## Frozen Snacks - US - April 2017

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

## Frozen Snacks - US - April 2017

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

## Frozen Snacks - US - April 2017

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

## Frozen Snacks - US - April 2017

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

## Frozen Snacks - US - April 2017

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

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

## Frozen Snacks - US - April 2017

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

## Frozen Snacks - US - April 2017

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

