

# DRY HIDDEN



# VALLEY RANCH



# **Gen Z brings their own seasoning to restaurants.**

## **We don't even make it to their kitchen.**



**1 in 4 Millennials and Gen Z now carry condiments with them everywhere - treating seasonings like social currency. They're snack-forward, air-fryer natives exploring 'swicy' flavor fusions on TikTok. But Hidden Valley Dry Ranch? Still positioned as your mom's salad dressing mix.**

# Convenience Cravers

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Digital



Busy lifestyle



Health conscious

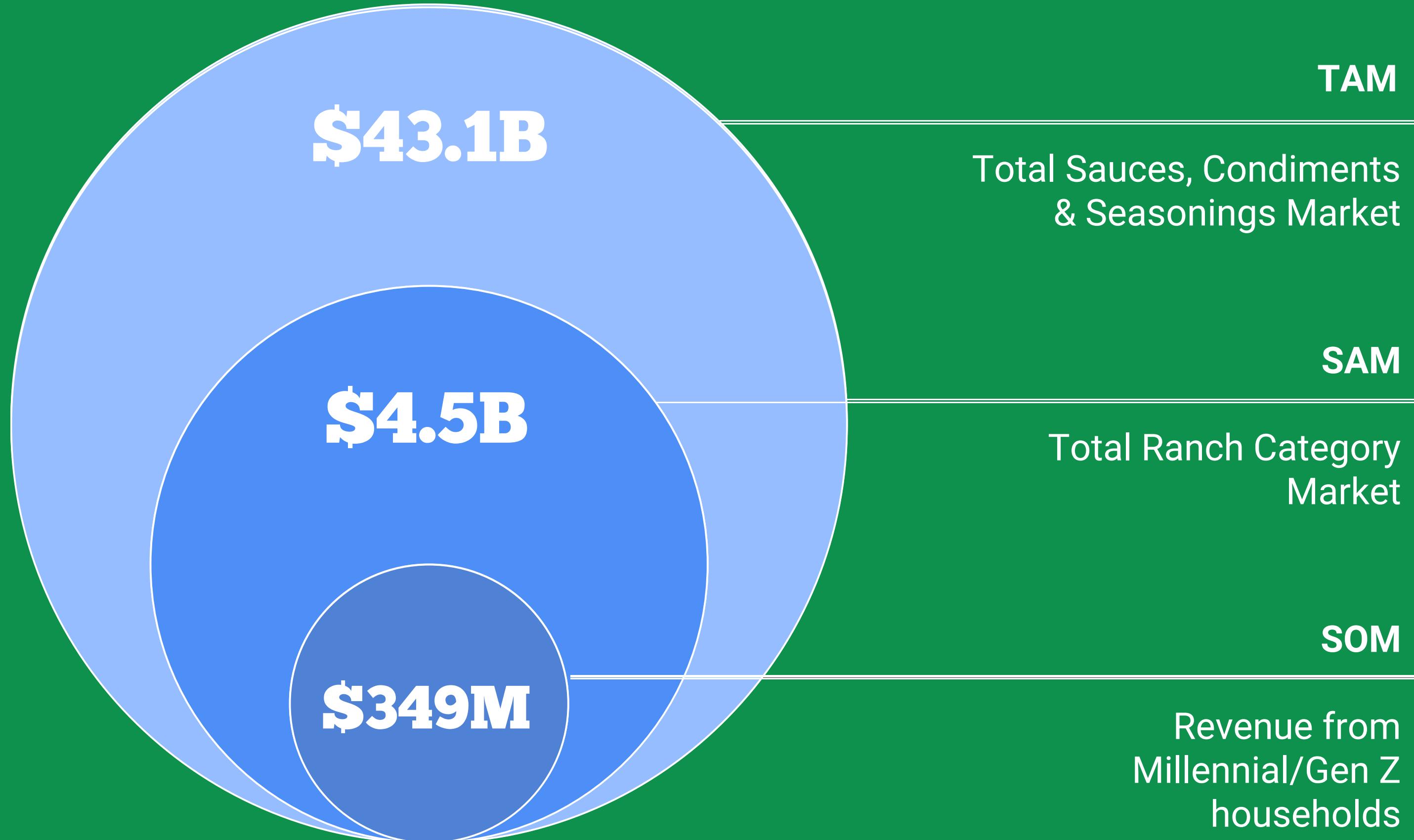
# Positioning Statement

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**For snack-forward Millennials and Gen Z who crave bold, instant flavor on everything they eat, Hidden Valley Dry Ranch is the versatile seasoning that transforms any food, anywhere - from air-fried snacks to hiking trails to office lunches. Unlike competitors chasing flavor variety, we're the one authentic, healthy, convenient seasoning worth carrying everywhere.**

# The "Convenience Craver" Opportunity

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# Redesign packaging to be clearer





Placing the ranch next to snacks,  
meal kits and on-the-go foods like  
popcorn can promote sales



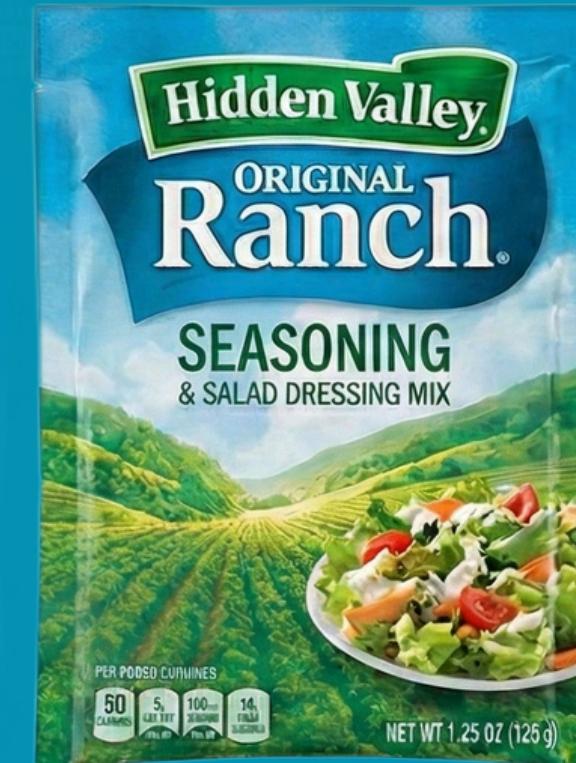
# “Pocket Ranch Challenge” micro-influencer challenge



# Reimagining the packaging

**Smaller packets are ideal for new families and younger people to carry anywhere in pocket and use**

**Current price:  
\$11.49/8 oz  
shaker**



**\$1/1.25 oz packet**



**\$6/4 oz shaker**



**\$15/3 bottle pack**

# Summary of Plan

- Redesign Packaging
- New product shelf placement
- Influencer Marketing
- New and Bundle Pricing

# Appendix

Metric	Value Used	Source / Citation	Notes & Methodology
TAM	**\$36.1 B**	MarkNtel Advisors(US Sauces, Dressings & Condiments Market Report, 2024)	We used the specific US market size for 2024 to ensure we are targeting total "Flavor" wallet share, not just dressing.
SAM	\$4.0 - \$4.5 B	IGA / NielsenIQ Data(Independent Grocers Alliance Category Insights)	IGA reports Ranch sales are ~\$4B annually. This aligns with Mordor Intelligence data showing Ranch holds ~21% of the total Dressing market.
SOM (Share)	70%	Case Fact(Provided in Prompt)	Hard Constraint. We accepted the case fact that Hidden Valley holds 70% share of the Dry Salad Dressing category.
Behavior	39%	HelloFresh("State of Home Cooking" Report, 2025)	The "Semi-Homemade" Proxy: The report found 39% of home cooks use "shortcuts" (mixes, pre-made sauces) weekly. This is the exact behavior of our target user.
Appliance	60%	Circana / Nestlé(Kitchen Audit Data, 2024)	Circana (formerly NPD Group) reports Air Fryer penetration is "nearly two-thirds" (~60%) in US households, validating the hardware availability for this use case.

# The SOM Calculation (The Math)

The "Power User" Equation Logic: Identifying the intersection of Demographic (Youth), Behavior (Snacking), and Brand Strength (70% Share).

## Step A: The Household Base

- Metric: US Households headed by Millennials or Gen Z.
- Data: 52 Million Households (~40% of US).
- Source: US Census Bureau / Statista.

## Step B: The Behavior Filter

- Metric: "Snack-Forward" eaters who replace meals with snacks (e.g., air fryer wings/fries).
- Data: 60% Penetration.
- Source: Mondelez State of Snacking Report 2024 (Gen Z snacks 2x more than Boomers).
- **Target Audience:**  $52M \times 60\% = 31.2$  Million Households

## Step C: The Wallet Share

- Metric: Annual Spend per Household.
- Data: \$16.00 per Year (4 Units @ \$4.00 blended avg price).
- Logic: Assumes quarterly purchase frequency for seasoning usage (higher than dressing usage).

## Step D: The Capture Rate

- Metric: Hidden Valley Market Share.
- Data: 70% Share (Case Fact).
- Logic: Millennials are "brand obsessed" but "search lazy." If the viral recipe says "Hidden Valley," they buy Hidden Valley. We apply our dominant category share directly.

# SOM Calculation Evidence Sheet

Row	Variable	Value Used	Data Source	Evidence / Logic
1	Total US Households	131.0 M	US Census Bureau (2023/24 Estimate)	The standard baseline for US residential units.
2	Target Demographic	40%	Statista / Pew Research	Population Shift: Millennials and Gen Z now head approx. 40% of US households (~52M HHs).
3	Behavioral Filter	60%	Mondelez ("State of Snacking" Report 2024)	The "Snack Meal": 60% of this demographic prefers "many small meals" (snacking) over standard meals. This validates the high-frequency use case.
4	Addressable HHs	31.2 M	Calculation	(Row 1 × Row 2 × Row 3) = The specific number of homes that are both young and snack-forward.
5	Frequency	4 Units/Yr	Strategic Estimate	Usage Proxy: Based on "Pantry Staple" behavior (buying 1 shaker/packet quarterly). Higher than dressing (liquid) but lower than salt.
6	Unit Price	\$4.00	Retail Audit (Target, Walmart, Kroger)	Blended Average: Conservative mix of Single Packets (\$2.29) and 8oz Shakers (\$9.49). Assumes most users start small.
7	Annual Wallet Share	\$16.00	Calculation	(Row 5 × Row 6). This is the revenue value of one loyal household per year.
8	Market Share	70%	Case Fact (Provided in Prompt)	Hard Constraint: We accepted the case data that Hidden Valley holds 70% of the Dry Salad Dressing category.
9	Final SOM	\$349.4 M	Calculation	(Row 4 × Row 7 × Row 8).