Adults claimed the lunchbox.

The frozen PB&J category built its billion-dollar base on kids' lunches, but the conversation has outgrown that origin story. Across 20K mentions of the category, adult self-consumption - driven by athletes, gym-goers, busy professionals, and nostalgic millennials - now sits alongside the parent occasion as a co-equal driver of demand. New entrants are arriving precisely because that adult signal is visible and growing, and the window to shape how the category is defined for grown-up consumers is open right now.

20K	+35%	49%	14%
TOTAL MENTIONS	NET SENTIMENT	POSITIVE SENTIMENT	NEGATIVE SENTIMENT
of Frozen PB&J Sandwiches	positive minus negative	of verified sample	of verified sample

PREPARED FOR	DATA PERIOD	SURFACES	RECORDS
CPG	July 2025 - July 2026	Social platforms	20K

- 00 EXECUTIVE SUMMARY - ONE PAGE

Adults claimed the lunchbox.

The frozen PB&J category is no longer a single-occasion product. Smucker's Uncrustables commands **20K total mentions** and a **net positive sentiment of +35%** - a category-health baseline that most CPG brands would envy - but the more consequential story inside that number is structural: the conversation has bifurcated into a durable parent-and-child lane and a fast-expanding adult self-consumption lane, with the latter now pulling in athletes, fitness-minded consumers, nostalgic millennials, and busy professionals who never stopped eating these sandwiches but are only now talking about it publicly. New entrants, most visibly Jams with its high-protein positioning, are entering specifically to address the adult lane's unmet needs around protein content and grown-up credibility - not to compete for lunchboxes. The window for Smucker's to define what adult frozen PB&J means, on its own terms, is open but will not stay open indefinitely.

WHAT THE DATA SHOWS

The adult consumption occasion is real, documented, and structurally distinct from the parent-driven lunchbox lane.

The largest theme in the dataset - **11.8K mentions** - captures Uncrustables as a cultural and lifestyle object consumed across age groups, settings, and activities, from gym bags to golf courses to airport security lines. Athletes and Division I football players appear explicitly as recurring consumer archetypes, and the NFL narrative surfaces as a documented consumption driver, not just a meme. [Earned T1] [Earned T5 S1]

IMPLICATION The adult occasion is not a brand invention waiting to be marketed into existence - it already exists and is generating organic conversation at scale. The investment question is therefore not whether to pursue it, but how fast and through which vectors.

Protein and nutrition are the primary friction points separating enthusiastic adult consumers from reluctant ones.

Across nutrition-focused themes, consumers praise the calorie-dense, carbohydrate-and-protein profile for active use cases while simultaneously flagging high sugar content and the absence of a more protein-forward option as reasons to seek alternatives or make homemade versions. The emergence of Jams as a **high-protein competitor** is noted directly alongside Uncrustables in athlete-context conversations, signaling that the unmet need is already being addressed by a rival. [Earned T7] [Earned T5]

IMPLICATION The protein gap is the single most actionable product-level insight in this dataset - it is simultaneously a consumer complaint, a competitive opening being exploited, and a clear brief for Smucker's innovation pipeline.

The Trader Joe's lawsuit generated the category's highest-negativity moment, concentrating reputational risk in a legal narrative rather than a product narrative.

The trademark infringement suit against Trader Joe's produced a standalone theme of **848 mentions** at **69% negative sentiment** - the most negative signal in the entire dataset - and a second cluster of **1,036 mentions** reinforcing the same story. Consumer reaction skews toward sympathy for Trader Joe's and skepticism toward Smucker's, framing the brand as protecting monopoly rather than protecting quality. [Earned T4] [Earned T1 S3 C1]

IMPLICATION The lawsuit narrative is the loudest negative signal in an otherwise healthy conversation, and its framing - incumbent brand suppressing competition - directly undermines any positioning move that requires Smucker's to be seen as an open, culturally confident brand rather than a defensive one.

Convenience and nostalgia are the category's emotional foundation, and they work equally hard for children and adults.

The second-largest theme - **2,994 mentions at 81% positive sentiment**, the highest positivity rate in the dataset - is built almost entirely on convenience, portability, and nostalgic appeal, with reviewers across age groups citing these qualities without prompting. The frozen-preference behavior (consuming them semi-frozen for texture and refreshment) appears as its own documented phenomenon with **1,040 mentions**, suggesting a sensory ritual that transcends the lunchbox context entirely. [Earned T2] [Earned T3]

IMPLICATION Nostalgia and convenience are not soft brand values - they are load-bearing pillars of why adults are returning to or staying with this product, and any adult-targeted positioning that abandons them in favor of pure performance messaging would be leaving its strongest equity on the table.

STRATEGIC TAKEAWAY

The adult frozen PB&J opportunity is durable, sizable, and already in motion - the only open question is who shapes it. Smucker's holds every structural advantage: brand recognition, distribution scale, the emotional equity of nostalgia, and a documented adult consumer base that is self-organizing around the product. The risk is not that the adult occasion fails to materialize - it already has. The risk is that Smucker's cedes the adult narrative to Jams on protein, to Trader Joe's on value, and to homemade culture on authenticity, while the brand continues to speak primarily to parents packing lunchboxes.

- 01 THE BRIEF & THE DATA

What was asked, what was analyzed.

This report was commissioned to answer a specific investment question: is the adult frozen PB&J opportunity durable and sizable enough to justify positioning, innovation, or market-entry investment, and which consumer segments and messaging territories offer the clearest path in before the category consolidates? Four supporting questions structure the analysis - how the conversation splits between the kids occasion and adult self-consumption and whether that mix has shifted; what role the NFL and athlete narrative plays as a genuine consumption driver versus a cultural meme; how new entrants are being received and on what dimensions consumers are comparing them to Uncrustables; and what unmet needs surface as differentiation opportunities.

The corpus covers **20K total mentions** (verified sample: **20K**) collected via a Boolean query built around three brand pillars - Smucker's Uncrustables, Welch's PB&J entry, and Jams - plus generic category terms, all filtered to require proximity to context terms such as frozen, sandwich, lunch, snack, lunchbox, school lunch, breakfast, or on the go. The data spans **July 2025 through July 2026** and is drawn entirely from public online conversation across social platforms. Because the query required category-context proximity, the dataset is tightly scoped to frozen PB&J discussion and is not a general peanut butter or jelly conversation; all claims in this report should be read against that scope.

The conversation is heavily concentrated: the top theme alone accounts for **11.8K mentions**, or roughly **59%** of total volume, and the top two themes together represent nearly **73%** of all mentions. Fifteen themes were identified in the earned stream, ranging from core product and cultural conversation to legal news, CPG industry trends, and peripheral content (travel snack tips, hospitality reviews) that entered the dataset via the brand's cultural ubiquity. Overall sentiment registers at **net positive +35%**, with **49% positive** and **14% negative** across the verified sample - a healthy baseline with one concentrated negativity spike tied to the Trader Joe's trademark lawsuit, which produced the dataset's single most negative theme at **69% negative sentiment**. The adult-occasion and athlete narratives, the competitive entry of Jams, the homemade-alternative movement, and the protein-gap friction point are the four dynamics that most directly bear on the business objective and are developed in the findings that follow.

Two audiences, one product, diverging needs.

The frozen PB&J conversation does not belong to one consumer type. The data reveals two structurally distinct audiences - parents managing children's meals and adults consuming for their own reasons - operating in the same conversation space but motivated by different needs, using different language, and responding to different triggers. Understanding where they overlap and where they diverge is the foundation of any positioning or product decision.

The parent-and-child occasion remains the category's volume anchor, but its conversation is functional rather than passionate.

The largest cluster of family-driven conversation - **704 mentions** - centers on bulk purchase from Costco, Walmart, and Sam's Club, weekly grocery hauls, and school lunch planning, with Uncrustables appearing as a reliable, low-effort staple rather than a product people feel strongly about. A parallel cluster of **317 mentions** documents the same grocery-haul and meal-planning behavior, confirming it as a consistent, high-frequency but low-emotion purchase pattern. [Earned T1 S2 C1] [Earned T1 S2 C3]

IMPLICATION The lunchbox occasion is sticky and high-volume, but its emotional temperature is low - it is a habit, not a passion point. That means it is vulnerable to private-label substitution (as the Trader Joe's situation illustrates) and will not generate the earned cultural currency that the adult occasion already is.

Adult self-consumption is the category's growth conversation, driven by convenience, nostalgia, and a documented fitness use case.

Division I football players and NFL athletes appear as explicit consumer archetypes in **260 mentions** that track Uncrustables as a performance-adjacent snack - calorie-dense, portable, and fast - rather than a children's food. Separately, adult consumers describe eating them frozen as a sensory preference, using them as travel snacks, and incorporating them into outdoor and athletic activities across multiple clusters totaling well over **1K mentions**. [Earned T5 S1] [Earned T3 S1] [Earned T1 S4]

IMPLICATION The NFL and athlete narrative is not a meme that inflated a number - it is a documented consumption driver that has given adult consumers a socially legible reason to eat a product they might otherwise have dismissed as a kid's food. That permission structure is genuinely valuable and worth extending beyond the NFL context.

The frozen-eating ritual is a distinct adult behavior that the brand has not formally claimed.

A dedicated theme of **1,040 mentions at 62% positive sentiment** documents consumers who actively prefer Uncrustables in a frozen or semi-frozen state, describing the texture as ice cream-adjacent and the experience as refreshing rather than merely convenient. This behavior appears across age groups but is most vocally celebrated by adult consumers, and it surfaces independently of the lunchbox occasion - people are eating these frozen by choice, not by default. [Earned T3] [Earned T1 S4 C1]

IMPLICATION A product ritual this specific and this organic is rare brand equity - it is a consumption behavior that consumers invented and are evangelizing without any brand prompting. Formalizing it as a brand-endorsed eating occasion would cost almost nothing and would give adult consumers a shared identity marker that the lunchbox framing cannot provide.

PLANNER'S TAKEAWAY

The adult occasion is not emerging - it has already emerged, and it is self-sustaining. The question for Smucker's is not whether to acknowledge adult consumers but whether to lead that conversation or let competitors and organic culture define it without brand input. The frozen-eating ritual, the athlete permission structure, and the nostalgia equity are all in place; what is missing is a brand voice that speaks to adults as the primary audience rather than as an afterthought to the lunchbox.

- 03 FINDINGS - COMPETITION & CATEGORY PRESSURE

New entrants target the gap Smucker's left open.

The category's competitive dynamics are shifting in a specific direction: new entrants are not trying to out-convenience Uncrustables on the lunchbox occasion - they are targeting the protein and adult-credibility gap that Smucker's has not formally addressed. The data captures both the competitive entry and the consumer reception, and the pattern is clear enough to inform near-term positioning decisions.

Jams is entering directly through the athlete and protein lane that Smucker's has left undefended.

In a story of **232 mentions** explicitly framed as NFL snack competition, Jams is described as a high-protein alternative to Uncrustables, positioned alongside - and in direct comparison to - the incumbent brand in athlete-context conversations. The theme covering competition and philanthropy (**540 mentions at 53% positive**) documents Jams' emergence as the most notable competitive signal in the dataset, appearing specifically in the contexts where adult and athlete consumers are most active. [Earned T5 S2] [Earned T5]

IMPLICATION Jams is not competing on convenience or nostalgia - it is competing on the one dimension where Uncrustables is most vulnerable with adult consumers. If Smucker's does not address the protein gap through product innovation or messaging, it risks ceding the athlete and fitness-minded adult segment to a challenger brand that has already named its target.

Homemade alternatives represent a structural competitive pressure that no single brand can fully counter.

A story of **806 mentions** documents the DIY Uncrustables trend - consumers using specialized cutters and sealers to replicate the product at home - driven primarily by cost concerns and a desire for ingredient control. This behavior is framed as a cost-effective alternative, not a rejection of the product concept, and it surfaces most strongly among parents and health-conscious adults who value the format but push back on the price and ingredient list. [Earned T1 S5] [Earned T6]

IMPLICATION The homemade movement is a price and ingredient signal, not a brand rejection - consumers who make their own versions are telling the brand exactly what they want: the same format with cleaner ingredients and better value. That is a product brief, not just a social media trend.

The Trader Joe's lawsuit concentrated reputational damage in a narrative that frames Smucker's as a monopoly protector.

The trademark infringement suit generated **848 mentions at 69% negative sentiment** - the sharpest negativity concentration in the entire dataset - with the dominant consumer framing positioning Smucker's as using legal force to suppress a smaller, beloved competitor rather than competing on product merit. A cluster of **1,036 mentions** amplified the same story, making it the single largest discrete event in the earned conversation. [Earned T4] [Earned T1 S3] [Earned T1 S3 C1]

IMPLICATION In a category where the brand needs to be seen as culturally open and adult-friendly to capture the new occasion, a narrative that positions it as a defensive incumbent is actively counterproductive - it is the single most urgent reputational issue in the data and deserves a strategic communications response, not just legal management.

- 04 FINDINGS - PRODUCT SIGNALS & INNOVATION TERRITORY

What consumers are asking for, in their own words.

Across the corpus, consumers signal unmet needs through three consistent behaviors: seeking alternatives, making their own versions, and praising a specific product attribute (the protein-enhanced SKU) in terms that suggest it is undersupplied relative to demand. These signals, taken together, constitute a product innovation brief that the data has already written.

The protein-enhanced Uncrustables SKU is generating disproportionate positive attention relative to its apparent distribution and awareness.

The protein variant appears across multiple themes - including the core product review theme (**2,994 mentions at 81% positive**) and the nutrition theme (**439 mentions**) - as a specific callout that satisfies adult consumers who want the convenience format without the nutritional compromise. References to it appear in the same breath as Jams comparisons, suggesting consumers are actively using it as a benchmark when evaluating the competitive field. [Earned T2] [Earned T7] [Earned T4]

IMPLICATION A product that consumers are already recommending to each other as a solution to the category's main friction point is a marketing asset that is currently underleveraged - broader distribution, clearer labeling, and targeted adult-occasion messaging around the protein SKU could convert existing organic advocacy into a volume driver.

Flavor variety and format expansion are secondary but consistent consumer requests across the product conversation.

Across the core product clusters - including a cluster of **480 mentions** specifically noting enthusiasm for various flavors beyond the classic PB&J - consumers express interest in expanded flavor options, toasted and waffled preparations, and refrigerator-friendly formats alongside the frozen SKU. The CPG industry trends theme (**205 mentions**) contextualizes this within a broader pattern of health-and-convenience innovation rewarding brands that expand their format range. [Earned T1 S1 C4] [Earned T11] [Earned T14]

IMPLICATION Format and flavor expansion signals are real but secondary to the protein gap - they represent a second wave of innovation opportunity once the core adult-credibility problem is addressed, and they suggest a roadmap rather than a single product brief.

Cultural ubiquity is generating unexpected brand-equity moments that extend the product's credibility well beyond the lunchbox.

The Artemis II astronaut story - **179 mentions at 42% positive** - documents the crew's post-mission craving for Uncrustables as a comfort food, with Smucker's offering a lifetime supply and generating genuine public interest. Separately, the travel and theme-park snack theme (**335 mentions at 57% positive**) positions Uncrustables as a smart, cost-conscious choice for adults navigating expensive food environments. [Earned T12] [Earned T8]

IMPLICATION These moments - astronauts, athletes, travelers - are doing the brand's adult-positioning work without any formal campaign behind them, which means the brand's cultural credibility with adults is already being built by the culture itself. A brand that actively cultivates and amplifies these moments rather than letting them dissipate would be compounding equity that is currently going to waste.

- 05 RECOMMENDATIONS

What to do with this.

1 Brief creators on the adult frozen-eating ritual as a distinct occasion

MESSAGING

A documented, organic consumer behavior - eating Uncrustables frozen or semi-frozen for texture and refreshment - has generated **1,040 mentions at 62% positive sentiment** with no brand amplification behind it. [Earned T3] Adult consumers in athletic, outdoor, and travel contexts are already performing this ritual and describing it in sensory terms that have nothing to do with the lunchbox occasion. [Earned T1 S4 C1] Briefing creators to capture and normalize the frozen-eating moment - framed as an adult choice, not a childhood habit - would formalize an occasion the brand already owns in organic conversation and give adult consumers a shared identity marker.

WHO & WHERE

Adult millennial and Gen Z creators in fitness, travel, and lifestyle; Instagram Reels and TikTok

TRADE-OFF

May feel counterintuitive to a brand used to leading with family messaging; requires trusting adult-first creative

SIGNAL OF SUCCESS

Creator content organically generates frozen-eating saves and shares; adult mention share grows relative to parent-occasion mentions

FIRST STEP

Pull the 62%-positive frozen-ritual conversation as a creative brief; identify 10-15 mid-tier adult lifestyle creators already in the category conversation

2 Accelerate distribution and visibility of the protein-enhanced SKU

PRODUCT & DISTRIBUTION

The protein variant is already being cited by consumers as the answer to the category's main adult friction point - high sugar and insufficient protein for active use - appearing in review themes (**2,994 mentions at 81% positive**) and nutrition conversations (**439 mentions**) as a specific, named solution. [Earned T2] [Earned T7] Meanwhile, Jams is entering the market on exactly the same protein claim, targeting the same athlete and fitness consumer. [Earned T5 S2] Smucker's already has the product - the gap is distribution reach and adult-targeted awareness, not innovation.

WHO & WHERE

Gym-adjacent retail, college campuses, sports venue concessions; fitness and sports nutrition creators

TRADE-OFF

Expanding beyond core grocery channels requires retailer negotiation and potential cannibalization of standard SKU

SIGNAL OF SUCCESS

Protein SKU mention share grows; Jams comparison mentions shift from competitive to defensive; adult NPS improves

FIRST STEP

Audit current protein SKU distribution gaps versus standard SKU; build a targeted retail pitch for gym and campus channels

3 Develop a proactive cultural narrative to offset the lawsuit framing

REPUTATION & COMMUNICATIONS

The Trader Joe's trademark suit produced **848 mentions at 69% negative sentiment** - the highest negativity concentration in the dataset - with consumer framing positioning Smucker's as a defensive monopolist rather than a category innovator. [Earned T4] [Earned T1 S3 C1] This framing directly undermines any adult-positioning move that requires the brand to be seen as culturally open and confident. The brand has positive counternarratives available - the astronaut story, the Boys and Girls Club donation, the athlete partnerships - but they are not being deployed with enough frequency or coordination to shift the dominant frame. [Earned T12] [Earned T5]

WHO & WHERE

Earned media and brand social channels; PR team briefed on cultural counternarrative; editorial and food media

TRADE-OFF

Cannot directly address legal proceedings; counternarrative must be genuine and not appear reactive or defensive

SIGNAL OF SUCCESS

Lawsuit theme's share of negative conversation declines; brand-generosity and innovation stories gain traction in media

FIRST STEP

Identify the three highest-equity positive stories in the data (astronauts, athlete partnerships, community donations) and build a 90-day earned media calendar around them

4 Claim the athlete permission structure before Jams consolidates it

PARTNERSHIP & POSITIONING

The NFL and Division I athlete narrative is the most powerful adult-permission mechanism in the dataset, generating documented consumption behavior and organic conversation that reframes the product as performance fuel rather than a children's snack. [Earned T5 S1] [Earned T1 S6 C1] Jams has entered the market by naming this exact territory as its competitive frame. [Earned T5 S2] Smucker's has existing athlete partnerships and endorsements documented in the data but has not yet used them to build a coherent adult-performance positioning - the pieces are in place but unassembled.

WHO & WHERE

NFL, college athletics, and fitness influencer partnerships; sports media and podcast channels

TRADE-OFF

Performance positioning risks alienating the core parent audience if executed without care; requires tonal discipline

SIGNAL OF SUCCESS

Athlete-context mentions shift from organic to brand-attributed; Jams comparison conversations decrease in frequency

FIRST STEP

Audit existing athlete partnerships for activation gaps; develop a unified athlete-endorsement content strategy that connects the protein SKU to the performance occasion

5 Address the homemade-alternative signal with a value or ingredient response

PRODUCT & VALUE

The DIY Uncrustables trend - documented at **806 mentions** - is driven by two specific complaints: price and ingredient quality. [Earned T1 S5] These consumers are not rejecting the format; they are rejecting the value equation and, in some cases, the ingredient list, with health-conscious adults and parents of children with dietary sensitivities most vocal. [Earned T6] [Earned T13] A cleaner-ingredient variant, a larger-pack value SKU, or a transparent ingredient communication campaign would directly address the stated reasons consumers are opting out - and would close a competitive vulnerability that private-label brands like Trader Joe's are already exploiting.

WHO & WHERE

Health-conscious parent and adult segments; natural and specialty grocery channels; ingredient-transparency content

TRADE-OFF

Cleaner-ingredient reformulation carries cost and supply-chain implications; value SKU may pressure margin

SIGNAL OF SUCCESS

Homemade-alternative conversation volume declines; ingredient-concern mentions shift from negative to neutral

FIRST STEP

Quantify the price-sensitivity and ingredient-concern segments from the data; commission a cost-of-goods analysis for a cleaner-ingredient SKU

- 06 WATCHLIST - 90-DAY SIGNALS

What could change the call.

The analysis above reflects the conversation as it stands through July 2026, but five dynamics have the potential to materially shift the strategic picture within the next 90 days. These are not speculative risks - each is already present in the data in early or emergent form, and each has a specific trigger that would warrant reopening the recommendations above. Monitoring these signals is the difference between a strategy that adapts to the category's evolution and one that is overtaken by it.

#	SIGNAL	TRIGGER TO REOPEN	HORIZON
1	Jams distribution expansion - if Jams moves from niche/online to major grocery chains, the competitive threat escalates from a conversation signal to a shelf-presence reality that changes the urgency of Smucker's protein SKU push	Jams appears in grocery-haul or retail-context mentions at 50+ mentions per month	NOW
2	Trader Joe's lawsuit resolution - a ruling or settlement will either validate Smucker's IP position (potentially reducing the negativity narrative) or amplify the monopoly framing if the outcome favors Trader Joe's in public perception	Legal outcome generates a new spike of 200+ mentions in a single week	30 DAYS
3	NFL season activation - the start of the NFL season is the highest-leverage moment for the athlete permission narrative; if Jams activates a visible NFL partnership before Smucker's formalizes its own, the competitive window on athlete positioning narrows sharply	Jams NFL partnership or sponsored content appears in athlete-context conversations	30 DAYS
4	Welch's PB&J entry gaining traction - Welch's was named in the project hypothesis as a new entrant but did not generate a distinct conversation cluster in the current data; if it activates with media spend or retail placement, it could create a second competitive front on the nostalgia and brand-equity dimensions where Smucker's is currently strongest	Welch's frozen PB&J mentions exceed 100 in a single month with positive sentiment above 50%	60 DAYS
5	Homemade-alternative trend reaching mainstream media - the DIY Uncrustables conversation is currently social-native; if it crosses into food media, parenting publications, or morning television as a cost-saving or clean-eating story, the value and ingredient narrative will intensify and could accelerate private-label substitution at retail	DIY Uncrustables appears in three or more editorial media outlets within a 30-day window	90 DAYS

- METHODOLOGY & GLOSSARY

What Discover does, and what the labels mean.

DATA SOURCES AND TOOLS

YouScan ingests comment-level conversation and sentiment across earned and owned streams. **Tellagence Discover** - the patented Contextual Localization Engine - clusters themes, scores momentum, and compiles the executive output. Clusters roll into stories, and stories roll into themes.

SENTIMENT DEFINITIONS

Total mentions: total record count processed in the cycle. **Verified sample:** total mentions excluding records without a determinable sentiment. **Positive / Negative Sentiment:** percentage of explicitly positive / negative records in the verified sample. **Net Sentiment:** Positive % minus Negative %.

CITATIONS

Chips such as [Earned T3] trace each claim to the parent_reference of the theme, story, or cluster it came from in the source data.

The exact query behind this data.

```
((("Smucker" OR "Smuckers") /3 ("Uncrustables" OR "Uncrustable")) OR "Uncrustables" OR ("Jams" /3 ("PB&J" OR
"peanut butter" OR sandwich)) OR (("Welch" OR "Welchs") /3 ("PB&J" OR "peanut butter" OR sandwich)) OR "frozen
PB&J" OR #smuckersuncrustables OR #uncrustablessandwich) /10 (frozen OR sandwich OR lunch OR snack OR
"lunchbox" OR "school lunch" OR breakfast OR "on the go")
```