

Frozen Trend Spotlights

*In the last 5 years, the Frozen Department had a **CAGR of 8.1%**, reaching **over \$77 Billion!****

*Total US xAOC+ Conv

Globally Flavored Frozen Items grew

+4.1%

\$ % Chg vs YA

Frozen Better For™ \$ Velocity grew

+3.2%

vs YA, selling faster than Non Better For™ (-1.6%)

Compostable Frozen Items saw

+25.8%

EQ growth vs YA

Global Flavors are Growing within Frozen

Developed & Emerging Global Frozen Flavors

(\$ Chg YA, \$ % Chg YA)

Chinese (+6.8M, +48.3%)

Hot Honey (+3.6M, +64.9%)

Teriyaki (+2.7M, +1.8%)

Curry (+2.6M, +8.6%)

Sweet & Sour (+1.4M, +0.8%)

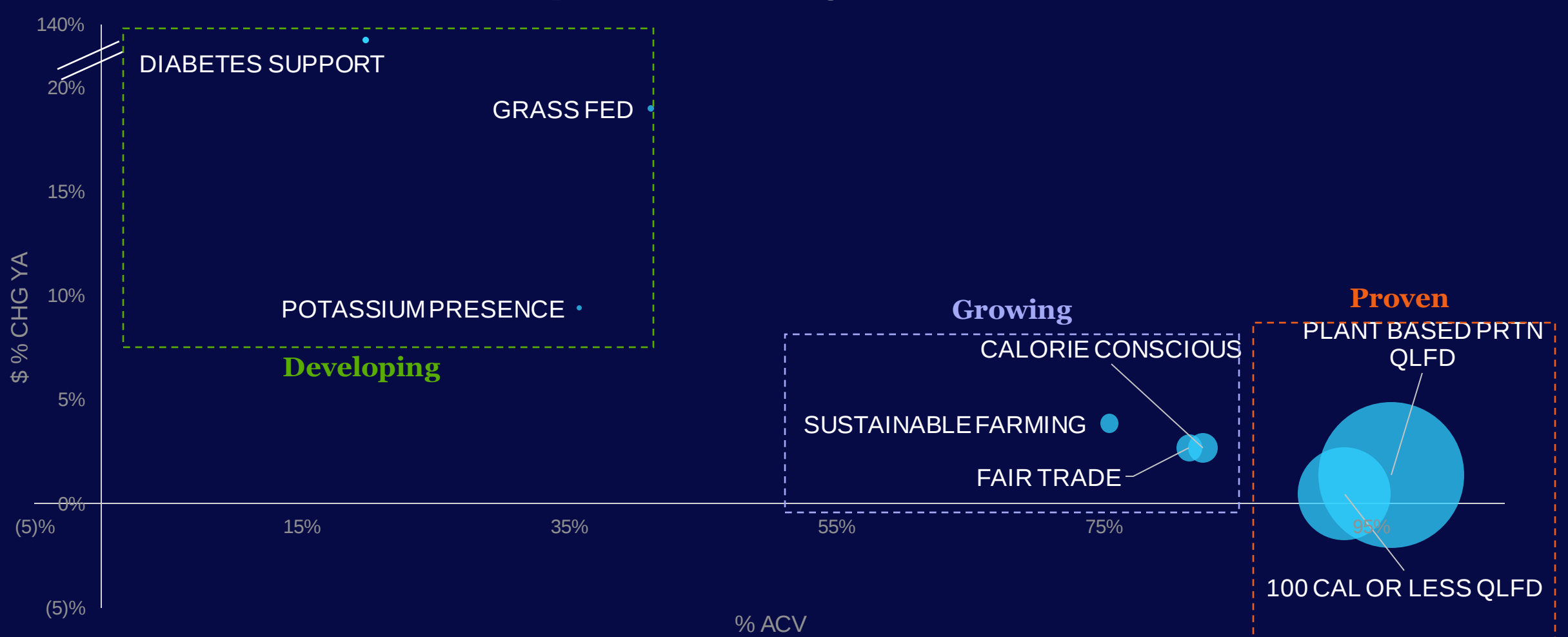
Miso (+1.3M, +35.0%)

Hot (+840K, +1.6%)

Japanese (+180K, +95.7%)

Source: NielsenIQ Discover Total US xAOC + Conv

Win with up & coming Frozen trends



Source: NielsenIQ Discover fueled by Product Insight; Size of bubble: \$ L52W

Key Takeaways



- Tracking attributes (such as Global Flavors, Better For, and Compostable items) is the first step in gaining a fundamental understanding of trends within Frozen. From there, develop your consumer understanding to identify white spaces. Finally, activate through innovation and targeting, leveraging product attributes to attract and expand audiences.
- Diabetes Support, Grass Fed, and Potassium Presence are developing claims within Frozen. Know whether your products qualify as certain claims and ensure this is reflected on product packaging and in marketing efforts.

Reach out to your NIQ representative to learn how NPI Characteristics can help you understand emerging trends and attributes in the Frozen department and beyond.



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