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US Collection

# Canned Foods: United States

October 2018



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# About This Report

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## Scope

This report forecasts to 2022 US canned food demand and shipments in nominal US dollars at the manufacturer level. Total demand and shipments are segmented by product in terms of:

- dressings and sauces
- fruits and vegetables
- dog and cat food
- meat, poultry, and seafood
- dairy products
- soups and stews
- other canned food such as canned baby food, beans, and peanut butter

To illustrate historical trends, total demand, total shipments, the various segments, and trade are provided in annual series from 2007 to 2017.

Canned food is shelf-stable processed food that is heat treated and packaged in airtight containers such as bottles, cans, and jars. In some categories, food that is traditionally packaged in cans but also available in pouches is also included in the scope of this report. Certain specialty canned items, such as canned desserts, table syrup, and honey, are excluded from the scope of this report. Re-exports of canned food are excluded from demand and trade figures.

This report includes the results of a proprietary national online consumer survey of US adults (age 18+). This Freedonia Focus Reports National Survey has a sample size of approximately 2,000, screened for response quality, and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Canned Food: United States* (FF10012) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

## About This Report

- intergovernmental organizations
- trade associations and their publications
- proprietary national consumer survey data
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 8 | NAICS & SIC Codes Related to Canned Food

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
311111	Dog and Cat Food Manufacturing	2011	Meat Packing Plants
311421	Fruit and Vegetable Canning	2013	Sausages and Other Prepared Meats
311422	Specialty Canning	2015	Poultry Slaughtering and Processing
311514	Dry, Condensed, and Evaporated Dairy Product Manufacturing	2023	Dry, Condensed, Evaporated Products
311611	Animal (except Poultry) Slaughtering	2032	Canned Specialties
311612	Meat Processed from Carcasses	2033	Canned Fruits and Specialties
311615	Poultry Processing	2035	Pickles, Sauces, and Salad Dressings
311711	Seafood Canning	2047	Dog and Cat Food
311941	Mayonnaise, Dressing, and Other Prepared Sauce Manufacturing	2091	Canned and Cured Fish and Seafoods
326160	Plastics Bottle Manufacturing	2099	Other Food Preparations, Nec
327213	Glass Container Manufacturing	3085	Plastics Bottles
332431	Metal Can Manufacturing	3221	Glass Containers
		3411	Metal Cans
		5147	Meats and Meat Products

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

## About This Report

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Food Containers in the US*, April 2018

*Food Safety Products in the US*, April 2018

*Global Food Processing Machinery*, September 2017

#### Freedonia Focus Reports

*Aluminum: United States*

*Condiments & Sauces: United States*

*Dairy Products: United States*

*Food Containers: United States*

*Food Safety Products: United States*

*Global Food Processing Machinery*

*Meat & Poultry Products: United States*

*Processed Food: United States*

#### Freedonia Custom Research

### Trade Publications

*BRANDPackaging*

*The Canmaker*

*FoodBev*

*Food Business News*

*Food Business Review*

*FoodNavigator-USA*

*Food Processing*

*Prepared Foods*

*Progressive Grocer*

*Supermarket News*

### Agencies & Associations

The Association for Dressings & Sauces

Bureau of Labor Statistics

Canned Food Alliance

Canned Manufacturers Institute

Food Marketing Institute

Glass Packaging Institute

Grocery Manufacturers Association

Pet Food Institute

## About This Report

United States Census Bureau  
United States Department of Agriculture  
United States Food and Drug Administration  
United States International Trade Commission