

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"Snacking is more popular than ever, with 95% of US consumers snacking at least once daily and the share snacking multiple times per day on the rise. Yet, while snacking may be a great fit for today's highly mobile consumers, significant competition has made it difficult for frozen snacks to achieve solid growth."
Mimi Bonnett, Director - Food and Drink, Foodservice

This report looks at the following areas:

- The snack space is on fire; frozen still cold
- Snackers are headed in new directions
- Consumers age out of frozen snacks

Nevertheless, 70% of adults and more than 75% of their children ages 6 and up eating a frozen snack within the last month indicating this \$5 billion category is still holding its own. In this Report Mintel identifies potential opportunities for growth within the sector.

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

арас +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: £3254.83 | \$4395.00 | €3662.99

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
	Overview Figure 1: Total US sales and fan chart forecast of frozen snacks, at current prices, 2014-24
	The issues
	The snack space is on fire; frozen still cold Figure 2: Percentage growth in select snack categories, 2013-18
	Snackers are headed in new directions Figure 3: frozen snacks consumption trends, by key demographics, February 2019
	Consumers age out of frozen snacks Figure 4: Household consumption of frozen snacks, by age and gender, February 2019
	The opportunities
	Frozen snacks beyond snack time Figure 5: Frozen snack occasions, February 2019
	Solidify an identity beyond convenience Figure 6: Frozen and refrigerated foods associations, February 2019
	What it means
	The Market – What You Need to Know
	Holding steady, but growth is elusive
	Apps, smaller snacks see more improvement
	Watch out for QSRs
	Consumers snacking more
	Sunny outlook for plant-based proteins
	Market Size and Forecast
	Slow but steady Figure 7: Total US sales and fan chart forecast of frozen snacks, at current prices, 2014-24
	Figure 8: Total US retail sales and forecast of frozen snacks, at current prices, 2014-24

Market Breakdown

Faster longer-term growth expected for appetizers

Figure 9: Total US retail sales and forecast of frozen snacks, by segment, at current prices, 2014-24

Supermarkets a less prevalent channel

Figure 10: Total US retail sales of frozen snacks, by channel, at current prices, 2014-2018

Market Perspective

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Tough competition from foodservice operators

Figure 11: Total US retail sales and forecast of limited service restaurants, at current prices, 2013-2023

Market Factors

Snacking frequency on the rise

Figure 12: Snacking frequency, January 2015 and November 2018

Keep an eye on shifting demos

Figure 13: Population by age, 2013-23

The mainstreaming of plant-based

Figure 14: Dietary preferences, by age, February 2019

Be the life of the party?

Figure 15: Types of in-home parties hosted, April 2018

Hispanics a key demographic

Figure 16: Total US and Hispanic population and growth, 2018-60

Key Players – What You Need to Know

Bright spots seen in a fragmented market

Laser targeting from KHZ

The transition from foodservice to freezer is tough

Thaw and go enters hummus territory

Company and Brand Sales of Frozen Snacks

Some industry leaders manage to buck the trends

Figure 17: Sales of market, by company, 52 weeks ending Mar. 25, 2018 and 52 weeks ending Mar. 24, 2019

What's Working?

Devour targets the blurry line between meal replacement and snack

Figure 18: devour food porn/boss

Figure 19: Devour sandwiches, 2018

Meshing with millennial moms

Figure 20: Frozen sandwich products from J.M. Smucker and Hormel, 2018-2019

What's Struggling?

From QSR to the freezer aisle?

Figure 21: Pepsico Doritos Loaded and Mac N' Cheetos products, 2017-2018

The challenges of navigating change

What's Next?

More thaw and eat

Figure 22: Hummus Pods from The Modern Pod Company, 2018

Revolutionizing the frozen snack aisle

Figure 23: Evol products, 2018-2019

The Consumer – What You Need to Know

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Strong base driven by young men, families and Hispanics

Frozen snack consumption is out of sync with snack frequency

Everybody loves pizza (snacks)

Frozen snacks most often eaten at home

Associations with convenience, taste

Consumers are abandoning the category

Solid interest in new flavors, cleaner ingredients

Household Consumption of Frozen Snacks

Figure 24: Household consumption of frozen snacks, by age and gender, February 2019

Young men represent the core adult consumers

Figure 25: Household consumption of frozen snacks, by age and gender, February 2019

Parental status keeps adults engaged

Figure 26: Household consumption of frozen snacks, by parental status, February 2019

Figure 27: Adult frozen snack consumption repertoire, February 2019

Figure 28: Child frozen snack consumption repertoire, February 2019

Hispanic and multicultural households are frozen snack fans

Figure 29: personal consumption of frozen snacks, by race and Hispanic origin, February 2019

Frozen Snack Consumption Frequency

Room to expand frequency

Figure 30: Frequency of frozen snack consumption, February 2019

Age impacts consumption frequency

Figure 31: Adult frequency of frozen snack consumption, by age and gender, February 2019

Parents, kids key consumers

Figure 32: Adult Frequency of frozen snack consumption, by parental status, February 2019

Figure 33: Child frozen snack consumption frequency, by age of child, February 2019

Types of Frozen Snacks Consumed

Pizza formats lead consumption

Figure 34: Types of frozen snacks consumed February 2019

Figure 35: Types of frozen snacks consumed, by age and gender, February 2019

Young men eat the most diverse range of frozen snacks

Figure 36: Repertoire analysis of frozen snacks consumed, by Adult age and gender, February 2019

Kids love all kinds of snacks

Figure 37: Types of frozen snacks consumed by children in the household, by age, February 2019

Children eat wide variety of snacks

Figure 38: Repertoire analysis of frozen snacks consumed by children, February 2019

Frozen Snack Occasions

Everyday occasions dominate frozen snack consumption

Figure 39: Frozen snack occasions, February 2019

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Young men snack often and at all hours

Figure 40: Occasions for frozen snacks consumption, by gender and age, February 2019

Parents take snacks to go

Figure 41: Occasions for frozen snacks consumption, by parental status, February 2019

Teens eat snacks at meals - and as meals

Figure 42: Occasions for frozen snacks consumption, by age of child, February 2019

Frozen Snack Associations

Frozen snacks best known for speed

Figure 43: Attributes associated with various snacks, February 2019

Women may need some attention from frozen snack brands

Figure 44: Attributes associated with frozen snacks, by gender, February 2019

Frozen snacks fall short with parents on kid-friendly

Figure 45: Attributes associated with frozen snacks, by parental status, February 2019

Frozen Snack Attitudes and Behaviors

Shifts in consumption are slightly imbalanced

Figure 46: Attitudes and behaviors on frozen snacks, February 2019

Men show signs of wanting to engage even more

Figure 47: Attitudes and behaviors on frozen snacks, by gender, February 2019

Hispanics more likely to cut back on frozen snacks

Figure 48: Attitudes and behaviors on frozen snacks, February 2019

Interest in Frozen Snack Innovation

Complex flavors, premium and cleaner labels could spark trial

Figure 49: Interest in frozen snack innovation, February 2019

Men and women seek different innovations

Figure 50: Interest in frozen snack innovation, by age and gender, February 2019

Parents crave diverse convenience

Figure 51: Interest in frozen snack features, by parental status, February 2019

TURF Analysis

New flavors, less preservatives and more protein

Figure 52: Table - TURF Analysis – Frozen snack innovation/attributes, February 2019

Figure 53: TURF Analysis - Frozen snack innovation/attributes, February 2019

Appendix – Data Sources and Abbreviations

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

BUY THIS REPORT NOW



Report Price: £3254.83 | \$4395.00 | €3662.99

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

Appendix – The Market

Figure 54: Total US sales of frozen snacks, at inflation-adjusted prices, 2014-24

Figure 55: Total US sales of frozen appetizers/snack rolls/pretzels, at inflation-adjusted prices, 2014-24

Figure 56: Total US sales of frozen handheld entrees, at inflation-adjusted prices, 2014-24

Appendix – Key Players

Figure 57: Sales of frozen snacks for leading companies, by brand, 52 weeks ending Mar. 25, 2018 and 52 weeks ending Mar. 24, 2019

BUY THIS REPORT NOW