more trade to in-home alternatives and ...

### Cookies and Cookie Bars - US

In 2011, the cookie/cookie bar category returned to positive territory in terms of sales growth, as total U.S. sales reached an estimated \$6.4 billion. The 2.7% increase was a nice improvement from 2010, which saw sales drop by 0.7%.

### Soup - US

Recession-inspired frugality resulting in changing consumer purchase habits has conspired to soften sales in the \$6.4 billion soup industry. After sales declines in prior years, the category showed minimal growth between 2010 and 2011, with sales essentially flat.

### On-premise Alcohol Consumption Trends - US

The restaurant recession appears to be over and patrons are starting to venture out from their homes to visit restaurants and bars once again. Over the past few years, operators have ramped up their beverage programs in order draw consumers back using a variety of strategies, from new drinks, ingredients ...

### Chocolate Confectionery - UK

“Better quality of chocolate, added ingredients (such as fruit and nuts) and ethical sourcing are all potential means for brands to justify higher prices while greater transparency around the reasons for increases in price would also be likely to be warmly received by users.”

### Provenance in Food and Drink - UK

“The strong interest in provenance among the higher-earning households signals the ongoing potential to leverage origin information to justify added value. Emphasising provenance on-pack has potential to appeal to those consumers who are willing to pay more for a British product.”

### Biscuits, Cookies and Crackers - UK

“Another means of reviving the fortunes of the beleaguered healthier biscuit sector is by targeting the under-exploited healthy kids’ biscuits market. A hefty six in ten users with children would like to see more healthy biscuits for children.”

### Coffee - UK

“Newer types of premium instant innovation are important in replacing the jar, which consumers are used to associating with lower prices and brands should look to expand and segment their ranges by introducing sachets, cubes and refill pouches.”

### The Retailing of Food and Drink - UK

“The market for food is changing. We are seeing the beginnings of a shift away from the superstores and towards online retailing and convenience stores. That is not to say that the superstores are in trouble, but the days when they swept all before them are now over.”

### March 2012

#### Attitudes toward Beverage Sweeteners - US

Consumer health concerns are the top factor in shaping their attitudes toward sweeteners. Although obesity rates have nearly stabilized in the past five years at 68%, they still remain high. As a result, more than half of U.S. adults aged 18+ watch their diets and around 60% of these ...

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

The \$5.1 billion dry pasta, rice, and noodles category is diverse, consisting of three segments: dry pasta and noodles, dry rice and rice mixes, and dry macaroni and cheese, all offering consumers a myriad of products that can be eaten as meals, side dishes, or snacks. Sales have fluctuated ...

#### Cereal and Snack Bars - US

Despite minimal growth in 2011, the cereal/snack bar category generated \$3.7 billion in total U.S. sales. Of the two segments—granola bars, and breakfast/cereal/snack bars—granola bars accounted for the largest share of the market with \$2.1 billion in sales for 2011. Breakfast/cereal/snack bars ...

#### Pasta, Rice and Noodles - UK

“Despite the wealth of cookery programmes on the television and internet, the level of knowledge in some of the more basic areas of cuisine is rather lacking in the UK. Just over one in ten (12%) pasta users agree that it is difficult to cook pasta to the correct texture ...

#### Pet Food and Supplies - UK

#### Refrigerated and Frozen Dough - US

The refrigerated and frozen dough market grew by 8.1% between 2006 and 2011. The market grew during the recession, but it faces challenges going forward, including increased competition from bakery products and restaurants as the economy recovers. To maintain the market, dough makers and retailers will need to adapt ...

#### Pet Food - US

In spite of the recession and subsequently slow recovery, consumers continue to dote on their pets, making this category—if not quite bomb-proof—at least able to withstand the shellacking suffered by many other categories. The pet food market experienced sales of more than \$18 billion in 2011, and is projected to ...

#### Pizza and Pasta Restaurants - UK

“One of the key challenges in this market is maintaining engagement with consumers as they age. There is a gap in the market to cater to these less frequent diners who are looking for more special occasion dining opportunities.”

#### Convenience Store Foodservice - US

While convenience stores have offered fresh, prepared foods for years, it's only over the last decade that the trend has accelerated. Today, convenience stores are capturing more dashboard-dining occasions, delivering the benefits of quick, easily accessible, one-stop shopping. Industry players have sought to increase consumer awareness and trust for c-store ...

#### Ethnic Restaurants - US

## Food and Drink - International

“Children have a major influence on the pet food market, and can be an important source of ‘pester power’ therefore it is vital for brands to engage directly with families to maximise their potential.”

Ethnic restaurants have proliferated as Americans’ palates have become sophisticated and diners have sought out new flavors and experiences. Italian, Mexican, and Chinese cuisines remain the most popular, with more than half of all respondents having visited one or more such restaurants in the past month.

### Attitudes Toward Fiber and Digestive Health - US

Studies have consistently shown that most Americans do not eat the recommended daily allowance (RDA) of fiber. According to many studies, high-fiber diets can promote cardiovascular health and help one lose weight, both of which are important to millions of Americans. Indeed, it is becoming increasingly clear that fiber provides ...

### Private Label Food and Drink - UK

“Brands remain the most widely used type of product (89%) and outperformed the own-labels in terms of sales in 2011. However, consumer sentiment indicates that brands may in fact be most at risk in 2012 with own-labels well placed to benefit from a growing pool of users.”

### White Spirits and RTDs - UK

“The new types of RTD have revived a flagging market and could potentially lead the overall RTD market back to the £1 billion mark. Its main obstacles at the moment are that people are put off by the lack of freshness inherent in this product and that – for older ...

### Sweet and Savoury Spreads - UK

“With almost half of consumers enjoying trying new flavours/varieties of sweet spreads and more than two fifths of consumers agreeing that own-label savoury spreads taste just as good as branded, flavour innovation can help to maintain engagement by refreshing this long-established and traditional category.”

### Consumers and The Economic Outlook - Quarterly Update - UK

The report includes an overview of the changes in household well-being over the last three years, a breakdown of planned and recent spending, and consumers' assessment of how well they manage their money. Free to Mintel Oxygen subscribers, the report is the third in an ongoing series of quarterly updates ...

### Carbonated Soft Drinks - US

The carbonated soft drinks market suffered a sales decline in 2011, as two of the three segments that comprise the market exhibited a poor performance. During 2010-11, the largest segment, regular soda, declined by 2% while the second-biggest segment, diet soda, fell by 2.1%. Soda is the most-consumed nonalcoholic ...

### Dairy Products - Ireland

With food prices increasing and consumer spending power remaining low, the Irish dairy category is faced with an increasingly challenging operating environment. However sales are still being driven forward by a demand for healthy products.

### Foodservice - Ireland

The all-Ireland foodservice market has been in continual decline since 2008 due to the impact of the recession. The Restaurant Association of Ireland (RAI) reported that around 700 restaurants and coffee shops closed down between 2009 and 2011 as a result of the economic crisis.

**February 2012**

### Nutrition and Energy Bars - US

### University Foodservice - US



## Food and Drink - International

While sales of many consumer products have seen declines in sales due to the poor economy, this has not been the case for the nutrition and energy bar market. While not entirely recession-proof, this sector has shown itself to have staying power even in the light of continuing economic woes ...

### Attitudes Toward Sodium - US

It's no secret that demand for better-for-you (BFY) snacks, prepared foods and beverages is on the rise. Companies around the globe are reformulating old products and bringing new ones to market to satisfy changing consumer preferences. While low and reduced-calorie products are at the forefront of this shift, concerns about ...

### Cider - UK

“Consumer research shows that drinkers like one or two ciders but view it as too sweet to drink all night. However, there are a number of ways around this: promoting dry ciders alongside sweeter variants and smaller, more concentrated serves.”

### Tea and Other Hot Drinks - UK

“The current crop of loose leaf teas, including Twinings and Yorkshire Tea, are far from youth-oriented. Therefore, running youthful, contemporary-styled ad campaigns of loose tea products provides an opportunity for manufacturers to encourage demand among this group.”

### Coffee Shops - UK

“Consumers remain committed to eating out and coffee shops additionally benefit from being seen as an ‘affordable treat’. However, with stagnant salaries and the increasing cost of living, consumers’ spending capabilities have been curtailed, meaning that 2012 is likely to be as tough on operators as 2011.”

### Cereal, Energy and Snack Bars - UK

“Cereal bars are one of many markets which are perhaps failing to fully leverage this value-added angle. Satiety, energy and all-natural ingredients provide three of the

The face of university foodservice is changing as managed service and self-service providers raise the bar to meet the demands of an increasingly diverse student body, and one that has come to expect a higher level of service than generations past. This has created a challenging marketplace of increased competition ...

### Breakfast Cereals - US

The breakfast cereal market generated an estimated \$10.2 billion in total U.S. sales for 2011. While the market is substantial in size, the most pressing concern for marketers is that it has been in decline since 2009. This is due in part to the fact that with a ...

### Fruit and Vegetables - US

Fruits and vegetables, whether fresh, canned, or frozen, are in the national spotlight as an important component of improving and maintaining health and curbing obesity. This may be the reason that the fruit and vegetable industry has been a growing category in retail channels, in spite of tough economic times.

### Breakfast Restaurant Trends - US

Breakfast has been a notable trend in the restaurant industry as operators have either added breakfast platforms or revitalized breakfast offerings to counter declines in traffic and tepid consumer spending. Mintel Menu Insights shows a 24.2% increase in number of breakfast menu items available from Q3 2009 – Q3 ...

### Fruit and Vegetables - UK

“As food waste has become a primary concern for consumers and industry alike, companies can benefit from working together with consumers to avoid waste and cut costs.”

### In-Home Meal Occasions - UK

“More than four in five consumers say that they enjoy spending time with their family, indicating that marketing products, services and entertainment around this notion of family time should therefore resonate with the majority of consumers.”

potentially most lucrative attributes which resonate with cereal bar users.”

### Beer and Cider - Ireland

Alcohol consumption levels within Ireland decreased between 2007 and 2011, leading to an impact on the beer and cider market. In particular the pub trade has decreased in value, with 30,000 jobs having been lost in ROI alone since 2007.

## January 2012

### Gluten-free Foods - US

The retail gluten-free food market has grown to an estimated \$6.1 billion in 2011. While this figure includes all food labeled gluten free (including products that are inherently gluten free such as scallops or tomato sauce), sales of gluten-free food products that are alternatives to gluten-containing, grain-based products (e ...

### Ethnic Foods - US

An increasingly diverse population and more frequent home cooking helped the ethnic food market continue to grow in 2011, reaching nearly \$3 billion in sales. However, the 3.5% growth during this time is the slowest seen in the category over the five years prior. Signs of an improving economy ...

### Home Baking - US

Strong growth in the \$12 billion home baking industry at FDMx in 2008 and 2009 slowed to a halt in 2010 and 2011. Similarly, strong growth in consumer interest in home baking waned slightly in the period, having been driven in recent years in part by a desire to save ...

### Chips, Pretzels and Corn Snacks - US

With a household penetration rate of 97.1%, the salty snacks category is one of the most popular among U.S. households. In 2011, U.S. sales of potato chips, tortilla chips, pretzels and corn snacks amounted to \$13.6 billion, illustrating the relative recession-resistance of these snack segments. As ...

### Fruit Juice and Juice Drinks - US

The fruit juice and juice drinks market grew by 1% in 2011, which is an improvement on the 1.7% decline witnessed in 2009 and no gain (0%) in 2010. Nevertheless, the market remains challenged with a number of issues, the foremost being juice and drinks' high calorie status, which ...

### The Drug Store Shopper - US

Retail sales at drug stores grew by 3.6% in 2011, reaching \$230 billion, and are expected to increase by a further 5% in 2012. Growth is driven by the aging population, rising levels of obesity and obesity-related illnesses and conditions such as diabetes and heart disease. As these groups ...

### Leisure Venue Catering - UK

“Leisure venue catering remains particularly vulnerable to cut backs in consumer spending as it is often seen only as a refuelling exercise. Operators therefore need to enhance the ‘experiential’ element of their catering offer eg by offering highly customisable service formats which add a sense of occasion/‘theatre’ as well ...

### Dining Out: A 2012 Look Ahead - US

In spite of the economic ups and downs of the past year, consumers have found a way to include dining out in their budget, perhaps becoming recession weary and finding restaurants a form of creature comfort. So much the more going forward as the economy begins to pick up.

## Food and Drink - International

### Liqueurs - UK

“Managing a shift in consumer perceptions can also help to change liqueurs from being viewed as old-fashioned by too many younger people. This is partly due to a failure to update the image of the category and capitalise on the category’s rich provenance as something alluring rather than anachronistic.”

### Crisps, Salty Snacks and Nuts - UK

“Price remains the main choice factor in 2011, with consumers increasingly looking to stick to tried and trusted brands and flavours. Keeping crisps affordable in the face of rapidly rising raw material costs is one of the most difficult, but important, challenges facing manufacturers and retailers today.”

### Bread and Baked Goods - UK

“To more effectively compete with own-label, brands need to emotionally engage with consumers, extolling the virtues of their expertise and – in the case of the older bakeries – heritage. But they are likely to struggle to achieve this without a stronger media presence.”

### Food and Drink Packaging Trends - UK

“Three in four consumers state that it is important for brands/companies to invest in sustainable packaging, highlighting how this interest is translating into higher expectations on companies, suggesting opportunities for brands to stand out based on their credentials in this area. This reflects a broader trend identified by Mintel’s ...

### Beverage Packaging Trends - US

The Great Recession and a stuttering economy continue to influence consumer attitudes and behavior, and in turn, trends in the beverage market. According to Mintel GNPD, since the onset of the recession there has been significant new product launch activity in the beverage market driven by innovation in the alcoholic ...