



Freedonia Focus Reports
US Collection

Gluten-Free Foods: United States

November 2016



Highlights

Market Overview

Market Definition | Market Size | Marketers | The Retail and Foodservice Marketplace
Product Trends and Opportunities | The Gluten-Free Consumer | Companies Cited

Resources

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ABOUT THIS REPORT

Scope & Method

This report forecasts annual US retail sales of gluten-free foods in US dollars for 2016-2020. Total mass-market sales of gluten-free foods by product and total retail sales are provided for 2011-2015. Total mass-market sales are segmented by product in terms of:

- salty snacks
- crackers
- fresh bread
- pasta
- cold cereal
- baking mixes
- cookies
- flour
- frozen bread and dough.

Packaged Facts has established two main criteria for determining whether a product falls within its market definition: whether the product could possibly contain gluten and whether a product is clearly labelled and marketed as gluten-free. Potato chips and ready-to-eat popcorn are not included in estimates of market size because they are both naturally gluten-free foods.

This report quantifies trends in various measures of growth. 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. 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.

A full outline of report items by page is available in the [Table of Contents](#).

Sources

Gluten-Free Foods: United States (FF10040) is based on [Gluten-Free Foods in the US, 6th Edition](#), a comprehensive industry report published by Packaged Facts in November 2016. Estimates of market size and marketer shares are compiled from data derived from a variety of sources, including Information Resources' InfoScan Review, Nielsen Scantrack, and SPINSScan sales tracking services; syndicated market research studies; individual company reports; industry publications; and Packaged Facts' own extensive food and beverage research database and report collection.

The consumer data in this report are derived from two sources. One is proprietary Packaged Facts online consumer surveys that are based on 2,000 US adults who in aggregate are census representative on the primary demographic measure of age, gender, geographic region, race/ethnicity, and presence of children in the household. This report relies particularly on the survey conducted in July/August 2016 expressly for this report, as well as, for purposes of comparison and trending, the surveys conducted for Packaged Facts' 2010, 2012, and 2014 reports on gluten-free foods.

The other source of consumer data is the Simmons Market Research National Consumer Survey Adult Study, Spring 2016 and previous annual surveys for historical trending. On an ongoing basis, Simmons conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) who in aggregate represent a statistically accurate cross-section of the US population.

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

Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311212	Rice Milling	2043	Cereal Breakfast Foods
311230	Breakfast Cereal Mfg	2044	Rice Milling
311812	Commercial Bakeries	2045	Prepared Flour Mixes and Doughs
311813	Frozen Cakes, Pies, and Other Pastries Mfg	2051	Bread and Other Bakery Products, Except Cookies and Crackers
311821	Cookie and Cracker Mfg	2052	Cookies and Crackers
311822	Flour Mixes and Dough Mfg from Purchased Flour	2053	Frozen Bakery Products, Except Bread
311823	Dry Pasta Mfg	2096	Potato Chips, Corn Chips, and Similar Snacks
311919	Other Snack Food Mfg	2098	Macaroni, Spaghetti, Vermicelli, and Noodles
		2099	Food Preparations, NEC

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RESOURCES

Packaged Facts

Gluten-Free Foods in the US, 6th Edition, November 2016

www.packagedfacts.com

[see report contents](#)

The Freedonia Group

www.freedoniagroup.com

Related Industry Studies

3397 World Flavors & Fragrances, March 2016

[see study contents](#)

3275 World Food Processing Machinery, June 2015

[see study contents](#)

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Grain-Based Foods: United States

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Healthy-Ingredient Snacks: United States

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Natural & Organic Foods & Beverages: United States

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Processed Food: United States

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Salty Snacks: United States

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Snack Foods: United States

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Sweet Baked Goods: United States

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Trade Publications

Convenience Store News

www.csnews.com

FoodBev Media

www.foodbev.com

Food Business Review

www.food-business-review.com

Foodnavigator-usa.com

www.foodnavigator-usa.com

Food Processing

www.foodprocessing.com

Snack Food & Wholesale Bakery

www.snackandbakery.com

Agencies & Associations

Celiac Disease Foundation

www.celiac.org

Celiac Support Association

www.csaceliacs.org

Gluten-Free Certification Organization

www.gfco.org

Information Resources

www.iriworldwide.com

International Dairy-Deli-Bakery Association

www.iddba.org

International Food Information Council Foundation

www.foodinsight.org

Simmons National Consumer Survey

www.simmonssurvey.com

United States Census Bureau

www.census.gov

United States Department of Agriculture

www.usda.gov

United States Food and Drug Administration

www.fda.gov

United States International Trade Commission

www.usitc.gov

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