

THE FUTURE OF PREPARED MEALS, PIZZA AND SOUP: 2019

Global Annual Review: what's now and what's next for the prepared meal, pizza and soup market.



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Drink



Report Content



- A look back, and a look ahead

THE BIG STORIES

- Mintel's perspective

Plant-based goes mainstream

- Vegan innovation growing in all regions
 - Graph 1: percentage change in penetration of vegetarian and vegan claims in new soup, pizza, prepared meal and meal kit innovation between Jan 2014 and Dec 2018, by region
- Offering a veggie boost can appeal to non-vegans
- US consumers demand plant power, but prepared meals haven't kept up

Animal welfare becomes more important

- Ethically sourced meat can help ready meals stand out
- Brazilian meat scandals have had major implications both internationally and domestically
- Globally, animal welfare claims are making their way into prepared meals
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Meals get more 'snackable'

- Snacking/eating meals on the go is becoming the new normal
- Meal manufacturers making it easier to eat on the move
- Campbell's innovates around portability in ambient soup

IN THE NEXT TWO YEARS

- Mintel's perspective

Foodservice will drive retail innovation

- Foodservice brands will breathe new life into prepared meals
- Ambient hot pot will get healthier in quest for restaurant quality
- The foodservice factor will continue to manifest in prepared meals
- Expect Southeast Asian cuisine exploration in the UK

Consumers will seek elevated convenience

- Consumer demand for convenience will drive meal kit innovation in new day-parts
- Kits can solve meal dilemmas throughout the day
- Convenience store meal kits give consumers reasons to make more visits

The new face of frozen food

- Frozen food will continue to shake off over-processed image
- More brands could promote the naturalness of frozen foods in Asia Pacific
- Opportunity for clean label frozen soup to benefit from the decline in canned soup
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 - Graph 2: % of consumers that associate 'Natural' with different types of soup, 2018

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- 'Circularity' is the new sustainability
- Meat/poultry fed on waste produce could add an extra 'ethical' layer to meals
- European private label prepared meals have a large role to play in upcycling ingredients
- Foodservice operators highlight the virtues of waste reduction

KEY MARKET DATA

- Biggest ready meal and pizza markets by volume in 2018
 - Graph 3: Ready meals and pizzas, 10 biggest markets by volume, 2018
- Biggest prepared soup markets by volume in 2018
 - Graph 4: Prepared soup, 10 biggest markets by volume, 2018
- Fastest growing ready meal and pizza markets
- Fastest/slowest growing ready meal and pizza markets
 - Graph 5: Ready meals and pizzas, fastest/slowest growing markets (5-year CAGR)
- Fastest growing prepared soup markets
- Fastest/slowest growing prepared soup markets
 - Graph 6: Prepared soup, fastest/slowest growing markets (5-year CAGR)
- Top claims in prepared meals, meal kits, pizzas and soups
- New product launches by storage type
 - Graph 7: Prepared meals, meal kits, pizzas and soups, new product launches, by storage type, by region, Jan 2018-Dec 2018

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