



2026 POWER OF FROZEN

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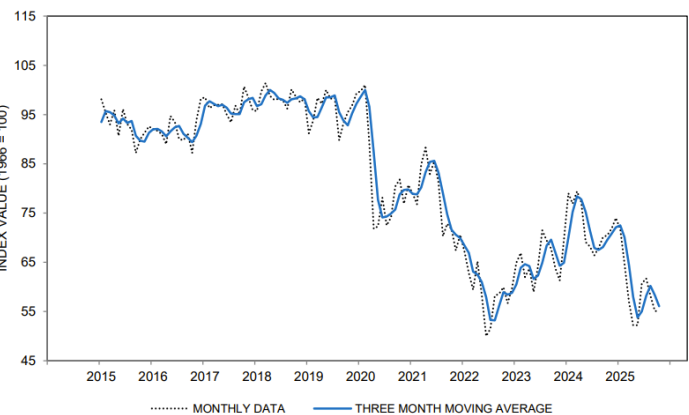


Five years of nonstop change and it isn't over yet

Consumers continue embracing money-saving strategies

Key economic indicators

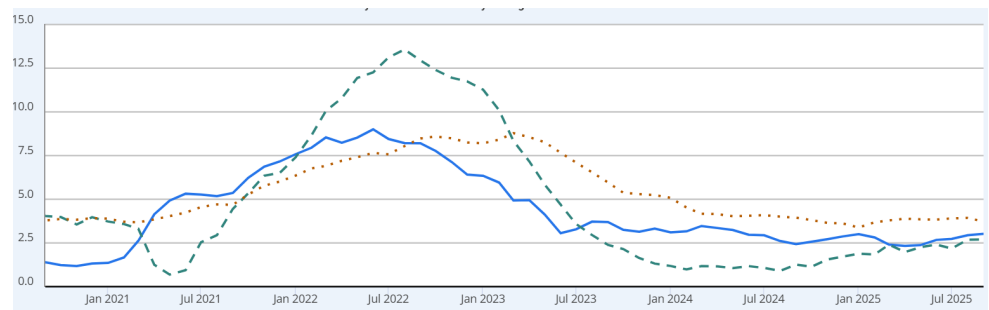
Consumer Sentiment Index | University of Michigan



53.1
December 2025

↓ **from 71.7**
In January 2025

Consumer Price Index | Five years ending Dec. 2025



Source: U.S. Bureau of Labor Statistics

- All items
- Food-at-home
- Food-away-from-home

December 2025

+2.4%

Food-at-home YOY

+4.1%

Food-away-from-home YOY

The top 10th percentile in household income
=
50% of total consumer spending

Inflation has touched every aisle in the grocery store

The average price for total food and beverages has risen 38.5% since 2019

Retail price per unit by department — 2025

									
	Total store	Frozen	Dry grocery	Dairy	Produce	Meat	Deli	Bakery	Seafood
Avg price/unit	\$4.29	\$5.29	\$3.91	\$2.80	\$7.45	\$6.25	\$3.86	\$10.54	\$3.97
Price vs. YA	+2.6%	+1.7%	+4.5%	+1.2%	+4.7%	+1.0%	+1.7%	+2.4%	+2.7%
Price vs. 2019	+10.6%	+13.6%	+13.0%	+3.7%	+10.9%	+5.4%	+11.3%	+1.2%	+13.6%

Source: Circana, Integrated Fresh, Total U.S., MULO+, 52 weeks ending 12/28/2025



Consumers are focused on home-prepared meals

Yet, financial pressure means retail sales have challenges of their own

Changes to the way you plan or prepare meals, snacks or beverages over the past year



91%

Made 1+ change
to the way they approach
meals/beverages



44%

Prepared more meals,
snacks or beverages at
home

Share of home-prepared meal occasions

87%

Of breakfast occasions

77%

Of lunch occasions

79%

Of dinner occasions

Food waste avoidance is the most common change

While 37% use more frozen foods, others scratch cook more often

Changes made to planning or preparing meals, snacks or beverages at home

- 39%** Use leftovers more often
- 38%** Make an effort to use perishable foods before they spoil
- 37%** Use more frozen, canned or boxed foods
- 35%** Cook more from scratch (vs. semi- or fully-prepared foods)
- 34%** Do more meal planning
- 30%** Make dishes using fewer/simpler ingredients
- 29%** Buy more ready-to-cook and ready-to-eat meals/ingredients
- 28%** Make dishes with lower-cost ingredients
- 28%** Focus on the main meal and less on appetizers or desserts



Market driven change has resulted in slowing unit sales

Frozen foods trail the total store dollar and unit growth averages slightly

Dollar and unit sales by department

									
	Total store	Frozen	Dry grocery	Dairy	Produce	Meat	Deli	Bakery	Seafood
Dollar sales	\$958B	\$88B	\$473B	\$107B	\$97B	\$112B	\$56B	\$49B	\$9B
Dollars vs. YA	+3.3%	+1.9%	+3.1%	+5.9%	+2.7%	+6.8%	+2.7%	+0.3%	+1.7%
Units vs. YA	+0.6%	+0.2%	0.3%	+1.4%	+1.5%	+1.9%	+1.7%	-1.4%	-0.6%

Source: Circana, Integrated Fresh, Total U.S., MULO+, 52 weeks ending 12/28/2025

Frozen foods have witnessed historic dollar growth

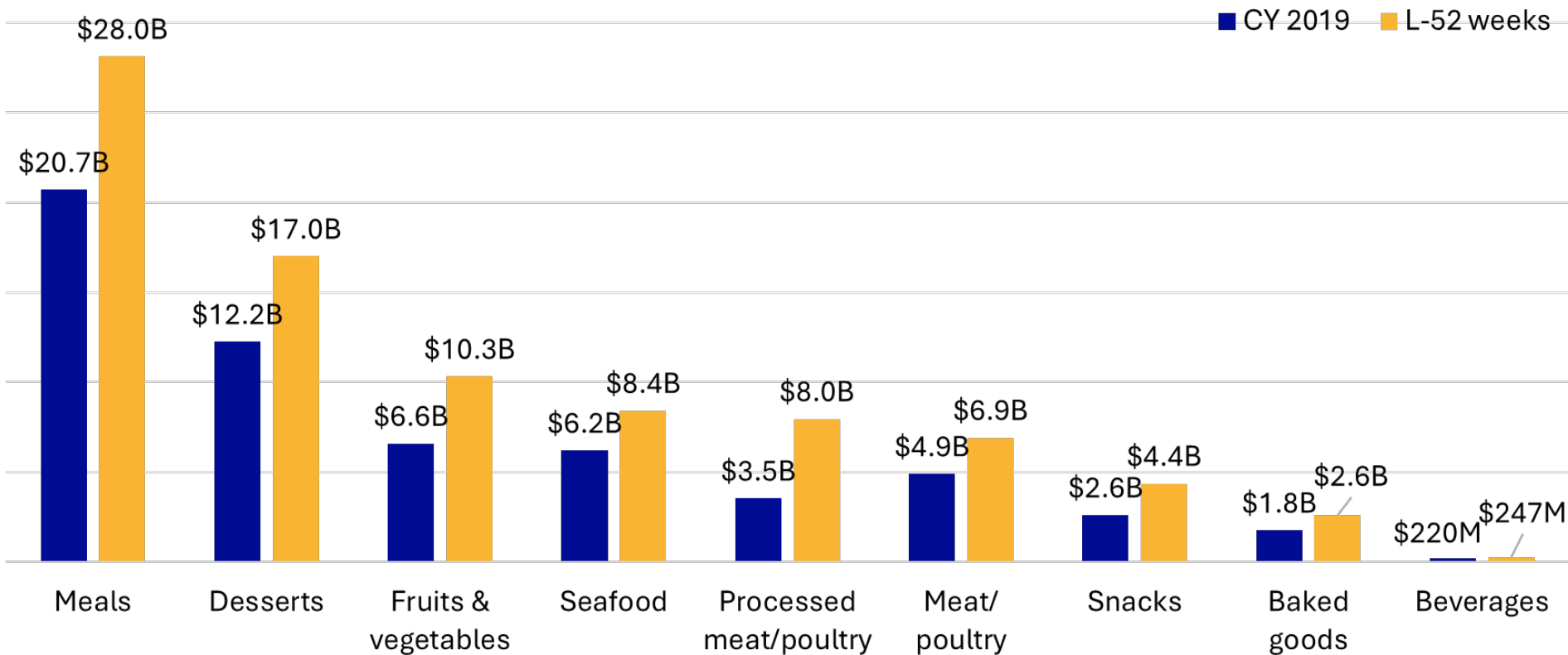
Combination of demand and inflationary growth

Frozen food department and category sales 2019 vs. 2025

Department

2019:
\$59.6B

2025:
\$87.6B



Source: Circana, MULO+, Total U.S., 2019 and 52 weeks ending 12/28/2025

Multi-year unit gains reflect sustained demand growth

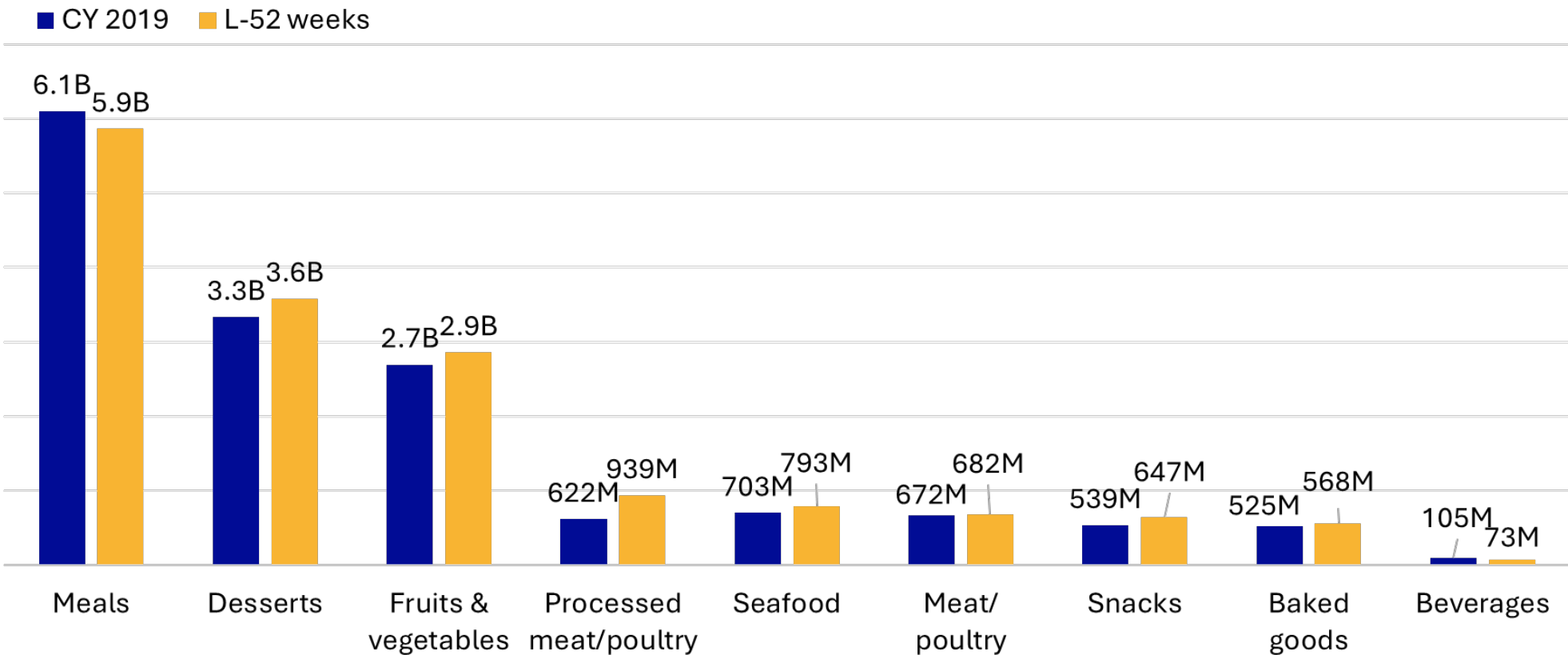
Nearly one billion more units sold annually compared with 2019

Frozen food department and category unit sales 2019 vs. 2025

Department

2019:
15.6B

2025:
16.6B

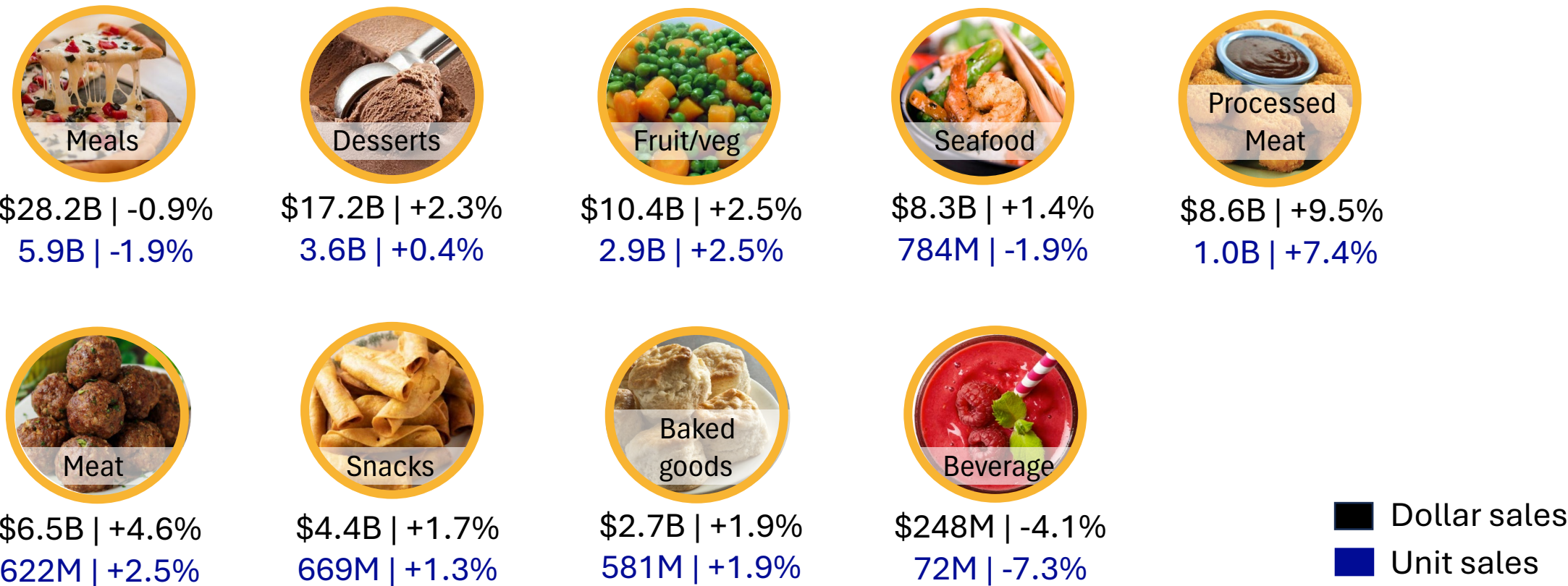


Source: Circana, MULO+, Total U.S., 2019 and 52 weeks ending 12/28/2025

Frozen fruits and vegetables fuel further growth

Processed meat added \$747 million in sales over the past year

Frozen food department and category unit sales — 2025



Source: Circana, MULO+, Total U.S., dollars and volume, 52 w.e. 12/28/2025 and change vs. year ago

Strong household engagement with shifting trip dynamics

Increase in visits partially offset by buying less per trip

Frozen food purchase dynamics



Households buying

98.8%

+0.1% vs. YA

+0.5% vs. 2YA



Trips/buyer/year

50.6x

+2.1% vs. YA

+3.5% vs. 2YA



Dollars per trip

\$14.11

+0.3% vs. YA

-0.4% vs. 2YA



Units per trip

2.9

-1.0% vs. YA

-1.5% vs. 2YA



Annual \$ per buyer

\$714

+2.4% vs. YA

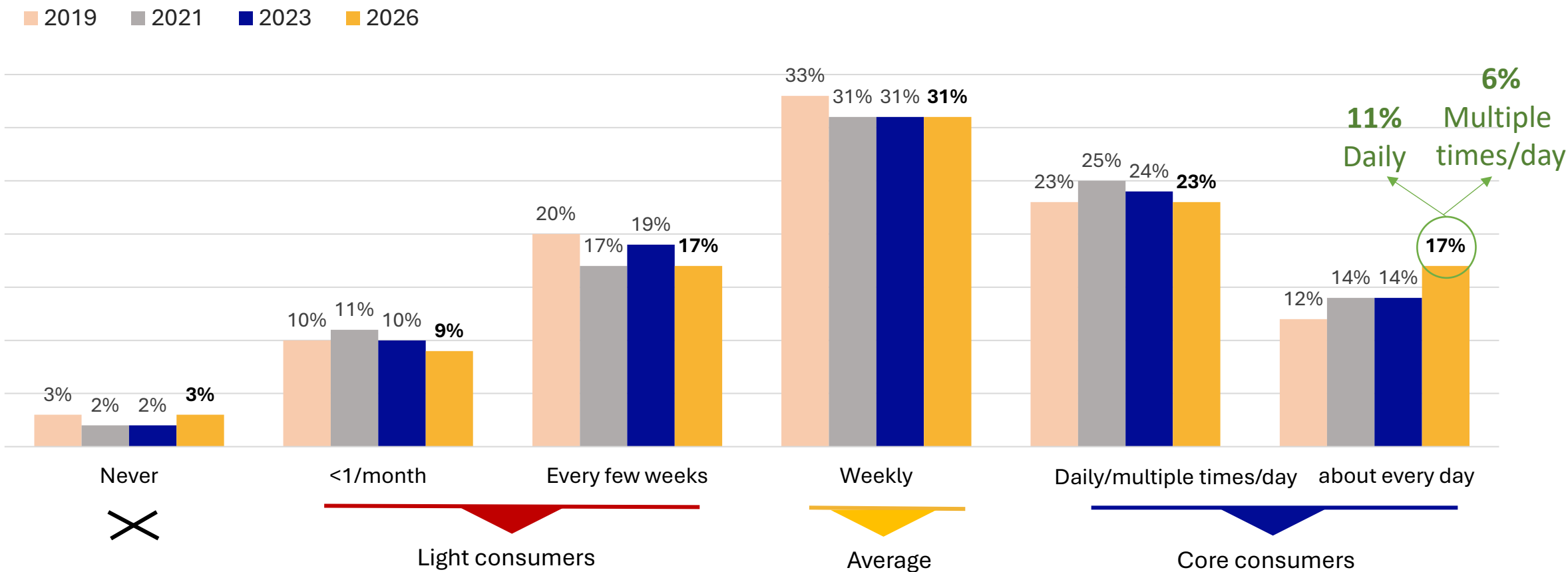
+3.1% vs. 3YA

Source: Circana, Household Panel, All Outlets, 52 weeks ending 10/5/2025

Not all frozen food consumers are equal

The share of core frozen food consumers has risen five points since 2019

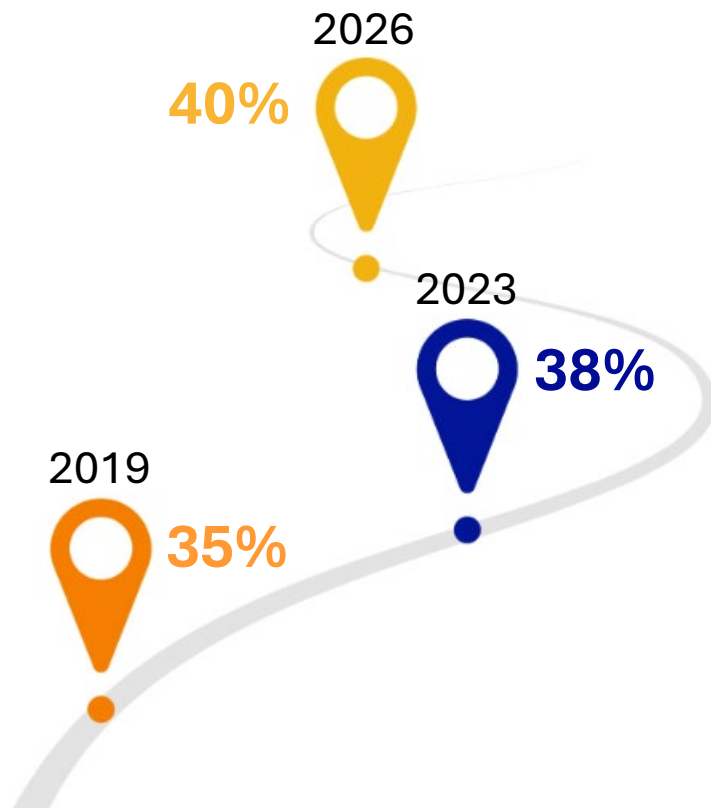
Frequency of consuming frozen foods (% of shoppers)



The core frozen food consumer profile

Their perceptions and habits form the blueprint for further category sales growth

Share and profile of **core** frozen food consumers:



More likely to live in **suburban** areas

Presence of tweens and teens. Strong engagement with multi-serve entrees, meat, snacks and breakfast

Think highly of the quality, healthfulness and freshness of frozen food

Emphasize **ingredient, health and production claims**

Have upgraded their **freezer capacity**



Digitally inspired, they like to **try new frozen food** items and increased reliance over the past year

Larger households, particularly **Gen X and Older Millennials**

More frequently shop at **supercenters, clubs** and **online**

Represent **all income levels** with dollar distribution skewing toward higher incomes

Buy across **more categories** for **planned occasions** and as **last-minute options**

Core consumers shop far more categories

Frozen entrees, breakfast and potato items are key categories for improved engagement

Frozen food categories purchased in the past six months

	All	Light	Core
Ice cream	91%	85%	93%
Pizza	88%	83%	92%
Vegetables	87%	81%	88%
Meat/poultry (sausage, hamburger, chicken nuggets, etc.)	85%	75%	89%
Single-serve entrees (lasagna, lo mein, etc.)	80%	65%	87%
Breakfast items (waffles, pancakes, etc.)	76%	60%	83%
Potato items (fries, taters, etc.)	74%	56%	82%
Multi-serve entrees (lasagna, lo mein, etc.)	72%	55%	80%
Appetizers/snacks	70%	56%	77%
Fruits	67%	58%	71%
Seafood (shrimp, salmon, crab, etc.)	67%	56%	71%
Sides (rice, pasta)	59%	44%	64%
Pie, cake and other dessert items (excluding ice cream)	64%	48%	71%
Meat alternatives	9%	8%	10%



■ Significantly over indexes ■ Significantly under indexes

Dollar distribution shows the same demographic gaps

Older Millennials and Gen X are driving sales and growth

Demographics of frozen food consumers by dollar index (share of dollars divided by share of population)

■ More than fair share ■ Less than fair share

Generation/age

82	Gen Z
93	Younger Millennials
110	Older Millennials
105	Gen X
96	Boomers
84	Silent Generation

Income

93	SNAP-eligible
93	Lower income
102	Average income
104	Higher income

Household size

73	One person
96	Two people
114	Three people
124	Four people
133	Five or more people

Race

103	Caucasian
98	African American
84	Asian

Kids in household

91	No kids
122	Kids



Source: Circana, Household Panel, All Outlets, 52 weeks ending 10/5/2025

Young shopper engagement drove processed meat gains

Fruit and vegetables have opportunities with Gen Z and adult-only households

Demographics of frozen food consumers by dollar index (share of dollars divided by share of population)

				
Generation	Meals	Fruit/vegetables	Meat/poultry	Processed meat/poultry*
Gen Z	82	80	81	103
Younger Millennials	91	97	92	127
Older Millennials	108	112	120	141
Gen X	105	106	114	108
Boomers	99	96	88	67
Silent Generation	98	71	61	39
Kids in household				
No kids	93	91	88	73
Kids	118	122	129	168

■ More than fair share

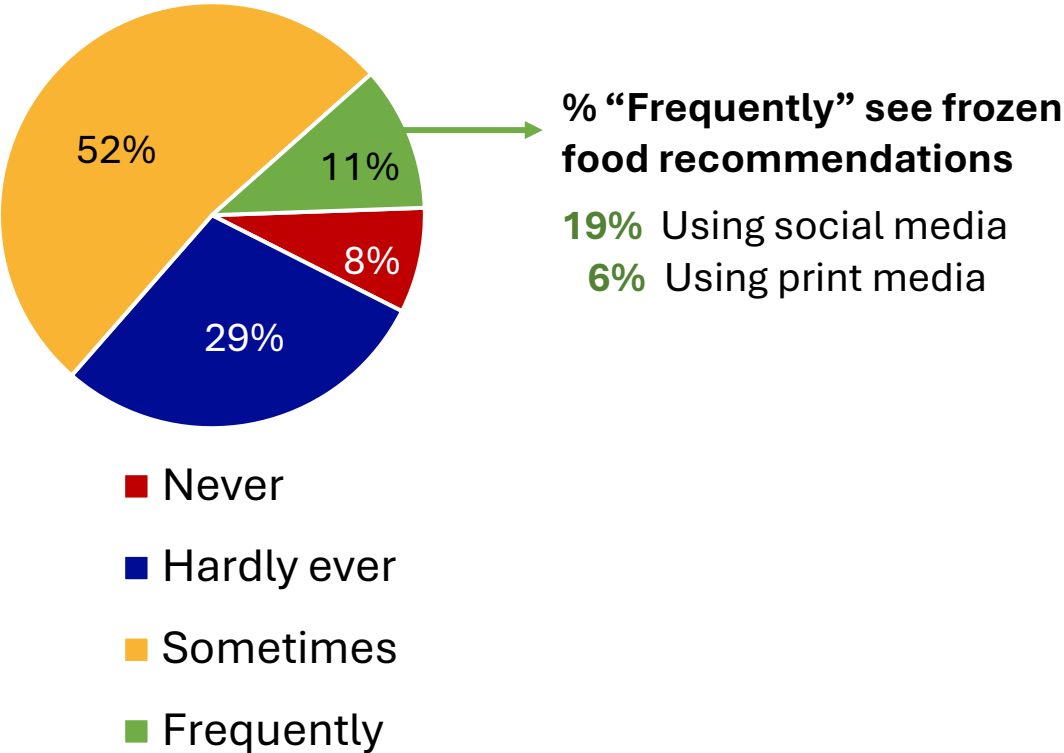
■ Less than fair share

Source: Circana, Household Panel, All Outlets, 52 weeks ending 10/5/2025 | * Processed meat and poultry includes chicken nuggets, chicken strips, sausage, etc.

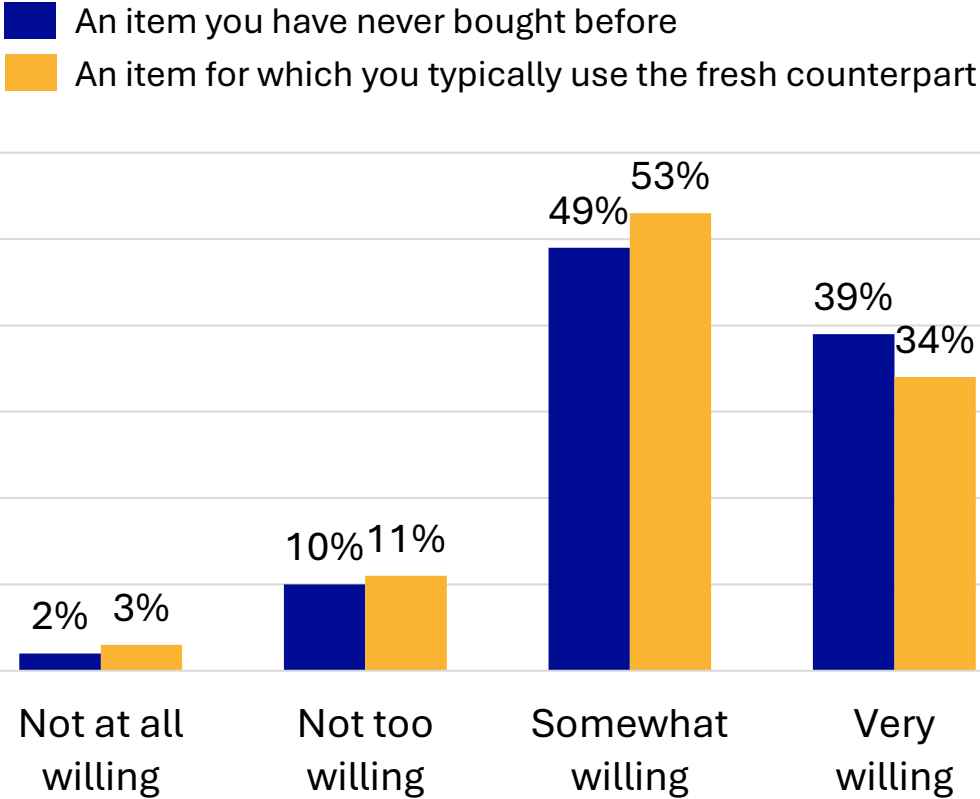
Frozen foods are making inroads via digital recipe inspiration

Recipe recommendations can drive trial and fresh-to-frozen substitution

Frequency of frozen food/ingredient recommendations



Willingness to try a frozen food item if recommended by your trusted recipe source...

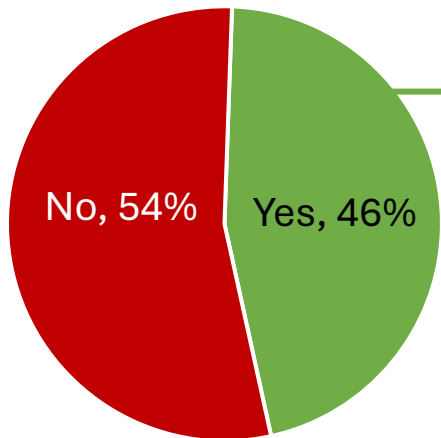


Social media is a powerful trial catalyst

TikTok trends and Instagram influencers help drive sales trends

Have purchased frozen food(s) because of social media or influencers

[if they use social media]



% "Yes" by generation

69% Gen Z
57% Millennials
49% Gen X
29% Boomers

Examples of social-media driven frozen food exploration

"Frozen dumplings and momos trending on TikTok."

"Korean beef bulgogi recommended by an influencer on Insta."

"Beef patties and chicken tacos."

"Cauliflower pizza crust, bites and fries."

"I saw an influencer use frozen fruit for pie and thought that was smart."

"Frozen peaches for smoothies."

"I bought Tyson frozen chicken patties after seeing it on Instagram."

"Frozen vegetable medleys for quick stir fries."

"Mochi ice cream TikTok."

"Frozen mixed vegetables to make my own pot pie I saw on TikTok."

"The hwachae drink with frozen fruit. Yum!"

"Fruit roll-up ice cream."

Sustained consumer interest in trying new products

Core consumers most actively look to expand beyond routine purchases

71%

of shoppers occasionally (55%) or frequently (17%) look for frozen food items they had not bought before



Pictures: 210 Analytics



Prompts to purchase a new frozen food

[if occasionally/frequently look for new items]

- 54% Good price, sale or promotion
- 40% Recommendation from a friend or family member
- 39% A new item from a familiar or trusted brand
- 29% Convenient format or portion size (single-serve, steam-in bag, etc.)
- 27% Being bored with the same old
- 25% Attractive packaging or photography
- 25% Positive review or rating online
- 24% Sampling/cooking demonstration
- 24% Recipe or serving suggestion on pack or online
- 22% “New” called out on the package or shelf
- 22% Limited time flavor or item
- 21% TikTok, Instagram or other social media trend
- 21% On-pack nutrition callouts/claims
- 17% On-pack claims avoiding the use of certain ingredients/additives
- 16% Recommendation from an influencer

Taste, food waste and cost are key trial barriers

82% are interested in preparation tips that help create different textures

39%

of shoppers never (5%) or rarely (24%) look for frozen food items they had not bought before



Reasons for not looking for new frozen food items

[If never or rarely exploring new items]

- 41% Afraid I/we won't like the taste
- 38% Worried about wasting food if I/we don't like it
- 36% Some frozen food items are too expensive
- 35% Simply a creature of habit, I stick with what I know
- 27% Don't have the money to experiment with something new
- 25% Afraid I/we won't like the texture
- 14% Lack of freezer space
- 11% Not sure how to prepare or cook it
- 9% Don't like to try new things

Pictures: 210 Analytics

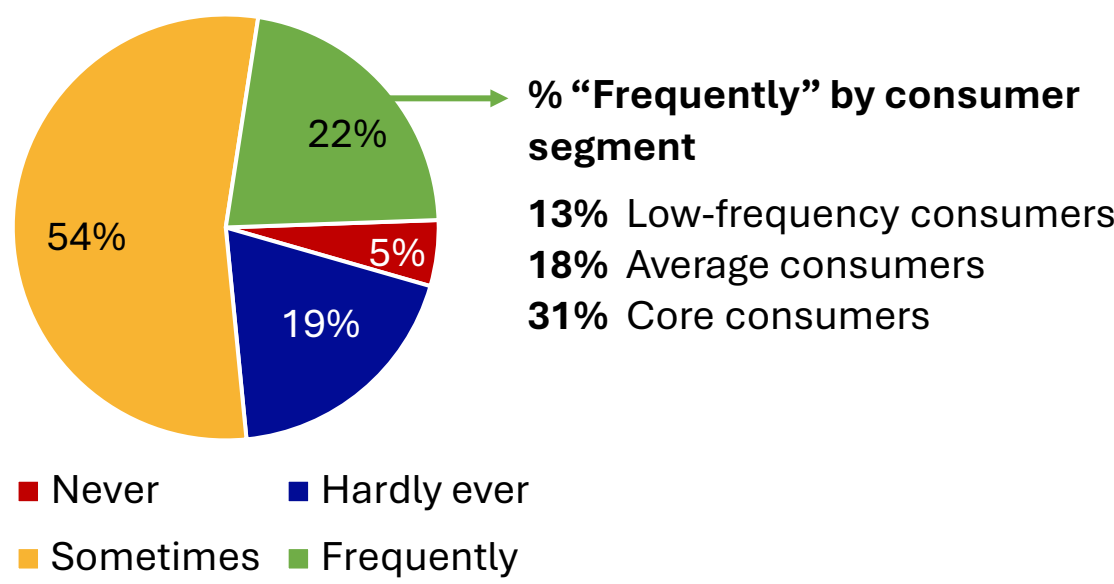
Meal Preparation & Ingredients



Blending fresh and frozen can fuel new meal occasions

Core consumers are more likely to integrate frozen ingredients

Frequency of using both fresh and frozen ingredients in the same meal



Examples of mixing fresh and frozen foods

Examples of mixing fresh and frozen foods:

- "Frozen berries on homemade pudding."
- "Chicken pot pie with frozen and fresh veggies."
- "Fresh meat and frozen veggies."
- "Shepherd's pie."
- "Add cheese and mushrooms to frozen pizza."
- "BBQ chicken with frozen veggies and mac & cheese."
- "Beef stew."
- "A stir-fry with fresh vegetables and frozen shrimp."
- "Chicken and broccoli stir-fry"
- "A salad and a frozen pizza."
- "A beef or chicken casserole."
- "A homemade soup using fresh herbs and onions, along with frozen chicken, corn and green beans."
- "Smoothie with frozen fruit and yogurt."
- "Fried rice."
- "Blueberry muffins."
- "Chicken soup."

From backup solution to part of the meal plan

The role of frozen food among core consumers leaves important clues for growth

Descriptions of household's use of frozen food

	2026	Light consumers	Core consumers
Nice to have as a backup solution	89%	85%	89%
An “out-of-time, need-something-quick” solution	88%	84%	89%
Help save money because of longer shelf life	85%	80%	89%
Hold me over in between trips when fresh runs out	83%	76%	84%
Easy solution for foods I don't know how/want to make	81%	74%	84%
Easy to cater to everyone's needs/preferences	81%	67%	87%
Allow me to try a new food or cuisine	78%	67%	84%
Bought with a specific meal/day in mind	77%	53%	89%



■ Significantly over indexes
■ Significantly under indexes

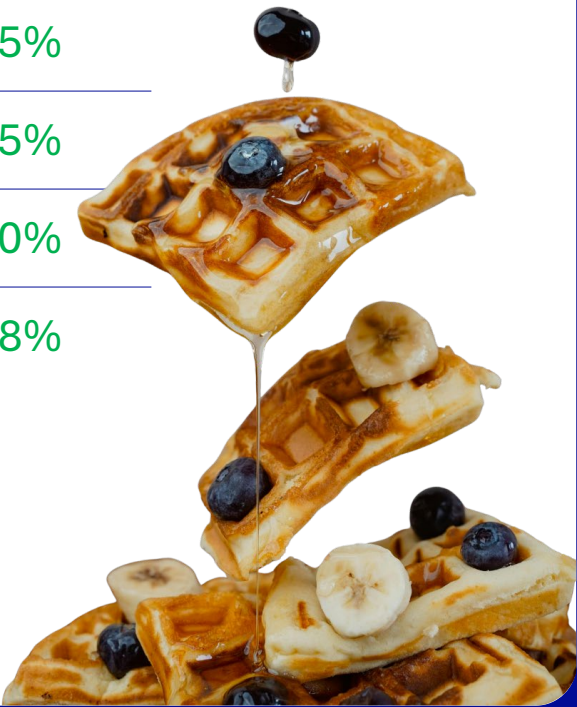
Parents desire fast prep and kid-friendly meals/snacks

Core consumer interest is strong across all meal solutions

Interest in frozen meals and ingredients providing/addressing...

% Very interested				
	All	Parents	Light consumers	Core consumers
Fast prep: from freezer to plate in under 20 minutes	57%	62%	40%	65%
Premium, restaurant-quality meals	46%	53%	32%	55%
Global cuisines with bold, exciting flavors	36%	45%	24%	45%
Kid-friendly meals and snacks	32%	51%	23%	40%
Lunchbox items	29%	41%	19%	38%

- Significantly over indexes
- Significantly under indexes



Convenience comes in many formats

From easy meal planning to reducing the number of preparation steps



Pictures: 210 Analytics

Holiday and entertaining cross-merchandising

Two examples of consumers being less price-sensitive



Pictures: 210 Analytics

Italian and Mexican dominate global-cuisine interest

Generational differences in mid-tier global cuisines

Types of global cuisines of interest whether frozen meals or ingredients [if interested in global cuisines]

72%	Italian (pizza, pasta, lasagna, risotto, etc.)
68%	LATAM/Mexican (burritos, tacos, taquitos, etc.)
63%	Chinese (fried rice, dumplings, lo mein, etc.)
44%	Japanese (ramen, gyoza, teriyaki, etc.)
42%	French (quiche, croissants, etc.)
37%	Mediterranean/Greek (falafel, gyros/shawarma, etc.)
32%	Thai (curries, pad Thai, etc.)
30%	Korean (Bibimbap, bulgogi, etc.)
29%	Indian (Tikka masala, curries, naan, etc.)
29%	Vietnamese (pho, spring rolls, etc.)
28%	Middle Eastern (kebabs, kofta, pilaf, etc.)
26%	Global fusion/street food (bao buns, poke bowls, etc.)

Cuisine interest by generation



Gen Z

72% LATAM
69% Italian
51% Chinese



Millennials

75% LATAM
68% Italian
56% Chinese



Gen X

74% Italian
68% LATAM
65% Chinese

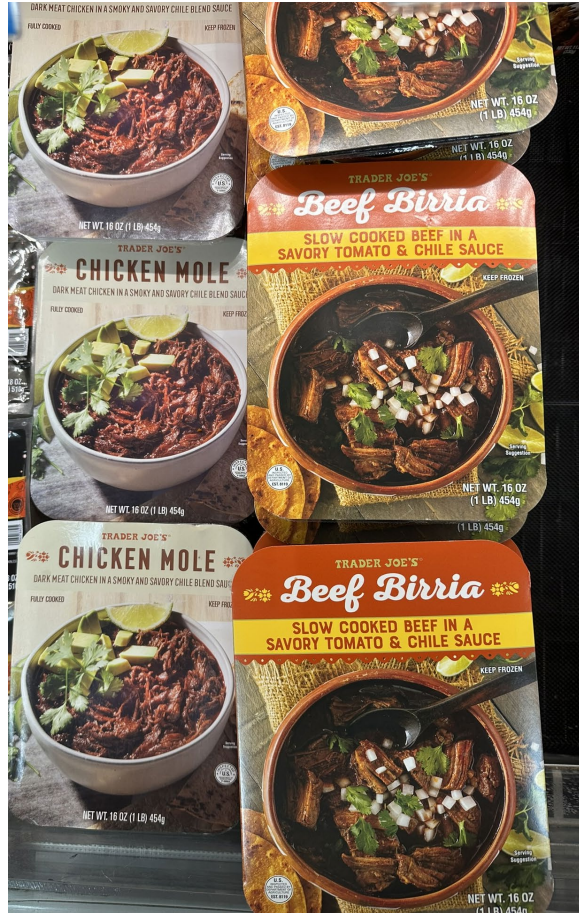


Boomers

78% Italian
74% Chinese
65% LATAM

Descriptions have become much more cuisine specific

Instead of Mediterranean, Caribbean or Latin American, it is Cuban, Gyros and Birria



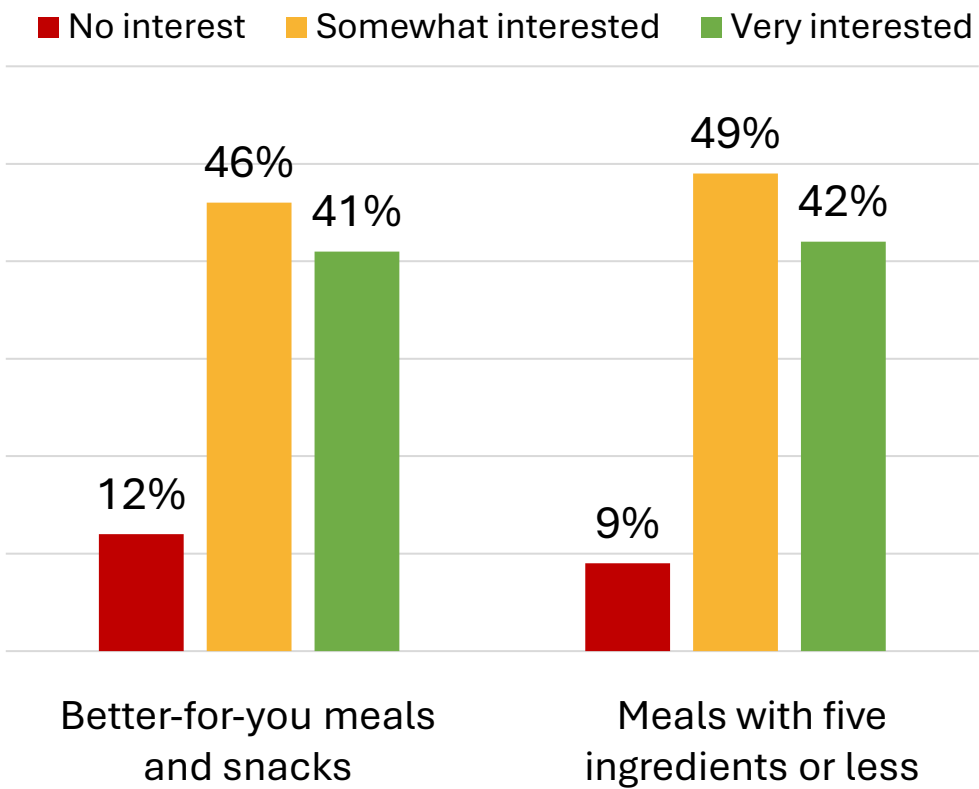
Bonjour to evenings with a French touch

Pictures: 210 Analytics

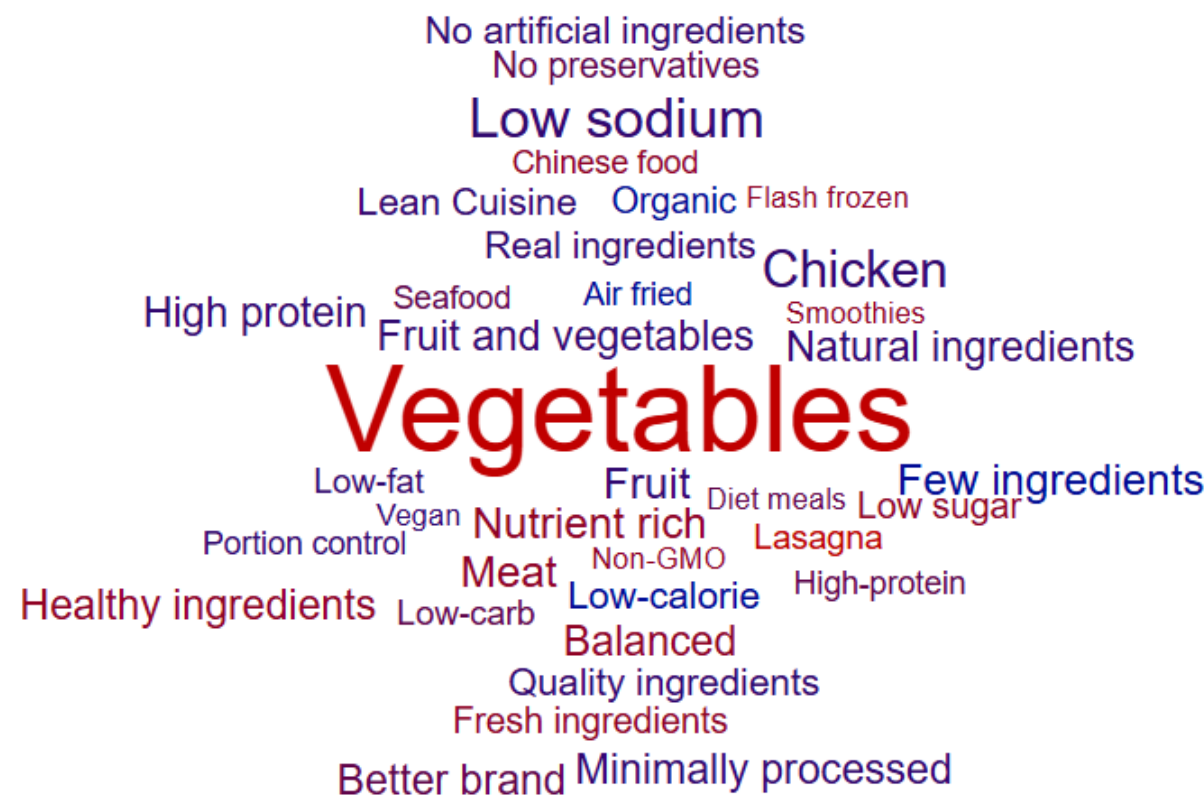
Health-focused frozen meals generate strong interest

Vegetables dominate as a better-for-you frozen food choice

Interest in frozen...



Description of a better-for-you frozen food option



Enable “purposeful choices”

Make “better for you” choices easy in-store and online



“Look for choices that meet your unique needs across food categories”



“Say hello to freshness and goodbye to the bad stuff”



Preparation is increasingly part of healthy choices

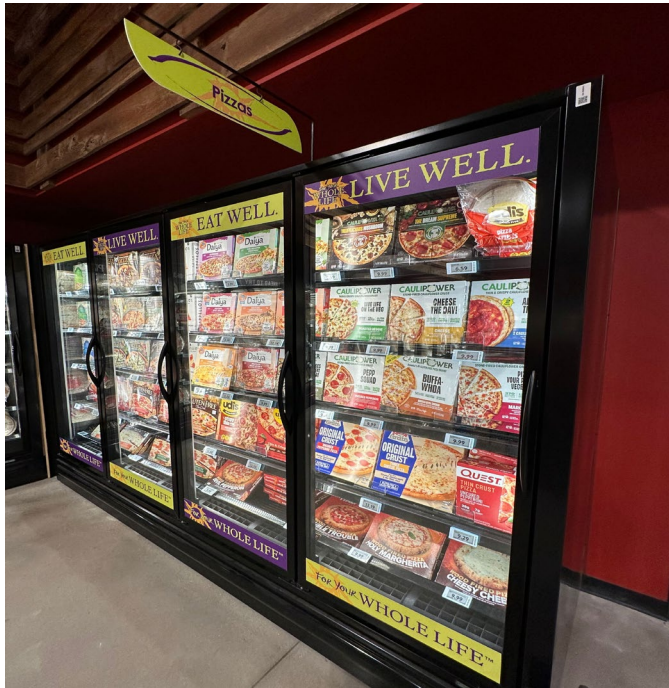
Pictures: 210 Analytics

“Real” ingredients are the top BFY indicator across segments

Gen Z and Millennials over index for high protein

96%

of consumers believe there are better-for-you options in the frozen food department



Better-for-you attributes from a list of options

47%	“Real” ingredients, such as real cheese, butter or fruit
40%	Minimally processed
39%	High or added protein
39%	No artificial ingredients, colors or sweeteners
37%	Low, less or no sodium
36%	Low, less or no sugar
36%	No additives
35%	Simple, short list of ingredients
33%	Preservative-free
31%	Not ultra-processed
29%	Low, less or no fat
29%	Organic
27%	Non-GMO ingredients
23%	A health rating, certification or healthy choice callout
21%	Added vitamins or other functional benefits
18%	Smaller portions
10%	Vegan/plant-based
9%	GLP-1 friendly

Conventional products generate >90% of sales

Antibiotic-related claims drove growth in processed meat/poultry

Conventional versus claims-based frozen food and beverage sales



Frozen food department	Share of dollars	Dollars vs. YA	Share of units	Units vs. YA
Conventional	90.4%	+1.6%	92.7%	+0.2%
Organic	5.7%	-0.6%	5.6%	+0.9%



Frozen fruits & vegetables	Share of dollars	Dollars vs. YA	Share of units	Units vs. YA
Conventional	90.1%	+2.6%	96.6%	+2.7%
Organic	9.9%	+2.0%	3.4%	+4.7%



Frozen processed meat	Share of dollars	Dollars vs. YA	Share of units	Units vs. YA
Conventional	67.5%	+11.0%	74.8%	+10.4%
Organic	2.0%	+3.1%	1.5%	+0.2%
Antibiotic-free/NAE	30.5%	+8.1%	23.7%	+2.1%

Source: Circana, Integrated Fresh, MULO+, 52 weeks ending 10/5/2025

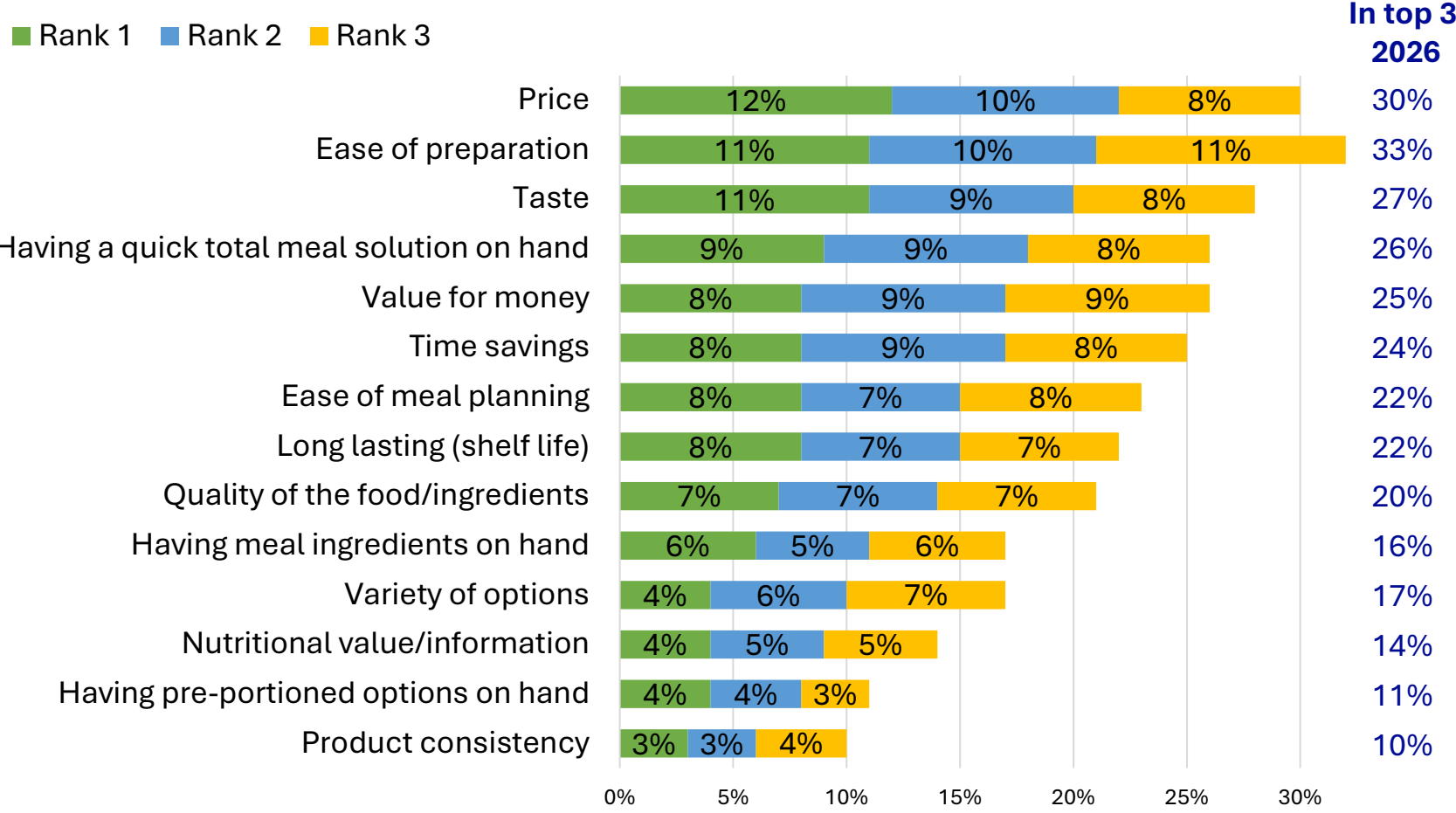
Frozen Food Purchase Decisions



Price and ease lead, but taste gains purchase influence

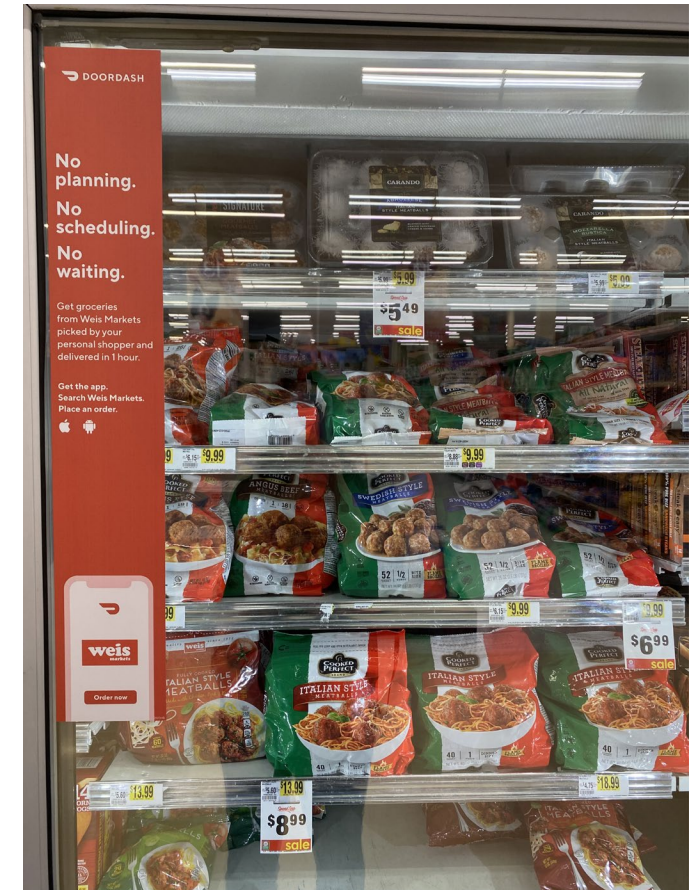
Variety, quality and nutrition are key core consumer attributes

Top 3 reasons for buying frozen food, whereby 1 is the top driver



Picture: 210 Analytics

Affordability relative to other departments in the store and delivery (one of the few growth areas in foodservice!)



Pictures: 210 Analytics

Core consumers think more highly of the quality

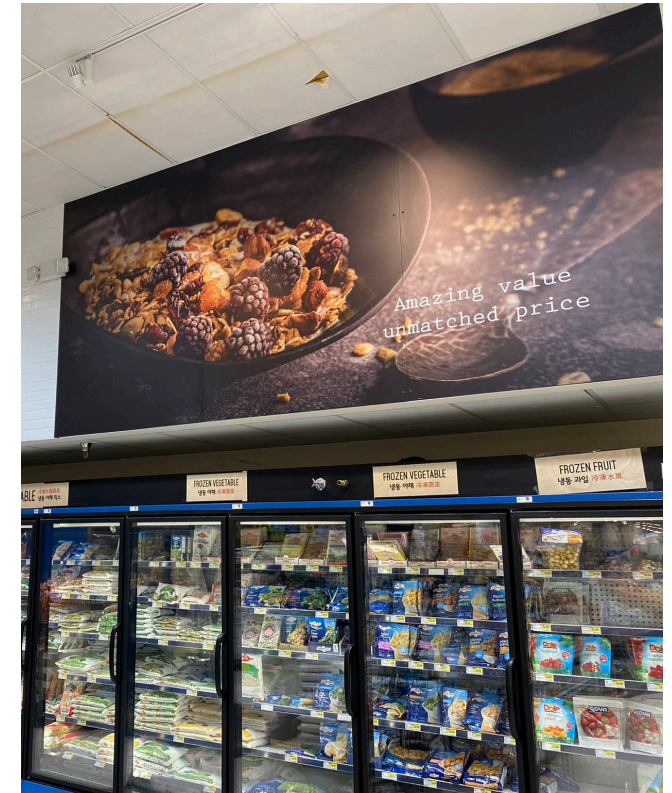
Focus on frozen advantages, taste and value versus price alone



Co-located with the produce department
“Freshness locked in”
“All taste, no waste”
“Ready when you are”



“Veg. Easy way to five a day.”



“Amazing value
Unmatched price”

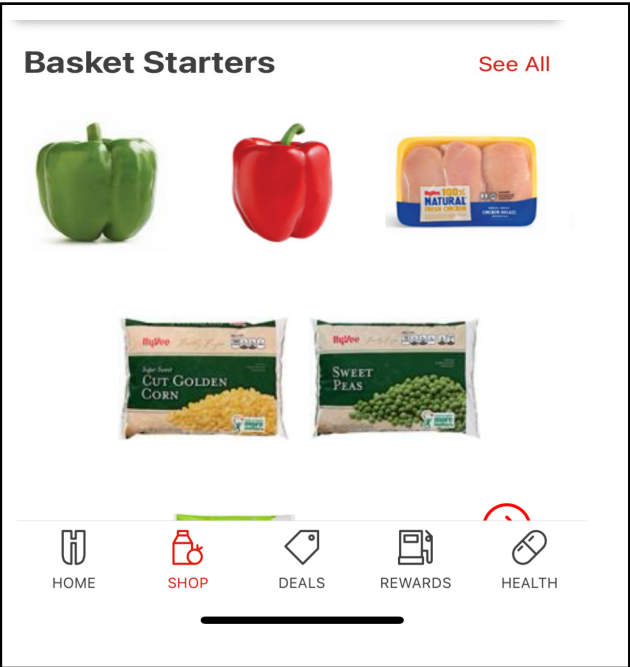
Pictures: 210 Analytics

Mass, club and online expand primary store shares

Traditional grocery continued to lose ground

16%

Of frozen food shoppers purchase the majority of their groceries in one channel, but frozen food in another



Primary grocery and frozen food channel	Primary grocery store	Primary frozen food store	Core consumers (frozen)
Supermarket/grocery store (Kroger, Safeway, Publix, etc.)	▼ 43%	39%	36%
Mass merchandisers (Walmart, Target, Fred Myer, Meijer, etc.)	▲ 31%	34%	36%
Club stores (Costco, Sam’s Club or BJ’s)	▲ 10%	13%	14%
Discount and dollar stores (ALDI, Save-a-Lot, Dollar General, etc.)	7%	6%	5%
Online (Amazon, ButcherBox, etc.)	▲ 4%	3%	5%
Specialty/organic stores (Whole Foods, Sprouts, etc.)	3%	3%	2%
Other	2%	2%	2%

▼▲ Change vs. 2023

Grocery e-commerce is a growth area

Frozen food conversion is high and growing, especially among core consumers

67%

Of consumers have purchased groceries online for delivery or pick up in the past six months

▲ from 54% in 2023

Frequency of buying groceries online

	2023	2026
Don't order online	37%	33%
Just tried once or twice	9%	9%
Less than once a month	9%	10%
Once a month	15%	16%
Every 3 weeks	6%	7%
Every 2 weeks	10%	12%
Weekly or more often	13%	13%

88%

Of online shoppers have ordered frozen food online in the past six months

▲ from 86% in 2023

▲ from 82% in 2020

Frozen food online order type

- ▲ 42% Home delivery
- ▼ 23% Pickup
- ▲ 23% Pickup and delivery

Compared to 2020 and 2023

Dollar distribution mirrors primary channel distribution

Channels frequented by Gen Z and Millennials are gaining share

Frozen food dollar distribution across channels

Channel shares	Frozen food department		Frozen fruits/vegetables	
	Dollar sales 2021	Dollar sales L-52 weeks	Dollar sales 2021	Dollar sales L-52 weeks
Traditional grocery	44.5%	▼ 39.8%	46.4%	▼ 39.8%
Mass/supercenter	24.7%	▲ 25.7%	23.3%	▲ 26.0%
Club	13.3%	▲ 13.7%	11.5%	▲ 12.5%
Discount grocery	7.1%	▼ 6.5%	9.0%	9.0%
Online	2.6%	▲ 5.0%	2.8%	▲ 5.3%
Health/natural stores	2.4%	2.3%	3.0%	2.8%
Specialty stores	0.6%	0.6%	0.6%	0.5%
All other	4.8%	6.3%	3.4%	4.2%

Source: Circana, Integrated Fresh, Total US, All Outlets, 52 weeks ending 9/28/2025

Price comparisons are integral to frozen food purchases

Core consumers are the most likely to make brand comparisons

Comparison behaviors when shopping for frozen food

Compare...	All	Low income	High income
Sale prices (to other sale or regular prices)	54%	59%	49%
The price across different brands/store brand	38%	38%	39%
The total package price across similar items	31%	28%	36%
Nutrition facts panel of similar items	31%	19%	40%
Prices at different stores	29%	27%	28%
Ingredient lists of similar items	29%	20%	38%
The price per ounce across similar items	28%	24%	34%

■ Significantly over indexes
■ Significantly under indexes



BOGOs are America’s most loved discount type

As a stock-up trip item, interest for one-day promotions is low

Discount type preference when purchasing frozen food

Type	Not my thing	Could be ok	Like it a lot
BOGOs (Buy one, get one)	5%	33%	62%
Mix and match discounts (such as 3 items for \$15)	11%	43%	46%
“Truckload/Fill the freezer event” (large quantities at low prices)	24%	40%	36%
One-day promotions (better discount than the weeklong ones)	17%	56%	27%

Pictures: 210 Analytics



Promotions have a big hand in driving impulse

Line extensions are also a powerful way to prompt unplanned purchases

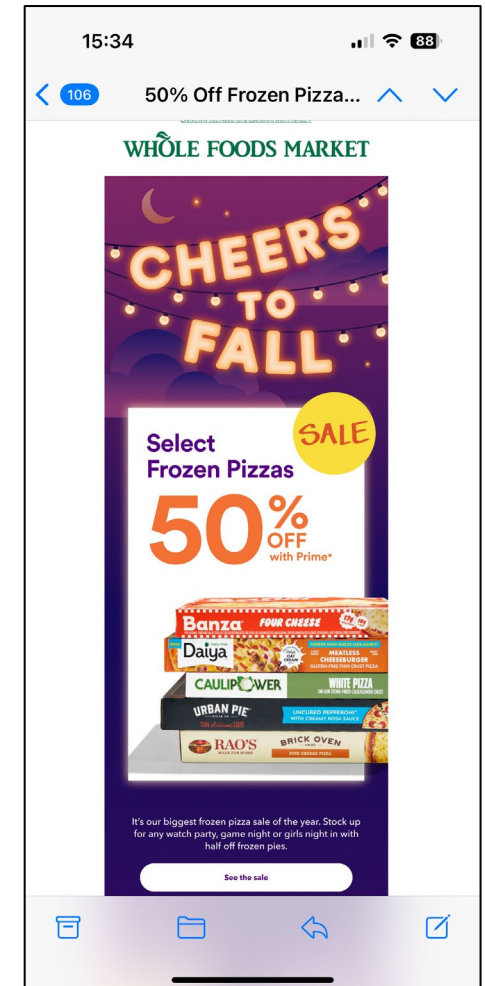
96%

Of shoppers can be persuaded to make unplanned frozen food purchases



Prompts to generate unplanned frozen food purchases

- 58%** Good price/promotion
- 37%** A new item from a familiar brand
- 28%** Recommendation
- 25%** Being bored with the same old
- 24%** Recipe/serving ideas
- 23%** Attractive packaging
- 23%** Sampling/cooking demonstration
- 21%** “New” called out on the package or shelf
- 17%** Prominent location at the end of an aisle or separate display
- 16%** TikTok, YouTube or other social media trend/alert
- 16%** On-pack callouts/claims (high protein, low fat)
- 4%** None of these



Frozen Food Perceptions



Confusion persists around preservatives and additives

Only one-third of consumers fully understands the ins and outs of frozen foods

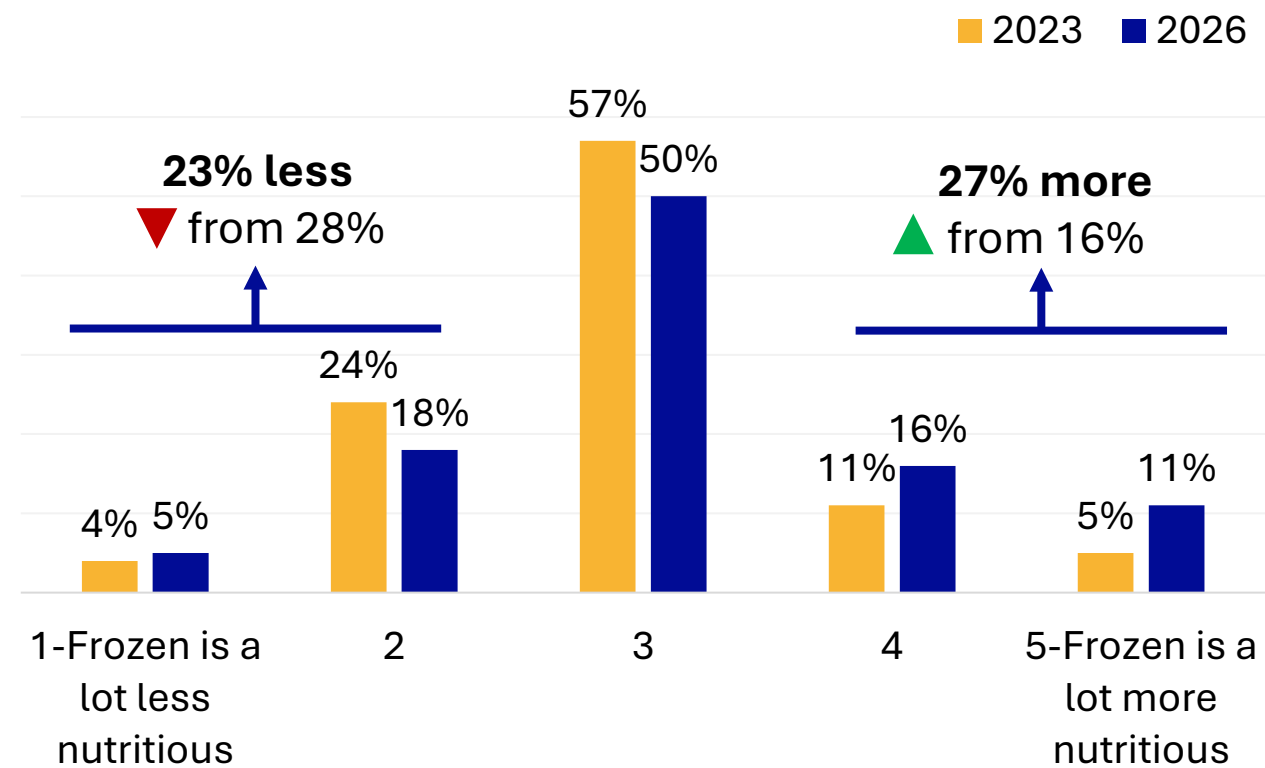
True or false, based on your current knowledge				
	Definitely false	Not sure, but I think false	Not sure, but I think true	Definitely true
Frozen food does not require preservatives with modern freezing technologies	8%	24%	42%	25%
Frozen proteins (meat, poultry, seafood) are as nutritious as fresh ones	6%	18%	42%	35%
Freezing locks in food's vitamins and minerals for months	4%	19%	45%	31%
Unseasoned frozen fruits and vegetables contain additives to aid the manufacturer's freezing process	7%	32%	39%	22%



Nutrition perceptions are improving

Further narrowing the knowledge gap could boost health as a purchase driver

Nutrition perceptions of frozen food, illustrated by perceptions of frozen versus fresh berries



“It’s instantly frozen so it actually keeps all the nutrients better than fresh that loses nutrients.”

“Frozen is safer because bacteria can’t grow.”

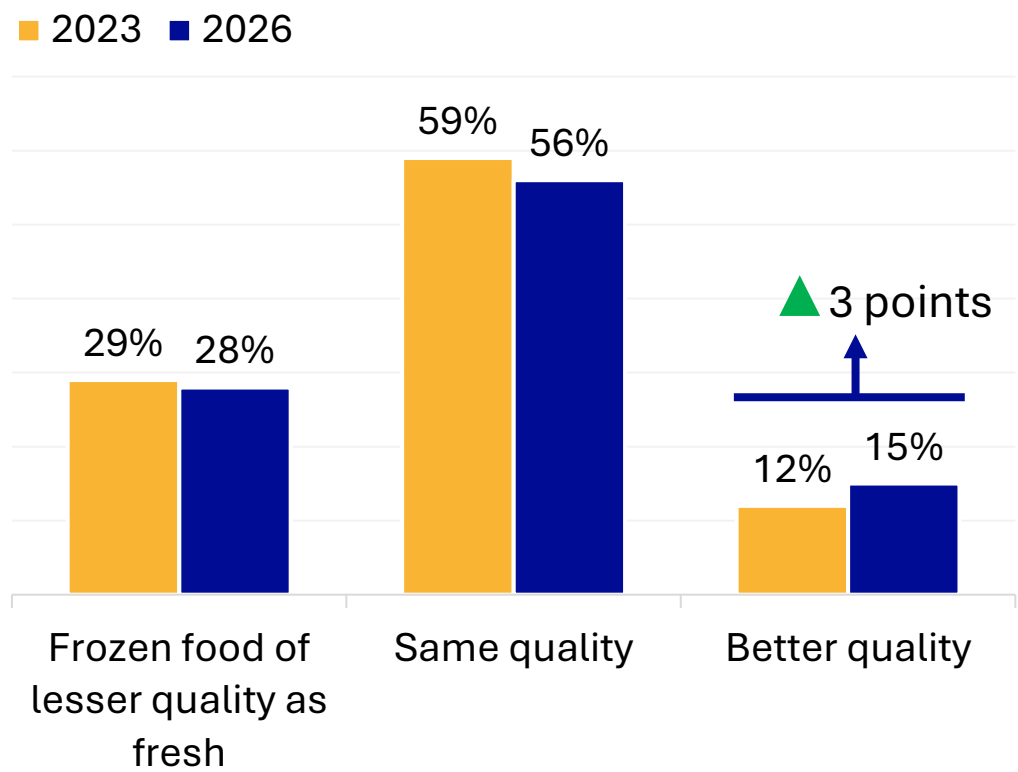
“Fruit and vegetables are fine, I think, but some of the meals still have a lot of sodium and other stuff in them.”

Positive by generation and segment:	
32% Gen Z	21% Light consumers
27% Millennials	23% Average consumers
27% Gen X	34% Core consumers
13% Boomers	

Slight bump in quality perceptions of frozen food

Far better perceptions among younger and core consumers

Quality perceptions of frozen food



“I think nutrients die when you freeze things, but better than not having any vegetables.”

“A lot of frozen stuff is full of sodium, additives and negatives.”

“All the bad stuff goes to canned goods. Because it’s flash frozen, it’s actually really good.”

Better quality by generation and segment:

19% Gen Z	11% Light consumers
22% Millennials	13% Average consumers
14% Gen X	19% Core consumers
6% Boomers	

Stronger awareness of frozen and food safety

Still, many are not aware, or not quite sure, about safety measures

True or false, based on your current knowledge



Definitely
false



Not sure, but
I think false



Not sure, but
I think true



Definitely
true

Freezing is one of the safest ways to preserve food	3%	7%	37%	53%
Frozen foods can be safely cooked from frozen state (without thawing first)	6%	16%	38%	40%
Freezing does not impact the quality of food	10%	23%	39%	28%
Thawed frozen foods can be refrozen safely unless they have set out for multiple hours	18%	24%	33%	24%



Explanations and education can be powerful

Especially during highly-publicized recalls



Shrimp promise

- All natural
- No preservatives
- No additives
- No phosphates
- No antibiotics
- Sustainably sourced

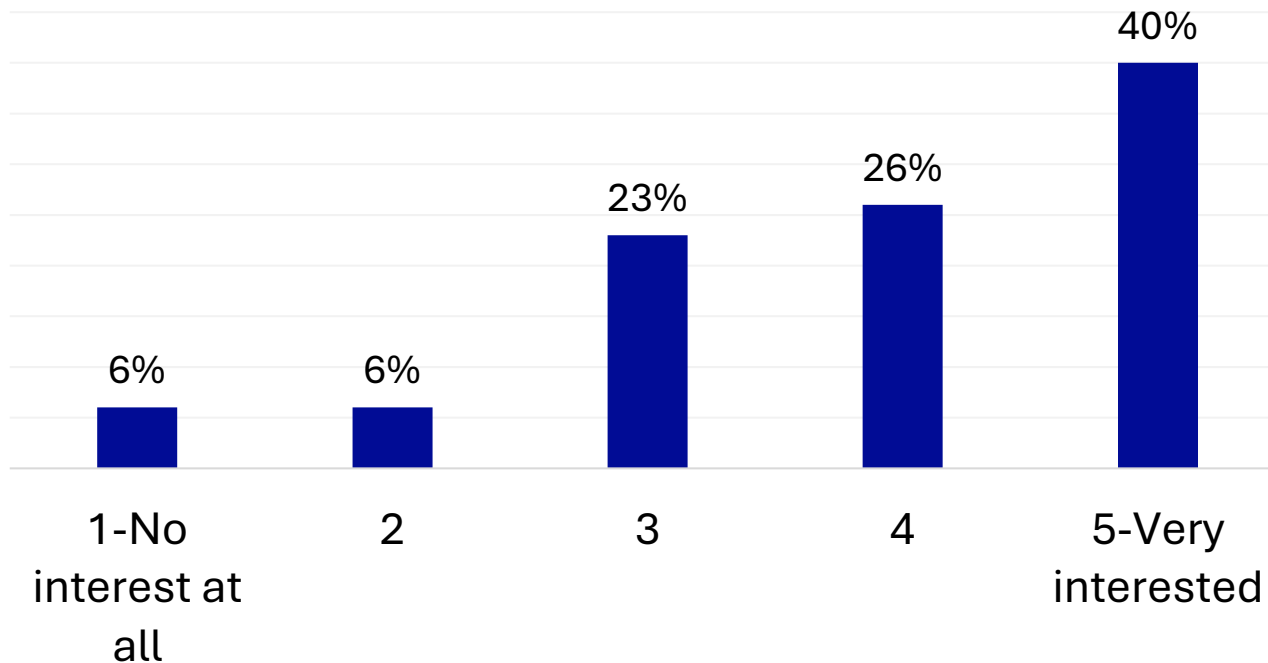
Frozen Food Merchandising



Holiday frozen food sets spark shopper interest

Three-quarters of core consumers like the idea

Interest in your store grouping all seasonal classics for holidays such as Thanksgiving in a frozen food aisle endcap

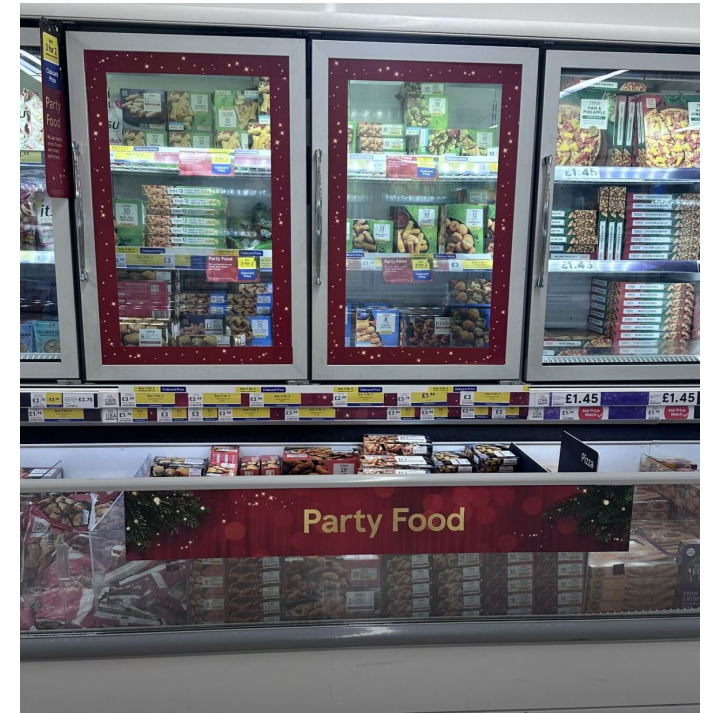


Thanksgiving endcap example with frozen green beans, cranberries, pumpkin pie, whipped cream, rolls, turkey, etc.

Rendering by HillPhoenix

Holiday merchandising and curation

Can help spark new item trial and expanded purchases



Pictures: 210 Analytics

Themed sets can help drive engagement

Dwelling = selling



Pictures: 210 Analytics



Better-for frozen food items attract broader shopper base

Interest among light consumers has risen substantially since 2023

77%

Look for one or more better-for attributes when purchasing frozen foods

▲ from 74% in 2023

74% Light shoppers ▲ from 69%

80% Core shoppers ▲ from 77%



Better-for areas of interest

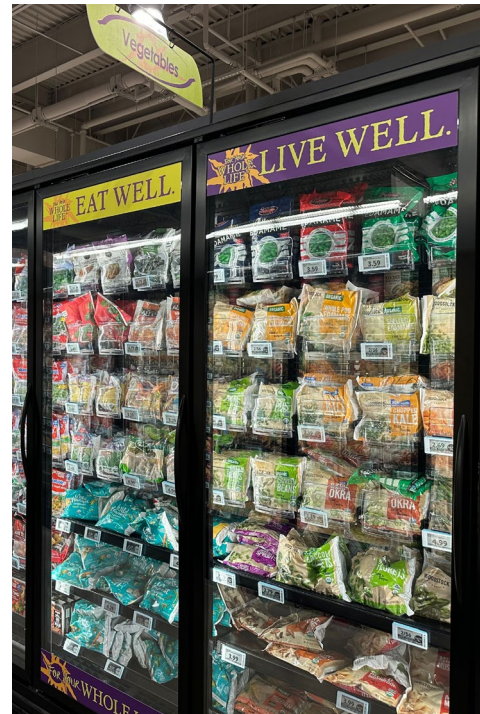
2026

2023

55%	Better for me/my family (better choice nutritionally)	51%
27%	Better for the planet (minimizing environmental impact in production, packaging, food waste, etc.)	28%
27%	Better for the animal (humanely raised meat/poultry, sustainable seafood, etc.)	26%
25%	Better for the worker/associate (working conditions, fair wage, etc.)	25%

Signage can alert shoppers of “better for”

Health cues, sustainability explanations or caring for the community

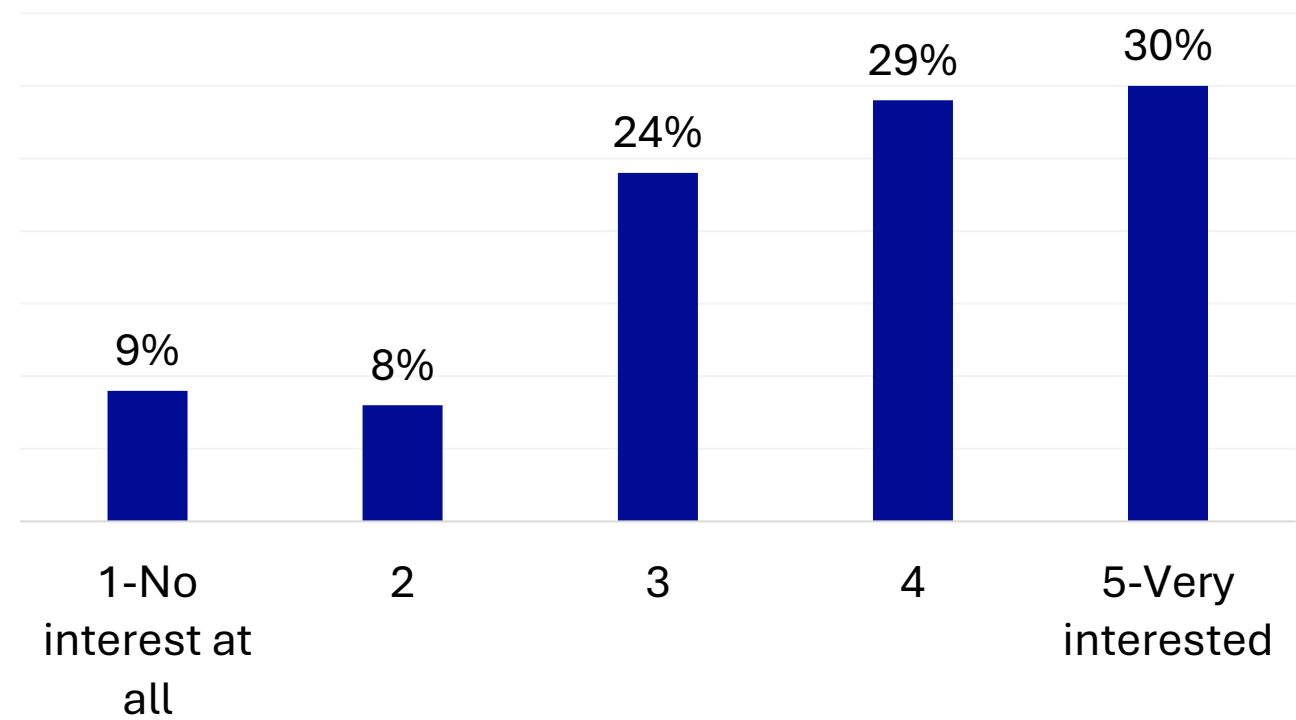


Pictures: 210 Analytics

Merchandising by lifestyle or health goal has potential

Far greater interest among core frozen food consumers

Interest in special sections in the frozen food aisle that group items by lifestyle or health goal



Example of a lifestyle or health goal endcap, such as high protein or low-carb.

Rendering by Hillphoenix

Protein leads lifestyle set interest

Supporting convenient, goal-based exploration in-store and online

[if neutral or interested] Types of lifestyles or health goals that should have its own section in the frozen food aisle

- 52% High protein
- 35% All natural, avoiding artificial additives/colors/flavors
- 32% High fiber
- 31% Organic
- 25% Gut health
- 25% Healthful aging
- 24% Low/no-carb
- 22% Immune system support
- 19% Gluten-free
- 18% Cognitive/brain health
- 15% Vegan/plant-based
- 12% GLP-1 friendly



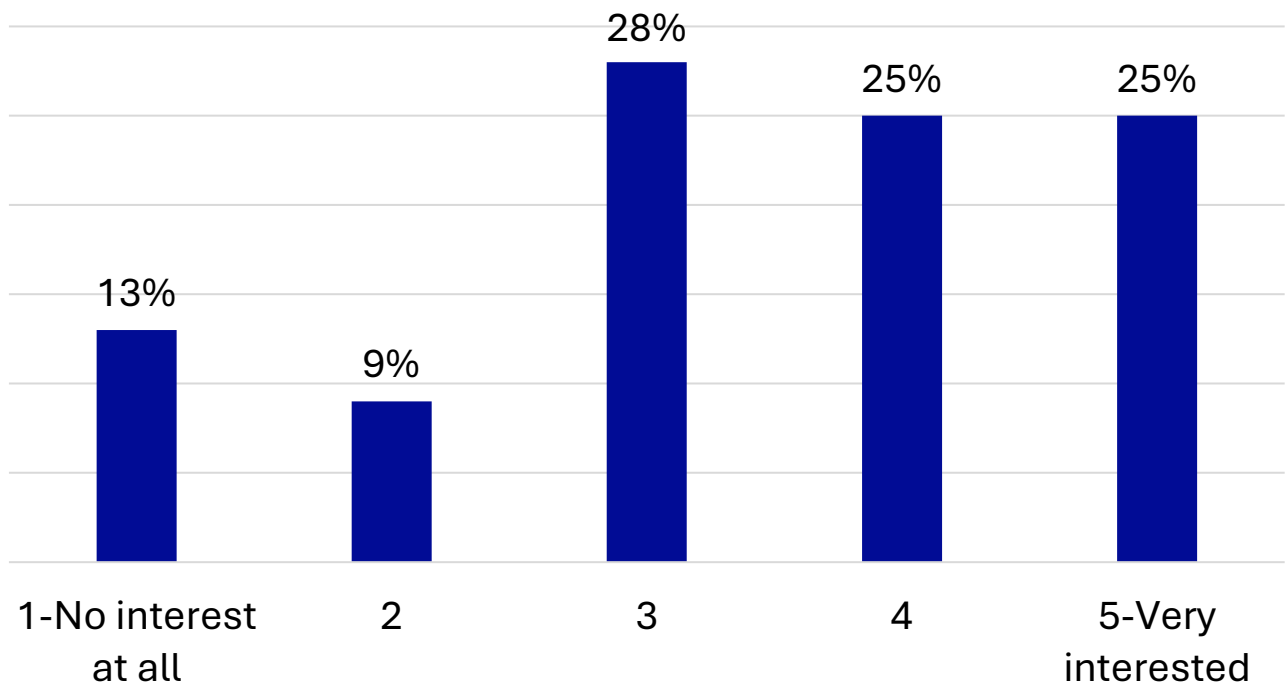
Influence of Make America Healthy Again (MAHA) on your interest in natural (no artificial) ingredients

- 32% MAHA has no influence on my interest whatsoever
- 30% MAHA raised the issue and I did my own research after
- 19% MAHA is 100% the reason behind my interest
- 20% What even is MAHA?

Integrated fresh and frozen sets resonate with shoppers

Dual temp cross-merchandising can help drive additional trips and units/trip

Interest in having frozen food offerings in other areas of the store

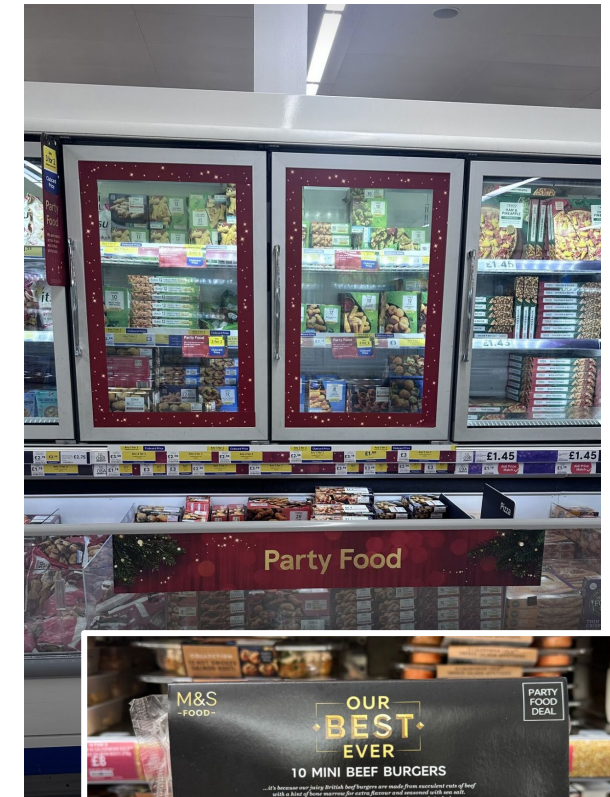


Example of an integrated refrigerated fruit and frozen item set, with frozen waffles, cheesecake, pancakes and whipped cream next to a fresh cut fruit.

Rendering by Hillphoenix

Best-in-class example: Tesco's party food campaign

“Mix and match across chilled and frozen party food”

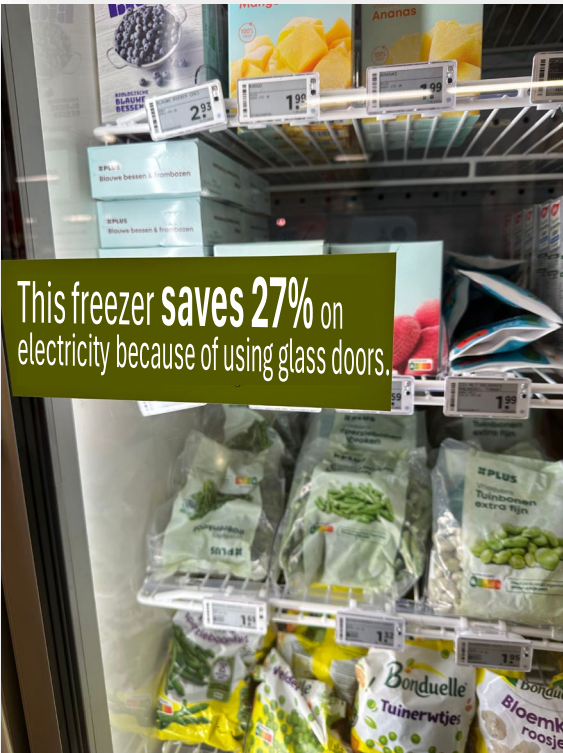
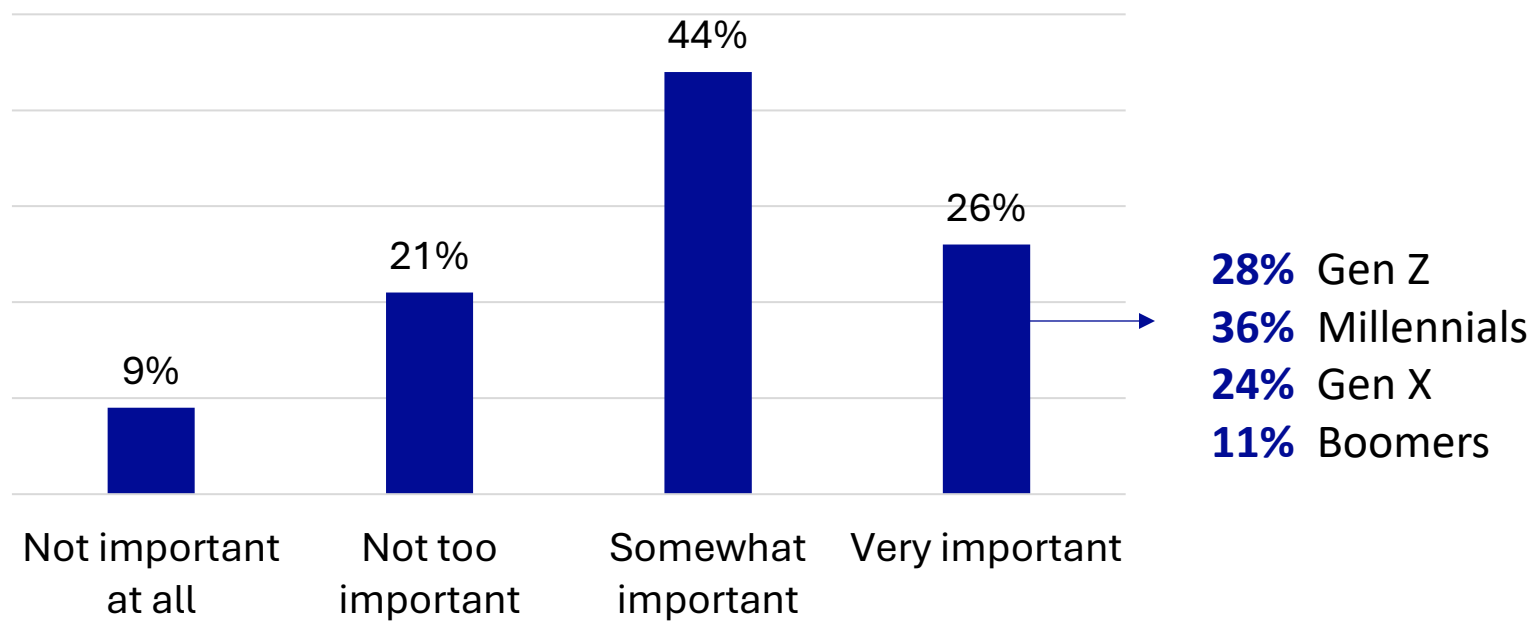


Pictures: 210 Analytics

Shoppers value energy-efficient freezers

Opportunity to communicate about sustainability efforts

Importance of your store having freezers with a reduced/minimal carbon footprint or energy usage



Example used (including picture):
This freezer saves 27% on electricity because of using glass doors.

Pictures: 210 Analytics

Resealable packaging is a hit with many consumers

Smaller households, in particular, like the idea of pack size variety

Importance of packaging-related innovations

	Not important	Somewhat important	Very important
Have re-sealable (open/close) packaging	7%	40%	53%
Have different pack size/amount options	11%	49%	40%
Have recyclable, reusable or compostable packaging	17%	46%	37%
Have pre-portioned/individual portions for multi-pack price	17%	50%	34%
Have recipes and meal ideas on the package	23%	48%	30%



Earn some extra credit by communicating improvements

Whether packaging or equipment



Pictures: 210 Analytics



Together to a better planet. Choose first, then open the door

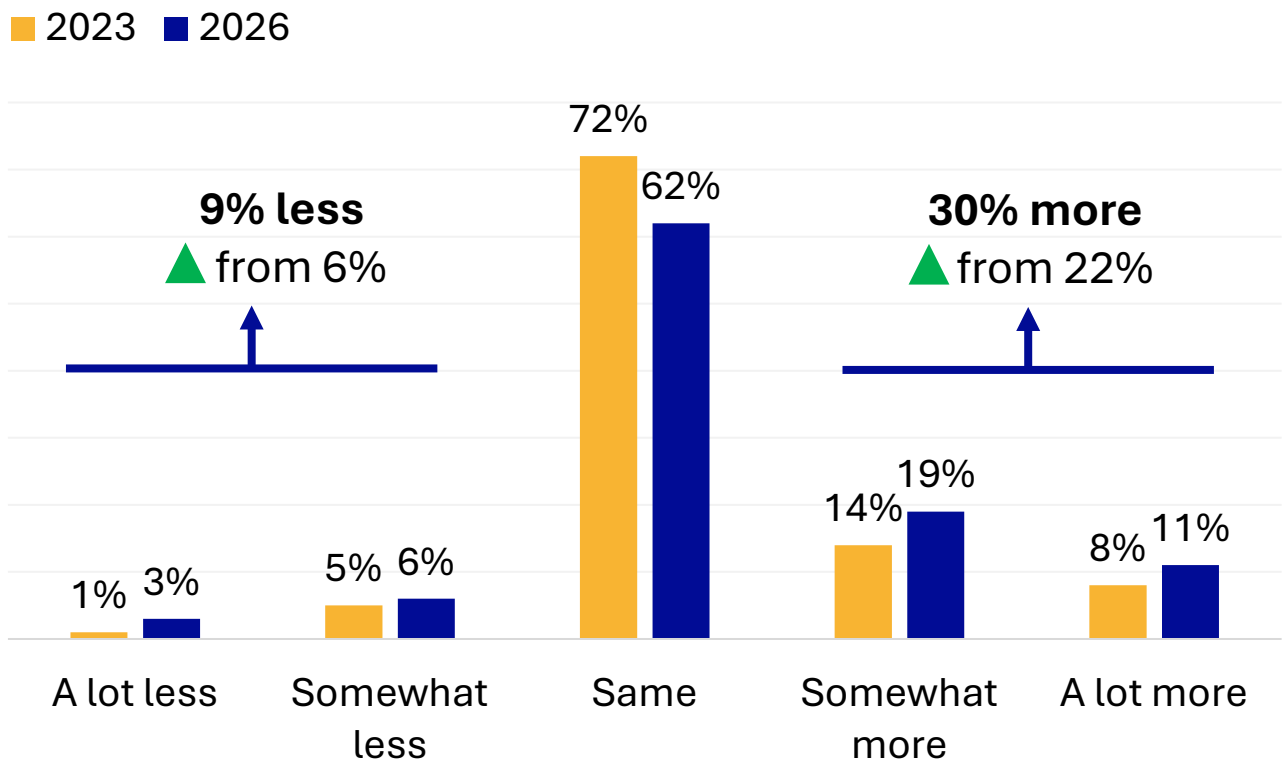
Key Takeaways



Less stability, more shifting in frozen foods' future

Core and average consumers most likely to anticipate increased purchases

Frozen food purchase forecast for the next few months



Purchase more by generation and segment:

- | | |
|-----------------|-----------------------|
| 42% Gen Z | 20% Light consumers |
| 38% Millennials | 26% Average consumers |
| 29% Gen X | 36% Core consumers |
| 14% Boomers | |

“I’m a frozen fruit convert.”

“Air fryer is replacing fast food takeout.”

“Money is very tight and I have to cut back on everything.”

Key pathways to drive frozen food growth

Engaging consumers in five main areas

Frozen food engagement strategies

Following the core consumer blueprint	Leverage the core consumer blueprint for more cross-category engagement and enhanced frozen food perceptions to grow sales among light and average consumers.
Emphasizing frozen foods' virtues	During challenging financial times, lean into frozen foods' go-to role for good value for money, lack of food waste and having restaurant-quality equivalents with at-home convenience and cost.
Enhancing perceptions and resolve myths	Invest in building a favorable consumer perception of frozen food freshness, safety and nutrition along with environmental sustainability and food/package waste. These areas are especially important to younger generations.
Promoting frozen food nutrition and health attributes and benefits	Educate about the many healthy solutions in frozen food ingredients and meals. Provide the nutrients along with the health benefit on pack, on the shelf and online. Leveraging QR codes can help with limited on-pack space.
Optimizing frozen food's role in meal ideation and occasions	Provide recipes and ideation to explore a wider variety of meal occasions, especially snacking and lunch. Leverage frozen foods' superior versatility across many different meal applications.

Questions?

For questions or additional info:

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thank you!