
Description: Frozen Foods in the U.S. projects that sales of frozen foods over the 2016-2021 period will experience a negative compound annual growth rate (CAGR) of -1.2%, going from over $22 billion to around $21 billion for the four key frozen food categories: Frozen Dinners/Entrées; Frozen Pizzas; Frozen Side Dishes; and Frozen Appetizers/Snacks.

The report covers sales through U.S. 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.

Contents:

CHAPTER 1 EXECUTIVE SUMMARY
INSIGHTS AND OPPORTUNITIES
The Market
Table 1-1 Overall Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2011-2016 (millions of dollars)
Table 1-2 Projected Overall Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2016-2021 (millions of dollars, percent)
Competitive Environment
Figure 1-1 Marketer Share of Sales for Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizer/Snacks, 2016 (percent share of dollar sales)
Table 1-3 Company Participation by Category, 2016
Product Trends
Retail and Foodservice
Table 1-4 Retail Channels Where Packaged Frozen Hot Meal Items Are Purchased (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Consumer Trends
Table 1-4 Household Use of Frozen Dinners, Entrées, Pizzas, Snacks, and Vegetables, 2016 (percent of U.S. households)
CHAPTER 2 MARKET OVERVIEW
KEY POINTS
NOTE ON METHODOLOGY
MARKET CATEGORIES
OVERALL MARKET AT $22.3 BILLION
Table 2-1 Overall Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2011-2016 (millions of dollars)
Table 2-2 Sales by Category of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2011-2016 (millions of dollars)
Figure 2-1 Share by Category of Overall Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2016 (percent share of dollar sales)
Frozen Dinner/Entrée Sales Show Negative Five-Year Growth
Table 2-3 IRI-Tracked Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2015-2016 (millions of dollars, percent)
Table 2-4 IRI-Tracked Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2015-2016 (dollar sales change, unit sales change, volume change)
Frozen Dinner/Entrée Sales Show Negative Five-Year Growth
Table 2-5 Sales of Frozen Dinners/Entrées, 2011-2016 (millions of dollars, percent)
Figure 2-2 IRI-Tracked Sales of Frozen Dinners/Entrées Segments, 2016 (millions of dollars, percent)
Frozen Pizza Showing Signs of Reviving?
Table 2-6 Sales of Frozen Pizzas, 2011-2016 (millions of dollars, percent)
Side Dishes Sales Flatten
Table 2-7 Sales of Frozen Side Dishes, 2011-2016 (millions of dollars, percent)
Figure 2-3 IRI-Tracked Sales of Frozen Side Dish Segments, 2016 (millions of dollars, percent)
Growth Falters in Frozen Appetizers/Snacks

Table 2-8 Sales of Frozen Appetizers/Snacks, 2011-2016 (millions of dollars, percent)

Figure 2-4 IRI-Tracked Sales of Frozen Appetizer/Snack Segments, 2016 (millions of dollars, percent)

MARKET OUTLOOK

Share of Consumers Who Buy Frozen Hot Meal Items Jumps to 90%

Figure 2-5 Purchase Rates for Frozen Hot Meal Items, 2014 vs 2016 (percent of U.S. adults)

Declining Household Usage Rates Shown for Frozen Hot Meal Items...

Table 2-9 Household Use of Frozen Dinners, Entrées, Pizzas, Snacks, and Vegetables, 2012-2016 (percent of U.S. households)

...But Current Frozen Foods Consumers Are Buying More

Figure 2-6 Increased Purchasing of Packaged Frozen Hot Meal Items, by Category, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Table 2-10 Increased Purchasing of Packaged Frozen Hot Meal Items, by Category, 2014 vs. 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Nutritional Value of Frozen Foods a Growing Concern

Table 2-11 Level of Agreement with Statement: “Most Frozen Dinners Have Little Nutritional Value,” 2012-2016 (percent of U.S. population)

Frozen Considered More Affordable, Convenient Than Other Hot Meal Products

Table 2-12 Opinions About Frozen vs. Other Types of Packaged Hot Meal Items, 2014 vs. 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Quality the Most Important Factor to 80% of Frozen Foods Consumers

Figure 2-7 Importance of Various Factors in Frozen Hot Meal Item Purchasing Decisions, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Table 2-13 Importance of Various Factors in Frozen Hot Meal Item Purchasing Decisions, 2014 vs. 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Frozen Foods Consumers Perceive Refrigerated/Fresh as Higher Quality

Figure 2-8 Opinions About Frozen vs. Other Types of Packaged Hot Meal Items, 2016 (percent of U.S. adults Preference for Fresh Presents a Formidable Challenge)

Table 2-14 Reasons for Not Purchasing Packaged Frozen Hot Meal Items, 2012 vs. 2016 (percent of U.S. adults who do not buy packaged frozen hot meal items to be heated/microwaved)

Table 2-15 “Are any of the following especially important to you in choosing the foods you eat?”, 2016 (percent of U.S. adults)

Schwan: Consumers Have “Complicated Relationship” With Frozen

Table 2-16 Consumer Opinions About Frozen Food Products, by Purchase Frequency: 2016 (percent of U.S. frozen foods consumers)

Figure 2-9 Reasons for Buying Fewer Frozen Foods Products, 2016 (percent of U.S. frozen foods consumers)

FDA Issues Draft Guidance to Food Industry for Voluntary Sodium Reduction Targets

Table 2-17 Voluntary Sodium Reduction Goals for Selected Commercially Processed, Packaged, and Prepared Foods

Illustration 2-1 Menu Modeling: Feasibility, Nutritional Value and Affordability of Frozen Foods

PROJECTED MARKET GROWTH

Product Innovation Will Slow Frozen's Loss to Fresh

Table 2-18 Projected Overall Sales of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2016-2021 (millions of dollars, percent)

Table 2-19 Projected Overall Sales by Category of Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizers/Snacks, 2016 vs. 2021 (millions of dollars, percent change)

CHAPTER 3 THE MARKETERS

KEY POINTS

LEADING MARKETERS

Figure 3-1 Marketer Share of Sales for Frozen Dinners/Entrées, Pizzas, Side Dishes & Appetizer/Snacks, 2016 (percent share of dollar sales)

Table 3-1 Company Participation by Category, 2016

LEADING BRANDS AND USAGE TRENDS

Banquet Remains Tops in Household Frozen Dinner Usage

Table 3-2 Frozen Dinner Brands/Products Eaten Most Often in Last 30 Days, 2012-2016 (percent of U.S. households that eat frozen dinners)

Banquet Family Entrées the Most Frequently Consumed Frozen Entrées

Table 3-3 Frozen Main Course Brands/Products Eaten Most Often in Last 30 Days, 2012-2016 (percent of U.S. households that eat frozen main courses)

DiGiorno Controls the Highly Consolidated Frozen Pizza Segment

Table 3-4 Frozen Pizza Brands/Products Eaten Most Often in Last 30 Days, 2012-2016 (percent of U.S. households that eat frozen pizza)
Ore-Ida the Sole Frozen Potatoes Brand Eaten on a Frequent Basis

Table 3-5 Frozen Potatoes Brands/Products Eaten Most Often, 2012-2016 (percent of U.S. households that eat frozen potato products)

Hot Pockets Frequent Usage a Constant in Dynamic, Fragmented Hot Snacks Segment

Table 3-6 Frozen Hot Snacks Brands/Products Used Most Often in the Last 30 Days, 2012-2016 (percent of U.S. households that use frozen hot snacks)

Private Label Frozen Vegetables Consumed More Often Than National Brands

Table 3-7 Frozen Vegetables Brands/Products Eaten Most Often in the Last 30 Days, 2012-2016 (percent of U.S. households that eat frozen vegetables)

OVERVIEWS OF LEADING MARKETERS AND BRANDS

Nestlé
Table 3-8 Nestlé Retail Frozen Food Brands by Category, 2016

Conagra
Table 3-9 Conagra Retail Frozen Food Brands by Category, 2016

Illustration 3-1 “Now Serving a Better Banquet” Brand Restage

Schwan's
Table 3-10 Schwan Retail Frozen Food Brands by Category, 2016

Pinnacle Foods
Table 3-11 Pinnacle Retail Frozen Food Brands by Category, 2016

Kraft Heinz
Table 3-12 Kraft Heinz Retail Frozen Food Brands by Category, 2016

Amy's Kitchen
Table 3-13 Amy's Kitchen Retail Frozen Food Brands by Category, 2016

General Mills
Table 3-14 General Mills Retail Frozen Food Brands by Category, 2016

Bellisio Foods
Table 3-15 Bellisio Retail Frozen Food Brands by Category, 2016

Tyson/Hillshire
Table 3-16 Tyson/Hillshire Retail Frozen Food Brands by Category, 2016

Bueno Foods (El Encanto, Inc.)
Table 3-17 Bueno Foods (El Encanto, Inc.) Frozen Food Brands by Category, 2016

OTHER KEY MARKETERS

B&G Foods
Ajinomoto Windsor Foods
Gold Star Chili
J&J Snack Foods
On-Cor Frozen Foods
Ruíz Foods
Skyline
Tabatchnick Frozen Soups
Willow Tree Farm

MEDIA, ADVERTISING, AND PROMOTIONS

B&G Re-Introduces Green Giant With “The Giant Awakens” Theme
Illustration 3-2 B&G Foods “The Giant Awakens” Ad

Conagra Romances Women Consumers
Illustration 3-3 Advertisement for Healthy Choice Simply Cafe Steamers

Nestlé Touches All the Bases With Fit Kitchen
Illustration 3-4 Scenes From Advertisement for Stouffer's Fit Kitchen Frozen Meals

Bueno Foods Celebrates Anniversary With Free Cookbook
Illustration 3-5 Bueno Foods 65th Anniversary Cookbook

Schwan's Reminds Consumers “Life Is Delicious”
Illustration 3-6 Bon Appetit's “Life Is Delicious” Ads

Bellasio Takes to Twitter for Eat!2.0
Illustration 3-7 Eat!2.0 on Twitter

CHAPTER 4 PRODUCT TRENDS

KEY POINTS

PRODUCT TRENDS

CLEAN LABEL

Stouffer's "Kitchen Cupboard" Effort Promises Fewer, Simpler, Familiar Ingredients
Illustration 4-1 Stouffer's Lasagna with Meat & Sauce

Healthy Choice Simply Caf Steamers Feature Clean Label, On-Trend Recipes
Illustration on 4-2 Healthy Choice Simply Caf Steamers with organic ingredients

Evol Invites You to “Love What You Eat”
Illustration 4-3 Evol Fajita Cups and Veggie Cups
CUISINES OF THE WORLD
Bellisio's EAT! Frozen Entrées Offer Global, Adventurous Flavors
Illustration 4-4 Bellisio EAT! Frozen Entrées
Lean Cuisine's Limited-Time Entrées Inspired by International Culinary Trends
Illustration 4-5 Lean Cuisine Limited Edition Southwest-Style Potato Bake
Mouth Meets South: First-Ever Packaged Frozen Soul Food Meals
Illustration 4-6 Mouth Meets South Frozen Meals
SPECIAL DIETARY PREFERENCES
Illustration 4-7 Daiya Supreme Pizza with Meatless Sausage
Illustration 4-8 MorningStar Farms Japanese Soba Noodles Veggie Bowls
MAKING VEGGIES RELEVANT AGAIN
Illustration 4-9 Boulder Canyon Riced Sweet Potato
Illustration 4-10 Tommy's Superfoods Seasoned Root Fusion
Table 4-1 Selected New Frozen Food Products: Dinners and Entrées
Table 4-2 Selected New Frozen Food Products: Pizza
Table 4-3 Selected New Frozen Food Products: Side Dishes
Table 4-4 Selected New Frozen Food Products: Appetizers and Snacks
CHAPTER 5 RETAIL AND FOODSERVICE TRENDS
KEY POINTS
Supermarkets by Far the Dominant Channel for Frozen Food Spending
Table 5-1 Retail Channels Where Packaged Frozen Hot Meal Items Are Purchased (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Table 5-2 Retail Channels Where Packaged Frozen Hot Meal Items Are Purchased, by Share of Frozen Food Spending, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Table 5-3 Share of Frozen Food Spending Within Retail Channels, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Private Label Plays a Significant Role in Some Frozen Food Segments
Table 5-4 Store Brand Usage of Selected Frozen Food Products in Last 30 Days, 2012-2016 (percent of U.S. households that consume the product)
Schwan's: Retailers Can Make the Frozen Aisle a Linger-Worthy Destination
NATIONAL FROZEN & REFRIGERATED FOODS ASSOCIATION EMPHASIZES QUALITY AND FRESHNESS TO PROMOTE FROZEN .. 113
CHAPTER 6 CONSUMER TRENDS
KEY POINTS
FROZEN FOODS CONSUMPTION TRENDS
Over Half of U.S. Households Use Frozen Vegetables, Pizza, Potatoes
Table 6-1 Household Use of Frozen Dinners, Entrées, Pizzas, Snacks, and Vegetables, 2016 (percent of U.S. households)
Age, Race, Presence of Children Strong Predictors of Use
Table 6-2 Usage Indexes for Frozen Dinners, Entrées, Pizzas, Snacks, or Vegetables: By Demographic Segment, 2016 (U.S. households)
Table 6-3 Usage Indexes for Frozen Dinners, Entrées, Pizzas, Snacks, or Vegetables: By Children in Household, 2016 (U.S. households)
African Americans, Households With Teens Are Heaviest Users of Frozen Dinners
Figure 6-1 Packages of Frozen Dinners Eaten in Last 30 Days, 2016 (percent of households that use frozen dinners)
Table 6-4 Demographics of Households Consuming 5+ Packages Frozen Dinners in Last 30 Days, 2016 (index of households that use frozen dinners)
Nine in 10 Consumers Buy Packaged Frozen Hot Meal Items
Figure 6-2 Purchase Rate for Frozen Hot Meal Items, 2016 (percent of U.S. adults)
Table 6-5 Increased Purchasing of Packaged Frozen Hot Meal Items, by Category, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure 6-3 Increased Purchasing of Packaged Frozen Dinners/Entrées, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure 6-4 Increased Purchasing of Packaged Frozen Pizzas, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure 6-5 Increased Purchasing of Packaged Frozen Appetizers/Snacks, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure 6-6 Increased Purchasing of Packaged Frozen Vegetables/Side Dishes, 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Half of Frozen Foods Consumers Keep Hot Meal Items on Hand
Table 6-6 “Do you keep any of the following packaged frozen products in your freezer, even if not necessarily
for using soon?", 2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Frozen Foods Consumer Attitudes and Opinions
Quality Remains Most Important Factor in Purchase Decisions
Table 6-7 Importance of Various Factors in Frozen Hot Meal Item Purchasing Decisions, 2016 (percent of U.S.
adults who buy packaged frozen hot meal items to be heated/microwaved)

Frozen Considered Most Convenient, Affordable Type of Hot Meal Item
Table 6-8 Opinions About Frozen vs. Other Types of Packaged Hot Meal Items, 2016 (percent of U.S. adults
who buy packaged frozen hot meal items to be heated/microwaved)

Figure-6-7 "Which type of packaged items for hot meals are typically the most affordable?,” 2016 (percent of
U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure-6-8 "Which type of packaged items for hot meals are typically the highest quality?,” 2016 (percent of
U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure-6-9 "Which type of packaged items for hot meals typically have the fewest additives or preservatives?,”
2016 (percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)
Figure-6-10 “Which type of packaged items for hot meals are typically the most convenient to prepare?”, 2016
(percent of U.S. adults who buy packaged frozen hot meal items to be heated/microwaved)

Frozen Foods Consumers Are Busy and Strapped for Time
Table 6-9 Health, Food, and Shopping Attitudes, by Type of Frozen Food Used, 2016 (index of frozen foods
households)
Concern About Nutritional Value of Frozen Skews Upscale
Table 6-10 Agreement with Statement: “Most Frozen Dinners Have Little Nutritional Value," by Demographic
Segment, 2016 (index of U.S. adults)


Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Web Address: http://www.researchandmarkets.com/reports/4071590/
Office Code: SC2GIWSL

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>USD 3995</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr</th>
<th>Mrs</th>
<th>Dr</th>
<th>Miss</th>
<th>Ms</th>
<th>Prof</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td>___________________________</td>
<td>Last Name:</td>
<td>___________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ___________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World