

Frozen Breakfast - US - 2022

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:

- Consumers are not at all unfamiliar with frozen breakfast foods, with a market penetration of 80%, yet there is considerable room to grow their repertoires.
- Amid higher prices, value is a clear driver to consumers, but there are multiple routes to convey that concept, including versatility.
- Much like breakfast overall, nutritional innovation in frozen breakfast foods should be incremental, and brands should not expect consumers to make wholesale lifestyle changes.
- Differentiating frozen breakfast foods from key competitors would give the category a distinct positioning but also help diversify its usage occasions and open it up to other dayparts.
- Quality improvements could help frozen breakfast foods penetrate the weekend morning meal occasion, which has more or less been focused on more leisurely, deliberate preparation methods.
- Restaurant inspiration can further category usage among younger "foodie" generations.

Frozen breakfast foods enjoy a considerable portion of consumer share, with eight in 10 having eaten the products in the past month. Yet, engagement by segment is notably shy of that height, with frozen waffles the only one that breaks 33%. However, bundling deals could not only increase consumer awareness and usage of different category offerings but also appeal to people seeking to stretch their food dollars in an era of higher prices all around.

Those inflationary pressures have impacted the category's performance over the past year, but in a positive way. As a frequently less-expensive option to dining out, frozen breakfast foods are seen as a relatively cost-effective approach to a quick breakfast, especially as more work-from-home routines have managed to keep breakfast at home as well. Indeed, category sales have outpaced inflation over the past two years. The category has grown 22%



"Sales of frozen breakfast foods actually outpaced the considerable rates of inflation over the past year and continue to improve upon the sizable increases seen in the pandemic-fueled increase of 2020."

– Billy Roberts, Sr. Analyst –
Food and Drink

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

Frozen Breakfast - US - 2022

Report Price: £3695 | \$4995 | €4400

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

in that time, even on top of the dramatic growth seen in 2020. However, as inflation abates and consumer discretionary spending again finds room for dining out, frozen breakfast foods will need to establish a role beyond simple convenience to remain in the consideration set for consumers.

Improvements in health and perceptions of quality would help set frozen breakfast food brands apart from competitors. Yet, particularly when it comes to health, brands should note that consumer interest is more geared toward small, incremental improvements, rather than wholesale behavior changes.

At the same time, with people keen on breakfast for other meals, there appears to be an opportunity for frozen breakfast to potentially penetrate not only other dayparts but even snacking occasions with heartier, quickly prepared fare.

MINTEL

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

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**
- **This Report looks at the following areas**
- **Definitions**
- **Market context**

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
- **Frozen breakfast continues to make gains on top of pandemic increases**

Figure 1: Total US sales and fan chart forecast of frozen breakfast foods, at current prices, 2017-27

Figure 2: Total US sales and forecast of market, at current prices, 2017-27

Figure 3: Frozen breakfast foods outlook, 2022-27

- **Challenges and opportunities**
- **Put frozen options into more consumer routines**
- **Nutrition and health messaging should focus on incremental improvements**

Figure 4: Repertoire of frozen breakfast foods consumption, by age and parental status, 2022

Figure 5: Frozen breakfast introductions, by launch type, by claim, 2021-22

- **Sneak into snacking to reach contemporaries**

Figure 6: Frozen breakfast consumption, by age, 2022

MARKET SIZE AND FORECAST

Figure 7: Total US sales and fan chart forecast of frozen breakfast foods, at current prices, 2017-27

Figure 8: Total US sales and forecast of market, at current prices, 2017-27

SEGMENT PERFORMANCE

- **Growth continues apace, even atop 2020's sizable gains**
- **Value and convenience driving a shift to other retailers for frozen breakfast**

Figure 9: Sales and forecast of frozen breakfast foods, by segment, 2017-27

Figure 10: Total US retail sales of frozen breakfast food, 2022, by channel, at current prices, 2017-22

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

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

MARKET FACTORS

- **Breakfast remains largely an at-home occasion**
Figure 11: Breakfast locations, 2022
- **Breakfast ingredients are at the center of inflation**
Figure 12: Changes in Consumer Price Indexes for food, 2020 through 2023
- **BFY breakfast makes people feel better about themselves**
Figure 13: Breakfast attitudes and behaviors – Health, by age, 2022
- **Breakfast time at any time**
Figure 14: Breakfast attitudes and behaviors – Menu flexibility, by age, 2022
- **At-home workers point to need for better taste experiences**
Figure 15: Work-from-home status, 2022

MARKET SHARE/KEY PLAYERS

- **Private label, other brands gain ground on frozen breakfast leaders**
- **Sales of frozen breakfast by company**
Figure 16: Sales of frozen breakfast, by company, 2021-22
- **Company/brand sales by segment**
- **Frozen breakfast entrees**
Figure 17: Multi-outlet sales of frozen breakfast entrees, by leading companies and brands, rolling 52 weeks 2021 and 2022
- **Frozen breakfast handhelds**
Figure 18: Multi-outlet sales of frozen breakfast handhelds, by leading companies and brands, rolling 52 weeks 2021 and 2022
- **Frozen waffles**
Figure 19: Multi-outlet sales of frozen waffles, by leading companies and brands, rolling 52 weeks 2021 and 2022

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Innovation rising but missing the mark?**
Figure 20: Frozen breakfast introductions, by launch type, by claim, 2021-22
- **It's not just about breakfast**
Figure 21: Frozen breakfast behaviors, by work-from-home status, 2022

THE FROZEN BREAKFAST CONSUMER – FAST FACTS

- **Widespread use, yet limited repertoires, calls for expanded habits**

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

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

- **Consumers seeking more versatility with frozen breakfast preparation**
- **Grow frozen breakfast’s attributes beyond convenience**

FROZEN BREAKFAST CONSUMPTION

- **Room to grow the consumer base and increase options used by current category users**
Figure 22: Repertoire of frozen breakfast foods consumption, by age and parental status, 2022
- **Draw upon adaptability, customizability to complement value**
Figure 23: Frozen breakfast consumption, 2022
- **Sneak into snacking to reach contemporaries**
Figure 24: Frozen breakfast consumption, by age, 2022

REASONS FOR FROZEN BREAKFAST FOOD PURCHASE

- **Shift consumer perceptions from convenience to quality**
Figure 25: Reasons for frozen breakfast food purchase, 2022
- **Quality and versatility can take the category beyond a convenience**
Figure 26: TURF analysis – Reasons for frozen breakfast food purchase, 2022
Figure 27: Table – TURF analysis – Reasons for frozen breakfast food purchase, 2022

INTEREST IN FROZEN BREAKFAST INNOVATION

- **Protein edges closer to being an expectation at breakfast**
Figure 28: Interest in frozen breakfast innovation, 2022
- **Draw elusive nonparents with packaging upgrades**
Figure 29: Interest in frozen breakfast innovation, by parental status, 2022

BREAKFAST FOOD ASSOCIATIONS

- **Better distinguish frozen options from the breakfast pack**
Figure 30: Breakfast food associations, 2022

FROZEN BREAKFAST BEHAVIORS

- **Increased versatility and quality can fire consumer reimagining of frozen breakfast foods’ potential**
Figure 31: Frozen breakfast behaviors, 2022
- **Parents are ripe targets for new ideas**
Figure 32: Frozen breakfast behaviors, by parental status, 2022
- **Not just for breakfast, anymore**

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

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 33: Frozen breakfast behaviors, by work-from-home status, 2022

FROZEN BREAKFAST ATTITUDES

- **Clean ingredients, customization can convey health and quality**

Figure 34: Frozen breakfast attitudes, 2022

- **Target Millennials, Gen Zs with culinary experiences**

Figure 35: Frozen breakfast innovation interest, by generation, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

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

APPENDIX – THE MARKET

Figure 36: Total US retail sales and forecast of frozen breakfast food, 2022, at current prices, 2017-27

Figure 37: Total US retail sales and forecast of frozen breakfast food, 2022, at inflation-adjusted prices, 2017-27

Figure 38: Total US retail sales and forecast of frozen breakfast food, 2022, by segment, at current prices, 2017-27

Figure 39: Total US retail sales of frozen breakfast food, 2022, by segment, at current prices, 2020 and 2022

Figure 40: Total US retail sales and forecast of frozen breakfast entrees, at current prices, 2017-27

Figure 41: Total US retail sales and forecast of frozen breakfast entrees, at inflation-adjusted prices, 2017-27

Figure 42: Total US retail sales and forecast of frozen breakfast handhelds, at current prices, 2017-27

Figure 43: Total US retail sales and forecast of frozen breakfast handhelds, at inflation-adjusted prices, 2017-27

Figure 44: Total US retail sales and forecast of frozen waffles, at current prices, 2017-27

Figure 45: Total US retail sales and forecast of frozen waffles, at inflation-adjusted prices, 2017-27

APPENDIX – RETAIL CHANNELS

Figure 46: Total US retail sales of frozen breakfast food, 2022, by channel, at current prices, 2017-22

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

Frozen Breakfast - US - 2022



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 47: Total US retail sales of frozen breakfast food, 2022, by channel, at current prices, 2020 and 2022

Figure 48: US supermarket sales of frozen breakfast food, 2022, at current prices, 2017-22

Figure 49: US sales of frozen breakfast food, 2022 through other retail channels, at current prices, 2017-22

APPENDIX – COMPANIES AND BRANDS

Figure 50: Sales of frozen breakfast, by company, 2021-22

Figure 51: Multi-outlet sales of frozen breakfast entrees, by leading companies and brands, rolling 52 weeks 2021 and 2022

Figure 52: Multi-outlet sales of frozen breakfast handhelds, by leading companies and brands, rolling 52 weeks 2021 and 2022

Figure 53: Multi-outlet sales of frozen waffles, by leading companies and brands, rolling 52 weeks 2021 and 2022

APPENDIX – CONSUMER

Figure 54: Average annual household spending on frozen breakfast food, 2022, 2017-22

APPENDIX – TURF METHODOLOGY

Figure 55: TURF Analysis – Reasons for frozen breakfast food purchase, 2022

Figure 56: Table – TURF Analysis – Reasons for frozen breakfast food purchase, 2022

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



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)**.