

### January 2010

#### Imported Beer - US

This report focuses on how the imported beer category has changed, particularly in response to the current U.S. economic and social landscape, as well as current trends in beer and brewing. Current economic pressures in the US have motivated consumers to seek alternate choices to higher-priced imported beer.

### December 2009

#### Lunch Meat - US

Since the start of the economic recession in 2007, sales of lunch meat have rebounded thanks in part to an increase in “brown bagging” and “eating in.” In this report Mintel discusses how consumer trends, the economy, and new product trends are influencing the lunch meat market. In addition ...

#### Natural Products Marketplace Review: Refrigerated and Frozen - US

Natural and organic food and drink sales experienced strong growth over the last decade, and in particular in the last five years as mainstream FDM aggressively started stocking natural/organic name and private label brands. The recession has curtailed growth in the short term, and in this report Mintel discusses ...

#### Foodservice and Convenience - US

Depressed consumer confidence continues to plague foodservice industries, as dining out is more frequently perceived as a luxury that can be cut back on. However, restaurants may be able to mitigate the damage of the recession by focusing on the “convenience segment,” those consumers who continue to spend on ...

#### Smoothie Shops - US

Smoothie Shops, as a relatively new concept, have been finding their way in the world, and although they have

#### Sweet Treats - Ireland

In response to increasing demand for data concerning the dynamic economy and growth markets of Northern Ireland and The Republic of Ireland, Mintel has developed a series of reports covering a wide variety of sectors within both of these dynamic regions. Each one provides detailed coverage of key drivers as ...

#### Natural Products Marketplace Review: Shelf-stable Foods - US

Natural and organic food and drink sales experienced strong growth over the last decade, and in particular in the last five years as mainstream FDM aggressively started stocking natural/organic name and private label brands. The recession has curtailed growth in the short term, and in this report Mintel discusses ...

#### Natural Products Marketplace Review: Beverages - US

Natural and organic food and drink sales experienced strong growth over the last decade, and in particular in the last five years as mainstream FDM aggressively started stocking natural/organic name and private label brands. The recession has curtailed growth in the short term, and in this report Mintel discusses ...

#### Attaining Optimal Heart Health - US

The US market for heart health is driven by a range of health factors, primarily other diseases such as hypertension, diabetes, and high cholesterol, as well as the rising obesity rate, cigarette smoking, age, gender, race, and heredity. This report focuses on these drivers and provides analysis of the following:

#### Ice Cream Shops - US

This report explores the ice cream shop market—identifying key developments that are changing

## Food and Drink - International

found niche appeal with younger consumers, this limited market combined with economic and climate woes in the recent past have hindered growth and caused many market leaders to reevaluate their core ...

consumer habits and usage with consideration of the current economic climate and competitive threats.

### Restaurant Beverage Trends - UK

This report assesses consumers' attitudes towards drinks in restaurants and looks at the underlying motivations and influential factors behind consumers' purchasing habits in this area.

### Managing Food Costs - UK

This report looks at the fluctuations in food prices and the impact of these and other recent economic changes on consumers' grocery shopping behaviour, as well as the ways in which retailers and brands have responded to these changes.

### Meals-for-one - UK

This report examines the eating habits of adults in OPHs. No one consumer product market will be examined, however, Mintel will explore a whole range of food products, with reference to how they fit into the daily eating patterns of people living on their own.

### Coffee - US

As the nation responded to recessionary pressures in 2008 and 2009, millions of Americans engaged in subtle lifestyle changes in an effort to maintain a high standard of living, while reducing expenditures. Among the most common lifestyle change is the tendency to spend more time cooking and entertaining at home ...

### Family Dining - UK

This report examines:

### On-trade Soft Drinks - UK

The report focuses on soft drinks bought for consumption in the on-trade, outside of the home.

### Domestic Beer - US

Heightened public awareness of the overweight/obesity epidemic in the US has helped to evolve the domestic light beer segment. The light beer segment reached a 60.8% share of total domestic beer volume sales with 4.4% growth from 2007-08. Meanwhile, the super premium and craft beer segment is ...

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

This report, a companion to *Speciality Foods—NASFT State of the Industry Report—The Market—US, October 2009*, examines consumer attitudes towards, and opinions about, specialty foods.

### Organic Food and Drink Retailing - US

Organic food and drink sales experienced strong growth over the last decade, and in particular in the last five years as mainstream FDM started aggressively stocking organic name and private label brands. The recession has curtailed growth in the short term, and in this report Mintel discusses how consumer trends ...

### Bottled Water - US

The bottled water category faces numerous challenges including the economics of the "new normal" and increased environmental concern, and as a result, understanding market dynamics has become essential to ensure continued success. Opportunities do remain, however, and this report seeks out and finds them. Some of the topics covered in ...

### Food NPD - Europe

### Yogurt - US

## Food and Drink - International

European Consumer Goods Intelligence is a unique series of fmcg market research reports, written by industry experts and incorporating exclusive insight into consumer activity and market trends.

Yogurt sales continue to rise as more Americans become aware of yogurt's health benefits. The U.S. yogurt market reached an estimated \$4.1 billion in 2009 in FDMx. In this report Mintel discusses how consumer trends, the economy, and new product trends are influencing the yogurt market. In addition ...

### Family/Midscale Restaurants - US

This report explores the family restaurant market—identifying key developments that are changing consumer habits and usage of these restaurants within the current economic climate, which has caused “value” to emerge as a key theme as operators struggle to combat declining guest traffic.

## November 2009

### Food Retailing - UK

People want their grocery shopping to be convenient. But, in contradiction of popular myth, most people (85%) don't mind grocery shopping, although 35% admit that they find it a chore.

### Consumer Attitudes to Fine Dining - UK

This report aims to investigate the question: “**Has the recession made fine dining redundant?**”

### Children's Eating Habits - UK

Food and drink manufacturers looking to target their products at children are increasingly using internet advertising. Internet ad is less regulated than other media and children are already responding positively to it: thirty percent of 8-16 year-olds say that they try food or drinks after seeing them online.

### Lager - UK

- Since 2004, lager value sales fell by 11% to reach £11.4bn in 2009. Nevertheless, it remains the largest selling alcohol drink.
- While the trade defines premium lager as having an ABV (alcohol content) of around 5% and above, only one in ten regular lager drinkers think that stronger lager ...

### Pub Visiting - UK

After necessities and bills, going out, such as the pub & cinema, and dining out still remain consumers' top spending priorities.

### Evening Dining - UK

- Two-thirds of adults cook their evening meal from scratch. However, most draw upon a repertoire of meal options that includes take-aways and ready meals.
- Manufacturers and retailers of convenience foods are failing to attract their share of older shoppers, with this group preferring to cook their evening meals from scratch ...

### Breakfast Foods - US

Like a small town high school marching band, the success of the breakfast food market is largely

### Casual Dining - US

With the recession in full swing, the casual dining sector has suffered across the board. Strategy has turned

determined by the widely varying talents of its members. The varying sales of the 10 competing segments combine for flat overall results. This report explores the factors that influence product selection—health and price ...

## Potatoes - UK

- The chilled potatoes sector is showing strong growth, now accounting for 2% of the market. Not only do consumers want potatoes that require minimal cooking, but they are also responding to the health/ freshness position of chilled potato products. Fresh potatoes still account for two-thirds of the market.
- Suppliers are ...

## Food NPD - UK

Innovation is one of the major drivers of the food market and innovation itself is driven by broader social and cultural trends. Two trends – towards convenience and towards healthier eating – have helped reshape the UK food sector over the past decade. UK eating habits have received massive attention ...

## Food NPD - Italy

Italian retail value sales of food reached €122 billion in 2009, growing by almost 1% on 2008. This modest growth reflects how a reduction in prices initiated by the poor economic outlook and the following recession has affected sales. In addition, more Italians are opting for own-labels and discounter ranges ...

## Seasonings - US

Seasonings is a mature market with sales totaling an estimated \$3.6 billion in 2009. Following years of slow growth, sales picked up in 2008-09 as the economy worsened and Americans cut back on eating out at restaurants and began cooking at home more often.

## Vending - US

Vending machines are so much a part of everyday life, they may be overlooked or forgotten by many consumers. However, they offer convenient 24-7 access to beverages, food and a growing number of non-food products, and form a significant \$14.4 billion industry – which is currently adjusting to a ...

## Food and Drink - International

sharply from expanding capacity to stealing share from competitors. Unit counts for leading chains are on the downswing. In this report, Mintel examines the impact of recession on casual dining chains and ...

## Food NPD - Spain

This report examines consumer attitudes towards new product development, buying new food products, and brand loyalty, and looks at the levels of NPD in a number of food markets as well as product positioning claims. The specific markets covered in this report are ready meals, cheese, meat products, fish products ...

## Food NPD - Germany

Although openness towards new products is increasing in Germany, both economic uncertainty and an ageing population which is less willing to experiment, restrict the prospects for new launches. Those who go out to work increasingly find that convenience eating compensates for a lack of free time to cook from scratch ...

## Food NPD - France

Pressures of modern living are forcing more and more French to reluctantly forgo the tradition of cooking from scratch. As a result, the sales of prepared food products are slowly picking up after years of near stagnation. Those that still allow consumers some involvement in preparation have a head start ...

## Wine - US

This report explores the US table wine market. Besides presenting sales data on domestic and imported table wine, the report considers a wide range of topics, including:

## Hotel Catering - UK

Despite the increasing popularity of no-frills/budget hotels during the recession, catering continues to be an important element of the stay for many consumers. Just over 27m people stating that they've eaten breakfast in a hotel in the last three years.

### Budget Shopper - US

The current recession didn't so much start a trend toward budget shopping as intensify one already in place. While belt tightening has been an ongoing process in recent years, the motivations for it have shifted considerably in the past 12 months as the recession has deepened and turmoil in the ...

## October 2009

### Over-55s' Eating Habits - UK

- When shopping for food, two thirds of over 55-year olds are likely to have planned their purchases in advance.
- Consumers aged over 55 are more frequent food shoppers than their younger counterparts who are much more likely to shop once a week or less.
- Almost 5 million over-55yr olds have ...

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

Specialty foods are defined as products that have limited distribution and a reputation for high quality. These items are becoming more popular—and easier to find—as the American consumer has developed a more sophisticated and discerning palate and as a growing number of channels offer foods to attract these consumers. NASFT ...

### Private Label Natural and Processed Cheese - US

In this report Mintel reviews the markets for natural and processed cheese, including the various sub-segments; reviews how private label is performing against branded products; and how the struggling economy of the last couple of years has shifted household purchases. With natural and processed cheese sales in excess of \$10 ...

### Exercise Trends - US

Only a small percentage of Americans meet the Centers for Disease Control and Prevention's weekly recommendations for exercise—150 minutes of moderate intensity aerobic activity for healthy adults plus muscle strengthening two days per week—and this

### Bottled Water - UK

- There is a close relationship between consumer confidence and bottled water penetration and sales. Both fell dramatically in 2007 but have shown signs of recovery in 2009. It is likely that economic caution led consumers to switch to tap water.
- Volume sales of bottled water declined by 11% between 2006 ...

### Pizza Restaurants - US

While the recession is a factor, the pizza restaurant industry faces unique challenges. This report provides market participants the insight needed to understand these challenges, as well as analysis on how pizza operators are adapting to them. Issues raised in the report include, but are not limited to:

### Media and Food (The) - UK

- Health advice is constantly in the media and just under 10m people try to keep up to date with such health advice. However, the vast majority of these (just under 9m) admit that conflicting advice is confusing.
- The majority of consumers (23m) believe they know what to do to keep ...

### Eating Out Meal Occasions - UK

- While around 24m consumers eat out for a special occasion, almost 19m do so just because they feel like it and 15m eat out as a regular treat. The rise of discounting in recent months has helped eating out to remain

## Food and Drink - International

lack of compliance shows that there are significant opportunities for companies in the exercise category ...

accessible to consumers during the recession, especially families.

- Although ...

### Ice Cream - Europe

This report provides a pan-European overview of the ice cream market in France, Germany, Italy, Spain and the UK. For more detailed information, please refer to the five individual country reports: *Ice Cream, September 2009*.

### Healthy Eating - Ireland

Mintel's consumer findings (June 2008) revealed that 18% of RoI and 13% of NI consumers stated that a healthy option on a menu was most important, when choosing a venue for eating out.

### Alcohol Ready to Drink (RTDs) - UK

While FABs (Flavoured Alcoholic beverages) grew the alcoholic RTD (Ready-to-drink) sector exponentially during the late 90s, the landscape of the alcoholic market has since led to their equally sharp decline. With furore over binge and underage drinking, they have found themselves, somewhat harshly, a scapegoat for wider societal problems, however ...

### Ethnic Foods - US

Fueled by an increasingly diverse population; a resurgence in cooking thanks to the popularity of cooking shows and celebrity chefs; and a wave of convenience-focused products, ethnic foods have never been more popular in the US.

### Ice Cream - UK

- There is growing demand for indulgent 'treats' in the British diet and the £1.3 billion ice cream market is tapping into this demand with growing sales of luxury and premium ice creams at the expense of standard varieties. 14m adults buy ice cream as a treat.
- There are unexploited ...

## September 2009

### Vitamins and Minerals - US

The US vitamins and minerals market is driven primarily by the graying of America and the substantial population growth of women, two groups that report high penetration for these products. Dynamic growth among the Hispanic population also holds significant potential for marketing opportunities, although this group reports much less usage ...

### Ethical and Green Retailing - UK

This report focuses on consumer awareness of the issues and how their behaviour has changed in response to changing economic and environmental conditions. It identifies whether consumer action on environmental issues is increasing and assesses whether retailers need to do more on environmental and ethical issues as a consequence.

### Fast Casual Restaurants - US

While its heady growth days may be behind it, the fast casual segment continues to outperform the restaurant industry as whole, and remains poised for growth.

### Restaurant Service Trends - UK

Restaurant service trends have been gradually altering over the years in line with consumers' changing use of restaurants. The overriding trend is that eating out has

## Food and Drink - International

However, with respect to withstanding the pressure of the recession, and competing for added guest traffic, not all players are created equal. This report ...

### Convenience Stores - UK

Convenience retailing is changing fast. For years, it changed little while the food retailing market leaders concentrated on developing superstores to serve the primary weekly shop. But in the last ten years those same market leaders have turned their attention to C-stores and developed formats that serve consumers far better.

### Ice Cream - Germany

The German ice cream market has been on a downwards trend in both volume as well as value sales since mid-decade. The market is worth an estimated €3,016 million in 2009, a fall of 2% on 2008. While sales of impulse ice cream have been declining in both volume ...

### Functional Beverages - US

The functional drinks market exhibited hefty growth till the onset of the recession, but showed signs of distress amid ongoing difficult economic environment. Even though the new product activity has remained strong during the recession, most of those products primarily target teens or young adults who tend to be price ...

### Online Grocery Retailing - UK

The UK online grocery market is estimated at £4.4 billion (including sales tax and delivery charges) in 2009, having more than doubled (134% growth) in value over 2005-09. Rapidly rising food inflation, particularly in 2008, has contributed to high value growth in the sector, while dampening demand in volume ...

### Out-of-home Drinking - UK

This is the first time Mintel has produced a separate report looking at the market for and developments in on-trade alcohol. On-trade alcohol sales have grown steadily during the past decade but this disguises an underlying trend of decline in real terms – much of the increase being due to ...

become increasingly informal over the years as the reasons for eating out extend beyond special occasions to include simple refueling, to escape from household ...

### Ice Cream - France

Ice cream is a luxury product most often bought on impulse and sold at an affordable price. The French are fond of ice cream – penetration levels are high – but there has been a tendency to regard it as a table-based dessert, or a seasonal staple during the Festive ...

### Ice Cream - Italy

Italian sales of ice cream (not including artisanal) are expected to reach €1.7 million in 2009, declining by 1% on 2008. Volumes are expected to reach 202,000 tonnes, registering decline of around 1%. Sales are sluggish, with volume sales falling by over 6% between 2004 and 2009. Sales ...

### Breakfast Cereal - US

Breakfast cereals enjoy high household penetration as well as high personal consumption rates. This report explores the factors that influence product selection by the market's most fervent cereal consumers—families. Price, value perceptions, convenience and health emerge as key themes. The heart of the report is Mintel's exclusive consumer research and ...

### Ice Cream - Spain

After two consecutive years of falling volume sales, the Spanish ice cream market is expected to return to modest growth in 2009, to reach 301 million litres. In terms of market value, sales are being adversely affected by own-label expansion and declining demand of impulse ice cream, thus resulting in ...

### Drinks NPD - Europe

European Consumer Goods Intelligence is a unique series of fmcg market research reports, written by industry experts and incorporating exclusive insight into consumer activity and market trends.

## Food and Drink - International

### Stevia and Other Natural Sweeteners - US

The all-natural, zero-calorie sweetener market is in its infancy, relatively speaking. Since 1995, stevia, has only been permitted for sale in the US as a dietary supplement, not a sweetener. But in December 2008, the FDA approved rebaudioside A (Reb A) for sale in food and beverages, which will dramatically ...

### Quick Service Restaurants - US

This report explores the quick service restaurant market—identifying key developments that are changing consumer habits and usage of fast food. The concepts of quality and value, which have become more important during the recession, emerge as key themes throughout the report.

### Drinks NPD - Italy

The economic downturn has had a major effect on the review markets. Sales of alcoholic drinks, which were already in decline, have plummeted further, especially in the on-trade channels. Sales of beer reported lively growth until 2007, but lost ground in 2008 and 2009. In addition, consumers are trading quantity ...

### In-store Bakeries - US

In-store bakeries or on-site bakeries located in grocery stores, mass merchandisers or other food stores, are an important channel for the sale of breads, cakes and other baked goods and will generate over \$13 billion in revenue in 2009, according to Mintel estimates. This report will provide in-depth perspectives and ...

### Drinks NPD - France

The beverage industry has responded with great resourcefulness to changes in French attitudes towards drink, brought about by growing health concerns and financial worries. This is especially true of soft drinks, where new product developments are making an appreciable contribution to turnovers. But the whole industry is now marching under ...

### Seasonal Drinking - UK

While seasonality does have some influence in consumer alcohol purchase decisions, its role is more limited than might be expected given that seasonality is a recurring theme of drinks advertising.

### Spirits - US

The recession is driving some subtle, and not so subtle, changes in consumer behavior. Indeed, in virtually every category of consumer packaged goods, evidence of lifestyle change and adaptive behavior can be observed. The category of spirits is no exception. Not only has the amount of alcohol being consumed on ...

### Drinks NPD - Spain

New product development in the Spanish drinks markets reflects changing consumer demands, which have moved towards greater health orientation and value for money. Spaniards' changing drinking habits favour non-alcoholic drinks and low-alcohol content beverages, while the current economic situation is forcing many to look for more affordable products. However, over ...

### Salty Snacks - US

Salty snacks is a mature market with sales totalling \$17.7 billion in 2009. Amid the sinking US economy, salty snacks have proven to be a recession-proof category. In fact, the pace of growth picked up as the economy worsened.

### Drinks NPD - Germany

Although Germans are relatively receptive to new products and brands, economic uncertainty, coupled with an ageing population limits the scope for new launches. Suppliers are responding with NPD claiming health benefits, such as milder coffee, water with added minerals or vitamins and 'superfruit' juices. There is currently far more NPD ...

August 2009



## Food and Drink - International

### Seasonings - UK

Since 2007, value sales of seasonings have grown by 9.5%, to reach an estimated £203 million, however, with the effects of inflation removed, value sales actually fell 1.5% in real terms.

### Drinks NPD - UK

New product development is crucial to the drinks market, maintaining consumer interest and supporting branding, which is of particular value in alcoholic drinks. NPD can address some particular current problems - including declining sales of alcohol and a weighting towards younger consumers, which is far from ideal given an ageing demographic.

### Functional Foods - US

Difficult economic conditions have not substantially slowed the expansion of functional foods. Marketers and retailers continue to introduce new products, and more consumers continue to try them. In order to maintain the momentum, functional foods players will need to continue expanding into new benefit areas. They will also need to ...

### School Meals - UK

With the final deadline for nutritional guidelines set for September 2009, many government ministers would no doubt like to see the end of the school meals debate. However, for operators trying to mix the somewhat opposing concepts of attempting to run a profitable, commercial enterprise whilst meeting demands for social ...

### Adult Obesity and Diabetes - US

More than 150 million adults in the US are overweight or obese, and this affects businesses in diverse categories, including food service, supermarkets, airlines, healthcare, and weight loss. Understanding the needs, desires, and motivations of the overweight and obese population is essential to the success of countless corporations.

### Understanding Drinking Occasions and Unlocking Potential Customers - UK

The first part of this report focuses on how drinking behaviour differs considerably depending on the occasion. For example, lager, bitter, stout and cider are seen as drinks for a 'standard night' in or out, while spirits and cocktails are seen as almost exclusively for the 'big' occasion. Meanwhile, men ...

### Edible Oils - UK

Since 2007, value sales of edible oils have grown by 30%, to reach £323 million. When the effects of inflation are taken into account, value sales grew by 17% in real terms.

### Sandwich, Sub and Wrap Restaurants - US

The economy has decidedly impacted the restaurant industry, yet the leading Sandwich, Sub and Wrap operators have fared well. These restaurants, culled from the Quick Service and Fast Casual segments, have benefited from the best of both of those worlds, by providing fast, high-quality food at attractive price points.

### Salads and Salad Dressings - UK

Mintel last reported on the salad and salad accompaniments markets in 2007, since when, these markets have faced rising costs and tighter consumer budgets in the economic downturn. While the focus on healthy eating continues to benefit the market, consumer action lags behind changing attitudes.

### Premium Food and Drink Trends - Ireland

Faced with economic uncertainty, Irish consumers are thinking twice about all purchasing decisions, including the food and drink choices they make.

July 2009

## Independent Pubs - UK

Independent pubs appear to be in the middle when it comes to performance of the varying pub business models: managed pub groups have benefitted during the recession from their significant buying power and ability to offer extremely competitive pricing, tenanted/leased venues have been significantly hampered by their supply ties ...

## Sports and Energy Drinks - UK

The market for sports/energy drinks has been buoyant despite the effects of the recession – and in 2008 it accounted for a combined £941 million, up 10% on 2007. In volume terms, the market achieved some 484 million litres, also up 10% on 2007. For 2009, the market is ...

## Biscuits - UK

This report assesses the performance of the biscuits market. Faced with the challenge of rising ingredients costs in 2008, sweet and non-sweet biscuits have grown by 11.7% and 16% respectively between 2007 and 2009 to take the overall UK retail market for biscuits to an estimated £2.1 billion.

## The Dollar Channel - US

At the time of this writing, the country remains mired in a recession that began in December 2007. Throughout 2008, Americans made subtle and not so subtle changes to their shopping and spending patterns, which slowed growth at many companies and, more generally, the U.S. economy.

## Sweet and Savoury Spreads - UK

The spreads market is valued at £590 million in 2008 and is almost evenly split between sweet and savoury products. Sales of honey and chocolate/nut spreads have been particularly buoyant of late in sweet spreads, while in savoury spreads, chilled spreadables, such as sandwich fillers and pâtés, account for ...

## Food and Drink - International

### Nuts and Dried Fruit - US

The nuts and dried fruit market hasn't had to suffer the ups and downs, image-wise, that other snack foods have. Long accepted as genuinely healthy snack foods, the market has survived as Americans move from one diet trend to the next, and even thrived at the height of the low-carb ...

### Emerging Restaurant Concepts - US

In this report, Mintel provides insight and ideation on key trends shaping the present and future of the restaurant industry. Consumer healthfulness, restaurant sustainability practices, the evolving professional and household roles of women, time management, the Latinization of America—not to mention consumer rationales for dining—shape how consumers interact with restaurants ...

### Pet Food and Supplies - US

The pet food and supplies category continues to grow in spite of the recession thanks to a gradual increase in pet dog and cat populations and an ever more pervasive view of pets as members of the family. Premium priced pet foods promising healthy natural ingredients and indulgent dining experiences ...

### Noodles, Rice and Pasta - UK

This report assesses the performance of the noodles, rice and pasta market. Since 2007, value sales have grown by a significant 22.5% to reach £1.4 billion in 2009.

### Eating Out Review - UK

The recession has proved to be a considerable force for the UK eating out market: there was a 32% rise in restaurant businesses going to the wall in 2008 whilst consumer research for this report has found that a quarter of consumers (mostly families) state that the recession has had ...

## Food and Drink - International

### Energy Drinks and Energy Shots - US

The energy drinks market emerged in 1997 in the U.S. with the introduction of Red Bull and is still a relatively immature market. However, following years of impressive growth, energy drinks sales slowed in 2008 amid the economic recession and growing consumer concerns about their safety. Despite the introduction ...

### Healthy Living - US

The desire to live a healthy life is one almost all Americans hold—in fact, 90% of respondents to Mintel's exclusive consumer survey say that it is very or somewhat important to them to live a healthy lifestyle—and the decisions they make (or do not make) to this end have a ...

### Binge Drinking - UK

Drinking alcohol is engrained in British culture and shows no signs of abating – two thirds of adults drink at least once a week and the government estimates that 10 million people exceed daily limit guidelines.

## June 2009

### Carbonated Soft Drinks - US

The carbonated soft drinks market continues to exhibit a downward trend in sales and consumption. Even though the market still commands the highest consumer penetration among all non-alcoholic beverages, the market's long-term profitability appears to be threatened by a combination of factors including soda's link with the ongoing obesity issues ...

### Restaurant Brands - UK

Restaurant-branded products within the UK retail market remain niche, with factors such as the need for high restaurant brand awareness and competition from established grocery brands acting as significant barriers to entry. However, whilst there are various examples of restaurant-driven retail products that have failed to be sustainable over the ...

### Ready Meals - US

This report provides a comprehensive analysis of ready meals in the U.S. In the current economic environment eating at home is on the rise and this appears to be contributing to demand for some, but not all, ready meals; certain types of meals are performing well while sales of ...

### In-home Drinking - UK

This is the first time that Mintel has produced a separate report looking at the market for, and developments in, in-home drinking. In-home drinking has been rising in popularity in the UK for some time and the current recession is likely to increase its share of the total drinks market ...

### Kids' and Teens' Restaurant Eating Habits - US

This report explores kids' and teens' eating habits as it applies to restaurants—identifying trends that are changing consumer habits and perceptions about dining out and how restaurants are reacting to these needs. The report covers industry activity in and consumer attitudes and behavior towards full-service and limited-service restaurants from the ...

### Deli Meats, Bacon and Sausages - UK

This report assesses the performance of the delicatessen meats, bacon and sausages market. Since 2007, volume sales have fallen by 2.2%, whilst value sales have grown by 5.2% to reach £3.9 billion.

### Healthy Snacking - US

Representing a wide variety of foods, the market for healthy snacks was valued at \$29 billion in 2008. Sales grew by 17% from 2003-08 but there was zero growth in sales at inflation-adjusted prices. This report addresses issues of key concern to manufacturers, marketers, and distributors of healthy snack foods ...

## Food and Drink - International

### Bread - US

Bread is a mature market with 99% US household penetration. From 2003-07, sales were essentially flat after accounting for inflation. However in 2008, amid a troubled economic climate, bread sales surged as consumers shifted from eating meals out at restaurants to preparing meals at home.

### Pizza - UK

Worth £721 million in 2008, the pizza market is set to continue to grow by over 5% in 2009, with frozen pizza being slightly more important than chilled. Many consumers are trading around in pizza due to the recession, going from restaurants to takeaways or from takeaways to chilled or ...

### Side Dishes - US

In many households, side dishes are often an afterthought to the main course. However, in 2008, the segment grew by 10% compared to 2007 as cash-strapped consumers looked for ways to stretch their food dollars and add some variety to the in-home dining experience during tough economic times.

### Confectionery - UK

This report focuses on the UK market for sugar confectionery, mints and gum, which were last examined separately in 2007 (sugar confectionery and chewing gum & mints). The period since then has seen mixed fortunes for the market overall, with some sectors benefiting from innovation (ie chewing gum), while the ...

## May 2009

### Convenience Foods - Italy

Italian sales of selected convenience foods have been growing over the review period. Chilled ready meals registered double-digit growth and chilled soup was the star performer, with sales rising by 200% between 2006 and 2008.

### Coffeehouses and Donut Shops - US

### Health and Fitness Clubs - US

Revenues and memberships for the US health and fitness club industry continue to show growth on the surface, but a slowdown in real dollar growth belies a looming decline in industry demand. New downward pressure on average revenue per member comes from the nation's economic recession, as health clubs prepare ...

### Yellow Fats - UK

Since Mintel last reported on the yellow fats market in September 2007, rapidly rising costs have put pressure on the market and the economic downturn has taken its toll on consumers, while attitudes have shifted towards broad-based health.

### Wine - UK

In 2008, wine suffered its first volume and value decrease following several years of growth. Whilst the economic downturn has impacted on wine, Mintel believes it has accelerated the problems for wine, rather than being the root cause. A number of factors are working against wine. The market is increasingly ...

### Cheese - US

Despite, and in part because of, tough economic times, the cheese category is performing very well, growing 9% in 2008 and an expected growth of 4.2% in 2009. This report provides insight into the category from segment performance, to product innovations, to key consumer insights, as well as guidance ...

### Ice Cream and Frozen Novelties - US

Ice cream is truly one of life's great pleasures, enjoyed by young and old, those who are healthy and those who are ill, and people of virtually every culture, in all parts of the country, at all times of the year. Companies compete to create the lowest fat and highest ...

### Healthy Dining Trends - US

## Food and Drink - International

This report explores the coffeehouse and donut shop market in the U.S., identifying key developments that are changing consumer habits and perceptions about how they use them. Value—brought to the forefront by the challenged U.S. economy—emerges as a key theme throughout the report.

This report explores healthy dining trends—identifying key developments that are changing consumer habits and perceptions about health and food, and how restaurants are reacting to these needs. The report covers industry activity in and consumer attitudes and behavior towards full-service restaurants, fast casual restaurants, and fast food restaurants, as well ...

### Sports Venue Catering - UK

The market for sports venue catering is entering very challenging times having enjoyed a period of strong growth during the past five years. Operators report signs of consumers trading down, with the result that average spend per head seems certain to fall back during 2009. This is especially true if ...

### Yogurt - UK

Mintel last reported on the yogurt market in 2007, since when, the market has faced new challenges in the form of rapidly rising costs, a swing towards broad-based health in consumer attitudes and softening demand in the economic downturn.

### Tea and RTD Teas - US

Following years of rapid growth driven by the healthy eating trend, the tea market sputtered in 2008 as consumers cut back spending amidst the economic downturn. Sales of ready-to-drink (RTD) tea—the largest and, until recently, fastest growing segment in the category—stalled as consumers switched to more economical options, including private ...

### Convenience Stores - US

Sales growth in the convenience store industry has cooled off considerably since 2006 as the economic downturn and fluctuations in gasoline prices have impacted gasoline consumption and miles driven by consumers. Unable to count on gasoline sales for continued sales and traffic growth, innovative convenience stores are increasingly turning to ...

### Desserts - UK

With sales nearing £1.5 billion in 2008, the desserts market is typically dominated by the chilled sector, representing nearly 70% of the market. Recently, however, frozen and ambient desserts have become increasingly popular, as consumers look for cheaper dessert options in the recession.

### Convenience Foods - Europe

**Click on the PPT file to view this report.**

### Attitudes Towards Food: Weight and Diet - US

As Americans seek ways to cope with recession, many are spending more time cooking at home and scrutinizing food purchases. Millions of Americans are also aspiring to lose weight and improve their nutrition without compromising on the taste and convenience preferences that are powerful drivers in the food and beverage ...

### Convenience Foods - France

European Consumer Goods Intelligence is a unique series of fmcg market research reports, written by industry experts and incorporating exclusive insight into consumer activity and market trends.

### Convenience Foods - UK

We are what we eat – and what we drive and wear and, increasingly, how we live. The credit crunch and the

### Alcohol Consumption in Bars and Restaurants - US

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rapid collapse of hitherto solid financial institutions are calling into question many of the basic assumptions on which modern consumer societies are structured. The pursuit of growth at ...

This report comes at a time when the bar and restaurant market is in flux, with Darwinian tactics elevating those that can be successful to the forefront of the pack. This report evaluates the current state of alcoholic beverage consumption at bars and restaurants, with a focus on what's driving ...

### Convenience Foods - Germany

European Consumer Goods Intelligence is a unique series of fmcg market research reports, written by industry experts and incorporating exclusive insight into consumer activity and market trends.

### White and Dark Spirits - Ireland

The impact of the euro and consequent rise in cross-border trade has had mixed consequences for the spirits market. RoI consumers are thirsty for bargains and have helped boost the NI market in both the on- and off-trade. Competition on both sides of the border has intensified, with spirits sales ...

### Milk - US

The milk market continues to face multi-pronged challenges—competition from other dairy beverages, low awareness of functional innovations in milk, lack of flavor-based innovations, retraction in consumer demand, consumer concern about growth hormones and price deflation. This report addresses and provides answers to a number of challenges existing in this market.

### Convenience Foods - Spain

Spanish retail sales of ready meals, pizza, cooking sauces and soup continued to grow in 2008, supported by Spaniards' busier lifestyles and resultant changing eating habits. In 2009, growth is continuing, albeit at a slower pace than in previous years. While many Spanish consumers continue to follow a traditional Mediterranean ...

### Dark Rum, Cognac and Brandy - UK

On the face of it, dark spirits (as defined by this report ie not including whisky) is a declining market populated by old-fashioned brands with a traditional image. However, if one looks beneath the surface, there are some signs of renewal, with golden rums showing the way to the rest ...

## April 2009

### Portion Control - US

As companies introduce new "better for you" prepared foods and the government continues to view obesity as an "epidemic," Americans have continued to gain weight. Although government estimates now indicate that the rate of obesity is no longer on the rise, health experts agree that obesity has become a ...

### Fine Dining - US

The restaurant industry as a whole is in a bind. A global recession has patrons eating out less and spending less when they do go out, and fine dining, as a deeper pocket experience, has been especially hard hit. Many establishments have had to shutter their doors and others are ...

### Pasta and Pasta-based Meals - US

### Cheese - UK

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This report explores the pasta and pasta-based meals market. As a mature market, pasta and pasta-based meals enjoy a high household penetration and personal consumption rate; however, several factors emerge that influence consumer behavior and attitudes towards consumption. Price/value perceptions, convenience and health emerge as key themes driven by ...

### Baby Food, Drinks and Milk - UK

Since Mintel last reported on the baby food, drink and milk market in 2007, sales have continued to see dynamic growth, fuelled by rising birth rates and wider usage, largely on the back of NPD.

### Entertainment Foods - UK

The UK's love affair with cooking is not fully translated into frequent entertaining because some consumers lack the confidence and skill to serve the high standard of food they perceive is required when entertaining guests.

### Attitudes to Ethical Food and Drink - Ireland

Since Mintel last reviewed Ireland's ethical food and drink market in February 2008, core issues in the sector seem to have remained the same. Food scares, animal welfare and fair trade issues, environmental concern and health and well-being remain clear motivations behind Irish consumers' shopping behaviour.

### Market Re-forecasts: Foodservice - US

Mintel has undertaken some bold initiatives that provide crucial insight into current market conditions and approaches to a range of markets moving forward. Most dramatically, Mintel conducted an exhaustive re-evaluation of consumer market forecasts of our reports.

### Non-alcoholic Beverages: A Retail Perspective - US

After several years of slow but steady growth, non-alcoholic beverage category dollar sales slipped slightly in 2008. Non-alcoholic beverages have experienced an explosion of new products; new beverages delivering

This report focuses on the UK market for cheese, which Mintel last examined in July 2007. The period since the last report has seen major challenges for the industry. Initially these came from the impact of rising prices, which, added to what were already falling milk volumes, led to a ...

### The Theatre of Eating Out - UK

This report is the first from Mintel that looks at the 'Theatre of Eating Out'. It explores the changing consumer preferences for eating out and the ways in which a meal out becomes an 'experience'.

### Restaurant Beverage Trends - US

While the recession has squarely hit the restaurant industry, that does not mean restaurant beverage innovation has stopped. To the contrary, in an environment where consumers are greeting expensive beverages less enthusiastically, the industry has worked hard to adapt.

### Market Re-forecasts: Food - US

Mintel has undertaken some bold initiatives that provide crucial insight into current market conditions and approaches to a range of markets moving forward. Most dramatically, Mintel conducted an exhaustive re-evaluation of consumer market forecasts of our reports.

### Market Re-forecasts: Drink - US

Mintel has undertaken some bold initiatives that provide crucial insight into current market conditions and approaches to a range of markets moving forward. Most dramatically, Mintel conducted an exhaustive re-evaluation of consumer market forecasts of our reports.

### Obesity - UK

Although obesity is not a recent medical disorder, it is only in the late 20th Century that this condition has reached epidemic proportions in terms of its prevalence. The scale and speed of the growth in obesity suggests

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ever more narrowly targeted benefits in areas ranging from energy and performance to environmental sustainability. The breadth of choice available to ...

that, whilst certain genes might make certain individuals more prone to obesity ...

### March 2009

#### Gin, White Rum and Other White Spirits - UK

Sales of gin and other white spirits have grown by 5% in value and volume since 2003, fuelled by growth at the budget and premium ends of the market, to over 46 million litres valued at £1.2 billion in 2008.

#### Sandwiches and Other Lunchtime Foods - UK

Changing working patterns and the economic downturn are having a radical effect on the market for lunchtime foods. The time available for lunch at work is decreasing and an increasing proportion of workers are eating at their desks or skipping lunch altogether, relying on snacking throughout the day to meet ...

#### Vodka - UK

Vodka leads the UK spirits market in both sales and growth rate, surpassing Scotch whisky in 2007, with sales rising by 29% in volume to 79 million litres and 20% in value to over £1.8 billion between 2003 and 2008.

#### Leisure Venue Catering - UK

The leisure venue catering market is facing a period of uncertainty, with the impact of the global recession still to fully unfold, as consumers and operators rein in their expenditure in reaction to it.

#### Children and Obesity - US

This report examines the current state of childhood obesity in the U.S. and focuses on parents' opinions on obesity's cause, its prevalence and things that parents—and children—can do to combat it.

#### Nutrition and Energy Bars - US

Thanks to numerous new product introductions, an increased interest in healthy snacking and exercise, diet fatigue and American's on-the-go lifestyle, nutrition and energy bars have experienced moderate growth since 2003. Nutrition and energy bars seem to have one up on competition such as yogurt, trail mix and smoothies thanks to ...

#### Packaging Trends in Food and Drink - US

This report focuses on current trends in food and beverage packaging in the U.S., with an emphasis on sustainability, health and wellness, and convenience trends. Mintel explores how changing consumer preferences—including a renewed interest in valuedriven by the economic recession and growing concern about the environment—are impacting packaging design.

#### Ethnic Cuisine - UK

While the market may be viewed as relatively mature it remains dynamic with a wide variety of different cuisines on offer. Of these, Mexican and Thai are the most established although with many other styles at the margins. So-called Ethnic Purists, who eat ethnic cuisine several times a week, are ...

#### Market Re-forecasts - Foodservice - UK

#### Market Re-forecasts - Drink - UK



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### Mintel's re-forecasting puts markets in realistic light

#### Market Re-forecasts - Food - UK

### Mintel's re-forecasting puts markets in realistic light

#### Breakfast Foodservice Trends - US

The restaurant industry is no stranger to the recession, and economic woes mean that restaurant patrons are going to restaurants less, going to cheaper restaurants and spending less. However, eating out is still considered the primary way consumers spend extra money, and the breakfast daypart is ready to serve with ...

## February 2009

#### Bread and Morning Goods - UK

Food inflation coupled with the recession present the bread and morning goods market with challenges and opportunities.

#### Carbonated Soft Drinks - UK

Carbonates have a large, youthful constituency and the core consumers care least about the health issues that have latterly enveloped the market. Despite this, 'healthier' soft drinks have recorded far faster growth and NPD and marketing is trying hard to reposition fizzy drinks as 'natural' and 'healthy'. This is helping ...

#### Coffee Shops - UK

After a prolonged period of consistent year-on-year growth, much of the coffee shops market is now entering

### Mintel's re-forecasting puts markets in realistic light

#### America's Changing Drinking Habits - US

The non-alcoholic beverage market has been in a state of flux since the past decade, with a paradigm shift in consumer preferences for non-alcoholic beverages. While beverage manufacturers need to fine-tune their offerings to align with the changing trends in consumer preferences for different non-alcoholic beverages, marketers also need to ...

#### Brands - Are Supermarkets Squeezing Out Brands? - UK

Supermarkets' own-label offerings have long been a significant part of the UK food sales, holding a share of nearly 29%.

#### Attitudes to Food and Drink - Ireland

The foodservice sector in Ireland experienced strong growth between 2003 and 2008, however, the rising costs of living and looming threat of unemployment are likely to restrict growth over the next five years.

#### Lunchtime Eating - US

This report explores the lunchtime eating market-identifying key developments that are changing

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a phase of consolidation, as consumers and operators alike hunker down in reaction to the current economic recession. Although the market proved particularly resilient during the last economic downturn in the early 1990s ...

### Influence of the Environment on Food Shopping - UK

Protection of the environment, and climate change in particular, are among the greatest challenges facing the UK today. It is no wonder, therefore, that retailers, manufacturers and consumers are taking action to counter the impact of climate change and other environmental effects. The majority of consumers are concerned about environmental ...

### Fruit - US

This report focuses on the U.S. fruit market. In addition to presenting sales data by segment, supplier and brand, the report considers a range of topics, including:

### Fruit Juice and Juice Drinks - US

The fruit juice and juice drinks market continues to face multi-pronged challenges: consumer perception of fruit juice and juice drinks as a high-carb beverage, competition from new age beverages such as enhanced water and ready-to-drink tea, and continued price escalation primarily due to natural disasters. This report not only provides ...

## January 2009

### Baby Food and Drink - US

With only a slight increase in the population of children aged three and under and slow but steady increases in the percentage of mothers who breastfeed their babies, the baby food and drink market has experienced only minimal dollar sales increases over the past five years. Economic pressures are likely ...

consumer habits and perceptions about lunch. Value emerges as a key theme throughout the report and has been intensified by the unstable U.S. economy.

### Tea and Herbal Tea - UK

Backed by greater demand for speciality and herbal varieties, the UK retail market for tea and herbal tea managed to post modest growth in 2008 (1% in volume and value) despite a more lacklustre performance by standard tea, which, however, still accounts for the bulk of sales.

### Crackers - US

After recovering from a slight dip that came at the peak of the low-carb diet fad in 2004, the cracker category has registered slow but steady increases in dollar sales. These sales gains, however, have come mostly as a result of price increases. Competition for share is fierce, and leading ...

### Marketing, Promotion and Advertising Strategies of the Eating Out Market - UK

This report considers the marketing, promotion and advertising strategies used in the eating out market and will explore the process that allows an eating out organisation to maximise the effectiveness of its marketing budget, thereby achieving a sustainable competitive advantage.

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### Attitudes Towards Dining Out - US

In 2009, the restaurant industry will face steep challenges, the result of an economic downturn that has reduced guest traffic at almost every restaurant segment in 2008, leaving the industry reeling. This is why this report is a must read for industry participants, as it provides needed insight into the ...

### Crisps and Snacks - UK

The last Mintel report on crisps and snacks pointed to steady growth in the market based on a shift in consumption from children to adults. Growth in the market has exceeded these earlier expectations, despite continued pressure to reduce snacking behaviour among both children and adults in a drive towards ...

### Lower Alcoholic Drinks - UK

Concern over binge drinking and related health issues has revived the market for low-alcohol drinks, boosting sales by 10% in volume and 12% in value to stand since 2006 at 20 million litres worth £66 million in 2008.

### Kosher Foods - US

The kosher food market in the United States includes both "ethnic kosher/traditional kosher" products such as matzoh and "mainstream kosher" products-processed foods that have received kosher certification, but are in no other way identified with a religious kosher market. Sales in the kosher market are primarily reliant on the ...

### Fair Trade Foods - UK

Despite its meteoric growth, the Fairtrade market still remains largely niche and it is questionable whether it is likely to remain as such or whether it will reach mass-market status. This report explores whether ethical consumerism is just a marketing buzzword.

### Fruit and Vegetables - UK

While an already large market, demand for fruit and vegetables continues to expand to the benefit of all three main sectors profiled (fresh, frozen and canned). Much of the recent increase in volumes has resulted from the trend towards healthier eating as well as the push being given by the ...

### Pizza - US

The pizza category is "humming on all cylinders" with impressive sales gains bolstered by innovations across the board. This report not only gives insight into what developments have been most successful and why, but also how the industry can take it a step further and continue to capitalize on consumer ...