

# Hot Dogs and Sausages: Incl Impact of COVID-19 - US - November 2020

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- COVID-19 impact on consumer behavior regarding hot dogs and sausages
- The impact of the recession upon the category
- Leveraging the value and versatility of hot dogs and sausages
- The potential for flavor innovation in the category

The hot dog and sausage category saw significant COVID-19-related sales gains in 2020, nearing \$10.5 billion, yet the growth is not sustainable and sales are expected to should fall back to pre-pandemic levels as consumer adapt to new routines and mealtime habits. Still, issues that plagued the category pre-COVID persist. The hot dog segment has been in steady decline for much of the past five years. Sausages, particularly breakfast varieties, should continue their generally positive sales performance, after adjusting back to the pre-COVID norm presumably in 2021.



“Between the category depth, versatility and cost-effectiveness, hot dogs and sausages were well positioned both during the pandemic and for the economic uncertainties it triggered. The category made significant sales gains, including a considerable turnaround for the hot dog segment after consecutive years of declining sales.”

– Billy Roberts, Sr. Analyst – Food and Drink

## Buy this report now

Visit	<a href="https://store.mintel.com">store.mintel.com</a>
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

## Table of Contents

### OVERVIEW

- What you need to know
- Key issues covered in this Report
- Definition
- COVID-19: Market context
- Economic and other assumptions

### EXECUTIVE SUMMARY

- Top takeaways
- Market overview
- Pre-pandemic sales patterns to return

Figure 1: Total US sales and forecast of hot dogs and sausages, at current prices, 2015-25

Figure 2: Total US sales and forecast of hot dogs and sausages, at current prices, 2015-25
- Impact of COVID-19 on hot dogs and sausages

Figure 3: Short-, medium- and long-term impact of COVID-19 on hot dogs and sausages, November 2020
- Opportunities and Challenges
- Re-emergence

Figure 4: Ease and affordability of hot dogs/sausages, July 2020
- Recovery

Figure 5: Health concerns and hot dogs and sausages, by age, July 2020

### THE MARKET – KEY TAKEAWAYS

- Strong 2020 sales to roll back in 2021
- Segment sales to return to pre-pandemic norms
- Consumer shifts shift category usage
- Reduced recessionary spending would disrupt the category

### MARKET SIZE AND FORECAST

- 2020 surge will be fleeting

Figure 6: Total US sales and forecast of hot dogs and sausages, at current prices, 2015-25

Figure 7: Total US sales and forecast of hot dogs and sausages, at current prices, 2015-25
- Macroeconomic factors

Figure 8: Expected US unemployment, 2019-25
- Impact of COVID-19 on hot dogs and sausages

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Figure 9: Short-, medium- and long-term impact of COVID-19 on hot dogs and sausages, July 2020

- **Lockdown**
- **Re-emergence**
- **Recovery**
- **COVID-19: US context**
- **Learnings from the last recession**

Figure 10: Total US retail sales of hot dogs and sausages, 2007-12

## SEGMENT PERFORMANCE

- **2020 gives temporary rise to the category underperformer – hot dogs**

Figure 11: Total US retail sales and forecast of hot dogs and sausages, by segment, at current prices, 2015-25

- **Supermarkets increase hot dog/sausage market share**

Figure 12: Total US retail sales of hot dogs and sausages, by channel, at current prices, 2018 and 2020

## MARKET FACTORS

- **Meat market volatility an opportunity for hot dogs and sausages**

Figure 13: Changes in consumer food price indexes, 2015-21 (forecast)

- **Shrinking households with children will impact category future**

Figure 14: US households, by presence of related children, 2008-18

- **Increased work at home impacts mealtime choices**

Figure 15: Employment status during pandemic, June 2020

## MARKET OPPORTUNITIES

- **Getting grilled**
- **Opportunity in the category's value and versatility**

Figure 16: Reasons for purchase of hot dogs/sausage, July 2020

- **Encourage consumers to "trade up"**

Figure 17: Hot dog and sausage attitudes, July 2020

- **Plant-based options emerge as healthier alternatives**

## COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Amid growth, brand share remains consistent**
- **New product innovation edges away from meat**
- **Focus on unique flavors**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

## MARKET SHARE

- **Stellar 2020 sales benefit most leading brands**
- **Sales of hot dogs and sausages by company**  
Figure 18: Sales of hot dogs and sausages, by company, 2019 and 2020
- **Three brands control half of the hot dog market**  
Figure 19: US multi-outlet sales of hot dogs, by leading companies and brands, rolling 52 weeks 2019 and 2020
- **Johnsonville leads dinner sausage brands**  
Figure 20: US multi-outlet sales of dinner sausages, by leading companies and brands, rolling 52 weeks 2019 and 2020
- **Jimmy Dean dominates breakfast**  
Figure 21: US multi-outlet sales of breakfast sausages, by leading companies and brands, rolling 52 weeks 2019 and 2020

## COMPETITIVE STRATEGIES

- **Meatless options leveraging innovation and healthy reputation**
- **Sausage flavor innovation gets adventurous**
- **Private label innovation fuels dinner sausage success**

## THE CONSUMER – KEY TAKEAWAYS

- **Protein preference associated with age**
- **Parents are multiple channel shoppers**
- **Help consumers get creative with recipes**
- **Break up daypart and format patterns**
- **Flavor, quality drives product choice**
- **Unhealthy reputation drives category attrition, especially among under-55s**

## HOT DOG AND SAUSAGE PURCHASE

- **Red meat options prove most popular**  
Figure 22: Hot dog and sausage purchase, July 2020
- **"All or nothing" approach for the majority of category consumers**  
Figure 23: Repertoire Analysis – Hot dog and sausage purchase, July 2020
- **Protein preference associated with consumer age**  
Figure 24: Hot dog and sausage purchase, by age, July 2020
- **Strong category loyalty among parents**  
Figure 25: Hot dog and sausage purchase, by parental status, by gender, July 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit	store.mintel.com
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

- **Sausage patties can extend beyond breakfast**

Figure 26: Formats of sausage purchased, by household income, July 2020

## HOT DOG/SAUSAGE PURCHASE LOCATION

- **Supermarkets far outpace other retailers for hot dogs/sausages**

Figure 27: Hot dog/sausage purchase location, July 2020

- **Parents shop a variety of channels**

Figure 28: Hot dog/sausage purchase location, by parental status, July 2020

- **Brands and retailers can partner to create increased occasions**

Figure 29: Reasons for purchase of hot dogs and sausages – Easy use in recipes, by hot dog/sausage purchase location, July 2020

## REASONS FOR PURCHASE OF HOT DOGS/SAUSAGES

- **Taste, ease of use lead category drivers**

Figure 30: Reasons for purchase of hot dogs/sausage, July 2020

- **Category needs a perception shift among younger consumers**

Figure 31: Reasons for purchase of hot dogs/sausage, by age, July 2020

- **Protein content driving meatless hot dogs/sausages**

Figure 32: Reasons for purchase of hot dogs and sausages – “they are a good source of protein,” by hot dog and sausage purchase, July 2020

- **Unhealthy reputation lingers**

Figure 33: Reasons for not purchasing hot dogs or sausages, July 2020

## HOT DOG/SAUSAGE USE

- **Break conventional consumption habits**

Figure 34: Correspondence Analysis – Symmetrical map – Hot dog/sausage use, July 2020

Figure 35: Hot dog/sausage use, July 2020

- **Parents more likely turn to hot dogs year-round**

Figure 36: Hot dog/sausage use, by parental status, July 2020

## IMPORTANT HOT DOG/SAUSAGE FEATURES

- **Flavor and premium resonate**

Figure 37: Hot dog and sausage features, July 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

- **Local, sustainable, alternative options resonating with younger consumers**

Figure 38: Interest in natural or alternative hot dogs and sausages, by household income, July 2020

- **Drivers behind meat counter consumers**

Figure 39: Hot dog and sausage features, by types of hot dog/sausage purchased, July 2020

## ATTITUDES TOWARD HOT DOGS AND SAUSAGES

- **Considerable interest in improved packaging**

Figure 40: Hot dog and sausage attitudes, July 2020

- **Parents much more likely to say non-red-meat options are healthier**

Figure 41: Hot dog and sausage quality and health, by parental status, July 2020

- **Health concerns much more likely affecting young people's consumption**

Figure 42: Health concerns and hot dogs and sausages, by age, July 2020

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations

## APPENDIX – THE MARKET

Figure 43: Total US retail sales and forecast of hot dogs and sausages, at current prices, 2015–25

Figure 44: Total US retail sales and forecast of hot dogs and sausages, at inflation-adjusted prices, 2015–25

Figure 45: Total US retail sales and forecast of hot dogs and sausages, by segment, at current prices, 2015–25

Figure 46: Total US retail sales of hot dogs and sausages, by segment, at current prices, 2018 and 2020

Figure 47: Total US retail sales and forecast of hot dogs, at current prices, 2015–25

Figure 48: Total US retail sales and forecast of hot dogs, at inflation-adjusted prices, 2015–25

Figure 49: Total US retail sales and forecast of dinner sausage, at current prices, 2015–25

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

## Hot Dogs and Sausages: Incl Impact of COVID-19 - US - November 2020

Report Price: £3695 | \$4995 | €4400

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



Figure 50: Total US retail sales and forecast of dinner sausage, at inflation-adjusted prices, 2015-25

Figure 51: Total US retail sales and forecast of breakfast sausage, at current prices, 2015-25

Figure 52: Total US retail sales and forecast of breakfast sausage, at inflation-adjusted prices, 2015-25

### APPENDIX – COMPANIES AND BRANDS

Figure 53: US multi-outlet sales of hot dogs, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 54: US multi-outlet sales of dinner sausages, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 55: US multi-outlet sales of breakfast sausages, by leading companies and brands, rolling 52 weeks 2019 and 2020

### APPENDIX – RETAILERS

Figure 56: Total US retail sales of hot dogs and sausages, by channel, at current prices, 2015-20

Figure 57: Total US retail sales of hot dogs and sausages, by channel, at current prices, 2018 and 2020

Figure 58: US supermarket sales of hot dogs and sausages, at current prices, 2015-20

Figure 59: US sales of hot dogs and sausages through other retail channels, at current prices, 2015-20

### APPENDIX – CORRESPONDENCE ANALYSIS – METHODOLOGY

Figure 60: Hot dog/sausage use, July 2020

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.