

WORLD CUISINES – UK – 2024

Low prices and authenticity continue to appeal widely in the market in 2024. Regional flavours, British dishes with a twist and meat reduction hold future potential



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World Cuisines – UK – 2024

This report looks at the following areas:

- The impact of the income squeeze on the market and the outlook for the next five years
- Key trends in recent launch activity and future opportunities
- Usage of world cuisines at home
- Choice factors when buying world cuisine products, including the appeal of low price and authenticity
- Behaviours related to world cuisines, including interest in traditional British dishes with a world cuisine twist and meat-free world cuisine options.



Low prices and authenticity continue to appeal widely in the market in 2024. Regional flavours, British dishes with a twist and meat reduction hold future potential

Overview

World cuisines products in retail have benefited during the income squeeze from being an affordable way to enjoy foods often sought in foodservice. Despite this, the impressive value growth in 2023 was fuelled mostly by inflation. Growth slowed in 2024 as price rises eased. Future improvements in financial confidence will trigger renewed competition from restaurants and takeaways, but also facilitate trading up in the category.

The majority of world food users reporting to be adventurous when it comes to trying new world cuisine dishes will enable less established cuisines to strengthen their foothold in the market going forward. However, this will be at the expense of more established cuisines like Indian and Chinese, unless they are able to offer constant newness.

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Regional dishes hold potential here, with **78%** of world food users interested in such products. Exploring regional nuances will not only deliver a sense of newness in established cuisines, but also appeals to those looking for authenticity.

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Report Content



EXECUTIVE SUMMARY

Opportunities for the world cuisines market

- Regional dishes appeal widely to world cuisine users
- Scope to break the rules within world cuisines
- Half of world cuisine users are looking for meat-free tips

Market dynamics and outlook

- Market size & forecast
- Market predictions for world cuisines
- Value sales are set to grow over the next five years
- Value sales accelerated in 2023 and continue to rise in 2024
 - Graph 1: retail value sales of world cuisines, 2019-24
- Frozen ready meals were big winners in 2023
 - Graph 2: retail sales of world cuisine foods, by format, 2022-24
- Indian cuisine retains lead, Mexican was the star performer in 2023
 - Graph 3: retail sales of world cuisine foods, by cuisine type, 2022-24
- Own-label continues to dominate in world cuisines, The Spice Tailor performs well in Indian
 - Graph 4: leading brands' in the Indian ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24
- Blue Dragon retains top position, Wagamama and Yo! see strong growth in Chinese and other Oriental
 - Graph 5: leading brands' in the Chinese and other Oriental ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24
- Old El Paso remains the top brand in Mexican cuisine
 - Graph 6: leading brands' in the Mexican ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24
- Commitment to healthy eating grows among consumers
 - Graph 7: how often people try to eat healthily, 2017-22 and 2024

What consumers want and why

- Usage of world cuisines remains high in 2024
 - Graph 8: world cuisines eaten at home in the last three months and interest in eating world cuisines in future, by cuisine, 2024
- Chinese and Indian cuisines remain most popular
 - Graph 9: overall usage of world cuisines, by cuisine type, 2019, 2022 and 2024
- Seasonings/spices and shortcut products stand neck and neck for use on everyday occasions

- Graph 10: types of world cuisine products eaten or used at home on an everyday occasion in the last three months, 2024
- Low price and authenticity are top attributes looked for in world cuisine products
 - Graph 11: choice factors when buying world cuisine products, 2024
- Foodservice inspiration remains crucial for retail
- Many tend to stick to the same world cuisine products
 - Graph 12: behaviours related to world cuisines, 2024

Innovation and marketing

- Leading players broaden their ranges
- Grocers continue to expand their world cuisines repertoires
- Retailers expand their world cuisine offering
- Adspend jumps in 2023
 - Graph 13: total above-the-line, online display and direct mail advertising expenditure on selected world cuisine brands, by advertiser, 2021-24

MARKET DYNAMICS

Market size

- Retail value sales of world cuisines
- Value sales accelerated in 2023...
 - Graph 14: retail value sales of world cuisines, 2019-24
- ...and continue to rise in 2024

Market forecast

- Value sales to grow between 2024-29
- Value sales are set to grow over the next five years
- Positive longer term outlook for world cuisines

Market segmentation

- Frozen ready meals were the big winners in 2023
- Frozen ready meals post strongest value growth in 2023
 - Graph 15: retail sales of world cuisine foods, by format, 2022-24
- Main cuisine types see value growth...
 - Graph 16: retail sales of world cuisine foods, by cuisine type, 2022-24
- ...however Mexican was the star performer in 2023 and 2024

Market share

- Own-label continues to dominate in world cuisines
 - Graph 17: leading brands in the Indian ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24

- Patak's remains top brand in Indian, The Spice Tailor outperforms segment
- Blue Dragon retains top position in Chinese/other Oriental cuisine
 - Graph 18: leading brands in the Chinese and other Oriental ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24
- Strong performance from Wagamama and Yo!
- Old El Paso remains the top brand in Mexican cuisine
 - Graph 19: leading brands in the Mexican ready meals, cooking sauces and ingredients/accompaniment market, by value, 2021/22-23/24
- Nando's sees value sales drop in 2023/24

Macro-economic factors

- Wages grow ahead of inflation
 - Graph 20: CPI inflation rate and total pay growth rate, 2021-24
- Financial wellbeing falls back
 - Graph 21: the financial wellbeing index, 2016-24
- Sauces and spices experience high inflation in 2023
 - Graph 22: CPI annual rate, ready meals, sauces, condiments, salt, spices and herbs, restaurant meals and all foods, 2016-24

Social, environmental and legal factors

- Government measures on HFSS slow to roll out
- HFSS will have mixed effects on world cuisines category
- Commitment to healthy eating continues to grow among consumers
 - Graph 23: how often people try to eat healthily, 2017-22 and 2024
- Media spotlight fuels concerns around ultra-processing
- Interest in sustainability expected to rebound

WHAT CONSUMERS WANT AND WHY

Usage of world cuisines at home

- Usage of world cuisines remains high in 2024
 - Graph 24: world cuisines eaten at home in the last three months and interest in eating world cuisines in future, by cuisine, 2024
- Younger groups are core users...
 - Graph 25: eating world cuisines at home, by age and children in the household, 2024
- ...as are families
- Chinese and Indian cuisines remain most popular...
 - Graph 26: overall usage of world cuisines, by cuisine type, 2019, 2022 and 2024
- ...but see usage fall

- Seasonings/spices and shortcut products stand neck and neck for use on everyday occasions
 - Graph 27: types of world cuisine products eaten or used at home on an everyday occasion in the last three months, 2024
- Budget appeal of home cooking and the need for speed drive usage

Choice factors when buying world cuisine products

- Low price and authenticity are top attributes looked for in world cuisine products
 - Graph 28: choice factors when buying world cuisine products, 2024
- Low price appeals widely to world cuisine users
- Offering value for money will be key even after financial confidence improves
 - Graph 29: world cuisine users looking for low price, by financial situation, 2024
- Sharwood's offers cues in highlighting how world cuisine sauces can be a part of an affordable meal
- Authenticity remains sought after in world cuisines
- Regionality appeals widely to world food users
- High interest in regional dishes
- Established players have explored regionality
- Newer entrants offer cues on spotlighting regionality
- Highlight unique qualities of regionality
- Scope to break the rules in world cuisines products and dishes
- Foodservice inspiration remains crucial for retail
- Social media plays a substantial role among younger demographics

Behaviours related to world cuisines

- Many tend to stick to the same world cuisine products
 - Graph 30: behaviours related to world cuisines, 2024
- Familiarity is a key theme for world cuisine eaters
- Spotlight quick and familiar cooking techniques
- Familiar ingredients will be key in prompting trial of new world cuisine dishes
- Many find a traditional British dish with a world cuisine twist appealing
- Traditional British dishes with a world cuisine twist appeal widely
- Traditional products can tap into consumer interest for world cuisines
- Many world cuisine users are looking for meat-free tips
- Half want advice on how to make meaty world cuisine dishes meat-free
- Spotlight meat-free suitability front of pack
- Patak's offers meat-free meal inspiration
- Position meat-free as a way to save money

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Leading grocers continue to feature world cuisines in recent NPD
- Sainsbury's and Tesco explore meal kit partnerships
- M&S continues to explore pan-Asian cuisine
- Schwartz partners with TV chef Nadiya, OXO extends marinades
- Gymkhana and Aagrah Foods secure new listings
- Pinch and Gymkhana look to bring restaurant-quality to the home
- Leading players expand their ranges
- Sun Hee extends range into Tesco stores, Ocado expands Korean offering
- Waitrose launches Menyu range, collaborates with Yotam Ottolenghi
- Tesco and Heinz look to tap into popularity of Mexican cuisine
- Tilda and Florette launch new formats with a world cuisine focus
- Heinz launches Las Chicas, Tilda and Florette expand portfolio
- Patak's and Ben's Original look to offer quick meals
- Seasonal NPD continues to explore world cuisines flavours

Advertising and marketing activity

- Adspend jumps in 2023
 - Graph 31: total above-the-line, online display and direct mail advertising expenditure on selected world cuisine brands, by advertiser, 2021-24
- Old El Paso supports Team GB in campaign
- Old El Paso encourages users to 'make Some Noise for your Home Team'
- Tilda supports Tasty Sides launch
- Kikkoman launches summer campaign
- Blue Dragon supports Pad Thai kit

APPENDIX

Supplementary data

Market segmentation

- UK: retail sales of world cuisine foods, by cuisine and format, 2022-24

Market forecast data and methodology

- Value market size and forecast: world cuisines, 2019-29
- Forecast prediction intervals – value
- Forecast methodology

Market share

- UK: retail sales of leading brands in Indian cuisine, by value, 2021/22-23/24
- UK: retail sales of leading brands in Chinese and other Oriental cuisine, by value, 2021/22-23/24
- UK: retail sales of leading brands in Mexican cuisine, by value, 2021/22-23/24
- UK: retail sales of leading brands in other world cuisines, by value, 2021/22-23/24
- UK: retail sales of leading manufacturers in Indian cuisine, by value, 21/22-2023/24
- UK: retail sales of leading manufacturers in Chinese & other Oriental cuisines, by value, 2021/22-23/24
- UK: retail sales of leading manufacturers in Mexican cuisine, by value, 2021/22-23/24
- UK: retail sales of leading manufacturers in other world cuisines , by value, 2021/22-23/24

Advertising spend

- UK: total above-the line, online display and direct mail advertising expenditure for selected world cuisine brands, by advertiser, 2021-24

Report scope and definitions

- Products covered in this report
- Abbreviations and terms
- Consumer research methodology
- Nielsen Ad Intel coverage

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