

An aerial night view of a city, likely Shanghai, with a dense grid of buildings and streets illuminated. Overlaid on the city are several glowing white arcs that connect various points, creating a network-like structure. The sky is dark blue with scattered white stars or light points. A large dark blue rectangular box is positioned in the upper right quadrant, containing white text.

Traditional Products – Innovation Landscape 4th Range Products

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Methodology

ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Mintel Global New Products Database.
- Geography: Europe.
- Time Frame: 2014 – 2018.
- Category: Fruit & Vegetables
- Category: Meals & Meal Centers
 - Subcategory: Salads

ABBREVIATIONS & NOTES

- CAGR = Compound Annual Growth Rate
- F&B = Food & Beverage
- NPD = New Product Development
- NPL = New Product Launches

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Overview of Trends in 4th Range Products - Europe



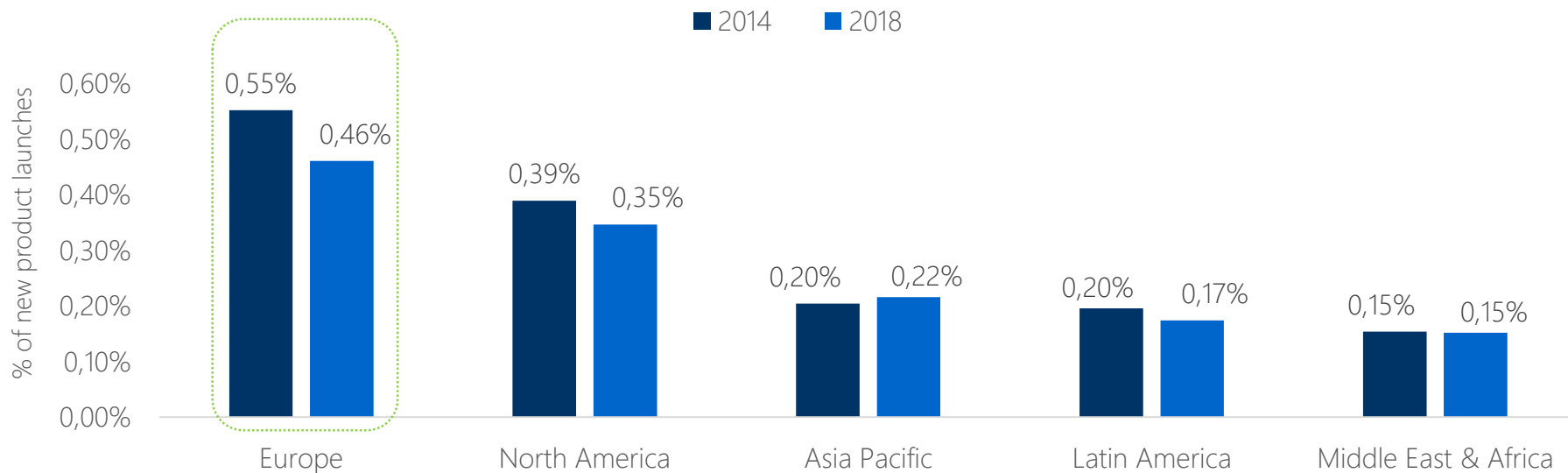
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Europe leads 4th range new product launches

- With 0,46% of new product launches, Europe is the region with the highest activity of 4th range product launches.

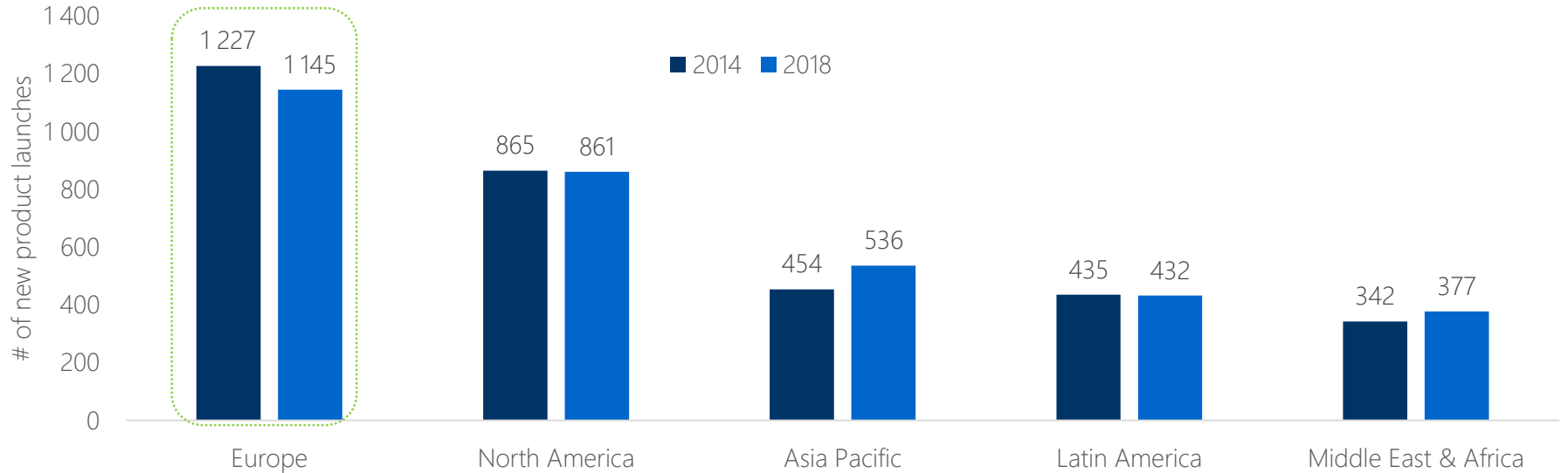
4th range products as percentage (%) of F&B new product launches tracked per region (2018 vs. 2014)



Europe leads 4th range new product launches

- Asia Pacific saw the most growth in number of NPL in the 4th range segment.

Number of 4th range products new product launches tracked per region (2018 vs. 2014)

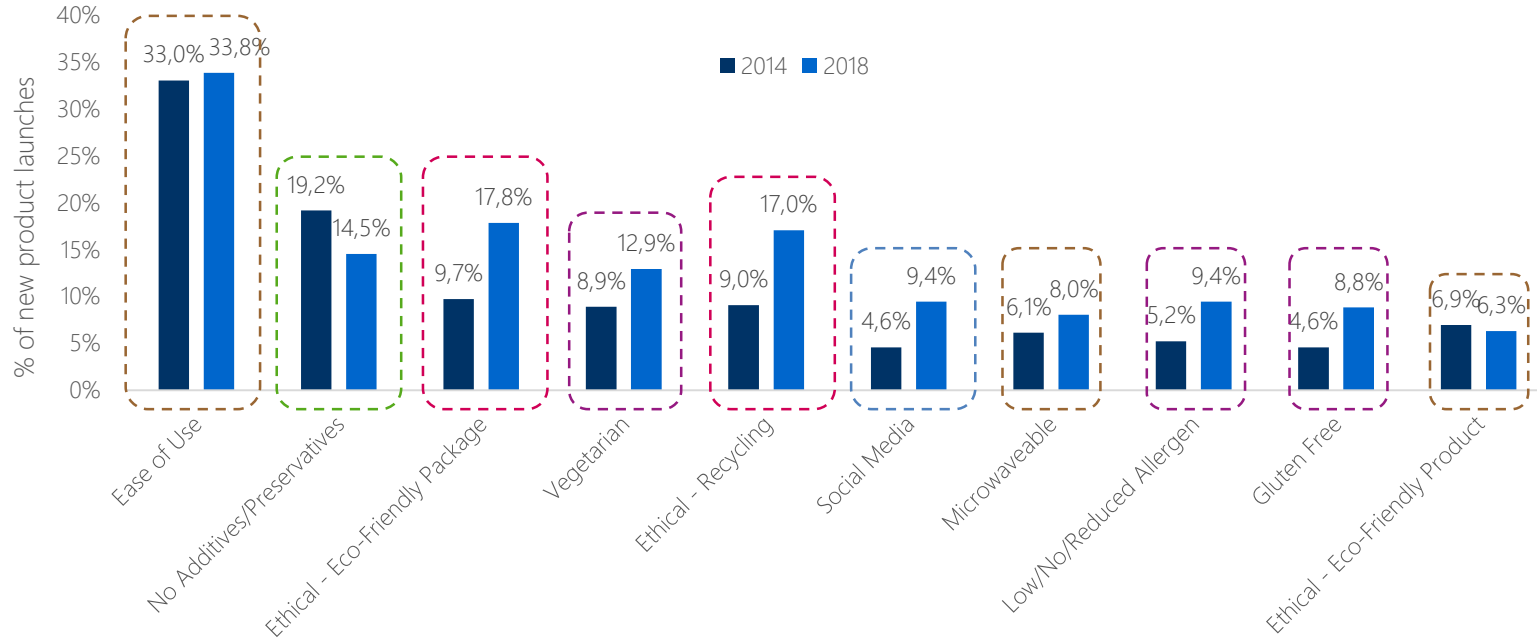


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Convenience, Ethical & environmental and Suitable for lead in 4th range products in Europe

Top positionings as percentage (%) of 4th range product launches tracked (Europe, 2018 vs. 2014)



Convenience

Natural

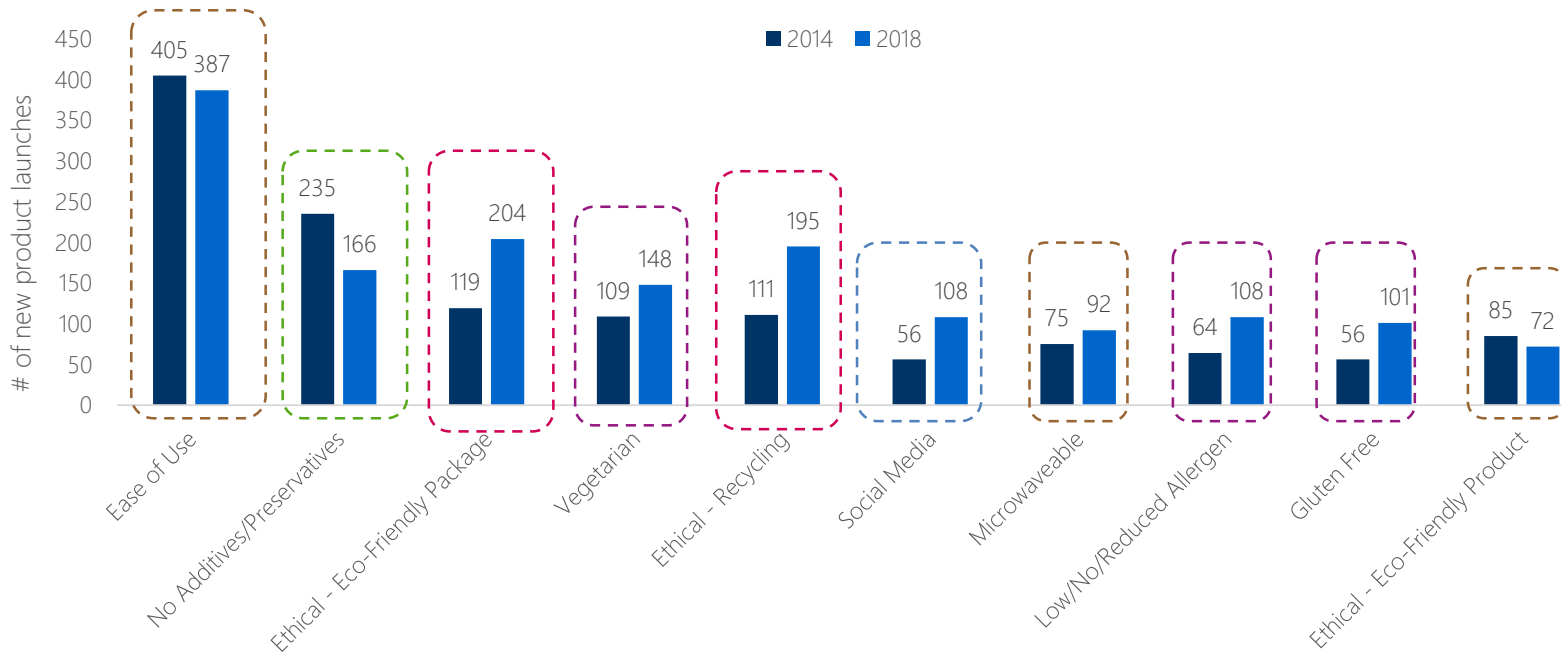
Ethical & environmental

Suitable for

Positioning

Convenience, Ethical & environmental and Suitable for lead in 4th range products in Europe

Number of 4th range new product launches tracked per positioning (Europe, 2018 vs. 2014)



Convenience

Natural

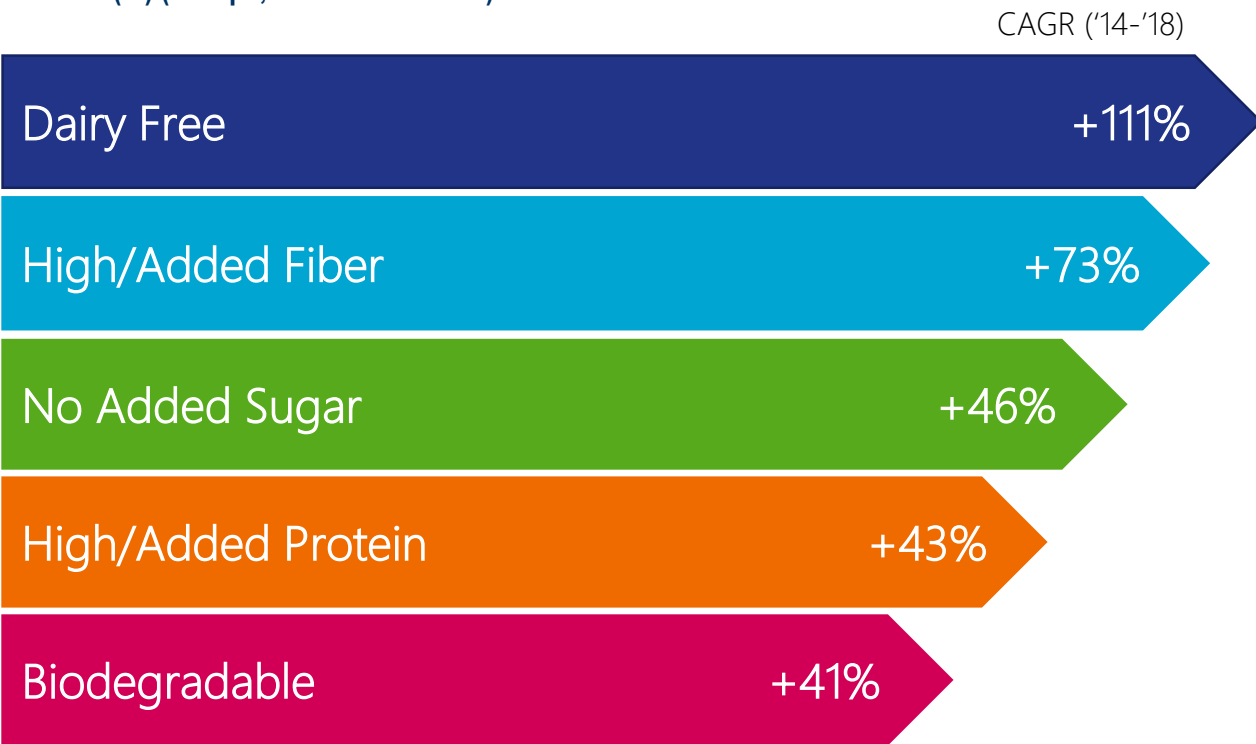
Ethical & environmental

Suitable for

Positioning

Convenience, Ethical & environmental and Suitable claims are in the lead in 4th range products in Europe

Fastest growing claims as an average annual growth rate (%) in new 4th range products launches tracked (%) (Europe, CAGR 2014-2018)



AH Meesterlijke Wokken
Regenboog Wokgroente: Rainbow Wok Vegetables

Netherlands, Nov 2018

CLAIMS **This product is free from gluten and dairy**

An aerial night view of a city, likely London, with a glowing network of white lines and nodes overlaid on the scene. The lines form a complex web, suggesting global connectivity or data analysis. The city lights are visible in the background, and the sky is dark with some clouds and stars.

European Consumer Insights in Vegetables, Fruits and Salads



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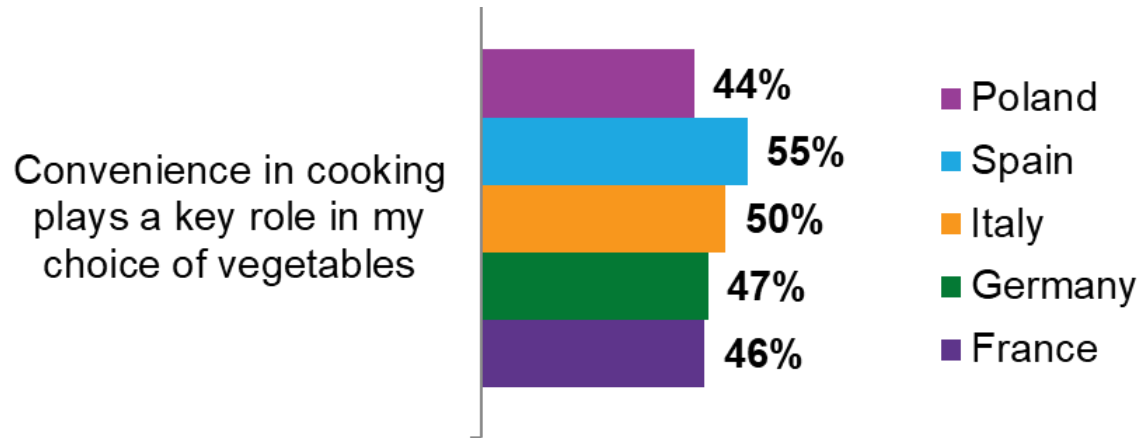
Fruit and vegetable 'hacks' cater to busy lifestyles

Convenience in cooking plays a key role in vegetable choice for many Europeans.

As consumers endeavor to increase their fruit and vegetable intake, they inevitably confront the reality that preparing meals with raw, bulk and unprocessed produce requires a significant time investment that directly conflicts with their ever-shrinking time resources.

This 'pain point' is proving to be fertile ground for fruit and vegetable NPD that offers convenience as well as healthfulness.

Attitudes towards fruit and vegetable (including potatoes), by key European markets, 2015

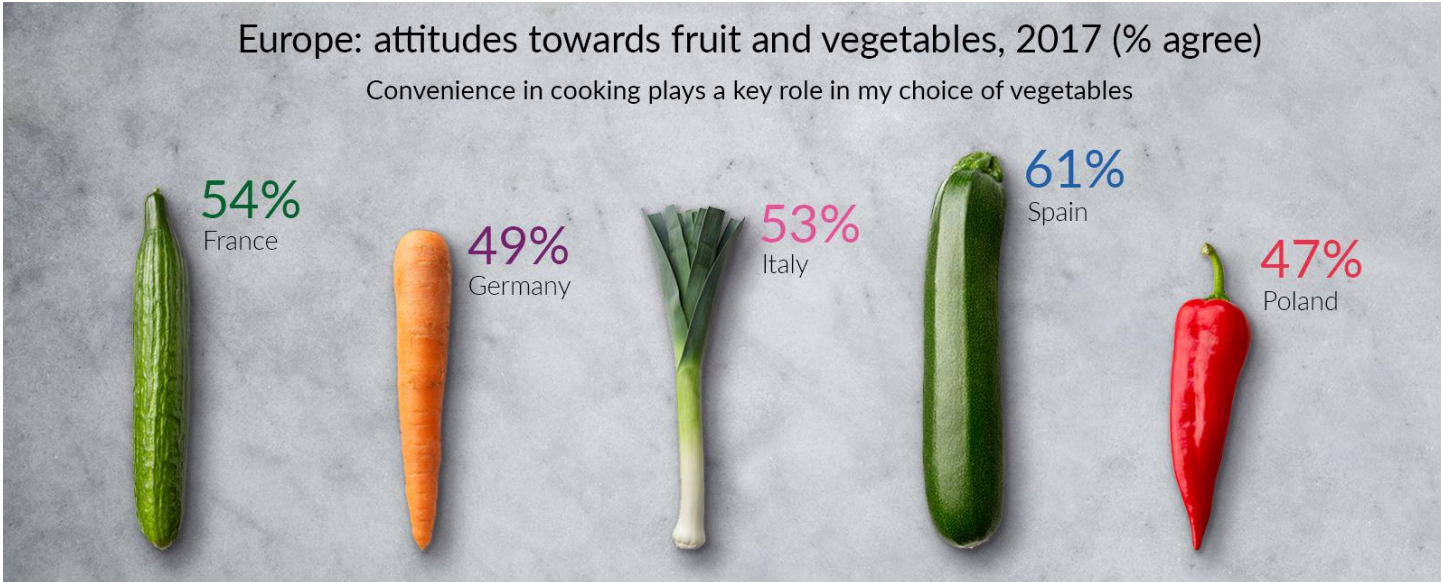


Base: 1,000 internet users aged 16+

Source: Lightspeed GMI/Mintel

European consumers seek time-saving solutions

Consumers are increasingly looking for 'shortcut' products to help cope with the pressures of their busy lives.



Base: 1,000 internet users aged 16+
Source: Lightspeed/Mintel

Pre-cut ready-to-eat vegetables need to widen appeal

Although fresh convenient pre-cut and ready-to-eat vegetables have been growing in popularity in Germany, their usage is still rather low, especially compared to neighbouring Western European markets.

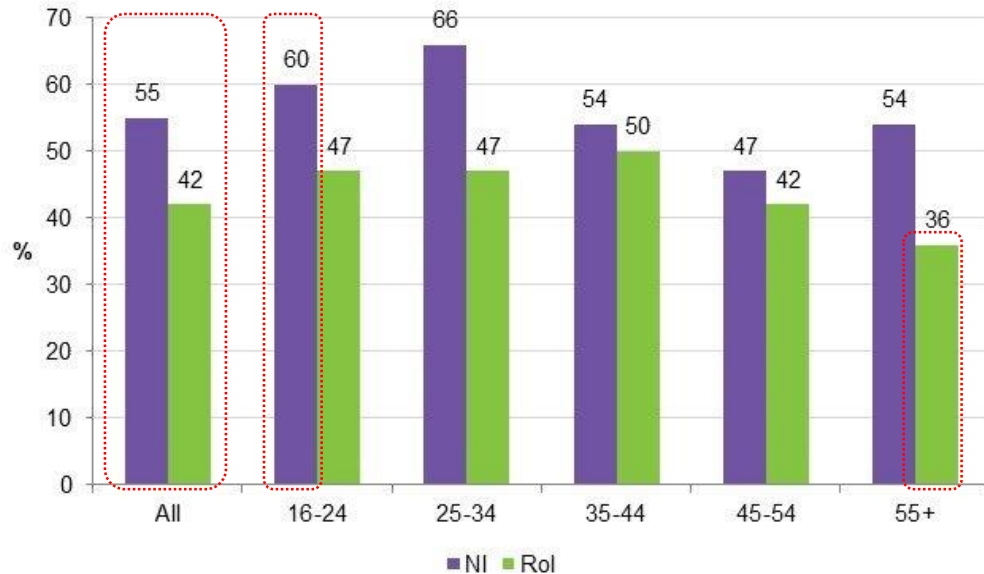
Lower uptake of fresh pre-cut vegetables in Germany in comparison to its neighbours can be partially attributed to consumer concerns with regards to the safety, quality and freshness of chilled convenience products.

Moreover, there are also differences in vegetable consumption patterns in Germany compared to other Western markets. German consumers are less likely to eat vegetables incorporated in soup or other dishes, opting for raw vegetables instead.

Types of vegetables typically purchased in a week, by key Western European markets, 2015

	Bagged/chilled pre-packed salads (excluding dressed salads, pasta salad and coleslaw)	Fresh ready-to-cook vegetables (e.g. sliced carrots, chopped onions, stir-fry, ready to roast, microwaveable in bag)
	%	%
Italy	38	17
Spain	33	17
France	31	12
Germany	20	10

Consumers who have bought chilled fruit in the last three months, by age, Northern Ireland and Republic of Ireland, November 2016



Overall, Irish consumers show a greater preference for buying chilled fruit with over half of NI consumers and 42% of RoI consumers having bought these in the last three months.

In NI, Millennials (aged 16-34) show the strongest preference for buying chilled fruit. Fruit pots are driving purchasing in this category with many now included as part of lunch time meal deals to give consumers healthier options over crisps and chocolate.

In RoI, consumers aged 55+ are the least likely to buy chilled fruit.

Consumers who purchase fresh ready-to-cook vegetables (eg chopped onions) in a typical week, by age, Northern Ireland and Republic of Ireland, November 2015



The convenience and easy-to-use appeal of fresh ready-to-cook vegetables may appeal to younger consumers who are typically more open to 'life hack' products.

Ready-to-cook vegetables (eg chopped onions) speed up the prepping time of meals and the cooking process. In particular, for those who do not enjoy cooking, ready-to-cook vegetables allow consumers a convenient means of cooking.

However, mature consumers may be less inclined to splurge on ready-to-cook vegetables, which likely explains the lower usage. Mature consumers may not see the value that comes with the extra expense of ready-to-eat vegetables. In addition, mature consumers are more likely to have a family to cook for and therefore bulk buying without convenience lowers the cost.

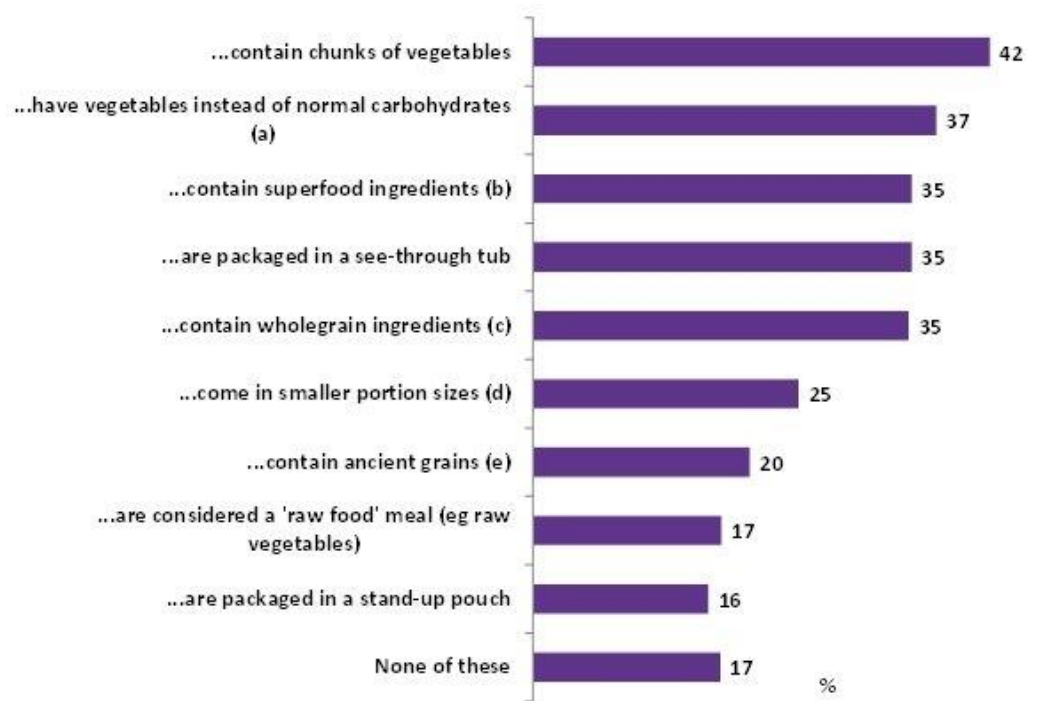
Spiralising' and the use of vegetables as “faux carbs” is a key foodie trend.

This promotes using vegetables as direct substitutes for carbohydrates in meals by disguising them in similar shapes, such as cut into thin noodle shapes or curls, leveraging a “stealth health” approach.

There are opportunities for more manufacturers to venture down this on-trend avenue, given the interest found in the consumer research. These are also well placed to appeal to the 22% of consumers who limit their intake of carbohydrates.

Which, if any, of the following types of ready meal would you be interested in trying?"

Interest in innovation in ready meals, February 2016



- (a) eg courgette noodles, cauliflower rice
- (b) eg salmon, kale, sweet potato
- (c) eg brown rice, whole-wheat pasta
- (d) eg a mini pot for lunch
- (e) eg quinoa, amaranth, buckwheat, spelt

Base: 1,181 internet users aged 16+ who have eaten ready meals in the last 3 months
Source: Lightspeed GMI/Mintel

An aerial night view of a city, likely London, with a network of glowing white lines and nodes overlaid on the scene. The lines form a complex web across the city, with nodes at various points. The background shows city lights and a river.

Overview of Trends in Traditional 4th Range Products - Europe



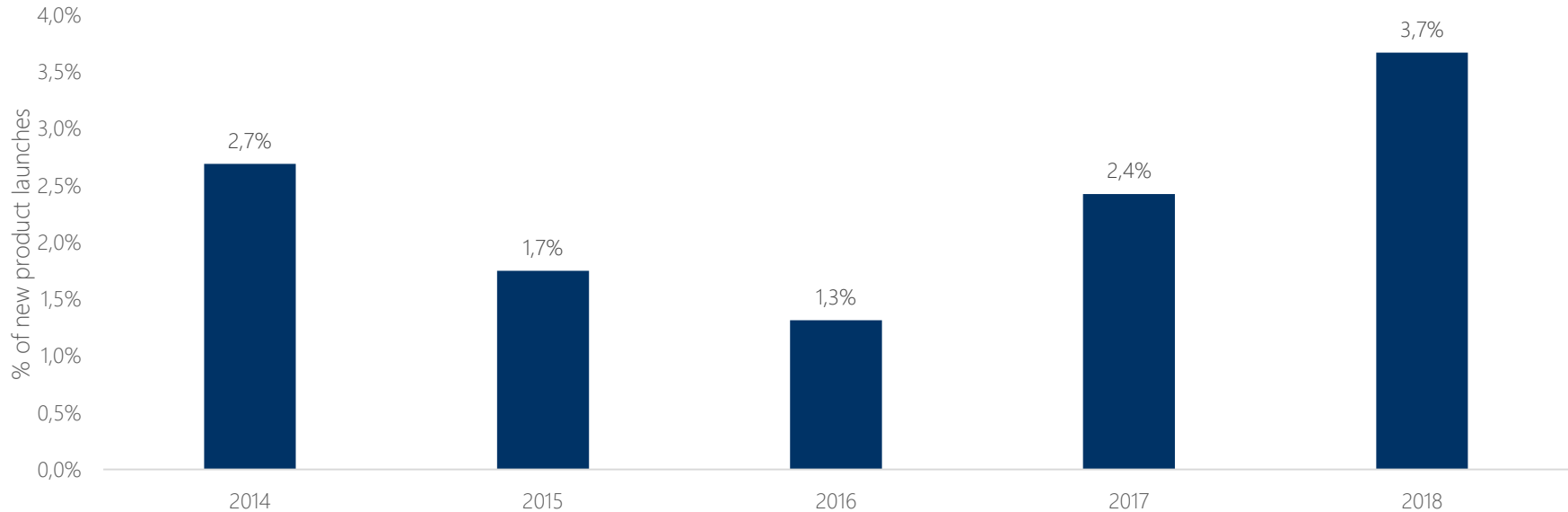
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2018 is the year with highest NPD of traditional 4th range products.

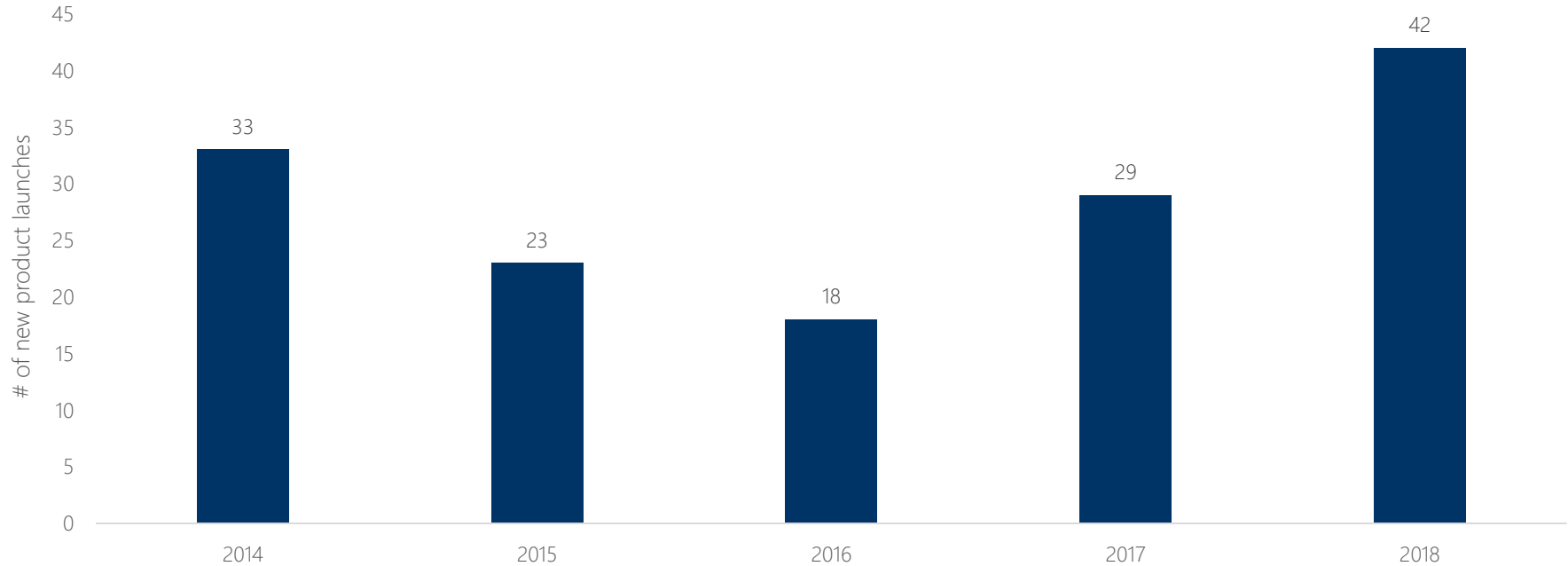
- The traditional positioning presence in 4th range products has been steadily increasing since 2016.

Share of traditional positioning as percentage (%) of new 4th range product launches tracked (Europe, 2014-2018)



2018 is the year with highest NPD of traditional 4th range products.

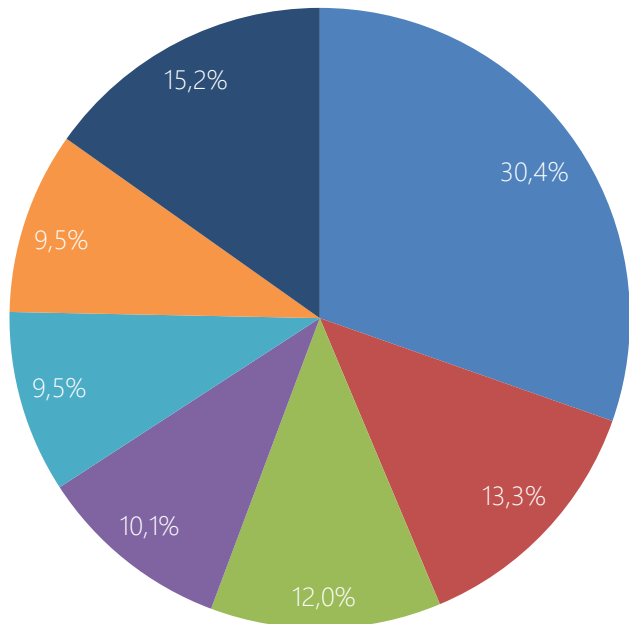
Number of new 4th range products with traditional positioning launches tracked (Europe, 2014-2018)



France leads launches with traditional positioning in 4th range products

Top countries as percentage (%) of new 4th range products launches tracked with traditional positioning (Europe, 2014-2018)

- France
- Germany
- Spain
- Italy
- Norway
- UK
- Rest of Europe



Alpha Taste Griechischer Traditioneller Auberginensalat: Traditional Greek Style Aubergine Salad

Germany, May 2018

DESCRIPTION **A traditional salad** with grilled red bell peppers. This product retails in a 200g pack.



Monoprix' La Salade Salade Saumon Fumé, Pommes de Terre et Aneth: Smoked Salmon, Potato and Dill Salad

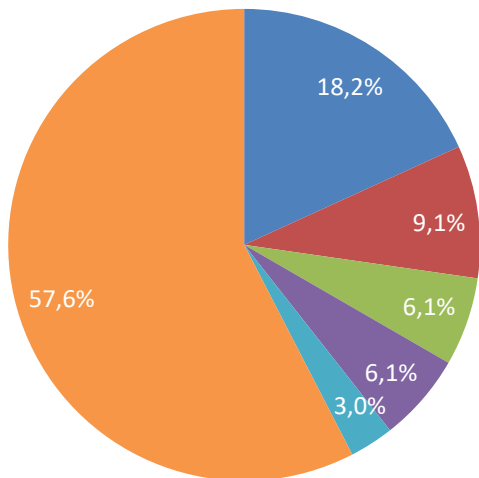
France, Aug 2018

DESCRIPTION The **hand made** product retails in a 290g pack.

European market for 4th range products with traditional positioning is highly fragmented

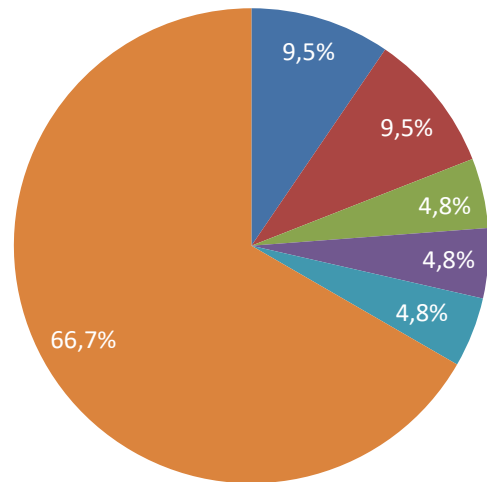
Top companies as percentage (%) of new 4th range products launches tracked with traditional positioning (Europe, 2014)

■ Bonduelle ■ Martinet ■ Lidl
■ Nadler Feinkost ■ Auchan ■ Other Companies



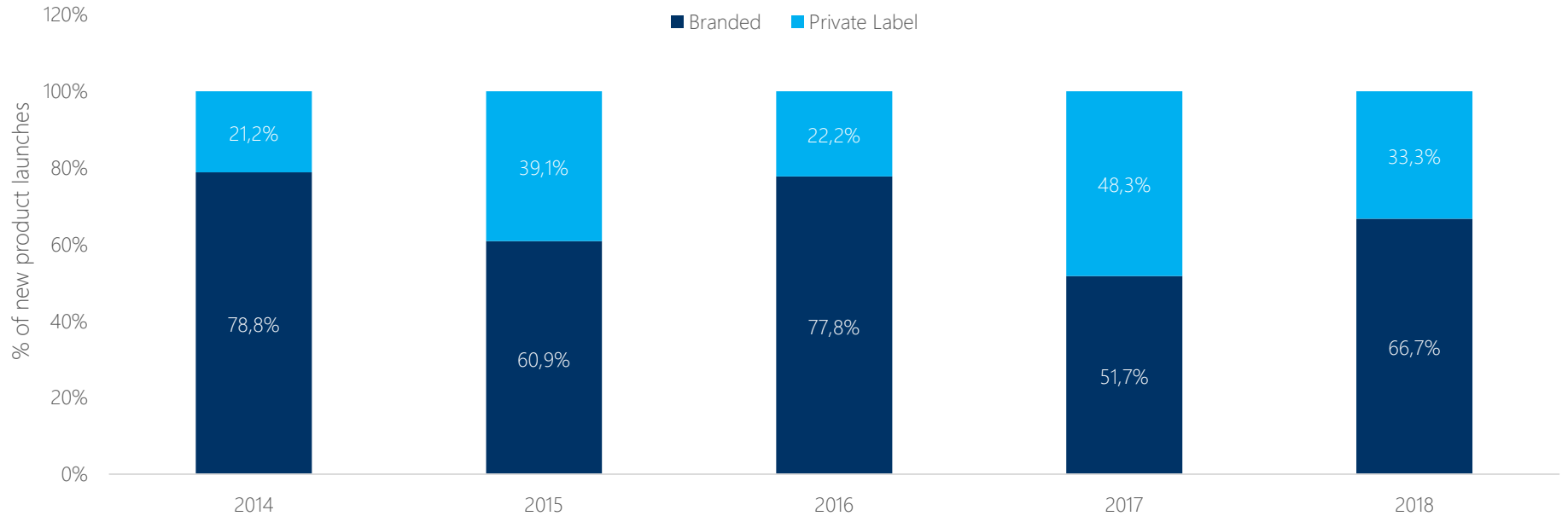
Top companies as percentage (%) of new 4th range products launches tracked with traditional positioning (Europe, 2018)

■ Cora ■ Corbeille Tradition
■ Florette France GMS ■ Art Nor
■ PUR Bio Feinkost Manufaktur - Heinz Gierze ■ Other Companies



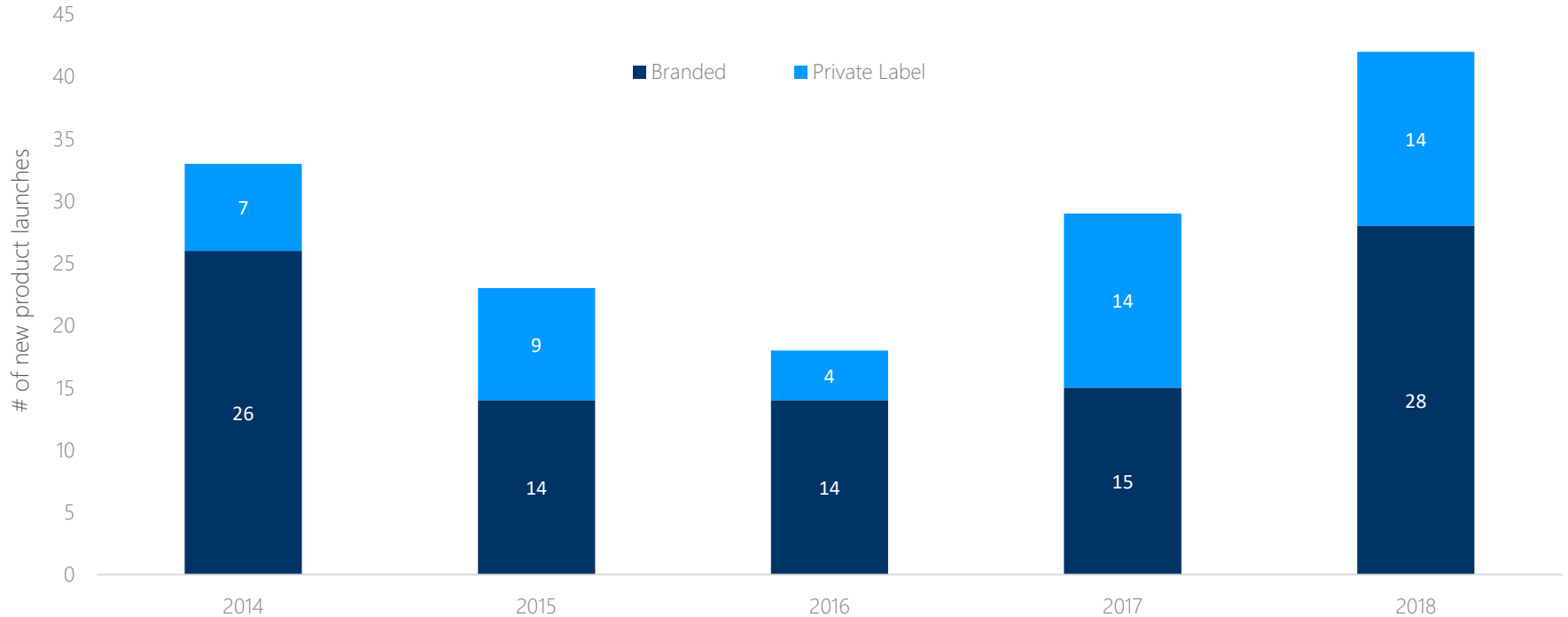
More branded products with traditional positioning

Share of branded and private label as percentage (%) of new 4th range product launches tracked with traditional positioning (Europe, 2014-2018)



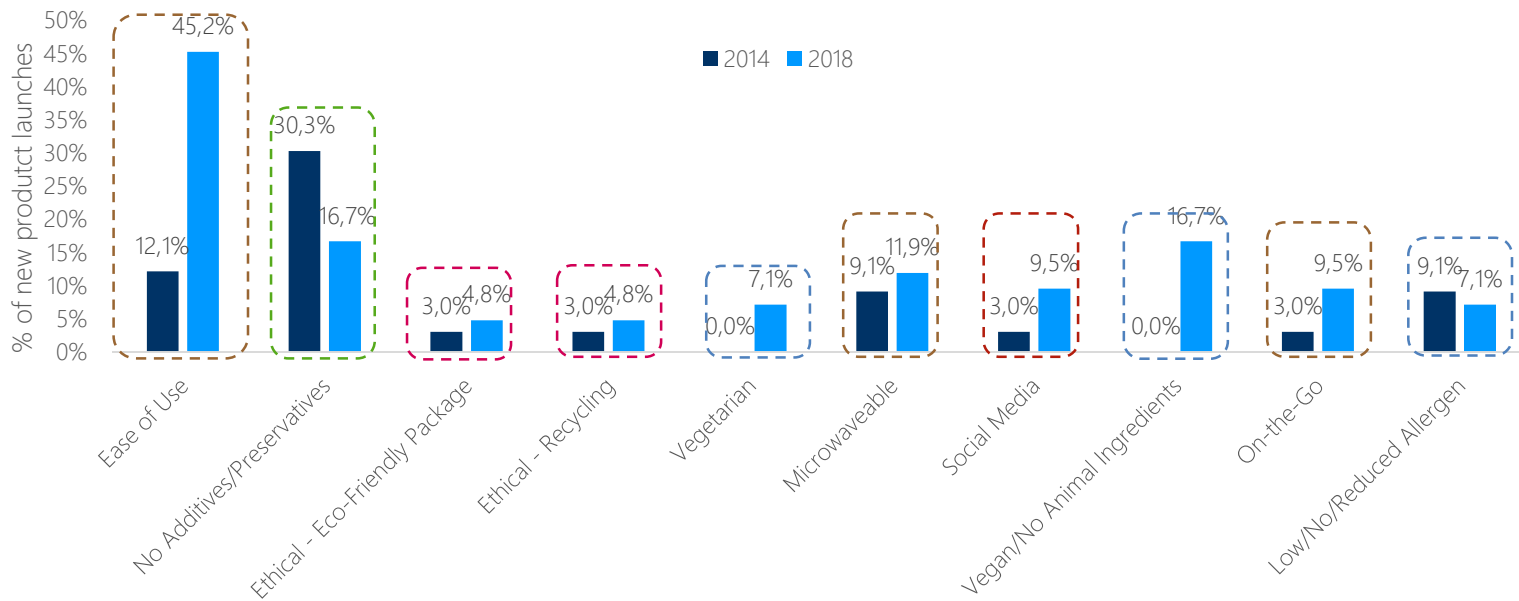
More branded products with traditional positioning

Number of new 4th range products with traditional positioning branded and private label (Europe, 2014-2018)



Convenience, Ethical & environmental and Suitable are the top positionings of traditional 4th range products in Europe

Top positionings as percentage (%) of 4th range new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



Convenience

Natural

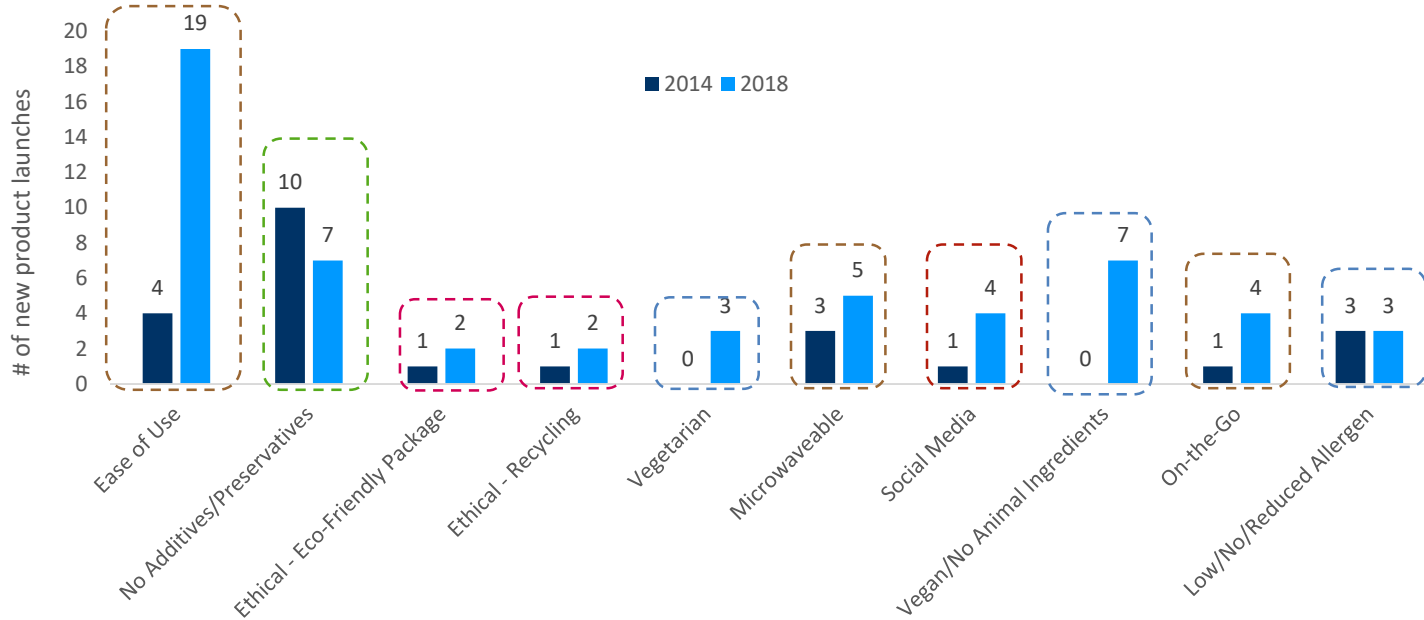
Ethical & environmental

Suitable for

Positioning

Convenience, Ethical & environmental and Suitable are the top positionings of traditional 4th range products in Europe

Top positionings as number of 4th range new product launches tracked with traditional positioning (Europe, 2018 vs. 2014)



Convenience

Natural

Ethical & environmental

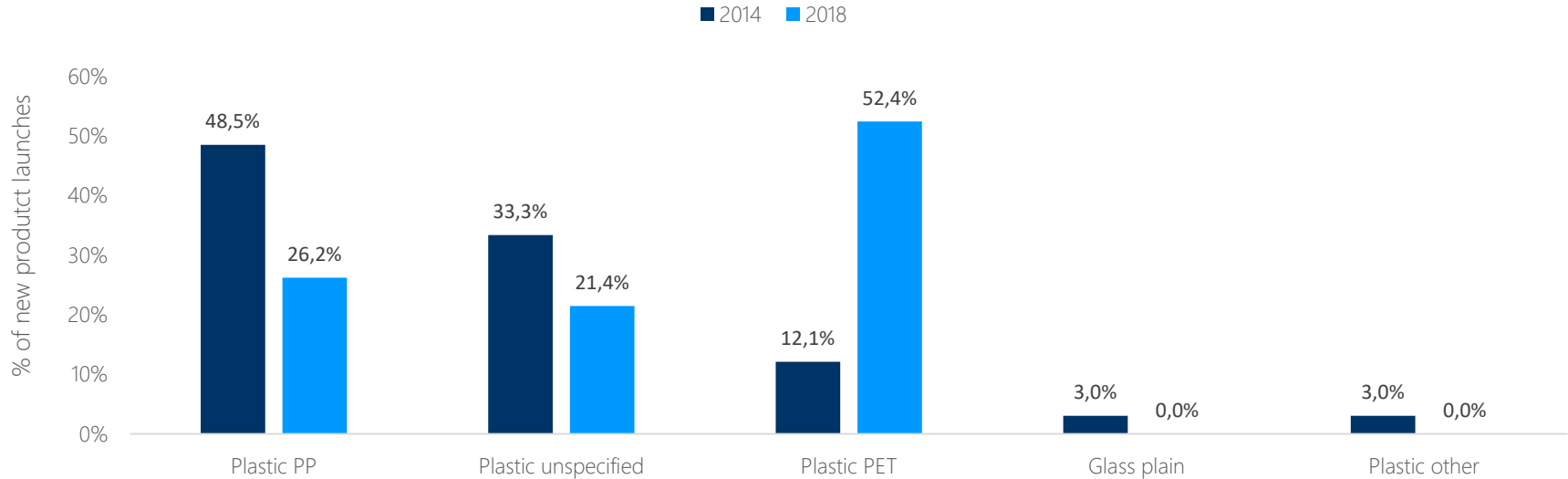
Suitable for

Positioning

Plastic dominates the packaging of 4th range traditional products

- There was a drastic growth of the Plastic PET from 2014 to 2018.

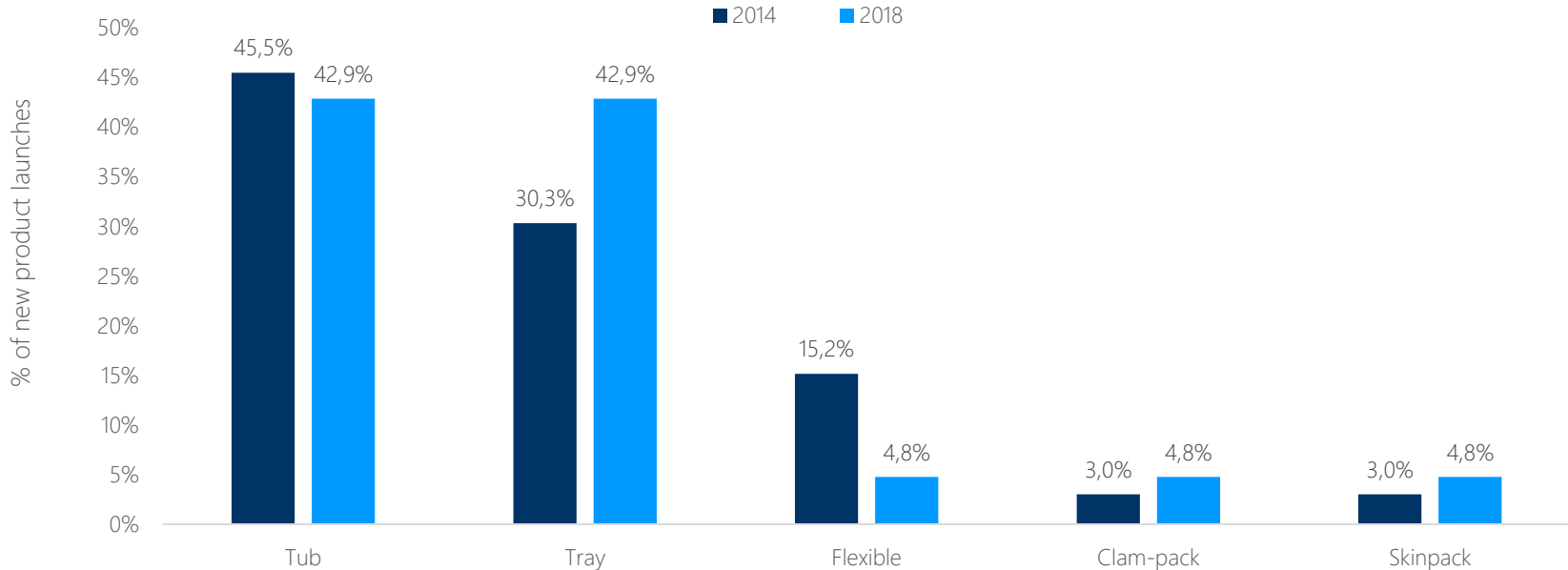
Packaging material as percentage (%) of 4th range new product launches tracked with traditional positioning (Europe 2014 vs. 2018)



Tub and Tray in the top for the year of 2018

- Both the Tub and the Tray were used in 42,9% of product launches in 2018, with the latter growing at an interesting rate.

Packaging type as percentage (%) of 4th range new product launches tracked with traditional positioning (Europe 2014 vs. 2018)



An aerial night view of a city, likely London, with a glowing network of white lines overlaid on the scene. The lines form a series of overlapping arcs and intersect at various points, creating a sense of connectivity and innovation. The city lights are visible in the background, and the sky is a deep blue with some clouds.

Innovation Opportunities in Traditional 4th Range Products - Europe



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Spotlight on claims: Ease of Use, No Additives and Vegan

EASE OF USE



Bolettus World Mediterráneo Combo de Champiñón Crimini y Shimeji con Calabacín, Zanahoria y Salsa de Aceite de Oliva y Vinagre: Mediterranean Mix of Common and Shimeji Mushrooms with Zucchini, Carrot and Olive Oil and Vinegar Sauce

Spain, Oct 2018

DESCRIPTION This ready-to-cook product can be **sautéed in 10 minutes**, enjoyed as a side with grilled fish and wholegrain rice, and retails in a 300g pack including a traditional sauce and featuring the Facebook, Instagram, and YouTube logos, and a recipe idea.

NO ADDITIVES/PRESERVATIVES



X-Cellent Conoitorni Bieta con Pomodorino (Chard with Cherry Tomato)

Italy, Dec 2018

DESCRIPTION This handmade side dish contains pre-washed, pre-cut vegetables which have been selected by hand, and can be cooked for two minutes in the microwave or for three minutes in a pan. **It is free from additives, preservatives and colourings**, and retails in a 250g pack..

VEGAN/ NO ANIMAL INGREDIENTS



Pur Quinoasalat mit Belugalinsen und Minze (Quinoa Salad with Beluga Lentils and Mint)

Germany, Apr 2019

DESCRIPTION **This vegan** product is said to be from organic farming and prepared by hand. It retails in a 200g pack bearing the BIO and EU Green Leaf logos

Country-style salads provide new flavour experiences

GREECE



Luba Lunch Grecki: Greek Lunch

Poland, Jun 2019

DESCRIPTION This product is described as made with traditional ingredients, featuring 100% flavour, and retails in a 300g pack.

MEXICO



Waitrose Mexican Style Black Bean, Pepper & Sweetcorn Salsa Bowl

UK, Jun 2019

DESCRIPTION This product contains salad leaves topped with a rice and bean salad, baby plum tomatoes, sweetcorn salsa, Monterey Jack cheese, yellow peppers and a creamy avocado dip. This product is suitable for vegetarians and retails in a partly recyclable 255g pack providing one of five a day.

ITALIA



Chef Select Italiaanse Kip Maaltijdsalade: Italian Chicken Salad

Netherlands, Jun 2019

DESCRIPTION This product is a salad with pesto, grilled chicken, cheese, olives and pesto dressing. The product retails in a 450g pack featuring Beter Leven Dierenbescherming (Better Life Animal Protection) one star and Plastic Heroes logos.

Focus on ancient grains: Bulgur



Bio-Verde Taboulé Salat mit Tomate und Minze: Tabbouleh Salad with Tomato and Mint

Germany, Apr 2019

DESCRIPTION Now available in a newly designed pack, this organic product is suitable for vegans and ideal to consume as a starter, side dish or a snack. It retails in a 125g pack featuring the EU Green Leaf logo and QR code.



Carrefour Veggie Salade Boulgour, Quinoa, Graines de Courge (Bulgur, Quinoa and Pumpkin Seeds Salad)

France, Jan 2019

DESCRIPTION comprises cooked quinoa and bulgur, carrots and pumpkin seeds. This vegan product is a source of proteins and retails in a 300g pack bearing the V-Label from the European Vegetarian Union.



Sklizeno Bulgur s Uzeným Tofu a Paprikou: Bulgur with Smoked Tofu and Paprika

Czech Republic, Sep 2018

DESCRIPTION is now available. The product retails in a 270g pack.

Focus on ancient grains: Quinoa



Dunnes Stores Chickpea, Quinoa & Kale Salad in a Lemon and Mint Dressing

Ireland, Jun 2019

DESCRIPTION This product comprises chickpeas, mung and edamame beans, with red quinoa and black rice in a lemon and mint dressing with kale and cranberries. It is suitable for vegetarians and retails in a 235g pack.



AH Maaltijdsalade Quinoa Noten: Quinoa and Nut Salad

Netherlands, May 2019

DESCRIPTION This product features acidified quinoa, spinach, radish, soy beans, nuts mix, and a soya-ginger-sesame dressing. The vegan product is free from dairy, and retails in a 400g pack containing 230g vegetables, 1 x 50g sachet of soya-ginger-sesame dressing and 1 x 40g sachet of mixed nuts.



Chef Select Ensalada de Quinoa, Remolacha, Alubias y Pipas: Quinoa, Beetroot, Bean, and Sunflower Seed Salad

Spain, Apr 2019

DESCRIPTION This gluten-free and vegan product retails in a 230g pack featuring the V-Label seal from the European Vegetarian Union.

Legume vegetables as ingredients



Brindélices Bio Tofu Bowl: Organic Tofu Bowl

France, Feb 2019

DESCRIPTION This product comprises a salad of raw vegetables, pasta and organic tofu. It retails in a 260g pack containing one fork and featuring the AB and EU Green Leaf logos



Kühlmann Bulgursalat mit Kichererbsen und Kidneybohnen: Bulgur Salad with Chickpeas & Kidney Beans

Austria, Mar 2019

DESCRIPTION This product is made with fresh parsley and is suitable for vegans. It retails in a 250g pack with enclosed fork, and featuring the V-Label seal from the European Vegetarian Union.



Selection Monique Ranou Céréales à l'Orientale Petits Légumes & Lentilles Corail: Oriental Cereals Salad with Small Vegetables and Red Lentils

France, Dec 2018

DESCRIPTION This product scores an A on the Nutri-Score rating, and retails in a 300g pack with the Producteurs et Commerçants (Producers & Traders) logo.



Offerdinger Couscoussalat mit Kichererbsen, Paprika und Kräutern: Couscous Salad with Chickpeas, Bell Pepper and Herbs

Germany, Feb 2019

DESCRIPTION This vegan product retails in a 200g pack bearing the V-Label seal from the European Vegetarian Union.

Rice and Spaghetti alternatives



AH 100% Groente Broccoli als Alternatief voor Rijst: Broccoli Rice Alternative

Netherlands, Jun 2019

DESCRIPTION This product is suitable for an Asian wok with shiitake, garlic and spring onion in oyster sauce, or as a rice alternative. The 100% vegetable product is suitable for vegans and is free from gluten and milk, and retails in a 400g pack that provides two servings and features the Plastic Heroes logo.



AH Witte Kool en Paarse Peen: White Cabbage and Purple Carrot Mix

Netherlands, Jun 2019

DESCRIPTION Described as a alternative for wild rice, this 100% vegetable product is suitable for vegans, free from gluten and milk, and retails in a 400g pack bearing the Plastic Heroes logo.



Wonnemeyer Feinkost Karotten-Spaghetti: Carrot Spaghetti

Germany, Feb 2019

DESCRIPTION This product can be fried in five minutes, and are said to be delicious with cherry tomatoes and basil. The ready to cook product retails in a 200g pack.

Tropical/exotic mix fruits



L' Atelier Fraicheur Duo Ananas Noix de Coco: Pineapple and Coconut Duo

France, Apr 2019

DESCRIPTION This product retails in a 0.376kg pack and features pineapple and coconut.



Morrisons Market St Tropical Fruit Platter

UK, Mar 2019

DESCRIPTION This product comprises melon, pineapple, kiwi, mango, and coconut. The vegan product provides one of the five a day portions of fruits and vegetables, and retails in a partially recyclable 230g pack.



Albert Fresh Bistro Krájená Smes Ovoce Upravené Chlazené Cerstvé Ovoce: Fresh Exotic Fruits Mix

Czech Republic, Oct 2018

DESCRIPTION This product comprises cut chilled fresh fruits, and is said to be an ideal snack with a gourmet quality. It retails in a 150g pack bearing the Vím Co Jím logo.



Coop Naturaplan Betty Bossi Fruchtmischung: Exotic Mix

Switzerland, Sep 2018

DESCRIPTION This product contains pineapple, orange and kiwi. The organic product retails in a 150g pack, containing a fork and bearing the Bio logo.

An aerial night view of a city, likely Shanghai, with a network of glowing white lines and nodes overlaid on the scene. The lines form a complex web connecting various points across the city, with some nodes appearing as bright white dots. The city lights are visible in the background, and the sky is a deep blue with some clouds.

Key learnings & What's next ?



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Key learnings & What's next ?

Convenience

Consumers' increasingly busy lifestyles are encouraging the rise of more convenient formats: ready-to-eat fruit/vegetables, ready-to-cook vegetables - who are already washed and cut - and nutritionally complete meals (such as salads). This is in line with Mintel's "Life Hacking" trend, which notes that consumers search shortcuts that help them make their lives simpler.

Environmental concerns

One of the ways companies can highlight their environmental responsibility is through the claims "Ethical – Environmentally-Friendly Package" and "Ethical - Recycling". However, with the problem of plastic packaging becoming increasingly worrying, it will be important to investigate alternatives to it.

Ancient grains in salads

Ancient grains, in addition to providing health benefits, are also a way to add new flavours and textures, as well as an alternative to the more common carbohydrates (rice and pasta). Thus, incorporating it into ready-to-eat salads can be an opportunity.

The rising of veganism/vegetarianism

Either for health or environmental reasons, more and more people are reducing the consumption of animal products, causing the increase of claims related to veganism/vegetarianism and the use of plant protein. In the salads segment, manufacturers are capitalising on legume vegetables to elevate their products to the new consumer standards on protein.



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