



# Consumers and Ready-to-Eat Meals: A Global ACNielsen Report

December 2006

# Ready-to-Eat Meals: Global Highlights

*Note: for the purpose of the survey and this report, ready-to-eat meals were defined as frozen or fresh, hot or cold, fully prepared meals purchased in a store to be eaten elsewhere. They aren't the same as take-away and fast food, and they aren't canned food.*

## **According to a Global Online ACNielsen Consumer Survey conducted in June 2006:**

- By far the biggest reason for purchasing ready-to-eat meals is convenience due to a lack of time to prepare a proper meal – 87 percent claimed it as their main / second reason for purchasing them.
- Consumers the world over don't have enough time to prepare meals from scratch. A separate Global ACNielsen Online survey asked consumers in 41 countries whether they had too much, enough or too little of time, information, energy, space and money. At the top of the list, and not surprisingly, three quarters of consumers said they didn't have enough money. In second place, just over half 56 percent said they didn't have enough time.
- Beyond convenience, one third cited cheaper than buying all the ingredients and preparing from scratch as their reason for purchasing them.
- One fifth of the world's Internet consumers 'frequently' purchase ready-to-eat meals rather than prepare traditional meals from scratch, and close to half (45%) do so 'occasionally'.
- The most common occasion for eating ready-to-eat meals is for *Dinner*, and *Breakfast* is the least likely.
- The most popular types of ready-to-eat meal for a quarter of consumers are *Main Course* substitutes or an *All-in-One Meal*.
- Overwhelmingly, the most popular place to purchase ready-to-eat meals for nearly half of the world's Internet users is in a *Supermarket* (44%), followed at a distant second by *Grocery Stores* (22%), although North Americans are nearly as likely to purchase them in a *Grocery Store* as they are in a *Supermarket*.

# Ready-to-Eat Meals: The Full Report

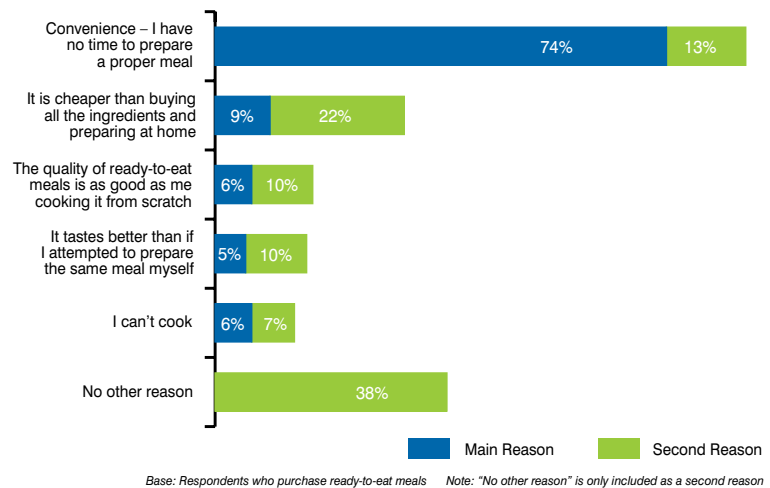
**Overwhelmingly, and unsurprisingly, the biggest single reason for buying ready-to-eat meals is convenience!**

A global ACNielsen survey of over 22,000 Internet users around the world has confirmed that the biggest single reason for purchasing ready-to-eat meals is convenience! With less time on their hands to prepare meals from scratch, 83 percent of the world's consumers are in agreement that ready-to-eat (RTE) meals come in handy when there's no time to prepare a meal from scratch.

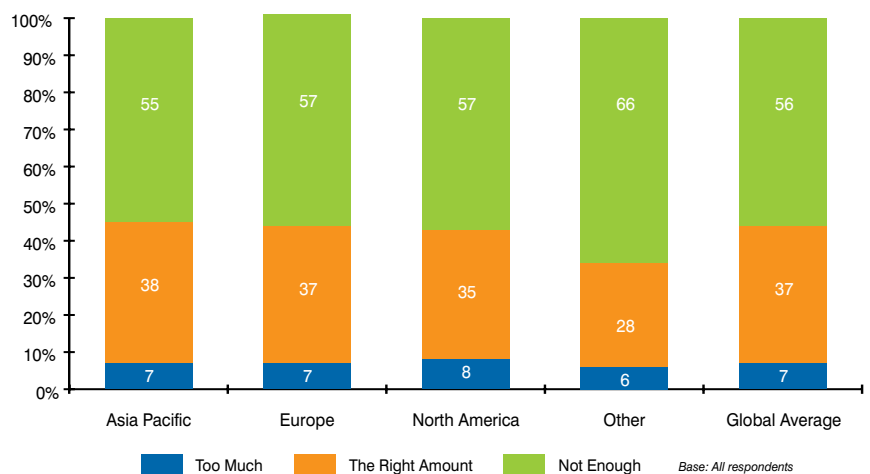
**While we can never have too much Money, we certainly don't have enough time to spare.**

In a separate survey to the same Internet users, ACNielsen asked, of the five main resources they had to deal with their daily lives, which did they have too much, the right amount or not enough of: Time, Information, Energy, Space and Money? The survey found – not surprisingly – 74 percent of consumers who claimed they didn't have enough Money, with the other quarter saying they had the right amount. After Money, just over half (56%) said they didn't have enough Time.

What is your main and second reason for purchasing ready-to-eat meals?  
Global average



Resources available to you: Time

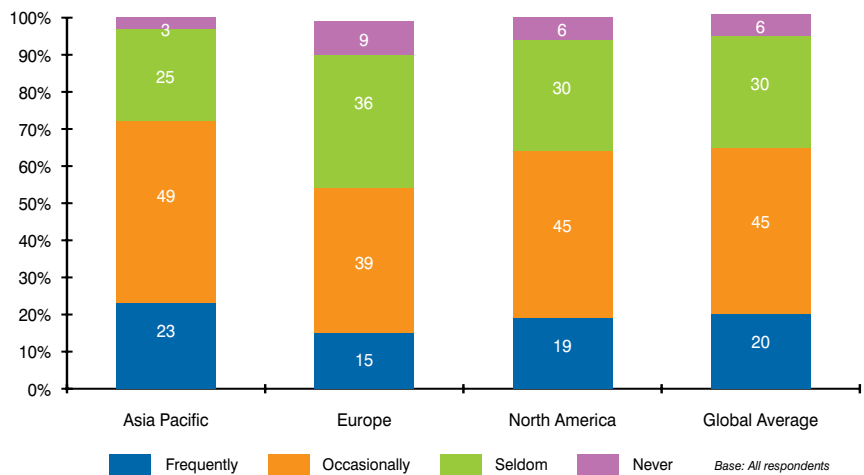


**Asians embrace RTE, while Europeans are more likely to prepare meals from scratch.**

Across the globe, 65 percent of the world’s Internet users purchase RTE meals either frequently (20%) or occasionally (45%). The biggest fans of the ready-to-eat meal concept, comprising seven of the top 10 markets who claim to purchase them frequently, hail from Asia, lead by Thais (43%), Chinese (39%), Taiwanese and Malaysians (34%). And of the top 10 markets with consumers purchasing them occasionally, seven are also from Asia, led by the Japanese (59%), Vietnamese (57%) and Chinese (51%).

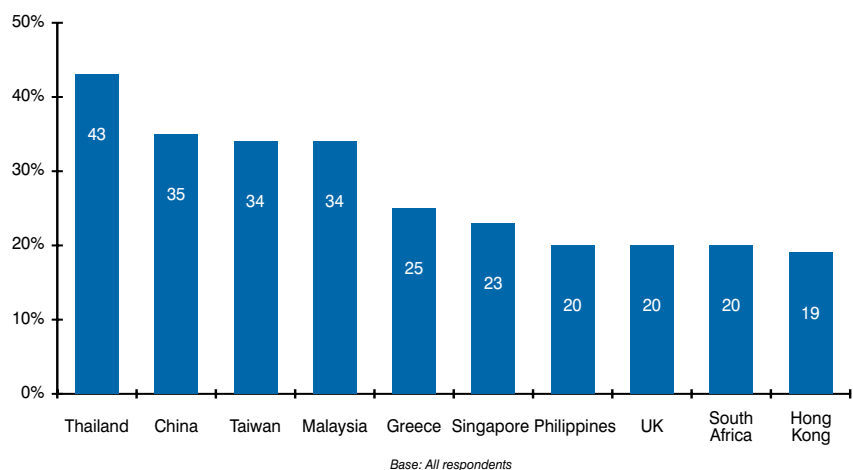
Across Asia, it is not uncommon for people to purchase a pre-prepared meal, in full or part, on their way home from work, to be reheated and consumed later. And as the range and availability of RTE continues to grow, this trend is likely to continue. Across the region, some of the fastest growing categories are in the RTE sector. In Hong Kong, for example, 2005 volume sales of Frozen Ready Meals and Frozen Dim Sum both grew 17 percent compared to the previous year. And in Japan, 2005 volume sales of Microwave Instant Foods grew seven percent compared to the previous year.

**How often do you purchase ready-to-eat meals rather than traditional meals made from scratch?**



**How often do you purchase ready-to-eat meals rather than traditional meals made from scratch?**

**Top 10 - Frequently**



Additionally, Ready to Drink Teas and Coffees are also experiencing significant growth, as multinational FMCG companies launch new variants such as fruit teas and chilled coffees, and grow this segment.

**The Danes lead the global rankings in Seldom, or Never, purchasing RTE.**

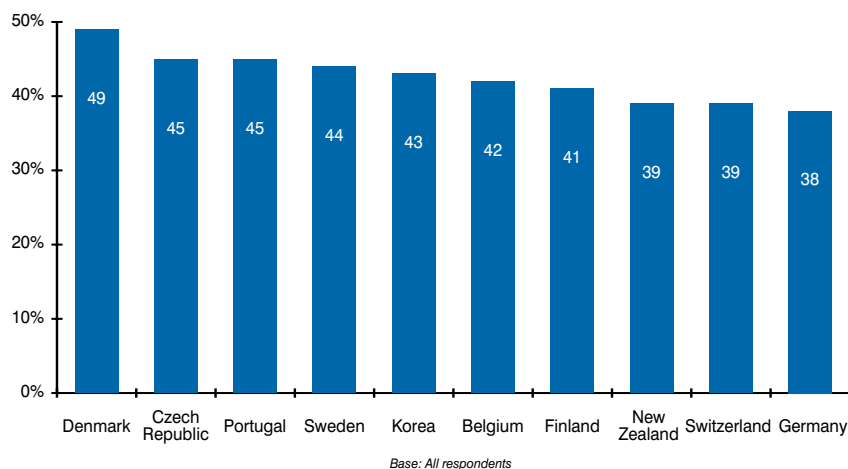
Close to one third of consumers claim to 'seldom' purchase ready to eat meals, and six percent never do. Most likely not to - comprising eight of the top 10 markets who seldom purchase them - are Europeans, led by nearly half the Danes (49%), Czechs and Portuguese (45%). In fact, a further 19 percent of Danes also claim never to purchase them.

**Dinner is the most common RTE meal occasion, and breakfast the least likely. But when it comes to entertaining friends or a special occasion, there's nothing like good old-fashioned, home cooking.**

By far the most common RTE occasion for consumers is Dinner – for a quarter of respondents - followed by a Snack (19%) and Lunch (17%). Conversely, over half (56%) would never opt for an RTE breakfast. Particular exceptions to this are the French and Swiss, with 91 and 76 percent of consumers respectively, claiming they would normally eat a RTE meal for breakfast.

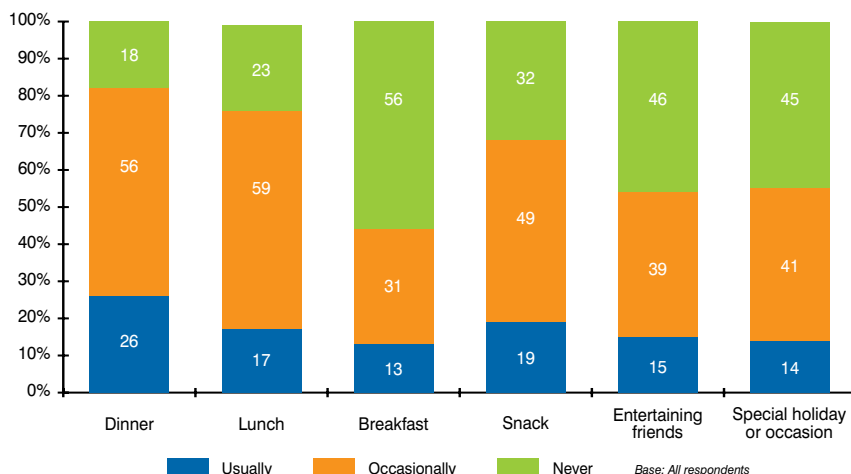
**How often do you purchase ready-to-eat meals rather than traditional meals made from scratch?**

Top 10 - Seldom



**When you purchase a ready-to-eat meal, when do you eat it?**

Global average



The French also lead the global RTE snack ranking, with 70 percent claiming to eat RTE meals as a Snack.

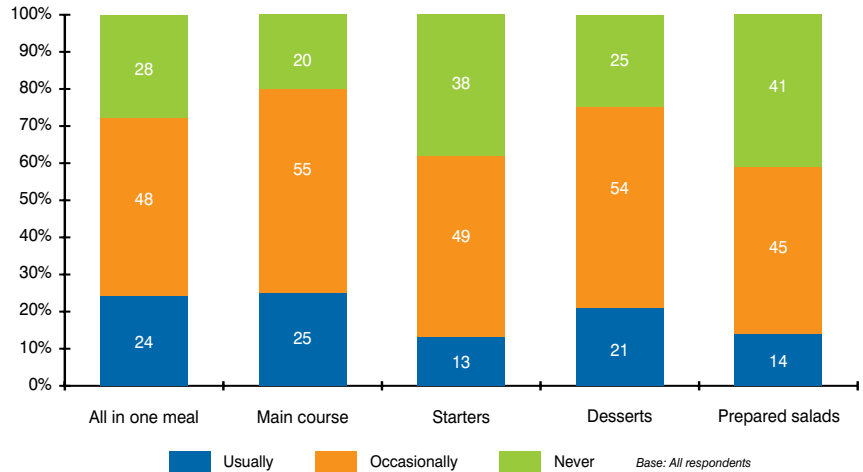
When it comes to Entertaining Friends and a Special Holiday or Occasion, nearly half of consumers are unwilling to substitute the real thing for a shop-prepared, ready-to-eat meal option, preferring to prepare their meals from scratch. In the global ranking, however, nearly two thirds of French and Swiss, would use a RTE meal for Entertaining Friends.

**Main course or all-in-one meals are the most popular RTE option.**

Globally, a quarter of people purchase either a main course or all-in-one RTE meal. 74 percent of Thais top the global rankings, purchasing RTEs as an all-in-one meal, followed by the French and the Swiss. And 59 percent of Greeks opt for a RTE main course.

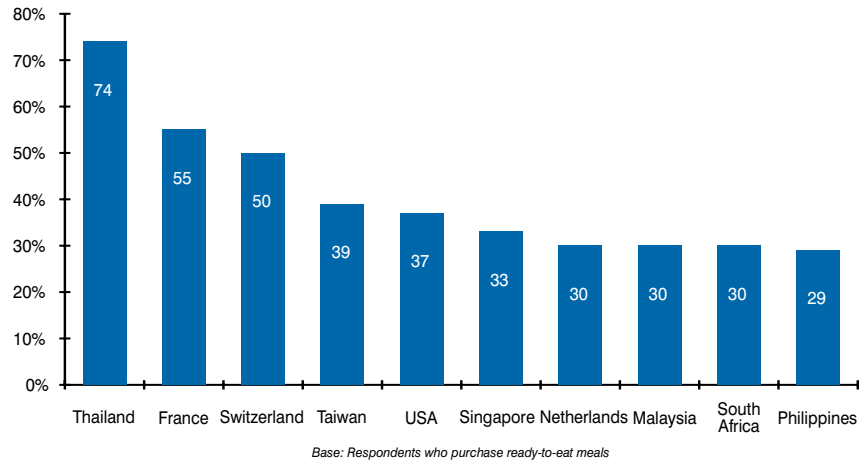
**What kind of ready-to-eat meals do you most commonly purchase:**

Global average



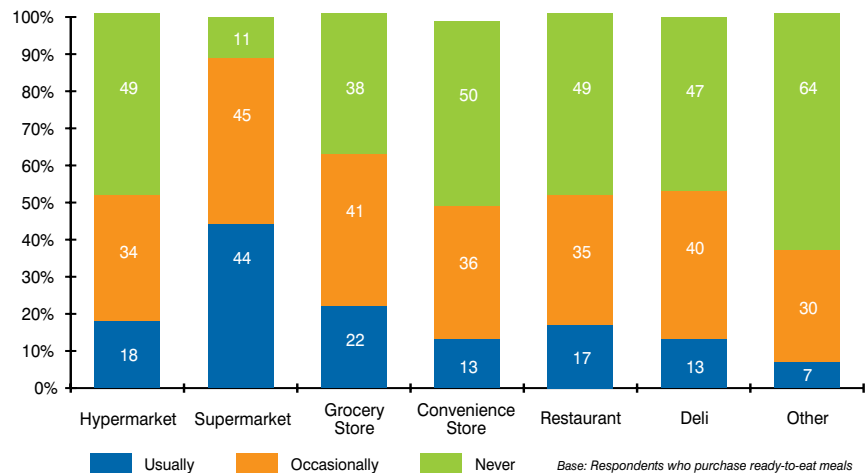
**What kind of ready-to-eat meals do you most commonly purchase:**

Top 10 – Usually all-in-one meal



**Where do you normally purchase your ready-to-eat meals:**

Global average



**Supermarkets the most convenient channel for purchase globally.**

Overwhelmingly, the world’s consumers head for the Supermarket to purchase their ready-to-eat meals, lead by the Chinese (74%), British (68%) and Dutch (63%)

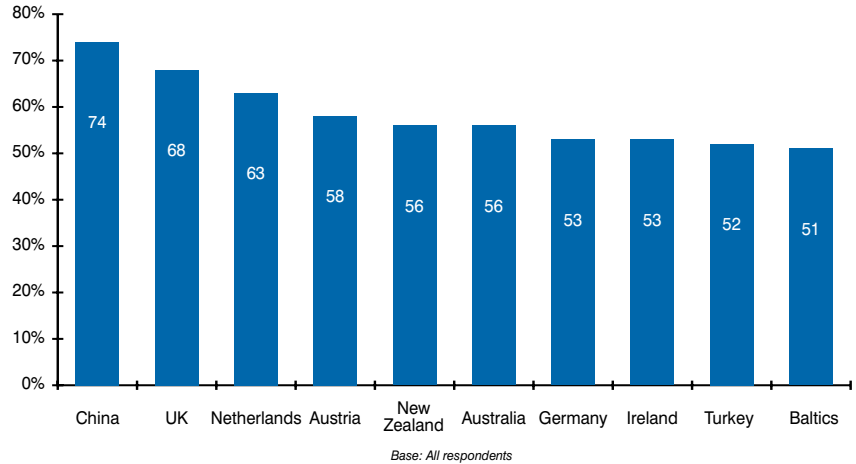
The grocery store, however, remains a popular option, particularly for the French and Swiss, when it comes to picking up a convenient RTE meal.

**Implications for the Future.**

Can we expect one day to see the kitchen fully redundant in the family home, as consumers opt to eat out or take home and re-heat in a microwave? While ready-to-eat meal offerings have developed to meet the need for ease of use and convenience, as consumers increasingly focus on fresh, healthier eating options, the trend may well come full circle. Just as we have seen with pre-washed and cut salads, consumers will look for other pre-prepared raw ingredients they can take home and ‘assemble’ into a healthy meal.

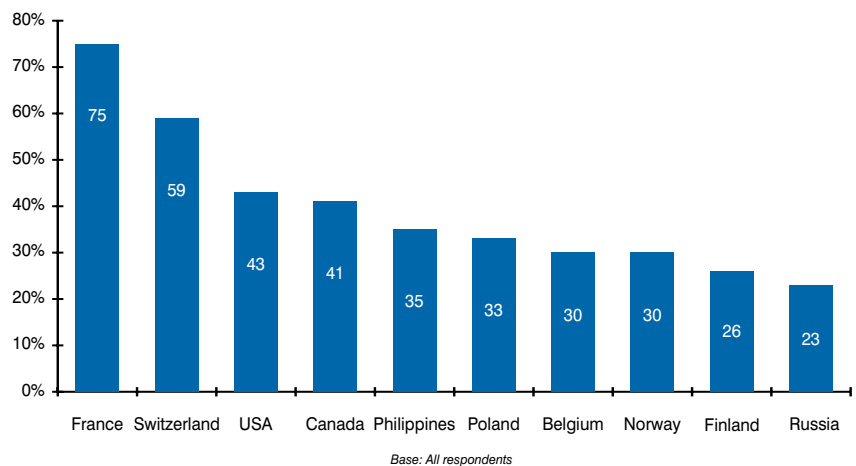
**Where do you normally purchase your ready-to-eat meals?**

Top 10 – Usually Supermarket



**Where do you normally purchase your ready-to-eat meals?**

Top 10 – Usually Grocery Store



**RTE Problem or Opportunity?**



## The Survey

The ACNielsen Online Consumer Confidence and Opinion Survey is the largest half-yearly survey of its kind aiming at gauging current confidence levels, spending habits/intentions and current major concerns of consumers across the globe. The ACNielsen Consumer Confidence Index is developed based on consumer's confidence in the job market, status of their personal finance and their readiness to spend. The latest survey, conducted in late May/early June, polled about 22,780 internet users in 41 markets from Europe, Asia Pacific, North America to the Baltics.

## About ACNielsen

ACNielsen, a VNU business, is the world's leading marketing information provider. Offering services in more than 100 countries, the unit provides measurement and analysis of marketplace dynamics and consumer attitudes and behaviour. Clients rely on ACNielsen's market research, proprietary products, analytical tools and professional service to understand competitive performance, to uncover new opportunities and to raise the profitability of their marketing and sales campaigns. To learn more, visit [www.acnielsen.com](http://www.acnielsen.com).

## The 41 Markets covered in the Global Online Survey were:

### Europe:

Austria  
Belgium  
Czech Republic  
Denmark  
Finland  
France  
Germany  
Greece  
Hungary  
Ireland  
Italy  
Netherlands  
Norway  
Poland  
Portugal  
Spain  
Sweden  
Switzerland  
Turkey  
UK

### Baltics:

Estonia  
Latvia  
Lithuania

### Asia Pacific:

Australia  
China  
Hong Kong  
India  
Indonesia  
Japan  
South Korea  
Malaysia  
New Zealand  
Philippines  
Singapore  
Taiwan  
Thailand  
Vietnam

### North America:

USA  
Canada

### Other:

Russia  
South Africa

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