

# The Future of Frozen Food 2025





# The Future of Frozen Food 2025

Conagra Brands, a leading maker of frozen foods including brands such as Birds Eye®, Healthy Choice®, Marie Callender's®, Banquet®, P.F. Chang's Home Menu®, Gardein® and more, proudly shares the second edition of the Future of Frozen Food report. This report is not based on traditional consumer surveys, and instead leverages Conagra's cutting edge demand science and insights expertise. In addition, we partnered with Circana, LLC to provide robust sales data and in-home consumption behaviors from its National Eating Trends® report. The latest social media trends are also layered in throughout from Tastewise, as are Google Search trends from Similarweb. This report provides a comprehensive, data-driven look at the future of the \$91.3 billion U.S. frozen food industry, as defined by Circana, LLC.<sup>1</sup>

U.S. consumers are choosing from a diversified array of frozen food options, and they are consuming them in new ways. This report evaluates new trends emerging in the U.S. frozen food landscape, while reexamining trends from the [2024 Future of Frozen Food Report](#), which have seen continued growth.

To adjust for price or product size variation during the past four years, this report examines volume metrics to track purchase growth.

# TABLE OF CONTENTS

<b>Frozen Food Facts</b>	<b>4</b>
<b>Report Overview</b>	<b>6</b>
<b>Future of Frozen Food 2025 Trends</b>	<b>8</b>
Modern Health	<b>9</b>
Elevated In-Home Experiences	<b>12</b>
Global Cuisine	<b>16</b>
Bites & Minis	<b>20</b>
Spice & Heat	<b>24</b>

# FROZEN FOOD FACTS



The U.S. frozen food market is the **largest in the world**, making up 39% of the global market<sup>1</sup>



**Birds Eye, Marie Callender's, and Banquet** make up three of the five most purchased brands in the frozen department<sup>2</sup>



**28%** of grocery store trips include at least one frozen food item<sup>3</sup>

Angie's BOOMCHICKAPOP® will soon enter the frozen novelties aisle with new Strawberry Almond & Cream bars to meet this high demand for frozen sweet treats



**Ice cream** and **frozen novelties** are both the most purchased frozen categories and most repeatedly purchased<sup>4</sup>



Ownership of air fryers, a convenient prep tool for frozen food, continues to grow with **newer dual basket-style air fryers** growing +22% versus last year<sup>5</sup>



Nearly half of American households have a **secondary freezer** beyond their primary refrigerator/freezer<sup>5</sup>

1. Euromonitor International, 2024  
2. Circana, LLC, Scan Panel, US, Total Frozen Food by Brand, Percent of Households Buying, 52 Weeks Ending November 3, 2024  
3. Circana, LLC, Scan Panel, US, Total Frozen Food, Percent of Frozen Grocery Trips by Lifestyle/Generation, 52 Weeks Ending November 3, 2024  
4. Circana, LLC, Scan Panel, US, Household Penetration and Repeat Buy Rate by Subcategory, 52 Weeks Ending November 3, 2024  
5. Circana, LLC, National Eating Trends®, Future of Frozen Initial Exploration – November 2024, Home/Retail, Appliance Ownership & Usage Survey, 12ME Sep '23 v. 12ME Sep '24

# FROZEN FOOD THROUGH A GENERATIONAL LENS

## Generational Preferences:

Different generations have different preferences when it comes to where they purchase frozen food.<sup>1</sup>

### GEN Z

Ages 12-27

More likely to shop for frozen at dollar stores and mass merchandisers

### GEN X AND BOOMERS

Ages 44-78

Both generations shop equally across channels for frozen foods. Gen X shops slightly more at club stores, while Boomers shop slightly more at traditional grocery stores

### MILLENNIALS

Ages 28-43

More likely to shop for frozen at convenience stores and mass merchandisers

### SILENT GENERATION\*

Ages 79-99

Significantly more likely to shop for frozen foods at drug stores and traditional grocery stores



# REPORT OVERVIEW

In this year's Future of Frozen Food report, we are exploring trends through a generational lens, **with a particular focus on younger consumers in the Millennial and Gen Z ranges.** These generations are shaping the future of frozen food with their evolving needs and preferences. As consumers enter the family formation stage, convenience and affordability become the priority, **driving a 54% increase in spending on frozen foods** during this period.<sup>1</sup> Frozen foods are used not only as complete meals but also as meal starters such as pre-chopped vegetables.



**Younger generations are also more adventurous eaters, embracing global cuisines and bold flavor combinations,** a trend influenced by the growing diversity of the U.S. population, with significant growth projected among Hispanic, Asian, and multiracial groups by 2050. By then, the non-Hispanic White population is expected to become a minority, representing 48% of the U.S. population.<sup>2</sup>



**BURRITO BOWLS HAVE GROWN 31%+ IN THE LAST FOUR YEARS ON MENUS<sup>3</sup>**

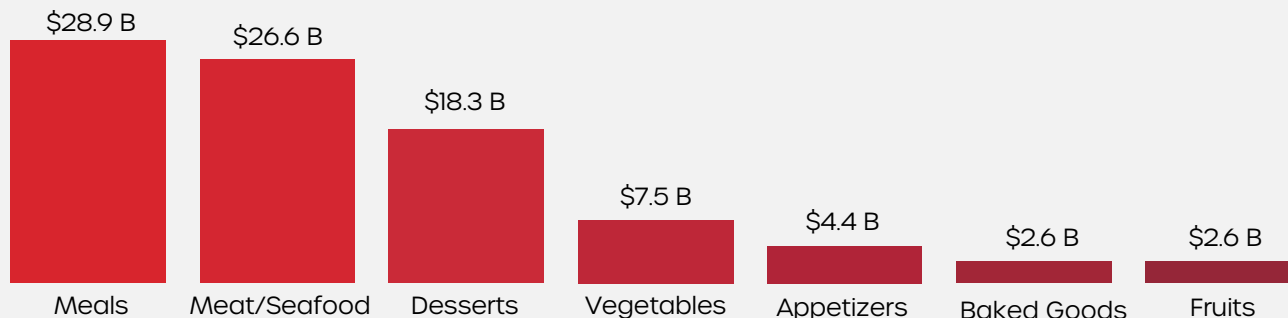
Additionally, their approach to health and wellness is unique, prioritizing **sustainable, natural ingredients, and holistic wellness** while occasionally opting for plant-based foods for both health and ethical reasons.

1. Circana, LLC, Total US - MULO+ Conv, Frozen Department Products, Household by LifeStage, Dollar Sales, 52 Weeks Ending November 3, 2024  
2. United States Census Bureau, projections based on 2020 Census  
3. Datassential, Menu Trends, September 2024

# WHY CHOOSE FROZEN?

Frozen foods have grown into a **\$91.3 billion<sup>1</sup>** industry, offering a diverse range of options that fit into any part of the day and cater to a variety of tastes and needs. **Leading the way is the frozen meals section, which accounts for 32% of total frozen sales.<sup>1</sup>** This includes everything from single-serve and multi-serve meals to pizzas, handhelds, and breakfast favorites. Based on data reported by Yogi Consumer Insights Platform, consumers value frozen meals for their convenience and time-saving benefits. They find frozen meals and vegetables ideal for busy schedules and a convenient alternative to cooking from scratch, allowing them to enjoy satisfying meals without extensive preparation.

## Frozen Food Categories<sup>1</sup>



The versatility of frozen products, especially vegetables, is also positively noted, as they can be used in various dishes like soups, salads, wraps, tacos, stir-fries, and as side dishes. Many product reviewers mention pairing frozen meals with a side salad and bread to create a complete meal.



Additionally, **consumers report using frozen foods more frequently with the advent of the air fryer**, given the appliance's ability to enhance texture and flavor.<sup>2</sup> This trend is evident in the increased sales of **air fryer-friendly frozen foods, which have reached \$6.1 billion.<sup>3</sup>**

<sup>1</sup> Circana, LLC, Total US - MULO+ Conv, All Frozen Department Products, Dollar Sales, 52 Weeks Ending October 20, 2024  
<sup>2</sup> Yogi Consumer Insights Platform ([meetyogi.com](https://meetyogi.com)), Frozen Food, September 2024  
<sup>3</sup> Circana, LLC, Total US - MULO+ Conv, 52 Weeks Ending October 20, 2024 (Leveraging Nielsen IQ Label Insight Air Fryer Friendly Attribute)

# The Future of Frozen Food 2025 Trends



**1 MODERN HEALTH**



**2 ELEVATED IN-HOME EXPERIENCES**



**3 GLOBAL CUISINE**



**4 BITES & MINIS**



**5 SPICE & HEAT**



# MODERN HEALTH

As emerging health needs and dietary interests such as **portion control, gut health, and better-for-you sweets** grow, consumers are increasingly turning to frozen foods. A wide assortment of health-focused options are available in the frozen aisle, spanning categories like appetizers, meals, and desserts.

One of the most significant disruptors in modern healthcare is the rise of **Glucagon-like peptide-1 (GLP-1) medications**. Used to help manage Type 2 diabetes and obesity, they work by mimicking the GLP-1 hormone, which helps regulate blood sugar levels, slows stomach emptying, and promotes a feeling of fullness. GLP-1 users currently represent nearly **6% of the U.S. adult population**, around 15 million individuals. Of this group, 36% of users are using the medication purely for weight loss purposes, while 41% are using only for Type 2 diabetes management. During the last year and a half, the “weight-loss-only” group has driven most of the adoption growth.<sup>1</sup>

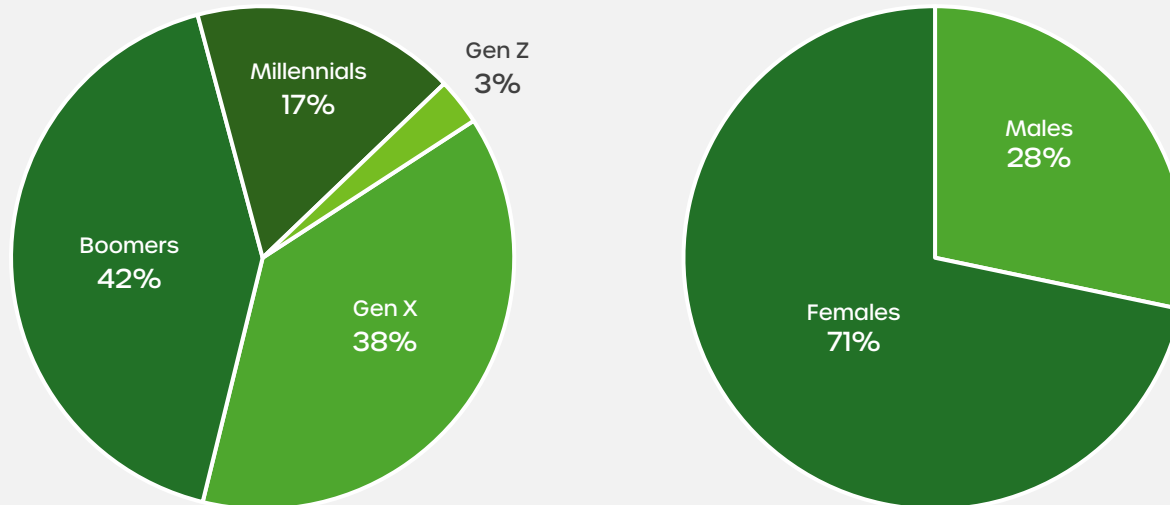


**69% of weight-loss only GLP-1 users are Millennials or Gen X, whereas 55% of Diabetes only users are Boomers<sup>1</sup>**

# THE RISE OF GLP-1 FRIENDLY FROZEN FOODS

GLP-1 medications are increasingly popular, with users seeking food and beverage options that are **low-calorie, high-protein, and a good source of fiber**. Frozen foods can help meet these needs conveniently, with **categories like single-serve meals, multi-serve meals, and appetizers seeing increased spending among GLP-1 users.**<sup>1</sup>

## GLP-1 User Demographics<sup>1</sup>



Health-focused single serve frozen meals, such as Healthy Choice, see the largest growth among GLP-1 users<sup>1</sup>



Relevant Conagra products will include an **“On Track” badge** and descriptions, making meal options that help meet these users' needs easier to find and accelerating the growth of GLP-1 friendly products.

# BETTER-FOR-YOU DESSERTS CATERING TO ALL GENERATIONS

Better-for-you desserts have steadily evolved, with continued growth driving the popularity of **plant-based** options and frozen treats focused on **sugar management**.



These better-for-you options appeal to both younger and older generations, with vegan and non-dairy frozen desserts gaining popularity among Gen Z and Millennials<sup>1</sup>, and sugar-free options attracting Boomers and Seniors.<sup>2</sup>

**Gen Z and child-free Millennials** are 17% and 47% more likely to purchase vegan and non-dairy frozen desserts, respectively.<sup>1</sup>

# FROZEN FOODS & GUT HEALTH

Consumers are increasingly drawn to foods that promote **gut health**, viewing a healthy digestive system as essential for overall wellness and for feeling good from the inside out. This growing interest is reflected in over **26 million Google searches for probiotics, prebiotics, and gut health** in the last year.<sup>3</sup> New products with added benefits and ingredient swaps are emerging in the frozen food aisle to meet this demand.

**Frozen products with prebiotic and probiotic gut health claims have grown 33%** during the past three years, led by frozen breakfast items up 49% and frozen novelties incorporating nutrient-dense gut-friendly alternatives like Greek yogurt up 34%.<sup>4</sup>

1. Circana, LLC, Scan Panel, US, Modern Health, Frozen Desserts, Vegan & Non/No Dairy by Generation, NBD Dollars, 52 Weeks Ending November 3, 2024  
2. Circana, LLC, Scan Panel, US, Modern Health, Frozen Desserts, No Sugar by Generation, NBD Dollars, 52 Weeks Ending November 3, 2024  
3. Similarweb Google Search Volume, Food and Beverage Websites, September 2024  
4. Circana, LLC, Total US - MULO+ Conv, Modern Health, Total Frozen Department, Probiotics by Category, Volume Sales Percent Change, YE October 2021 v. YE October 2024



# ELEVATED IN-HOME EXPERIENCES

While more people are choosing to stretch their budgets by eating at home, the flavors and excitement of restaurant-quality meals are still desired. Frozen food is meeting this demand by offering **premium, chef-inspired products that save on preparation time, while still providing elevated tastes and indulgence**. The trend is further supported by the growth of chef and celebrity licenses in frozen foods, **bringing household names into the kitchen**.





# RECREATING THE RESTAURANT EXPERIENCE

**In-home eating has increased, with an additional 25.6 billion in-home eating occasions since pre-pandemic.<sup>1</sup>** Consumers, facing inflationary pressures, are recreating restaurant dishes at home. Google searches for **“copycat” recipes** of top 200 U.S. chain restaurants reached 18 million searches this year, a 9% rise versus the prior year.<sup>2</sup> “Copycat” searches across the P.F. Chang’s Bistro menu grew 13%.<sup>2</sup> Conagra has expanded the P.F. Chang’s Home Menu® and Frontera® offerings to help consumers more easily enjoy restaurant experiences in their own kitchens.





Among complete meal solutions, “premium” frozen brands are surpassing “value” and “mainstream” options in handhelds, single-serve meals, and frozen pizza as consumers seek elevated in-home experiences.<sup>1</sup> **Premium frozen sides and prepared vegetables, up 3% and 11% respectively,**<sup>2</sup> are also being used to elevate meals without sacrificing convenience. Restaurant-inspired preparation methods like **“fire-roasted”** and premium ingredients like **truffle oil** and **brown butter** are

increasingly popular in online social media conversations<sup>3</sup> and Google searches,<sup>4</sup> becoming more accessible for in-home use through frozen foods.



Frozen desserts also make it easy for consumers to enjoy gourmet treats like cheesecakes and pies, offering the indulgence of desserts that are often too time-consuming or challenging to make from scratch.

Frozen desserts remain popular year-round, with seasonal peaks in pie sales during the busy holiday season. In fact, **frozen pies sell 45% more volume in the fall and 10% in the winter.**<sup>5</sup>

Dolly Parton owns all rights to the Dolly™ and DOLLY PARTON™ trademarks, as well as her name, image and likeness, which are used under license by Conagra Brands.

1. Circana, LLC, Total US – MULO+ Conv, Frozen Food by Category, Volume Sales Percent Change vs. YA, 52 Weeks Ending October 20, 2024
  - Value = Brand price per volume is less than 80% of category price per volume
  - Mainstream = Brand is between 80% and 120% of category price per volume
  - Premium = Brand is more than 120% of category price per volume
2. Circana, LLC, Total US – MULO+ Conv, Frozen Sides by Category, Volume Sales Percent Change vs. YA, 52 Weeks Ending October 20, 2024
3. Tastewise, 12 Months Through October 2024
4. Similarweb Google Search Volume, All Websites, September 2024
5. Circana, LLC, Total US – MULO+ Conv, Frozen Pies, Volume Sales Percent Change by Season, 52 Weeks Ending September 22, 2024



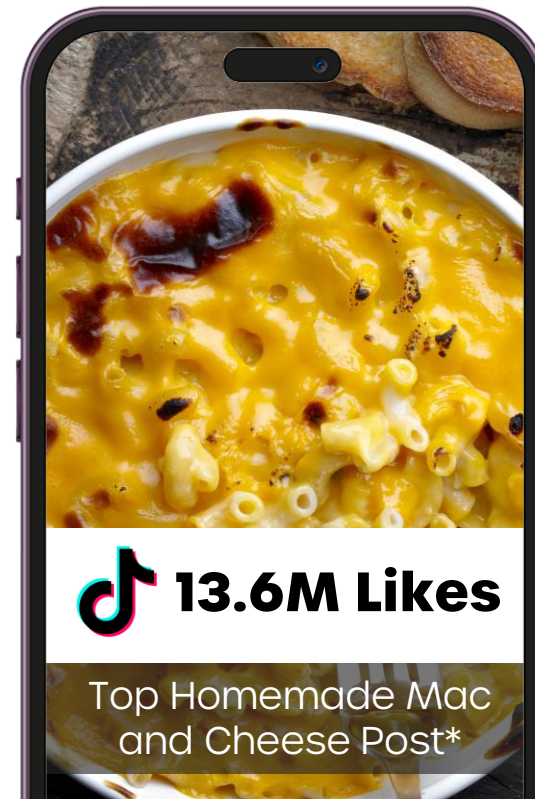
# BRINGING AN ICON HOME FOR DINNER

Consumers are finding new ways to elevate their at-home dining experiences by turning to frozen products created in partnership with celebrity chefs and trusted icons. These licensed offerings bring a sense of premium quality and restaurant-level indulgence straight to the kitchen. The popularity of **celebrity-inspired frozen foods** is evident, with the space **generating over \$175 million in sales and achieving 22% growth year-over-year.**<sup>1</sup>

For example, Conagra's collaboration with **Dolly Parton** showcases her **signature Southern cooking expertise** with products like Homestyle Macaroni and Cheese, delivering classic comfort with a trusted, elevated touch.



**Mac and cheese** remains popular with **38 million Google searches**<sup>3</sup>, making it a top homemade recipe



One viral homemade mac and cheese recipe video garnered **13.6 million Likes and 4+ million Saves on TikTok**<sup>2</sup>

Dolly Parton owns all rights to the Dolly™ and DOLLY PARTON™ trademarks, as well as her name, image and likeness, which are used under license by Conagra Brands.

1. Circana, LLC, Total US - MULO+ Conv, Weeks Ending October 20, 2024

2. Tik Tok, November 2024

3. Similarweb Google Search Volume, Food and Beverage Websites, September 2024

# GLOBAL CUISINE

**Flavors and cuisines from around the world continue to increase in popularity** as consumers enjoy a variety of convenient and easy-to-prepare options. The sustained popularity of global flavors, such as **Asian, Indian, Thai, and Mediterranean**, has led to new products that satisfy this growing consumer interest.





# GOING GLOBAL

Global cuisine continues to expand in the frozen aisle year after year. While **Italian, Chinese, and Mexican** remain the largest cuisines<sup>1</sup>, **Indian, Japanese, and Cajun** cuisines have shown the most growth.<sup>2</sup>

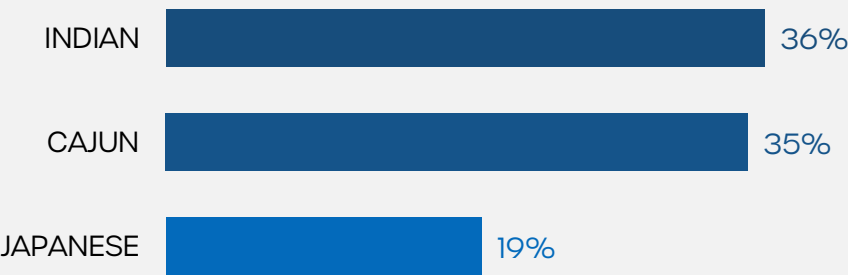
## LARGEST GLOBAL CUISINES<sup>1</sup>

Dollar Sales



## FASTEST GROWING CUISINES<sup>2</sup>

Volume % Change vs Three Years Ago



## Tikka

reached 11.1M Google searches<sup>3</sup>

Indian dishes like Butter Chicken and Tikka Masala continue to trend particularly high, as identified in the 2024 edition of The Future of Frozen Food Report. **Plant-based Indian options like paneer and dal** are increasing in popularity and could be next to appear in the frozen aisle.<sup>4</sup> In terms of consumer interest via Google searches, Japanese cuisine leads, with top searches including **katsu, udon, and teriyaki**, followed by Indian and Cajun related searches.<sup>3</sup>

## Teriyaki

reached 16M+ Google searches<sup>3</sup>



The Purple Carrot Trademark is being used under license from Three Limes, inc. d/b/a The Purple Carrot<sup>®</sup>  
1. Circana, LLC, Total US - MULO+ Conv, Ethnic Frozen Single Serve Meals by Product, Dollar Sales, 52 Weeks Ending October 2024.  
2. Circana, LLC, Total US - MULO+ Conv, Ethnic Frozen Single Serve Meals by Product, Volume Percent Change, YE October 2021 v. YE October 2024.  
3. Similarweb Google Search Volume, All Websites, September 2024  
4. Tastewise, 12 Months Through October 2024



**As global cuisine continues to grow in popularity, each generation has its own distinct preferences.** Younger generations prefer and are more likely to purchase frozen single-serve meals with an Indian, Thai, Mediterranean, and Cajun influence. While Gen X and Boomers generally prefer American dishes, they are slowly showing increased interest in Chinese cuisine.<sup>1</sup> Conagra addresses generational preferences with products like

Healthy Choice Cajun-Style Chicken & Sausage Power Bowls and Marie Callender's Asian offerings.



1. Circana, LLC, Scan Panel, US, Ethnic Frozen Single Serve Meals by Product and Generation, NBD Dollars, 52 Weeks Ending November 3, 2024



# STREET FOODS DRIVING GROWTH

Global street food in frozen formats is booming, with **\$543.5 million in sales and growing 26% over the past two years**. For consumers seeking value, frozen street food offers affordability without sacrificing flavor or experience. Building off its recent growth trend, **Asian appetizers like dumplings dominate, making up 70% of global street food dollar sales**. Beyond affordability, these options make it easier than ever to explore new cuisines, with Japanese, Indian, Mexican, and Latin-inspired flavors driving innovation and bringing global tastes to everyday kitchens.<sup>1</sup>

**Younger generations, especially Gen Z, are driving the popularity of frozen global street foods** as they are 24% more likely to purchase these products.<sup>2</sup>

## BIRRIA

A flavorful Mexican dish consisting of meat cooked in a rich, spiced broth, and often used in street tacos, reached 21 million Google searches<sup>3</sup>

**Samosas and bao buns** are particularly hot, with younger generations being 31% more likely to buy frozen Samosas and 87% more likely to buy frozen bao buns compared to other buyers.<sup>2</sup>

## TOP FIVE FASTEST-GROWING GLOBAL STREET FOODS<sup>1</sup>



**Bao Buns, +583%**



**Tacos, +54%**



**Samosas, +32%**



**Empanadas, +31%**



**Dumplings\*, +18%**

1. Circana, LLC, Total US - MULO+ Conv, Frozen Global Street Foods, Volume Sales Percent Change, YE October 2022 v. YE October 2024 \*Dumplings also includes gyoza and wontons  
2. Circana, LLC, Scan Panel, US, Frozen Global Street Foods by Product and Generation, NBD Dollars, 52 Weeks Ending November 3, 2024  
3. Similarweb Google Search Volume, All Websites, September 2024

# BITES & MINIS

Bites and mini portions continue to be a growing trend, building on the strong momentum identified in last year's Future of Frozen Food report and proving their continued popularity.

These items are especially favored by younger generations and families with young children. Frozen bites and minis are **not only convenient but also offer a diverse array of options for any occasion**. They are particularly popular during the fall and winter seasons when parties and entertaining dot the calendar.





# FROZEN BITES AND MINIS: A \$2.4 BILLION MARKET BOOM

**Bites and minis in the frozen food department have grown significantly**, with more than \$2.4 billion in sales<sup>1</sup> and a 31% increase in consumption year over year,<sup>2</sup> with new varieties constantly emerging, such as “poppables.” Popular among Gen Z and Millennials, these consumers are significantly more likely to purchase frozen bites and minis compared to the average buyer.<sup>3</sup> Savory options account for most of the category’s consumption and have grown by 36%.<sup>2</sup> Notable example products include Bertolli Arancini and Toasted Ravioli.



Frozen breakfast items, including **mini sweet options** and **egg-based bites**, are also seeing strong growth.<sup>4</sup>



Bertolli® is a registered trademark of Mizkan America, Inc., used under license

1. Circana, LLC, Total US - MULO+ Conv, Frozen Bites & Minis by Product, Dollar Sales, 52 Weeks Ending October 20, 2024
2. Circana, LLC, National Eating Trends®, Future of Frozen Initial Exploration - November 2024, Home/Retail, Size/Trend Frozen Bites/Minis, YE September 2023 v. YE September 2024
3. Circana, LLC, Scan Panel, US, Frozen Bites & Minis, Household by Generation and LifeStage, NBD Dollars, 52 Weeks Ending November 3, 2024
4. Circana, LLC, Total US - MULO+ Conv, Frozen Bites & Minis, Breakfast Food, Volume Sales Percent Change, YE October 2021 vs. YE October 2024

# 'TIS THE SEASON FOR FROZEN SNACKS

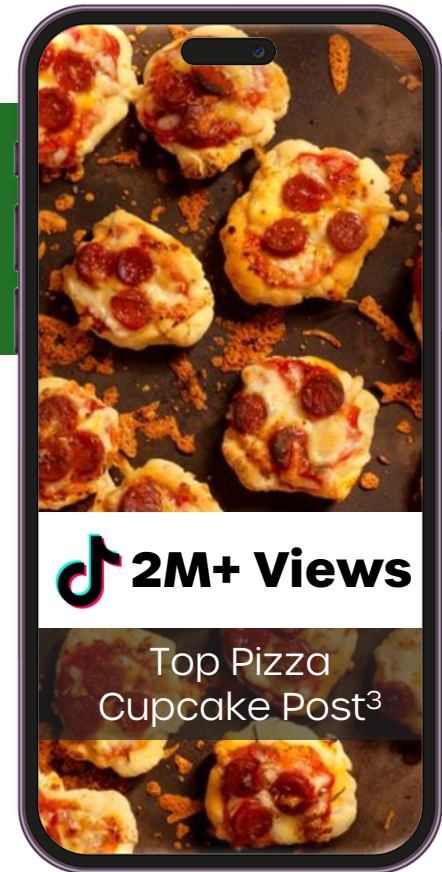
Frozen bites and minis are gaining popularity for their convenience and variety and are especially relevant in Fall and Winter for events such as gamedays, tailgates, and holiday parties.

Google searches for “appetizer” peak from October to January<sup>1</sup>



Among the top-growing categories, **frozen seafood bites** saw an impressive 50% growth year-over-year, while **chicken bites** grew by 21% year-over-year, alongside **traditional American appetizers like pretzel dogs, bagel/puff pastry dogs, and corn dogs.**<sup>2</sup>

Social media recipes showcase new formats of bites and minis, such as baking **savory appetizers in cupcake pans**



1. Similarweb Google Search Volume, All Websites, September 2024  
2. Circana, LLC, Total US - MULO+ Conv, Frozen Bites & Minis, Meat/Poultry/Seafood, Volume Sales Percent, YE October 2023 vs. YE October 2024  
3. Tik Tok, November 2024



# THE EVOLUTION OF BITES AND MINIS

Bites and minis continue to grow as a leading trend in the frozen aisle, and insights from Google search data and social media reveal exciting opportunities for what could come next. **Protein-based bites**, including chicken and steak are particularly gaining attention, with double digit Google search volume growth, showing strong consumer interest.<sup>1</sup>

These are not just traditional breaded nuggets, but rather more elevated or “better-for-you” varieties that align with modern eating trends.



**Cheese-based bites** are also gaining momentum, moving beyond classic mozzarella sticks to include options like cottage cheese (a rising high-protein favorite), parmesan, and brie bites. Search volume for these options have grown 31% year-over-year.<sup>1</sup>

Globally inspired bites and minis are popular today, as their **smaller, approachable format makes exploring global flavors more accessible and less intimidating**. Ultimately, this allows consumers to sample new cuisines without committing to a full meal. This success positions global bites and minis to continue expanding into an even more diverse range of cuisines, bringing flavors from around the world to consumers' plates.



**Bites and minis are no longer just appetizers—84% are now being enjoyed as meals**, especially growing at breakfast.<sup>3</sup> This versatility, paired with evolving flavors and forms, ensures bites and minis will remain a staple in the frozen aisle, delivering on consumer demand for convenience, variety, and indulgence.

P.F. CHANG'S and P.F. CHANG'S HOME MENU are registered trademarks owned by P.F. Chang's China Bistro, Inc. and are used under license.

1. Similarweb Google Search Volume, Keywords with "Bites", "Minis", and "Poppables", All Websites, September 2024

2. Instagram, November 2024

3. Circana, LLC, National Eating Trends®, Future of Frozen Initial Exploration - November 2024, Frozen Bites & Minis, Occasions, Percent of Eatings, YE September 2023 v. YE September 2024



# SPICE & HEAT

**Hot and spicy flavors are heating up in popularity, driven especially by younger generations who crave bold and adventurous tastes.** These flavors are thriving across a variety of food categories, with new and diverse spice profiles capturing attention. In the frozen aisle, this trend is particularly evident as innovative dishes featuring unique and globally inspired spices continue to emerge, offering consumers exciting ways to turn up the heat at home.



# YOUNGER GENERATIONS EMBRACE SPICY FOODS

Younger generations, especially Gen Z, have a strong preference for spicy foods. This trend is evident across all grocery store categories but is particularly notable in frozen single-serve meals. In fact, **Gen Z is 48% more likely to buy spicy frozen meals** compared to the overall consumer.<sup>1</sup>



# SPICY FOODS APPEAL TO DIVERSE HOUSEHOLDS

Non-white households are nearly **20% more likely to buy spicy frozen items than the overall consumer**. Spicy foods are most popular among Black households, followed by multi-ethnicity, Asian, and Hispanic households.

Specifically, these households are 42% more likely to purchase frozen spicy chicken products and 55% more likely to buy frozen spicy red meat/sausage products compared to the overall consumer.<sup>2</sup>





# HEATING UP THE FROZEN AISLE

Spicy foods in the frozen aisle have reached **\$2.0 billion in sales**. Top heat-packing frozen categories include chicken (41% of total spicy frozen dollar sales) frozen single-serve meals (20%), and frozen handhelds (12%).<sup>1</sup>

While **buffalo is the leading spice profile by far (37% of sales)**, alternative spice profiles are emerging onto the scene.<sup>1</sup>

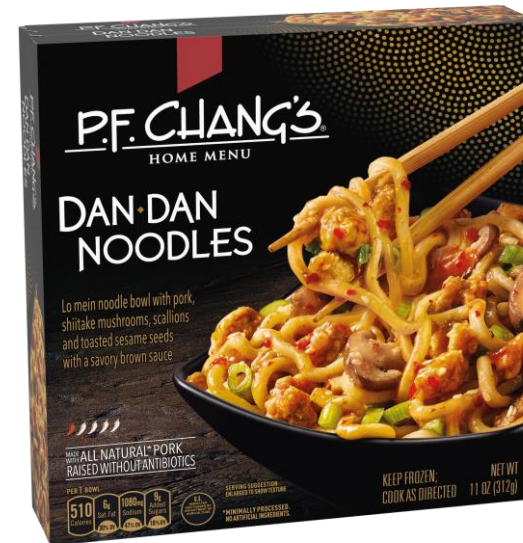
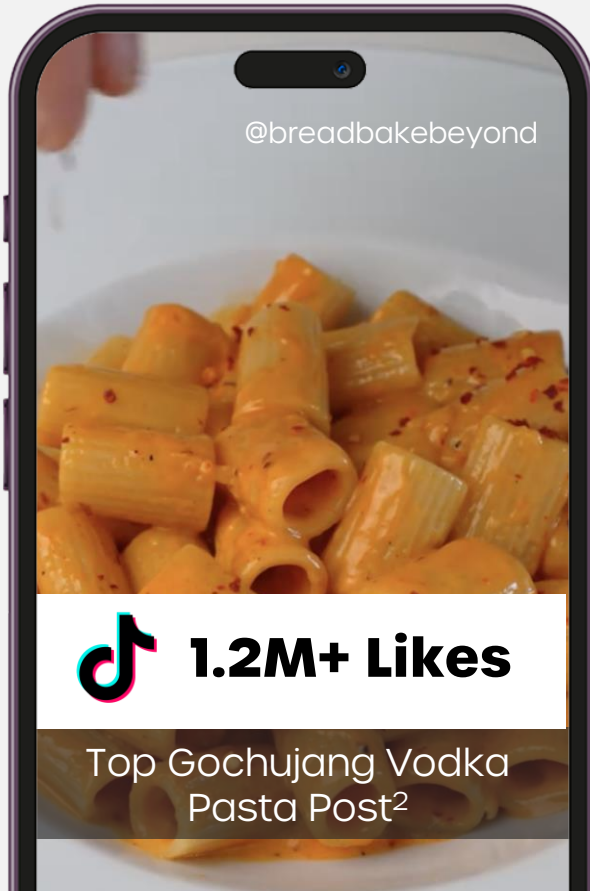
**Hot honey** is now almost \$20 million in sales, +74% versus one year ago<sup>1</sup>

**Hot honey**, highlighted in the Future of Frozen Food 2024 report, and **spicy pepperoni** are two of many rapidly growing spice profiles in the frozen food aisle, opening the door for dishes like Evol® Hot Honey Chicken and Alexia® Hot Honey Carrots.<sup>1</sup>



# INTERNATIONAL INNOVATIONS ARRIVING NOW

Trending conversations on social media reveal the next wave of spice profiles and spicy dishes poised to hit the frozen aisle. International flavors are driving this momentum, with bold, spicy ingredients trending across multiple cuisines. Korean spices like **gochujang** and **gochugaru**, which were identified as “hot” flavors in the Future of Frozen Food 2024 report, continue to gain traction. **Chili crisp**, a popular Asian condiment, is also rising in visibility.<sup>1</sup>



When it comes to dishes, **spicy beef bulgogi** and **spicy dan dan noodles** are capturing consumers' interest.<sup>1</sup> A standout example that reflects the growing demand for globally inspired spicy meals in the frozen aisle is P.F. Chang's Home Menu Dan Dan Noodles, now one of the brand's top fastest selling products.<sup>3</sup>

1. Tastewise, 12 Months Through October 2024  
2. Tik Tok, November 2024  
3. Circana, LLC, Total US - MULO+ Conv, P.F. Chang's Brand by Product, Frozen Single Serve Meals, Home Menu Pork Noodle Savory Sauce Bowl, Dollar Velocity per SKU, 52 Weeks Ending October 20, 2024



# ABOUT CONAGRA BRANDS

Conagra Brands, Inc. (NYSE: CAG), is one of North America's leading branded food companies. We combine a 100-year history of making quality food with agility and a relentless focus on collaboration and innovation. The company's portfolio is continuously evolving to satisfy consumers' ever-changing food preferences. Conagra's brands include Birds Eye®, Duncan Hines®, Healthy Choice®, Marie Callender's®, Reddi-wip®, Slim Jim®, Angie's® BOOMCHICKAPOP®, and many more. As a corporate citizen, we aim to do what's right for our business, our employees, our communities, and the world. Headquartered in Chicago, Conagra Brands generated fiscal 2024 net sales of more than \$12 billion. For more information, visit [www.conagrabrands.com](http://www.conagrabrands.com).

