

Report Price: £3215.29 | \$3995.00 | €3762.21

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



"Frozen snacks' market size has remained remarkably consistent at just under the \$5 billion mark for several years and is forecast to maintain that level for the foreseeable future."

- William Roberts, Jr, Senior Food & Drink Analyst

This report looks at the following areas:

- Sales remain at just under \$5 billion
- Snack competition from foodservice
- Growth of grazing
- Number of households with children continues to shrink

Whether that is stability or stagnation, the category continues to resonate with young consumers and families, but these consumers may well turn to more convenient items with healthful attributes among other snack options and leave frozen snack brands looking for an audience.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:EMEA
+44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Sales remain at just under \$5 billion

Figure 1: Total US sales and fan chart forecast of frozen snacks, at current prices, 2010-20

Snack competition from foodservice

Figure 2: Food sales at home and away from home, January 2003-December 2016

Growth of grazing

Figure 3: Daily snacking frequency, by generation, March 2017

Number of households with children continues to shrink

Figure 4: Households, by presence of own children, 2006-16

The opportunities

Hispanic consumers likely to turn to trusted brands

Figure 5: Purchase factors, by Hispanic origin, February 2017

Potential among growing Hispanic, Asian demographics

Figure 6: Population by race and Hispanic origin, in millions, 2012-22

Shifting notions of convenience bring new demands – and opportunities

Figure 7: Purchase factors, February 2017

What it means

The Market - What You Need to Know

Frozen snack sales remain largely frozen

Value options stealing share from brands

Restaurants add snackable options

Competition strong in the snacking space

Market Size and Forecast

Historic and projected sales performance

Figure 8: Total US sales and fan chart forecast of frozen snacks, at current prices, 2010-20

Figure 9: Total US sales and forecast of frozen snacks, at current prices, 2011-21

Market Breakdown

Frozen snack segments largely stagnant

Figure 10: Sales of frozen snacks, by segment, current year, 2011-21

Consumer attention shifts to other channels

Figure 11: Total US retail sales of frozen snacks, by channel, at current prices, 2011-16

Market Perspective

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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Diversity of snack options impact frozen

Figure 12: Total US sales of various snack categories, at current prices, 2010-15

Foodservice operators focus on snack opportunities

Figure 13: Food sales at home and away from home, January 2003-December 2016

Market Factors

Grazing grows

Figure 14: Daily snacking frequency, by generation, March 2017

Households with children more likely to consume frozen snacks

Figure 15: Households, by presence of own children, 2006-16

Key Players - What You Need to Know

Few success stories in a category steeped in stagnation

Free-from rings

Food truck appeal doesn't transcend to frozen

Genetic modification labels appear

Company and Brand Sales of Frozen Snacks

Pockets of brand growth in a largely stagnant category

Sales of frozen snacks by company

Figure 16: MULO sales of frozen snacks, by leading companies, rolling 52 weeks 2015 and 2016

What's Working?

Flavorful, free-from

Figure 17: Frozen snack launches with free-from claims, 2016 $\,$

Figure 18: Frozen snack launches, by claim, 2014-17*

Restaurant inspiration fuels apps and handheld options

Figure 19: Frozen snack launches with foodservice inspiration, 2016

Private label frozen snacks surge

Novel ingredients/flavors in store-brand frozen snacks

Private label options embrace packaging innovation

Figure 20: Branded versus private label frozen snack launches, 2013-17

Figure 21: Frozen snack launches under private label brands, 2016

What's Struggling?

TGI Friday's focus shifts from frozen

Figure 22: TGI Friday's sole frozen snack launch, 2016

Food truck appreciation far from universal

Figure 23: Hot Pockets inspired by food truck brands, 2016

Figure 24: Purchase intent, Hot Pockets sandwiches, versus Hot Pockets Food Truck Bites

What's Next?

Genetically modified labels begin to appear

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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Figure 25: Genetic modification and frozen snack launches, 2016

Figure 26: GMO-free claims among frozen snack launches, 2013-16

The Consumer - What You Need to Know

Frozen snack consumption strong among young men

Handhelds fall short of frozen snack penetration

Kid friendly could be a blessing and a curse

Snacking in place of a meal

More-convenient snacks may encroach on frozen snack's consumer base

Flavor, not health, the route to category growth

Fathers factoring quality into their frozen snack purchase

Frozen stigma tough to overcome

Frozen Snack Consumption

Internationally inspired options failing to resonate

Figure 27: Consumption, February 2017

Consumption lags among women and older demographics

Figure 28: Consumption of frozen snacks, any eaten, by gender and age, February 2017

Dads likely to turn to frozen snacks

Figure 29: Consumption of frozen snacks, any eaten, by parental status by gender, February 2017

Consumption stronger among urban consumers, particularly parents

Figure 30: Consumption of frozen snacks, any eaten, by area, February 2017

Figure 31: Consumption of frozen snacks, any eaten, by area and presence of children in household, February 2017

Strong consumption among Hispanic Millennials

Figure 32: Consumption of frozen snacks, any eaten, by Hispanic origin, February 2017

Frozen Handheld Sandwich Purchase

Handhelds underperform snacks

Figure 33: Purchase of frozen handheld snacks, February 2017

Handheld consumption largely among the young

Figure 34: Purchase of frozen handheld snacks, by gender and age, February 2017

Regardless of income, handheld consumption skews younger

Figure 35: Purchase of frozen handheld snacks, by household income, February 2017

Hispanic Millennials more likely to eat frozen handhelds

Figure 36: Purchase of frozen handheld snacks, by Hispanic origin, February 2017

Occasions for Consumption

Snacking all the time

Figure 37: Occasions for eating frozen snacks, February 2017

Most frequent snackers more likely to eat frozen snacks in the morning

Figure 38: Consumption frequency, by occasions for eating frozen snacks, February 2017

Parents and the morning snack

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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Figure 39: Occasions for eating frozen snacks, by parental status, February 2017

Frozen snack party

Figure 40: Occasions for eating frozen snacks, by gender and age, February 2017

Attributes of Frozen Snacks

Convenience leads among consumer descriptions

Figure 41: Attributes of frozen snacks, February 2017

Frozen snacks largely regarded as kid friendly

Figure 42: Attributes of frozen snacks, by parental status, February 2017

Convenience, taste matter strongly to urban consumers of frozen snacks

Figure 43: Attributes of frozen snacks, by area, February 2017

Purchase Factors for Frozen Snacks

Brand, satiety factor strongly in purchase behavior

Figure 44: Frozen snack brand consumption, by age, Spring 2016

Figure 45: Purchase factors, February 2017

Parents seeking variety

Figure 46: Purchase factors, by parental status, February 2017

Brand weighs more heavily on Hispanic purchase

Figure 47: Purchase factors, by Hispanic origin, February 2017

Meal replacers seeking satiety

Figure 48: Consumption occasions, by purchase factors, February 2017

Brand factors for party appetizers

Figure 49: Consumption occasions, by purchase factors, February 2017

Usage of Frozen Snacks

Frozen snacks may lose ground to more-convenient options

Figure 50: Opinions of usage of frozen snacks, February 2017

Frozen snacks not easy to prepare, say young consumers

Figure 51: Opinions of usage of frozen snacks, by gender and age, February 2017

Parents appear to be seeking easier snacks

Figure 52: Opinions of usage of frozen snacks, by parental status (presence of children under 18) by gender, February 2017

Other snacks may be easier, even for frequent frozen snackers

Figure 53: Consumption frequency, by opinions of usage of frozen snacks, February 2017

Parties of opportunity for frozen snacks

Figure 54: Consumption occasions, by opinions of usage of frozen snacks, February 2017

Shifting notions of convenience bring new demands

Figure 55: Consumption occasions, by opinions of usage of frozen snacks, February 2017

Opinions of Health and Frozen Snacks

$\label{theorem} \mbox{Healthful challenges for frozen snacks}$

Figure 56: Opinions of health and frozen snacks, by generation, February 2017

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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Healthier options not likely to lure more consumers

Figure 57: Consumption frequency, by opinions of health and frozen snacks, February 2017

Frozen Snack Quality

Snacking in place of meals

Figure 58: Opinions of frozen snack quality, February 2017

High-quality options of greater importance to fathers

Figure 59: Opinions of frozen snack quality, by parental status (presence of children under 18) by gender, February 2017

Income strongly impacts quality, brand choices

Figure 60: Opinions of frozen snack quality, by household income, February 2017

Deterrents to Purchasing Frozen Snacks

Health, freshness deterring frozen snack consumption

Figure 61: Purchase deterrents, February 2017

Sodium levels deterring even younger consumers

Figure 62: Purchase deterrents, by gender and age, February 2017

Hispanic Millennials favor homemade over frozen

Figure 63: Purchase deterrents, by Hispanic origin, February 2017

Sodium factoring even into party appetizer choice

Figure 64: Occasions, by purchase deterrents, February 2017

Appendix - Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations

Abbreviations

Appendix - Market

Figure 65: Total US sales and forecast of market, at inflation-adjusted prices, 2011-21

Figure 66: Total US retail sales and forecast of frozen snacks, by segment, at current prices, 2011-21

Figure 67: Total US retail sales of frozen snacks, by segment, at current prices, 2014 and 2016

Figure 68: Total US retail sales and forecast of frozen appetizers/snack rolls/pretzels, at current prices, 2011-21

Figure 69: Total US retail sales and forecast of frozen appetizers/snack rolls/pretzels, at inflation-adjusted prices, 2011-21

Figure 70: Total US retail sales and forecast of frozen handheld entrees, at current prices, 2011-21

Figure 71: Total US retail sales and forecast of frozen handheld entrees, at inflation-adjusted prices, 2011-21

Figure 72: Total US retail sales of frozen snacks, by channel, at current prices, 2014 and 2016

Figure 73: US supermarket sales of frozen snacks, at current prices, 2011-16

Figure 74: US sales of frozen snacks through other retail channels, at current prices, 2011-16

Appendix - Key Players

Figure 75: MULO sales of frozen appetizers/snack rolls/pretzels, 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



Report Price: £3215.29 | \$3995.00 | €3762.21

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

Figure 76: MULO sales of frozen handheld entrees, by leading companies and brands, rolling 52 weeks 2015 and 2016

Appendix - Consumer

Figure 77: Frozen snack brand consumption, by gender, spring 2016

Figure 78: Frozen snack brand consumption, by Hispanic origin, spring 2016

Figure 79: Frozen snack brand consumption, by household income, spring 2016

Figure 80: Frozen snack brand consumption, by region, spring 2016

Figure 81: Frozen snack statement agreement, any agree, by gender, spring 2016

Figure 82: Frozen snack statement agreement, any agree, by age, spring 2016

Figure 83: Frozen snack statement agreement, any agree, by race, spring 2016

Figure 84: Frozen snack statement agreement, any agree, by Hispanic origin, spring 2016

Figure 85: Frozen snack statement agreement, any agree, by household income, spring 2016

Figure 86: Frozen snack statement agreement, any agree, by education, spring 2016

Figure 87: Frozen snack statement agreement, any agree, by region, spring 2016