

## Shelf Stable Meals - US - April 2004 (\$2995.00)

The shelf stable meal kits market grew dramatically from 1998 to 2003, increasing sales by 48% to \$770 million after adjusting for inflation. This growth occurred on two fronts. The first was a revitalization of the lead segment, meal kits requiring the addition of meat. The second area of growth was an essentially new segment, meal kits containing meat. From 1999 to 2001, General Mills (originator of the category) was engaged in a battle with Unilever, Kraft, and Campbell's Soup Company for the kits requiring meat segment. The products introduced and the promotions to support them propelled the segment to its peak in 2001, after which Unilever and perhaps Kraft abandoned this particular attempt, and sales declined accordingly.

In the kits with meat segment, General Mills is the more recent entrant, battling ConAgra's leading product, Banquet Homestyle Bakes, which was introduced in 2000. Kits with meat grew so rapidly during 2000-03 that the segment probably siphoned consumers from the kits requiring meat segment. Kits with meat grew by 24% in 2003, and an ever greater desire for convenience on the part of consumers, particularly younger ones, may sustain sales for some time to come. The third segment analyzed in this report, pizza kits, belongs to ConAgra's Chef Boyardee. This segment receives low marketing and development support, and is slowly declining.

As a market with sales under \$1 billion, meal kits' strongest competition is from other convenience foods, such as restaurant or fast foods, heat and eat foods, and frozen foods. All of these alternatives are more frequently used than meal kits, according to exclusive Mintel research conducted for this report. However, younger consumers have a greater need for simple and quick ways to prepare products and could prove to become core buyers of meal kits, should the products meet their tastes and tempt them away from restaurants.

Learn more about the changing attitudes toward shelf stable meals with Mintel's exclusive consumer research. Original research examines attitudes and behavior by age, gender, ethnicity and income, and a six-year trend analysis predicts future growth for the shelf stable meals market.

Meal kits are defined as shelf stable food items intended for use as main dishes, typically consisting of meat, starch, and a type of sauce. In addition, meal kits require users to combine and sometimes add outside ingredients (i.e. meat), either in a skillet or in a baking dish to be cooked.

Excluded from this report are shelf stable meals, such as canned pasta, including Chef Boyardee, shelf stable pasta like Kraft's It's Pasta Anytime; canned chili and stew; and frozen meal kits, such as Green Giant Complete Skillet Meals and Birds Eye Easy Recipe Creations.

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