

The Grocer

Focus On World Cuisine: by Natalie Brown (natalie_brown@live.co.uk)

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The Story

Ethnic ready meals are in strong growth with more familiar cuisines such as Italian and Indian gaining the most ground over the past year. So, are Brits opting for the bog standard spaghetti bolognese or chicken tikka masala? Or are they sampling more exotic dishes from this region? Does this trend continue when it comes to cooking from scratch? Or are Brits broadening their horizons? What are the more adventurous among us cooking up? What flavours, dishes and cuisines are likely to dominate in the year ahead?

Key themes:

Cuisines: Italian and Indian cuisines have seen the biggest growth in chilled ready meals this year. How come? Which other cuisines are doing well and why? And which ones are struggling? Are these trends reflected in other areas of grocery?

Premiumisation: Premiumisation has been big in ready meals for some time now, but the trend is still gathering pace – Budgens recently announced it was adding 20 premium lines to its ready meal offering. How are other brands and retailers tapping into this?

Meal kits: Last year we reported on the concept of semi-scratch cooking and the rise of recipe delivery services. One year on, how are these companies faring? Have a raft of new companies hit the scene? How are retailers tapping in to the demand for recipe kits?

Price and promotions: How have promotional tactics changed in chilled ready meals? Branded ready meals have seen an increase in price while own label is down slightly. Why? Looking at the individual cuisines changes in average prices vary hugely. Why is Spanish down when Italian is up? Have specific ingredient prices been affecting these sectors?

Retailers: The discounters are in huge growth and sales at M&S and The Co-op aren't looking to shabby either. So, how have retailers changed their world cuisine offerings over the past year? How have they developed own label and branded ranges to tap into the key trends? What will they be doing over the next 12 months to ensure further growth?

Brands v own label: Both branded and own label have had a good year, winning value and volume growth. Branded is out performing own label, in value growth at least. How have brands fought back in a sector dominated by own label? Who's been leading the charge here? What trends have they been tapping into? On own label which retailers are dominating? How have retailers changed their ranges over the past year?

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market. We will profile four of the most interesting new launches in a separate innovation panel.

Sub sectors: Not just ready meals: In this feature we will also be analysing everything from ethnic meal kits, pastes, marinades, sauces and recipe mixes. The feature will also look at key consumer trends affecting this category: how is health playing a role here? And which cuisines are seeing the most new products? In ingredients, which is seeing the biggest growth and why? Which ones aren't doing so well?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest players have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Health: Ready meals have convinced consumers they can be posh, but can they persuade them that they're healthy too? Over the past year a number of retailers have brought out ranges of chilled ready meals that are advertised as healthier than their counterparts. So, how are these ranges performing?

Religious festivals: Festivals such as Eid, Diwali and Ramadan can present huge opportunities for retailers, particularly in the world food section. So how are they tapping into this? Which products are they pushing and for what occasions? Have they upped promotions and activity around these events over the past year?

Thai and Oriental: Chinese won't cut it any more. Brits are moving away from the cuisine in search of more refined foods. As such, Oriental and Thai are gathering pace. Why? Are there any particular dishes leading this trend? How are brands and retailers looking to exploit this?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?
- We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.