New product development activity during the Covid-19 pandemic in the UK

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Abstract

The introduction of new products is a permanent and important part of the functioning of food supply chains and their companies. Companies introduce new products at an increasing rate to enhance their competitive posture or even to survive. The new products that are launched at a point in time can be considered as representing firms' expectations of what consumers want in terms of different product attributes such as: health, environment, flavours. The Covid-19 pandemic disrupted the operation of supply chains, and the purpose of this paper is to explore what was the reaction of firms (if any) due to the pandemic regarding the introduction of new products. This was done using Mintel's Global New Product Development (GNPD) data for the UK, for the period 2018-20 and considering 155 food and drink categories. Each category was described in terms of the attributes (i.e., marketing claims) of its products. Same groups in different years were compared using measures of similarity between profiles (the profile being represented by the attributes that were present in a category). The results indicate that the most popular attributes within the products launched after March 2020 were those related to health and nutrition; however, comparison with previous trends indicate that firms may not have change their path when launching new products.

Keywords: New product development, Covid-19, UK

I. Introduction

The introduction of new products is a permanent and important part of the functioning of food supply chains and their companies. Companies introduce new products at an increasing rate to enhance their competitive posture or even to survive (Fuller, 2004).

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As it is documented in the literature, the Covid-19 pandemic disrupted the operation of supply chains in different ways such as sudden changes in the demand or affecting the labour force (Costa-Font and Revoredo-Giha, 2020). Most of the literature in developed countries focused on highlighting changes in consumption patterns and the efforts of supply chains to continue producing. However, it may also provide opportunities for firms to introduce products and take advantage of the anomalous situation that households, e.g., contraction of their demand for eating out, staying significantly more time at home as part of the lockdown periods. Thus, firms had the possibility to take advantage of different consumer trends in order to capture an increasing share of the market. On the one hand, they could have, for instance, launched or modified existing products to make them more sustainable or healthier. On the other hand, they could have possibly launched products with similar attributes (e.g., just modifying flavours) aiming just to please consumers.

The purpose of this paper is to explore what the reaction of firms (if any) was due to the pandemic when launching of new products. Of particular interest is whether they focused on launching products with improved health and nutritional characteristics as well as towards sustainability.

The structure of the paper is as follows: it starts with a brief literature review focused on the topic of launching of new food products during the COVID-19 period. It is followed by the methodology of the paper, which describes the data and the statistical methods of the analyses. Next, the results are presented and finally the conclusions of the analysis are reported.

II. Literature review

According to Rudder (2003) food manufacturers [including not only those providing own brands but also producing retailers' private labels] strive to meet the changing needs of food consumers who are increasingly demanding new and better products. It is not longer possible for a company to rely solely on its existing products. If a company will not provide new product developments (NPDs) there are plenty of competitors that will do their best to fill the gap (p. 460).

The period associated with the lockdown in the UK (which in this paper is assumed from March 2020 onwards) has been one with significant changes for both, food supply chains and consumers. The period has been characterised by movement restrictions and spontaneous reduction of social interaction determined the substitution of food services (such as restaurants and catering) with at-home consumption.

Uncertainty regarding grocery shortages triggered stockpiling behaviour (Wang et al., 2020; Costa-Font and Revoredo-Giha, 2020). Nicola et al. (2020) reported that "panic-buying has resulted in an increase of £1bn worth of food in UK homes". The combination of different effects (e.g., stockpiling) might explain the surge in home consumption during the outbreak period, and the declining trends thereafter. During the lockdown period the stockpiling effect faded, as home stocks were full and the perceived risk of food supply

disruption declined, but movement restriction sustained home consumption as a substitute for away-from-home meals. In the post-lockdown periods, only the voluntary reduction of social interaction remained, and consumption trends slowly were reverting to pre-emergency levels (Revoredo-Giha and Russo, 2021).

Revoredo-Giha et al. (2022) analysed fruit and vegetable purchases (fresh and processed) by type of outlet using the Impact-Reaction framework (OECD, 1993). According to it reaction to psychological pressure triggered changes in consumer mood and attitude, resulting in new purchasing behaviour. In the early stages of the pandemic, even before the national emergency was declared, UK consumers displayed panic buying, and stockpiling behaviour (e.g., Naeem, 2020; Chronopoulos, Lukas, & Wilson, 2020), which may be interpreted as a precautionary response to the fear of future scarcity and restrictive measures on mobility.

Concerns about future food availability, leading to hoarding and stockpiling behaviour (Naeem, 2020; Yuen et al., 2020), may result in a relative preference toward non-perishables processed fruit and vegetables over fresh ones. O'Connell, De Paula, and Smith (2021) analysed a balanced panel data of 17,093 UK households from January 1, 2019, to August 9, 2020, and found that, there was a spike in household purchases prior to the first nationwide lockdown in March 23, 2020. The authors observed sharp increase in staples (including canned products) purchases relative to perishable products (including fresh fruit and vegetables) which showed a moderate increase only.

Psychological pressure can affect dietary choices in other ways as well. On the one hand, health concerns may result in a relative preference toward fresh fruit and vegetables due to a focus on healthy nutritional balance, hoping to boost human immune system and possibly the resistance to contagion (Muscogiuri et al., 2020, Jayawardena, & Misra, 2020; Aman & Masood, 2020). On the other hand, anxiety and fear may lead to an increase in consumption of comfort food such as snacks, confectionery, sweets, alcohol (Salazar-Fernandez et al., 2021) to the possible detriment of fruit and vegetables.

Based on the literature, it is possible to conclude that changes in consumer mood and attitude due to psychological pressure may drive consumption of fruit and vegetables into different directions and the net effect depends on which component prevails.

Reactions to the COVID-19 impact include adopting a stay-home lifestyle. Due to fear of contagion, restrictive measure, at-home working or involuntary unemployment, UK consumers spent more time at home than they did before the pandemics. The obvious consequence was a sharp decrease in the number of times consumer ate out and an increase in the budget expenditure for grocery product. Studies about the effect of stay-home lifestyle on dietary habits found conflicting results (Bennet et al., 2021). On the one hand, it was associated with healthy eating due to home cooking (e.g., Flanagan et al., 2021). On the other hand, confinement was found to lead to increase in

consumption of comfort food, less exercise and more TV (Ruiz-Roso et al., 2020). The net effect of the two trends is an empirical question to be addressed. Furthermore, it must be noted that changes in employment status may affect consumer reaction deeply.

Revoredo-Giha et al. (2022) also found that UK consumers reacted to the impact of COVID-19 by adjusting their shopping behaviour, that is the way they purchased food. Online purchases increased during the pandemics both from de-specialized retailers (such as Amazon) and specialised food retailers developing online services along their traditional "brick and mortar" stores (such as Tesco online) (e.g., Sheth, 2020; Dannenberg et al., 2020). Consumers optimized shopping frequency and store choice given the new sets of constraints to mobility and accounting for the possibility of contagion (e.g., Janssen et al., 2021). The emerging shopping behaviour is expected to affect consumption in two main ways. Firstly, changing food source (for examples, from far, large supermarket to local stores or to online), consumers are exposed to different assortments, and this may result in an adjustment in purchases. Secondly, the objective of reducing shopping frequency may lead to a preference for non-perishable goods in order to avoid waste and extend the time before a new trip to the store is needed.

To our knowledge there have been no attempt to explore the behaviour of NPD on the food sector in the UK. Given the number of consumer reactions to the COVID related situations, it would be interesting how the launching of products was adapted to try to capture changes in consumers' preferences. This is the purpose of the paper.

III. Methodology

III.1 Data

The analysis was carried out using Mintel's Global New Product Development (GNPD), which is a database that records the launching of new products at the retail level (Solis, 2016).

The data include information about the firm launching the product, the sector and subsector, the type of launching (e.g., it was a new product, a relaunching, new packaging). In this sense, the products launched by firms include not just those that are new products but also those with new packaging, reformulated, relaunched, etc. This is the same approach suggested by Fuller (2003).

The data used was for the UK, for the period 2018-20 and considered 155 food and drink categories and 95 attributes (i.e., marketing claims). Each food category was described in terms of the attributes of its products (i.e., the profile of the category). Two measures where considered: (1) for each food and drink category the percentage of products containing a particular attribute was computed (relative) and (2) the number of products with a particular attribute within a category.

III.2 Statistical methods

Two statistical analyses were carried out: first, the same categories in different years were compared using measures of similarity between profiles (the profile being represented by the attributes that were present in a category).

The indicators used were correlation indicators such as those use in psychology to compare the characteristics of two individuals (Abdel-Aty, 1960). Due to its straightforward implementation and interpretation the intraclass Fisher correlation was estimated to compare the profiles between categories in two years. The correlation coefficient is defined as:

$$r_{in} = \frac{\sum_{j=1}^{p} (x_{1j} - \bar{x}) (x_{2j} - \bar{x})}{0.5 \sum_{i=1}^{2} \sum_{j=1}^{p} (x_{ij} - \bar{x})^{2}}$$

Where x_{1j} and x_{2j} are two profiles for a food and drink categories in two years, for j=1 to p (attributes). \bar{x} is the mean of the two sets of scores (both years) and the denominator of the expression is the average of the variances.

The second analysis consisted of the following simple panel data model where y_{it} is either the proportion of products launched on food product category in 2019 and 2020 or the total number of products launched within a food category with a particular attribute. Hence, there are two observations for each food category. The following regression were then estimated:

$$y_{it} = \beta_0 + \beta_1 d_{20}$$

Where d_{20} is a dummy that takes the value of 1 is the observation is of 2020 and 0 otherwise. In addition, in other to identify particular categories where a particular attribute was introduced or significantly increased the following regression was estimated, where d_j is a dummy that takes the value of 1 for the category j and 0 otherwise.

$$y_{it} = \beta_0 + \beta_1 d_{20} + \beta_2 d_{20} \cdot d_j$$

 β_2 that is positive and statistically significant indicates that in 2020 an increasing share or number of products containing the attribute was present for the category.

IV. Results

The first step is to show the trend of the number of products launched in 2019 and 2020. Figure 1 shows that despite the disruption created by the lockdown due to COVID-19 the launching of product continued although with a decreasing trend.

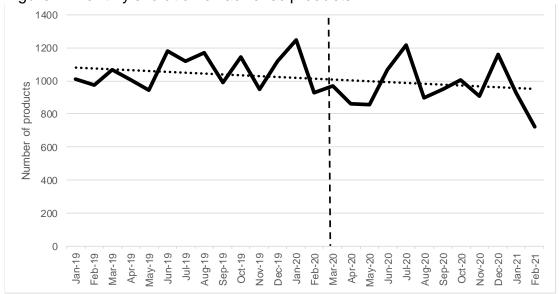


Figure 1: Monthly evolution of launched products

Source: Mintel's GNPD data.

Note: Dotted line indicates the approximate data of the lockdown in the UK.

Figure 2 shows that the trend by launch category has continued similar in 2020 with respect to the levels of 2019. The total number of products launched by food category are presented in Table A.1 in the Annex.

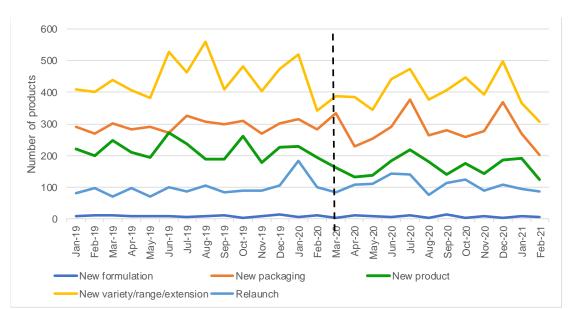


Figure 2: Monthly evolution of launched products by type of launching

Source: Mintel's GNPD data.

Note: Dotted line indicates the approximate data of the lockdown in the UK.

Figure 3, which uses the correlation coefficients, shows that the attributes that about 50 per cent of the food and drink categories have high correlation on the profiles (i.e., comparing the 2018-19 and 2019-20 coefficients).

Figure 3: Distribution of food and drink categories according to correlation coefficient

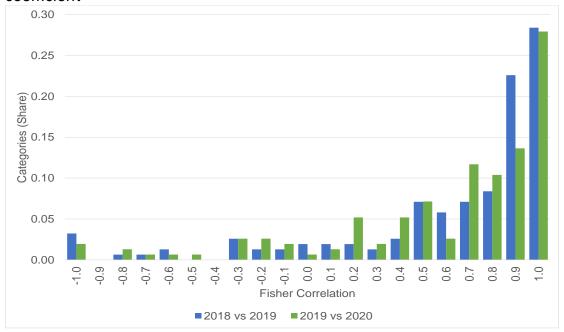


Figure 4 shows the information of Figure 3 in an XY graph trying to identify patterns. Clearly the high degree of similarity is given by the number of product categories on the diagonal. Table 1 shows an analysis of those attributes by product category that shown an increase in the share or products in 2020 with respect to 2019. As shown in the table there is high heterogeneity in the results and the attributes shown by analysing shares not necessarily match with the analysis by products.

Figure 4: Food and drink categories according to correlation coefficient 2018-19 and 2020-21.

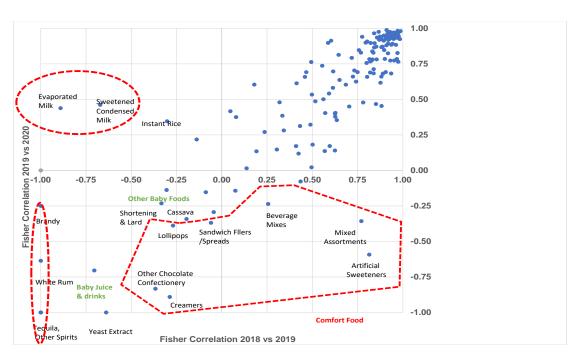


Table 1: Increased attributes in 2020 with	
Based on shares	Based on number of products
All the products	_
Economy	Economy
Limited Edition	
Baby Biscuits & Rusks	
Ethical - Environmentally Friendly Package	
Ethical - Recycling Ethical - Sustainable (Habitat/Resources)	
Ethical - Sustainable (Habitat/Resources) Baby Cereals	
Carbon Neutral	Babies & Toddlers (0-4)
Calbon Noutial	Carbon Neutral
	Vitamin/Mineral Fortified
Baby Formula (0-6 months)	
Carbon Neutral	Babies & Toddlers (0-4)
Ethical - Animal	Carbon Neutral
Functional - Eye Health	Functional - Eye Health
Palm Oil Free	·
Baby Formula (6-12 months)	
Added Calcium	Added Calcium
Ethical - Toxins Free	Babies & Toddlers (0-4)
Functional - Bone Health	Functional - Bone Health
Functional - Eye Health	Functional - Eye Health
Functional - Immune System	Functional - Immune System
Functional - Other	
Palm Oil Free	
Baby Fruit Products, Desserts & Yogurts	D 1: 0 T 1 (0.4)
Debu Covering Mode 9 Dishes	Babies & Toddlers (0-4)
Baby Savoury Meals & Dishes	Dobico 9 Toddloro (0.4)
Microwaveable Baby Snacks	Babies & Toddlers (0-4)
Functional - Other	Babies & Toddlers (0-4)
Bean-Based Snacks	Dables & Toddlers (0-4)
Ethical - Charity	
Female	
Male	
Palm Oil Free	
Beverage Concentrates	
Economy	
Beverage Mixes	
Functional - Bone Health	
Limited Edition	
Vitamin/Mineral Fortified	
Brandy	
Limited Edition	
Premium	
Bread & Bread Products	Faanamy
	Economy Functional - Bone Health
	Prebiotic
Cakes, Pastries & Sweet Goods	i icolotic
Junes, Fusilies & Officer Cooks	Ethical - Environmentally Friendly Package
	Ethical - Recycling
	Limited Edition
Cassava & Other Root-Based Snacks	
Carbon Neutral	Carbon Neutral
Ethical - Charity	

Table 1: Increased attributes in 2020 with respect to 2021 by product category (cont.)

(COIIL)	Daniel an according to
Based on shares	Based on number of products
Chilled Desserts	Ethiop Environmentally Estandly Dealers
	Ethical - Environmentally Friendly Package Ethical - Recycling
Coffee	
Ethical - Sustainable (Habitat/Resources)	Carbon Neutral Limited Edition
Cold Cereals	
Female	Functional - Bone Health
Male	Functional - Cardiovascular Functional - Immune System
	Functional - Other
	Prebiotic
	Vitamin/Mineral Fortified
Confiture & Fruit Spreads	
	Diabetic
Curd & Quark	
Economy Dairy Based Ice Cream & Frozen Yogurt	
Daily Based Ice Cream & Prozen Toguit	Limited Edition
Drinking Yogurt & Liquid Cultured Milk	
Functional - Immune System	Functional - Immune System Prebiotic
Dry Soup	
Economy	
Eggs & Egg Products	Ethical Asimal
Ethical - Animal	Ethical - Animal
Energy Drinks	Vitamin/Mineral Fortified
Evaporated Milk	Vitaliiii yiviii leta T Ottii lea
Economy	
Ethical - Environmentally Friendly Package Ethical - Recycling	
Fish Products	
Ethical - Sustainable (Habitat/Resources)	Economy
	Ethical - Animal
	Ethical - Environmentally Friendly Package
	Ethical - Recycling Functional - Eye Health
Flavoured Milk	i unotional - Lye i leatti
Functional - Bone Health	Functional - Bone Health
Vitamin/Mineral Fortified	
Flavoured Water	
Carbon Neutral	Carbon Neutral
Ethical - Charity Functional - Skin	
Nails & Hair	
Frozen Desserts	
Limited Edition	Limited Edition
Premium	
Fruit Snacks	
Convenient Packaging Refill/Refillable	Refill/Refillable
Fruit/Flavoured Still Drinks	
Functional - Immune System	Functional - Immune System
Functional - Skin	
Nails & Hair	
Vitamin/Mineral Fortified	

Table 1: Increased attributes in 2020 with respect to 2021 by product category (cont.)

(cont.)	
Based on shares	Based on number of products
Gin	
Premium	Limited Edition
Growing Up Milk (1-4 years)	
Added Calcium Carbon Neutral Functional - Bone Health Functional - Eye Health Functional - Immune System	Added Calcium Babies & Toddlers (0-4) Functional - Bone Health Functional - Eye Health Functional - Immune System
Functional - Other Palm Oil Free	Functional - Other Vitamin/Mineral Fortified
Gum	
Anti-Bacterial Economy Functional - Bone Health Whitening	Anti-Bacterial Whitening
Hard Cheese & Semi-Hard Cheese	
11.40	Economy
Hot Cereals Microwaveable Individually Wrapped Chocolate Pieces	
Ethical - Sustainable (Habitat/Resources) Limited Edition	
Instant Noodles	
Low/No/Reduced Saturated Fat Instant Pasta	
Microwayeable	
Instant Rice Ethical - Environmentally Friendly Package Ethical - Recycling	
Juice	
Functional - Immune System Functional - Skin Nails & Hair	Carbon Neutral Economy Functional - Bone Health Functional - Cardiovascular Functional - Immune System Functional - Other Functional - Skin Nails & Hair Vitamin/Mineral Fortified
Liqueur	
Limited Edition	Limited Edition
Margarine & Other Blends Ethical - Sustainable (Habitat/Resources) Low/No/Reduced Lactose Low/No/Reduced Saturated Fat Plant Based Stanols/Sterols	
Mayonnaise Ethical - Animal	
Meal Kits	
Low/No/Reduced Saturated Fat	
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Table 1: Increased attributes in 2020 with respect to 2021 by product category (cont.)

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Non-Individually Wrapped Chocolate Pieces Innovative Ingredient Nut Spreads Ethical - Toxins Free Nutritional & Meal Replacement Drinks Female Functional - Other Functional - Skin Innovative Ingredient Innovative Ingredient Innovative Ingredient Innovative Ingredient Innovative Ingredient Nails & Hair Nails & Hair Vitamin/Mineral Fortified Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Innovative Ingredient Nut Spreads Ethical - Toxins Free Nutritional & Meal Replacement Drinks Female Functional - Bone Health Functional - Other Functional - Skin Innovative Ingredient Innovative Ingredient Innovative Ingredient Male Nails & Hair Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Rutritional & Meal Replacement Drinks Female Functional - Skin Functional - Skin Innovative Ingredient Limited Edition Male Nails & Hair Vitamin/Mineral Fortified Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Ethical - Toxins Free Nutritional & Meal Replacement Drinks Female Functional - Bone Health Functional - Other Functional - Skin Innovative Ingredient Innovative Ingredient Innovative Ingredient Limited Edition Male Nails & Hair Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Nutritional & Meal Replacement Drinks Female Functional - Bone Health Functional - Other Functional - Skin Innovative Ingredient Innovative Ingredient Innovative Ingredient Limited Edition Male Nails & Hair Nails & Hair Nuts Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Female Functional - Bone Health Functional - Other Functional - Skin Innovative Ingredient Innovative Ingredie
Functional - Skin Innovative Ingredient Limited Edition Male Nails & Hair Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Innovative Ingredient Male Nails & Hair Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Innovative Ingredient Male Nails & Hair Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Male Nails & Hair Vitamin/Mineral Fortified Nuts Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Nuts Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Diabetic Oils Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Diabetic Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Other Baby Food Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Ethical - Charity Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Ethical - Sustainable (Habitat/Resources) Microwaveable Vitamin/Mineral Fortified
Microwaveable Vitamin/Mineral Fortified
Vitamin/Mineral Fortified
Convenient Packaging Other Snacks
Low/No/Reduced Lactose
Pasta
Economy
Ethical - Animal
Pastilles, Gums, Jellies & Chews
Refill/Refillable Refill/Refillable
Plant Based Drinks (Dairy Alternatives)
Added Calcium Added Calcium
Ethical - Sustainable (Habitat/Resources) Functional - Bone Health
Functional - Eye Health Functional - Cardiovascular
Low/No/Reduced Lactose Functional - Eye Health
Stanols/Sterols Functional - Immune System
Vitamin/Mineral Fortified

Table 1: Increased attributes in 2020 with respect to 2021 by product category (cont.)

(cont.)	
Based on shares	Based on number of products
Plant Based Ice Cream & Frozen Yogurt (Dair	
Ethical - Charity	
Plant Based Spoonable Yogurts (Dairy Altern	atives)
Added Calcium	
Low/No/Reduced Lactose	
Potato Snacks	
Premium	
Poultry Products	
Ethical - Animal	Economy Ethical - Animal Ethical - Environmentally Friendly Package Ethical - Recycling Limited Edition
Prepared Meals	
Low/No/Reduced Saturated Fat	Ethical - Animal Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Bone Health Functional - Cardiovascular Limited Edition Premium
Processed Cheese	
Convenient Packaging	
Low/No/Reduced Lactose	
Rice	
Convenient Packaging	
Salads Functional - Skin Nails & Hair	
Sandwich Fillers/Spreads	
Ethical - Animal	
Seasonal Chocolate	
	Ethical - Environmentally Friendly Package Ethical - Recycling Refill/Refillable
Shortening & Lard Economy Ethical - Animal	
Snack/Cereal/Energy Bars	
	Vitamin/Mineral Fortified
Soft Cheese Desserts	5 I B
Added Calcium Functional - Bone Health Vitamin/Mineral Fortified	Functional - Bone Health
Spoonable Yogurt	
	Functional - Bone Health Limited Edition Premium
Sports Drinks	
Functional - Other Vitamin/Mineral Fortified	Functional - Other

Table 1: Increased attributes in 2020 with respect to 2021 by product category (cont.)

Functional - Eye Health Sweet Biscuits/Cookies Economy Ethical - Environmentally Friendly Package Ethical - Recycling Premium Sweetened Condensed Milk Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Refill/Refillable Refill/Refillable Refill/Refillable Regeables Functional - Skin Microwaveable Nails & Hair Microwaveable Nails & Hair Limited Edition Nater Carbon Neutral Economy Carbon Neutral Economy Carbon Neutral Economy	(cont.)	
Functional - Eye Health Sweet Biscuits/Cookies Economy Ethical - Environmentally Friendly Package Ethical - Recycling Premium Sweetened Condensed Milk Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Fable Sauces Economy fea Diabetic Ethical - Environmentally Friendly Package Fethical - Environmentally Friendly Package Fequila Premium Toffees, Caramels & Nougat Refill/Refillable Refill/Refillable Refill/Refillable Refill/Refillable Functional - Skin Nails & Hair Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Based on shares	Based on number of products
Economy Ethical - Environmentally Friendly Package Ethical - Recycling Premium Sweetened Condensed Milk Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Table Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Tenctional - Skin Microwaveable Nails & Hair Functional - Skin Nails & Hair Fodka Limited Edition Nater Carbon Neutral Economy Functional - Weight & Muscle Gain Functional - Bone Health	Stuffing, Polenta & Other Side Dishes	
Economy Ethical - Environmentally Friendly Package Ethical - Recycling Premium Sweetened Condensed Milk Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Fremium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable / ogetables Functional - Skin Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair / odka Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health		Functional - Eye Health
Ethical - Environmentally Friendly Package Ethical - Recycling Premium Sweetened Condensed Milk Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Table Sauces Economy Tea Diabetic Ethical - Environmentally Friendly Package Fequila Premium Toffees, Caramels & Nougat Refill/Refillable Functional - Skin Microwaveable Nails & Hair Economy Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair Fodka Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Sweet Biscuits/Cookies	
Economy Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Femium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Skin Nails & Hair		Ethical - Environmentally Friendly Package Ethical - Recycling
Low/No/Reduced Saturated Fat Syrups Female Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Nails & Hair Functional - Skin Nails & Hair Fodka Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Sweetened Condensed Milk	
Female Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Fremium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Skin Nails & Hair Ethical - Recycling Functional - Skin Nails & Hair Carbon Neutral Economy Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health		
Female Low/No/Reduced Lactose Male Table Sauces Economy Tea Diabetic Ethical - Environmentally Friendly Package Tequila Premium Toffees, Caramels & Nougat Refill/Refillable Refill/Refillable Refill/Refillable Vegetables Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Toffees, Carbon Neutral Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Toffees, Carbon Neutral Economy Neter Carbon Neutral Economy Neter Soup Functional - Weight & Muscle Gain Functional - Bone Health		
Low/No/Reduced Lactose Male Fable Sauces Economy Fea Diabetic Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Functional - Skin Nails & Hair Carbon Neutral Economy Neter Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	•	
Male Table Sauces Economy Tea Diabetic Ethical - Environmentally Friendly Package Tequila Premium Toffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Todka Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health		
Fea Diabetic Ethical - Environmentally Friendly Package		
Fea Diabetic Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair Functional - Skin Sin Economy Microwaveable Limited Edition Nater Carbon Neutral Economy Vet Soup Functional - Bone Health Functional - Bone Health		
Diabetic Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Skin Nails & Hair	Table Sauces	Faanamy
Diabetic Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Functional - Skin Nails & Hair Carbon Neutral Economy Wet Soup Functional - Weight & Muscle Gain Functional - Bone Health	Top	Economy
Ethical - Environmentally Friendly Package Fequila Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Economy Microwaveable Ethical - Environmentally Friendly Package Nails & Hair Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair Fodka Limited Edition Limited Edition Nater Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	1 C a	Diabetic
Premium Foffees, Caramels & Nougat Refill/Refillable Refill/Refillable Functional - Skin Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair Functional - Skin Nails & Hair Carbon Neutral Economy Functional - Bone Health Functional - Bone Health		
Premium Toffees, Caramels & Nougat Refill/Refillable Refill/Refillable /egetables Functional - Skin Economy Microwaveable Ethical - Environmentally Friendly Package Nails & Hair Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition Limited Edition Nater Carbon Neutral Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Tequila	Zamedi Zintilerinieridany i neridiy i dendge
Refill/Refillable /egetables Functional - Skin Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition /vater Carbon Neutral Economy /vet Soup Functional - Bone Health Functional - Bone Health Functional - Bone Health Carbon Neutral - Bone Health	•	
Refill/Refillable /egetables Functional - Skin Microwaveable Nails & Hair Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition /vater Carbon Neutral Economy /vet Soup Functional - Bone Health Functional - Bone Health Functional - Bone Health	Toffees, Caramels & Nougat	
Functional - Skin Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition /vater Carbon Neutral Economy /vet Soup Functional - Weight & Muscle Gain Economy Functional - Bone Health		Refill/Refillable
Microwaveable Nails & Hair Ethical - Environmentally Friendly Package Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition Limited Edition /vater Carbon Neutral Economy /vet Soup Functional - Weight & Muscle Gain Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package Ethical - Environmentally Friendly Package	Vegetables	
Nails & Hair Ethical - Recycling Functional - Eye Health Functional - Skin Nails & Hair /odka Limited Edition Limited Edition /vater Carbon Neutral Economy /vet Soup Functional - Weight & Muscle Gain Ethical - Recycling Functional - Eye Health Functional - Eye Health Functional - Skin Nails & Hair Functional - Skin Nails & Hair Functional - Skin Nails & Hair Functional - Bone Health		
Vodka Limited Edition Vater Carbon Neutral Economy Vet Soup Functional - Weight & Muscle Gain Limited Edition Carbon Neutral Carbon Neutral Functional - Bone Health		Ethical - Recycling Functional - Eye Health Functional - Skin
Nater Carbon Neutral Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Vodka	
Carbon Neutral Economy Net Soup Functional - Weight & Muscle Gain Carbon Neutral Functional - Bone Health	Limited Edition	Limited Edition
Economy Net Soup Functional - Weight & Muscle Gain Functional - Bone Health	Water	
Wet Soup Functional - Weight & Muscle Gain Functional - Bone Health	Carbon Neutral	Carbon Neutral
Functional - Weight & Muscle Gain Functional - Bone Health	•	
	Wet Soup	
LOW/NO/Reduced Saturated Fat Functional - Cardiovascular	•	
		Functional - Cardiovascular
Ethical - Charity	Wheat & Other Grain-Based Snacks	
	White Milk	
Ethical - Animal Functional - Bone Health		Functional - Rone Health
Ethical - Environmentally Friendly Package		ranottorial Bone rication
Ethical - Recycling		
Ethical - Sustainable (Habitat/Resources)	· •	
Functional - Bone Health	· · · · · · · · · · · · · · · · · · ·	
Functional - Weight & Muscle Gain	Functional - Weight & Muscle Gain	
Low/No/Reduced Lactose	<u> </u>	
	White Rum	
Limited Edition	Limited Edition	

Table 1 shows that several categories reinforced in 2020 the number of products both including different ethical dimensions (e.g., animal products carried animal welfare attributes). The health attributes were also present in the form of functional attributes. These were particularly important on baby products.

V. Discussion

In order to explore a bit more the results, Tables 2 to 6 show a selection of product categories namely: cakes, pastries and sweet goods, chilled desserts, frozen desserts, potato snacks and prepared meals. The number in parenthesis is the correlation coefficient between 2019 and 2020 profiles. The choice of categories was due to their importance on the discussion of improving nutritionally products that are high in sugar, salt and saturated f ats. The tables compare those attributes present in the period 2018 and 2019 with those that were significantly increased in 2020 with particularly attributes.

Cakes, pastries and sweet goods shows a correlation coefficient of 0.98, which indicates a profile in 2020 very similar to 2019. In 2018-19 the number of attributes in their products were 60 including several ethical and health improving ones. However, in 2020 the firms significantly only increase products with two ethical attributes (one of them related to packaging).

The chilled desserts category showed a lower correlation that the previous case equal to 0.76. The firms used 44 attributes in 2018-19. Similar to the cakes, pastries and sweet goods products with two ethical attributes where increased in 2020 (again packaging).

The frozen dessert category showed a higher correlation (0.94) but they had less attributes in 2020 (32 attributes). None of the increment of products in 2020 brought a significant health or ethical attributes. The situation with potato snacks was similar to chilled desserts.

Prepared meals had a correlation of 0.94 and far more attributes as this is a more heterogeneous category. In terms of the products with attributes increase in 2020, it has several functional and ethical attributes.

Table 2 – Cakes, pastries and sweet goods (0.98)

Cakes, Pastries & Sweet Goods	ŭ .				
Claims present 2018-19					
All Natural Product	Children (5-12)	Cobranded	Convenient Packaging	Dairy Free	Ease of Use
Economy	Ethical - Animal	Ethical - Biodegradable	Ethical - Environmentally Friendly Package	Ethical - Environmentally Friendly Product	Ethical - Human
Ethical - Recycling	Ethical - Sustainable (Habitat/Resources)	Event Merchandising	Female	Free from Added/Artificial Additives	Free from Added/Artificial Colourings
Free from Added/Artificial Flavourings	Free from Added/Artificial Preservatives	Functional - Digestive	Functional - Energy	Functional - Slimming	Gluten Free
GMO Free	Halal	High/Added Fibre	High/Added Protein	Kosher	Limited Edition
Low/No/Reduced Allergen	Low/No/Reduced Fat	Low/No/Reduced Lactose	Low/No/Reduced Saturated Fat	Low/No/Reduced Transfat	Low/Reduced Sugar
Male	Microwaveable	No Added Sugar	No Additives/Preservatives	On-the-Go	Organic
Palm Oil Free	Plant Based	Prebiotic	Premium	Seasonal	Social Media
Time/Speed	Vegan/No Animal Ingredients	Vegetarian	Wholegrain	Diet/Light	Ethical - Charity
High Satiety	Interesting Packaging	Low/No/Reduced Calorie	Low/No/Reduced Glycemic	Portionability	Sugar Free
Claims increased after COVID					
Using shares	Using products				
	Ethical - Environmentally Friendly Package				
	Ethical - Recycling				
	Limited Edition				

Table 3 – Chilled desserts (0.76)

Chilled Desserts						
Claims present 2018-19						
All Natural Product	Cobranded	Dairy Free	Diet/Light	Ease of Use	Economy	
Ethical - Biodegradable	Ethical - Charity	Ethical - Environmentally Friendly Package	Ethical - Environmentally Friendly Product	Ethical - Human	Ethical - Recycling	
Ethical - Sustainable (Habitat/Resources)	Event Merchandising	Free from Added/Artificial Additives	Free from Added/Artificial Colourings	Free from Added/Artificial Flavourings	Free from Added/Artificial Preservatives	
Functional - Energy	Gluten Free	GMO Free	Kosher	Limited Edition	Low/No/Reduced Allergen	
Low/No/Reduced Fat	Low/No/Reduced Lactose	Low/No/Reduced Transfat	Low/Reduced Sugar	Microwaveable	No Additives/Preservatives	
Organic	Plant Based	Premium	Seasonal	Social Media	Vegan/No Animal Ingredients	
Vegetarian	Wholegrain	Ethical - Animal	Functional - Cardiovascular	High/Added Protein	Low/No/Reduced Calorie	
No Added Sugar	On-the-Go					
Claims increased after COVID						
Using shares	Using products					
	Ethical - Environmentally Friendly Package					
	Ethical - Recycling					

Table 4 – Frozen desserts (0.94)

Frozen Desserts					
Claims present 2018-19					
Diet/Light	Ease of Use	Ethical - Environmentally Friendly Package	Ethical - Recycling	Ethical - Sustainable (Habitat/Resources)	Free from Added/Artificial Colourings
Free from Added/Artificial Flavourings	Free from Added/Artificial Preservatives	Gluten Free	Low/No/Reduced Allergen	Low/No/Reduced Fat	Low/No/Reduced Transfat
Microwaveable	No Additives/Preservatives	Palm Oil Free	Premium	Seasonal	Social Media
Time/Speed	Vegan/No Animal Ingredients	Vegetarian	Children (5-12)	Dairy Free	Ethical - Animal
Ethical - Environmentally Friendly Product	Ethical - Human	Event Merchandising	Female	GMO Free	Limited Edition
Low/No/Reduced Cholesterol	Male				
Claims increased after COVID					
Using shares	Using products				
Limited Edition	Limited Edition				
Premium					

Table 5 – Potato snacks (0.88)

Potato Snacks					
Claims present 2018-19					
All Natural Product	Ethical - Environmentally Friendly Package	Convenient Packaging	Diet/Light	Economy	Cobranded
Ethical - Human	Ethical - Environmentally Friendly Product	Ethical - Recycling	Ethical - Sustainable (Habitat/Resources)	Event Merchandising	Free from Added/Artificial Additives
Free from Added/Artificial Colourings	Free from Added/Artificial Flavourings	Free from Added/Artificial Preservatives	Gluten Free	GMO Free	Kosher
Limited Edition	Low/No/Reduced Allergen	Low/No/Reduced Cholesterol	Low/No/Reduced Fat	Low/No/Reduced Lactose	Low/No/Reduced Saturated Fat
Low/No/Reduced Sodium	Low/No/Reduced Transfat	No Added Sugar	No Additives/Preservatives	Palm Oil Free	Premium
Seasonal	Social Media	Vegan/No Animal Ingredients	Vegetarian	Children (5-12)	Dairy Free
Ease of Use	Ethical - Animal	Ethical - Biodegradable	Ethical - Charity	Halal	Low/No/Reduced Calorie
On-the-Go	Portionability				
Claims increased after COVID					
Using shares	Using products				
Premium					

Table 6 – Prepared meals (0.94)

Prepared Meals					
Claims present 2018-19					
All Natural Product	Carbon Neutral	Children (5-12)	Cobranded	Convenient Packaging	Dairy Free
Diet/Light	Ease of Use	Economy	Ethical - Animal	Ethical - Biodegradable	Ethical - Charity
Ethical - Environmentally Friendly Package	Ethical - Environmentally Friendly Product	Ethical - Human	Ethical - Recycling	Ethical - Sustainable (Habitat/Resources)	Ethical - Toxins Free
Free from Added/Artificial Additives	Free from Added/Artificial Colourings	Free from Added/Artificial Flavourings	Free from Added/Artificial Preservatives	Functional - Bone Health	Functional - Brain & Nervous System
Functional - Cardiovascular	Functional - Digestive	Functional - Energy	Functional - Immune System	Functional - Other	Functional - Slimming
Functional - Weight & Muscle Gain	Gluten Free	GMO Free	Halal	High Satiety	High/Added Fibre
High/Added Protein	Hormone Free	Kosher	Low/No/Reduced Allergen	Low/No/Reduced Calorie	Low/No/Reduced Fat
Low/No/Reduced Saturated Fat	Low/No/Reduced Sodium	Low/No/Reduced Transfat	Low/Reduced Sugar	Microwaveable	No Added Sugar
No Additives/Preservatives	On-the-Go	Organic	Palm Oil Free	Plant Based	Premium
Seasonal	Social Media	Time/Speed	Vegan/No Animal Ingredients	Vegetarian	Vitamin/Mineral Fortified
Wholegrain	Antioxidant	Babies & Toddlers (0-4)	Female	Functional - Eye Health	Limited Edition
Low/No/Reduced Glycemic	Male				
Claims increased after COVID					
Using shares	Using products				
Low/No/Reduced Saturated Fat	Ethical - Animal				
	Ethical - Environmentally Friendly Package				
	Ethical - Recycling				
	Functional - Bone Health				
	Functional - Cardiovascular				
	Limited Edition				
	Premium				

VI. Conclusions

The new product development continued during the lockdown with firms trying to capture the attention of consumers. The preliminary results show that for about 70 per cent of the product categories the similarities of the profiles in 2019 and 2020 were very high (e.g., correlation coefficients above 90 per cent).

The analysis of the dynamics of attributes indicated that when comparing 2019 and 2020 (considering the period March to December), health and nutrition attributes where the ones with the higher movements (attributes that left, remain and new), followed by ethical products (e.g., environmental packaging).

The results indicate that the new product launched during the COVID-19 period lockdown in 2020 kept growing as firms were trying to capture the attention of consumers; this happened despite the disruptions on food supply chains due to the pandemic.

The most popular attributes within the products launched after March 2020 were the health and nutrition attributes (functionals), showing that firms may have been reacting to consumers interest during the lockdown. However, it should be noted that this trend was a continuation from previous paths and not a change due to the pandemic.

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Annex Table A1: Number of launched products by sub-category 2019-21

New New New New Relaunch Total Formulation packeding protein variety variety	Table A1: Number of launched products by st					
Cakes. Pastries & Sweet Goods				New	New	Relaunch Total
Cakes. Pastries & Sweet Goods		formulation pa	ckaging p	roduct		
Cakes, Pastries & Sweel Goods 4 284 112 502 100 1002 Meal Products 9 223 90 300 83 765 Sweet DiscutisCookies 3 228 121 300 70 72 Fish Products 1 167 72 31 190 30 80 80 70 72 73 73 72 73 73 73 72 73 73 73 73 73 73 73 73 73 73 73 73 73 73 73 73 73 74 74 72 74 74 <td></td> <td></td> <td></td> <td></td> <td>•</td> <td></td>					•	
Prepared Meals	Cakes Pastries & Sweet Goods	1	201			
Meal Products		22				
Sweet Biscuits/Cookies 3 228 121 300 70 722 726 75 77 75 75 75 75 75 7						
Snack/Cereal/Energy Bars 10 156 221 266 59 712						
Fish Products						
Seasonal Chocolate 1 194 52 348 30 25 Vegletables 6 134 54 323 38 80 Vegletables 0 174 56 271 78 57 777 78 577 787 78 577 787 787 787 787 787 787 787 787 787 78 787 787 787 787 787 787 787 787 787 787 787 787 787 787 787 780 787 782 787 780 787 780 782 782 787 780 782 <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td></t<>						
Vegetables 0						
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Beer	Bread & Bread Products	14	161	78	257	67 577
Bakina Ingredients & Mixes 4 132 96 240 40 51 50 Coffee 3 138 68 241 53 50 Wine 0 43 248 179 0 470 Nutritional & Meal Replacement Drinks 16 65 201 142 36 451 Hard Cheese 2 190 31 157 44 420 Chocolate Tablets 0 111 82 199 14 40 Chocolate Tablets 1 99 91 147 23 861 Table Sauces 1 99 91 147 23 861 Chilled Desserts 1 199 91 147 23 861 Cold Cereals 3 113 48 49 19 91 147 23 861 Cold Cereals 3 38 115 47 26 84 19 91 147	Seasonings	1	169	75	280	47 572
Coffee 3 138 68 241 53 503 Wine 0 43 248 241 9 0 470 Nutritional & Meal Replacement Drinks 16 56 201 142 36 451 1 180 36 451 1 180 36 451 1 90 31 157 44 424 142 182 189 13 157 44 424 120 182 189 11 199 91 14 406 206 68 141 140 40 141 40 40 141 41 43 146 50 357 50 <t< td=""><td>Beer</td><td>0</td><td>280</td><td>93</td><td>146</td><td>29 548</td></t<>	Beer	0	280	93	146	29 548
Wine 0						
Nutritional & Meal Replacement Drinks 16 56 201 142 36 451 Tea			138	68		
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Hard Cheese & Semi-Hard Cheese 2 190 31 157 44 424 44 424 42 42 42						
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Table Sauces			-			
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Cold Cereals Spoonable Yogurt 4 105 47 129 66 357 Carbonated Soft Drinks 3 159 58 110 19 349 Pickled Condiments 4 72 66 16 176 26 344 Hors do euvres & canapes 4 56 64 161 54 339 Non-Individually Wrapped Chocolate Pieces 1 89 79 148 1331 Nats Non-Individually Wrapped Chocolate Pieces 1 89 79 148 1331 Nats Cooking Sauces 6 81 60 148 29 327 Cooking Sauces 6 81 60 148 29 327 Rastilles, Gurns, Jellies & Chews 7 129 62 135 36 110 22 305 Pizzas Pastilles, Gurns, Jellies & Chews 8 1 10 22 305 Pizzas 9 37 158 26 285 Potato Snacks 9 11 110 24 94 28 257 Rice 9 11 110 24 94 28 257 Rice 1 1 10 24 94 28 257 Rice 1 1 10 24 94 28 257 Rice 1 1 10 24 94 28 257 Rice 2 60 54 98 33 251 Stuffing, Polenta & Other Side Dishes 2 60 54 98 33 251 Stuffing, Polenta & Souch Elsews 1 70 13 18 60 251 Wet Soup Potato Snacks 1 70 31 86 21 209 Dressings & Vinegar Olis Roury Biscuits/Crackers 1 70 31 86 21 209 Dressings & Vinegar Olis Sandwiches/Wraps 3 46 45 73 17 199 Soft Cheese & Semi-Soft Cheese 1 1 70 31 86 21 209 Dressings & Vinegar Olis Sandwiches/Wraps 3 27 7 101 34 192 Soft Cheese & Semi-Soft Cheese 1 1 42 47 99 175 Corn-Based Snacks 1 1 70 31 86 21 209 Dressings & Vinegar Olis Sandwiches/Wraps 3 27 26 68 68 68 68 68 68 68 68 68 68 68 68 68						
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Stuffing, Polenta & Other Side Dishes 2 60 54 98 37 251 Wet Soup 3 60 35 113 40 251 Potato Products 3 104 34 72 33 246 Savoury Biscuits/Crackers 2 60 42 108 33 245 Fruit 0 57 24 122 22 228 Pasta Sauces 1 76 35 80 24 216 Fruit Snacks 3 27 27 101 34 192 Soft Cheese & Semi-Soft Cheese 0 65 35 76 16			-		-	
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Potato Products 3 104 34 72 33 246						
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Fruit Snacks 1 70 31 86 21 209 Dressings & Vinegar 3 46 43 87 27 206 Oils 0 64 45 73 17 199 Sandwiches/Wraps 3 27 27 101 34 192 Soft Cheese & Semi-Soft Cheese 0 65 35 76 16 192 Flavoured Alcoholic Beverages 0 44 65 68 8 185 Plant Based Drinks (Dairy Alternatives) 0 61 45 56 15 177 Confiture & Fruit Spreads 1 42 34 79 19 175 Confiture & Fruit Spreads 1 42 34 79 19 175 Confiture & Fruit Spreads 0 65 24 61 12 162 Gin 0 11 42 34 79 19 175 Confiture & Fruit Spreads 0 65 24 61 12 162 Gin 0		ĺ	_			
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Soft Cheese & Semi-Soft Cheese 0 65 35 76 16 192 Flavoured Alcoholic Beverages 0 44 65 68 8 185 Plant Based Drinks (Dairy Alternatives) 0 61 45 56 15 177 Corn-Based Snacks 0 65 24 61 12 162 Gin 0 11 59 74 5 149 Snack Mixes 0 26 37 73 8 144 Eggs & Egg Products 2 66 26 28 18 140 Honey 0 46 25 54 13 138 Dips 0 34 20 58 21 133 Hot Cereals 1 37 26 57 12 133 Flavoured Water 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Salads 2 21 24 58 17 1		0	64	45	73	17 199
Flavoured Alcoholic Beverages Plant Based Drinks (Dairy Alternatives) O 61 45 56 15 177 Confiture & Fruit Spreads 1 42 34 79 19 175 Corn-Based Snacks O 65 24 61 12 162 Gin O 11 59 74 5 149 Snack Mixes O 26 37 73 8 144 Eggs & Egg Products O 46 25 54 13 138 Dips Hot Cereals Hot Cereals Hot Cereals Flavoured Water O 34 20 58 21 133 Flavoured Water O 38 42 43 9 132 Meal Kits O 31 32 60 8 131 Shelf-Stable Desserts O 52 18 40 15 125 Salads Nut Spreads O 42 29 36 10 117 Chocolate Countlines O 72 8 33 3 116 Wheat & Other Grain-Based Snacks Frozen Desserts O 17 14 75 4 110 Clider O 46 13 39 7 105 Individually Wrapped Chocolate Pieces	Sandwiches/Wraps	3	27	27	101	34 192
Flavoured Alcoholic Beverages Plant Based Drinks (Dairy Alternatives) O 61 45 56 15 177 Confiture & Fruit Spreads 1 42 34 79 19 175 Corn-Based Snacks O 65 24 61 12 162 Gin O 11 59 74 5 149 Snack Mixes O 26 37 73 8 144 Eggs & Egg Products O 46 25 54 13 138 Dips Hot Cereals Hot Cereals Hot Cereals Flavoured Water O 34 20 58 21 133 Flavoured Water O 38 42 43 9 132 Meal Kits O 31 32 60 8 131 Shelf-Stable Desserts O 52 18 40 15 125 Salads Nut Spreads O 42 29 36 10 117 Chocolate Countlines O 72 8 33 3 116 Wheat & Other Grain-Based Snacks Frozen Desserts O 17 14 75 4 110 Clider O 46 13 39 7 105 Individually Wrapped Chocolate Pieces		0	65	35	76	16 192
Confiture & Fruit Spreads 1 42 34 79 19 175 Corn-Based Snacks 0 65 24 61 12 162 Gin 0 11 59 74 5 149 Snack Mixes 0 26 37 73 8 144 Eggs & Egg Products 2 66 26 28 18 144 Honey 0 46 25 54 13 138 Dips 0 34 20 58 21 133 Hot Cereals 1 37 26 57 12 133 Hot Cereals 1 37 26 57 12 133 Hot Cereals 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Meal Kits 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Nut Spreads	Flavoured Alcoholic Beverages	0	44	65	68	8 185
Corn-Based Snacks 0 65 24 61 12 162 Gin 0 11 59 74 5 149 Snack Mixes 0 26 37 73 8 144 Eggs & Egg Products 2 66 26 28 18 140 Honey 0 46 25 54 13 138 Dips 0 34 20 58 21 133 Hot Cereals 1 37 26 57 12 133 Flavoured Water 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Shelf-Stable Desserts 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Nut Spreads 2 21 24 58 17 122 Nut Spreads 0 72 8 33 3 116 Wheat & Other Grain	Plant Based Drinks (Dairy Alternatives)	0	61	45	56	15 177
Gin 0 11 59 74 5 149 Snack Mixes 0 26 37 73 8 144 Eggs & Egg Products 2 66 26 28 18 140 Honey 0 46 25 54 13 138 Dips 0 34 20 58 21 133 Hot Cereals 1 37 26 57 12 133 Flavoured Water 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Shelf-Stable Desserts 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Nut Spreads 0 42 29 36 10 117 Chocolate Countlines 0 72 8 33 3 116 Wheat & Other Grain-Based Snacks 1 22 31 53 5 112		1	42		79	19 175
Snack Mixes 0 26 37 73 8 144 Eggs & Egg Products 2 66 26 28 18 140 Honey 0 46 25 54 13 138 Dips 0 34 20 58 21 133 Hot Cereals 1 37 26 57 12 133 Hot Cereals 0 38 42 43 9 132 Flavoured Water 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Shelf-Stable Desserts 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Salads 2 21 24 58 17 122 Nut Spreads 0 42 29 36 10 117 Chocolate Countlines 0 72 8 33 3 116 Wheat & Other						
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Flavoured Water 0 38 42 43 9 132 Meal Kits 0 31 32 60 8 131 Shelf-Stable Desserts 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Nut Spreads 0 42 29 36 10 117 Chocolate Countlines 0 72 8 33 3 116 Wheat & Other Grain-Based Snacks 1 22 31 53 5 112 Frozen Desserts 0 17 14 75 4 110 Cider 0 46 13 39 7 105 Individually Wrapped Chocolate Pieces 0 38 21 38 6 103			_			
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Shelf-Stable Desserts 0 52 18 40 15 125 Salads 2 21 24 58 17 122 Nut Spreads 0 42 29 36 10 117 Chocolate Countlines 0 72 8 33 3 116 Wheat & Other Grain-Based Snacks 1 22 31 53 5 112 Frozen Desserts 0 17 14 75 4 110 Cider 0 46 13 39 7 105 Individually Wrapped Chocolate Pieces 0 38 21 38 6 103					_	
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Frozen Desserts 0 17 14 75 4 110 Cider 0 46 13 39 7 105 Individually Wrapped Chocolate Pieces 0 38 21 38 6 103				_		
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Individually Wrapped Chocolate Pieces 0 38 21 38 6 103						
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<u>III STAIL LIVOURES</u> 0 30 31 28 8 103						
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Table A1: Number of launched products by sub-category (cont.)

New New New New Relaunch Total Formulation packeding protection packeding protection packeding protection packeding protection packeding packe	Table A1: Number of launched products by su	ub-category	(cont.))			
Meat Snacks Meat S						Relaunch	Total
Meat Snacks		formulation pac	kaging p	roduct	•		
Meal Snacks							
Mayonnaise	Most Casalia		40				400
Beverage Concentrates							
FruilFriavoured Still Drinks Malta Chirer hot Beverages 0 34 29 28 6 97 Processed Cheese 0 22 21 45 5 93 Processed Cheese 0 22 21 45 5 93 Rombucha & Other Fermented Drinks 0 14 40 33 4 8 9 8 8 8 8 8 8 9 8 9 9 9 9 9 9 9 9 9							
Malt & Other Hot Beverages							
Processed Cheese		-	-				
Baby Savoury Meals & Dishes Kombucha & Other Fermented Drinks 0 14 40 33 90 Water 0 70 10 4 6 3 89 Water 0 70 10 4 6 93 99 Water 1 14 37 36 1 88 Vecetable Snacks 0 17 34 32 4 87 Vecetable Snacks 0 17 34 32 4 87 Vecetable Snacks 1 2 29 9 7 29 12 81 Vecetable Snacks 1 2 29 9 9 29 12 81 Vecetable Snacks 1 16 21 21 14 73 RTD (Iceal Coffee 1 2 30 20 19 9 8 80 Vecetable Snacks 1 16 21 21 14 73 RTD (Iceal Coffee Snacks) 1 16 21 21 14 73 RTD (Iceal Coffee Snacks) 1 16 21 21 14 73 RTD (Iceal Snacks) 1 17 22 15 24 13 64 Water Flastes & Pates 1 18 20 39 4 81 Vecetable Snacks 1 16 21 21 14 73 RTD (Iceal Coffee Snacks) 1 18 20 39 1 2 70 Vecetable Snacks 1 18 20 39 1 2 81 Vecetable Snacks 1 19 1 2 5 24 13 64 Vecetable Snacks 1 19 1 2 5 24 13 64 Vecetable Snacks 1 10 13 1 17 2 6 60 Vecetable Snacks 1 10 13 1 17 2 60 Vecetable Snacks 1 10 13 1 17 2 60 Vecetable Snacks 1 10 13 1 17 2 60 Vecetable Snacks 1 10 13 1 17 2 60 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 10 10 31 17 21 2 59 Vecetable Snacks 1 17 13 17 2 60 Vecetable Snacks 1 17 13 17 2 60 Vecetable Snacks 1 17 13 19 15 50 Vecetable Snacks 1 10 17 13 19 15 50 Vecetable Snacks 1 10 17 13 19 15 50 Vecetable Snacks 1 10 17 13 19 15 50 Vecetable Snacks 1 10 11 13 15 4 4 Vecetable Snacks 1 10 11 1 18 1 19 1 10 10 10 10 10 10 10 10 10 10 10 10 1							
Kombucha & Other Fermented Drinks							
Water		-	_		_		
Liqueur				-			
Vegetable Snacks						-	
Energy Drinks		-					
Nectairs 1 31 17 23 12 84 Tofflees, Caramels & Nougat 0 18 20 39 4 81 Tofflees, Caramels & Nougat 0 18 20 39 4 81 Topcorn 2 30 20 19 9 8 Drinking Yogurt & Liquid Cultured Milk 1 16 21 21 14 73 TTD (Iced) Coffee 0 29 20 19 2 70 Marshmallows 0 19 18 26 1 64 Meat Pastes & Pates 0 12 15 24 13 64 Noodles 0 17 15 20 11 63 Bean-Based Snacks 0 17 15 20 11 63 Bean-Based Snacks 0 10 31 17 2 69 Rice Snacks 0 10 31 17 2 69 Rice Snacks 0 10 31 17 2 69 Rice Snacks 0 10 31 4 15 9 Rice Snacks 0 10 10 11 1 1 1 1 Rice Snacks 0 10 10 11 1 1 1 1 Rice Snacks 0 10 10 11 1 1 1 1 Rice Snacks 0 10 10 11 1 1 1 1 1							-
Stocks							
Toffees, Caramels & Nougat Popcorn Popcorn 2 30 20 19 9 8 80 Drinking Yogurt & Liquid Cultured Milk 1 1 16 21 21 14 73 RTD (Iced) Coffee 0 29 20 19 2 70 Marshmallows 0 19 18 26 19 2 70 Marshmallows 0 19 19 18 26 19 2 70 Marshmallows 0 10 19 18 26 19 19 28 Marshmallows 0 10 19 18 26 19 19 28 Marshmallows 0 10 19 18 26 19 19 28 Marshmallows 0 10 19 18 26 19 19 28 Marshmallows 0 10 13 1 17 2 10 20 Marshmallows 0 19 19 18 26 19 19 28 Marshmallows 0 19 19 18 26 19 19 28 Marshmallows 0 19 19 18 26 19 19 28 Marshmallows 0 19 19 18 26 19 19 28 Marshmallows 0 19 19 18 26 19 19 20 Marshmallows 0 19 19 19 19 19 19 19 19 19 19 19 19 19			-				-
Popcorn			-	-	-		-
Drinking Yogun' & Liquid Cultured Milik							
RTD (Iced) Coffee							
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Other Baby Food 0 3 7 2 0 12		-		-	-	-	
<u>Baby Biscuits & Rusks</u> 0 0 0 4 7 11							
	Baby Biscuits & Rusks	0	0	0	4	7	11

Table A1: Number of launched products by sub-category (cont.)

Table 7 th Hamber of Table 10 products by Ca	is carego.) (00	·· <i>/</i>			
	New	New	New	New	Relaunch	Total
	formulation p	ackaging	product	variety		
				range		
	extension					
Other Spirits	0	1	8	1	0	10
Shortening & Lard	0	5	1	1	2	9
Sticks, Liquids & Sprays	0	3	3	3	0	9
Mixed Assortments	0	3	1	2	2	8
Other Chocolate Confectionery	0	1	2	5	0	8
Sweetened Condensed Milk	0	4	0	1	3	8
White Rum	0	3	4	1	0	8
Tequila	0	1	4	2	0	7
Evaporated Milk	0	2	0	0	4	6
Lollipops	0	0	3	3	0	6
Baby Juices & Drinks	0	1	3	0	0	4
Brandy	0	1	1	2	0	4
Creamers	0	2	1	1	0	4
Yeast Extracts	0	3	0	0	1	4
Liquid Dairy Other	0	0	0	0	0	0

Source: Own elaboration based Mintel's GNPD data

Table A2: Comparison of attribute profiles by year and product sub-category

Table A2: Comparison of a	ıttırıbu	ute p	orom	es by year and product su	b-cat	ego	ry
	Fisher					correl	
	2018						2019
	and	and	and		and	and	and
0.11	2019			B 0 1 1		2020	2020
Coffee Pastry Dishes	0.91 0.97	0.92 0.97	0.99 0.98	Beverage Concentrates Nectars	0.84 0.73	0.57 0.88	0.71 0.70
Cakes, Pastries & Sweet Goods	0.99	0.98		Curd & Quark	0.73	0.42	0.70
Pastilles, Gums, Jellies & Chews	0.87	0.89		Dairy Based Ice Cream & Frozen Yogurt	0.91	0.77	0.69
Hors d oeuvres & canapes	0.93	0.88		Savoury Biscuits/Crackers	0.75	0.92	0.69
Hard Cheese & Semi-Hard Cheese	0.97	0.96	0.97	Kombucha & Other Fermented Drinks	0.47	0.43	0.69
Bread & Bread Products	0.95	0.91	0.97	Seasonings	0.82	0.44	0.69
Seasonal Chocolate	0.98	0.98		Malt & Other Hot Beverages	0.84	0.39	0.68
Pizzas	0.94			Toffees, Caramels & Nougat	0.94	0.78	0.68
Soft Cheese & Semi-Soft Cheese Tea	0.84 0.97	0.81 0.95		Energy Drinks Meal Kits	0.89 0.88	0.79 0.81	0.68 0.66
Dips	0.92			Baby Savoury Meals & Dishes	0.72	0.86	0.66
Chocolate Tablets	0.92	0.91		Fruit Snacks	0.72	0.75	0.66
Sweet Biscuits/Cookies	0.97	0.95		Stocks	0.46	0.78	0.66
Poultry Products	0.96	0.89		Fresh Cheese & Cream Cheese	0.65	0.61	0.64
Dressings & Vinegar	0.95	0.90	0.95	Shelf-Stable Desserts	0.74	0.86	0.62
Individually Wrapped Chocolate Pieces	0.91	0.90		Flavoured Milk	0.88	0.64	0.62
Nutritional & Meal Replacement Drinks	0.91	0.91		Dry Soup	0.41	0.74	0.61
Pickled Condiments	0.89	0.85		Liquorice	0.18	0.06	0.60
Rice White Milk	0.94 0.92	0.95 0.91		Sports Drinks RTD (Iced) Coffee	0.69 0.61	0.34 0.86	0.60 0.58
Prepared Meals	0.98	0.98		Baby Fruit Products, Desserts & Yogurts	0.59	0.94	0.54
Vegetables	0.92			Chocolate Spreads	0.50	0.91	0.53
Confiture & Fruit Spreads	0.87	0.90		Meat Pastes & Pates	0.56	0.72	0.50
Table Sauces	0.78	0.77	0.94	Liqueur	0.52	0.93	0.49
Fish Products	0.97	0.87	0.94	Syrups	0.32	0.39	0.48
Frozen Desserts	0.86	0.91		Rice Snacks	0.78	0.36	0.48
Gin	0.87	0.88		Wheat & Other Grain-Based Snacks	0.85	0.67	0.47
Wet Soup	0.97			Sweetened Condensed Milk Bean-Based Snacks	-0.67		0.46 0.45
Eggs & Egg Products Cold Cereals	0.93 0.95	0.95 0.93		Other Natural Sweeteners	0.88 0.70	0.55 0.35	0.45
Meat Products	0.95		0.93	Evaporated Milk	-0.89		0.44
Pasta	0.91	0.82		Caramel & Cream Spreads	0.05	0.50	0.42
Salads	0.88	0.92		Meat Snacks	0.63	0.76	0.40
Sandwiches/Wraps	0.95	0.96	0.93	Dessert Toppings	0.57	0.54	0.40
Beer	0.98	0.87		Baby Cereals	0.63	0.65	0.40
Potato Products	0.92			Gum	0.33	0.75	0.38
Carbonated Soft Drinks	0.88	0.97		Vegetable Snacks	0.63	0.50	0.38
Pasta Sauces Fruit	0.87 0.92		0.92 0.92	Other Snacks Standard & Power Mints	0.08 0.64	-0.06 0.70	0.38 0.35
Cider	0.89	0.80		Instant Rice	-0.30	0.70	0.35
Flavoured Alcoholic Beverages	0.60	0.60		Vodka	0.49	0.36	0.32
Stuffing, Polenta & Other Side Dishes	0.80	0.87		Other Sugar Confectionery	0.43	0.34	0.31
Snack Mixes	0.79	0.88	0.90	Medicated Confectionery	0.34	0.21	0.28
Meat Substitutes	0.59	0.76		Sucrose	0.24	0.11	0.27
Wine		0.66		Other Sauces & Seasonings	-0.14	0.41	0.22
Flavoured Water	0.84	0.89		Noodles	0.50	0.36	0.18
Hot Cereals Cooking Sauces	0.92 0.94	0.91 0.96		Instant Pasta Soft Cheese Desserts	0.60 0.41	0.68 0.16	0.17 0.17
Potato Snacks	0.94	0.90		Dark Rum	0.30	-0.11	0.17
Spoonable Yogurt	0.96	0.89		Baby Formula (6-12 months)	0.63	0.50	0.14
Processed Cheese	0.91	0.91	0.88	Baby Formula (0-6 months)	0.57	0.45	0.14
Fruit/Flavoured Still Drinks	0.89	0.81	0.87	Boiled Sweets	0.19	0.20	0.13
Baby Snacks	0.85	0.87		Savoury Vegetable Pastes/Spreads	0.42	0.56	0.12
Nut Spreads	0.88	0.80		Growing Up Milk (1-4 years)	0.50	0.34	0.02
Nuts Water	0.84 0.90	0.77 0.92		Baby Biscuits & Rusks RTD (Iced) Tea	0.14	0.23	0.01 -0.08
Popcorn	0.76			Other Baby Food			-0.08
Cream	0.83	0.66		Fortified & Other Wines	0.07		-0.14
Water Based Ice Lollies, Pops & Sorbets	0.77	0.85		Whisky			-0.15
Mayonnaise	0.84	0.71	0.83	Shortening & Lard	-0.33	-0.30	-0.23
Baking Ingredients & Mixes	0.97		0.83	Beverage Mixes			-0.24
Juice	0.92			Brandy			-0.25
Butter	0.65			Sticks, Liquids & Sprays			-0.29
Instant Noodles	0.72 0.90			Cassava & Other Root-Based Snacks Mixed Assortments			-0.34 -0.36
Honey Corn-Based Snacks	0.90			Sandwich Fillers/Spreads	-0.06		-0.37
Drinking Yogurt & Liquid Cultured Milk		0.73		Lollipops			-0.39
Chocolate Countlines		0.52		Artificial Sweeteners			-0.59
Plant Based Drinks (Dairy Alternatives)		0.93		White Rum			-0.64
Oils			0.77	Baby Juices & Drinks	-0.70		-0.70
Snack/Cereal/Energy Bars		0.91		Other Chocolate Confectionery			-0.83
Non-Individually Wrapped Chocolate Pieces		0.77		Creamers		-1.00	-0.89
Plant Based Spoonable Yogurts		0.76		Other Spirits	-1.00	0.40	-1.00
Chilled Desserts Marshmallows	0.97 0.49			Tequila Yeast Extracts			-1.00 -1.00
Plant Based Ice Cream & Frozen Yogurt			0.76	Liquid Dairy Other		-1.00	1.00
Margarine & Other Blends			0.74		1.00		
0 0 1 1 0 1		1 8 4	4 11				

Source: Own elaboration based Mintel's GNPD data