

[frozen food] dossier

ISSUE 2/2024



**STATE
OF THE 2024
FROZEN
FOOD
INDUSTRY**



Get your updates right from the core of the potato processing industry

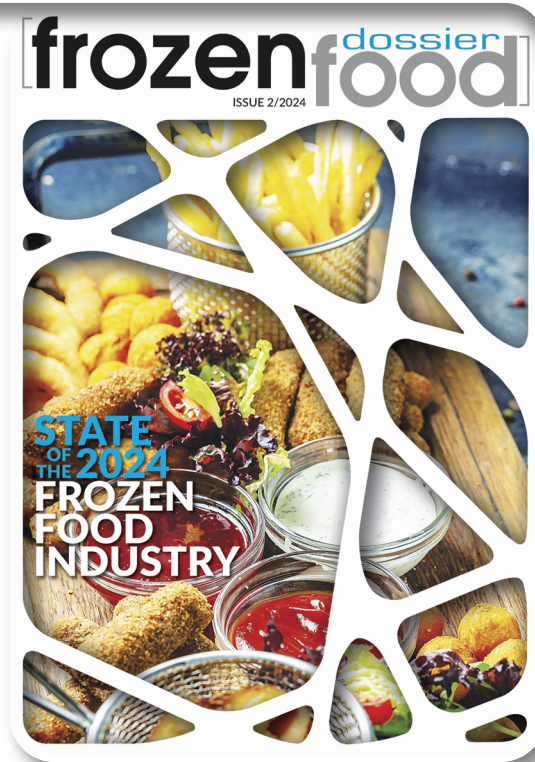
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POTATOBUSINESS DIGITAL



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CONSUMERS TURN TO PURPOSEFUL SPENDING

Aug

BOGDAN ANGHELUTA
editor in chief

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According to a recent report from NielsenIQ, global consumers show determination and resilience during the continued economic

challenges. The 'Mid-year Consumer Outlook' for the first half of 2024 points out that from cautious, people now move to intentional consumption. Compared to 12 months ago, only 32% of consumers feel worse off financially - a big improvement on the start of 2023. This bounce in consumer confidence would hint at a growing economic optimism, even as challenges persist. However, many concerns continue to weigh upon the minds of consumers: utility expenses, driven by soaring food prices, are some of the top factors weighing heavy on the minds of consumers with the threat of an economic downturn. As inflationary pressure starts to ease, consumers are less obsessed with increased everyday bills, the report observes, and more concerned with

personal welfare, happiness, and job security. This trend underlines the state of consumer determination and their intent to make more purposeful spending decisions as they head into 2025. Inflation by various product categories, as analyzed by NielsenIQ, indicates some interesting trends. The highly inflated departments include Home Care, Confectionery & Snacks, and Pet Food. Categories such as Frozen Food, Food Perishables, and Health Care are among those seeing easing prices. For companies in these categories, the challenge will be to drive additional volume without overpromoting or devaluing their offerings. Growth above inflation is achievable, but an integrated understanding of all the available consumer targets and how consumers at different income levels allocate their spending across categories is needed. So, while economic tensions may still be high, consumers are likelier to show a little more leeway when purchasing. What's your take on this? Let me know at bogdan.angheluta@trade.media. ●



Categories such as Frozen Food, Food Perishables, and Health Care are among those seeing easing prices. For companies in these categories, the challenge will be to drive additional volume without overpromoting or devaluing their offerings.



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PUSHING THE BOUNDARIES



At a time when healthy eating has been propelled to the top of household agendas, the frozen finger food market is at an ultimatum. Relinquishing cravings for deep-fried and processed treats, shoppers are reaching out toward frozen finger foods that will answer to their diet and wellness tendencies. In that respect, the category of frozen snacks and appetizers has changed significantly: from serving basic, convenient options to a broad-based, advanced offering.

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hat evolution has come hand in hand with increased consumer demand for high-quality restaurant experiences at home. Indeed, entrepreneurs push the

boundaries even further by innovating products with gourmet, artisanal, and ethnically diverse inputs. This trend toward premium, ready-to-serve products will enable companies to respond to the increased demand of consumers for convenience with quality taste and without wastage. According to a report by Grand View Research, the global healthy snacks market was valued at USD95.61bn in 2023, while growth would be annual, at a rate of 6.2% from 2024 to 2030. Growing busyness of lifestyles, more city dwellers, changes in food preferences of consumers, and demand for convenient and portable snacks that can be consumed at any time on the go-the key end-drivers of the industry. They want snacks that are convenient to take along with them and consume, and those that fall under their dietary specification. The growth in dietary restrictions and preference for gluten-free, animal-free, and organic foods has really driven manufacturers to become more innovative and diversify their products to meet these needs. People are putting in place healthier ways of eating due to the increased cases of obesity and chronic diseases like diabetes, heart disease, and high blood pressure. For instance, the Centers for Disease Control and Prevention report that out of every ten Americans, four were obese. In Europe, the Organization for Economic Co-operation and Development showed that out of every six individuals, one was obese while over 50 percent of adults in the region weighed more than their ideal weight. Healthy snacking is observed to counteract such health issues due to the low calorie, sugar, and fat content when compared with traditional snacking foods. Whisps-whose high-protein snack foods are made from real cheese-presented a new survey in light of changed trends in American snacking behavior. The latest survey, which took in more than 2,000 American adults this April 2023, illustrates that it is big to see a trend of people replacing an

average of four meals per week with snacks. While more people were grazing throughout the day, an astonishing 79% of adults wanted to snack healthier. This information helps a growing trend toward convenience and nutrition in snack foods among Americans, reflecting a new tide in eating more thoughtfully and desiring healthier snacking



USD95.61bn
was the value of the global healthy
snacks market (2023).

options. Companies also introduce healthy, convenient, delicious, and attractive snacks for a wide variety of tastes and eating behaviors. The low/ no sugar snacks segment share was 39.0% in 2023. According to a survey done by Whisps, in 2023, 79% of Americans are trying to eat healthier snacks. Another trend is toward protein-based snacks. The gluten-free snacks category will grow at an annualized rate of 7.5% per year from 2024 to 2030. Increasingly growing awareness associated with gluten sensitivity and the escalating demand for dietary alternatives by consumers is driving the gluten-free claims market in the healthy snacks category.



PRODUCTS FOR ALL TASTES

This year at SIAL, **Frostkrone Food Group** is bringing a true festival of finger foods, showcasing a wide range of innovative snacks that reflect the richness of international cuisine. Known for its creative approach to snacks,

Frostkrone promises to delight visitors with unique, globally inspired flavors in bite-sized formats. "SIAL in Paris is one of the key international trade shows for us to showcase our latest innovations," says Emiel Lommen, global commercial director of Frostkrone Food Group. "This year, we're putting the spotlight on global flavors. Visitors can enjoy premium finger foods that bring the world's culinary diversity into delicious, easy-to-eat bites." Frostkrone will be unveiling several new finger food creations at SIAL, including Burger Balls (a bite-sized twist on the classic burger. Ideal for any occasion, these tasty balls come in five irresistible flavors: Cheese, BBQ, Bacon, Fish, and Chicken); Maxxarella (the ultimate treat for mozzarella enthusiasts, these crispy, golden bites are filled with gooey, melted mozzarella, offering a perfect combination of crunch and cheesy indulgence); Arancini (inspired by Sicily's street food, these crispy fried rice balls are filled with mozzarella and basil and served with a spicy cheddar sauce for an extra flavor kick. A little taste of the Mediterranean in every bite); and Feta and Hot Honey Bites (a delicious blend of feta, creamy soft cheese, and tangy processed cheese, finished with a touch of honey and a chilli kick. Wrapped in a crispy wheat flake coating, these bites are a real crowd-pleaser). Frostkrone Food Group is renowned for its innovative approach to finger foods and snacks, offering a range of products that reflect the latest food trends. With eight global locations, the company consistently develops new, exciting creations that cater to consumer preferences.

MORE MARKET INNOVATIONS

The Razorback Nuggets joined the collection of **Tyson Foods** fun nuggets that also includes Spooky Nuggets shaped like ghosts, bats and pumpkins, and the perennial kid-favorite Dino Nugget. They are an excellent source of protein with 13 grams per serving, fully cooked and skillfully breaded, and are ready in under seven minutes in an air fryer. The brand's portfolio of products includes Tyson Fresh and Frozen Chicken, Any'tizers Snacks, Tyson Chicken Nuggets, and Crispy Strips. With the introduction of Mini Fish Fingers, **Birds Eye** is expanding its main line of fish items. With this introduction, retailers can take advantage of the chance to unlock incremental sales through innovation and capitalize on the growing demand for frozen food across a wider range of circumstances. For more than half of UK customers, fish fingers are a weekly habit. Fish fingers are a staple of more than 25% of frozen food meal occasions and are driving the category's overall growth with a robust value growth of +6.8% versus YA. Since before the lockdown, the usage of frozen foods has increased significantly (+17% and +26%, respectively, compared to 2019). As the most popular fish finger brand in the UK, Birds Eye is in a great position to take advantage of this trend and contribute to increased sales with this launch.

Aviko has brought back their renowned Hash Brown Bites due to high demand, providing operators with a satisfying and adaptable option for today's busy menus. Aviko's Hash Brown Bites are now available to foodservice operators and are free of gluten and plant-based ingredients. These adaptable golden nuggets are a delicious substitute for fries since they have a crisp, crunchy exterior and a soft, fluffy potato inside. They also bring a creative touch to brunch and breakfast events, and their grab-and-go options help operators stay ahead of the curve in two rapidly expanding markets. Chefs and caterers can take advantage of their quick and simple preparation time, as well as their adaptability to be consumed alone with a dip, loaded with cheese, or as a side. Ready to serve from frozen in 3.5 minutes when fried. Meeting dietary requirements, Aviko's Hash Brown Bites are proudly certified gluten-free and vegan friendly and are suitable for all foodservice operators including quick-service restaurants, pubs, bars, on-the-go or delivery thanks to their long holding time. Aviko's Hash Brown Bites come frozen and are available now in 4x2500g cases, they rejoin Aviko's vast portfolio of professional potato products developed with foodservice operators in mind. ●



79%

of Americans said they were trying to eat healthier snacks (2023).

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ALWAYS IN DEMAND



Sales of frozen potato products – be it French fries, tater tots, or hash browns remain steady even when consumers are faced with inflationary. For context, it should also be mentioned that foodservice operators have returned to a faster expansion pace, and that will provide further go-to-market opportunities for processors.

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he frozen potato industry is likely to continue posting a high growth rate globally; its market value is set to rise from USD67.27bn in 2023 to USD89.51bn by 2029,

thus achieving a CAGR of about 5% during the forecast period. Despite this upbeat outlook, the newest figures for the first quarter of 2024 reveal some surprising turns in the short term. The world's leading French fry producers exported 1.10 million tons of fries and other frozen potato products to markets outside their respective local trading areas, which is a marginal decrease of 4,082.3 tons or 0.4%, compared to the same period a year earlier. This was essentially because of lower shipments from the large European fryers. The Netherlands, Poland, Germany, and Belgium were all in the red regarding export volumes, which trimmed the EU fryers' external shipments by 4.4%, to 736,634 tons for the quarter. Not all countries, however, report the same scenario. Fryers in North America, led by

major increases in Canadian offshore sales, shipped 258,275 tons of frozen potato products to offshore markets during Q1 2024, a gain of 6.8% compared to the corresponding period of the previous year. Besides, other minor exporters such as Canada, China, France, New Zealand, and Turkey also reported double-digit sales increases for the quarter. But what really made the difference was exceptional growth in China, reaching a record 39,643 tons of products shipped outside of greater China, up 13.6% compared with the prior year. This performance underlines the dynamics of the market and the opportunities for emerging players to make remarkable strides. The competitive scenario is still intense, with key players striving to increase their market shares by way of product innovation, strategic partnerships, and geographic expansion. North America dominates the global market scene at present, with the United States leading the fray. This can be attributed to increasing demand brought about by busy, working consumers and the increasing popularity of convenience food products.



A GLOBAL OUTLOOK

In Europe, Germany is one of the biggest food markets, along with having one of the highest consumer demands for convenience foods. Its market is further driven by the high distribution of domestic and international QSR establishments, which are heavy users of frozen potato products. India can be positioned as the largest player in the frozen potato market in the Asia-Pacific region. A large and young population, fast urbanization of the country, and improving standards of living all act as growth drivers. The growth of international fast-food chains, coupled with the increasing use of frozen potatoes by local brands and street food vendors, contributed favorably to the market development in India. The product trend clearly indicates that the French fries' segment is expected to have the maximum share in the market with a growth pace during the forecast period, owing to the globalization of fast-food chains and the convenience factor associated with frozen French fries. Even the introduction of healthier options, like oven-baked or air-fried varieties, attracted health-conscious consumers. The commercial segment accounts for the largest share by market segmentation and is likely to continue being the fastest growing because it covers restaurants, fast-food chains, and catering services. Frozen potatoes reduce preparation time and cost in commercial kitchens, adding value for

high-volume operations. The global frozen potato market keeps on changing, and the dynamics of these changes, as they will play out across different regional markets, are very interesting to note when key players do all they can to stay competitive in this growth industry.

AI-BASED INSPECTION SYSTEM FOR POTATO PROCESSORS

Potato processors understand that foreign objects and incorrect quality grading decrease profitability. To date, potato processors have tried improving sorting with X-ray detection, metal detection, vision inspection technologies, and large groups of human inspectors with very little success. This is why Smart Vision Works, a KPM Analytics brand, has launched a new AI-powered vision inspection solution targeted at solving these persistent problems. The SiftAI Smart Table uses AI to train the system automatically to detect and remove foreign items and sort products in one pass. With more sophisticated AI than competing systems in visual inspection, the new technology will enable businesses to scan products and remove foreign objects at unprecedented speeds. It has customers in a beta program, who are reporting significantly lower labor costs, fewer missed contaminants, and higher profit from their produce. The system includes cameras, AI software, a conveyor, and automatic ejectors with dual drops-one for foreign material, one for culls-all to ensure only perfect potatoes move on to the next steps in the process. The SiftAI Smart Table vision inspection system is competitively priced. Company managers can justify the investment by relocating inspection workers to higher-skill areas. Wages have increased sharply in recent years, so company managers will appreciate the ability to transfer workers from low-skill work. The system also helps processors avoid customer fines for contaminants. For some processors these fines may cost USD50 000 per incident and total hundreds of thousands of dollars per year. Because of the speed of the advanced AI technology, conveyor speeds can be increased, giving operators more throughput per shift. But best of all, the system precisely grades produce using sophisticated evaluation of bruises, rot and green, the company states.. ●



USD 89.51bn
is the estimated value of the global
frozen potato industry (2029).





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THE FUTURE
IS HERE

Technology manufacturers work with food processors in a bid to meet their needs through new and improved machinery. While demands coming from the latter tend to address efficiency, there are various other problems new equipment needs to respond to, among which sustainability, hygiene, and cost reduction.

E

very **Urschel** cutting machine is designed for continuous operation for uninterrupted production to promote industrial level, high capacities, according to Alan Major, chief sales

officer, Urschel. As production volumes fluctuate, Urschel equipment may be run at lower volumes to promote batch processing operations. Additional lines of Urschel cutting machinery or higher capacity models are also available to grow with a processor's needs. The CCL (Chip Cutter Lattice) compared to the new, larger CCLL (Chip Cutter Large Lattice) is an example of this, Major explains. "Although every Urschel cutting application is unique, there may be correlations between products that share characteristics, especially when creating a similar end-product. It comes down to considering such items as density, rigidity, size, shape, temperature, and several other factors when identifying the product entering the dicer or slicer. Depending on the product characteristics, Urschel may recommend preconditioning of product or additional steps prior to feeding into the dicer."

COMPLETE SUPPORT FOR CUSTOMERS

For frozen tempered meats, bacon, or cheese, processors rely on the Affinity Dicer (AFF) the premium USDA Dairy accepted machine, or the smaller Affinity Integra Dicer (Integra) in lower capacity applications, according to Urschel's chief sales officer. For fresh and frozen-tempered chicken breast, pork skin, or leafy green products, a popular choice for many is the new M VersaPro (MVP) Dicer belt-fed dicer which produces two-dimensional cuts. "Customers around the world turn to Urschel to tap into the vast knowledge and unmatched experience in this area. Heavy duty parts, including specially created knives, outboard bearings, and gearing, are available to conquer hard to process products," he adds. As for as customer support goes, Urschel offers complete support over-the-phone, in-person plant visits, or live remotely. Urschel's significant ongoing investment in the global infrastructure of the company give clients peace of mind knowing their local office is there for complete support in terms of maintenance and training for the long life

of their cutting equipment. Urschel speaks the language of food processing and the local language, so important details in customer expectations are met. "As the Global Leader in Food Cutting Technology, Urschel global personnel possess the highest degree of knowledgeable food cutting expertise. Urschel is the number one best-selling provider of industrial food cutting machinery because the company partners with customers to increase their productivity and profitability. Customers embrace Urschel advantages. Urschel designs new patented cutting methods and discovers new shape cuts to assist processors. Urschel continues to develop new knives, parts, components, and machinery to expand and grow with the everchanging demands of the food industry," Alan Major concludes. Urschel offers complete support over-the-phone and in-person plant visits including maintenance plans. Customers may contract maintenance plans at an interval that



Customers around the world turn to Urschel to tap into the vast knowledge and unmatched experience in this area. Heavy duty parts, including specially created knives, outboard bearings, and gearing, are available to conquer hard to process products.

Alan Major, chief sales officer, Urschel



Photo: Urschel

more acidic in nature or tougher on knives. From knives to spindles, wear and tear based on the run hours and type of product and volume are considerations. The type of cut and target precision range of in-spec cuts that is mandated by the food processor is another factor. Food processors need to ascertain at what point knives may need to be swapped out or heads rebuilt based on product build-up. Acceptable routine part replacement protocols may be based on the shift changes or dependent on other production equipment upstream or downstream from the Urschel cutter.

A HOLISTIC APPROACH TOWARDS MAINTENANCE

FAM STUMABO launched the Total Care Program (TCP), a holistic approach that goes beyond meeting the maintenance, training, and refurbishment needs of its customers. TCP represents a core philosophy embedded in every stage of our machine design process. The concluding part of this program is training and a maintenance program for FAM STUMABO machine users. "From the initial phases of development, our engineers consider maintenance and overhaul requirements to ensure long-term efficiency and reliability. This proactive approach has led to the creation of advanced features like quick-to-swap drivetrain cartridges. These cartridges are designed to minimize machine downtime by allowing for swift replacements, while the used components can be serviced and refurbished offline in our dedicated workshops. This seamless process ensures that the next maintenance cycle is executed smoothly, maximizing operational uptime for our clients," FAM STUMABO representatives point out. "With TCP, we are setting a new standard in customer care, ensuring that our machines deliver peak performance with minimal disruption, right from the start and throughout their lifecycle. The Total Care Program is a testament to our commitment to providing comprehensive solutions that not only enhance performance but also streamline the maintenance process, ultimately delivering greater value to our customers." FAM STUMABO believes that exceptional customer support begins with outstanding design and engineering. A striking example is SureTec 240. The cutting machine features the unique concept of the SureCut Unit (SCU). The SCU allows the cutting components to be pre-assembled in one piece and perfectly adjusted, away from the

machine. It allows even non-technically trained operators to install the cutting tools on the machine in a very fast, uncomplicated and error-free manner. Easy removal of the SCU for permits thorough cleaning. The machine includes slip holes in the drum for removing of product residue, rounded tube frames or easily accessible open cutting zones for fast cleaning and visual inspection. FAM STUMABO recognizes the diverse needs of the vegetable and fruit processing industry, where versatility is key. Their machines are designed to handle a broad array of cutting requirements, from dicing and shredding to slicing in both flat and crinkle shapes. This adaptability allows producers to craft a variety of products using a single machine, maximizing productivity and product diversity. To enhance operational efficiency, FAM STUMABO has standardized its cutting tools and knives. This reduces the risk of human error and simplifies maintenance, ensuring consistent, high-quality cuts with every use. Launched in the spring, the Yuran Capcitech is designed specifically for high-capacity processing of peppers and greens. Its robust, 2-meter-long belt system ensures stable product handling, preventing buildup and enhancing cut quality. A driven top belt ensures precise product alignment and transfer to the cutting tools, significantly reducing product fracturing and ensuring a clean, uniform cut. For V-belt slicing applications, the Volantis delivers exceptional performance with its 2-meter-long V-belt system, which perfectly aligns the product for precise cutting. Whether slicing flat, crinkle, or julienne cuts, this machine offers versatile options for product differentiation. The Lifis.2 is a powerhouse for slicing leafy and elongated vegetables such as leeks, celery, and rhubarb. Its transversal V-belt design ensures high performance and precision, making it a vital tool for processors looking to achieve the perfect cut for delicate products. "With a deep understanding of the unique challenges faced by the vegetable processing industry, FAM STUMABO continues to push the boundaries of innovation.



With TCP, we are setting a new standard in customer care, ensuring that our machines deliver peak

performance with minimal disruption, right from the start and throughout their lifecycle.

FAM STUMABO

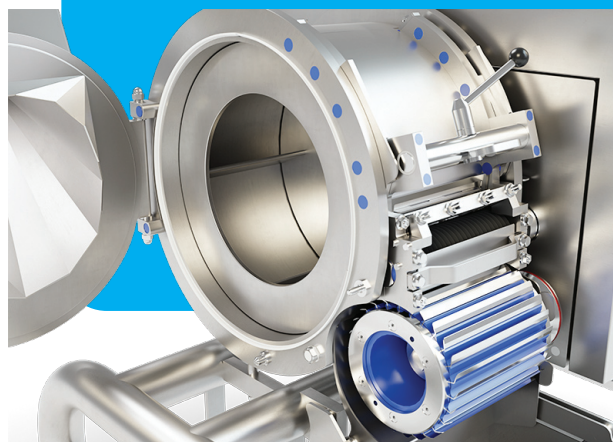


Photo: FAM STUMABO

Together we cut
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NEW

Yuran Capcitech

Robust, high-capacity belt cutter designed for cutting a wide variety of peppers and leafy-type green vegetables, at high capacities



Yuran
Capcitech



SureTec 240

Robust heavy-duty dicer featuring the SureCut Unit, ideally suited for frozen vegetables & large fresh vegetable processors



SureTec
240



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INDUSTRIAL FOOD CUTTING SOLUTIONS



Photo:
TOMRA



TOMRA offers advanced defect detection capabilities, ensuring that only fruits meeting the strictest quality specifications are processed and packaged. This not only improves our production efficiency but also optimizes the quality of the final product, guaranteeing customer satisfaction and compliance with food safety regulations.

Jesús Cruz, manager of Translberian Foods

Their commitment to quality, versatility, and efficiency is evident in each machine they produce, making them a trusted partner for processors around the world. Whether you're looking to streamline your operation, improve product quality, or expand your capabilities, FAM STUMABO has the expertise and technology to help you cut to perfection," representatives add.

ACHIEVING AND MAINTAINING THE HIGHEST QUALITY STANDARDS

Translberian Foods (TIF), an emerging company that specialises in the logistics, storage and packaging of fresh and frozen products serving both domestic and international markets, has chosen **TOMRA Food's** advanced blueberry grading and filling solutions for its blueberry packing line. With the TOMRA KATO 260 advanced, industry-leading precision grading system with LUCAi Artificial Intelligence technology and two TOMRA CURO filling stations, it achieves the extreme flexibility needed to meet the varied and demanding requirements of its international customers. "With TOMRA, we have strengthened our position in the market as a reliable service provider in the European berry market," explains Jesús Cruz, manager of Translberian Foods. "These systems have allowed us to achieve and maintain the highest quality standards demanded by the most prestigious supermarkets. TOMRA offers advanced defect detection capabilities, ensuring that only fruits meeting the strictest quality specifications are processed and packaged. This not only improves our production efficiency but also optimizes the quality of the final product, guaranteeing customer satisfaction and compliance with food safety regulations. This investment demonstrates our commitment to operational excellence, our determination to be a leader in the handling and packaging services sector for berries in Europe and updates our facilities for the berry campaign from Morocco and Spain."

COMPACT SYSTEMS SUITABLE FOR ANY FRUIT SORTING SITUATION

The KATO260 is a compact sorting system suitable for any fruit sorting situation, as it minimizes the space requirements in the facility. It handles the fruit gently to maximize bloom retention and extend its shelf life. Whether sorting fruit into numerous grades or removing defective fruit, the KATO260 offers 5 or 7 outlets for perfect sorting in packing facilities of any size. The packaging process at Translberian Foods begins with the fruit being fed into the KATO260 sorter, optimizing its performance. The fruit is gently loaded into the KATO260, ensuring a continuous supply and uniform distribution in the sorter. Next, the KATO260 exclusive rolling conveyor system inspects the fruit's surface from all angles. Cameras capture multiple images of each piece of fruit, and the machine's software can identify defects as small as 0.2 mm at high speed for precise grading. A valuable optional enhancement for the KATO260 is the LUCAi software and hardware package, which uses Artificial Intelligence to achieve unparalleled accuracy in fruit sorting and grading. After each piece of fruit moves along the sorting line, it is photographed by multiple cameras. LUCAi identifies and indicates how each blueberry should be graded. Capable of processing up to 2,400 images per second, LUCAi can also view the fruit in wavelengths not visible to the human eye, detecting subtle defects such as dehydration, bruising, and early anthracnose. At the end of the line, the fruit is processed by a packing system featuring two CURO16 units, each with 16 filling stations. These units boost productivity by reducing human handling errors and fruit loss. They weigh with precision and can simultaneously pack for different markets. This system is the fastest weight-based filling solution on the market, capable of handling up to 200 packs of 125 grams of fruit per minute. "Investing in TOMRA Food technology has brought multiple benefits to Translberian Foods. One of the most significant has been the increased trust from

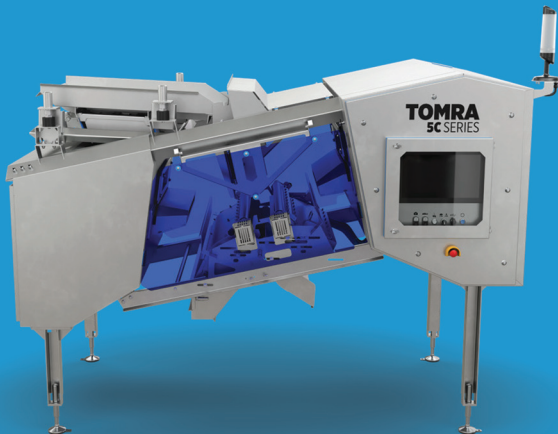


Every Resource Counts™

Transforming the global food industry with sorting, peeling, and grading solutions dedicated to advancing food safety and minimizing waste.



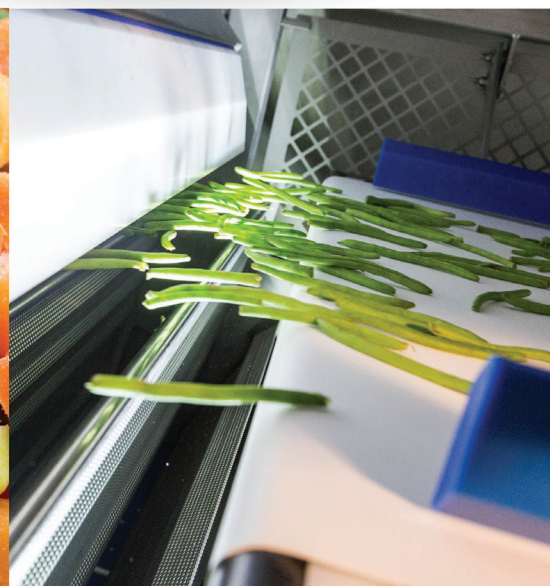
TOMRA 5C



TOMRA 5B



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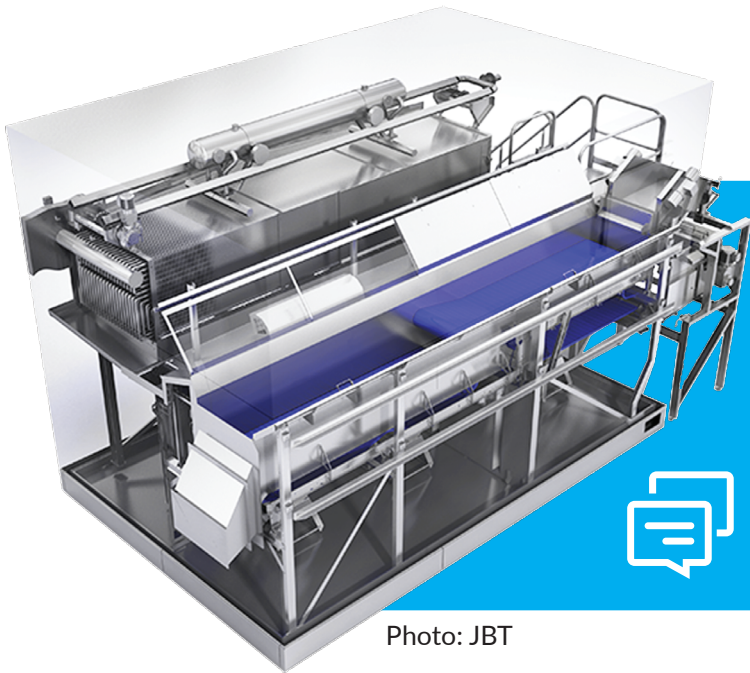


Photo: JBT

Thanks to integration of Urtasun with Frigoscandia and other JBT businesses, we are now able to offer customers complete solutions whereas before customers would have to source certain systems from other providers.



Sergio Rabadan, director of sales for the EMEA region, JBT

our clients. With cutting-edge technology, we can ensure high-quality processing even during peak production times, when our clients may face capacity constraints in their own facilities. Our ability to handle large production volumes efficiently and to the highest quality standards has led many clients to choose outsourcing their packaging services to us.” TOMRA Food’s equipment also offers exceptional packing flexibility: ‘With TOMRA Food’s solution, we can quickly adapt to market demands and efficiently manage demand spikes during peak seasons. We are extremely satisfied with the advanced sorting technology, as it enables us to handle fruit from various sources effectively and ensures we deliver high-quality products,’ concludes Jesús Cruz.

LOCKING IN FRESHNESS

Frozen fruits and vegetables is a market segment that is proving increasingly popular with consumers and retailers worldwide. This popularity is due to their extended shelf life and ability to preserve nutrients. Fresh fruits can lose up to 50% of their nutrients during transportation and packaging but freezing them on the same day they are harvested significantly reduces these losses by slowing down chemical reactions. According to the analyst GlobalData, the value of the global frozen fruit and vegetable market is expected to rise from USD35.9bn in 2023 to an estimated USD48.4bn by 2028. Long-working hours and busy schedules are driving a move towards convenient, pre-cut frozen vegetables and fruits, as consumers prioritize convenience and health-conscious choices. **JBT**’s advanced technologies can improve the quality of frozen fruit & vegetables, preserving taste, texture, and nutrients, and are perfectly suited for vegetables such as peas, cauliflower, broccoli, bell pepper, carrot, beans, mushroom, avocado and corn, and fruits including berries, mango chunks, and other tropical fruits. They are also ideal for pre-prepared vegetables and potatoes that are packaged and ready for cooking; products which are designed to save time and effort in meal preparation. With JBT solutions, the vegetables stay crisp and fresh during the

preparation process, ready to be cooked and enjoyed with highest quality.

THE ‘FROM FIELD-TO-FORK’ FREEZING SOLUTION

For a complete freezing line solution for vegetables, berries and other delicate products, JBT offers a unique combination of innovations that not only increases throughput but also protects your products from freezing damage. This solution ensures product integrity, quality, and flavor while handling up to 18,000 kg per hour. The complete processing line covers everything from inspection & grading, through to chopping, blanching and steaming, before finally moving to individual chilling and freezing; all delivering products that preserve their quality and nutrients for the end consumer. Beginning with inspection and grading solutions, JBT’s range of conveyor and inspection systems – available for every business size – ensure that only the highest quality fruits and vegetables reach the production line. From here, JBT offers precision solutions for cutting, chopping and washing, as well as drying and peeling – all with focus on maintaining quality and retaining the maximum amount of yield by minimizing waste. The next phase, blanching – using the JBT Urtasun Integral Blancher – is hugely important to preserving quality in vegetables. The Blancher’s advanced steamers effectively deactivate enzymes detrimental to color, flavor and texture, plus help retain vitamins. It additionally softens crunchy veg, like broccoli, making them easier to pack. The Urtasun Vibratory Belt then combines with the JBT Frigoscandia FLoFREEZE IQF Freezer to separate and individually quick freeze vegetables, fruits and berries to retain the products’ integrity, form and quality. The Frigoscandia FLoFREEZE IQF freezer uses pioneering fluidization technology in the field of individual quick freezing and can handle the most delicate high-end products with greatest care. “We have managed to bring different technologies together from different sectors so we can create a single processing line for individual freezing,” explains JBT’s Director of Sales for the EMEA region, Sergio Rabadan. “Thanks to integration of Urtasun with Frigoscandia and other

EMPOWER YOUR POULTRY FREEZING

JBT's innovative technologies are reshaping poultry processing

The pioneering Frigoscandia freezer range offers:

- ✓ the highest freezing standards in the industry
- ✓ superior freezing efficiency
- ✓ minimal energy consumption

With precise temperature and airflow control, our freezers ensure uniform freezing and maintaining product quality. Each freezer matched to a particular set of products and processing requirements.



Learn more
about how JBT
can empower your
poultry business at
[https://www.jbtc.com/
poultry-processing/](https://www.jbtc.com/poultry-processing/)





Photo: Key Technology

As demand for processed foods continues to grow, processors are looking to maximize production capacity on existing lines and install new lines capable of higher-than-ever throughput.

Jack Lee, Duravant Group president – Food Sorting and Handling Solutions

JBT businesses, we are now able to offer customers complete solutions whereas before customers would have to source certain systems from other providers. JBT understands the importance of capturing the freshness, taste, texture, appearance, and nutritional value. We also prioritize locking in peak freshness and nutritional value, so consumers can enjoy the best quality products every time.”

MORE FUNCTIONS EVEN AT HIGH CAPACITIES

Key Technology, part of the Duravant Group, has launched high-capacity vibrating conveyors for sophisticated food handling applications. These extra-large, high-capacity conveyors can transport up to 45,359 kg of product every hour and are available in widths of more than three meters. They can be designed for grading, aligning, distributing, and other specific food-handling duties. Key’s Iso-Flo, Impulse, Zephyr, and Marathon vibratory conveyors achieve new levels of adaptability at high throughputs while delivering industry-leading reliability, outstanding sanitation, and low maintenance requirements. “As demand for processed foods continues to grow, processors are looking to maximize production capacity on existing lines and install new lines capable of higher-than-ever throughputs,” according to Jack Lee, Duravant Group president – Food Sorting and Handling Solutions. “Key’s high-capacity conveyors support these objectives while helping processors streamline operations, reduce labor, and maximize profits. Our deep expertise in natural frequency, electromagnetic, and horizontal-motion food conveying makes Key Technology uniquely positioned to design and build these high-capacity systems. They require a sophisticated understanding of how various foods must be conveyed and the ability to customize each conveyor around the application requirements – not just any equipment

manufacturer can do this.” These high-capacity vibratory conveyors are ideal for potato strips, chips, snacks, and more. Key customizes the tune and stroke of each vibratory system to match the needs of the application so conveying performance is optimized. “Key’s specialized conveyor designs help facilitate more sophisticated functions even at high capacities, including grading, removing fines, dewatering, distributing and spreading product for sorters and other downstream equipment. The conveyor spring arms can be positioned either on the sides of the bed or underneath it. Drives can be positioned outside, inside, or even close to the center of the frame. The design and rigidity of the frame are also customized depending on the application. Each conveyor can be installed in a variety of different ways – suspended from overhead, supported from the floor, or mounted to other machinery,” according to a recent press release. Iso-Flo, Impulse, Zephyr, and Marathon conveyors are backed by Key’s industry-leading warranty, which ensures equipment reliability and reduces the processor’s total cost of ownership. Key supports its customers worldwide through an extensive sales network and a global service team.

A GLOBAL AFTERMARKET NETWORK

Earlier this year, Key Technology and PPM Technologies, both part of Duravant’s Food Sorting and Handling Solutions group, have integrated their customer service teams into Duravant Lifecycle Services. This global aftermarket network aims to enhance local services throughout the equipment lifecycle, from purchase to end-of-life replacement. The move is expected to help customers reduce costs, increase uptime, and improve equipment performance. Jack Lee, Duravant group president for Food Sorting and Handling Solutions, emphasized that this integration allows the companies to leverage their combined strengths to improve aftermarket offerings. Customers will retain access to familiar Key and PPM service teams while benefiting from expanded support and services globally. Duravant Lifecycle Services offers a comprehensive range of services, including installation, field services, equipment upgrades, preventative maintenance, technical support, remote monitoring, operator training, and parts sales. ●

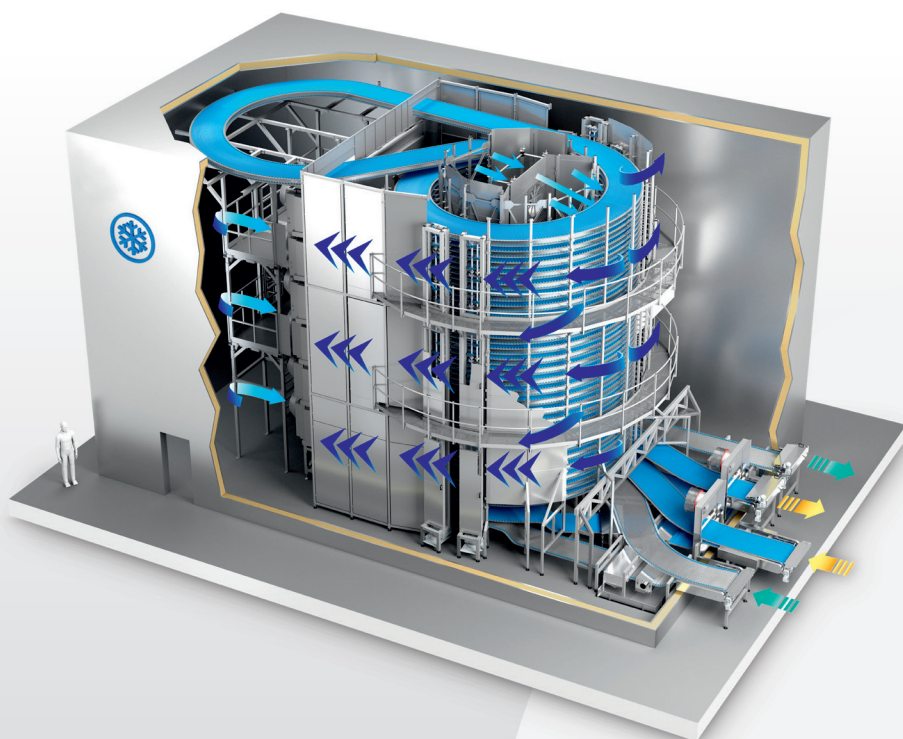


USD **100.5**bn
was the estimated value of the global
health ingredient market in 2022.




SPIRAL FREEZER built around your needs

Designed and manufactured
to fit into any production facility




 Energy savings

 Hygienic design for enhanced food safety

 Fast and ease maintenance

 Space saving

 Tailor made solutions

 Sequential defrosting for 24/7 continuous production

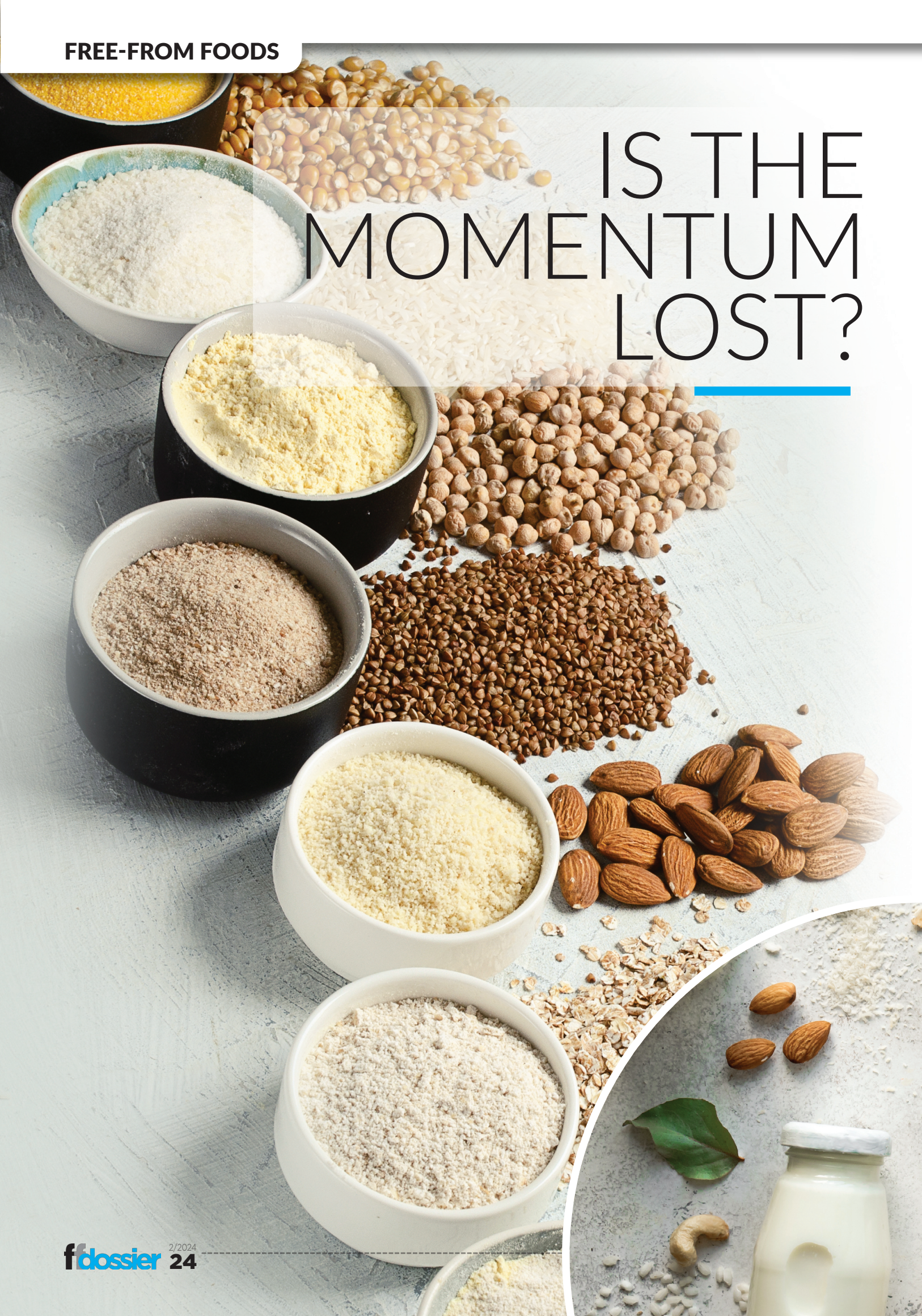


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IS THE MOMENTUM LOST?



As was the case with many other food categories, be it food or non-food, the plant-based one had to suffer due to inflation and rising costs of living. The reasons behind all those issues are well-known, so let's focus on the actual dynamic: global retail sales of plant-based meat in 2022 were USD6.1bn and grew from the prior year by both value sales (+8%) and weight sales (+5%), according to Euromonitor, with notable growth in Latin America and Europe in particular. Meanwhile, plant-based meat sales in US retail in 2022 declined slightly by 1% and unit sales declined 8% compared to the prior year, according to data from the Good Food Institute and the Plant Based Foods Association commissioned from SPINS.

B

While signs point to a stagnation of plant-based products in terms of sales, the free-from and better-for-you trends continue to have a major impact on the market. The health

ingredient market is expected to witness significant growth, recording a CAGR of 7.8% during the period starting from 2022 up to 2027. The market value was projected to reach USD146.3bn by 2027, while that for 2022 was estimated at USD100.5bn. This is highly attributed to increasing trends in personalized nutrition and nutrigenomics within the food industry, which are effective in enabling the development of need-based products for functional health purposes. The products range from immune health and digestive to mental health, beauty enhancement, and cardiovascular health, among others. Reasons include growth influenced by the increase in popularity of plant-based diets inspired by a mix of veganism, health awareness, and a growing number of animal welfare concerns. In fact, according to the 2021 Good Food Institute report, plant-based foods over the last three years have outpaced total foods in dollar sales

growth and unit sales growth. In particular, plant-based food sales have surged by 54%, whereas total food sales grew just by 2%. While the overall food unit sales remained flat, plant-based unit sales

increased by 6%, thereby driving retail growth in the health ingredients market. Food segment is expected to hold the highest share in different applications during the forecast period. Health ingredients are those intended to enhance nutritional value in the food products; they are ingredients that provide much healthier food options through functionality enhancement. Food ingredients are increasingly customized by their manufacturers to enhance nutrition for consumers with diverging nutritional needs, especially among those consumers who regularly exercise but have peculiar needs regarding proteins, carbohydrates, and vitamins in their diet. For instance, George Western Foods, a subsidiary of Associated British Foods based in the Asia-Pacific region, is fortifying omega-3 fatty acids into its baked products under its Tip Top brand. The health ingredients market is projected to rise at an above-average CAGR in the Asia-Pacific region during the next couple of years. This has, on one hand, caused rampant deficiency of vitamins and minerals among people while on the other it has opened fresh avenues for dietary supplement and functional food and beverage manufacturers to spread up their network in order to consolidate their leading positions in marketplace. Besides, chronic diseases such as diabetes, cardiovascular diseases, osteoporosis, and arthritis have also become endemic in this region, which is further mooting demand for health ingredients. With constant change in the health ingredient marketplace, one thing's for sure: consumer demands for healthier, easier, and tastier foods will continue to drive this marketplace.


What about new product development?

Food ingredients specialist Loryma has introduced a groundbreaking solution for crispy coatings, addressing the growing consumer demand for healthier, low-fat convenience products. This innovative product allows for the creation of reduced-fat items that can be easily prepared in an oven or air fryer, resulting in an appealing golden-brown finish. The versatility of Lory Crumb varieties enables





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Gluten-free
bread

manufacturers to produce a wide range of on-trend snacks, including bitterballen, chicken nuggets, vegetable patties, and plant-based meat alternatives. Available in medium and coarse granulations, the coating can be tailored to suit different substrates. One of the key advantages of Loryma's new solution is the elimination of the frying step for both producers and consumers. The advanced wheat-based crumbs ensure a satisfying crunch and strong coating adhesion, even during extended warming periods, making them particularly suitable for foodservice environments. For manufacturers, this innovation offers numerous benefits, including a more resource-efficient, sustainable, and cost-effective production process. Reduced oil usage, energy savings, and fewer cleaning requirements allow companies to streamline their operations while providing added value to consumers. This innovative coating solution represents a significant step forward in the convenience food sector, aligning with consumer preferences for healthier, easy-to-prepare options without compromising on taste or texture. A new vegan and gluten-free sausage has been added to Central Foods' line of free-from products for the food service industry. The KaterVeg! vegan and gluten-free VG sausage is prepared using the same recipe as the vegan meatballs, which are among Central Foods' best-selling items. The KaterVeg! VG sausage is a versatile product that can be added to any menu because it is made from soy and is low in sugar, high in fiber, and ideal for vegan and gluten-free eaters. The KaterVeg! VG sausages come frozen in packs of 40 and weigh 50g apiece. Central Foods' own brand, KaterVeg!, provides the catering industry with an extensive selection of plant-based and meatless goods. Most of them are also good for vegans, and an increasing number are good for coeliacs who need gluten-free options in addition to vegetarians. Fry Family Foods, an award-winning plant-based brand, has introduced their innovative Shape & Sizzle Mince to Tesco stores across the UK. Fry's Shape & Sizzle Mince will be available in the frozen plant-based

section. The product is 100% vegan, made from non-GMO soya, high in fiber, low in saturated fat, and protein-rich. The mince emerged as the top choice in a blind taste test involving over 100 plant-based consumers, outperforming other popular plant-based mince products in taste, texture, and appearance. revyve, B.V., a FoodTech innovator, introduces its latest gluten-free ingredient line derived from baker's yeast. This new egg substitute offers superior texturizing properties while remaining flavor and color neutral. This product launch will help revyve expand into additional food sectors, meeting the demand for clean-label, sustainable texturizing ingredients that can replace eggs, particularly in gluten-free products. Being allergen-free, this new ingredient allows for development in categories like sauces and potato products where gluten typically limits entry. Its neutral flavor profile also makes it suitable for flavor-sensitive items such as sweet baked goods and confectionery. Eggs are crucial texturizers and binders used in numerous food products. However, with growing focus on sustainability, animal welfare, and rising egg costs, the food industry is actively seeking clean-label, sustainable alternatives. revyve's yeast-based ingredients are highly adaptable, providing various texturizing functions including gelling, emulsifying, binding, and water retention. While revyve's original brewer's yeast-derived egg replacer contains trace amounts of gluten, this new baker's yeast-based product line addresses that limitation. Finally, Thrive Frozen Nutrition, Inc. has announced the launch of its innovative IDDSI 4 Gelato formula, enhancing its fortified food offerings with a thicker consistency designed for individuals requiring modified texture diets. This new formula adheres to the International Dysphagia Diet Standardisation Initiative (IDDSI) guidelines, ensuring precise thickness for those with swallowing difficulties. After two years of development, the IDDSI 4 Gelato is available in all beloved flavors—Vanilla, Chocolate, Butter Pecan, and Orange Crème—ensuring that nutrition does not compromise taste. ●

EDITORIAL PLAN 2024

1

JANUARY/FEBRUARY

ANUGA FOODTEC SPECIAL EDITION

Ad closing 26.01
Publishing 09.02

Frozen Pasta for Catering and Foodservice

product innovation, manufacturers, suppliers



Bakery and Pastry

key market players, producers, suppliers

Bio and Organic Products for the Food Industry

trends and innovations

Frozen Potato Market

innovative products and European overview

Frozen Potato Technology

sorting, peeling, cutting, slicing, dicing, PEF systems

Process and Packaging Technology

state-of-the-art equipment and solutions

Freezing Technology

conveyor belts, freezers and chillers, tunnel and spiral freezing systems

Transport & Logistics

developments, distribution, and cold storage

Artificial Intelligence

update on applications for automation & robotics

Nutrition & Ingredients

for frozen bakery and potato products

Frozen Food in Germany

recent developments, review, estimates

Trade fairs: ANUGA FOODTEC Cologne, INTERGASTRA Stuttgart, BIOFACH Nürnberg, GULFOOD Dubai, FOOD EX JAPAN, INTERNORGA Hamburg, CFIA Rennes, IFE London, FOOD EXPO Greece

2

MARCH/APRIL

PLMA, CIBUS SPECIAL EDITION

Ad closing 29.03
Publishing 12.04

Appetizers, Snacks and Pies

high convenience, filo pastry & pies, pizza & ready meals



Frozen Vegetables, Fruit, Mushrooms, Green Herbs

trends and market overview



Plant-based & Vegetarian Products

meat-free and protein substitutes

Technology Innovation for Frozen Vegetables & Fruit

sorting, peeling, cutting, slicing, dicing, PEF systems

BeNeLux Market Review

major players and new products

Cooked & Pre-Cooked IQF products for the Food Industry

rice, pasta, sauces, cereals, noodles, vegetables

Technology and Equipment

industrial freezing, freezers, coolers, proofers, ovens

Digitalization & Networking

smart solutions for the food industry

Frozen Desserts & Ice Cream Market in Europe

market dynamics & new product development

Frozen Fish & Seafood

sustainable practices, market overview, major processors

Nutrition & Ingredients

vegetables, fruit and herbs

Frozen Food in the UK

market overview

Trade fairs: PLMA Amsterdam, CIBUS Parma, SEAFOOD Processing GLOBAL Barcelona, FOOD & DRINK EXPO Birmingham

3

MAY/JUNE

Ad closing 24.05
Publishing 07.06

Frozen Food from Italy

market overview for retail and foodservice

Frozen Pasta & Noodles

trends, new product development, producers, suppliers

Frozen Pizza Market

major producers, suppliers, country breakdown

Technology and Innovation for Frozen Pizza

processing machines, toppings, portioning and forming

Ingredients for the Foodservice Industry

herbs & mixed herbs, rice, noodles, vegetables, processed meat, and sauces

Frozen Finger Food, Fried & Baked Products

trends and successful products

Frozen Burgers

new products, producers and suppliers

Frozen Snacks and Pastry

innovative products for retail and foodservice

Optical Sorting Technology

innovation and latest equipment

Deep Freezing Technologies, Proofing, Baking, Cooling

for bakery applications

Frozen Food in the US

evolution, challenges, opportunities & major players

Trade fairs: SNACKEX Stockholm, SUMMER FANCY FOOD SHOW

4

JULY/AUGUST

SIAL SPECIAL EDITION 1

Ad closing 26.07
Publishing 09.08

Coated/Breaded/Batter Foods

new products, market evolution



Ethnic Foods - Greek, Mexican, Italian, German, French & Asian Food

product trends, producers, markets overview

Potato Technology Innovation

new equipment for potato processing

Technology for the Frozen Food Industry

PEF systems

Potato Market Update

frozen fries market overview in retail & foodservice

Vegetarian and Vegan Food

product trends, innovations

Industrial Freezing Systems

latest equipment and technologies

Frozen Food in Spain and Portugal

latest market developments

Nutrition & Ingredients

trends for coated and breaded products

Trade fairs: SIAL Paris,

5

SEPTEMBER/OCTOBER

SIAL SPECIAL EDITION 2, INTERPOM

Ad closing 20.09
Publishing 04.10

Key Exhibitors Road Map and Event Agenda

SIAL Trends

special report



Bread, Bakery, and Pastry

sweet & salty products



Frozen Vegetables, Fruit, Mushrooms, Green Herbs

solutions for retail and foodservice

Technology Innovation for Frozen Vegetables and Fruit

sorting, peeling, cutting, slicing, dicing, PEF systems

Technology & Logistics

trends and solutions in packaging equipment

Blast Chilling and Shock Freezing

versatile applications between shock freezing and pasteurizing

Meat and Poultry Products

new technologies for product development

Frozen Food in France

key players, product innovation, suppliers

Global Retail Market

consumer behavior, new products, processors, suppliers

Nutrition & Ingredients

for pre-baked and ready to bake foods

Trade fairs: SIAL Paris, SÜDBACK Stuttgart, INTERPOM Kortrijk, PLMA Chicago, GULFOOD MANUFACTURING Dubai

6

NOVEMBER/DECEMBER

Ad closing 22.11
Publishing 06.12

Ready to bake & Pre-Baked Foods

market innovation, producers, new products

Convenience Food for Retail & Foodservice

European market evolution, category breakdown

Frozen Products for Catering & Foodservice

suppliers, producers, processors

Meat and Veggie Burgers

product development & trends

Freezing Technology

refrigerating and freezing equipment

Quick Service Restaurants & Bar and Snack Channel

leading operators in Europe and market evolution

Going Green

substantial contributions of equipment manufacturers

Nutrition & Ingredients

ethnic food innovation

Frozen Food in Scandinavia

producers, suppliers, consumer trends

European Retail Market

suppliers, major retail categories, food trends

Trade fairs: SIRHA Lyon 2025, MARCA Bologna 2025, FRUIT LOGISTICA Berlin 2025, GULFOOD Dubai 2025

FROZEN FOOD EUROPE



An omnichannel communication PLATFORM

Frozen Food Europe Magazine
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Weekly Newsletter
Frozen Food Dossier
Frozen Food E-blast

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