



Freedonia Focus Reports  
US Collection

# Food Retail: United States

January 2019



CLICK TO ORDER  
FULL REPORT **BROCHURE** CLICK TO ORDER  
FULL REPORT

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

# Table of Contents

---

|                              |           |
|------------------------------|-----------|
| <b>1. Highlights</b>         | <b>3</b>  |
| <b>2. Market Overview</b>    | <b>4</b>  |
| Market Size                  | 4         |
| Meat & Poultry               | 5         |
| Salty Snacks                 | 7         |
| Chocolate Candy              | 9         |
| Fresh Bread                  | 11        |
| Natural & Specialty Cheese   | 13        |
| Ice Cream & Frozen Novelties | 15        |
| Frozen Dinners & Entrees     | 17        |
| Cereal                       | 19        |
| Cookies                      | 21        |
| Yogurt                       | 23        |
| Meal & Snack Bars            | 25        |
| Soup                         | 27        |
| Fresh Packaged Salads        | 29        |
| Frozen Pizza                 | 31        |
| <b>3. About This Report</b>  | <b>33</b> |
| Scope                        | 33        |
| Sources                      | 34        |
| Industry Codes               | 35        |
| Resources                    | 36        |

# List of Tables & Figures

---

|  |    |
|--|----|
| Figure 1   Key Trends in the US Food Retail Market, 2018 – 2023              | 3  |
| Table 1   US Food Retail Sales by Category, 2013 – 2023 (US\$ mil)           | 4  |
| Table 2   Selected Marketers & Brands of Meat & Poultry                      | 6  |
| Table 3   Selected Marketers & Brands of Salty Snacks                        | 8  |
| Figure 2   US Chocolate Candy Retail Share by Company, 2018 (%)              | 10 |
| Table 4   Selected Marketers & Brands of Chocolate Candy                     | 10 |
| Figure 3   US Fresh Bread Retail Share by Company, 2018 (%)                  | 12 |
| Table 5   Selected Marketers & Brands of Fresh Bread                         | 12 |
| Figure 4   US Natural & Specialty Cheese Retail Share by Company, 2018 (%)   | 14 |
| Table 6   Selected Marketers & Brands of Natural & Specialty Cheese          | 14 |
| Figure 5   US Ice Cream & Frozen Novelties Retail Share by Company, 2018 (%) | 16 |
| Table 7   Selected Marketers & Brands of Ice Cream & Frozen Novelties        | 16 |
| Table 8   Selected Marketers & Brands of Frozen Dinners/Entrees              | 18 |
| Figure 6   US Cereal Retail Share by Company, 2018 (%)                       | 20 |
| Table 9   Selected Marketers & Brands of Cereal                              | 20 |
| Figure 7   US Cookies Retail Share by Company, 2018 (%)                      | 22 |
| Table 10   Selected Marketers & Brands of Cookies                            | 22 |
| Figure 8   US Yogurt Retail Share by Company, 2018 (%)                       | 24 |
| Table 11   Selected Marketers & Brands of Yogurt                             | 24 |
| Table 12   Selected Marketers & Brands of Meal & Snack Bars                  | 26 |
| Table 13   Selected Marketers & Brands of Soup                               | 28 |
| Figure 9   US Fresh Packaged Salads Retail Share by Company, 2018 (%)        | 30 |
| Table 14   Selected Marketers & Brands of Fresh Packaged Salads              | 30 |
| Figure 10   US Frozen Pizza Retail Share by Company, 2018 (%)                | 32 |
| Table 15   Selected Marketers & Brands of Frozen Pizza                       | 32 |
| Table 16   NAICS & SIC Codes Related to Food Retail                          | 35 |

# About This Report

---

## Scope

This report forecasts US food retail sales in nominal US dollars for 2018-2023. Total retail sales are segmented by product in terms of:

- meat and poultry
- salty snacks
- chocolate candy
- fresh bread
- natural and specialty cheese
- ice cream and frozen novelties
- frozen dinners/entrees
- cereal
- cookies
- yogurt
- meal and snack bars
- soup
- fresh packaged salads
- frozen pizza

To illustrate historical trends, total retail sales and the various segments are provided in annual series from 2013 to 2017.

This report focuses on the market for selected food products sold to consumers in the US through retail channels. All retail channels of distribution are covered in market sizing and discussion, including supermarkets and grocery stores, mass merchandisers and supercenters, warehouse clubs, natural food stores, convenience stores, drugstores, dollar stores, and direct-sales channels including online.

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.

A full outline of report items by page is available in the Table of Contents.

## Sources

*Food Retail: United States* (FF10061) is based on [U.S. Food Market Outlook 2019](#), a comprehensive industry study published by Packaged Facts. The information in that report was obtained from both primary and secondary research. Primary research included consultation with industry sources and on-site examination of retail stores. Secondary research entailed gathering data from relevant trade, business, and government sources, as well as company promotional literature and annual reports. Our estimates of market size and company performance are based on various sources including reported revenues of product manufacturers and retailers, relevant publications, and other market research sources. The analysis in this report also draws, as a background source, on retail sales tracking data as available from IRI and Nielsen (for mass-market channels), and SPINS (for the natural channel).

Our consumer analysis draws on national consumer survey data licensed by Simmons Research LLC. On a quarterly basis, Simmons releases 12-month aggregations of booklet-based survey results from a large and random sample (approximately 25,000 for each quarterly release) that accurately represents the US population. This database allows for historical trending and detailed consumer profiles across various demographic and psychographic measures as well as product and service categories.

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

## Industry Codes

Table 16 | NAICS & SIC Codes Related to Food Retail

| NAICS/SCIAN 2007                              |   | SIC                                |  |
|---|---|------------------------------------|--|
| North American Industry Classification System |   | Standard Industrial Classification |  |
| 311320  | Chocolate and Confectionery Mfg from Cacao Beans            | 2013                               | Sausages and Other Prepared Meat Products                    |
| 311330  | Confectionery Mfg from Purchased Chocolate                  | 2015                               | Poultry Slaughtering and Processing                          |
| 311411  | Frozen Fruit, Juice, and Vegetable Mfg                      | 2022                               | Natural, Processed, and Imitation Cheese                     |
| 311412  | Frozen Specialty Food Mfg                                   | 2023                               | Dry, Condensed, and Evaporated Dairy Products                |
| 311423  | Dried and Dehydrated Food Mfg                               | 2024                               | Ice Cream and Frozen Desserts                                |
| 311513  | Cheese Mfg  | 2034                               | Dried & Dehydrated Fruits, Vegetables, & Soup Mixes          |
| 311514  | Dry, Condensed, & Evaporated Dairy Product Mfg              | 2037                               | Frozen Fruits, Fruit Juices, and Vegetables                  |
| 311520  | Ice Cream and Frozen Dessert Mfg                            | 2038                               | Frozen Specialties, NEC                                      |
| 311612  | Meat Processed From Carcasses                               | 2045                               | Prepared Flour Mixes and Doughs                              |
| 311615  | Poultry Processing  | 2051                               | Bread and Other Bakery Products, Except Cookies and Crackers |
| 311712  | Fresh and Frozen Seafood Processing                         | 2052                               | Cookies and Crackers   |
| 311811  | Retail Bakeries   | 2053                               | Frozen Bakery Products, Except Bread                         |
| 311812  | Commercial Bakeries   | 2066                               | Chocolate and Cocoa Products                                 |
| 311813  | Frozen Cakes, Pies, and Other Pastries Mfg                  | 2092                               | Prepared Fresh or Frozen Fish and Seafoods                   |
| 311822  | Flour Mixes and Dough Mfg from Purchased Flour              | 2099                               | Food Preparations, NEC                                       |
| 311991  | Perishable Prepared Food Mfg                                | 5142                               | Packaged Frozen Foods  |
| 424420  | Packaged Frozen Food Merchant Wholesalers                   | 5144                               | Poultry and Poultry Products                                 |
| 424430  | Dairy Product (except Dried or Canned) Merchant Wholesalers | 5145                               | Confectionery  |
| 424470  | Meat and Meat Product Merchant Wholesalers                  | 5147                               | Meats and Meat Products                                      |
| 424480  | Fresh Fruit and Vegetable Merchant Wholesalers              | 5148                               | Fresh Fruits and Vegetables                                  |
| 445110  | Supermarkets and Other Grocery (except Convenience) Stores  | 5411                               | Grocery Stores   |
| 445210  | Meat Markets  | 5441                               | Candy, Nut, and Confectionery Stores                         |
| 445292  | Confectionery and Nut Stores                                | 5461                               | Retail Bakeries  |

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

*U.S. Food Market Outlook 2019*

### The Freedonia Group

#### Freedonia Industry Studies

*Commercial Refrigeration Equipment in the US*

*Food Containers in the US*

*Food Safety Products in the US*

*Global Food Processing Machinery*

*Retail E-Commerce Packaging Market in the US*

#### Freedonia Focus Reports

*Cheese: United States*

*Demographics: United States*

*Dough, Dry Pasta, & Tortillas: United States*

*Fresh Produce Retail: United States*

*Frozen Foods Retail: United States*

*Grain-Based Foods: United States*

*Meat & Poultry Products: United States*

*Processed Food: United States*

#### Freedonia Custom Research

### Trade Publications

*Food Business News*

*FoodNavigator-USA*

*Prepared Foods*

*Progressive Grocer*

*Refrigerated & Frozen Foods*

*Supermarket News*

### Agencies & Associations

American Frozen Food Institute

Food Marketing Institute

Grocery Manufacturers Association

National Frozen & Refrigerated Foods Association

North American Meat Institute

Private Label Manufacturers Association

United States Census Bureau