

THE FUTURE OF PREPARED MEALS, PIZZA AND SOUP: 2020

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

Beware of the plant-based backlash

- Consumers seek naturalness in all food, and vegan options are no exception
- Chipotle deem plant-based meat alternatives too highly processed
- Go back to basics with 'real' plants

Plastic prevails as public enemy no. 1

- Consumers hold manufacturers responsible for reducing plastic pollution
- Private label leads the charge towards plastic-free aisles in Europe
- Patent activity suggests biodegradable food and drink packaging will increase
 - Graph 1: penetration of compostable and biodegradable packaging claims in food and drink launches, Jan 2017-Dec 2019

Shelf-stable products get a shake-up

- The challenges facing ambient meals are best displayed in the Asia Pacific region
 - Graph 2: split of prepared meal launches by storage type, Jan 2015-Dec 2019
- Tap into the latest food trends to keep ambient meals relevant
- Ambient soups with functional health benefits target specific consumer needs
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IN THE NEXT TWO YEARS

- Mintel's perspective

Premium products get ethical upgrade

- Premium products are particularly meat-heavy
 - Graph 3: % of product launches containing meat or fish, premium prepared meals and pizzas vs non-premium meals and pizzas, Jan 2017-Dec 2019
- Provenance and speciality ingredients can premiumise vegan products
- Ethical standards of meat in premium products could be elevated
 - Graph 4: penetration of 'ethical – animal' claims in prepared meal, pizza and wet soup innovation, by region, Jan 2015-Dec 2019

Meal kits get 'smarter' in a saturated market

- Meal kit brands must differentiate to stand out
 - Graph 5: meal kit innovation, by country, 2017-19
- Offer ultimate convenience by making meal kits smart kitchen-compatible
- Offer ultimate convenience by making meal kits smart kitchen-compatible
- Affordability must be addressed for mass-market appeal

Interest in brain health boosts Mediterranean diet

- Consumer attention increasingly turns to proactively protecting long-term health
- Mediterranean diet references will grow in relation to cognitive function
- Manufacturers focus on cognition-boosting ingredients in line with Mediterranean diet

IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Interest in personalised diets paves the way for customisable meal kits
- Planetary health diets will drive the innovation agenda
- Scientific advancements that improve taste and texture will make food engineering more palatable

KEY MARKET DATA

- Biggest ready meal and pizza markets by volume in 2019
- Biggest ready meal and pizza markets by volume in 2019
 - Graph 6: ready meals and pizzas, 10 biggest markets by volume*, 2019
- Biggest prepared soup markets by volume in 2019
- Biggest prepared soup markets by volume in 2019
 - Graph 7: prepared soup, 10 biggest markets by volume*, 2019
- Fastest/slowest growing ready meal and pizza markets
 - Graph 8: ready meals and pizzas, 5 fastest and 5 slowest growing markets, next five years (volume CAGR)
- Fastest/slowest growing prepared soup markets
 - Graph 9: prepared soup, 5 fastest and 5 slowest growing markets, next five years (volume CAGR)
- Per capita consumption of prepared meals, pizza and prepared soup
- Top flavour components in global soup launches

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