

The Grocer

Focus On: lunchbox by Natalie Brown (natalie_brown@live.co.uk)

Publishing: 4 July
Advertising deadline: 12 June
Submissions deadline: 5 June

The Story

- **More and more Brits are leaving their lunchboxes at home, according to exclusive research for The Grocer. In the past year there's been a 7% decline in packed lunch consumption, with those consumed by kids aged between five and nine falling a whopping 28.6% following the introduction of free school meals last September. So what does all this mean for brands that rely on packed lunches for the bulk of sales? Is the packed lunch dead and buried or are there still opportunities here? Which age groups and occasions should brands be chasing?**

Key themes:

Kids: This feature will explore what impact of the introduction of free school meals for kids aged five to nine last September has had on this market. How have brands – everyone from snack and drinks to cheese and yoghurt players – that rely on the kids' lunchboxes market been affected? How have they adapted in light of this?

Health: Perhaps surprisingly, given the growing focus on healthy eating, fruit's share of Britain's lunchboxes has declined over the past year. Why? How is the whole health debate affecting what people are choosing to put in their own and their kids' lunchboxes? We will be conducting our own consumer research into consumer attitudes to healthy eating and the role of schools.

Pack lunch components: This feature will explore in detail the choices consumers are making when it comes to packing their lunches and how these choices are changing. We will be looking at all the staple packed lunch components – fruit; sandwiches; crisps; etc – to newer, more unusual products that are trying to win greater share of the Great British lunchbox.

Breakfast: Of course lunchboxes aren't necessarily only for lunch; and the number of occasions in which Brits have packed their own breakfast to be consumed out of the home has actually increased over the past year. Why? Which brands have helped drive this growth? What are we choosing to pack up for breakfast on the go?

Convenience retail and meal deals: This feature will explore in detail the impact of convenience retailers and multiples offering £3 lunch deals and alike is having on Britain's willingness to pack a lunchbox of a morning.

Price & promotions: This will be paid particularly close attention in this feature. How important are deals for player looking to win share of our packed lunches? How vital is it for brands to hit certain price points in the current climate? And how is the use of meal deals by retailers affecting whether or not we will pack our own lunch?

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2014. We will be profiling 12 of the most interesting launches in a separate innovation panel, featuring everyone from cheese to chocolate brands, crisps, nuts and snacks to savoury pastries, drinks and so on...

Formats: This feature will explore in detail how much of an opportunity there is for brands looking to get inside our lunchboxes to do so by innovating in terms of formats. Who's leading the way? Are there any good example of innovative formats from abroad?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Box-outs:

4 x drinks innovations: We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.

4 x snacks innovations: We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.

4 x main meal components innovations: We profile four new products or product ranges that have ideally not appeared in The Grocer before, including launch date and RSP.

Breakfast on the go: Kantar data shows that there has been an increase in Brits packing their own breakfasts. Why? What are they choosing to pack when they need brekkie on the go and which brands have cashed in on this?

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?