

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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



“The most enthusiastic home cooks, who have both strong interest in cooking from scratch and advanced cooking skills, are a core target for the cookware market and are well-served by top cookware brands and specialty retailers.

While marketers can't ignore this hard-core group, category growth may require a more concerted effort at reaching out to a broader, less highly skilled audience.”

– John Owen, Senior Household Analyst

In this report we answer the key questions:

- Make supermarkets a showcase for cooking and cookware
- Catch the momentum of ethnic cooking
- Break out of the replacement cycle

The \$4.6 billion cookware market has posted small gains over the last few years, roughly keeping pace with modest economic improvement. While pockets of strength exist, such as ethnic cookware and microwave cookware, the slow pace of growth overall indicates that the cookware market is not benefiting as much as it might from continued interest in home meal prep and home entertaining.

The cookware market is driven by a core of home cooks who are enthusiastic about cooking and possess strong cooking skills. More broadly, however, skill often lags enthusiasm. For marketers and retailers, bolstering skill and confidence in the kitchen may represent the best opportunity for boosting sales in the cookware market as a whole.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@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

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Table of Contents

Scope and Themes

What you need to know
Definition
Segmentation definitions and overview
Data sources
Consumer survey data
Abbreviations and terms
Abbreviations
Terms

Executive Summary

The market
Category tracks with slow improvement in economy
Figure 1: Total U.S. retail sales of cookware and fan chart forecast, at current prices, 2008-18
Segments offering specialization and convenience outperform the market
Figure 2: Total U.S. retail sales of cookware, by segment, 2011 and 2013
Discount stores lead sales, specialty stores experience growth
The consumer
Cooking interest and skill drive category purchases
Figure 3: Purchase of cookware, by cooking segments, April 2013
Replacement remains top reason for purchase
Figure 4: Reasons for purchase of cookware/bakeware, April 2013
Easy cleaning and price most important purchase considerations
Figure 5: Attribute importance for cookware and bakeware, very important, April 2013
Attitudes toward cookware and bakeware
Figure 6: Attitudes toward cookware and cooking, agree strongly, April 2013
What we think

Issues and Insights

Make supermarkets a showcase for cooking and cookware
The issues
The implications
Catch the momentum of ethnic cooking
The issues
The implications
Break out of the replacement cycle
The issues
The implications

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Trend Applications

- Trend: Moral Brands
- Trend: Return of the Experts
- Mintel Futures: Old Gold

Market Size and Forecast

Key points

Category tracks with slow improvement in economy

Figure 7: Total U.S. retail sales of cookware, at current prices, 2008-18

Figure 8: Total U.S. retail sales of cookware, at inflation-adjusted prices, 2008-18

Fan chart forecast

Figure 9: Total U.S. retail sales of cookware and fan chart forecast, at current prices, 2008-18

Market Drivers

Household income stabilizes but remains weak

Figure 10: Median household income, in inflation-adjusted dollars, 2001-11

Consumer confidence on the rise

Figure 11: Thomson Reuters/University of Michigan Index of Consumer Sentiment, 2008-13

Renovation market rebounding

Figure 12: BuildFax Remodeling Index, 2008-13

Time spent on home meal prep increasing

Figure 13: Time spent on food preparation and cleanup, by gender, 2007-11

Growing interest in fresh, local foods supports home cooking

Figure 14: Number of farmers markets in the U.S., 1994-2012

Competitive Context

Small kitchen appliances compete for home meal prep budgets

Figure 15: U.S. retail sales of select kitchen appliances, 2008-12

Figure 16: U.S. retail sales of select kitchen appliances, 2008-12 (continued)

More money spent on food at home

Figure 17: Percentage of total food expenditures on food at home and food away from home, 2007-11

Segment Performance

Key points

Specialization and convenience outperform more general products

Figure 18: Total U.S. retail sales of cookware, by segment, 2011 and 2013

Segment Performance – Nonstick Cookware

Key points

Heavily promoted segment a category mainstay

Figure 19: Total U.S. retail sales of nonstick cookware, 2008-18

Segment Performance – Stainless Steel Cookware

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Key points

Stainless sales stagnate but could be set for rebound

Figure 20: Total U.S. retail sales of stainless steel cookware, 2008-18

Segment Performance – Anodized Aluminum Cookware

Key points

Anodized aluminum holds appeal for cooks looking to save time and money

Figure 21: Total U.S. retail sales of anodized aluminum cookware, 2008-18

Segment Performance – Other Cookware

Key points

Beyond reheating: microwave cooking pushes to expand

Ethnic cookware taps into desire for exploration and authenticity

Figure 22: Share of other cookware subsegments, 2008-18

Figure 23: Total U.S. retail sales of other cookware*, 2008-18

Segment Performance – Metal Bakeware

Key points

Bakeware benefits from growing popularity of baking at home

Figure 24: Total U.S. retail sales of metal bakeware, 2008-18

Segment Performance – Cutlery

Key points

Segment gains steadily, may benefit further from shopper education

Figure 25: Total U.S. retail sales of cutlery, 2008-18

Retail Channels

Key points

Discounters maintain lead but face pressure from specialists and online sellers

Figure 26: Total U.S. retail sales of cookware, by retail channel, 2011 and 2013

Retail Channels – Discount Stores and Warehouse Clubs

Key points

Cookware fits Target's cheap-chic strategy

Walmart focuses on basics and low prices

Figure 27: Total U.S. retail sales of cookware in discount stores and warehouse stores, 2011 and 2013

Retail Channels – Specialty Stores

Key points

Specialty stores gain on appeal to enthusiasts

Figure 28: Total U.S. retail sales of cookware in specialty stores, 2011 and 2013

Retail Channels – Department Stores

Key points

Weak sales for category reflect weakness of the channel as a whole

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 29: Total U.S. retail sales of cookware in department stores, 2011 and 2013

Retail Channels – Other Retailers

Key points

Wide variety of channels combine for solid cookware growth

Figure 30: Total U.S. retail sales of cookware in other retailers*, 2011 and 2013

Leading Companies

Groupe SEB (T-Fal and All-Clad Metalcrafters)

Newell Rubbermaid (Calphalon)

Extending the Calphalon brand

Meyer Corporation

Innovations and Innovators

Twizt an effort to redefine convenience

Revolution from Revol first ceramics to work with all heat sources

Calphalon places increasing emphasis on nonstick surfaces

Bakeware innovations that expand possibilities

Marketing Strategies

Overview

All-Clad targets brides-to-be and cooking enthusiasts

Social Media

Key points

Social media metrics

Figure 31: Key performance indicators, June 2013

Market overview

Brand usage and awareness

Figure 32: Usage and awareness of selected cookware brands, April 2013

Interaction with cookware brands

Figure 33: Interaction with selected cookware brands, April 2013

Online conversations

Figure 34: Online conversations on selected cookware brands, by day, May 3-June 2, 2013

Where are people talking about cookware brands?

Figure 35: Online conversations on selected cookware brands, by page type, May 3-June 2, 2013

What are people talking about?

Figure 36: Types of conversations around selected cookware brands, May 3-June 2, 2013

Figure 37: Types of conversations around selected cookware brands, by day, May 3-June 2, 2013

Analysis by brand

Cuisinart

Figure 38: Cuisinart – key social media indicators, June 2013

Key online campaigns

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

What we think

T-Fal

Figure 39: T-Fal – Key social media indicators, June 2013

Key online campaigns

What we think

Le Creuset

Figure 40: Le Creuset – Key social media indicators, June 2013

Key online campaigns

What we think

All-Clad

Figure 41: All-Clad – Key social media indicators, June 2013

Key online campaigns

What we think

Calphalon

Figure 42: Calphalon – Key social media indicators, June 2013

Key online campaigns

What we think

Korin Knives

Figure 43: Korin Knives – Key social media indicators, June 2013

What we think

Purchase of Cookware

Key points

Nearly two thirds of adults have purchased cookware in last two years

High purchase incidence among young adults reflects cooking enthusiasm

Figure 44: Purchase of cookware, by gender and age, April 2013

Upper-middle income group purchases widest array of cookware

Figure 45: Purchase of cookware, by household income, April 2013

Cooking enthusiasm drives purchase of a greater variety of cookware

Figure 46: Purchase of cookware, by cooking segments, April 2013

Purchase of Bakeware and Cutlery

Key points

Women 18-34 are a key market for bakeware and for the category as a whole

Men an important target for cutlery manufacturers and retailers

Figure 47: Purchase of bakeware and cutlery, by gender and age, April 2013

Bakeware purchase incidence skews strongly to larger households

Figure 48: Purchase of bakeware and cutlery, by household size, April 2013

Bakeware and cutlery offer opportunities to enhance enthusiasm and skill

Figure 49: Purchase of bakeware and cutlery, by cooking segments, April 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Reasons for Purchase of Cookware/Bakeware

Key points

Replacement remains top reasons for purchase, keeping sales growth in check

Younger buyers more likely to purchase in order to enhance skills, variety

Figure 50: Reasons for purchase of cookware/bakeware, by gender and age, April 2013

Enthusiastic Cooks represent expansion and trade-up opportunities

Figure 51: Reasons for purchase of cookware/bakeware, by cooking segments, April 2013

Attribute Importance for Cookware and Bakeware

Key points

Easy cleaning and price most likely to be rated very important

Consumer reviews carry more weight than professionals and celebrities

Figure 52: Attribute importance for cookware and bakeware, April 2013

Women 55+ especially attuned to convenience, practicality

Reviews of all types essential for young adults

Figure 53: Very important attribute for cookware and bakeware, by gender and age, April 2013

Enthusiastic and Super-enthusiastic Cooks motivated by more attributes

Figure 54: Very important attribute for cookware and bakeware, by cooking segments, April 2013

Attitudes Toward Cookware and Cooking

Key points

The right cookware facilitates healthy eating

Pleasing family and friends a powerful emotional driver for home cooking

Interest in new recipes a potential motivation for cookware purchases

Figure 55: Attitudes toward cookware and cooking, April 2013

Women appreciate social aspects of cooking, men the equipment

Figure 56: Strongly agree with attitudes toward cookware and cooking, by gender and age, April 2013

Satisfaction on a number of fronts for most enthusiastic cooks

Figure 57: Strongly agree with attitudes toward cookware and cooking, by cooking segments, April 2013

Impact of Race and Hispanic Origin

Hispanics more likely to have made cookware purchases in last two years

Figure 58: Purchase of cookware, by race/Hispanic origin, April 2013

Hispanics more likely to have made bakeware and cutlery purchases

Figure 59: Purchase of bakeware and cutlery, by race/Hispanic origin, April 2013

Replacement the top purchase motivation for all groups

Figure 60: Reasons for purchase of cookware/bakeware, by race/Hispanic origin, April 2013

Black and Hispanic cookware shoppers especially attuned to value

Figure 61: Very important attribute for cookware and bakeware, by race/Hispanic origin, April 2013

Black, Hispanic, and Asian cooks highly engaged in cookware and cooking

Figure 62: Strongly agree with attitudes toward cookware and cooking, by race/Hispanic origin, April 2013

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Cluster Analysis

Figure 63: Target clusters, April 2013

Old Pros

Demographics

Characteristics

Opportunity

Super Cooks

Demographics

Characteristics

Opportunity

No-nonsense Cooks

Demographics

Characteristics

Opportunity

Disengageds

Demographics

Characteristics

Opportunity

Cluster characteristic tables

Figure 64: Cooking frequency, attitude, and skill level, by target clusters, April 2013

Figure 65: Cooking segments, by target clusters, April 2013

Figure 66: Purchase of cookware, by target clusters, April 2013

Figure 67: Purchase of bakeware and cutlery, by target clusters, April 2013

Figure 68: Reasons for purchase of cookware/bakeware, by target clusters, April 2013

Figure 69: Very important attribute for cookware and bakeware, by target clusters, April 2013

Figure 70: Strongly agree with attitudes toward cookware and cooking, by target clusters, April 2013

Cluster demographic tables

Figure 71: Target clusters, by demographic, April 2013

Cluster methodology

Custom Consumer Groups

Gender and presence of children younger than 18

Kids at home have greater impact on men's purchases than women's

Figure 72: Purchase of cookware, by gender and presence of children in household, April 2013

Figure 73: Purchase of bakeware and cutlery, by gender and presence of children in household, April 2013

Women, with or without kids, more likely to place importance on attributes

Figure 74: Very important attribute for cookware and bakeware, by gender and presence of children in household, April 2013

Women with kids appreciate social and emotional aspects of home cooking

Figure 75: Strongly agree with attitudes toward cookware and cooking, by gender and presence of children in household, April 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Appendix – Behaviors and Attitudes Define Six Types of Cooks

Figure 76: Cooking frequency, attitude, and skill level, by cooking segments, April 2013

Cooking segment demographics

Figure 77: Cooking segments, by gender and age, April 2013

Figure 78: Cooking segments, by household income, April 2013

Figure 79: Cooking segments, by household size, April 2013

Figure 80: Cooking segments, by race/Hispanic origin, April 2013

Appendix – Cooking Frequency, Attitude, and Skill Level

Figure 81: Cooking frequency, attitude, and skill level, by gender and age, April 2013

Figure 82: Cooking frequency, attitude, and skill level, by household income, April 2013

Figure 83: Cooking frequency, attitude, and skill level, by household size, April 2013

Figure 84: Cooking frequency, attitude, and skill level, by race/Hispanic origin, April 2013

Appendix – Other Useful Consumer Tables

Purchase of cookware

Figure 85: Purchase of cookware, by household size, April 2013

Purchase of bakeware and cutlery

Figure 86: Purchase of bakeware and cutlery, by household income, April 2013

Reasons for purchase of cookware and bakeware

Figure 87: Reasons for purchase of cookware/bakeware, by household income, April 2013

Figure 88: Reasons for purchase of cookware/bakeware, by household size, April 2013

Attribute importance for cookware and bakeware

Figure 89: Very important attribute for cookware and bakeware, by household income, April 2013

Figure 90: Very important attribute for cookware and bakeware, by household size, April 2013

Attitudes toward cookware and cooking

Figure 91: Strongly agree with attitudes toward cookware and cooking, by household income, April 2013

Figure 92: Strongly agree with attitudes toward cookware and cooking, by household size, April 2013

Appendix – Social Media

Brand usage or awareness

Figure 93: Brand usage or awareness, April 2013

Figure 94: Le Creuset usage or awareness, by demographics, April 2013

Figure 95: Cuisinart usage or awareness, by demographics, April 2013

Figure 96: T-Fal usage or awareness, by demographics, April 2013

Figure 97: Calphalon usage or awareness, by demographics, April 2013

Figure 98: All-Clad usage or awareness, by demographics, April 2013

Figure 99: Korin Knives usage or awareness, by demographics, April 2013

Activities done

Figure 100: Activities done, April 2013

Figure 101: Le Creuset – Activities done, by demographics, April 2013

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: oxygen@mintel.com

Cookware - US - July 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 102: Cuisinart – Activities done, by demographics, April 2013

Figure 103: T-Fal – Activities done, by demographics, April 2013

Figure 104: Calphalon – Activities Done, by demographics, April 2013

Online conversations

Figure 105: Online conversations on selected cookware brands, May 3-June 2, 2013

Figure 106: Online conversations on selected cookware brands, by day, May 3-June 2, 2013

Figure 107: Online conversations on selected cookware brands, by page type, May 3-June 2, 2013

Figure 108: Types of conversations around selected cookware brands, May 3-June 2, 2013

Figure 109: Types of conversations around selected cookware brands, by day, May 3-June 2, 2013

Figure 110: Types of conversations around selected cookware brands, by page type, May 3-June 2, 2013

Appendix – Trade Organizations

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com