

Preference, Future Thoughts and Directions Regarding Home Meal Replacement

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Abstract

To be used in new product development, perceptions, future thoughts and directions for home meal replacement were investigated. The subjects of this study were Koreans in their teens to 70's or older, and a survey was conducted regardless of the region. Owing to Korea's advanced food delivery system, it was expected that many people would choose delivery food when dining alone. However, contrary to expectations, 44.4% of the respondents chose HMR. Delivery food accounted for 32.4%, and instant food accounted for 13.3%. The meal kit showed the lowest value of 9.9%. As a result, the most desired HMR was identified as a product that could learn simple cooking.

Keywords: Home meal replacement; Instant food; Delivery food; Meal kit; Home-cooked meal

Introduction

Recently as the number of people who eat alone increases with an increase in one- or two-person households, the instant and Home Meal Replacement (HMR) markets are growing significantly [1]. The Ministry of Food and Drug Safety of Korea classifies HMRs as ready to eat, ready to heat, and fresh convenience foods [2]. Ready to eat food refers to food that can be consumed as it is without further heating or cooking, and ready to heat food refers to food that is consumed through simple heating or an equivalent method. Fresh convenience food refers to raw food that is consumed. In Korea, ready to eat foods that can be consumed within 1.5 weeks and ready to heat foods that can be consumed from 1.5 weeks to 1.5 years are distributed in a refrigerated or frozen state [3].

The retail distribution of HMRs in Korea is conducted in large marts, convenience stores, and chain supermarkets. At marts, frozen products, retort products, instant rice, meat, stew, porridge and soups are sold in order, and at convenience stores, lunch boxes, gimbap, hamburgers, and sandwiches are sold in that order. To meet the needs of various consumers, not only the development of small packaging and HMR products for single use, but also the handling items are on the rise. According to the industry, both instant food and HMR sales growth rates at major convenience stores and open markets have more than doubled. It was found that the biggest driving force is the change in the demographic structure, where marriages are delayed, and the number of dual-income couples has increased [4]. In particular, the number of people who enjoy home-cooked meals has increased since the COVID-19 pandemic. People who eat home-cooked meals want meals that can be easily prepared, and an increasing number of single-person households are seeking convenient meals. This phenomenon is not unique to Korea. The number of people

seeking simple meals is increasing, regardless of country such as Japan, the United States. The HMR market, which can be easily cooked and eaten, is growing [5]. It is also predicted that the global market for HMR the next year will reach a whopping \$189.1 billion [6]. The Korean market is expected to reach \$2,518.4 million in 2018 and \$3,933.5 million in 2022, according to the Ministry of Agriculture, Food and Rural Affairs. As the global HMR market grows, competition for HMR development is fierce worldwide. Development competition is led by Japan, the United States, and Korea. As a result of researching overseas markets, it was confirmed that various types of HMRs were not developed as in Korea. There are basically known gimbal, bread, hamburgers, pizza, ramen, battle-food, etc., and there are few products that could be considered special. Instead, special HMRs are produced and sold by companies that have entered the Korean market. In this study, consumer perception, future thoughts, and directions were selected as the three themes of HMR, and a survey was conducted [7,8].

Materials and Methods

The subjects of this study were Koreans in their teens to 70's or older, and a survey was conducted regardless of the region. From November 13, 2021, 600 people were surveyed over four days, and 544 responses were received. Among them, 538 responses were statistically processed as the final survey data, excluding six whose survey data lacked credibility because of double and erroneous responses [9-11]. The contents of the survey consisted of four areas: individual characteristics of the subjects, understanding and knowledge of HMR, preference for HMR, and future thoughts and direction of HMR (Figure 1).



FIG. 1. Example of HMR.

Results and Discussion

Personal characteristics of the research subjects

Looking at the personal characteristics of the subjects, 532 people were surveyed, ranging from teens to over 70's, and the age and gender of the respondents were evenly organized (Figure 2). As a result of checking the educational background of the respondents by age, it was confirmed that the population in their 70's or older who were born in an era of economic hardship and agriculture did not attend high school or higher. Certainly, many people in their 20's and under their 40's graduated from graduate school or higher. As for occupation, the subjects of the survey were in their teens to 20's, so there were more choices in other than specific occupations. In addition, the owners of self-employment or companies accounted for a greater proportion than general office workers. Contrary to expectations, most of them lived with families (93.8%) rather than single-person households, and unlike in the past, many men also know how to cook basic dishes.

Regarding the consumption of HMR other than instant food, 91 out of 532 respondents (17.1%) answered that they had never eaten, and among them, 15 (16.5%) did not recognize that the food they ate was HMR.

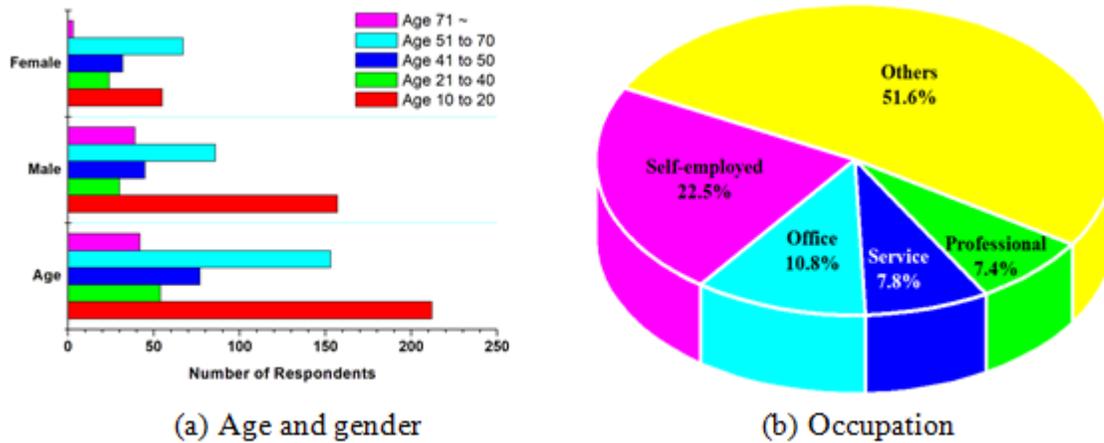


FIG. 2. Personal characteristics of the respondents.

Unlike in the past, food companies are producing convenience foods in the Original Development Manufacturing method (ODM) and distributing them to each chain store to protect recipes, which are company secrets. When asked if they knew this, 200 (38%) respondents said they did not know, 241 (45%) answered that they knew, and 91 (17%) knew only side menu items such as dumplings and pork belly as convenience HMRs (Figure 3).

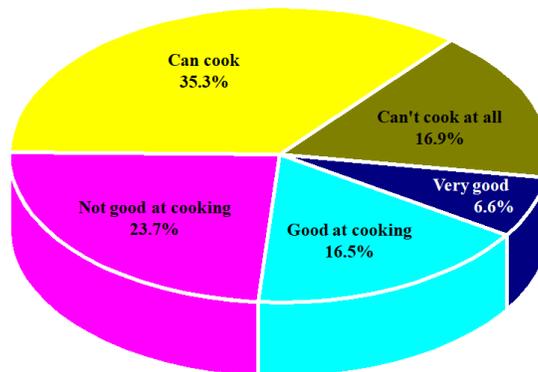


FIG. 3. Cooking ability of the respondents.

Preference of HMR

Overall, when choosing one meal as a HMR, 59.5% responded positively, 26.5% answered average, and 14.0% said it was not good. The reason for such a positive choice can be found in the social perception change, as well as the marketing effect of healthy food companies according to the development of food preservation and packaging technology. In the past, HMR was mainly used for the purpose of quickly and easily solving one meal because of the busy daily life for economic development. As women enter society, the number of single-person households as well as dual-income couples has increased. Therefore, it can be seen that an increasing number of people prefer HMRs that are easy and convenient to consume.

HMR had the largest proportion of preference because it was easy to eat at any time, and the majority chose it, followed by saving time. In addition, as the number of dual-income households and single-person households increased, it became difficult to manage food materials, so there were no leftovers, which made it possible to keep the refrigerator clean. The biggest reason for negative thoughts about HMR was that it was not good for health, accounting for 37.6%. For other reasons, 8.4% were because they did not taste good. This is an area in which companies that produce HMRs should also improve.

Owing to Korea's advanced food delivery system, it was expected that many people would choose delivery food when dining alone. However, contrary to expectations, 44.4% of the respondents chose home HMR. Delivery food accounted for 32.4%, and instant food accounted for 13.3%. The meal kit showed the lowest value of 9.9%. As a result, if a total of HMR is added, it is 67.6%, which is 32.4% for delivery food, thus confirming a higher preference.

When the question was changed to a meal that could be recommended to acquaintances, home HMR was the most common (44.7%), followed by delivery food (36.1%). It can be inferred that healthy food was recommended to acquaintances because the milk kit was 10.0% slightly higher than instant food (9.2%).

In terms of the number of times they chose HMR during the month, 293 people chose HMR less than 5 times, 127 people less than 10 times, 55 people less than 20 times, 9 people more than 20 times, and 48 people did not eat HMR. Reasons for preferring HMRs were: time saving (41.4%), easy post-meal processing (17.5%), better health than instant food (15.4%), and not being good at cooking (13.7%).

In the case of meal kits, which are currently popular, many products have been developed and produced, and unexpected results have been obtained. Not eating was the most at 44.4%. Then, to feel a little bit of cooking (20.0%), because the ingredients were delivered separately and seemed fresh (15.4%), people around me bought it (11.0%) and added ingredients to make my own dishes (9.2 %) in that order.

Accessibility and future direction of HMR

The biggest competitor in the HMR market is thought to be the delivery food. This is because it is easier to eat anywhere. Delivery in Korea is known to have the best infrastructure worldwide. However, since the minimum delivery amount is said to be the minimum amount for delivery, most cases require delivery to be at least 12,000 won (\$10). Therefore, it is burdensome for ordinary office workers to order food for delivery. For this reason, the impact of HMR with less convenience than delivery food, but having a competitive price on the market, was confirmed when delivery food can be replaced by more than 90% due to the development of convenient food packaging technology. If that happened, 15.3% said they were willing to eat HMR unconditionally, 44.2% said they could eat HMR more often than delivery food, 21.9% said they could eat HMR, although it was annoying after processing, and 9.3% said they would not eat HMR. Among them, the positive answer that they would eat HMR rather than delivery food was high at 81.4%.

At present, HMR is also readily available, and the most common places to purchase are large marts, followed by online ordering, local supermarkets, and other stores. In addition, when purchasing HMR, the most important thing for people to consider is taste, followed by quality, cost-effectiveness, assortment of contents, and brands. As such, it was confirmed that people valued taste more than brand.

As the HMR market has greatly increased owing to the current corona virus pandemic, people's interest in HMR has also increased. In predicting changes in the HMR market after the end of the corona pandemic, 23.2% said that the market would grow more than the market that increased due to corona, 37.3% that the market that increased due to corona would be maintained, and the market that increased due to corona is higher than now 23.8% said it would decrease slightly; 3.6% said that the market increased due to the corona virus would be the same again, and 12% did not know. The opinion that the HMR market, which has increased due to Corona, will continue to grow accounted for 60.5%.

Unlike in the past, society is rapidly becoming a single-person household or nuclear family; therefore, many changes in food culture are expected in the future. At this time, as a result of predicting changes in the HMR market, the demand of the market will gradually increase, 69.1%, maintain the status quo, 19.1%, demand will decrease 2.6%, demand will disappear 1.3%, do not

know 7.9 % was shown. In other words, 69.1% of those who answered that the market would be more lenient accounted for more than half.

Compared to the East, the development of HMR is lacking in the West. In the East, Japan, Korea, and China have developed a HMR market and Japan accounts for the largest number of patents for HMR worldwide, followed by Korea. However, in Japan, the majority of ramen and gimbal types are used, and Korea is in the process of patenting ramen and home-made meal kits. In addition, as foreigners interest in Korean food increased due to the Hallyu (Korean wave), 83% of the opinions were overwhelmingly high, saying go abroad quickly now and testing with a small amount of product first.

In terms of which HMR products would like to be launched in the future, the questions were: products that can learn simple cooking (48.8%), high-quality products that can be eaten at famous hotels (29.6%), products for famous overseas cuisines seen on TV (12.3%), and products that can be used for ancestral rites or special occasions (9.4%) appeared in that order. Among them, the most desired HMR was identified as a product that could learn simple cooking.

Conclusion

Since the COVID-19 pandemic, increasing number of people has enjoyed home-cooked meals. People who eat home-cooked food want meals that are easier to prepare. An increasing number of single-person households are also seeking comfortable meals. This phenomenon is not unique to Korea. An increasing number of people are looking for simple meals, regardless of the country. The global market for home HMRs is expected to reach \$189.1 billion next year. As the market grows, competition for development is fierce all over the world. This study can be used as basic data for the development of HMRs.

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Conflicts of Interest

The authors declare no conflict of interest.

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