

Prepared Cakes and Pies - US - May 2016

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

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



"The market for prepared cakes and pies should continue growing for the foreseeable future. Consumer concerns relating to health and obesity appear somewhat less of a factor to this more indulgent category. However, consumer interest in options with reduced calories, fat, and sugar could signal both an opportunity for brands and a potential warning sign to the category's key players."
- William Roberts Jr, Senior Food & Drink Analyst

This report looks at the following areas:

- Cakes/pies sales growth to slow, but continue positive growth
- Families consume more cakes/pies, but households with children are declining
- Stand-alone bakeries' higher quality perception challenges prepared cakes and pies

This Report builds on the analysis presented in Mintel's *Prepared Cakes and Pies – US, June 2014*, as well as the August 2012 and June 2011 Reports of the same title, in addition to *Cakes and Pies – US, December 2008* and the October 2007 Report of the same title. It also builds on the analysis presented in Mintel's *In-Store Bakeries – US, June 2015* and the March 2013, August 2012, August 2010, August 2009, August 2008, and July 2007 Reports of the same title.

For the purposes of this Report, Mintel has used the following definition:

- Cakes and pies baked in stores
- Frozen and refrigerated cakes and pies
- Shelf-stable cakes and pies
- Shelf-stable cupcakes and brownies

Not included in this Report are:

- Products generally considered breakfast foods, such as coffeecake, pastries, muffins, and doughnuts
- In-store baked bread products such as loaf bread, rolls, buns, croissants, bagels, and English muffins, which are explored more in-depth in Mintel's *In-Store Bakeries – US, June 2015 Report*
- Cake mixes
- Pie crusts
- Cookies
- Frozen or refrigerated cheesecake

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Prepared Cakes and Pies - US - May 2016

Report Price: £2466.89 | \$3995.00 | €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

Cakes/pies sales growth to slow, but continue positive growth

Figure 1: Total US sales and fan chart forecast of prepared cakes and pies, at current prices, 2010-20

Families consume more cakes/pies, but households with children are declining

Figure 2: Households, by presence of own children, 2003-13

Stand-alone bakeries' higher quality perception challenges prepared cakes and pies

Figure 3: Purchase of bakery items, March 2015

The opportunities

Consumers express interest in sampling variety of cakes/pies

Figure 4: Factors for increasing purchase, by purchase factors, February 2016

Emotional factors influencing cake/pie consumption

Figure 5: Consumption behaviors, by generation, February 2016

Gourmet brands could appeal to Millennials

Figure 6: Attitudes, by generation, February 2016

What it means

The Market – What You Need to Know

Growth forecast for cakes/pies

Bakery options could create competition for prepared cakes/pies

Increasing disposable income could lead to less consumption

Market Size and Forecast

Cakes/pies sales growth to slow, but continue positive growth

Figure 7: Total US sales and fan chart forecast of prepared cakes and pies, at current prices, 2010-20

Figure 8: Total US sales and forecast of prepared cakes and pies, at current prices, 2010-20

Market Breakdown

Sales of frozen/refrigerated options chill

Figure 9: Sales of prepared cakes and pies, by segment, 2015

Figure 10: Sales of prepared cakes and pies, by segment, 2013 and 2015

Market Perspective

Stand-alone bakeries' higher-quality perception

Figure 11: Purchase of bakery items, March 2015

Millennials mix with mixes

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Prepared Cakes and Pies - US - May 2016

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

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

Figure 12: Benefits of and motivations for using baking mixes – Convenience and enjoyment, by Millennials versus non-Millennials, September 2015

Market Factors

Rising obesity rates could strongly impact cake/pie category

Figure 13: Trends in obesity prevalence among adults aged 20 and over (age-adjusted) and youth aged 2-19 years: US, 1999-2000 through 2013-14
Figure 14: Current diet status, July 2015

Increased consumer confidence likely to lead to less at-home cooking

Figure 15: Consumer Sentiment Index, January 2007-November 2015

Youth movement could lead to more cake/pie demand

Figure 16: US population by generation, 2010-20

Figure 17: Households, by presence of own children, 2003-13

Key Players – What You Need to Know

Few players control lion's share of cake/pie market

Relative newcomer gains significant traction

Potential for free-from claims in cake/pies

Manufacturer Sales of Prepared Cakes and Pies

Mckee Foods maintains significant market share lead

Manufacturer sales of prepared cakes and pies

Figure 18: MULO sales of prepared cakes and pies, 2015-16

What's Working?

A healthy indulgence

Figure 19: General Mills Fiber One

Private label holds sizable share of shelf-stable market

Figure 20: MULO sales of shelf-stable cakes and pies, by leading companies and brands, rolling 52-weeks 2015 and 2016; market share in parentheses

Marie Callender's capitalizing on from-scratch positioning

Figure 21: Marie Callender's Peach Pie

Figure 22: Marie Callender's Dutch Apple Pie TV ad, "Make Special Moments," 2016

Artisanal advantages

Figure 23: Café Valley Bakery Cinnamon Cream Cheese Coffeecake

What's Struggling?

Little Debbie's lackluster returns

Figure 24: Little Debbie launches

Figure 25: Little Debbie TV ad, "Younger You," 2016

Sara Lee slumps

Figure 26: Sara Lee Raspberry Crème Flaky

What's Next?

Potential for refrigerated (chilled) varieties

Figure 27: Prepared cakes and pies launches versus storage, 2011-15

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Prepared Cakes and Pies - US - May 2016

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

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

Sustainable options

Figure 28: Prepared cakes/pies with sustainable claims

Pies/cakes with free-from claims

Figure 29: Prepared cakes/pies with free-from claims

The Consumer – What You Need to Know

Consumption varies depending on presence of children

Cakes/pies as a snack

Consumers want to sample before purchase

Package size playing a key role

Organic options compelling Millennials

Consumers recognize need for moderation of cake/pie consumption

Usage of Prepared Cakes and Pies

Prepared options are challenged by mix interest

Figure 30: Usage of prepared cakes and/or pies, February 2016

Black consumers consuming notably more snack cakes

Figure 31: Usage of prepared cakes and/or pies, by race, February 2016

Parents baking from scratch and mixes

Figure 32: Usage of prepared cakes and/or pies, by parental status by gender, February 2016

Households with children turn to prepared cakes and pies

Figure 33: Usage of prepared cakes and/or pies, by number of children under 18 in household, February 2016

Cake/pie consumers seeking more flavor options

Figure 34: Usage, by attitudes – Any agree, February 2016

Younger generations turning to baking mixes and from scratch

Figure 35: Usage of prepared cakes and/or pies, by generation, February 2016

Hispanic interest in scratch options challenge prepared options

Figure 36: Usage of prepared cakes and/or pies, by Hispanic origin, February 2016

Usage Occasions

Cakes/pies an option for snacking and dessert occasions

Figure 37: Usage occasions, February 2016

Millennials incorporating prepared cakes/pies into meals

Figure 38: Usage occasions, by generation, February 2016

Income factors strongly in cake/pie consumption

Figure 39: Usage occasions, by household income, February 2016

Concerns about preservatives impact consumers

Figure 40: Usage occasions, by attitudes – Any agree, February 2016

Cakes/pies utilized notably as a part of Hispanics' meals

Figure 41: Usage occasions, by Hispanic origin, February 2016

Increasing Purchases of Cakes/Pies

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Prepared Cakes and Pies - US - May 2016

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

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

Samples could prove persuasive to consumers

Figure 42: Factors for increasing purchase, February 2016

Family-size options of greater interest to younger demos

Figure 43: Factors for increasing purchase, by generation, February 2016

Larger formats of more interest to Hispanics

Figure 44: Factors for increasing purchase, by Hispanic origin, February 2016

Opinions of Prepared Cakes and Pies

Consumer interest in new flavors and varieties

Figure 45: Consumption behaviors, February 2016

Emotional factors influencing cake/pie consumption

Figure 46: Consumption behaviors, by generation, February 2016

Freshly prepared options of less interest to larger households

Figure 47: Consumption behaviors, by number of children under 18 in household, February 2016

Hispanics turn to cakes/pies to boost mood

Figure 48: Consumption behaviors, by Hispanic origin, February 2016

Cake/Pie Purchase Factors

Nutrients could prove compelling

Figure 49: Purchase factors, February 2016

Organic cakes/pies of notable interest to Millennials

Figure 50: Purchase factors, by generation, February 2016

Health factors appear to cross income demographics

Figure 51: Purchase factors, by household income, February 2016

Allergen issues of significantly greater interest to parents

Figure 52: Purchase factors, by parental status, February 2016

Low/no claim-seeking consumers looking for greater flavor variety

Figure 53: Usage, by purchase factors, January 2016

Healthier options could compel Hispanic consumers of cakes/pies

Figure 54: Purchase factors, by Hispanic origin, February 2016

Attitudes toward Cakes/Pies

Consumers recognize need for moderation in cake/pie consumption

Figure 55: Attitudes, February 2016

Gourmet brands could appeal to Millennials

Figure 56: Attitudes, by generation, February 2016

Category-loyal consumers interested in greater variety

Figure 57: Usage occasions, by attitudes – Any agree, February 2016

Customization impacting cakes/pies

Figure 58: Usage, by attitudes – Any agree, February 2016

Hispanics interested in greater variety of flavors in cakes/pies

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Prepared Cakes and Pies - US - May 2016

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

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

Figure 59: Attitudes, by Hispanic origin, February 2016

Appendix – Data Sources and Abbreviations

Data sources
Sales data
Fan chart forecast
Consumer survey data
Abbreviations and terms
Abbreviations

Appendix – Market

Figure 60: Total US sales and forecast of prepared cakes and pies, at inflation-adjusted prices, 2010-20
Figure 61: Total US retail sales and forecast of prepared cakes and pies, by segment, at current prices, 2010-20
Figure 62: Total US retail sales of prepared cakes and pies, by segment, at current prices, 2013 and 2015
Figure 63: Total US retail sales and forecast of frozen/refrigerated cakes/pies, at current prices, 2010-20
Figure 64: Total US retail sales and forecast of frozen/refrigerated cakes/pies, at inflation-adjusted prices, 2010-20
Figure 65: Total US retail sales and forecast of shelf-stable cakes/pies, at current prices, 2010-20
Figure 66: Total US retail sales and forecast of shelf-stable cakes/pies, at inflation-adjusted prices, 2010-20
Figure 67: Total US retail sales and forecast of shelf-stable cupcakes/brownies, at current prices, 2010-20
Figure 68: Total US retail sales and forecast of shelf-stable cupcakes/brownies, at inflation-adjusted prices, 2010-20
Figure 69: Total US retail sales and forecast of in-store baked cakes/pies, at current prices, 2010-20
Figure 70: Total US retail sales and forecast of in-store baked cakes/pies, at inflation-adjusted prices, 2010-20
Figure 71: Total US retail sales of prepared cakes and pies, by channel, at current prices, 2010-15
Figure 72: Total US retail sales of prepared cakes and pies, by channel, at current prices, 2013 and 2015
Figure 73: US supermarket sales of prepared cakes and pies, at current prices, 2010-15
Figure 74: US sales of prepared cakes and pies through other retail channels, at current prices, 2010-15

Appendix – Key Players

Figure 75: MULO sales of frozen and refrigerated cakes and pies, by leading companies and brands, rolling 52-weeks 2015 and 2016
Figure 76: MULO sales of shelf-stable cakes and pies, by leading companies and brands, rolling 52-weeks 2015 and 2016
Figure 77: MULO sales of cupcakes and brownies, by leading companies and brands, rolling 52-weeks 2015 and 2016

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com