



Euromonitor
International

Where Consumers Shop for Cooking Ingredients and Meals

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WHERE CONSUMERS SHOP FOR COOKING INGREDIENTS AND MEALS

Key findings

An industry prioritising value and convenience in the shopping experience

STATE OF THE INDUSTRY

A tenuous recovery from years of turmoil

Edible oils trails in value sales, but is dominant in importance to global consumers

Asia Pacific widens its lead as the largest region

E-commerce grows faster than offline channels but does not gain major ground

OFFLINE RETAIL

The industry's leading retail channels are losing share to emergent ones

Non-grocery channels are unlikely to pose any significant threat to grocery

Pricing power is a recurring tension between grocery retailers and food brands

Strong growth figures in grocery mask a channel experiencing major challenges

Discounters are the biggest beneficiaries of this affordability shift

Meanwhile, luxury grocery rises as a result of wellness trends and wealth inequality

Turkish discounter Bim prioritises affordability for inflation-weary consumers

RETAIL E-COMMERCE

E-commerce sales fall off dramatically as meal kit sales tumble

Slowing growth from core markets but faster growth from newer ones

Meal kits are losing their dominant sway in e-commerce in the category

The US widens its lead as the largest e-commerce market for cooking ingredients and meals

In plenty of markets e-commerce is playing only a very minor role

Meals and soups is the largest category, but growth has stalled

Grocery retailers have a virtually insurmountable lead in e-commerce

Walmart is the leading retailer in both online and offline channels

Case study: Factor proves vitality is still possible in retail meal delivery

CONCLUSION

Future shifts in industry channels

Recommendations

APPENDIX

Euromonitor Passport E-Commerce: Coverage and methodology

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-consumers-shop-for-cooking-ingredients-and-meals/report.