

## Frozen Meals - US - October 2004 (\$2995.00)

From 1999-2004, increasing concerns with obesity and nutrition have changed the dynamics of the frozen meals market. High-protein diets such as Atkins and South Beach have decreased demand for frozen meals containing potatoes, pasta, or other starches. Consumers are demanding more information about their meal choices, and becoming more selective. As consumers prepare fewer meals at home, and the profitability of servicing these consumers is rising, increased competition for their dollars is being seen from in-store delis, restaurants, and take-outs.

In such a tight market, up-to-date consumer research is the best way to attract today's discerning consumer. Demographics certainly affect frozen meal purchase. Younger households tend to consume fewer frozen meals, while households with older respondents tend to consume higher quantities of frozen meals. Ethnicity skews are apparent, with Asian respondents being the least likely to consume frozen meals. Larger households are more likely to have higher consumption of frozen meals.

Mintel's consumer research shows that price is the primary factor in making a decision about frozen meal purchase. With an abundance of competitive options available to them, consumers are looking for value, package size which meets their family needs, confidence from a strong brand name, and nutritional balance.

For the purposes of this report, frozen meals (FMs) are defined as complete meals or entrées that are pre-cooked and frozen. FMs usually include a side dish and require minimal preparation or cooking time. Rice, pasta, noodle and vegetable dinners in "bowls" are included.

Frozen foods not included in this report:

--breakfast foods (covered in Mintel's Breakfast Foods: Vol. 1-The Market-U.S., consumer intelligence, October 2004 and Breakfast Foods: Vol. 2-The Consumer-U.S., consumer intelligence, November 2004)

--pizza (whole or french bread, rolls or puffs)

--burgers or sandwiches

--bulk meats, chicken or seafood (including frozen chicken pieces, fish sticks or shrimp when sold alone)

--hand-held entrées such as Hot Pockets, Lean Pockets or Croissant Pockets

--meal kits requiring meat, poultry or seafood add-ins (such as create-a-meals or stir-fry kits)

--bagel dogs or corn dogs

--egg rolls

--frozen soup

--vegetables, and pasta and vegetables, sold as a side dish

--pasta and sauce (such as bulk ravioli)

--potato products (for example, french fries and hash browns)

Other Mintel reports of relevance include:

- Pasta Sauces - US - January 2003
- Side Dishes - US - June 2003
- Canned Fruit & Vegetables - US - August 2003
- Hispanics and Food: Volume 1 - US - September 2003
- Pizza - US - October 2003
- Slimming Meals - US - October 2003
- Hispanics and Food: Volume 2 - US - October 2003
- Frozen Desserts - US - January 2004
- Shelf Stable Meals - US - April 2004
- Meal Kits - US - May 2004
- Low Carb - US - May 2004
- Soup - US - May 2004
- Kids' and Teens' Eating Habits - US - June 2004
- Eating Habits - US - July 2004
- Poultry - US - August 2004
- Fish and Seafood - US - September 2004
- Red Meat - US - October 2004
- Functional Food - US - October 2004
- Breakfast Foods: Volume 2 - The Consumer - US - October 2004
- Breakfast Foods: Volume 1 - The Marketplace - US - November 2004