

January 2023

Supermarkets - UK

“While the grocery sector is to a degree insulated from much of the pain being felt elsewhere in retail as much of its demand is non-discretionary, the shifts in behaviour seen in 2022 and that will continue to be seen in the short term have been no less dramatic. A ...

December 2022

Sweet Biscuits - UK

“The cost of living crisis is already leading people to cut back on sweet biscuits, but given that 75% of people think that sweet biscuits are an affordable treat they are in a better position than many other discretionary items. In-store visibility for sweet biscuits is being hampered by HFSS ...

Cooking Sauces and Pasta Sauces - UK

“More at-home meal occasions brought about by the income squeeze offer opportunities for cooking/pasta sauces, although they will face greater competition from scratch-cooking. Ideas on how to use them with leftovers and suitability for cheaper cooking methods can help these appeal as people look to save money. Meanwhile, guidance ...

November 2022

Vitamins and Supplements - UK

“While the COVID-19 pandemic propelled rapid growth in the market in 2020, sales have stagnated as concerns about the virus have eased. As more of the nation sees its finances stretched, efforts to prioritise health will ebb, leaving this category vulnerable to cutbacks. Highlighting the role they can play in ...

Leisure Outlook - UK

“The recent increase in gym usage highlights the importance consumers continue to place on good physical and mental wellbeing. However, the fact that over-65s are most likely to be motivated by activities

Ice Cream - UK

“The cost of living crisis stands to dampen demand for ice cream and dial up the pressure on brands to prove their value in the coming year. Interactive ice cream serves hold potential for engaging consumers in the short term, sparking strong interest and being well-placed to cater to evenings ...

Meat Substitutes - UK

“The impressive growth enjoyed by meat substitutes has faltered in 2022, as the COVID-boost has been lost and the income squeeze has made the high price of these more of a barrier. Driving awareness of their nutritional credentials and emphasising versatility can help these products navigate the income squeeze. Interest ...

Bread - UK

“Value sales growth in bread in 2022 is being driven by high inflation, with volumes hit by reduced frequency of eating bread. Developing more choice of flavours in bread could help flagging volume sales, and while

that are good for their physical wellbeing, but the least likely to attend the gym suggests there are ...

brands will be vulnerable to people switching to own-label to save money during the ...

October 2022

Processed Poultry and Red Meat Main Meal Components - UK

“Although the income squeeze will prompt trading down in the market, against a strong 2021 and given trading down within the market, sales will fall in 2022. Calling out how to use processed meat in place of unprocessed meat cuts will chime. Meat reduction poses a long-term threat, but interest ...

Cheese - UK

“The income squeeze will take its toll on cheese, with 42% of people who eat and buy cheese saying money concerns would make them spend less. Together with the popular view that own-label cheese is just as good quality as branded, this puts the leading brands under pressure to prove ...

Pet Food - UK

“Belying the oft-cited ‘recession-proof’ nature of the category, shifts in behaviour driven by the cost-of-living crisis and high levels of inflation will see volume sales slip into decline in 2022. While its expensive image is a major barrier for eco-friendly pet food, there are ripe opportunities around concepts combining sustainability ...

Chocolate Confectionery - UK

“Growth in volume sales of chocolate will be dampened by a combination of the income squeeze, HFSS restrictions and consumers’ focus on moderation. Evenings in and gifting will support sales during the cost-of-living crisis, given that eight in 10 eaters and buyers of chocolate think it is an affordable treat ...

September 2022

Food and Non-food Discounters - UK

“Following two years of pandemic-impacted trading the UK’s economy has now been hit by record inflation. Amid this growing cost-of-living crisis, consumers are increasingly looking at ways to stretch already tight budgets. The discounters with their clear value focus are set to benefit from this period of financial uncertainty. As ...

Yogurt and Yogurt Drinks - UK

“Rapidly rising inflation in the yogurt category and the wider cost of living crisis put the leading brands at risk of trading down in 2022 and 2023. The continued interest in health however will drive continued demand in the category, also creating opportunities for operators to drive added value. Keen ...

August 2022

Breakfast Cereals - UK

“The strong perception of breakfast cereals as a good-value breakfast choice will support the market while household incomes are squeezed. Making the contribution to daily nutrient intakes more central to on-pack messaging can help the category tap into the

predicted long-term focus on health. Meanwhile, interest in ideas about what ...

July 2022

Consumer Snacking - UK

“With the rising cost of living shoppers will be focusing more closely on what they are buying, potentially putting discretionary items like snacks under scrutiny. However, as seen during COVID-19 lockdowns snacks could actually benefit from more evenings in given their perceived affordability as treats. Amidst upcoming HFSS restrictions on ...

Sugar and Gum Confectionery - UK

“Value sales of sweets and gum have shown a strong recovery in 2021/22, but volume growth remains hard to achieve. While consumers show strong interest in sugar reduction NPD, such products continue to play a limited role in the market, the technical hurdles in delivering a compelling experience a ...

June 2022

Attitudes towards Lunch at Home - UK

“A permanent shift to more remote working will continue to support the at-home lunch occasion going forward. Pressures on household incomes in 2022 will boost the appeal of home-made lunches as an affordable option, benefiting ingredients and meal components. Products which tick a number of boxes on nutrition will tap ...

Attitudes towards Lunch Out-of-home - UK

“Lunchtime foodservice operators’ margins have been squeezed more than ever before having felt the brunt of the pandemic, Brexit, VAT returning to 20% from 1 April 2022 and now unprecedented increases in fuel/energy and ingredients costs. They must also contend with Britons’ preference towards eating lunch at home, resulting ...

Ready Meals and Ready-to-cook Foods - UK

“While incomes feel squeezed in 2022, ready meals/ready-to-cook foods can offer an affordable alternative to eating out. Making healthy ingredients visible will help the category respond to the predicted long-term focus on health, whilst interest in shelf-stable, vegetable-based ready meals points to an opportunity for the segment to tap ...

Dairy and Dairy Alternative Drinks, Milk and Cream - UK

“At a time when the rapidly rising cost of living is weighing on consumers’ minds, milk producers are also facing an uphill battle due to rising costs, these feeding through to sharp rises in retail prices. Looking to the future, sustainability presents the market with both a threat and an ...

Food and Drink Gifting - UK

“Food and drink gifting occasions will remain resilient during the income squeeze in 2022-23, but there is a strong likelihood of trading down within categories. Recommendations of more affordable substitutes for favourite products should chime in this climate. ‘Build your own gift package’ initiatives can also help retailers to attract ...

World Cuisines - UK

“The world cuisine retail market will benefit from these products offering an affordable alternative to eating out as incomes are squeezed in 2022. Familiar dishes ‘with a twist’ can help lower barriers to trial for less established cuisines, whilst versatile products suitable for meat-containing and meat-free meals can tap into ...

Convenience Stores - UK

"New technologies, ways of living and government legislation are opening up exciting opportunities for the convenience sector but retailers must adapt quickly to tap into them. A renewed focus on making the experience convenient as well as revamping food-to-go will be top of the agenda, but rising inflation, growing costs ...

May 2022

Leisure Outlook - UK

"18-24s are now as likely to take part in competitive socialising activities as they are to go to the pub for drinks, highlighting their desire for new and varied activities that provide a sense of adrenaline but don't necessarily involve consuming alcohol".

– Paul Davies, Category Director – Leisure, Travel ...

Cakes, Cake Bars and Sweet Baked Goods - UK

"Cakes and sweet baked goods saw a strong recovery in 2021 sales, driven by the return of social gatherings, and should be fairly well protected from the income squeeze through being an affordable treat for most people. Visual appeal is a big driver of choice in cakes, so reduced in-store ...

April 2022

Free-from Foods - UK

"As concerns about inflation and the rising cost of living intensify, free-from products face growing pressure to justify their presence in consumers' shopping baskets. Messaging around the environment remains a key one for operators even amidst these pressures given the long term expected greater emphasis on this area."

Attitudes towards Healthy Eating - UK

"Propelled by the pandemic-driven rise in both eco- and health- consciousness, the prevailing 'holistic health' ethos is increasingly extending to that of the planet, and

Breakfast Eating Habits - UK

"The return to workplaces and places of study has offered long-awaited support for out of home venues. Some 51% of adults reported eating breakfast out of home in early 2022, this figure set to rise further as people are asked to go back to workplaces more regularly.

The enduring shift ...

Brand Overview: Food - UK

"The nation's sweet tooth creates opportunities of growth for brands that consumers see as delicious and indulgent. However, attempts from the UK government to promote healthier nutritional habits make it more challenging for brands to tempt consumers with HFSS treats. As the rising cost of living puts the notion of ...

Baby Food and Drink - UK

"Pressure on household incomes in 2022 will erode sales of baby food, drink and milk by boosting scratch cooking and further reducing birth rates. Parent/toddler cooking kits and frozen baby/toddler food products warrant

a very powerful proposition will be created through bringing together benefits around both. The popular concepts of 'food as medicine' and 'mood foods' continue to ...

Snack Bars and Breakfast Biscuits - UK

"Snack bars and breakfast biscuits will continue to benefit from demand for both in-home and out-of-home snacks as consumers return to workplaces/places of study, the on-the-go element of the category still having enduring appeal. The healthier proposition of the market in comparison to many other snacks will help to ...

March 2022

Online Grocery Retailing - UK

"The online grocery market defied expectations in 2021 by putting on further growth following the monumental uptick in demand caused by the pandemic in 2020. Rebalancing between stores and online will come in 2022, but it is clear the legacy boost to the online channel will be larger than first ...

Yellow Fats and Oils - UK

"As with many other markets, yellow fats and edible oils sales saw a sharp uptick during the COVID-19/ coronavirus outbreak. While the lifting of restrictions should see less demand for at home meals, the income squeeze will offset this. Price rises in 2022 will provide an opportunity for own-label and ...

February 2022

Lunchtime Foods in Retail - UK

"The easing of COVID-19 restrictions from summer 2021 has enabled lunchtime foods in retail to begin to recover from the significant blow that the pandemic dealt on them. Whilst the income squeeze in 2022 will push some to scrutinise these purchases more closely, longer-term opportunities lie in the at-home lunch ...

Food - UK

attention, given strong consumer interest and limited availability. The former's appeal as a fun and ...

Consumers and the Economic Outlook Q1 - UK

"Even before the conflict in Ukraine, inflation had become the biggest concern for consumers, brands and the British economy for 2022. Households are set to endure the biggest squeeze on real incomes in decades, and the conflict in Ukraine will only add to existing inflationary pressures. This is seen in ...

Attitudes towards HFSS Food & Drink - UK

"Restrictions on the promotion of HFSS food and drink are due to kick in from October 2022 and will hit the visibility of products under the categories covered. Categories where a very high proportion of products are HFSS, such as chocolate, crisps and cakes, will be hardest hit, especially because ...

Leisure Outlook - UK

"The first signs of how inflation will impact the foodservice market are beginning to show. Takeaways remain a popular option with consumers' substituting evenings out with evenings in, meanwhile those heading out for a meal are favouring full-service restaurants that justify the expense by offering something extra special".

Cooking Sauces and Pasta Sauces - UK

“As COVID restrictions lift and consumers return to workplaces and out-of-home leisure, at-home meals will be hit, including cooking and pasta sauces. The income squeeze in 2022 will limit this effect. The long-term shift to more working from home opens up everyday lunch as a new opportunity for the market ...

Crisps, Savoury Snacks and Nuts - UK

“While there is much openness to healthier products among users of crisps, savoury snacks and nuts, taste takes priority over healthiness for most. While curbs on volume promotions under incoming regulations will have a limited impact on the market, the loss of in-store visibility for HFSS food and drink ...

January 2022**Fish and Shellfish - UK**

“Increased cooking from scratch and at-home meal occasions during COVID-19 gave the fish/shellfish market a considerable boost in 2020. That fish/shellfish is seen in a more favourable light in terms of health compared to meat should also help the market tap into heightened interest in health. Whilst an ...