Asia Pacific
The Food and Drink Landscape

The latest market research, product innovation insights and consumer trends from across the Asia Pacific food and drink industry.
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Flower power in the beverage marketplace

Flower ingredients are increasingly used as an element to popularise drinks in China.
The novel use of floral ingredients in packaged beverages is an opportunity that manufacturers and brands in China can further explore.

Indeed, Mintel research shows that Chinese consumers have a positive perception of flowers as natural and light flavourings and a quarter say they want to drink more floral tea in the future. Beyond the tea category, Mintel research also reveals that a third of soft drinks consumers in China have expressed interest in carbonated soft drinks innovations with floral flavours.

What is more, Mintel Global New Products Database (GNPD) reveals that new drink product launches that are floral-flavoured are on the rise in China: 28% of drink launches in 2018 were floral-flavoured, up from just 15% in 2014.

To tap into the appeal of floral ingredients among consumers, beverage manufacturers and brands should consider either using floral flavours that are already established, such as rose or osmanthus, or exploring new flavours in their natural plant-based products.

32% of soft drink consumers in China are interested in carbonated soft drinks with floral flavours.
SAKURA MAKES WAVES IN CHINA

The trend of using sakura as a flavour in food and drink products originated in Japan, a country with strong cultural attachment to the flower. Each Spring, sakura-themed products occupy Japanese retail shelves to welcome the sakura blossom.

However, sakura only recently made its way to China after Coca-Cola launched its sakura-flavoured variant in 2018. Though only available in Japan at the time, the interesting flavour of the drink and design of the bottle earned Coca-Cola Sakura Cherry Blossom Spring 2018 fast internet fame in China and became available on Taobao via Daigou.

As a result, Spring 2019 saw a string of sakura-related product launches in the Chinese marketplace. Starbucks, for instance, released a series of seasonal products that were sakura-themed, including a sakura-flavoured latte, cakes, as well as sakura-designed mugs—all of which became viral hits among China’s younger consumers.

Besides trending in the foodservice industry, the country also saw the launch of sakura-flavoured instant milk tea by Lipton and a light sakura – and brandy-flavoured packaged cocktail by Rio.

Starbucks Cherry Blossom Flavoured Latte  
Lipton Ying Cherry Blossom Flavoured Milk Tea  
Rio Cherry Blossom and Brandy Flavoured Light Cocktail
LEVERAGING THE FUNCTIONAL BENEFITS OF SUPER FLOWERS

Besides acting as natural flavouring ingredients, some flowers are known in China for their health benefits—made popular by the practice of traditional Chinese medicine (TCM).

Chinese people have a long tradition of using herbal ingredients for medicinal and treatment purposes. Some flowers are even listed in the ‘bible of traditional Chinese medicine’ as being effective for improving one’s health or treating a disease, including Chrysanthemum, rose and honeysuckle. This functional perception of flowers can be leveraged by companies, brands and manufacturers in their modern drink launches to appeal to consumers seeking health benefits given that a third of soft drink consumers in China say that they are interested in innovative soft drinks made with traditional Chinese medicine.

33% of Chinese soft drink consumers are highly interested in soft drinks that incorporate traditional Chinese medicine.

FUNCTIONAL FLOWERS IN DRINKS

Vita Chrysanthemum Tea Drink
Chrysanthemum is known for cooling and removing inner heat.

Momchilovtsi Rose Flavoured Yoghurt
The beauty benefits that roses provide are highlighted in this drink. In TCM, roses are used to treat digestive disorders and menstrual irregularities.
It’s time to reduce sodium levels in condiments. Southeast Asians are worried over excessive salt intake.
Consumption of salted and fermented foods has long been part of the traditional food cultures found in Southeast Asia. Sauces and seasonings play an integral role in the diets of many of these consumers—and sodium is found in many popular Southeast Asian sauces and seasonings, like fish and soy sauce.

According to the Institute for Health Metrics and Evaluation, the consumption of excessive sodium, linked to cardiovascular and high blood pressure, is in fact the world’s leading cause of diet-related death. The study also shows Southeast Asia is home to a higher-than-average death rate attributed to a high-sodium diet.

Aware of the effects of high sodium intake, a third of urban Thai consumers intend to avoid salt in their diets, according to Mintel research. Meanwhile, almost seven in 10 urban Thais and Indonesians, respectively, say that they avoid salt to stay healthy.

In response, some major brands have started to lower the sodium levels in their products and are also offering reduced-sodium options.

Globally, Nestlé said it is committed to further reducing the sodium in its food and beverage products, such as Maggi Chili sauce, by an average of at least 10% by 2020. The multinational has been working towards sodium reduction since 2005 and has ‘significantly reduced’ the sodium in its culinary products and breakfast cereals. In Southeast Asia, Thai sauce company Yan Wal Yun offers a range of reduced-sodium sauces and seasonings under its Healthy Fit range. Meanwhile, Reduced Salt Light Soy Sauce from Tai Hua Food, one of Singapore’s leading soy sauce brands, contains 40% less sodium.

However, Mintel GNPD shows that such launches are missing from retail shelves, suggesting that more can still be done.

7 in 10 urban Indonesians say they avoid salt to stay healthy.
CONDITIONING CONSUMERS FOR LOWER-SODIUM FOOD

Some brands have avoided overt reduced sodium claims due to consumer concerns about the taste of lower-sodium products. Companies can tackle salt reduction through a series of smaller changes to sodium levels in their products which consumers may be more likely to accept. Meanwhile, companies with an existing sodium reduction programme are in a more advantageous position in the event that governments decide to impose taxes on sodium-laden foods.

To that end, companies in the sauces and seasonings sector can learn from the beverage industry’s handling of calls for sugar reduction in drinks. In 2018, Fraser & Neave (F&N) in Malaysia reported that it had reduced the amount of sugar contained per ml in all of its beverages by 34% since 2004. As such, they are now better placed to mitigate the impact from the government’s move to impose a sugar tax from July 2019.

In this light, the nutrient criteria on sodium in the Healthier Choice programme across the region can serve as a guide to sodium reduction.

AREAS OF EXPLORATION

Manufacturers can consider leaving out salt when formulating their seasonings. Take for example Bu Nirah Ayam Goreng Fried Chicken Spices from Indonesia, a combination of shallots, garlic, coriander, cumin and pepper that is free from MSG, colourings, preservatives and salt. Meanwhile, Hom-Groon Pork Homemade Stock from Thailand is made with six hour-stewed pork back bones and vegetables, and is said to be free from MSG, artificial colour and flavour, salt, as well as preservatives. The ready-to-eat and 100% natural product is enriched with vitamins, minerals and protein, and is said to be ideal for young picky eaters.

Tackle salt reduction through a series of smaller changes to sodium levels in your products.
Manufacturers can also tap into Southeast Asia’s abundance of coconuts with coconut aminos, which are made from the sap of organic coconut trees blended with sea salt, and are gluten-free, non-GMO, organic and MSG-free. Something to note is that coconut aminos are priced at a premium compared to ordinary or low-sodium soy sauce.

Coconut aminos can be particularly attractive to consumers who are on the keto diet, which is currently trending in Southeast Asia. When following the keto diet, soy sauce’s high salt content can cause fluid retention, and this can be addressed by consuming soy sauce substitutes like coconut aminos.

Mintel Recommends

Despite Southeast Asian governments putting sodium reduction on the public health agenda, many fall short when it comes to making sodium reduction mandatory. This may, however, change in the future, especially since consumers are also voicing their concerns around salt consumption. Sauce and seasoning brands should take the opportunity to spearhead salt reduction one step at a time in order to ensure consumer acceptance and to exercise corporate commitment to improving the health of their consumers.
Instant noodles find opportunity at breakfast

Expanding occasions for consumers to enjoy their instant noodles.
While instant noodles have traditionally been positioned as a snack in India, latest research from Mintel shows manufacturers may be missing an important occasion: breakfast. As many as 38% of Indians have instant noodles for breakfast—significantly higher than the one in five who have instant noodles as a snack.

In comparison to other Asian countries, India has a relatively low per capita consumption of instant noodles, according to Mintel estimates. In this light, exploring breakfast as a consumption occasion can be an opportunity for instant noodle manufacturers to boost interest.

With this potential, brands can shine a spotlight on the breakfast occasion through their marketing efforts in order to change the perception that Indians have of instant noodles. Furthermore, manufacturers can look into introducing instant noodle products that are specifically created for the breakfast occasion.

38% of Indian consumers have instant noodles for breakfast.
BREAKFAST-SPECIFIC INSTANT NOODLES FROM ACROSS ASIA

Nongshim’s Bean Sprout Rice Cup Noodle from South Korea comprises rice noodles, bean sprouts, dried pollack and radish in a refreshing soup. It is said to be perfect for breakfast or as a hangover cure.

CKM’s High Calcium Breakfast Noodles for Children from China are specifically for children aged three and up and the noodles are made with quality wheat.

Unif’s Breakfast Instant Noodle from China can be prepared by boiling for three minutes or microwaving for four minutes. The product is said to be rich in protein, calcium and vitamin E.

Instant noodles are generally not native to India; however, Mintel research reveals that two-thirds of Indians have had instant noodles in the three months leading to August 2018. Per capita consumption may be low, but the penetration of instant noodles is high.

One of the key reasons why instant noodles are popular in the morning could be Indians’ common preference for hot and savoury foods at breakfast time.
CONVENIENCE AND NUTRITION

In addition to their savoury flavour, the appeal of instant noodles for breakfast comes from their convenience. In fact, a quarter of Indians say that they would be encouraged to buy more packaged breakfast if it had a shorter preparation or waiting time. As such, it is essential that instant noodle manufacturers communicate the product’s convenience; one way to do that is to move preparation times to the front of the pack.

Brands can also enhance the breakfast occasion by introducing better-for-you ingredients, which provides credibility to instant noodles, a category that’s still largely considered to be unhealthy.

Mintel research reveals that two in five Indians want balanced nutrition in their packaged breakfast options, while three in five instant noodle consumers say that they would like to see added vegetables in their noodles.

In order to make the breakfast positioning more robust, brands can look at providing added nutritional components like added vegetables or better substitutes to plain flour such as jowar and ragi.

**Mintel Recommends**

*With many Indians now discovering that instant noodles can be more than just a snack option, brands would do well to leverage the breakfast occasion. Manufacturers and brands can specifically position and communicate instant noodles as a good option for breakfast by highlighting the savoury taste and convenience aspects of the dish. In order to strengthen their positioning, they can look at introducing healthier versions that may have added vegetables or better-for-you base ingredients.*

**Three in five** instant noodle consumers in India say they would like to see added vegetables in their noodles.
Healthy-ageing dairy drinks for seniors

The region’s rapidly ageing population is opening up opportunities for dairy companies.
According to Mintel’s Global Food & Drink 2019 Trend ‘Through the Ages’, healthy ageing is emerging as a critical issue in the food and drink industry. Preparing oneself for a longer, healthier lifespan is particularly relevant today as consumers view health and wellness as a holistic, proactive and ongoing pursuit.

Healthy ageing is emerging as an opportunity for the food and drink sector.

Dairy drinks are in a unique position to be marketed as healthy ageing products as they are already perceived by many to be functional and effective for maintaining bone health and preventing osteoporosis. In fact, Mintel research reveals that almost half of Chinese consumers agree that milk is good for the elderly.

As such, there is an opportunity for companies and manufacturers to create dairy drinks that meet the nutritional needs of Asia’s rapidly ageing population who are looking to stay fit and healthy for longer. Indeed, research from Mintel shows that three in five consumers in China aged 55 and older exercise regularly, while more than two in five agree that it is worth controlling what they eat in order to stay young.

72% of Chinese consumers aged 55+ are keeping healthy by exercising regularly.
CREATING FUNCTIONAL PRODUCTS THAT MEET VARIOUS NEEDS

South Korean dairy and beverage producer Maeil Dairies Co. has recently opened a sarcopenia research and development centre. To cater for the growing number of seniors in South Korea, Maeil Dairy plans to invest more in products that meet their dietary needs.

Sarcopenia is the gradual loss of muscle that occurs as part of the ageing process, and can affect mobility. Few dairy drinks are said to help with muscle loss for seniors. In fact, Mintel GNPD reveals that the majority of dairy products aimed at seniors are milk powders positioned towards bone health. This signals white space for further new product development to meet the growing needs of ageing consumers, including a fifth of metro Indonesians and third of metro Thais who associate protein with reducing muscle loss during ageing, according to Mintel research.

While protein is an important part of a healthy diet, it is especially important for healthy ageing. According to the International Osteoporosis Foundation, older adults need a higher protein intake than their younger cohorts as they tend to consume a lower calorie intake which may lead to pronounced protein deficiency.

Many dairy brands currently promote protein for weight management and for pre – or post-workouts, but are not highlighting its benefits for healthy ageing. To address this, Nestlé launched globally a high-protein product from their Boost range which targets adults 50 years and older with the slogan ‘Stay strong, stay active’. The dairy drink has 15g of protein to help maintain muscle, and 26 vitamins and minerals, including calcium and vitamin D, to support bone health.

Bone, joint and immune system health are traditionally targeted in products for seniors. Mintel predicts that in the future, brain and eye health will feature more prominently and capture the attention of consumers who are concerned about dementia, memory loss and poor eyesight.

Food and drink formulations can offer alternatives to medicine and medical treatment for seniors, especially those who are not actively treating their health issues. For example, Mintel research reveals that in China, over half of consumers aged between 55-74 suffer from poor eyesight, as well as weak memory, yet are not doing anything about it.
Mintel Recommends

Consumers, especially seniors, want to be empowered by the products that they purchase or consume and do not want their age to be central to the product positioning. Brands should start promoting senior-targeted products positively by using a ‘healthy ageing’ concept and developing products that help seniors stay active, ease body pain, support mobility issues and promote a healthy lifestyle. There is opportunity for further innovation of preventative claims that take a proactive and protective approach to one’s health.

**Nestlé’s Boost Very Vanilla Complete Nutritional Drink** from the US has been relaunched with 33% more protein. This kosher certified high protein product contains 26 vitamins and minerals, 20g of protein for muscle health, and a CalciLock blend of essential nutrients including calcium, phosphorus, magnesium, zinc, and vitamins D, C and K to help maintain strong bones.

**Meiji’s Gold Advance Malt Flavoured Milk from Thailand** is a senior-targeted drink which contains vitamin A (helps with eyesight) and vitamin B12 (supports the nervous system and brain functions). It is packaged in a single-serve ready-to-drink format unlike most senior-targeted drinks that come in powder format.
A year of innovation: Food and drink product roundup

Mintel’s team of global food and drink analysts monitor new product launches from around the globe on a daily basis. From packaging to ingredients, here we share some of the most innovative food and drink launches to come out of Asia Pacific in the past year.
Check Check Cin’s Rice Water Gift Set, Hong Kong
In TCM, rice water can improve fatigue, lack of appetite and bloatedness. This gift set comes with two variants: a dawn rice water and a dusk rice water. The ready-to-drink rice water product is said to be the first packaged rice water on the market and also the first to be formulated in line with the TCM concept of an organ clock which holds the belief that each organ has a time of day when it functions optimally. Dawn rice water is best consumed between 7 and 11am for the stomach and spleen, and dusk rice water between 7 and 9pm for the kidneys. This product taps into Mintel’s 2017 Global Food & Drink Trend ‘In Tradition We Trust’ which highlights how consumers are seeking comfort from modernised updates of age-old formulations, flavours and formats.

The Bloom Theory’s Mash Tun Crackers, New Zealand
These crackers rely on branding and on-pack communication to tell the story of their spent grain ingredients. ‘Mash tun’ is the vessel used in brewing to combine ground malt with water. While companies have been finding ways to repurpose or resell waste or spent ingredients to maximise profits, it is only relatively recently that they have started to actively promote where those ingredients are going. This product illustrates Mintel’s 2019 Global Food & Drink Trend ‘Evergreen Consumption’ which highlights a circular economy where resources are kept in use for as long as possible. There is clearly opportunity for companies to investigate where and how their waste ingredients can be repurposed into new, on-trend food and drink.

Soulfull’s Almond Flavoured Millet Smoothix, India
This cereal-based beverage is a sugar-free product said to contain 12 all-natural grains including oats, green gram, brown rice, fried gram, foxtail millet, horse gram, bajra, ragi, jowar, maize, barley and wheat. It is high in protein, free from preservatives, contains jaggery, and is suitable for vegetarians. This product aligns with Mintel’s 2019 Global Food & Drink Trend ‘Elevated Convenience’ which explains how convenience food and drink will get an upgrade to match the premium expectations of consumers in the on-demand age.

Three Squirrels’ Mixed Nuts Double Protein Milk Coffee Drink, China
Popular Chinese snack brand Three Squirrels recently launched its first beverage product, and all eyes have been on this functional coffee drink, particularly as it addresses brain health—a hot topic in today’s modern world. This product combines caffeine, medium-chain triglycerides (MCTs), protein and dietary fibre, making it a drink that is not only nutritious and tasty, but also one that benefits gut and brain health. This product is said to be developed with the rising prevalence of mental fatigue in mind. As outlined in Mintel’s 2019 Global Food & Drink Trend ‘Through the Ages’, brain health is a lifelong consideration for many.
Pure’s Probiotic Kale Chips with Garlic and Spices, Australia
Probiotics and fermented foods have been appearing across a wide range of food and drink categories, and not just in dairy or pickled condiments. This flavoured kale chip product is described as being a nutritious farm-fresh local and organic snack, and is unique for how it talks about probiotics: ‘fermented with one billion CFUs of vegan GanedenBC30 probiotics, shielded by a layer of protein, which prevents them from getting neutralised during digestion’. While this technical speak may not be understandable to all consumers, it does send across the message that probiotics will do the required job. This handmade paleo snack is suitable for vegans, is high in iron, and is free from gluten and oil.

Nescafé’s Lively Yuzu Coffee, Indonesia
Coffee culture in Indonesia is going strong, and as the demand for quality coffee and café experiences mainstreams, together with the growth of consumer desire for social media-worthy experiences, brands have the opportunity to connect and engage more with consumers. Today, brands are trying to offer consumers a heightened consumption experience in ready-to-drink (RTD) coffee through different means, including the playing with flavours and textures. To introduce non-coffee drinkers into the coffee category and reach out to younger Indonesians, Nestlé has introduced a new RTD variant under its Nescafé brand which sees the addition of yuzu into coffee. The inclusion of fruity flavours in coffee is an emerging trend to watch globally.

Aroma Truffle & Co.’s Black Summer Truffle Potato Chips with Parmesan Cheese, Singapore
Truffle as a flavour is exploding across Southeast Asia, and today, is also coming through in the packaged snacks marketplace. These truffle-flavoured potato chips from Truffle & Co.’s claim to be the world’s strongest truffle crisps. These premium quality, hand-cooked crunchy chips are naturally sourced and said to use the finest and most natural of ingredients to arouse sophisticated taste buds.

Sesamilk’s Original White Sesame Milk, Thailand
Following a plant-based diet is one of the fastest developing trends globally, and is increasingly emerging in Southeast Asia in recent years. According to Mintel research, 45% of urban Thais are looking to follow a plant-based, vegetarian or vegan diet. This halal-certified product is said to provide 392mg of natural sesamin per 200ml, is free from added preservatives, dairy, soy, gluten and cholesterol, and is low in sodium. It is made from real natural sesame and is suitable for vegans and lactose intolerants. This beverage launch aligns with Mintel’s 2017 Global Food & Drink Trend ‘Power to the Plants’, which highlights how consumer preference for natural, simple and flexible diets will drive further expansion of plant-focused formulations.
Calli’s Earl Grey Tea Ice Cream, Malaysia
This product is said to use real earl grey tea leaves that have been steeped overnight for full flavour. It is high in protein, and low in fat, calories and sugar, and claims to have double the flavour and less than half the calories of other brands. The product provides 330 calories per pint. Consumers across the world are seeking a balanced approach to diet and health, recognising that occasional treats are essential for enjoying life and managing stress. Mintel has predicted that brands have an opportunity to excel by offering consumers ‘permissible indulgence’ that walks the line between health and indulgence. In a category centred on indulgence, this product proves that consumers can have it all—taste, indulgence and health.

Peyoung's Scalp D Seaweed Max Salty Chow Mein, Japan
This instant noodle launch, made in collaboration with shampoo brand Scalp D, claims to reverse hair loss for men specifically. With ingredients such as kombu and seaweed, as well as extracts from salmon and loquat leaf, the new launch contains nutrients that are said to promote hair growth. Hijiki, a brown sea vegetable, is also added to provide a source of dietary fibre and minerals. With new ingredients and formulation, a crossover of claims from beauty and personal care is also making its way into food and drink. According to Mintel GNPD, food products that contain hair loss claims are still quite uncommon across not only in Asia, but globally—causing this product to make headlines when it launched in Japan.

Mecol's Black Rice Sparkling Drink, South Korea
Carbonated soft drinks have a common perception of being unhealthy, and Mecol is reversing this perception by rapping into the 'health halo' that surrounds black rice which is said to be rich in anthocyanin and is a great source of antioxidants. This grain-based sparkling drink is made from 10% roasted black brown rice and contains 70% of the daily adult requirement of vitamin C.
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