

The Insight Programme

World Class Insight for Welsh Food & Drink Business
Directory of Reports



Directory of Reports from the Insight Conference 2024

A Review of the Economy and Outlook for 2024

An economic overview from Food & Drink Wales Insight Programme, looking at the good news and the uncertain news, whilst analysing the implications for food and drink businesses.

Food & Drink Wales Workplace Engagement Survey - WorkL

A detailed presentation of the Food & Drink Wales Workplace Engagement Survey conducted in 2023, by WorkL to measure and improve employee engagement.

Kantar Consulting - Shopper of the Future

This presentation explores the 7 key trends that will impact consumers and businesses in the Welsh Food & Drink landscape over the next 5 years. Kantar has delved into the implications of each trend and outlined actionable strategies for businesses to navigate these changes effectively.

thefoodpeople - Top 5 Food & Drink Trends 2024/25 to Inspire NPD

thefoodpeople discuss the top 10 food and beverage trends for 2024/25 and emphasise the importance of adaptability and agility in an unstable world.

IGD - How Important is Health for Shoppers & Consumers and How to Succeed in Healthier NPD

A presentation from the IGD about the importance of health and strategies for success with NPD (New Product Development).

Kantar Worldpanel - The Latest In Retail & Shopper Behaviour

An overview of five trends in grocery retail, including falling inflation, changing channel growth, signs of recovery for brands, increasing promotions, and retailers focusing on securing loyalty.

IGD - How the Retail Environment is Evolving

Insights into the current and future trends in the UK economy, grocery market, eating out industry, and the European grocery

industry. The importance of sustainability, technology, and health are highlighted in these sectors. Additionally, the impact of legislation and policies on the food and packaging industry is discussed.

FOUR - Renewed Shopper Types for Current Times

An update on the Key shopper groups and their characteristics, with a focus on food lovers. By analysing interests, brand preferences, shopping behaviour, social media presence, and influencers, businesses can develop effective strategies to engage with target audiences.

Kantar Worldpanel - How Consumer Eating Habits Have Evolved

An analysis of the changing trends in the out-of-home dining market, including the impact of inflation, consumer behaviour, and the performance of different channels.

CGA - Review of the On-Trade in 2024

Insights into the changing dynamics and trends in the on-trade market. The document highlights the impact of Covid on the on-trade market, changes in consumer behaviour, and the importance of experience and value for money in the sector.

2023 Short Reports

CGA On-trade update: Drinks on the Rise

An update from CGA on the Out of Home Drinks market in Wales and GB. This presentation explores emerging on-trade macro trends and changes in consumer behaviour.

IGD - Retailer Snapshots 1

An update from IGD on Tesco, Sainsbury's and Asda. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

IGD - Retailer Snapshots 2

An update from IGD on Lidl, Aldi and Co-op. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

IGD - Retailer Snapshots 3

An update from IGD on M&S, Ocado and Morrisons. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

Economic Outlook & Shopper Behaviour Impact - October

An economic overview from the Insight Programme, focusing on market trends in the food and drink sector. This presentation provides a summary on the impact of inflation and the cost of living on the wider food and drink supply chain for Wales and GB, while considering shopper behaviour in response.

Value of Welshness 6 - Eating and Drinking Out of Home Report

Latest in-depth research to assess consumer and business attitudes to Welsh food and drink – including Out of Home 2023.

Value of Welshness 6 - Eating and Drinking Out of Home Presentation

Presentation from the latest instalment of the Insight Programme's Value of Welshness research. This presentation reveals key insights into guest and venue perceptions and attitudes towards Welsh food and drink OOH, highlighting that guests would like to see more Welsh food and drink OOH and how important Welsh Food and Drink is in driving guest venue choice.

Value of Welshness - USA & Japan

This presentation gives insight into the awareness of Welshness in the USA and Japan, including shoppers' perceptions and desire for Welshness. While also providing insight into consumer behaviours in the USA and Japan.

Shopper Segmentation

This cutting-edge shopper segmentation based on attitude will help businesses gain a deeper understanding of their target customers, how to refine their communication plans and optimise their trade discussions. This presentation provides an insight into the key shopper groups and their motivations, focusing on the Food Lovers segment.

CGA – Cost of Living Consumer Pulse

The report is about the CGA Cost of Living Consumer Pulse survey conducted in December 2023 in the UK and Ireland, which examines the impact of the cost-of-living crisis on consumers' spending habits and frequency of visits to on-premise establishments.

Kantar Grocery Retail Performance

An overview from Kantar of the total grocery market in GB and Wales and across key subsectors in 2023.

2023 Reports

Economic Outlook & Shopper Behaviour Impact

An economic overview from the Insight Programme, focusing on market trends in the food and drink sector. This presentation provides a summary on Welsh exports and the wider food and drink supply chain for Wales and GB, while considering shopper behaviour in the retail market and OOH.

Note: The following presentations were given as part of the Welsh Government's Insight Conference 2023. Recordings of these presentations are available on Food & Drink Wales Members Area.

CGA – Drinks State of the Nation: Understanding the Changing Hospitality Environment

An update from CGA on the Out of Home Drinks market in Wales and GB. This presentation considers remaining market pressures alongside potential opportunities.

Kantar – Out of Home State of the Nation: What You Need to Think About to Thrive

An update from Kantar on the Out of Home market. This presentation focuses on the shift in occasions and consumer sentiment and considers the impact of working from home and the cost-of-living crisis.

Value of Welshness: Retail Highlights

Highlights of the Value of Welshness Retail 2022 research, from the Insight Programme.

IGD – How to Thrive in the Changing Retail Environment

This presentation from IGD explores the changing UK grocery environment – including

the new value equation, the impact of HFSS regulations instore, and overall outlook.

Kantar – Retail State of the Nation: What You Need to Think About to Thrive

An overview of the GB and Wales retail market performance from Kantar, including the implications of high inflation on shopper behaviours alongside other key factors.

Kantar – State of the Nation Major Update: How Consumption is Changing in the Home

An update from Kantar on the changing consumption habits in the home. This presentation explores consumers' shifting priorities, and considers the impact of COVID, working from home, and the inflation.

thefoodpeople – Top Ten Food & Drink Trends 2023/24

A dive into the key future food and drink trends for 2023-2024, from thefoodpeople.

IGD – Understanding Europe's Top Retailers and What They Require

An overview from IGD of Europe's leading retailers and five trends shaping the European grocery industry. This presentation also highlights key priorities and current strategy for top retailers in Europe.

An Economic Overview and its Relevance to Food & Drink SMEs

An overview of the current economic outlook from the Insight Programme, focusing on the implications for food and drink businesses. This economic overview also considers potential opportunities alongside ongoing challenges.

2022 Reports

INSIGHT PROGRAMME REPORTS

Value of Welshness – Retail

The latest instalment of the Insight Programme's Value of Welshness research. This presentation includes new insight into shoppers' desire for Welshness and their perceptions of which retailers are doing Welsh well.

The Future of UK Diets

A seminal piece of research, exploring the future of UK diets. This report explores

important drivers of change in diet and their predicted impact on the Welsh Food and Drink Industry. Key trends and the impact of consumer behavioural changes are also analysed.

OTHER REPORTS

IGD – UK Retailers' Sustainability Strategies

This IGD presentation presents the top 10 UK retailers' sustainability strategies, providing insight into their latest initiatives.

thefoodpeople – Top No & Low Alcohol Trends

This presentation from thefoodpeople explores the top current trends in no and low alcohol, including examples of innovation in the market.

CGA – No & Low Alcohol in the On-Trade

This report from CGA explores market contexts and changing consumer habits alongside an overview and market size of low and no alcohol in the UK on-trade.

IGD – Retailer Snapshots 3

An update from IGD on Lidl, Aldi and Iceland. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

IGD – Retailer Snapshots 2

An update from IGD on Asda, Morrisons, Co-op and Ocado. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

IGD – Retailer Snapshots 1

An update from IGD on Tesco, Sainsbury's and M&S. This snapshot presentation outlines retailer strategic priorities, including key considerations for suppliers dealing with each retailer.

KANTAR REPORTS

5 Observations on Consumer Behaviour

Presentation from Kantar, given at TUCK IN 2022, which focuses on consumer behaviours and provides key insight into how producers could use these to grow their brands in retail.

Our Nation Out of Home

Presentation from Kantar which gives an overview of the Out of Home market performance in 2021 and considers ways in which value, and the consumers' perceptions of it, have shifted in a changed market.

Grocery Retail Performance

An overview from Kantar of the total market in GB and Wales and across key categories in 2021.

OTHER REPORTS:

Out of Home Update: May 2022

An update on the Out of Home market from the Insight Programme, presented to the Drinks Cluster. This presentation includes the impact of shopper behaviour on trips, frequency and spend, as well as 2022 economic forecasts and economic recovery outlook by sector.

CGA – Drinks State of the Nation

Presentation from CGA to the Drinks Cluster on the current Drinks State of the Nation. This presentation focuses on the emerging on trade and changes in consumer behaviour, including implications of the rising cost of living and COVID on drinks performance.

Note: The following presentations were given as part of the Welsh Government's Insight Conference 2022. Recordings of these presentations are available on the Food & Drink Wales Members Area.

An Economic Overview and its Relevance to Food & Drink SMEs

An overview of the current economic outlook from the Insight Programme, focusing on its importance and relevance to food and drink SMEs. This economic overview considers rising inflation, fuel costs and the crisis in Ukraine.

Euromonitor – Emerging Market Opportunities

Presentation from Euromonitor on export opportunities which includes an economic overview and insight into food and drink trends in four emerging markets: South Africa, Philippines, Romania, and Vietnam.

Kantar – Retail State of the Nation: What You Need to Think About in 2022

Presentation from Kantar with an overview of the retail market performance and implications of high inflation on shopper behaviours. Also includes key insight to help shape strategy in response to the latest shopper reaction.

IGD – Online Shopping Key Drivers/Quick Commerce: What You Need to Know

Presentation from IGD, providing insight on online innovations and best practice from an online perspective. Also includes an overview of Quick Commerce and how shoppers engage with these channels.

Kantar – Out of Home State of the Nation: What You Need to Think About in 2022

Presentation from Kantar focusing on the importance of value in the Out of Home Market and changes in consumer behaviour, as well as considering how this value can be delivered for consumers.

CGA – Drinks State of the Nation: What You Need to Think About in 2022

An update on the Out of Home Drinks market in Wales and GB from CGA which also focuses on emerging opportunities in market.

Value of Welshness: Out of Home Highlights

Highlights of the Value of Welshness Out of Home 2021 research, from the Insight Programme.

thefoodpeople – Top Ten Food & Drink Trends 2022-23

A dive into the key future food and drink trends that consumers are and will be engaging with, from thefoodpeople.

HFSS Impact for Food & Drink Manufacturers

Presentation from the Insight Programme, outlining the impact of HFSS legislation on food and drink manufacturers, as well as its potential opportunities.

2021 Reports

KANTAR PRESENTATIONS

CEO Cluster – Breakfast Series: 'New Context, New Challenges, New Opportunities'

Presentation from Andrew Walker, Client Knowledge Director at Kantar Worldpanel.

This presentation analyses changing shopping habits in 2020-21 and where the opportunities lie for food and drink in retail. Also includes interesting discussion around brand purpose, sustainability and Welshness.

KANTAR REPORTS:

Grocery Retail Performance

An overview of the total market in GB and Wales and across key subsectors in 2020.

Sustainability Transformation – Summary of Kantar Sustainability Webinars

A report from the Insight Programme pulling together recent Kantar presentations on sustainability.

Out of Home Review

An evaluation of the trends of consumer OOH spending in GB compared to Wales.

The Latest Retail Performance and Trends

An overview of the retail trends in 2020, including the impact of COVID-19 on category performance and shopper habits.

OTHER REPORTS:

Value of Welshness 4 – Eating and Drinking Out of Home

Presentation from the latest instalment of the Insight Programme's Value of Welshness research. Reveals key insights into guest and venue perceptions and attitudes towards Welsh food and drink OOH, including detail about consumer attitudes towards increased Welshness in public sector sourcing of food and drink.

Sustainability & Welshness: A Shopper's Perspective

Presentation from the Insight Programme, given at Taste Wales 2021. Explores key forces of change that will shape the future consumer landscape in Wales, focusing on sustainability and Welshness.

IGD – Sustainability & Shoppers: Today and the Future

Presentation from IGD, given at Taste Wales 2021. Explores sustainability, its impact on retailers and suppliers, and its importance to industry.

Understanding Online Shopper Purchasing Habits of SME Food & Drink Brands

Presentation from the Insight Programme exploring the different online shopper habits in Wales and GB including which shopper types buy which categories, when they buy and how often. Also includes a detailed breakdown of who buys food and drink gifts online.

Out of Home Half Year Summary

A summary report from the Insight Programme on Out of Home performance, pulling together recent analysis from CGA, IGD, and Kantar. Focuses particularly on Out of Home Drinks Market recovery, with detail on guest attitudes and trends.

IGD – European Retail Outlook

IGD Presentation to the Export Cluster on the European Retail Market for food and drink. This insightful presentation outlines the trends, challenges and opportunities for businesses exporting to European Retailers.

Attitudinal Shopper and Consumer Segmentation Powered by Digital Data

This cutting-edge shopper segmentation based on attitude will help businesses gain a deeper understanding of their target customers, how to refine their communication plans and optimise their trade discussions.

CGA Report: 2021 On-Trade Drinks Performance and Trends

Presentation from CGA (Hospitality Insight Specialists) that provides information for on-trade drinks performance and trends for GB and Wales in 2021 and 2022.

Note – The following presentations were given as part of the Welsh Government's Insight Conference 2021. Recordings of these presentations are available on the Food & Drink Wales Members Area

CGA Report: 2021 On-Trade Drinks Performance and Trends

GB and Wales market overview for On-Trade drinks in 2020, and prediction of upcoming trends in 2021.

Euromonitor Presentation: 2021 Markets that will renew quicker and emerging GB categories that could be ripe for export

Outlines the current state of UK food & drink exports and investigates the post COVID-19 economic outlook as well as future export trends.

The Food People: 2021-2022 Top Ten Food and Drink Trends

A summary of key future food and drink trends and identifying trends that consumers will engage with.

Trade Development Programme Presentation: 2021 Trading in Retail and Performing Better

Best practice and advice to achieve success through trading in retail.

Dylan's Presentation: 2021 Pivoting in the Pandemic

A case study of the diversification of Dylan's restaurant during 2020, and longer-term changes to the business.

Drinks Cluster Presentation: 2021 Using Insight in the On-Trade to Trade Better

A presentation outlining the importance of insight for successful Welsh on-trade performance in the Drinks Cluster- case study used to illustrate this.

BIC Innovation Presentation: Getting into Exports Presentation: 2021 Getting into Export and New Markets in Export

A step-by-step guide to the key foundations of setting up successful export relationships. Includes a case study with 9Brand.

Food Innovation Wales Presentation: 2021 Taking Insight into New Products

Illustrating how Food Innovation Wales can support NPD creation and business innovation and includes case studies with three businesses: VIT protein, Joe's Ice Cream and the Pudding Compartment.

2020 Reports

KANTAR REPORTS:

Grocery Retail Performance

An overview of the total market in GB and Wales and across key subsectors in 2019.

The Shopper of the Future

Report detailing the key forces of change that will shape and frame the consumer landscape in Wales over the next 3-5 years.

Who Cares, Who Does Sustainability Report

This report gives an in-depth overview of research into the environmental attitudes and actions of consumers around the world including GB and Wales.

Protein and Plant-based: Purchase and Consumer Perspectives

An overview of the Meat, Poultry, Fish, and Meat-free markets in the UK and Wales.

Total Cheese Review – Comparing Wales to the GB market

Overview of the UK and Wales cheese market from March 2020, including Covid-19 impact slides.

Out of Home Kantar Review

An evaluation of the trends of consumer OOH spending in GB compared to Wales.

INSIGHT PROGRAMME REPORTS:

Value of Welshness

Consumer research on attitudes towards Welshness in relation to Welsh food & drink.

2019 Reports

KANTAR REPORTS:

Grocery Retail Performance

An overview of the total market in GB and Wales and across key subsectors in 2019.

Consumer Usage Kantar Review

Also named as 'Maximising Growth Through Understanding Changing Needs. This report was presented at Taste Wales 2019 and investigates consumer food habits.

Out of Home Kantar Review

An evaluation of the trends of consumer OOH spending in GB compared to Wales.

Winning in Retail Kantar Review

Data on the performance of food and drink in the GB retail sector

THEFOODPEOPLE PRESENTATION:

Craveable Health

A visual presentation from thefoodpeople covering consumer interest in health, innovative NPDs and the importance of brand storytelling.

INSIGHT PROGRAMME SUMMARIES:

- **Cocktails** – summary of cocktail consumers in the UK. Included is information about spirits consumption.
- **Kids' Meals** – trends overview of kids' meals across the baby, toddler meal and older children's ready meal categories.
- **Switzerland Export Market Analysis** – summary of potential Welsh Government export markets with a focus on Switzerland.
- **Cheese Analysis** – summary of cheese to foodservice in the UK and export markets.

2018 Reports

KANTAR REPORTS:

Grocery Retail Performance

Kantar analysis of key food and drink subsectors for Wales in 2017.

Food and Drink Update – Total GB and Wales

Kantar analysis of the 2018 grocery update and breakdown of the trends impacting the market.

Our Nation Out of Home – Wales

An evaluation of the trends of consumer OOH spending in Great Britain compared with Wales.

The Cheese Market in Great Britain and Wales

A detailed report into the cheese market in Great Britain and Wales. Cheese has been broken down into seven different areas.

The Free-From Market in Great Britain and Wales

A report investigating the trends in allergies and how it effects purchases and consumer engagement in free-from products.

Healthy Desserts Great Britain

A detailed analysis of the healthy dessert industry in Great Britain. The healthy desserts are divided into three main categories: yogurts, chilled, and ice cream.

Importance of Health to the GB Consumer Kantar Review

Shows in detail the trends in the growing health food market. Includes analysis on the meat reducer consumer and the different elements of health foods.

Understanding the growth of vegetarianism and meat avoidance

An attempt to quantify the terms vegetarianism and meat avoidance. The results are broken down into different categories and measured using a range of indicators.

2017 Reports

KANTAR REPORTS:

Grocery Retail Performance

Kantar analysis of key food and drink subsectors for Wales

Our Nation Out of Home – Wales

Data on consumer purchasing of food and drink when out of home

Consumer Behaviour

Overview of consumer behaviours related to the purchase of food and drink – Wales vs GB

Understanding the growth of vegetarianism and meat avoidance

This report has attempted to quantify the term vegetarianism and meat avoidance. The results are broken down into different categories and are measured using a range of indicators.

Winning in Retail

Data on the performance of food and drink in the retail sector



Bwyd a Diod Cymru
Food & Drink Wales