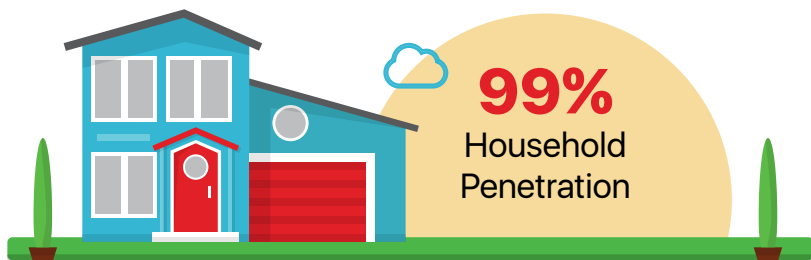


While the frozen food landscape is changing, there *are* ways to win.

Data sourced from Acosta's custom shopper survey August 2017 and Nielsen Answers 52 weeks Panel and Syndicated Data ending July 15 and Sept. 9, 2017.

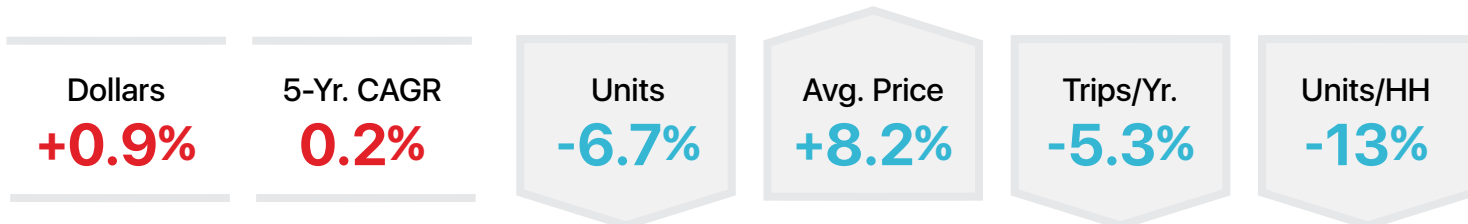
## NEARLY EVERYONE BUYS FROZEN FOODS

## AND BILLIONS ARE SPENT ANNUALLY

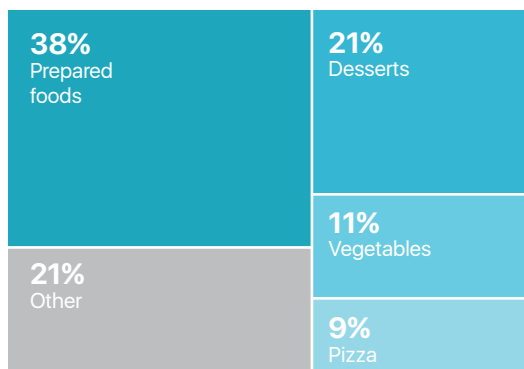


**\$49 BILLION**  
by 122 Million Households

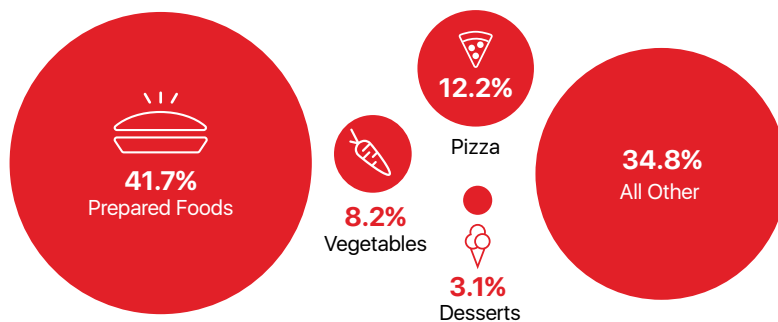
SINCE 2013, DOLLARS HAVE BEEN FLAT AND UNITS IN DECLINE DUE TO FEWER TRIPS AND PURCHASES, AND HIGHER AVERAGE PRICING



ONLY FOUR CATEGORIES MAKE UP 80% OF UNITS SOLD, AND NONE HAVE BEEN IMMUNE TO DECLINE



% of Unit Decline (2017 vs 2013)



## SHOPPER ATTITUDES TOWARD FROZEN FOODS HAVE SHIFTED

Fresh foods are stiff competition



**68%**  
of shoppers feel  
**FRESH**  
is healthier

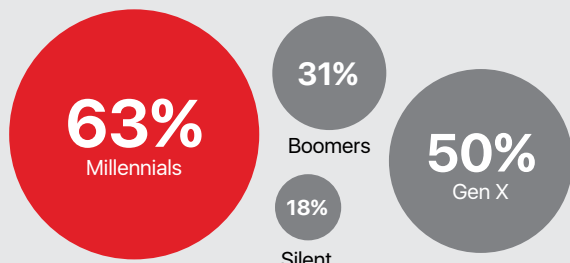
Some only buy specific categories because they believe them to be healthier

**48%** GEN X  
**48%** BOOMERS  
**40%** SILENT



**54%**  
MILLENNIALS

Many buy natural/organic because they feel it's better for them

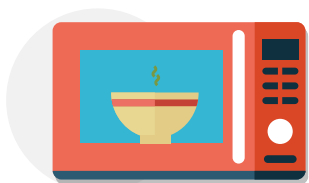


Even with all these changes, some are buying frozen more frequently

% Shopping More Frequently vs. Year Ago



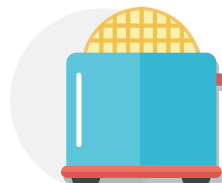
### WHAT DO MILLENNIALS VALUE IN FROZEN FOODS?



**89%**  
quick dinner solution



**72%**  
convenient lunch



**81%**  
convenient breakfast for kids



**78%**  
side dishes

### OPPORTUNITIES DRIVEN BY MEGA TRENDS HEALTH & WELLNESS, CONVENIENCE, INDULGENCE, AND VARIETY EXIST

Breakfast  
**+2.0%**



- burritos
- frittatas
- bowls

Side Dishes  
**+8.0%**



alternative grains

Complete Meals  
**-1.6%**



- vegetarian
- better ingredients
- more flavor options

Ice Cream  
**+8.0%**



"healthy" ice cream

Cauliflower  
**+59.3%**



mainstream items in veggie form: rice, tots

### WAYS TO WIN

#### BE A SOLUTION

Shoppers living fast-paced lives with limited time want quick & easy options.

#### BE INNOVATIVE

Shoppers crave variety; offer restaurant-inspired original flavors

#### STAND FOR SOMETHING

Make your stance known whether it's no GMO, no high fructose corn syrup, trans fat-free, etc.

#### HEALTH & WELLNESS IS KEY

Steer toward 'real' ingredients, reformulate recipes, and offer healthy indulgences.

**ACOSTA**

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