Frozen snacks have bounced back from an unstable past few years and steady, but minimal, growth is predicted looking ahead to 2022. Private label brands are performing strongly and legacy frozen snack brands remain stable, especially among parents with 85% acknowledging their kids eat frozen snacks. Despite the stability, increased competition from RTE snacks, such as snack bars and salty snacks, will continue to put pressure on the frozen snack category.

This report looks at the following areas:

- RTE, portable, and health-forward snacks gain increased consumption
- The snack preferences of young women are not as clear-cut
What you need to know

Definition

The issues

RTE, portable, and health-forward snacks gain increased consumption

Figure 1: Frequency of snack consumption, March 2018

The snack preferences of young women are not as clear-cut

Figure 2: Frequency of frozen snack consumption, by age and gender, March 2018

The opportunities

Private label product innovation is paying off

Figure 3: Product launches, by brands and private label, 2015-17

Households with children are a core purchase demographic

Figure 4: Household frozen snack consumption, March 2018

Women can visualize the meal potential in frozen snacks

Figure 5: Frozen snack habits, "feel they can be a light meal," by single and married men and women, March 2018

What it means

Frozen snack sales estimated to grow, but at a slow pace

Supermarkets are facing competition from other retailers

Restaurants cater to a "snack break" mentality

Market Size and Forecast

Frozen snack sales recover from a bumpy few years

Figure 6: Total US sales and fan chart forecast of frozen snacks, at current prices, 2012-22

Figure 7: Total US sales and forecast of frozen snacks, at current prices, 2012-22

Market Breakdown

Frozen appetizers lead in sales despite a smaller market share

Figure 8: Total US retail sales of frozen snacks, by segment, at current prices, 2015 and 2017

Grocery stores face stronger competition from other channels

Figure 9: Total US retail sales of frozen snacks, by channel, at current prices, 2012-17

Market Perspective

Consumers lean into snacks with health benefits, specifically protein

Figure 10: Frequency of snack consumption, March 2018

Restaurants have a unique snacking advantage

Figure 11: Made-to-order snack purchases in foodservice, March 2017
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Market Factors

- Blogs influence snack expectations
  - Young men and women have different views toward healthy snacking
    - Figure 12: Snack behavior – Health, by gender and age, March 2017

Key Players – What You Need to Know

- Cheese please...
  - Familiarity is essential for frozen snacks
  - Restaurants set a tone for international interest

Company and Brand Sales of Frozen Snacks

- Companies display signs of growth with private label leading the way
  - Figure 13: Multi-outlet sales of frozen snacks, by leading companies, rolling 52 weeks 2017 and 2018

What’s Working?

- Comfort style food maintains interest
  - Figure 14: Product launches for frozen mozzarella sticks and mac and cheese bites, 2015-17
- Private labels aim to stand out
  - Figure 15: Product launches, by brands and private label, 2015-17
- Pretzel mania stays strong
  - Figure 16: Frozen pretzel products launched, 2015-17

What’s Struggling?

- A premium message requires familiarity
  - Figure 17: Purchase intent, frozen snacks versus Lundberg Family Farms Arancini
  - Figure 18: Purchase intent, hors d'oeuvres/canapes versus mini beef franks

What’s Next?

- Restaurant menus set the tone for international influence
  - Figure 19: International cuisine consumption, at home versus away from home, February 2018
  - Figure 20: Growth of international cuisines on menus, Q4 2015-Q4 2017

The Consumer – What You Need to Know

- Consumers are snacking more, but it’s a competitive landscape
- Frozen snacks cater to more than one person in a home
- Regional cuisine interest could drive flavor innovation

Snack Consumption

- Frozen snacks maintain core audience in a scattered snack category
  - Figure 21: Snack and frozen snack consumption in the past year, March 2018
- Tradition remains strong for frozen snack brands
  - Figure 22: Frozen snack consumption in the past year, March 2018
- Salty snacks and chips focus on flavor innovation from restaurants
  - Figure 23: Snack consumption in the past year, March 2018

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Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 |
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Women aged 35+ place less reliance on frozen snacks
Figure 24: Frozen snack consumption in the past year, by males and age, March 2018

Parents remain loyal to frozen snacks
Figure 25: Snack and frozen snack consumption in the past year, by parents and nonparents, March 2018

**Snack Consumption Frequency**

A quarter of consumers are eating more frozen snacks
Figure 26: Frequency of snack consumption, March 2018
Figure 27: Frequency of frozen snack consumption, March 2018

iGens and Millennials
Figure 28: Frequency of snack consumption, by generations, March 2018
Figure 29: Frequency of snack consumption, any frozen snacks, by generations, March 2018

Young women’s frozen snack consumption not as stable as young men
Figure 30: Frequency of frozen snack consumption, by age and gender, March 2018

**Household Frozen Snack Consumption**

Kids love frozen snacks
Figure 31: Household frozen snack consumption, March 2018

Frozen snacks are a household snack
Figure 32: Household frozen snack consumption, by married and single men and women, March 2018

Frozen snacks cater to the social scene
Figure 33: Household frozen snack consumption among “My friends,” by generation and location, March 2018

**Snacks by occasion – Correspondence analysis**

Methodology

Frozen snacks stand apart as a meal replacement option
Figure 34: Snack associations, March 2018
Figure 35: Snack associations, March 2018

Age plays more of a role than gender for snack associations
Figure 36: Frozen snack associations, by gender and age, March 2018

**Frozen Snack Purchase Motivators**

Premium and protein drive greater purchasing, up to a point
Figure 37: Frozen snack purchase motivators, March 2018

Parents are motivated by appetizer appeal within frozen snacks
Figure 38: Frozen snack purchase motivators, by parents and nonparents, March 2018

Millennials are separated by different lifestages, but still share common ground
Figure 39: Frozen snack purchase motivators, by young, old, and non-Millennials, March 2018

Hispanics value shareable offerings
Figure 40: Frozen snack purchase motivators, by Hispanic origin, March 2018

**Frozen Snack Habits**

What’s for dinner? How about snacks?
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Women see the snack meal potential more so than men

Empty nest equals less-complicated meals for Baby Boomers

Consumers crave what already works

Appendix – Data Sources and Abbreviations

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

Appendix – The Market

Appendix – Key Players