

Report Price: £3085.18 | \$3995.00 | €3666.43

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



"Cookware sales have remained slow amid high household penetration, yet steady growth is likely attributed to consumers' generally positive attitudes toward cooking and baking at home."

- Rebecca Cullen, Home & Personal Care Analyst

## This report looks at the following areas:

- Universal household penetration leads to slow market growth
- Shifts in cooking and baking habits present challenges
- Convenience, selection drive retailer selection

While adults find health and creative benefits to the process, there is interest in furthering their skills in the kitchen and expanding their inventory pointing to market growth potential.

# BUY THIS REPORT NOW

**VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

#### Universal household penetration leads to slow market growth

Figure 1: Cookware, bakeware, cutlery ownership, April 2016-17

#### Shifts in cooking and baking habits present challenges

Figure 2: Cooking and baking frequency, April 2016-17

#### Convenience, selection drive retailer selection

Figure 3: Importance of selection, convenience, and value-added experiences when selecting a retailer, by age, April 2017

#### The opportunities

#### Tap into younger adults interest in improving skills, growing inventory

Figure 4: Select attitudes and behaviors toward cooking and baking, by age, April 2017

#### Experiential retail piques consumer interest

Figure 5: Interest in value-added retailer experiences, April 2017

## Emphasize health aspects to reach broad audience

Figure 6: Perceptions of cooking at home being healthy, by gender, age, April 2017

What it means

## The Market - What You Need to Know

Cookware sees modest growth, reaching \$5.1 billion in 2017

Subscription services, health, and hygge impact cooking

Dining out spend encroaches on eating in, cost of groceries falling

#### **Market Size and Forecast**

## Cookware sales see slow, but stable growth

Figure 7: Total US sales and fan chart forecast of cookware market, at current prices, 2012-22

Figure 8: Total US retail sales and forecast of cookware, at current prices, 2012-22

## **Market Breakdown**

#### Nonstick cookware accounts for nearly one third of category, sees growth

Figure 9: Total US retail sales of cookware, by segment share, 2017

Figure 10: Total US retail sales of cookware, by segment, at current prices, 2015 and 2017

## Sales mainly occur within supercenters, warehouse clubs

Figure 11: Total US retail sales of cookware, by channel, at current prices, 2015 and 2017

#### **Market Perspective**

Subscription services revive cooking enthusiasm

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

#### Space conscious living is a growing trend

Figure 12: Repertoire of cookware ownership, by living location, April 2017

Americans search for hygge could end in the kitchen

#### **Market Factors**

Americans pursue health while obesity rates continue to rise

Presence of children, income impacts ownership, cooking habits

Figure 13: Households, by presence of related children, 2006-16

At-home and out-of-home spending on food continues to rise

Figure 14: Food sales, at home and away from home, January 2003-June 2016

Groceries becoming more affordable

Figure 15: Consumer price index, food at home, seasonally adjusted, August 2015-16

#### **Key Players - What You Need to Know**

Ceramic gaining popularity, social media generates enthusiasm

Department stores lack relevance for category shoppers

Brands get patriotic, commit to health, and get smarter

#### What's Working?

Garden-to-table

Ceramic pans tackle all cooking and baking needs

In-store shopping experience remains important

Social media encourages cooking and baking

#### What's Struggling?

Department stores see softness amid current retail climate

A focus on convenience and color could benefit cutlery

Anodized aluminum cookware, metal bakeware continue to struggle

Figure 16: Total US retail sales of anodized aluminum cookware and metal bakeware, at current prices, 2015 and 2017

#### What's Next?

2017 design trends attract shoppers attention

Le Creuset expands from iconic Dutch ovens

Brands partner for commitment to health

Made in the USA

Cook smarter, not harder

Figure 17: Hestan Cue

Figure 18: Google Home now provides step-by-step recipe instructions, April 26, 2017

### The Consumer - What You Need to Know

Universal household penetration of cookware

Bakeware and cutlery ownership levels hold steady

Cooking and baking frequency remains relatively unchanged

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

#### Mass channels most shopped for category purchases

Convenience, wide assortment key for retailers

The good outweighs the bad when cooking and baking at home

#### **Cookware Ownership**

#### Cookware ownership nearly universal

Figure 19: Cookware ownership, April 2016-17

### Older adults, parents own wider range of cookware

Figure 20: Ownership of select cookware, by age, parental status, April 2017

Figure 21: Repertoire of cookware ownership, by demographics, April 2017

#### Multicultural adults seek ethnic cookware

Figure 22: Ownership of select cookware, by race and Hispanic origin, April 2017

#### Income, home ownership tied to cookware ownership

Figure 23: Ownership of select cookware, by household income, primary residence, April 2017

Figure 24: Repertoire of cookware ownership, by household income, primary residence, April 2017

#### **Bakeware and Cutlery Ownership**

#### Ownership holds steady

#### Bakeware

## Cutlery

Figure 25: Bakeware and cutlery ownership, April 2016-17

#### Bakeware, cutlery ownership skews toward older adults, non-Hispanics

Figure 26: Bakeware ownership, by age, Hispanic origin, April 2017

Figure 27: Cutlery ownership, by age, Hispanic origin, April 2017

## Residency, income impact bakeware, cutlery ownership

Figure 28: Select bakeware and cutlery ownership, by household income, primary residence, April 2017

## **Cooking and Baking Frequency**

## Adults becoming slightly less involved with cooking and baking

Figure 29: Cooking and baking frequency, April 2016-17

## Men becoming more engaged in the kitchen

Figure 30: Cooking frequency, by gender, April 2017

## Adults aged 18-44 increasing their at-home cooking and baking

Figure 31: Cooking and baking frequency, by age, April 2017

## Kids influence cooking and baking frequency

Figure 32: Cooking and baking frequency, by parental status, April 2017

## Renters, urban dwellers becoming increasingly present in kitchen

Figure 33: Cooking and baking more than a year ago, by primary residence, living location, April 2017

#### **Retailers Shopped**

## Mass merchandisers the top channel, regardless of segment

Online reaches shoppers, faces challenges

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 34: Retailers shopped, by segment, April 2017

#### Regardless of income, mass merchandisers are primary shopping destination

Figure 35: Retailers shopped (any segment - Net), by household income, April 2017

#### Young adults shop low price, convenient retailers

Figure 36: Select retailers shopped for cookware and cutlery, by age, April 2017

Figure 37: Select retailers shopped, by segment, by race and Hispanic origin, April 2017

#### **Retailer Selection Factors**

#### Selection and convenience hold the most importance

#### Enhanced retailing piques interest

Figure 38: Retailer selection factors, April 2017

#### Selection, convenience, and assortment could reach a majority

Figure 39: TURF Analysis - Retailer selection factors, April 2017

#### TURF Methodology

#### Retailers can differentiate on experiences to reach younger adults, parents

Figure 40: Retailer selection factors, by age, parental status, April 2017

#### Value-added retail experiences could reach multicultural adults

Figure 41: Select retailer selection factors, by race and Hispanic origin, April 2017

## **Cooking and Baking Attitudes and Behaviors**

#### Benefits of cooking and baking at home outweigh negatives

Figure 42: Cooking and baking attitudes and behaviors, April 2017

## Gender, lifestage impact attitudes toward cooking

Figure 43: Select cooking and baking attitudes and behaviors, by gender and age, parental status, April 2017

## Space can be an issue for Hispanic adults

Figure 44: Select attitudes and behaviors about cookware storage and display, by Hispanic origin, April 2017

#### **Appendix - Data Sources and Abbreviations**

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

#### Appendix - The Market

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

#### Market Breakdown

Figure 46: Total US retail sales and forecast of cookware, by segment, at current prices, 2012-22

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

Figure 48: Total US retail sales and forecast of nonstick cookware, at current prices, 2012-22

Figure 49: Total US retail sales and forecast of stainless steel cookware, at current prices, 2012-22

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



Report Price: £3085.18 | \$3995.00 | €3666.43

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

Figure 50: Total US retail sales and forecast of anodized aluminum cookware, at current prices, 2012-22

Figure 51: Total US retail sales and forecast of other cookware\*, at current prices, 2012-22

Figure 52: Total US retail sales and forecast of metal bakeware, at current prices, 2012-22

Figure 53: Total US retail sales and forecast of cutlery, at current prices, 2012-22

#### Retail channels

Figure 54: Total US retail sales of cookware, by channel, at current prices, 2012-17

Figure 55: Total US retail sales of cookware, by channel, at current prices, 2015 and 2017

#### Market factors

Figure 56: Median household income, by race/Hispanic origin of householder, in inflation-adjusted dollars, 2005-15

#### **Appendix - The Consumer**

Figure 57: Retailers shopped (net - Any segment), April 2017

Figure 58: Social media usage, March 2017

**EMAIL:** reports@mintel.com