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# Meal Kits: United States

November 2018



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# About This Report

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## Scope

This report forecasts US meal kit sales in nominal US dollars for 2018-2023. To illustrate historical trends, meal kit sales are provided for 2017.

This report focuses on fresh food meal kits sold by traditional meal kit delivery service companies through any venue, including non-traditional meal kit venues such as grocery stores, online sales through grocery stores, restaurants, and on-demand delivery services. Traditional meal kit companies such as Home Chef are included in the scope of this report even if they have been acquired by a company that does not specialize in meal kits. These companies primarily engage in the meal kit business and deliver (or arrange for delivery of) a box or bag of fresh ingredients for one or more meals, along with step-by-step recipes and photos showing how to cook each meal at home, to consumers' doors.

The value proposition of meal kits in scope of this report is that the need to plan meals, find recipes, and shop for groceries is eliminated to free up time for other tasks. Ingredients are portioned in just the right quantities for the recipe, and sometimes even prepped (pre-cut, marinated, packaged with pre-cooked sauce components, etc.) to speed and ease consumers' time spent in the kitchen.

Excluded from the scope of this report's market size are:

- online grocery shopping for general food and beverages
- online and in-store sales of meal kits that are not offered by traditional providers (e.g., **Prep+Pared** meal kits from Kroger, which is not a traditional meal kit company) to better focus on the novelty of the nationally available direct-to-consumer fresh food delivery model
- frozen meal kits and frozen meal solutions such as TV dinners and stir fry kits
- fully prepared meals that are ready to eat or ready to heat
- restaurant delivery or takeout, including restaurant-developed meal kits

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and

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ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

## Sources

*Meal Kits: United States* (FF10060) is based on *Meal Kits: Trends and Opportunities in the U.S.*, a comprehensive industry study published by Packaged Facts. That report used two primary data sources to define the meal kit market in the US. The first was Packaged Facts' own National Consumer Survey conducted in August and September 2018. The second was the Simmons Profile Report from Simmons Research. Packaged Facts' primary research also included interviews with food and beverage experts; on-site examination of retail and service provider venues; and internet canvassing of websites, blogs, and other social media.

That report was also based upon data collected from field surveys of food retailers in various channels and a wide range of industry sources, including company websites; trade publications; business newspapers and magazines; consumer blogs; annual reports, 10-Ks, and other releases from public companies; and information culled from Packaged Facts' extensive food and beverage market research database and report collection.

The analysis of demographic trends primarily relied on the consumer survey data compiled by Packaged Facts. The Packaged Facts National Consumer Surveys use a panel of 2,000 US adults (age 18+) balanced to the national population on the primary demographic measures of gender, age bracket, race/ethnicity, geographic region, marital status, presence or absence of children in the household, and household income.

Simmons' data were also used. On an ongoing basis, Simmons Research conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) who in aggregate represent a statistically accurate cross-section of the US population.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

# Industry Codes

Table 6 | NAICS & SIC Codes Related to Meal Kits

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
445110	Supermarkets and Other Grocery (except Convenience) Stores	4215	Courier Services, Except by Air
454111	Electronic Shopping	5411	Grocery Stores
492210	Local Messengers and Local Delivery	5961	Catalog and Mail-Order Houses

Source: US Census Bureau

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## Resources

### Packaged Facts

*Meal Kits: Trends and Opportunities in the U.S.*

### The Freedonia Group

#### Freedonia Industry Studies

*Commercial Refrigeration Equipment in the US*

*Food Safety Products in the US*

*Global Housing*

*Labels Market in the US*

*Produce Packaging Market in the US*

*Protective Packaging Market in the US*

*Retail E-Commerce Packaging Market in the US*

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*Food Dive*

*Food Navigator-USA*

*Internet Retailer*

*Progressive Grocer*

*Supermarket News*

### Agencies & Associations

Food Marketing Institute

Grocery Manufacturers Association

National Frozen & Refrigerated Foods Association

Private Label Manufacturers Association

United States Census Bureau