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# Dough, Dry Pasta, & Tortillas: United States

June 2020



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# About This Report

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## Scope

This report forecasts to 2024 US dough, tortillas, and dry pasta demand and shipments in nominal US dollars at the manufacturer level. Total demand and shipments are segmented by product in terms of:

- dough
- tortillas
- dry pasta

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

Dough manufactured in a factory for eventual transformation by a franchise (e.g., pizza franchisee purchasing dough from franchisor's factories) or sold to independent businesses or consumers for eventual incorporation in a food product is included in the scope of this report. However, frozen pizzas are excluded from the scope of this report, as are pizza and other dough types made in factories, bakeries, and on the premises of retail locations for immediate transformation into a finished product. Also excluded are tortilla chips and strips. Re-exports of dough, dry pasta, and tortillas 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

*Dough, Dry Pasta, & Tortillas: United States* (FF10055) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- proprietary and licensed national consumer survey data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group

## About This Report

- the findings of other reports and studies by The Freedonia Group and Packaged Facts

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 Dough, Dry Pasta, & Tortillas

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
311824	Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour	2045	Prepared Flour Mixes and Doughs
311830	Tortilla Manufacturing	2098	Macaroni, Spaghetti, Vermicelli, and Noodles
		2099	Food Preparations, Nec

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 historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

## About This Report

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*

*Global Food Processing Machinery*

*Global Food E-Commerce*

#### Freedonia Focus Reports

*Bread & Bakery Products: United States*

*Canned Foods: United States*

*Dairy Products: United States*

*Demographics: United States*

*E-Commerce: United States*

*Fast Foods: United States*

*Food Processing Machinery: United States*

*Food Retail: United States*

*Frozen Foods: United States*

*Grain-Based Foods: United States*

*Ice Cream & Frozen Desserts: United States*

*Meat & Poultry Products: United States*

*Nuts & Seeds: United States*

*Processed Food: United States*

*Snack Foods: United States*

#### Freedonia Custom Research

### Packaged Facts

*Food Carryout & Delivery*

### Trade Publications

*Baking Business*

*Bakery & Snacks*

*Food Business News*

*Food Processing*

*FoodBev*

*Grocery Business*

*PMQ*

*Prepared Foods*

*Refrigerated & Frozen Foods*

*World-Grain.com*

### **Agencies & Associations**

American Bakers Association  
American Frozen Food Institute  
Grain Foods Foundation  
Grocery Manufacturers Foundation  
National Frozen & Refrigerated Foods Association  
National Pasta Association  
US Bureau of Economic Analysis  
US Bureau of Labor Statistics  
US Census Bureau  
US Department of Agriculture  
US Environmental Protection Agency  
US Food & Drug Administration  
US International Trade Commission  
World Bank