

Frozen Snacks - US - April 2014

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"Concerns about the nutritional value of frozen snacks will continue to be top of mind for consumers. Manufacturers will need to reformulate or expand their product offerings, ensuring these items meet consumer preferences. More frequent snacking occasions will also impact product offerings, as well as the retail locations in which these products are sold."

– Amanda Topper, Food Analyst

This report looks at the following areas:

- What effect will more frequent snacking have?
- How can negative health perceptions of frozen snacks be improved?
- How will the changing retail landscape impact the category?

The \$4.6 billion frozen snacks category grew just 9% from 2008-13. Although both segments within the category benefit from fairly high household penetration rates, negative perceptions about their processed nature, and frozen foods in general, have the potential to suppress future growth. Despite poor nutritional perceptions related to the category, consumers continue to seek out the products, especially because of their convenience, as snacking occasions increase. Product reformulations, new formats, and flavors will help the category grow, especially among younger consumers, men, and households with children, who over index in use. Greater retail availability, especially in non-supermarket channels, such as convenience stores and warehouse stores, will also contribute to future growth.

Mintel provides a comprehensive analysis of the following factors that have the greatest potential to impact the category's performance:

- Types of frozen snacks purchased and how purchase preferences differ by demographics
- Occasions in which frozen snacks are consumed, including use as snacks and meal replacements
- Reasons for not consuming frozen snacks related to health, price, convenience, flavor, or format
- Impact of shifting US demographics including fewer households with children and increasing ethnic populations
- How health, price, flavor, and function impact consumer attitudes toward frozen snacks
- The factors that have the most influence on purchases of frozen snacks
- Attributes associated with a variety of frozen snacks including frozen appetizers and frozen handhelds
- Current product positioning and what marketing strategies make the most sense given the various target audiences that manufacturers are trying to connect with to maximize sales opportunities
- Which brands are gaining, which are losing, and why, within the market
- How factors such as increased snacking occasions and health concerns are impacting the market as a whole

This report builds on the analysis presented in Mintel's *Frozen Snacks – US, May 2013*, as well as the 2012, 2007, 2008, and 2010 reports bearing the same name. The report also builds on analysis presented in Mintel's *Frozen Handheld – US, June 2012*.

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DID YOU KNOW?

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

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