

Vegetables - US - May 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"The vegetable category remains sizable, though sales are largely driven by consumer interest in lower prices and fresher options. While consumers indicate they would like more vegetables in their diet, data shows they continue to fall short of recommendations, suggesting brands may well have to incorporate novel approaches to garner consumer interest."

- **William Roberts, Jr, Senior Food & Drink Analyst**

This report looks at the following areas:

- Modest growth, bordering on stagnation for the category
- Processed perception among frozen, shelf-stable vegetables
- Consumption falling short of goals

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
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

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Vegetables - US - May 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Definition

Executive Summary

The issues

Modest growth, bordering on stagnation for the category

Figure 1: Total US sales and fan chart forecast of vegetables, at current prices, 2012-22

Processed perception among frozen, shelf-stable vegetables

Figure 2: Correspondence analysis – Descriptions, March 2018

Consumption falling short of goals

The opportunities

Convenient takes on vegetables

Figure 3: Sales of vegetables, by segment, in millions, 2017

New applications for vegetables

Clean/real, a driver for vegetables

Figure 4: TURF analysis – Attributes, March 2018

What it means

The Market – What You Need to Know

After five years of strong growth, stagnation sets in

Vegetable sales largely fresh

Consumers fail to eat enough vegetables

Market Size and Forecast

Largely modest growth in vegetable sales, led by fresher options

Figure 5: Total US sales and fan chart forecast of vegetables, at current prices, 2012-22

Figure 6: Total US sales and forecast of vegetables, at current prices, 2012-22

Market Breakdown

Fresh options dominate category

Figure 7: Total US retail sales and forecast of vegetables, by segment, at current prices, 2012-22

Market Factors

Potential for mounting pesticide concerns

A second organic certification to test

Vegetable consumption lags

Key Players – What You Need to Know

Fresh keeps category steady, as frozen and shelf-stable flounder

Private label posing as local?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Vegetables - US - May 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Processed reputation impacting frozen, shelf-stable vegetables
 Extending vegetable usage occasions

Company and Brand Sales of Vegetables

Private label options see notably stronger sales growth
 Sales of vegetables by company

Figure 8: Multi-outlet sales of vegetables, by leading companies, rolling 52 weeks 2017 and 2018

What's Working?

The power of private label

Figure 9: Private label versus branded vegetable introductions, 2013-17

Figure 10: Claims on vegetable introductions, 2013-17

What's Struggling?

Challenges for non-fresh vegetable options

Figure 11: Notable frozen vegetable introductions, 2017

What's Next?

Novel interpretations of vegetables could flourish, given time

Figure 12: Novel vegetable introductions, 2017

The Consumer – What You Need to Know

Consumers generally adding more vegetables to their diet

Diversity of purchase locations for younger consumers

Price, a strong purchase driver

Notable opportunities for frozen vegetables

Parents notably more likely to turn to vegetables with grains

Price at the expense of provenance?

Vegetable Consumption

Widespread consumption of vegetables

Figure 13: Vegetable consumption, March 2018

Consumers adding more vegetables to their diet

Figure 14: Vegetable consumption trends, March 2018

Younger consumers less likely to eat vegetables

Figure 15: Vegetable consumption, by age, March 2018

Consumption notably less among lower-income consumers

Figure 16: Vegetable consumption, by household income, March 2018

Fresher options resonate notably among Hispanics

Figure 17: Vegetable consumption, by Hispanic origin, March 2018

Purchase Location

Consumers more likely to buy vegetables at supermarkets

Figure 18: Purchase location, March 2018

**BUY THIS
 REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Vegetables - US - May 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Younger consumers purchase from greater variety of retailers

Figure 19: Purchase location, by age, March 2018

Walmart, a notable vegetable resource for lower-income consumers

Figure 20: Purchase location, by household income, March 2018

Cost influencing Hispanic vegetable purchase

Figure 21: Purchase location, by Hispanic origin, March 2018

Purchase Attributes

Consumers strongly considering price

Figure 22: Attributes, March 2018

Organic of stronger interest to younger consumers

Figure 23: Attributes, by age, March 2018

Income factors strongly in price interest

Figure 24: Attributes, by household income, March 2018

Organic claims resonate strongly among Hispanic Millennials

Figure 25: Attributes, by Hispanic origin, March 2018

Notable interest in free-from claims among women

Figure 26: Free-from attributes, by gender and age, March 2018

Figure 27: Free-from attributes, by parental status and gender, March 2018

Flavorful, natural vegetable options hold significant potential

Figure 28: TURF analysis – Attributes, March 2018

Vegetable Descriptions

Fresh options leveraging healthier reputation

Figure 29: Correspondence analysis – Descriptions, March 2018

Behaviors

“Local” options resonate with consumers

Figure 30: Behaviors, March 2018

Local hits close to home

Figure 31: Behaviors, by age, March 2018

Vegetable mixes appealing to parents

Figure 32: Behaviors, by parental status, March 2018

Convenience, health motivating Hispanic Millennials

Figure 33: Behaviors, by Hispanic origin, March 2018

Opinions of Vegetables

Source information of interest to consumers

Figure 34: Opinions of vegetables, March 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com

Vegetables - US - May 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Fan chart forecast

Consumer survey data

Direct marketing creative

Abbreviations

Abbreviations

Appendix – The Market

Figure 35: Total US sales and forecast of vegetables, at inflation-adjusted prices, 2012-22

Figure 36: Total US retail sales and forecast of vegetables, by segment, at current prices, 2012-22

Figure 37: Total US retail sales of vegetables, by segment, at current prices, 2015 and 2017

Figure 38: Total US retail sales and forecast of fresh vegetables, at current prices, 2012-22

Figure 39: Total US retail sales and forecast of fresh vegetables, at inflation-adjusted prices, 2012-22

Figure 40: Total US retail sales and forecast of shelf-stable vegetables, at current prices, 2012-22

Figure 41: Total US retail sales and forecast of shelf-stable vegetables, at inflation-adjusted prices, 2012-22

Figure 42: Total US retail sales and forecast of frozen vegetables, at current prices, 2012-22

Figure 43: Total US retail sales and forecast of frozen vegetables, at inflation-adjusted prices, 2012-22

Figure 44: Total US retail sales and forecast of fresh-cut salad, at current prices, 2012-22

Figure 45: Total US retail sales and forecast of fresh-cut salad, at inflation-adjusted prices, 2012-22

Figure 46: Total US retail sales of vegetables, by channel, at current prices, 2012-17

Figure 47: Total US retail sales of vegetables, by channel, at current prices, 2015 and 2017

Figure 48: US supermarket sales of vegetables, at current prices, 2012-17

Figure 49: US sales of vegetables through other retail channels, at current prices, 2012-17

Appendix – Key Players

Figure 50: Multi-outlet sales of vegetables, by leading companies, rolling 52 weeks 2017 and 2018

Figure 51: Multi-outlet sales of fresh vegetables, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 52: Multi-outlet sales of shelf-stable vegetables, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 53: Multi-outlet sales of frozen vegetables, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 54: Multi-outlet sales of fresh-cut salad, by leading companies and brands, rolling 52 weeks 2017 and 2018

Correspondence Analysis – Methodology

Figure 55: Descriptions, March 2018

TURF Analysis – Methodology

Figure 56: Table – TURF analysis – Attributes, March 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: 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 |

EMAIL: reports@mintel.com