

## January 2018

### Air Treatment - US

"Household penetration of air treatment devices has experienced minimal fluctuation over recent years, showing signs of a stable market. There are some non-owners of these products who report interest in owning, however a larger percentage of non-owners are not interested, primarily due to lack of need. Positioning these products as ...

### Baby Food and Drink - International

Mintel's Global Annual Reviews discuss significant issues faced by key categories, including an in-depth review of the big stories from the past year, a look forward into major issues our analysts see on the horizon for the next year, and predictions for issues that could disrupt or influence the category ...

### Beauty and Personal Care Retailing - Europe

"Retailing of beauty and personal care products is poised for change. It looks as if the mass market drugstores are approaching maturity in some countries while the retailers with the greatest potential are those with innovative own brands. But specialists who can provide the right environment plus a range of ...

### Beauty and Personal Care Retailing - Germany

"There is growing pressure on the market leaders in beauty and personal care retailing in Germany. Online is growing, with Amazon an increasingly important player. There are newcomers in the specialist cosmetics and perfumery sectors. We think that some of the market leaders are already showing signs of this increased ...

### Beauty and Personal Care Retailing - Spain

"As the Spanish political situation becomes more uncertain with lower rates of economic growth forecast for 2018, beauty specialists will need to work harder to compete with the growing force of supermarkets and

### B2B Insurance - UK

"With most insurance premiums rising, businesses are seeking alternatives to the traditional products on offer. Insurers need to adapt existing operating models to meet this demand otherwise new entrants to the industry, who could benefit from quickly adapting to policyholders' needs, will overtake insurers in the same way that technology-led ...

### Back to School Shopping - US

"Back-to-school shopping is a much hyped annual event for good reason: For the 2017 school season, consumers planned to spend over \$83 billion for the occasion. During the past two school seasons (2016 and 2017), both parents and college students planned to increase their annual spending, going against trend. This ...

### Beauty and Personal Care Retailing - France

"French specialist beauty and personal care retailers are doing well, increasing their share of a sluggish market. Sephora leads by some margin, but Nocibé, now under the Douglas umbrella, is doing well and Kiko Milano is expanding rapidly. With 30% of female BPC buyers having shopped online, and 47% often ...

### Beauty and Personal Care Retailing - Italy

"Although the Italian BPC market remains fragmented, there is ongoing consolidation in the market as a number of the leading specialists strengthen their position. As the economy continues to recover, there will be new opportunities for retailers to capture increased spending on beauty and personal care. Having a differentiated offer ...

### Beauty and Personal Care Retailing - UK

"The UK beauty and personal care market remains challenging, as weak growth in personal care continues to hinder growth in the wider market. Meanwhile, the beauty segment is driving the market, boosted by make-

fashion retailers that are grabbing share of the beauty market. They need to focus on improving the ...

## Beer - International

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## Biscuits, Cookies and Crackers - All Regions

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## Black Friday - UK

"Black Friday has continued to grow and is now undeniably a firm fixture in the retail calendar. But despite growing numbers of retailers and shoppers taking part in the event, there is a palpable and growing sense of disillusionment among consumers. In the years ahead, retailers and brands will need ...

## Bread, Bakery and Cakes - All Regions

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## Butter and Spreads - Ireland

"Irish consumers show a preference for butter over butter-like spreads. This reflects the growing distrust in the food industry in recent years and that they are turning to less processed food. Highlighting traditional production methods, recipes and local ingredient

up and skincare trends. Many of the health and beauty specialists have reacted to these trends and ...

## Beverage Blurring - US

10% of US adults drink hybrid/fusion drinks in a typical day. While this is dwarfed by more commonly consumed drinks, such as water (81%), carbonated soft drinks (44%), and juice (43%), it's not a bad showing. Good taste drives consumers' beverage choices. And while hybrid drinks can capture attention ...

## Black Consumers' Content Consumption and Sharing - US

"In spite of factors that could limit entertainment options, Black consumers make video content a priority in their leisure time. Although there is interest in sharing thoughts and experiences, consumption of content seems to be a preference over creation. Live TV is a particularly important element of a Black adult's ...

## Brand Overview: BPC - UK

"The advancement of technology in the BPC sector means that brands are under more pressure to help consumers test, design and buy products on their own terms. Soon, the prospect of buying an off-the-shelf, one-size-fits-all product may become unpalatable to the most heavily engaged consumers, while even mainstream shoppers will ...

## Breakfast Cereals - All Regions

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## Butter and Yellow Fats - All Regions

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sourcing can help butter brands to put a clear stamp of ...

## Carbonated Soft Drinks - International

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## Children's Online Spending Habits - UK

"Children are particularly responsive to products seen online, so brands must keep a strong social media presence and work with social influencers to promote their product. However, brands must also ensure they are responsibly targeting these consumers to ensure the gatekeepers to a child's money – the parents – are ...

## Cider - UK

"Smaller servings are a promising means for cider companies to attract custom in both the off- and on-trade. These should appeal to the health-conscious through lower alcohol units and calories, and also financially through a lower item price. This latter is arguably especially needed given the pressure on household incomes ...

## Coffee - All Regions

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## Condiments and Dressings - UK

"Wider trends in the food market, such as consumers' appetite for emerging cuisines, have impacted usage of condiments/dressings. While this has hit sales of dish-specific sauces, NPD in mayonnaise inspired by hot and spicy flavours has re-energised the segment. Sizeable

horizon for the next year, and predictions for issues that could disrupt or influence the category ...

## Cheese - International

Mintel's Global Annual Reviews discuss significant issues faced by key categories, including an in-depth review of the big stories from the past year, a look forward into major issues our analysts see on the horizon for the next year, and predictions for issues that could disrupt or influence the category ...

## Chocolate, Sugar and Gum Confectionery - International

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## Civil Engineering - UK

"The way companies procure civil engineering firms to deliver work is changing, particularly in the utilities sector. Recent years have seen an increasing number of civil engineering companies enter into long-term partnerships and alliances with customers as utility companies look to form more collaborative relationships with suppliers. Alliances that last ...

## Computer Security - UK

"Computer security is an issue for consumers, SMEs, enterprises, and the public sector. It affects anyone who uses any internet-connected device, or indeed anyone who does any transaction with an organisation that has an internet-connected device. Few people fall outside of this definition, with the issue increasingly ranging from national ...

## Consumer Attitudes towards Housing Needs - China

"Young adults in China, eg post 90s, show a more welcoming attitude towards renting. However, that is because they are willing to spend more of their income in improving living quality when they are tenants. They

interest in fermented condiments and a wider availability of ...

## Consumer Snacking Trends - China

"Despite the increasing propensity to be health conscious among today's consumers, as high as 80% of people still say snacking makes them happy rather than guilty, suggesting snacking innovation isn't just about healthy-driven, better-for-you products. There is a true demand for real indulgence, especially as Mintel's research reveals that snacking ...

## Consumers and the Economic Outlook - US

"Economic improvement continued at a relatively steady clip as a new presidential administration took office at the beginning of the year. While there have been natural catastrophes and tragedies throughout the US, the economy has generally remained stable and any expert predictions continue to be optimistic."

- Jennifer White Boehm, Associate ...

## Cooking Sauces, Pasta Sauces and Stocks - All Regions

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## Dairy Drinks - International

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## Ethnic Restaurants and Takeaways - UK

still hold a strong mind-set at owning a property of their own. To attract ...

## Consumer Trends, Attitudes and Spending Habits for the Home - UK

"In 2017, spending remained strong on buying for the home in the UK, despite growing uncertainty about the economy. But in the five years from 2017-22 market growth will slow, as consumers feel a real squeeze on their personal disposable income. Owner-occupiers and those who say that their finances are ...

## Consumers, Saving and Investing - UK

"Financial pressures will make it increasingly difficult to save going forward. Providers can help people by offering budgeting and financial management tools that can increase engagement and offer insights into where they can make savings."

## Crisps, Savoury Snacks and Nuts - UK

"While enjoyment and indulgence play a key role in the market, health considerations are also affecting it, driving the growth in popcorn, nuts and meat snacks. That half of savoury snack eaters deem snacks made with pulses healthier than potato-based ones suggests scope for further NPD here."

- Anita ...

## Electrical Wholesalers - UK

"Brexit has created a challenging environment for electrical wholesalers, with a pincer effect from delays and postponements in industrial and commercial construction projects, and the increasing price of imported products at a time of intensifying competition."

- Terry Leggett Senior B2B Analyst

## European Retail Briefing - Europe

“Much of ethnic restaurants and takeaways’ growth will come from businesses driving existing store performances on the back of strong brand management, menu development and home delivery options. ‘Foodism’ continues to fuel demand for new flavours found in ethnic cuisines, specifically among younger Millennials, parents and those living in urban ...

## Fashion Accessories - UK

“While women aged 16-24 are the main fashion accessories buyers, they show little brand loyalty meaning that retailers and brands need to do more to compete for their spend. Given that fashion trends drive purchasing among young women, retailers and brands need to focus more on appealing to them with ...

## Feminine Hygiene and Sanitary Protection Products - UK

“There is a quiet revolution ongoing in the incontinence products segment. The stigma around incontinence appears to be fading, products are advertised on primetime TV, and brands are creating new designs that are more stylish and sophisticated. As the population ages, incontinence products are only going to go even more ...

## Food Safety, Regulations and Labeling - All Regions

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## Gifting in Beauty and Personal Care - UK

“New product development in BPC gift sets has declined in recent years, with consumers showing a preference for individual products. This may be partly driven by a desire to reduce waste, which extends to packaging. Mintel’s research shows high consumer interest in functional as well as reduced packaging. Women remain ...

**This month's European Retail Briefing includes:**

## Fast Casual Restaurants - China

“Although growing dramatically, China’s fast casual market is still in a stage of infancy. Existing fast casual brands should focus on workday lunch as well as explore other occasions, especially workday dinner and late-night meal. There is also opportunity in the market for more Chinese-style fast casual brands providing inviting ...

## Festival Shopping - China

“Festivals are reshaping consumers’ spending patterns, especially online shopping festivals. Greater spending power and choice are driving individualisation among consumers and the need for innovation by retailers and brands. Demand for better quality experiences is also driving the convergence of festival shopping with festive entertainment into so-called “retailtainment”. Travel spending ...

## Fruit and Vegetables - International

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## Haircare - China

“The premiumisation of shampoos and conditioners actually poses threats to the development of hair treatment products. With more and more shampoos including advanced claims such as scalp care, nourishing or aromatherapy, consumers may feel no need to employ extra products. Brands need to make more efforts to give hair treatment ...

## Hispanics and American Culture and Identity - US

"Hispanics will continue to gravitate toward biculturalism. Communications technology such as social media allows US Hispanics to stay connected with family members in other countries. Meanwhile, the sizable and relatively young market creates opportunities in the US for Hispanics to keep their culture alive through daily interactions. Hispanic moms' will ...

## Household Paper Products - US

"The US household paper market has shown only modest growth since 2012, due to limited usage among younger generations of discretionary products, more premium private label offerings, and challenges in differentiation in a highly functional category. Expanding appeal to younger, dynamic consumer groups, including parents and Hispanics, will hinge on ...

## Ingredients and Additives - All Regions

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## Investment Products - Canada

"Socially responsible investing may be undergoing a rebirth as progressive segments of the population evince a greater interest in ethical screening of investments"

– **Sanjay Sharma, Senior Financial Services Analyst**

## Loans & Alternate Sources of Credit - Ireland

"Together with economic growth, rising employment and increased consumer confidence, low interest rates – particularly for NI consumers – have returned growth and momentum to the unsecured personal loans market. However, lingering uncertainties around the eventual

## Holiday Review - UK

"Rising inflation, more expensive oil, and a fluctuating Pound will weigh on consumers' spending power in 2018. We expect to see a slight reduction in the growth of overseas trips as some consumers opt for staycations instead of short breaks during the low seasons. We could also see more consumers ...

## Ice Cream - All Regions

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## International Food Trends - US

"International cuisines, flavors, and ingredients continue to be an area of opportunity in both foodservice and retail. Young consumers in particular represent a key opportunity as they show high interest in international foods but lack the skills required to actually cook international cuisine at home. While many consumers still prefer ...

## Juice and Juice Drinks - All Regions

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## Lotteries - UK

"Sliding sales of National Lottery draw games and scratchcards have damaged the market as a whole but could usher in a new period of innovation as Camelot scrambles to recover and its rivals look to cash in."



impact of Brexit, in particular, have resulted in some consumers postponing plans to borrow ...

## Managing Your Health - US

Consumers and brands alike are talking about wellness in the face of an uncertain healthcare market and growing health issues. To bring down healthcare expenses, health management is increasingly placed in the hands of consumers who are turning to a variety of sources to improve their wellbeing and receive guidance ...

## Marketing to Middle Americans - US

Middle Americans make up nearly half of the population and reflect the average in terms of their household income and level of education. This group is crucial for marketers to understand, given their size, but they can be hard to define because their attitudes and behaviors occupy a middle ground ...

## Marketing to Pet Owners - China

"The pet industry will continue on an upward trajectory, especially related to cat ownership. This is because people want to fill the emotional void in their lives (eg parenthood) without completely changing their lifestyles. As pet owners value animals' companionship a lot, marketing communications and product benefits could be around ...

## Meat Alternatives - Canada

"Meat alternatives can be viewed as being the tip of the spear in terms of food innovation. While there's no indication that Canadians will shun meat 'en masse' any time in the near future, consumers increasingly want more flexibility in their diet. Limiting meat consumption is one form of flexibility ...

## Mobile Network Providers - UK

"Competition from MVNOs has driven down prices, while an increasing tendency to buy smartphones outright has given consumers more flexibility in their contract choice. The importance of data allowances has sustained the market but increased personalisation and

## Marketing para a Classe Média - Brazil

"Mesmo com ligeira melhoria na economia, os brasileiros da classe média ainda estão receosos em relação a seus gastos e hábitos de consumo. Isso os leva a buscar formas de economizar no momento da compra e também de fazer em casa, de maneira mais econômica, aquilo que costumavam fazer fora ...

## Marketing to Millennials - Canada

"As Millennials grow up, they report a good level of confidence in their ability to take care of themselves, their families and in their parenting skills. Canadian Millennials are highly optimistic about their personal opportunities, yet may lack the financial knowhow to move them forward and attain their financial goals ...

## Marketing to the Middle Classes - Brazil

"Even with a slight improvement of the economy, the Brazilian middle class is still cautious toward its spending and consumption habits. These consumers are looking for ways to save money when shopping all kind of items and are also doing at home, in the most economical way, what they used ...

## Meat, Poultry and Fish - International

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## Nail Color and Care - US

The nail care and color market has declined since 2014, with substantial losses in the key segment, nail color. While category engagement is struggling as a whole, consumer concern around the damage of frequent polishing and growing interest in ingredient

the rewarding of long-term customers will be vital as the growth of eSIMs ...

## Nutrition, Health and Wellness - International

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## Pasta, Rice and Noodles - All Regions

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## Pet Food - All Regions

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## Prepared Meals and Pizza - International

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## Retail Venue Catering - UK

"The UK's love of eating out is providing opportunities for retailers to move into this sector. The boundaries of retail venue catering are increasingly being pushed with a simple supermarket café likely to become a thing of the past. Consumers are used to eating out regularly and in a bid ...

formulations is evident in the success of artificial nails and ...

## Oil Change Retail - US

"The oil change retail market is an extremely significant portion of the automotive aftermarket. In order to remain operational, internal combustion engine (ICE) vehicles must undergo regular maintenance and oil changes. The oil change retail industry is a large market, with a wide variety of oil change providers ranging from ...

## Perceptions of Auto Brands - Canada

Brand perceptions for automotive manufacturers are critical to success since consumers are infrequently in the market for a vehicle. Gas mileage, safety ratings, reputation and past experiences are key factors that play a role in shaping consumers' perceptions of car brands. Operators in the category face hurdles such as bad ...

## Plant-based Proteins - US

"Consumers are open to plant-based alternative proteins, and while they recognize health concerns as a distinct selling point for these, they will not waver when it comes to taste. There may well be significant opportunity to leverage the flavors of Hispanic cuisines, as there is a strong degree of interest ...

## Private Label Food and Drink Trends - US

"Sales of private label food and beverages have risen only modestly in recent years, roughly keeping pace with sales of food and beverages overall. The pace of growth, however, could pick up in coming years as retailers look to their store brands to strengthen their value propositions amid intensifying competition ...

## Retirement Planning - UK

"As people continue to live longer and the government moves to limit the burden on the state, effective retirement planning will become more important than ever before. Older people are working for longer, whether out of necessity or choice. Initiatives such as the Pensions Dashboard will help encourage people to ...



## Salty Snacks - International

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## Soup - International

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## Sugar and Gum Confectionery - UK

"With volumes sales of sweets expected to continue to fall, the onus is on companies to encourage trading up within the category. The premium end of the market, however, remains underdeveloped – despite strong consumer demand – creating ripe opportunities for innovation in this area. High quality ingredients, sophisticated flavours ...

## Table Sauces, Seasonings and Oils - All Regions

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## Television Advertising - US

"Many online adults viewed a commercial via linear television in the last week, and these ads continue to have a powerful influence; the majority of viewers for every category surveyed have had some positive responses to commercials, including the desire to learn about new products and gain new insight into ...

## Seasonal Dining Trends - US

Seasonal menu items are associated with a positive, treat-based sentiment, which makes them a key focus for foodservice operators. However, with retail maintaining an edge when it comes to seasonal purchases across a variety of categories, foodservice operators need to understand the preferences and demographics of seasonal consumers, while also ...

## Sports and Energy Drinks - All Regions

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## Sweet and Savoury Spreads - All Regions

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## Tea - International

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## The Arts and Crafts Consumer - US

"Participation in the arts and crafts space remains stable. In 2017, many adults participated in at least one type of arts and crafts activity, with painting/drawing/coloring as the most popular type. The market is propelled by young, female crafters who are motivated to make projects for themselves and ...

## The Working Life - UK

"The UK workforce has continued to grow in recent years, while unemployment has tumbled to record lows. However, while this is undoubtedly a positive economic indicator, the UK continues to struggle with poor productivity levels, with productivity growth only hitting pre-recession levels in Q3 2017. Increased workplace flexibility and a ...

## Unsecured Loans - UK

"The unsecured loans market has experienced continuing growth over the last five years due to strong consumer confidence and record-low interest rates. However, looking ahead concern over rising levels of household debt has resulted in government intervention which may slow growth in this market".

## Wine, Spirits and RTDs - All Regions

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## 休闲快餐店 - China

"中国休闲快餐市场虽然飞速发展，但仍处于初级阶段。现有休闲快餐品牌应重点关注工作日午餐，同时探索其他场合，尤其是工作日晚餐和夜宵场合。此外，市场中尚有更多中式休闲快餐品牌的增长空间，中式餐饮品牌可以通过提供愉悦的餐厅氛围、有趣的用餐体验和高端食材来打造休闲快餐厅。"

— 陈杨之，研究分析师

## 洗发护发产品 - China

"洗发水和护发素的高端化其实为头发护理产品的发展带来威胁。市场上带有进阶宣称如头皮护理、滋养、香熏疗法等的洗发水有增无减，消费者可能也就不觉得需要再使用额外产品。品牌需要赋予头发护理产品更独特的价值主张，例如利用沙龙或护肤概念所带来的感官体验，或与特定使用时机做连结，像是可于吹干头发前使用，好让消费者觉得该产品有使用必要。"

— 李玉梅，研究分析师

## UK Retail Briefing - UK

"Christmas was OK, but no better than that. Food retailers outperformed non-food retailers and online grew strongly. So far we have had good figures from the leading food retailers, Aldi and Lidl, John Lewis and a handful of smaller clothing retailers. We have had poor figures from Debenhams and bad ...

## Water - International

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## Yogurt and Desserts - All Regions

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## 对住房需求的态度 - China

"中国年轻人，尤其是90后，对租房的接纳程度更高。不过，这是因为他们在租房时愿意将更多的收入用于提升生活居住品质。他们仍强烈渴望拥有自己的住房。为了吸引他们，关怀其压力重重的生活，让其有机会展示归属感（如对家乡）是良机。"

— 过人，研究副总监，中国

## 节日购物 - China

"节日正在重塑消费者的支出模式，尤其是网络购物节。更强大的消费能力和更丰富的选择提升了消费者对个性化的追求，以及对零售商和品牌的创新要求。对更卓越体验的需求也催生了节日购物与节日娱乐的融合，即所谓的'娱乐式零售'。旅游度假支出也让中国的节庆购物国际化。这在为零售商和品牌带来新机遇的同时也给其制造了挑战。零售商必须取得传统与变革、送礼和自用，以及购物和娱乐、对网络购物节不屑与兴奋间的平衡。"

## 针对宠物主人的营销 - China

"宠物业发展持续攀升，尤以养猫增势最猛。原因在于现代人期待填补心灵的空缺（如养儿育女），但又不想生活方式整体改变。既然宠物主十分在乎动物的陪伴，营销宣传和产品功效就可环绕在宠溺和疼惜宠物之上，而不是为了省时却淡化了宠物与主人之间的互动。"

— 马子淳，高级研究分析师