## Prepared Meals and Sides - US - November 2015

Report Price: $£ 2466.89$ | $\$ 3995.00 \mid € 3133.71$

This report looks at the following areas:

- Prepared meals/ sides sales languish
- Sides capitalize on meal declines

The widespread perception of these products as overly processed and thereby unhealthy is leading the category to continued sales declines year-on-year, with no end in sight and few bright spots on the horizon. Side dishes appear to be capitalizing on consumer interest in smaller plates, and improved entrée sales in natural supermarkets suggest more natural options could at least stem the tide of the otherwise downward sales spiral the category has seen for most of this decade.


The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Frozen and refrigerated meals and side dishes are convenient, easy, and diverse, all attributes long popular among consumers.

BUY THIS REPORT NOW<br>VISIT: store.mintel.com<br>CALL: EMEA<br>+44(0)2076064533<br>Brazil<br>08000959094<br>Americas<br>$+1(312) 9435250$<br>China<br>$+86(21) 60327300$<br>APAC<br>$+61(0) 282848100$<br>EMAIL: reports@mintel.com

## Prepared Meals and Sides - US - November 2015

Report Price: $£ 2466.89$ | $\$ 3995.00 \mid € 3133.71$
The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

## Overview

## What you need to know

Definition

## Executive Summary

## The issues

Prepared meals/sides sales languish
Figure 1: Total US sales and fan chart forecast of prepared meals and sides, at current prices, 2010-20

## Sides capitalize on meal declines

Figure 2: Total US retail sales and forecast of prepared meals and side dishes, by segment, at current prices, 2010-20

## The opportunities

Three quarters of consumers eating the same or more prepared meals than a year ago
Figure 3: Consumption of frozen meals and sides, August 2015
Parents seek healthier prepared meal options
Figure 4: Wants and needs of prepared meals and sides, by presence and number of children in household, August 2015
Prepared meal price resonates particularly with Hispanic Millennials
Figure 5: Reasons for eating prepared meals or sides, by Hispanic origin and Millennial generation, August 2015

## What it means

## The Market - What You Need to Know

## Sales falling in prepared meals

Sides emerge as consumer usage expands
Foodservice competing against prepared meals/sides

## Market Size and Forecast

## Prepared meals/sides sales stall

Figure 6: Total US sales and fan chart forecast of prepared meals and sides, at current prices, 2010-20
Figure 7: Total US sales and forecast of market, at current prices, 2010-20

## Market Breakdown

Side dishes emerge, as meals decline
Figure 8: Total US retail sales and forecast of prepared meals and side dishes, by segment, at current prices, 2010-20
Natural sector sees added frozen entrée sales
Figure 9: Natural supermarket sales of prepared entrees, at current prices, rolling 52-weeks Sept 2013-Sept 2015
Figure 10: Natural supermarket sales of prepared entrees, by presence of GMO ingredients, at current prices, rolling 52-weeks ending Sept. 8, 2013, and Sept. 6, 2015
Figure 11: Natural supermarket sales of prepared entrees, by organic ingredients, at current prices, Sept. 6, 2015; \% change versus rolling 52 -weeks ending Sept. 8, 2013

## Market Perspective

Consumers finding meals in foodservice
Figure 12: Real disposable personal income, updated March 10, 2015

## Prepared Meals and Sides - US - November 2015

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 13: Barriers to restaurant usage, by region, April 2015

## Market Factors

Prepared meal consumption resonates among households with children
Figure 14: US households, by presence of own children, 2003-13
Hispanics, particularly Millennials, opt for prepared meals/sides
Figure 15: US population by race and Hispanic origin, 2009, 2014, and 2019

## Key Players - What You Need to Know

Processed products hard-pressed to resonate with health-oriented consumers
Frozen meals chill
Biodynamic, the next organic?

## Manufacturer Sales of Prepared Meals and Sides

Processed perception negatively impacting prepared meal/side sales
Manufacturer sales of prepared meals and sides
Figure 16: MULO sales of prepared meals and sides, by leading companies, rolling 52-weeks 2014 and 2015

## What's Working?

Breakfast options ease morning mealtime
Figure 17: MULO sales of Marie Callender's, 52-weeks ending July 12, 2015
Figure 18: Hormel Compleats Good Mornings Ham Breakfast Scramble
Figure 19: Jimmy Dean Breakfast Bowl Chorizo Breakfast
Making the most of multiserve
Figure 20: MULO sales of Pinnacle Foods Group Birds Eye, 52-weeks ending July 12, 2015

## Sides take center stage

Figure 21: MULO sales of Nestle's Stouffer's Side Dish Collection, 52-weeks ending July 12, 2015
Figure 22: MULO sales of Pinnacle Foods Group's Birds Eye Steamfresh, 52-weeks ending July 12, 2015
Figure 23: Total US retail sales of prepared meals and side dishes, by segment, at current prices, 2013 and 2015

## What's Struggling?

Weight management not managing well
Figure 24: MULO sales of Lean Cuisine, 52-weeks ending July 12, 2015
Figure 25: MULO sales of HJ Heinz Weight Watchers Smart Ones, 52-weeks ending July 12, 2015
Frozen meals falling
Figure 26: Total US retail sales and forecast of frozen meals, by segment, at current prices, 2010-20

## What's Next?

Free-from for all
Figure 27: TruRoots Multigrain Curry Rice
Figure 28: Van's Natural Foods Gluten Free Ultimate Cheddar Penne Pasta
Figure 29: Made in Nature Organic Cuban Mojo Ancient Grain Fusion
Figure 30: Three Bridges Chicken Enchilada Casserole

## Prepared Meals and Sides - US - November 2015

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 31: Kahiki StirFresh General Tso's Chicken

## Boasting biodynamic

Figure 32: Amy's Bowls Biodynamic Vegetable Penne \& Marinara
Figure 33: Lundberg Biodynamic Organic Short Grain Brown Rice

## The Consumer - What You Need to Know

Consumption widespread, but consumers turning away from frozen meals/sides
Restaurant brands could resonate in retail
Consumers seeking less-processed meals and sides

## Consumption of Frozen Meals and Sides

Three quarters of consumers eating the same or more prepared meals than a year ago
Figure 34: Consumption of frozen meals and sides, August 2015
Downward trend in frozen meal consumption continues
Figure 35: Number of frozen meals eaten in the last 30 days, Spring 2011 versus Spring 2015
Healthy attributes could lure those eating less
Figure 36: Purchase factors, any top five ranking, by any frozen meal consumption, August 2015
Households with children eating more prepared meals/sides
Figure 37: Consumption of frozen meals and sides, by number of children in household, August 2015
Frozen meals resonate with Hispanic Millennials
Figure 38: Consumption of frozen meals and sides, by Hispanic origin and generation, August 2015
Prepared options have room for improvement even among frequent consumers
Figure 39: Reasons for consuming prepared meals and sides, by consumption, August 2015

## Prepared Meals Factor Mostly at Dinner

Prepared meals primarily at dinner
Figure 40: Occasions for eating prepared meals and sides, August 2015
Larger households turn to prepared meals/sides
Figure 41: Occasions for consuming prepared meals and sides, by presence and age of children in household, August 2015
Hispanic flavors could encourage consumption
Figure 42: Occasions for consuming prepared meals and sides, by Hispanic origin, by generation, August 2015

Purchase Factors for Prepared Meals and Side Dishes
Calories and vegetables highlight health needs in prepared meals/sides
Figure 43: Purchase factors, any rank 1-5, August 2015
Women 35+ much more likely to weigh sodium levels
Figure 44: Purchase factors, any rank 1-5, by gender by age, August 2015
Different factors for Millennial moms and dads
Figure 45: Purchase factors, any rank 1-5, by Millennial parents, August 2015
Figure 46: Purchase factors, any rank 1-5, by parents, August 2015
Hispanics factor fiber in their meal/side choices
Figure 47: Purchase factors, any rank 1-5, by Hispanic origin, by generation, August 2015

## Prepared Meals and Sides - US - November 2015

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

# Wants and Needs from Prepared Meals and Side Dishes 

Quality, family-size options appeal
Figure 48: Wants and needs of prepared meals and sides, August 2015
Parents looking for healthier prepared meal options
Figure 49: Wants and needs of prepared meals and sides, by presence and number of children in household, August 2015
Freshness resonates with Hispanic consumers
Figure 50: Wants and needs of prepared meals and sides, by Hispanic origin by generation, August 2015

## Nutrition, Customization I mpact Meal Purchase

Nutrition concerns prompt flight from prepared options
Figure 51: Opinions of prepared meals and sides, August 2015
Figure 52: Opinion and use of frozen meals, April 2010-J une 2015
Processing impacting prepared meal perceptions
Figure 53: Opinions of prepared meals and sides, by presence and number of children in household, August 2015
Customizing potential for Millennial parents
Figure 54: Opinions, any agree, by generation by parental status, August 2015
Meal brands resonate with Hispanic Millennials
Figure 55: Opinions, any agree, by Hispanic origin, by generation, August 2015
Luring back meal consumers
Figure 56: Purchase factors, any agree by opinions of those eating less prepared meals and sides, August 2015

## Convenience, Cuisine Range Impact Prepared Meal Consumption

Convenience being a given, other reasons drive prepared meal consumption
Figure 57: Reasons for eating prepared meals or sides, August 2015
International cuisines could resonate with Millennial prepared meal consumers
Figure 58: Reasons for eating prepared meals or sides, by age, August 2015
Prepared meals could introduce young people to new flavors, cuisines
Figure 59: Reasons for eating prepared meals or sides, by presence and age of children, August 2015
Prepared meal price resonates particularly with Hispanic Millennials
Figure 60: Reasons for eating prepared meals or sides, by Hispanic origin and Millennial generation, August 2015

## Consumer Segmentation

Figure 61: Prepared meal and side clusters, July 2015
Group one: Brand buyers
Opportunities
Figure 62: Attitudes and behaviors - Any agree, by target group, July 2015
Group two: Health hunters
Opportunities
Figure 63: Attitudes and behaviors - Any agree, by target group, July 2015
Group three: Natural needers
Opportunities

# Prepared Meals and Sides - US - November 2015 

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 64: Attitudes and behaviors - Any agree, by target group, July 2015

## Appendix - Data Sources and Abbreviations

## Data sources

Sales data
Fan chart forecast
Consumer survey data
Abbreviations and terms

## Appendix - Market

Figure 65: Total US retail sales and forecast of prepared meals and side dishes, at inflation-adjusted prices, 2010-20
Figure 66: Total US retail sales and forecast of prepared meals and side dishes, by segment, at current prices, 2010-20
Figure 67: Total US retail sales and forecast of prepared meals and side dishes, by segment, at current prices, 2010-20 (continued)
Figure 68: Total US retail sales and forecast of single-serve frozen meals, at current prices, 2010-20
Figure 69: Total US retail sales and forecast of single-serve frozen meals, at inflation-adjusted prices, 2010-20
Figure 70: Total US retail sales and forecast of multiserve frozen meals, at current prices, 2010-20
Figure 71: Total US retail sales and forecast of multiserve frozen meals, at inflation-adjusted prices, 2010-20
Figure 72: Total US retail sales and forecast of refrigerated meals, at current prices, 2010-20
Figure 73: Total US retail sales and forecast of refrigerated meals, at inflation-adjusted prices, 2010-20
Figure 74: Total US retail sales and forecast of frozen side dishes, at current prices, 2010-20
Figure 75: Total US retail sales and forecast of frozen side dishes, at inflation-adjusted prices, 2010-20
Figure 76: Total US retail sales and forecast of refrigerated side dishes, at current prices, 2010-20
Figure 77: Total US retail sales and forecast of refrigerated side dishes, at inflation-adjusted prices, 2010-20
Figure 78: Total US retail sales of prepared meals and side dishes, by channel, at current prices, 2010-15
Figure 79: Total US retail sales of prepared meals and side dishes, by channel, at current prices, 2013 and 2015
Figure 80: US supermarket sales of prepared meals and side dishes, at current prices, 2010-15
Figure 81: US sales of prepared meals and side dishes through other retail channels, at current prices, 2010-15
Figure 82: Natural supermarket sales of prepared entrees, by segment, at current prices, rolling 52-weeks ending Sept. 8, 2013, and Sept. 6, 2015
Figure 83: Natural supermarket sales of prepared entrees, by type, at current prices, rolling 52-weeks ending Sept. 8, 2013, and Sept. 6, 2015
Figure 84: Natural supermarket sales of grain and rices dishes, by type, at current prices, rolling 52-weeks ending Sept. 8, 2013, and Sept. 6, 2015

## Appendix - Key Players

Figure 85: MULO sales of single-serve frozen meals, by leading companies and brands, rolling 52-weeks 2014 and 2015
Figure 86: MULO sales of multiserve frozen meals, by leading companies and brands, rolling 52-weeks 2014 and 2015
Figure 87: MULO sales of refrigerated meals, by leading companies and brands, rolling 52-weeks 2014 and 2015
Figure 88: MULO sales of frozen sides, by leading companies and brands, rolling 52-weeks 2014 and 2015
Figure 89: MULO sales of refrigerated sides, by leading companies and brands, rolling 52-weeks 2014 and 2015

## Appendix - Consumer

Figure 90: Opinions of frozen meals, prepared meals, Any agree, April 2010-J une 2015

