



Freedonia Focus Reports
US Collection

Frozen Foods: United States

June 2018



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About This Report

Scope & Method

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

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

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

Packaged ice, frozen carryout and meal delivery program foods, 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.

This report 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.

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

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

About This Report

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

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

Industry Codes

Table 6 | Industry Codes Related to Frozen Food

NAICS/SCIAN 2007		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	Fresh and Frozen Seafood Processing	2045	Prepared Flour Mixes and Doughs
311812	Commercial Bakeries	2051	Bread and Other Bakery Products, Except Cookies and Crackers
311813	Frozen Cakes, Pies, and Other Pastries Mfg	2053	Frozen Bakery Products, Except Bread
311822	Flour Mixes and Dough Mfg from Purchased Flour	2092	Prepared Fresh or Frozen Fish and Seafoods

Source: US Census Bureau

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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

Cheese: United States

Fresh Produce Retail: United States

Frozen Foods Retail: United States

Household Refrigerators & Freezers: United States

Ice Cream & Frozen Desserts: United States

Meat Packaging: United States

Meat & Poultry Packaging: United States

Meat & Poultry Products: United States

Meat & Poultry Retail: United States

Pouches: United States

Poultry Packaging: 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