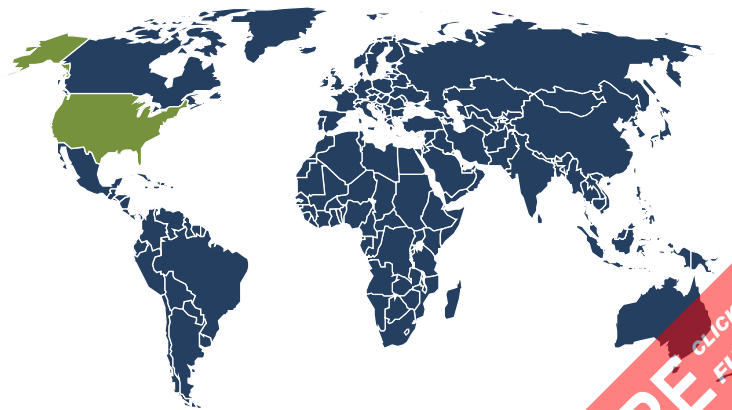




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Frozen Foods: United States

September 2020



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About This Report

Scope

This report forecasts to 2020 and 2024 US frozen food demand and shipments in nominal US dollars at the manufacturer level. Total demand and shipments are segmented by product in terms of:

- meat and poultry
- meals
- produce and juice
- seafood
- baked goods
- ice cream and frozen desserts

To illustrate historical trends, total demand, total shipments, the various segments, and trade are provided in annual series from 2009 to 2019.

Packaged ice and shelf-stable or refrigerated products frozen after purchase are excluded from the scope of this report. Frozen dough (e.g., pizza dough for restaurant use) is excluded from the scope of this report. Lactose free/non-dairy ice cream, powdered ice cream mixes, and ice cream prepared in foodservice establishments (e.g., ice cream shops) are excluded from the scope of this report. Re-exports of frozen foods are excluded from demand and trade figures.

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

Sources

Frozen Foods: United States (FF10015) represents the synthesis and analysis of data from various secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

About This Report

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

Industry Codes

Table 9 | NAICS & SIC Codes Related to Frozen Foods

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
311411	Frozen Fruit, Juice, and Vegetable Mfg	2011	Meat Packing Plants
311412	Frozen Specialty Food Mfg	2015	Poultry Slaughtering and Processing
311520	Ice Cream and Frozen Dessert Mfg	2024	Ice Cream and Frozen Desserts
311611	Animal (Except Poultry) Slaughtering	2037	Frozen Fruits, Fruit Juices, and Vegetables
311615	Poultry Processing	2038	Frozen Specialties, NEC
311712	Seafood Product Preparation and Packaging	2051	Bread and Other Bakery Products, Except Cookies and Crackers
311812	Commercial Bakeries	2092	Fresh or Frozen Packaged Fish

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.

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

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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 & Beverage Packaging Innovation

Food Safety Products in the US

Global Food Processing Machinery

Freedonia Focus Reports

Beverage Retail: United States

Commercial Refrigeration Equipment: United States

Fast Food: United States

Food Gifting: United States

Food Retail: United States

Global Food E-Commerce

Household Refrigerators & Freezers: United States

Pet Food: United States

Pet Treats & Chews: United States

Processed Food: United States

Snack Foods: United States

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Trade Publications

Food Processing

Prepared Foods

Progressive Grocer

Refrigerated & Frozen Foods

Supermarket News

Agencies & Associations

American Dairy Science Association

American Frozen Food Institute

Grocery Manufacturers Association

Institute of Food Technologists

National Frozen & Refrigerated Foods Association

North American Meat Institute

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission