

### October 2019

#### Food and Non-food Discounters - UK

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

### September 2019

#### Perimeter of the Store - US

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

#### Attitudes towards Sugar and Sweeteners - UK

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

#### Center of Store - US

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

#### Marketing to Moms - US

"Moms are responsible for most household and childcare duties, meaning that they are the key decision makers when it comes to what their families eat, wear,

#### Hot and Cold Cereal - US

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

#### Dark Spirits and Liqueurs - UK

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

#### Alcoholic Beverage Drinking Occasions - US

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

#### Flavor Innovation on the Menu - US

"Demand for flavor innovation on the menu is already high, and it's poised for continued future growth

## Food and Drink - International

and watch. However, this also means moms are being pulled in a million different directions and may not have the time or the inclination ...

### Vitamins and Minerals - US

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

### Pet Food - UK

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

## August 2019

### Attitudes towards Sports Nutrition - UK

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

### Vegetables - US

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

alongside the population growth of the most Adventurous Eaters: young and Hispanic consumers. Millennials in particular are hungry for less-common flavors and ingredients on the menu, spanning everything from sour flavors to seafood ...

### Restaurant Breakfast and Brunch Trends - US

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

### Bread - UK

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

### Sweet & Nut Spreads - UK

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

### Breakfast Cereals - UK

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

The ...

## Food and Drink - International

### Tea and RTD Teas - US

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

### Burger and Chicken Restaurants - UK

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

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

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

### On-premise Restaurant Technology - US

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

**July 2019**

### Frozen Breakfast Foods - US

"With 2019 sales estimated to reach \$3.7 billion and forecast to continue on this same trajectory, the frozen breakfast category is holding its own, fueled by consumer pursuit of heartier breakfast solutions.

### Fruit - US

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

### Approach to Health Management - US

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

### Savoury Spreads & Dips - UK

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

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

"High quality of food is no longer a luxury but an expected standard for restaurants and takeaways. As

## Food and Drink - International

Innovation in not only flavors and formats but also nutritionally focused positioning is gaining traction as consumers ...

such, operators need to pivot away from a focus on convenience to instead capture the simple joy of eating outside of the home."

– **Trish Caddy, Senior Foodservice Analyst**

### Yogurt and Yogurt Drinks - UK

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

### Cookies - US

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

### Pet Food - US

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

### Coffee and Tea on Premise - US

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

### Sports and Energy Drinks - UK

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

### The Natural/Organic Food Shopper - US

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

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

### Coffee - US

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

### Tea and Other Hot Drinks - UK

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

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



## Food and Drink - International

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