



Freedonia Focus Reports  
US Collection

# Frozen Foods Retail: United States

February 2017



## Highlights

### Market Overview

Market Size | Product Trends | Retail and Foodservice | Consumer Trends  
Competitive Environment

## Resources

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

CLICK TO ORDER  
FULL REPORT  
BROCHURE  
CLICK TO ORDER  
FULL REPORT

# TABLE OF CONTENTS

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Overview</b>	<b>4</b>
Market Size	4
Frozen Foods Market Remains at \$20.8 Billion in IRI-Tracked Sales	7
Frozen Dinner/Entrée Sales Show Five-Year Losses	8
Side Dishes Sales Flatten	8
Frozen Pizza Showing Signs of Reviving?	9
Growth Falterers in Frozen Appetizers/Snacks	9
Frozen Considered More Affordable, Convenient Than Other Hot Meal Products	9
Frozen Foods Consumers Perceive Refrigerated/Fresh as Higher Quality	10
Preference for Fresh Presents a Formidable Challenge	10
Product Trends	11
Retail & Foodservice	12
National Frozen & Refrigerated Foods Association Emphasizes Quality & Freshness to Promote Frozen	13
Consumer Trends	14
Half of Frozen Foods Consumers Keep Hot Meal Items on Hand	15
Quality Remains Most Important Factor in Purchase Decisions	15
Frozen Considered Most Convenient, Affordable Type of Hot Meal Item	15
Frozen Foods Consumers Are Busy & Strapped for Time	15
Concern About Nutritional Value of Frozen Skews Upscale	16
Competitive Environment	17
Market Share	17
Nestlé	19
Conagra Brands	20
Private Label	21
The Schwan Food Company	21
Pinnacle Foods	22
<b>3. About This Report</b>	<b>23</b>
Scope & Method	23
Sources	23
Industry Codes	24
Resources	25

# LIST OF TABLES & FIGURES

---

Figure 1   US Frozen Food Retail Sales by Product; 2011-2016, 2021 (US\$ mil)	4
Table 1   US Frozen Food Retail Sales by Product; 2011-2016, 2021 (US\$ mil)	4
Figure 2   US Frozen Food Retail Sales by Product Share (%)	6
Table 2   US IRI-Tracked Sales of Frozen Dinners/Entrées, Pizza, Side Dishes & Appetizers/Snacks, 2015-2016	7
Table 3   US Retail Channels Where Packaged Frozen Hot Meal Items Are Purchased (% of US adults)	12
Table 4   US Household Use of Frozen Dinners, Entrées, Pizza, Snacks & Vegetables, 2016 (% of hshlds)	14
Figure 3   US Frozen Food Retail Market Share by Supplier, 2016	17
Table 5   Leading Participants in the US Frozen Food Retail Market by Product	18
Table 6   Industry Codes Related to Frozen Food Retail	24

# ABOUT THIS REPORT

---

## Scope & Method

This report forecasts US frozen food retail sales in US dollars for 2017-2021. Total sales are segmented by product in terms of:

- frozen dinners/entrées
- frozen side dishes
- frozen pizzas
- frozen appetizers/snacks.

To illustrate historical trends, total retail sales and the various segments are provided in annual series from 2011 to 2016.

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.

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 Retail: United States* (FF10044) is based on [Frozen Foods in the US](#), a comprehensive industry report published by Packaged Facts. Sales figures attributed to Information Resources (IRI) are based on IRI multi-outlet (MULO), which represents sales through US supermarkets, drugstores, mass merchandisers (Walmart, Target, Kmart, and Shopko), Sam's Club and BJ's warehouse clubs, dollar stores excluding Dollar Tree, and military commissaries.

Packaged Facts' estimates of total market size for frozen foods and the categories covered incorporate sales through all channels and outlets.

The Packaged Facts National Consumer Survey and Simmons National Consumer Survey are used in conjunction to present a multi-faceted analysis of consumer behavior, but they

## ABOUT THIS REPORT

are not directly comparable. For example:

- Simmons for frozen food categories typically uses households as a base, whereas Packaged Facts uses adults as the base.
- In some cases, survey findings refer to a segment of the survey population. Most questions from the Packaged Facts survey conducted for this report are addressed specifically to the segment of consumers who purchase frozen hot meal items.
- The frozen foods categories as identified by Simmons do not correspond precisely with Packaged Facts' categorizations; for instance, in Simmons, frozen dinners are distinguished from frozen entrées.

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 Retail

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311411	Frozen Fruit, Juice, and Vegetable Mfg	2013	Sausages and Other Prepared Meat Products
311412	Frozen Specialty Food Mfg	2015	Poultry Slaughtering and Processing
311520	Ice Cream and Frozen Dessert Mfg	2024	Ice Cream and Frozen Desserts
311612	Meat Processed From Carcasses	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	2052	Cookies and Crackers
311822	Flour Mixes and Dough Mfg from Purchased Flour	2053	Frozen Bakery Products, Except Bread
424420	Packaged Frozen Food Merchant Wholesalers	2092	Prepared Fresh or Frozen Fish and Seafoods
424430	Dairy Product (except Dried or Canned) Merchant Wholesalers	5142	Packaged Frozen Foods
		5143	Dairy Products, Except Dried or Canned

Source: US Census Bureau

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### Packaged Facts

*Frozen Foods in the US*, February 2017

### The Freedonia Group

#### Freedonia Industry Studies

*Poultry Packaging Market in the US*, March 2017

*Meat Packaging Market in the US*, February 2017

*Natural Flavors & Fragrances*, October 2016

*Retail Ready Packaging*, July 2016

*World Flavors & Fragrances*, March 2016

*Food Containers: Rigid & Flexible*, February 2016

*Beverage Containers*, June 2015

#### Freedonia Focus Reports

*Canned Foods: United States*

*Dairy Products: United States*

*Frozen Foods: United States*

*Gluten-Free Foods: United States*

*Grain-Based Foods: United States*

*Healthy-Ingredient Snacks: United States*

*Ice Cream & Frozen Desserts: United States*

*Meat & Poultry Products: United States*

*Natural & Organic Foods & Beverages: United States*

*Processed Food: United States*

*Snack Foods: United States*

#### Freedonia Custom Research

### Trade Publications

*Dairy Foods*

*Food Business News*

*Food Business Review*

*Grocery Headquarters*

*Prepared Foods*

*Progressive Grocer*

*Refrigerated & Frozen Foods*

*Supermarket News*

**Agencies & Associations**

American Dairy Products Institute  
American Frozen Food Institute  
Grocery Manufacturers Association  
Information Resources  
International Dairy Foods Association  
National Frozen & Refrigerated Foods Association  
National Ice Cream Retailers Association  
North American Meat Institute  
Simmons National Consumer Survey  
United States Census Bureau  
United States Food and Drug Administration  
United States International Trade Association