

ABOUT

AFFI AMERICAN
FROZEN FOOD
INSTITUTE

Hello
& WELCOME!



OVERVIEW

Meet Our Team



Strategic Plan & Goals



Market Dynamics



Opportunities for Engagement



Meet
Our
Team

MARKET OVERVIEW



The U.S. Frozen Food Market is the largest in the world (\$78 billion)



Nearly half of American households have a secondary freezer beyond their primary refrigerator/freezer.



Based on AFFI research, quality, affordability, and food waste messaging present an opportunity to enhance the story of frozen with policy and consumer influencers.



Frozen food unit sales were down 0.5% in January 2024 compared to a year ago. Frozen pizza, processed meat, fruit, snacks and baked goods displayed unit growth.

FROZEN FRUITS & VEGETABLES

January 2024	Dollars	\$ vs. YA	Units	Units vs. YA	Volume (lbs)	Lbs % vs. YA
Total frozen fruits & vegetables	\$721M	+5.3%	209M	-2.1%	305M	-0.2%
Fries	\$165M	+9.5%	33.4M	-3.6%	68.4M	-2.7%
Fruit	\$150M	+3.7%	24.0M	+0.6%	40.3M	+5.7%
Mixed vegetables	\$83M	-2.1%	36.1M	-1.8%	37.3M	-0.3%
Broccoli	\$45M	-1.5%	20.0M	-4.8%	20.0M	-3.8%
Taters	\$45M	+21.5%	8.1M	-5.1%	17.9M	-1.8%
Hashbrowns	\$43M	+32.0%	10.2M	+12.9%	18.0M	+11.5%
Beans	\$32M	+4.9%	14.1M	+0.6%	12.1M	+0.7%
Peas	\$23M	+3.9%	11.8M	+0.4%	10.8M	+1.4%
Corn	\$23M	+1.6%	12.0M	-1.1%	11.1M	-0.5%
Plain potatoes	\$19M	+22.0%	4.9M	+3.6%	8.4M	-1.2%
Corn on the cob	\$15M	+3.8%	3.4M	+2.8%	33.2M	+2.1%
Spinach	\$12M	+2.3%	6.2M	+0.1%	4.7M	-1.4%
Prepared vegetables	\$11M	-17.5%	3.5M	-21.2%	3.5M	-18.1%
Onion rings	\$9.9M	-6.2%	2.1M	-11.7%	2.6M	-11.5%
Squash/zucchini	\$3.3M	-21.7%	1.1M	-20.8%	0.8M	-21.6%
Carrots	\$3.2M	+10.0%	1.9M	+7.8%	1.5M	+8.5%
Onions	\$3.2M	+19.5%	1.6M	+14.0%	1.2M	+15.5%

Source: Circana, Integrated Fresh, Total US, MULO



More
Than



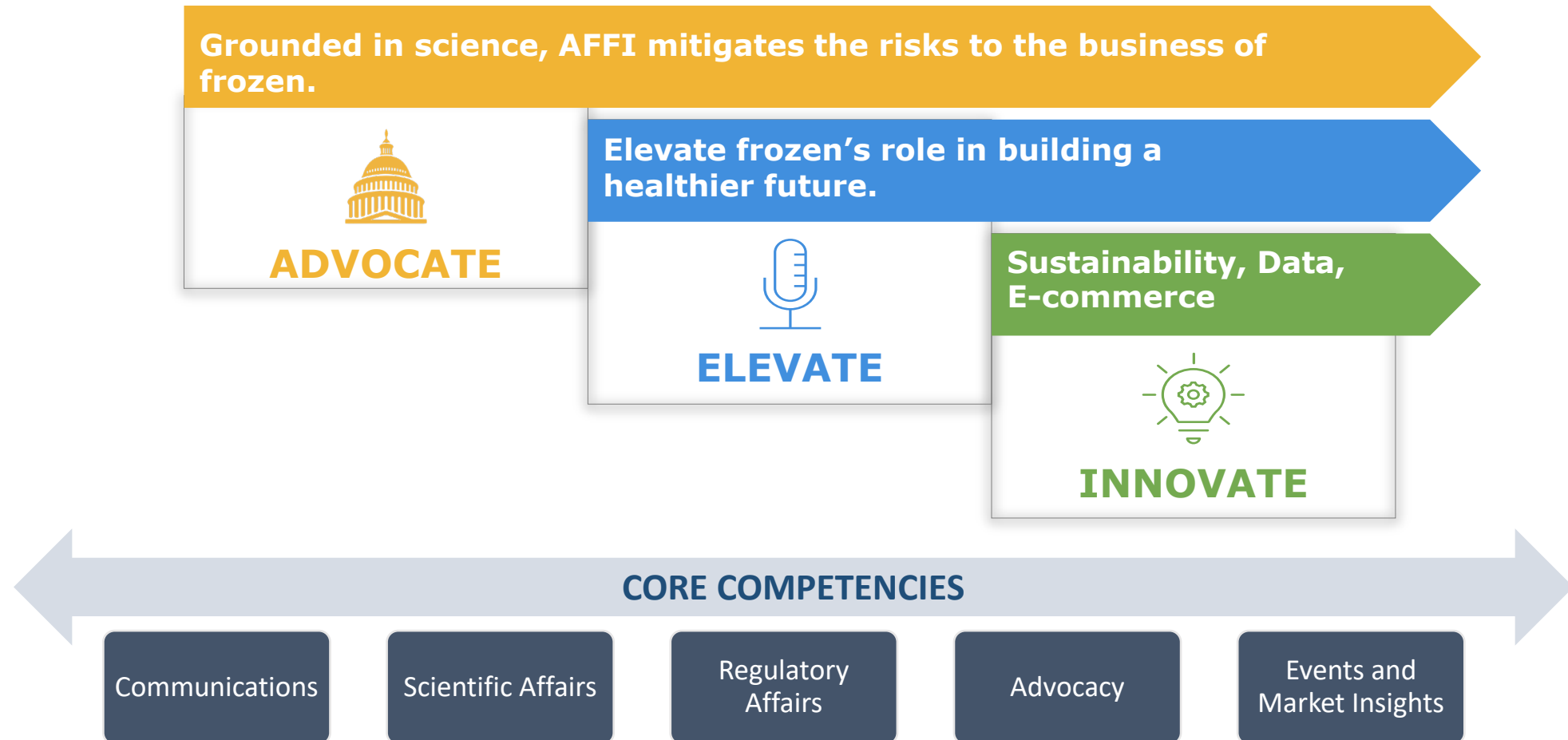
2021-2024 Strategic Plan

Vision

Frozen foods are essential in a dynamic marketplace.

Mission

AFFI advances the interest of all segments of the frozen food and beverage industry.

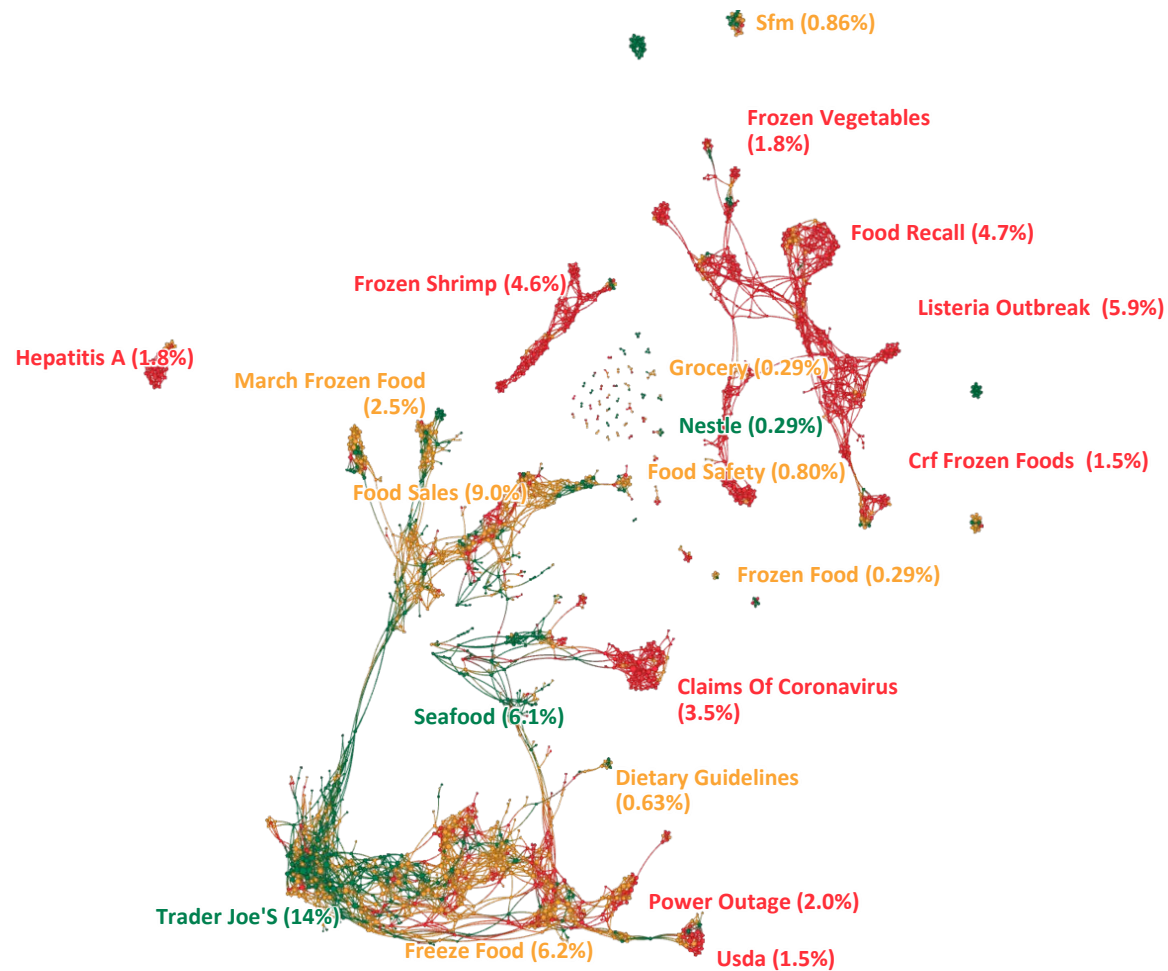




Grounded in science, AFFI mitigates the risks to the business of frozen.

Media Sentiment Report 2015-2023

News article network with 1748 stories. Colored by sentiment summary. Sized by degree. Labeled by clusters.



Why is food safety our #1 focus? Food recalls, Listeria, and Hepatitis A outbreaks negatively impact the reputation of frozen foods and contribute to misperceptions about the category.

Sentiment summary	
● negative	41%
● neutral	36%
● positive	23%

AFFI's Advocacy Issues

Why does it matter to your business?	Issues
<p>AFFI's work helps reduce unnecessary recalls and reputational damage by ensuring that robust regulatory policy and scientifically-validated tools are used for compliance. AFFI creates the necessary resources to enable frozen food companies to drive continuous improvement of facilities and their practices.</p>	<p>Microbiological Food Safety Issues</p> <ul style="list-style-type: none">• Listeria monocytogenes• Enteric viruses
<p>AFFI's work ensures frozen food facilities have the license to exercise flexibility in their food safety preventive controls programs for compliance with regulations such as FSMA rules.</p>	<p>FDA Reform</p>
<p>AFFI's work on regulatory reform ensures regulatory decisions regarding food ingredients and chemicals are based on a combination of scientific research, risk assessments, and considerations for public health and safety. In addition, AFFI is working to ensure FDA credibly leads the assessment of ingredient safety to avoid a patchwork of regulations in the states.</p>	<p>Chemical/Ingredient Food Safety Issues</p> <ul style="list-style-type: none">• Phthalates• Heavy metals• Food additives/food ingredient assessments
<p>AFFI is pushing government to maintain and open new market opportunities for frozen foods through GusNIP, Produce Prescription, other feeding/purchase programs, WIC, School Meals, and SNAP. The reputation of frozen food (quality, sustainability, accessibility) is integral to these efforts.</p>	<p>Nutrition and Feeding Programs</p>
<p>AFFI is building a positive, research-based narrative for frozen foods around the safety, quality, sustainability and accessibility with regulatory and policy influencers. AFFI is responding to negative media sentiment that paint frozen foods with a broad brush and labels subcategories as UPFs. AFFI partners with CBA and other associations to maximize efficiency and efficacy for frozen.</p>	<p>Ultra-processed foods</p>
<p>AFFI's work has and continues to delay FDA from releasing long-term sodium targets without assurances that they will be widely accepted by consumers, provide a public health benefit and allow companies sufficient time for implementation of these targets.</p>	<p>Sodium</p>



Elevating frozen's role in building a healthier future.

Bias toward fresh in Federal Feeding Programs

- 86% of GusNIP funding in 2023 went to support fresh produce programs. USDA produce prescription program ONLY applies to fresh.
- By statute, the Women, Infant and Children Feeding Program (WIC) prioritizes fresh.
- Frozen foods excluded from emergency food boxes
- School programs – there are plans to update the school food programs with very restrictive nutritional standards that could potentially eliminate many frozen food products from being included.



Who defines frozen's role in building a healthier future?



“And you can get more healthier options instead of getting *frozen meals* or Hamburger Helper that’s loaded with sodium and makes us gain weight.”



United States Representative
ROSA DELAURO
Representing the Third District of Connecticut



“What did you eat for breakfast? Did it come out of a package? Did you pop it in a microwave and heat it for one minute? If so, that’s why we’re here today.”

Xavier Becerra
Secretary
Department of Health and Human Services



- ✓ Dietary Guidelines
- ✓ “Healthy” label claim and Front-of-Pack labeling
- ✓ School Meals
- ✓ WIC Reauthorization

Government Perception = Policy Implications

Strategic Approach



Tell a new/newsworthy story... about QUALITY



Support the new story with strong evidence – flavor, texture, nutrition and freshness science



Target new audiences who are motivated to amplify our quality story



Surround policy makers with positive consumer messaging. Lean into food waste with Congress/regulatory agencies.



Drive a positive sustainability profile for the frozen food industry.

Guidehouse and AFFI Partnership

AFFI members have exclusive access to Guidehouse's Supplier Leadership on Climate Transition (LOCT) training program to give companies the capability to accelerate decarbonization efforts in their operations.

About the program:

- Online climate school (Supplier LOCT) is managed by global consultancy Guidehouse.
- Supplier LOCT gives companies the **skills to progress** through their climate journey.
- **Expert instructors** lead participants in a series of workshops on GHG tracking, setting GHG reduction goals, abatement, and disclosure.





Connecting the business of frozen.

AFFI 2024 Events



Event	Date(s)	Venue	Location	Primary Audience
AFFI-CON 2024	February 24-27	Manchester Grand Hyatt	San Diego	Executives, sales/marketing and procurement
AFFI Board of Directors Spring Meeting and Government Action Summit	April 11-12	Capitol Hill Club and Hogan Lovells	Washington, D.C.	Board of Directors
FBEC	April 16-19	Hotel Effie	Miramar Beach, FL	Environmental professionals
Frozen IQ	June 3-5	The Worthington Renaissance	Fort Worth, TX	Executive suite, sales/marketing, R&D
AFFI Board of Directors Fall Meeting	Sept. 23-24	Merchandise Mart	Chicago	Board of Directors
Frozen Food Manufacturers Scientific & Technical Conference ←NEW!	November	TBD	TBD	Food safety operations

Member Marketing Program

Home » Sponsorship Packages

A high-value brand awareness program that allows AFFI member companies to utilize AFFI's various marketing and communication channels to reach other members to share their product and service offerings.



Create a customized promotional package that leverages AFFI's trusted brand to grow your business.

We realize that every company is different and this extends into how they market themselves and conduct business with their customers. That's why the key word for our member marketing program is **customization**.

Explore the different levels of partnership and sponsorship available below and download the 2024 program brochure to view pricing details.



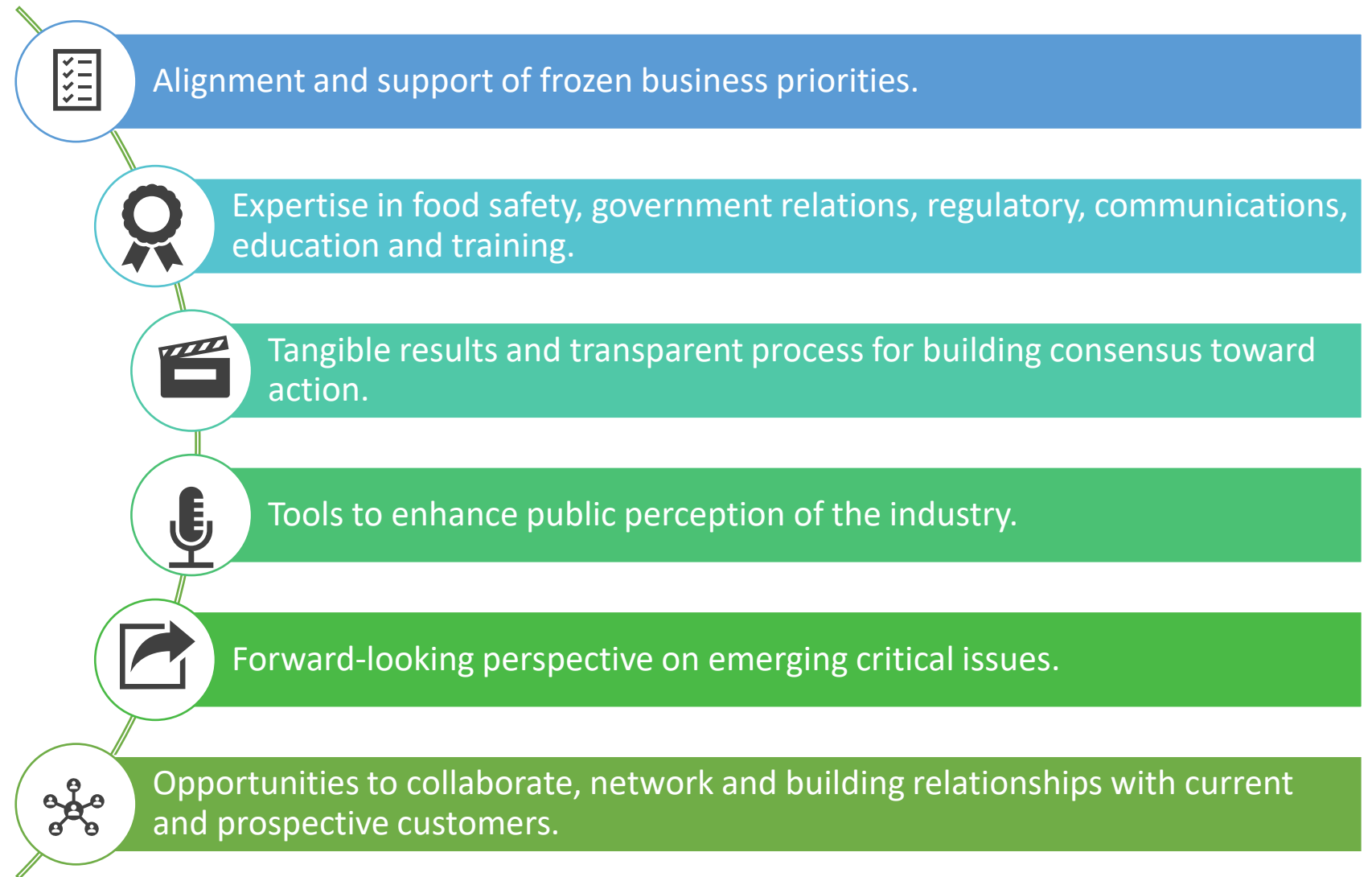
DOWNLOAD THE 2024 PROGRAM
BROCHURE



VIEW OUR 2023 ALLIANCE PARTNERS

Learn more at www.affi.org/sponsorship

What you get with an AFFI membership that others don't. AFFI delivers.....



questions