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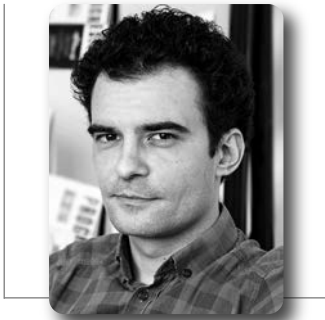
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Frozen Food Sales Surge in Spain and Portugal as Consumer Habits Thaw



By **Bogdan Angheluta**,
Editor in Chief



WHAT SHOULD WE FOCUS ON WHEN EDUCATING ABOUT THE BENEFITS OF FROZEN FOOD?

A new study from Nomad Foods, titled Frozen in Focus, reveals some interesting aspects of the way consumers perceive frozen foods today. As Nomad's research points out, almost two-thirds of European consumers - broadly speaking, as the survey includes more than 7,500 consumers across the UK, France, Germany, Italy, and Sweden - believe frozen food is just as nutritious as fresh food. In a smaller percentage (21%), these consumers understand that frozen can even be superior to fresh in some instances. What is surprising is that younger consumers, mainly those aged 18 to 24, have this perspective in much lower numbers. As such, just above a quarter of the respondents, 28%, believe frozen food is comparable to fresh food in terms of nutrients. So, is this an area that we should focus on? While not the most financially potent demographic, this group may have a massive influence on sales as their presence on social media is what usually drives a brand's visibility and even reputation. Making sure that younger consumers have a better understanding of all the benefits that frozen food brings might just be the key to unlocking better retail and foodservice performance for companies. Perhaps the most important finding of Nomad Foods' study, however, is the correlation between frozen food and sustainability.

Perhaps the most important finding of Nomad Foods' study, however, is the correlation between frozen food and sustainability. Nearly half of European consumers say they buy frozen food to reduce household food waste.

Nearly half of European consumers say they buy frozen food to reduce household food waste, according to the report, and in the UK, that percentage climbs to 59%. And in a region generating an estimated 59 million tons of food waste annually, that preference matters. One more part of the survey that I should point out is the one that details the inclusion of frozen food in daily meals: roughly 42% of European adults incorporate frozen foods into their meals two to four times a week, and nearly one in five use them more than five times weekly. Among those aged 25 to 34, 41% say they wish they had larger freezer space. All in all, Nomad Foods' report reveals a positive status for frozen, one that should only improve soon. Let me know what you think at bogdan.angheluta@trade.media ■

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NORTH AMERICA

CONAGRA BRANDS REPORTS Q4 RESULTS

Conagra Brands, Inc. reported its financial results for the fourth quarter and full fiscal year 2025, which concluded on May 25, 2025. The company faced a challenging environment marked by inflationary pressures, foreign exchange volatility, and supply constraints, all of which weighed on performance during the latter half of the year. In the fourth quarter, Conagra reported a 4.3% decline in net sales, while organic net sales fell 3.5%. The company's reported operating margin stood at 11.5%, with an adjusted operating margin of 13.8%.

US

NEW DURAVANT DIRECTOR OF PRODUCT MANAGEMENT

Duravant's Food Sorting and Handling Group has appointed Dean Ekkaia as Director of Product Management for its optical sorting solutions. In his new capacity, Ekkaia will oversee global initiatives supporting the development and commercialization of technologies designed to help food processors and packers improve product quality, enhance yield, and drive production efficiencies. Ekkaia joins Duravant with more than 15 years of experience in product management and leadership within the automation and food processing sectors.

EUROPE

63% OF EUROPEANS BELIEVE FROZEN FOOD IS AS NUTRITIOUS AS FRESH

In a period of surging food prices, rising climate anxiety, and increasingly time-starved lifestyles, Europe's frozen food market is going through a quiet but profound transformation. A new report from Nomad Foods, one of Europe's leading frozen food companies, suggests that the humble freezer is no longer just a household convenience. It is rapidly becoming a symbol of modern food resilience. The report, titled Frozen in Focus, surveys more than 7,500 consumers across the UK, France, Germany, Italy, and Sweden. It presents a sweeping reassessment of frozen food's role in everyday life - where perceptions of convenience, nutrition, and sustainability are converging to reshape consumer behavior. The European frozen food market, currently valued at EUR55bn, is poised for continued expansion as consumers increasingly opt for products that meet evolving demands for health, affordability, and environmental responsibility. At the heart of Nomad's thesis is a striking shift in perception. While 63% of Europeans now believe frozen food is as nutritious as fresh, only 21% understand that it can, in many cases, be superior. Flash freezing, especially of vegetables like peas, helps preserve nutrients that might otherwise



degrade during transport and storage. And yet, among younger consumers - particularly those aged 18 to 24 - skepticism remains. In Germany, only 28% of this cohort view frozen as nutritionally comparable to fresh. Still, practical realities are winning out. Roughly 42% of European adults incorporate frozen foods into their meals two to four times a week, and nearly one in five use them more than five times weekly. Among those aged 25 to 34, 41% say they wish they had larger freezer space - an indicator not just of growing demand, but of changing expectations around household infrastructure. Convenience, a long-standing benefit of frozen products, is being reframed as a tool for reclaiming time. Consumers across Europe cite frozen meals as a way to reduce trips to the supermarket, save up to an hour in food prep, and gain time for family, relaxation, or even catching up on TV.

GLOBAL

GCCA WELCOMES EU'S STOCKPILING STRATEGY

The Global Cold Chain Alliance (GCCA) has expressed cautious optimism over the European Commission's evolving strategy to stockpile

essential goods, viewing it as a crucial step toward enhancing resilience against future crises. Central to the strategy is a reinforced commitment to the European Food Supply Chain Mechanism (EFSCM), which serves as the coordinating body between the EU, member states, and industry

stakeholders. The plan also emphasizes deepening public-private partnerships and investing in real-time monitoring systems for European food supplies. Julie Hanson, Europe Director at GCCA, praised the Commission's initiative, stating, "We commend the Commission for including food in the future EU stockpiling strategy and for recognising the vital role of logistics in ensuring food security during times of disruption. This strategy lays the groundwork for much-needed cooperation between governments and food logistics operators."

GLOBAL

FROZEN DESSERTS MARKET TO HIT USD186BN

The global frozen desserts market is projected to reach USD186.2bn by 2034, up from USD115.4bn in 2024, according to new market data. That growth - representing a compound annual rate of 4.9% over the next decade - is being fueled by evolving consumer preferences that increasingly prioritize convenience, affordability, and novel flavor experiences. North America is expected to maintain its lead in the sector, accounting for more than 42% of global revenue in 2024.

GERMANY



ANUGA PARTNERS WITH ECOTROPHELIA EUROPE

Anuga, the world's largest trade fair for food and beverages, is reinforcing its role as a premier platform for innovation within the industry. In a continued partnership with Ecotrophelia Europe—widely regarded as Europe's most influential competition for sustainable food innovation—Anuga is set to spotlight emerging product concepts, entrepreneurial talent, and progressive business models. The collaboration will culminate in the European finals of Ecotrophelia, scheduled to take place on October 7 and 8, 2025, within the Congress Centre North in Cologne, as part of Anuga's five-day event. "For us, the partnership with Ecotrophelia Europe is a strategic pacesetter for the entire food industry. Together we are creating a platform where the highest level of sustainable innovation, young entrepreneurship and industrial networking come together," said Jan Philipp Hartmann, Director of Anuga.

THE NETHERLANDS

WESTFALIA FRUIT ACQUIRES DUTCH AVOCADO SPECIALIST GREENPOINT TRADING

Westfalia Fruit, a global leader in the avocado industry, has acquired Greenpoint Trading B.V., a Netherlands-based foodservice company known for its expertise in avocados and its popular Avojoy brand. The acquisition marks a strategic expansion of Westfalia Fruit's presence in Northern Europe and reinforces its commitment to the fast-growing foodservice sector. Greenpoint Trading has built a strong reputation across Northern Europe, supplying a wide network of foodservice clients and cultivating a longstanding partnership with Westfalia Fruit.

US

DEL MONTE FOODS FILES FOR BANKRUPTCY PROTECTION

Del Monte Foods, the nearly 140-year-old packaged-goods maker renowned for its canned fruits, vegetables and kitchen staples, has filed for Chapter 11 bankruptcy protection in US Bankruptcy Court. The company cited "a perfect storm" of excessive debt, eroding consumer demand and inflationary pressures that have weighed on margins over the past two years. Del Monte disclosed that it holds over USD1.23bn in long-term secured debt, a balance that ballooned after its 2014 acquisition by Singapore-listed Del Monte Pacific Ltd.



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ROMANIA

BETTY ICE EXPANDS ICE CREAM PRODUCTION

As temperatures rise, Romania's ice cream market is hitting its peak season, and Betty Ice, one of the country's leading producers, is ramping up production at full throttle. The company, part of The Magnum Ice Cream Company—Unilever's ice cream division now undergoing a global separation process—plans to surpass 20 million liters of ice cream annually at its Suceava facility. To meet the growing appetite, the company has committed more than EUR4m between 2024 and 2025 to upgrade its production line.

US

NATURAL CHOICE FOODS NAMES MARK FLEMING AS CEO

Natural Choice Foods has appointed Mark Fleming as its new President and Chief Executive Officer. The leadership change marks a new phase of strategic growth for the company, which specializes in value-driven food solutions through retail, private label, and contract manufacturing partnerships. Mr. Fleming brings three decades of experience in the consumer packaged goods industry, with a background spanning branded, private label, foodservice, and contract-manufactured product portfolios.

EUROPE

dti WELCOMES EU COUNCIL'S COMPROMISE ON SUSTAINABILITY AND SUPPLY CHAIN RULES

The German Frozen Food Institute (dti), the leading trade association representing the frozen food sector, has voiced strong support for the European Council's recently adopted negotiating position on proposed reforms to EU sustainability and supply chain regulations. The Council's stance—adopted under the Polish Presidency as part of the "Omnibus I" legislative package—aims to simplify both the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD), while balancing the twin priorities of sustainability and economic competitiveness. Sabine Eichner, Managing Director of the dti, welcomed the compromise, characterizing it as a long-needed step toward easing regulatory pressure on companies while reinforcing their role in advancing climate and social responsibility. "It is good that the EU Council under the Polish Presidency has now found a compromise that relieves the burden on companies and strengthens sustainability and competitiveness in equal measure. Our companies stand behind the goals of sustainable business. However, they urgently need planning security and



practicable framework conditions. This is the only way to invest in greater sustainability and to build sustainable reporting systems. It is crucial to create a reliable legal framework that takes into account the needs of SMEs," Eichner said. The dti expressed particular support for raising the company-size thresholds that determine which firms fall under the scope of the directives. According to the institute, this move will help protect small- and medium-sized enterprises (SMEs) from excessive administrative demands that could compromise their competitiveness. Additionally, the Council's emphasis on a risk-based approach to due diligence was welcomed as a pragmatic measure that mirrors established practices in food law, particularly those related to traceability. Limiting due diligence obligations to direct business partners, the dti argued, is both appropriate and effective, allowing companies to monitor supply chains efficiently without becoming mired in impractical compliance burdens.

GLOBAL



GLOBAL FROZEN FOODS MARKET TO REACH USD452.6BN

The global frozen foods market

is entering a new phase of growth, driven by changing consumer options toward convenience, nutrition, and culinary variety. Valued at USD311.1bn in 2025, the market is projected to expand to USD452.6bn by 2032, representing a compound annual growth rate of 5.5%, according to industry data by

Persistence Market Research. The surge reflects a broader transformation in how consumers around the world eat. As urbanization accelerates and dual-income households become the norm, frozen foods have emerged as a preferred solution for time-strapped individuals and families. Ready-to-eat meals in particular have become the market's standout category, appealing to working professionals and smaller households looking for fast, reliable meal options.

US

MISSION BARNs GETS USDA APPROVAL FOR CULTIVATED PORK FAT

Mission Barns, a California-based startup pioneering the cultivation of animal fat in proprietary bioreactors, has received final regulatory clearance from the US Department of Agriculture. The approval includes both a grant of inspection for its production facility and label authorization for its cultivated pork fat, which had previously gained a nod from the Food and Drug Administration earlier this year. With full US regulatory approval now secured, Mission Barns is set to launch its first products in the third quarter.

ITALY

SIGEP WORLD 2026 TO SPOTLIGHT GELATO, PASTRY, AND GLOBAL FOODSERVICE TRENDS



SIGEP World 2026, the global trade fair dedicated to artisanal foodservice excellence, will return to the Rimini Expo Centre from January 16 to 20, placing the spotlight on two of the most prestigious international competitions in the industry: the Gelato World Cup and the Juniores Pastry World Cup. The Gelato World Cup will bring together elite gelato artisans in what remains the only global contest of its kind. At the same time, the Juniores Pastry World Cup will showcase the next generation of pastry professionals, drawing talent from around the world. These headline events are part of a broader showcase that spans the full spectrum of gelato, pastry, chocolate, coffee, bakery, and pizza. Among the other key features of the 2026 edition is Pizza (R)evolution, a program aimed at exploring evolving synergies between

ingredients, technology, and consumer habits. Coffee will also take center stage with the Innovation Bar, an experiential concept that highlights new trends shaping the international coffee shop landscape. SIGEP World is organized by Italian Exhibition Group and serves as a leading platform for business, innovation, and education in the foodservice sector. The 2026 edition will highlight India as the official Guest Country, underscoring the growing relevance of Asian markets in global food trends. Corrado Peraboni, CEO of Italian Exhibition Group, noted the scale of the event's previous edition: "In 2025, the show hosted 1,300 exhibiting brands from 33 countries in 30 halls, welcoming an audience of professionals from 160 countries. For 2026, the internationalization strategy has been strengthened even further." That strategy includes a global roadshow, which will launch on November 6 at the Italian Embassy in Madrid, targeting the Spanish foodservice business community. Marco Carniello, Chief Business Officer at IEG, said the campaign aims to increase international outreach and engagement.

SOUTH AMERICA

BEM BRASIL BOOSTS COLD STORAGE CAPACITY WITH MECALUX AUTOMATION

Bem Brasil, the country's leading producer of pre-fried frozen potato chips, has significantly expanded its logistics infrastructure with the construction of two fully automated clad-rack warehouses at its Perdizes facility in Minas Gerais. Built in partnership with Mecalux, the new installations are designed to handle the storage and distribution of up to 500,000 tonnes of frozen food annually. The state-of-the-art facilities are outfitted with Mecalux's Automated Pallet Shuttle system and a stacker crane managed by the Easy WMS warehouse management system.

US

FERRERO TO ACQUIRE WK KELLOGG CO

Ferrero Group has announced a definitive agreement to acquire WK Kellogg Co for EUR2.87bn (USD3.1bn), bolstering its strategic expansion in the North American breakfast market. The all-cash deal, priced at USD23.00 per share, represents a 40% premium over WK Kellogg Co's 30-day volume weighted average trading price. The acquisition brings Ferrero ownership of a portfolio of iconic cereal brands, including Kellogg's Frosted Flakes, Special K, Froot Loops, and Rice Krispies, as well as better-for-you labels like Kashi and Bear Naked.

These will now sit alongside Ferrero's existing North American offerings, which include Nutella, Kinder, Keebler, and Blue Bunny. Giovanni Ferrero, Executive Chairman of the Ferrero Group, said the deal is "more than just an acquisition – it represents the coming together of two companies, each with a proud legacy and generations of loyal consumers."



US

APPLEGATE EXCEEDS REGENERATIVE AGRICULTURE GOALS

Applegate Farms, one of the country's leading natural and organic meat brands, has released its second annual Mission Report, offering a data-rich look into how the company is advancing its long-held commitment to "Changing The Meat We Eat." The 2024–2025 report outlines measurable progress across four core mission pillars: environmental sustainability, animal welfare, ingredient integrity and people. Among the most notable achievements, Applegate announced that it reached its regenerative agriculture target nine months ahead of schedule.

US

ALEXIS BRESCIA - CHIEF SUPPLY CHAIN OFFICER AT DR. PRAEGER'S

Dr. Praeger's has appointed Alexis Brescia as Chief Supply Chain Officer. The move signals a deepening focus on operational efficiency and growth as the brand continues to expand its presence in the frozen foods category. Dr. Praeger's is a portfolio company of private equity firm Vestar Capital Partners. "Alex brings an impressive track record of manufacturing and logistics leadership, and we are confident that he will be a huge asset for the team at Dr. Praeger's," said Andy Reichgut, Chief Executive Officer of Dr. Praeger's.



FROZEN CRUNCH, REMODELED

For an aisle that for decades relied on predictability, the world of breaded, coated and battered frozen foods has begun to transform. Over the past two years manufacturers, ingredient suppliers, and retailers have responded to shoppers who still prize ease but now demand shorter ingredient statements and sharper restaurant-style flavors and textures. This has driven coating science and packaging strategy to the center of product development.



The size of the global frozen category helps explain why. Grand View Research estimated the frozen food market at roughly USD504bn in 2024, with continued expansion projected through the end of the decade. At the same time, the market for food coating ingredients like flour, batters, crumbs and premixes was estimated at about USD5.18bn in 2024 and is forecast to grow as

manufacturers seek coatings that deliver longer shelf stability, improved crisp after baking and air-frying, and cleaner ingredient lists. What came next was strategy, as companies are repositioning classic SKUs while experimenting with new formulas. At TUTTOFOOD, **CGM** has presented the new packaging for its Cuocinorno Free From product line, targeting the growing demand for inclusive dining options in commercial

foodservice operations across bars, catering establishments, and fast-casual restaurants. The frozen food collection addresses dietary restrictions without compromising on traditional Italian flavors, offering gluten-free and lactose-free versions of popular appetizers and side dishes. The range includes stuffed Ascolana olives, arancini, croquettes, breaded mozzarella, mozzarella bites, and filled zucchini flowers, all designed with what the company describes as light and balanced recipes. The products require no oil for preparation and can be cooked using conventional ovens or air fryers, delivering what CGM promises will be consistently golden and crispy results. This approach simplifies kitchen operations for foodservice providers while expanding the menu options for customers with special dietary requirements. CGM positions the line as a practical solution that maintains quality standards while broadening the appeal of traditional Italian cuisine to health-conscious and dietary-restricted consumers. The Cuocinorno Free From range represents CGM's effort to combine convenience with inclusivity, allowing foodservice operators to offer authentic Italian flavors to a wider customer base through ready-to-cook frozen products. In late July 2025 **Tyson** introduced Simple Ingredient nuggets, a breaded chicken nugget that emphasizes shorter labels and

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claims 100% all-natural white meat and high protein per serving, presented in flavors intended to suit both oven and air-fryer preparation. The product launch illustrates that manufacturers are trying to preserve the familiar crunchy experience while simplifying what goes on with the ingredient panel. Smaller and newer brands are also using coatings to create interest. **Real Good Foods** recently launched lightly breaded, grain-free “Dino Nuggets,” a play that combines a novelty shape with a cleaner-label, high-protein positioning and wide retail rollouts at chains such as Walmart, HEB and Publix.

Conagra’s partnership with Dolly Parton, revealed in early spring 2025, expanded the celebrity’s existing line into frozen single-serve comfort meals that include a country-fried steak entrée noted for its crunchy coated finish. The Conagra release goes on to show that restaurant-style textures and regionally-inspired seasoning profiles are a primary focus for those developers who want frozen items to deliver both convenience and a sense of occasion. **Pork King Good** has also taken its pork-rind crumb technology into frozen retail with frozen chicken “puggets,” a pork-rind-crumbs-coated white-meat nugget pitched as low-carb and gluten-free. The product page and recent trade coverage position the launch as an extension of the snack brand’s retail footprint into frozen protein, offering an alternative crust for shoppers seeking reduced carbs and higher protein per serving. Also this year, **Young’s Seafood** introduced new flavor-packed breaded fish fillets aimed at rejuvenating the coated fish category, including garlic-and-herb and paprika-and-pepper variants and Indian-inspired formats under its Gastro brand. **Findus France** also rolled out a premium natural breaded fish range in early 2025 that the company described publicly as a push into “natural” and premium frozen seafood formats in that market.

NEW TECHNICAL DEMANDS

With protein types, suppliers are rethinking the technical demands placed on coatings. Engineering teams are working on multi-component

crust systems: adhesion layers that lock to moist proteins, flavor-embedded crumbs, and barrier layers designed to limit moisture migration during long cold chains. The goal is practical: coatings that arrive at the consumer are still attached and crisp after baking or air-frying, with controlled oil output and repeatable appearance. This seems to be the reason why ingredient companies and specialized premix makers describe coating formulations as a growth area within the frozen supply chain. Retailers are tuning assortments accordingly. National grocers are keeping economy nuggets and fish sticks for price-sensitive shoppers while simultaneously allocating shelf space for premium, short-label and novelty coated items that seek to drive trips and social-media attention. Private label teams, meanwhile, are increasingly investing in improved breading technology so value-priced SKUs can still perform acceptably in air fryers and ovens - a technical bar consumer now often expect. Those with knowledge point to the combination of convenience, flavor and perceived quality as the main point of interest for the next few years. For developers and retailers alike, the road ahead seems to be drawn: success requires coatings that survive distribution, labels that satisfy ingredient-conscious shoppers, and flavor profiles that read as authentic at home. The companies that can engineer that mix have a good chance of capturing repeat, everyday trips and the occasional premium purchase. And finally, companies that will not meet the technical or sensory bar risk seeing their coated products ignored as shoppers are trading or trying the growing number of alternatives.

COATING INNOVATIONS

A good example around technical innovations comes from food ingredients specialist **Loryma**, which in the latter part of last year introduced a groundbreaking solution for crispy coatings. The company’s new wheat-based Lory Crumb extrudates promise to revolutionize the breaded food industry by delivering a deliciously crunchy texture without the need for added

fat or deep-frying. 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 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. To further enhance the performance of these non-fry crumbs, Loryma recommends the inclusion of Lory Starch Opal. This cold-swelling starch functions as a wet batter, securing crumbs to the substrate without heat application. It forms a thin film that enhances the product’s crunchiness and, with additional dusting, further boosts crispness. As the snack industry increasingly focuses on products that offer enjoyment with added health benefits, Loryma’s Non-Fry options from the Lory Crumb range position manufacturers to effectively meet the challenge of creating breaded applications that are lower in fat and calories, yet full of flavor and natural appeal. ■



#

5.18

bn USD was the estimated value of the market for food coating ingredients (2024).





BALANCING INNOVATION WITH CONSUMER DEMAND

Global market data from Exactitude Consultancy shows the vegan frozen food segment was valued at roughly USD5BN in 2024 and on track to more than double by 2034, with Europe accounting for nearly a third of sales.



As Givaudan's recent research highlights, enthusiasm for plant-based meats has tempered after years of rapid expansion, with taste, texture, nutrition, and price now emerging as decisive factors. Industry leaders are responding with cleaner labels, technological innovation, and bolder product concepts. The latest figures from Exactitude Consultancy, published via GlobeNewswire in May, value the global vegan frozen food market at roughly USD5bn in 2024 and forecast it will reach about USD12bn by 2034. That trajectory represents a compound annual growth rate of 8.4% over the coming decade, a pace well ahead of the broader frozen category. The report attributes the rise to a mix of health consciousness, convenience and steady product innovation, along with wider e-commerce availability. Europe, Exactitude notes, accounts for roughly 30% of the global vegan frozen market, second only to North America's 40% share. While its projected growth rate of about 7% through 2034 is slower than emerging markets in Asia-Pacific and Latin America, the region's maturity and density of large national markets - particularly Germany and the UK - make it an attractive and competitive battleground for manufacturers. Within Europe, frozen meals remain the largest product segment, reflecting the same pattern as the global breakdown, which gives frozen meals roughly 30% of total category sales. Independent figures reinforce the importance of frozen formats to the plant-based category. The Good Food Institute, citing Euromonitor and SPINS/Circana retail data, reports that nearly 70% of plant-based meat and seafood sales in 2024 came from frozen products. That share underlines why many of the category's best-known launches, from plant-based nuggets to vegan breaded fish fillets, have targeted the frozen aisle first. Country-level numbers help illustrate the market's weight. GFI Europe's analysis of Circana data shows Germany's plant-based retail sector across six major categories reached approximately EUR1.68bn in 2024, with frozen items playing an outsize role in plant-based meat and seafood sales. Private-label affordability has also driven growth in markets like the Netherlands, Spain and the Nordic countries, as mainstream grocers have expanded their own vegan frozen lines alongside branded offerings. Exactitude's report lists familiar drivers - rising health awareness, improved sensory quality of plant-based coatings and fillings, and a more diverse distribution footprint - as key to sustaining the projected growth curve. But it also notes headwinds. Higher production costs, raw material supply constraints and uneven availability in some European regions remain constraints on faster adoption. For shoppers, that often translates into a price premium for vegan frozen products compared to conventional meat-based equivalents, though the gap has narrowed as more players enter the market.

GIVAUDAN: PLANT-BASED MEAT EYES A COMEBACK

After enjoying several years of accelerated growth, the European market for plant-based meats is undergoing a recalibration, according to a recent study by Givaudan. Sales volumes fell 3.4% in 2023 compared with 2022,

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according to Nielsen data, signaling a waning in the initial wave of enthusiasm. Yet demand remains far from extinguished. One in four European shoppers still includes meat alternatives in a typical grocery basket, reports Innova Market Insights. The sector has even shown early signs of recovery in 2024, posting a 2.3% increase in volume compared with the previous year. At the recent Bridge2Food 2025 summit in the Netherlands, Laurence Minisini, Senior Consumer & Market Insights Manager at Givaudan, presented a research-based perspective on five key trends reshaping the plant-based meat sector. These insights are drawn from proprietary studies conducted with more than 3,000 European consumers and 250 industry experts. "Health and nutrition are non-negotiable," Minisini said, emphasizing how today's consumers are closely evaluating the nutritional profile of meat alternatives. Although 54% of Europeans have sampled plant-based meat, Givaudan's research reveals that 12% have since stopped and another 17% have scaled back their consumption, frequently citing health concerns. Consumers are increasingly seeking clear labeling around protein content, fiber, calorie count and

12
bn USD is the projected value of the global vegan food market (2034).

additives. According to Givaudan, this points to a need for innovation that is not only science-backed but also transparently communicated. Taste and texture remain formidable barriers. A significant number of consumers - 32% across Europe - remain hesitant to try plant-based meat, often citing disappointing sensory experiences. "Enjoyment and novelty," Minisini noted, "are critical, just as they are in any other food category." Many current offerings fall short of replicating the tactile and flavor dimensions of animal protein. Consumers are looking for excitement and diversity - products such as tender pulled 'meat', savory 'pork' skewers or juicy 'chicken' wings that deliver more than just substitution.

Givaudan is responding to these challenges with a suite of technological initiatives. Efforts are underway to mask undesirable flavor notes, enhance mouthfeel, and replicate the cooking behavior of conventional meat. The company is also exploring emerging technologies like 3D printing and biotechnologies such as mycoproteins, algae-based ingredients, and cellular agriculture. These platforms offer novel textures and nutritional profiles, and may allow the development of whole cuts and hybrid products that expand the boundaries of what alternative protein can be. Beyond mimicry, a new consumer segment is gravitating toward products that are "Truly Not Meat" - bold, plant-forward foods designed not to imitate but to stand apart from traditional meat. "Truly Not Meat" has emerged as a distinct innovation track, especially appealing to adventurous flexitarians seeking flavor, originality, and sustainability. This trend was on full display during Givaudan's recent collaboration with Moonshot Pirates, a global youth innovation initiative. As part of the "Shape the Future Challenge" focused on alternative proteins, nearly 2,100 applications were submitted. The winning concept,



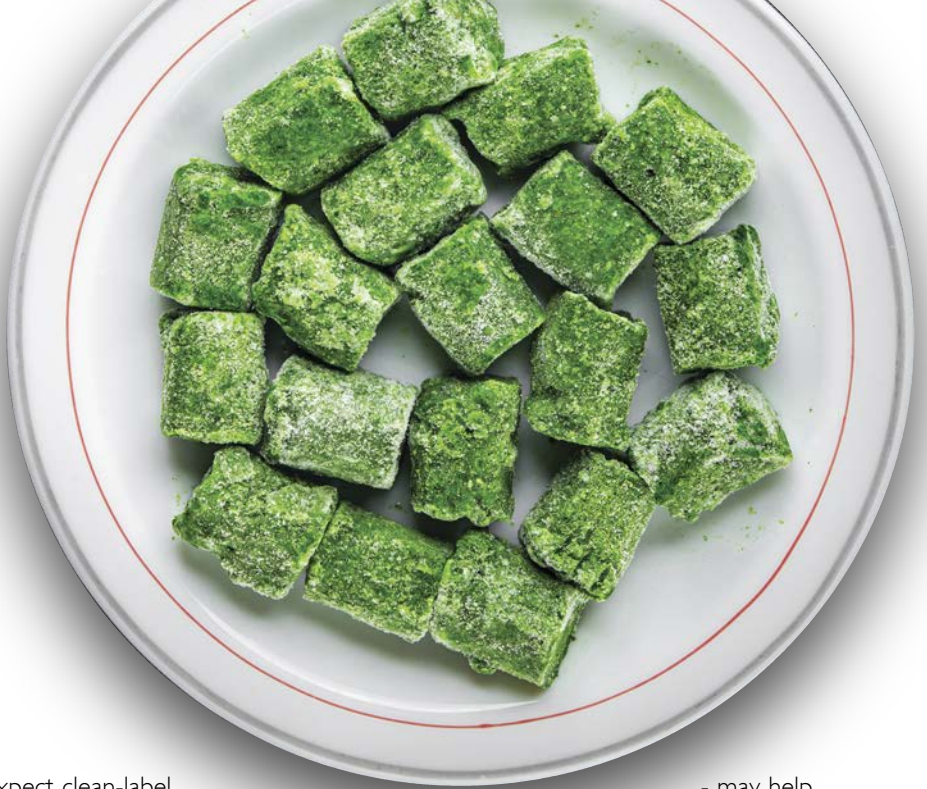
Valyncia, was developed by three sisters using microbial fermentation to produce a sweet, berry-based protein that doubles as a healthier alternative to both animal protein and sugar. Its low-impact production process and appealing flavor highlight the potential of inventive, non-traditional approaches to protein innovation. These evolving consumer preferences align with findings from Mintel, which indicate that flavor innovation remains a key purchase driver. Today's consumers are more willing than ever to explore new tastes, but they increasingly expect these to come with functional health benefits - without sacrificing indulgence. Affordability also plays a central role in the category's trajectory. With inflation pressuring household budgets across Europe, value perception is paramount. Givaudan's research suggests that consumers may accept a premium for plant-based products - but only if those products deliver across multiple dimensions: taste, nutrition, sustainability, convenience and experience. Recent data from McKinsey indicates a mixed outlook on the economy across Europe, with consumer optimism highest in Spain and most pessimism concentrated in France. In this context, any added cost must be backed by clear and meaningful value. Sustainability and transparency continue to shape consumer decision-making.

Givaudan's FlavourVision research identifies a growing emphasis on what it calls "Green for Me" - the desire for eco-conscious choices that are also personal and credible. Shoppers now

expect clean-label products that are natural, minimally processed and environmentally responsible. Yet many remain skeptical. Over-packaging and a lack of sourcing transparency are among the concerns casting doubt on whether today's plant-based meats are truly sustainable. These challenges also present a broader opportunity. As Givaudan's findings suggest, forging deeper connections between people and the foods they eat - anchored in enjoyment, health, and shared values

- may help resolve what is sometimes called the "meat paradox": the internal conflict between enjoying meat and recognizing its ethical and environmental toll. "To rekindle growth in the plant-based space, we need to shift from hype to substance," Minisini said. "That means delivering on taste, nutrition and sustainability - without compromise. And that only happens when the whole value chain works together. Givaudan continues to invest in innovation, co-creation with customers and technology platforms that are grounded in deep consumer insight." As the sector navigates a path forward, the winners are likely to be those who can deliver not just a substitute for meat, but a new and compelling food experience, according to the company. ■

8.4%
*is the estimated CAGR
for the global vegan food
market (2024 onwards).*





TECHNOLOGY FOR OPTIMIZED PERFORMANCE

From seafood to vegetables, freezing technologies have evolved beyond simple preservation methods to become key components of efficient supply chains and food security strategies. As innovation accelerates, industrial freezing is not just about keeping food cold - it's about optimizing freshness, texture, and value at scale.

ASHWORTH PRESENTED SEVERAL SOLUTIONS AT IFFA 2025 IN FRANKFURT, GERMANY

Ashworth Belts B.V., the industry pioneer, and leading conveyor belt manufacturer, has featured the PosiDrive Spiral System at IFFA 2025 in Frankfurt, Germany. The PosiDrive Spiral features a unique cage design that maintains product orientation, disorientation, lowers belt tension, and increases production capacity.



Photo: Ashworth



YOUR CHALLENGE IS OUR **PRIORITY** BELTING SOLUTIONS FROM THE EXPERTS

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POSIDRIVE SPIRAL®

Maintains consistent belt tensions between sanitation cycles.

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Flexible belt stackers that deliver cost-effective, high quality food processing solutions.

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Call on Ashworth Factory Service experts for installation, troubleshooting, and maintenance of your belting system.



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Attendees of IFFA were able to view various metal and plastic conveyor belt solutions at Messe Frankfurt. "The Ashworth PosiDrive Spiral is all about maintaining product orientation and preventing product movement without impacting downstream processes which in turn, saves you time and money!" said Jonathan Lasecki, Engineering Director for Ashworth. The positive drive concept of the PosiDrive Spiral keeps belt tensions low - which helps to increase belt life throughout sanitizing cycles and allows for increased product load capacity. A perfect solution for oily products, the PosiDrive Spiral system is designed for processing both heavy and lightweight foods and ideal for retrofitting existing proofing, cooling, and freezing spiral applications. The PosiDrive Spiral is ideal for retrofitting existing proofing, cooling, and freezing spiral applications. "Offering a product that gives you the ability to seamlessly retrofit your current system combined with Ashworth's own Factory Service spiral experts is the perfect combination for any business looking to maximize their equipment efficiency," added Lasecki. "Simply put, we provide a simplified solution to help your business succeed." Ashworth, a global company, is the only conveyor belt company that manufactures and services both metal and plastic belting for straight running, turn-curve, lo-tension, Posi-Drive and self-stacking spirals - offering customers the best solution for their specific requirements. Ashworth Factory Service offers a full range of engineering services, including system refurbishment, troubleshooting, belt installation, and system maintenance.

THE HEAVY-DUTY SMALL RADIUS OMNI-GRID 360 WELD

Also at IFFA, Ashworth presented the Small Radius Omni-Grid 360 Weld, the first of its kind. It's the highest tension rated belt in the small radius belt market. "Ashworth's Heavy-Duty Small Radius Omni-Grid 360 Weld is small, but mighty with a tension rating of 400 pounds," said Jonathan Lasecki. "Combined with its patented zero-tension, 360 buttonless weld it offers improved durability, additional

strength, is easy to clean and can increase belt life." The Small Radius Heavy Duty Omni-Grid 360 Weld is made up of strong rods and links, designed for durability. The center row of heavy-duty links creates two lanes for products, with sturdy, heavy duty collapsing links on the inside edge and heavy-duty collapsing bar links on the outside edge. Every link offers a secure single weld. According to Lasecki, with 360-degree welds, the heavy-duty links provide extra strength making the belt ideal for spiral, low-tension, and turn-curve applications. "The Small Radius Heavy-Duty Omni-Grid 360 Weld is available with a turn ratio ranging from 1.0 to 1.59 times the belt width. Ideal for use in applications where heavy product loads or floor space is limited, the Small Radius Heavy-Duty Omni-Grid can turn either left or right, pivoting about a center link," he added.

THE EXACTASTACK

Ashworth Belts B.V. has also presented at IFFA the ExactaStack Stacker Solution. The ExactaStack is an affordable belt option for those who need a cost-effective, high quality food processing solution. "The ExactaStack is available in all widths, tier heights, and mesh configurations for both splice-in sections and complete belt replacements, with no system drive modifications required," said Jonathan Lasecki. For spiral or straight-run use, the ExactaStack is engineered to minimize product damage. The ExactaStack is ideal as a drop-in replacement for smoking, cooking, cooling, and freezing applications. "Offering a product that

gives you the ability to seamlessly retrofit your current system combined with Ashworth's own Factory Service experts is the perfect combination for any business looking to maximize their equipment efficiency," added Lasecki. "With Ashworth's Factory Service there's no mandatory service contract and you reap the benefits of technical support from the experts who invented spiral belting systems. Simply put, we provide a simplified solution to help your business succeed!"

NOBLE FOODS TAPS STARFROST TECHNOLOGY TO EXPAND INTO FROZEN CONVENIENCE MEALS

Noble Foods, best known for its flagship brand the happy egg co., is venturing into the fast-growing market for pre-prepared meals with a new line of frozen, ready-to-cook omelettes. The move is part of a broader push to capitalize on consumer demand for convenient, nutritious foods that fit into increasingly fast-paced lifestyles. To support its expansion, Noble has partnered with UK-based cooling technology firm **Starfrost**, installing two of the company's Helix Spiral Freezers at its innovation and manufacturing site. The high-performance freezing systems are enabling Noble to maintain tight control over product quality while ramping up production at scale. "We've always taken pride in delivering high-quality, egg products, and we're seeing increasing demand for more convenient, nutritious and



Photo: Ashworth



protein-rich options that suit today's fast-paced lifestyles," said Pete Robertson, Project and Engineering Manager at Noble Foods. "Moving into the pre-prepared food space was a natural progression. Here at our innovation and manufacturing site, our first products off the production line are frozen omelettes by the happy egg co., which is part of our new value-added pipeline." The entry into the convenience segment marks a new chapter for Noble, which had not previously used automated freezing systems. After assessing its needs, the company opted for mechanical freezing over cryogenic systems, citing long-term cost efficiency and operational reliability. "We hadn't used automated freezing or chilling systems before, so we wanted to pursue the best options for our ambition," said Robertson. "We knew we needed a system that would give us flexibility, reliability and efficiency. We found Starfrost to be a trusted name in the industry. Their equipment stood out for its durability, ease of use and the company's commitment to long-term relationships and aftercare. That was

crucial for us. The Helix Spiral Freezer ticked all the boxes." Although Noble initially considered liquid nitrogen technology, the economics and logistics of cryogenic freezing ultimately proved less practical. "We considered liquid nitrogen initially, but the costs and supply logistics made it less viable," said Robertson. "Cryogenic freezing comes with volatile pricing and complex transport considerations, whereas mechanical freezing offered more stability and lower long-term costs. After in-depth discussions with Starfrost, we were confident their mechanical freezing systems could achieve the same high-quality results with greater consistency." The performance of the spiral freezers has already begun to pay dividends in terms of product consistency and operational flexibility, according to Robertson. "The biggest win has been consistency," he said. "The freezing process is extremely reliable, which ensures our product quality remains high. From an engineering standpoint, the system is intuitive and straightforward to operate, and it performs well under different production conditions. It's

also versatile - we can seamlessly switch between products or recipes, which gives us the flexibility we need as our added-value businesses grows." Looking ahead, Noble sees its partnership with Starfrost as a foundation for continued growth in the value-added food sector. The Helix Spiral Freezer's scalability, Robertson said, is already shaping the company's plans for expansion. "This partnership with Starfrost is just the beginning," he said. "As our business grows, we'll need equipment that evolves with us. Starfrost's freezer systems provide that scalability. The Helix Spiral Freezer is future-proof - designed to handle greater capacity and accommodate alternative products as production ramps up. We're excited for what the future holds, knowing we have Starfrost's ongoing support." As Noble Foods steps into the convenience food space, the decision to invest in scalable, high-performance freezing systems underscores a wider trend across the industry: adapting traditional brands to meet modern demands, without compromising on quality or reliability. ■



“IT’S PART OF OUR DNA TO SUPPLY ALL THE PRODUCTS FROM ONE SOURCE”

Ebrofrost is a medium-sized, owner-led company and part of the Spanish Ebro Foods Group. At its three sites (Denmark, Germany and Great Britain), the company produces cooked and frozen pasta, Asian noodles, rice, lentils and grain products, all according to customer-specific recipes. Its customers are manufacturers of ready meals (branded and private label products) and food service businesses, predominantly in system catering.

Currently, there are extensive plans for a large-scale expansion of the site in Germany. The company currently operates eight process lines and has a total capacity of 90,000 tonnes per year. The plans will increase the Group’s output by an additional 45,000 tonnes per year. **Stephan Keck, CEO**, explains the background to this major investment.

Mr Keck, you are currently investing in your German site in a new plant for frozen pasta, noodle nests and rice. What capacity will this give you in the future?

The new plant will give us an additional capacity of 45,000 tonnes a year. This will enable us to manufacture 70,000 tonnes of frozen products in Germany annually. With another two sites in Denmark and Great Britain, we will be able to produce 135,000 tonnes a year in total.

Where do you store your production? Do you outsource warehousing?

Not at all. We keep everything under our management and are building a second fully automated high-bay warehouse with the new plant.

Major investments like this are unusual in the present economic climate. Will you be able to make full use of this capacity?

We are certain we can. In the past, we have grown organically at a rate of 4,000 to 5,000 tonnes a year.

What makes you so certain that you can maintain this growth?

There are two main reasons. During the pandemic, many customers temporarily stopped new projects that used our ingredients. Since the end of 2023, they are bringing these to the market and achieving further sales in food retail with their innovations. At the same time, the demand from “eating outside the home” is showing a markedly upbeat trend. There’s a shortage of skilled workers in many European countries, which is pushing the sales of our pasta because cooks can regenerate it ready for consumption in just a few seconds.

Nevertheless, 45,000 tonnes of extra capacity is a statement, even for the large European market.

Well, as we frequently develop and manufacture products for our customers that are tailored to their specific requirements, we are continuously opening up new markets beyond the conventional frozen foods market. For example, in the past few

years we developed special frozen pasta for manufacturers of fresh, chilled salads – a milestone, particularly from a microbiological perspective. Before then, we hadn’t had an entry point to this strong-selling market.

How long does this kind of customised development process take?

About 18, sometimes even 24 months. And then another two to three years until the planned volume of sales is reached. This lead time means we can plan quite reliably.





Once our new plant starts operation, we will know relatively precisely which products we will be producing in four to five years and what kind of volumes. This gives us a relatively high level of planning certainty.

Can you tell us what this kind of development process looks like in more detail?

These types of projects are taken care of our executive management. When we receive an enquiry, we first clarify the remit in person or on a video call. Then we look into the technical details such as the further processing and handling at our customer's site, the regeneration and preparation of the ready meal by the consumer, the required best before date etc. There are also other important considerations such as the filling and packaging process. Each of these parameters can affect the recipe of the product that Ebrofrost should develop.

Is this not confidential information that those outside the business would consider to be company secrets?

Yes, that's correct. Looking from the outside you may be surprised that our customers share this kind of information with us at such an early stage. Complete transparency on their side, absolute discretion on ours – that's been the way we've worked for 20 years, it's give and take. This is the only way we can all reach a solution at a reasonable cost.

How do you handle purchase orders for small volumes? Can you and do you want to supply these?

Yes and yes. It's part of our DNA to supply all the products our customers need from one source, and to do so at fair prices even if we sometimes have to make certain concessions.

Why do you take a different stance to this than many of your competitors?

The customer relationship as a whole and over its lifetime is important to us. We have almost no customer turnover and grow both with our existing customers and with new partners.

How diverse is your customer base?

I don't wish to quantify that here. But I can say that we are diversified and not dependent upon anyone. Our biggest customer represents less than ten percent of our sales.

How do you handle energy? Your energy requirement for two plants and high-bay warehouses must be very high.

That's true. There are three specific challenges we always have to consider: We need to secure our energy supply in the long term and keep costs stable. However, we also need to reduce our water consumption and carbon footprint as much as possible to keep our environmental impact as low as it can be. Since 2015 we have been permanently reducing our energy needs and increasing the rate of recovery of our thermal energy.

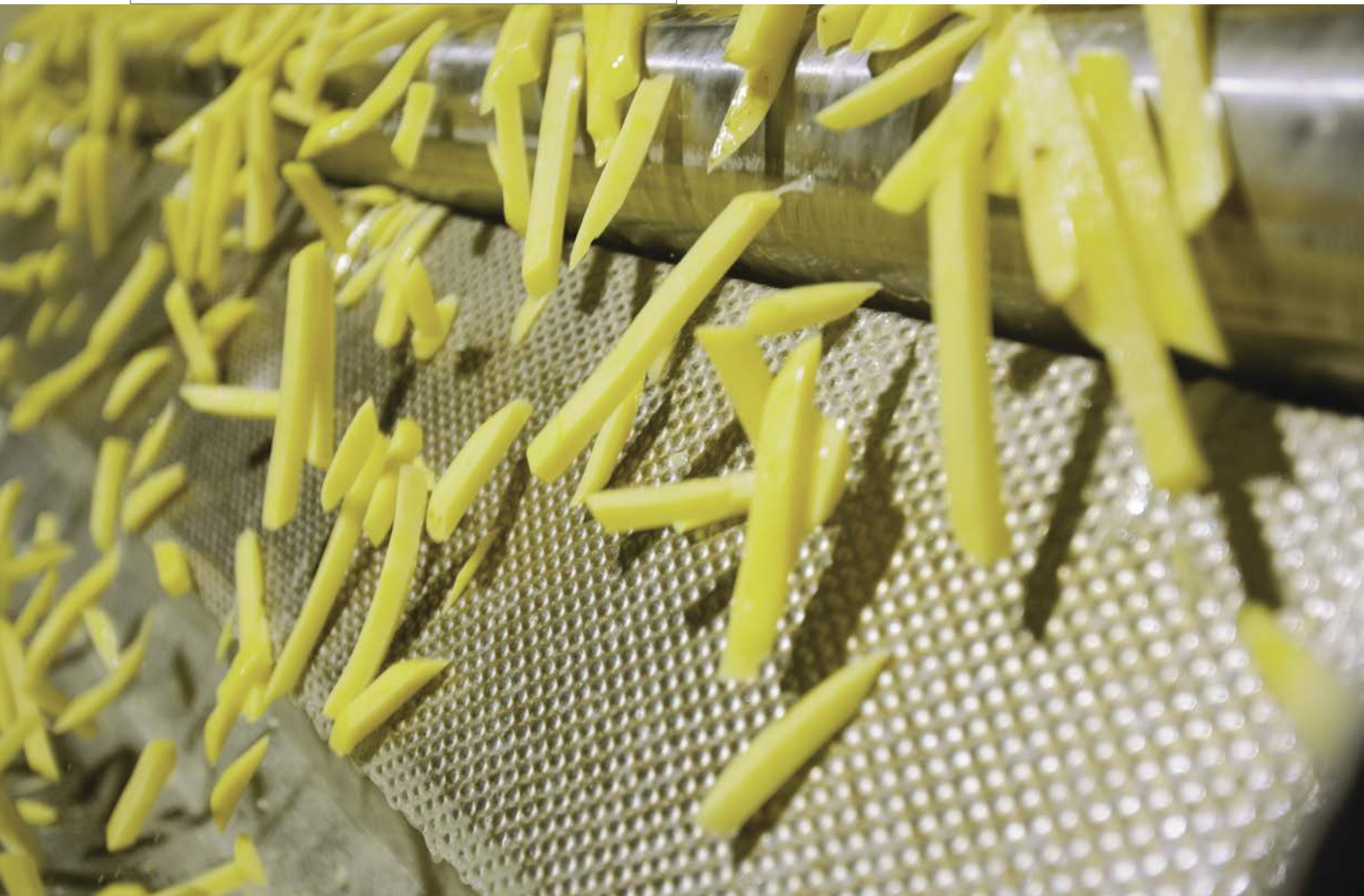
How successful has this been so far, how do you plan to manage in the future?

We are focussing on two areas related to energy – primary energy supply (electricity, natural gas) and recovering heat from production. In 2017, we invested in our own 1,200 kW combined heat and power unit with the goal of becoming as self-sufficient as possible when it comes to energy. Recently, we installed geothermal heat pumps, which operate using ground source heat.

We use natural gas to generate the process heat, steam, in our production. In future, we will replace part of this with biogas, which we will generate in our own wastewater treatment and biogas plant on the works site – a partial investment of three million euros. This will use the organic matter in the wastewater as well as our pasta dough and noodle scraps from both plants and turn it into energy. It will take more than ten years to start paying off. If we are using 60–70 % of the plant's capacity in 5 to 6 years, we could potentially replace natural gas with energy from a large wood gasification power plant.

Are there any other CO₂-relevant topics?

As well as these major investments we are converting our fleet of cars to largely electric vehicles and have installed ten charging stations with this in mind. Another area is the amount of production waste, which we have recently cut by 22%. ■



DRIVING PRECISION IN POTATO PROCESSING

As consumer expectations evolve and processors face mounting pressure to deliver higher yields, lower waste, and more variety, potato processing equipment manufacturers are pushing innovation to new heights. From cutting and peeling to sorting and optimizing line performance, companies like Urschel, FAM STUMABO, Vanmark, and Key Technology are engineering smarter, more adaptable solutions. Leading equipment providers are combining deep industry expertise with cutting-edge technologies - from AI-driven sorting to modular cutting units and advanced sanitation designs - to help processors meet production demands with greater precision, uptime, and flexibility.

Nut Processing Solutions



Successful processors rely on Urschel reduction equipment for all types of nuts and seeds.

From the CC Slicer and N Granulator to the new Comitrol® Disc Mill 380 (DM380), Urschel delivers ideal reduction solutions. Pair the DM380 with the Comitrol® Processor Model 1700 for ultra smooth nut butters.

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URSCHEL®
The Global Leader in Food Cutting Technology

Urschel potato cutting equipment technological innovations are both simple and complex, according to Alan Major, Chief Sales Officer, Urschel. The company's machinery is simple to operate because of the complexity Urschel has mastered throughout the production process. The complexity, seemingly simple, to keep the tightest part tolerances to deliver the highest precision, cut after cut, from the first cut to the many thousands that follow. "From a computerized drawing to refining parts through R&D, to our foundries, and every step of manufacturing and development along the way, Urschel is continuously working toward improving on our solid track record," he says. By constantly evolving in engineering, creativity, and honing cell manufacturing and implementing the newest technology in our production plant, Urschel continues to successfully partner with food processors around the globe. Urschel invests in manufacturing, engineering, and extensive infrastructure across the globe to make sure our network of sales and service are available where our customers are located to fully assist them with their food processing goals. Founded in 1910 by inventor William Urschel, we embrace that inventive spirit as part of our company culture and continue to grow alongside the dynamic food processing industry." Urschel maintains manufacturing and engineering under one roof. With this capability, the company is able to map out new parts, such as knives, and constantly focuses on addressing specific cutting applications. "While Urschel is now over 530,000 square feet at our headquarters, we also support an offsite Urschel facility, the Urschel Innovation & Development (I&D) Center. The I&D Center supplies new approaches to cutting with fresh perspectives from which future ideas will grow."

THE HIGHEST PRECISION, CUT AFTER CUT

When talking about the manufacturers' need to upgrade existing infrastructure and machinery, Alan Major points out that capital

From a computerized drawing to refining parts through R&D, to our foundries, and every step of manufacturing and development along the way, Urschel is continuously working toward improving on our solid track record.

Alan Major, Chief Sales Officer, Urschel



equipment is expensive. "This is a planned budgetary expense at companies that takes a lengthy time period to implement, sometimes years. Food processors actively invest in capital equipment when they make a purchase. Companies know an Urschel purchase will be backed by solid, dependable service for the long life of their machine." That is why Urschel builds cutting machinery to last. The company introduces new cutting machinery by working with processors to make sure new cutting methods, knives, and ease of operation will fulfill their production line needs. Urschel is also known or constantly adding more flexibility for existing Urschel machinery already in the field, such as additional shapes, cut sizes, heavy-duty options, built-in conveyors, new knives to process different product applications, and many others. Many times, an Urschel machine may be switched over in the field to upgrade to the latest Urschel technology, or new parts to expand on the Urschel cutting machine may

be purchased to increase a food processor's SKU capability. "Before making any capital purchase, the food processor should have a full understanding of how his line currently works," he adds. "Every station in a line should work smoothly. If a processor is looking into a new purchase, he needs to realize the impact the new equipment may have up or down stream in the overall line. A thorough approach as to what other stations may need to be replaced or how each station may be affected, negatively or positively. For example, if you upgrade to a faster Urschel slicer, will your existing fryers be able to keep pace. One investment may lead to a few more." Additionally, Urschel cutting machinery is designed with sanitation and for simple, routine maintenance. The mechanical zone is completely separate from the food zone to prevent any cross contamination. Stainless steel construction is evident throughout. Urschel engineered surfaces are angled or rounded to

promote fast washdown procedures and inhibit bacterial growth. Swingaway hoppers provide full access to facilitate sanitation. Assemblies may be completely disassembled for thorough cleaning. MicroAdjustable Slicing and Shredding Heads with SlideLocc Technology expedite changeovers and assembly/reassembly of complete heads. In some cases, little to no tools are needed due to the special construction of the heads. In other cases, tools, engineered by Urschel, accompany machines. Urschel specially pairs to ease different maintenance and sanitation procedures. Urschel components have built-in handles. Wheel resting hubs and other built-ins offer ease of use for the operator. Quick release changeover of belts is featured on many machines. With the ongoing labor shortage, Urschel machines are ruggedly designed to promote limited operator involvement and uninterrupted production. Regarding demand, it is the mass consumer markets and leading potato processors around the world that drive it, Alan Major explains. "For example, in the US demand for advanced potato processing equipment is fueled by consumer expectations and the competitive environment. Potatoes are so versatile. Many fast-food restaurants look for a signature offering to set their brand apart from others. For example, waffle fries, steak fries, or extra deep crinkle chips/crisps or fries. The new Urschel CCLL Slicer and DiversaCut Series are examples of machines processors are incorporating." Another growing market is the value-added sector, limited wasted product which leads to increased profit. Many processors incorporate the Comitrol Processor Line to create flake cuts for a wide range of potato products such as hashbrowns, tator tots, and others. The new Comitrol Processor 3640A



is an example of machines processors rely on for flake cutting, value-added SKUs.

MACHINES SPECIALLY DESIGNED FOR POTATO CUTTING

The SureTec 240P is a reliable French fry cutter and dicer which delivers top-quality products while running at the highest capacities, according to Bjorn Thumas, Business Development Director at **FAM STUMABO**. "The 'P' in the product name signifies a machine specially designed for potato cutting, delivering clean and accurate cuts, maximised length and minimised breakage and feathering. The specially designed infeed guides the potato into the drum at the perfect orientation, maximising both output and fry length," he explains. The machine features the unique concept of the SureCut unit (SCU), specifically designed to tackle the challenges within a potato processing facility and ensure consistency of production from the first potato that's being cut

till the last going through the production line. Further advantages of the machine, according to Bjorn Thumas, are the slipper clutch and slip detection system that will avoid expensive downtimes and prevent the parts from severe damage or wear due to foreign objects. The hinged electrical cabinet guarantees faster access to the drive area. "The 240 mm wide drum is an essential requirement if long potatoes are to be cut at full length. A variety of impellers with a different number of paddles are available to suit different size products and to align them properly. It's designed for heavy duty and therefore a perfect fit for the potato processors running 3 shifts a day, 7 days a week all year long. To maximize uptime, its hygienic design allows for ease of access and cleanability, reducing the cleaning cycle to the bare minimum," he adds. So, what benefits does the preassembled SureCut Unit (SCU) offer for processors working with frozen potato products compared to

The SureCut Unit (SCU) allows the cutting components to be pre-assembled in one piece and with a preset cut size. The assembly can be carried out in the workplace, away from the production area.
Bjorn Thumas, Business Development Director at FAM STUMABO



Photos: FAM STUMABO

more traditional cutting setups? “The SureCut Unit (SCU) allows the cutting components to be pre-assembled in one piece and with a preset cut size. The assembly can be carried out in the workplace, away from the production area,” Bjorn Thumas says. This allows the operator to prepare different sets up front pending on the production schedule, reducing the complexity at the machine. In one shift, all prep-work can be done reducing the need for experts to be present on all shifts. According to him, even if a crash occurs and initial diagnosis of the damage warrants replacement, the spare set is already at hand and downtime and stress level decreased significantly. “The SureCut Unit is set up with the desired slice thickness and appropriate diameter feedstars to aid product flow to the crosscut knives, where the fry is produced. The SCU allows even non-technically trained operators to install the cutting tools on the machine in a very fast,

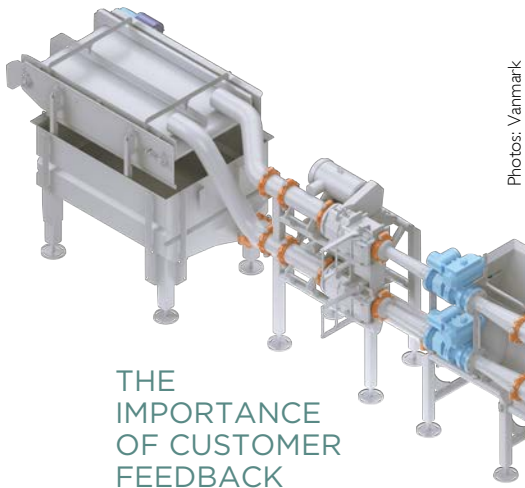
uncomplicated and error-free manner. As a result, this concept assures cutting accuracy from the very first moment of every new production run, maximizing production uptime.” Because human error is reduced, food waste and rework are also significantly limited, contributing to more efficient production. Additionally, ease of use plays a key role: many processors face challenges with operator retention and training. By simplifying the process, the SureCut Unit supports teams with various skill levels and helps make the machine part of the solution, not the problem.

A PROVEN SETUP

Simpler than other systems, when using the SureTec 240P, operators can fall back on a proven setup that works for a particular cut or potato texture, the FAM STUMABO Business Development Director explains. The use of the SureCut Unit (SCU) allows simple, and repeatable adjustment of

the cutting tools. Whereas previously the disc thickness had to be adjusted mostly by feel, one can now pre-configure the SCU according to product specifications. “In most high-capacity lines for frozen potato products, the potatoes will be steam-peeled. Other factors that influence potato texture include the level of PEF applied, the potato variety, as well as seasonality - such as fresh harvest potatoes versus storage potatoes. The SureTec 240P is designed to remain stable and effective despite these variations.” The inlet and outlet of the machine, the impeller and the construction of the cutting tools are provided for maximum product guidance to ensure cutting quality at high capacities. Recently, FAM STUMABO designed a new infeed hopper that caters to larger variations in product size, as we often see with sweet potato. In the production process, the amount of water feed can be played with to flush any starch deposits and/or prevent peel build-up.





Photos: Vanmark

Vanmark will soon announce its new Helix Hydrocutting System, a system designed for cutting curly fries. Designed to help producers achieve high volume with maximum cut results and yield, the system utilizes twin cutting heads in a stacked configuration that allows for increased throughput, a single point of access to the cutter heads, and a moderate footprint.

Vanmark

THE IMPORTANCE OF CUSTOMER FEEDBACK

"At FAM STUMABO, customer feedback isn't just appreciated - it's essential," says Bjorn Thumas. "Everything we develop is shaped by real conversations with processors, line builders, and industry partners around the world. When it comes to French fries, no two operations are the same. That's why we listen closely to what our customers need - whether it's higher capacity, lower cost, improved yield, or reduced processing time - and we build those insights directly into our equipment. Some of our innovations were born from direct processor input. Take our Conibot hydrocutting technology: processors told us they were facing challenges with sprouting potatoes, so we designed a blade that maintains superior cut quality even under those tough conditions. Look at our 'P' series impeller and infeed system - developed hand-in-hand with customers to ensure proper orientation, minimal feathering, and maximum yield. These features didn't come from guesswork; they came from the processing floor, where performance matters most. Our engineers prefer to experience the day-to-day hurdles on the processing floor rather than working from an 'ivory tower' - they get their hands dirty to understand what really matters to our customers." FAM STUMABO is investing in its production infrastructure to enhance its output of key components. In response to increasing global demand and longer lead times for some components, the company is actively increasing capacity through the purchase and installation of new production equipment, laying the groundwork for improved service and



long-term supply reliability. FAM STUMABO is strengthening its international presence with new facilities in Spain, Germany, and the United States. The expansion reflects FAM STUMABO's continued investment in customer proximity, local service excellence, and strategic independence - particularly in North America, where the company has strengthened its direct presence.

DESIGNED TO MINIMIZE PRODUCT LOSS

Vanmark makes peeling equipment for all potato product formats. It also offers cutting equipment for various fry shapes - from standard strips to 3D specialty cuts, according to company representatives. In the "specialty" category, Vanmark is getting ready to launch its new Helix Hydrocutting System, a high-volume curly fry cutting system. In addition, Vanmark offers distribution and transfer systems for other applications, such as dices. Vanmark equipment is designed to minimize product loss. At each step of the process - receiving potatoes, washing and peeling them, transferring them, and cutting them - Vanmark's

machines are optimized to ensure processors get the most from each potato. Company representatives explains that Vanmark's peeling machines make it easy to change roll speeds, roll types, and adjust bed depth, allowing processors to get the right amount of peel quickly without losing yield. On Vanmark's hydrocutting systems, flow meters monitor and automatically adjust cut speed to ensure clean, consistent product cuts. They also detect plugs quickly, allowing processors to isolate the hydrocutter and clear the plug immediately, reducing downtime. In addition, Vanmark uses computational fluid dynamics (CFD) analysis to precisely forecast product flow, velocity, and alignment throughout the hydrocutting system. CFD ensures a processor's specific system is optimized for maximum accuracy and yield, for reduced turbulence and breakage, and for minimizing the frequency of plugs.

PRODUCERS RESPOND TO CUSTOMERS' DEMANDS

One global trend Vanmark is watching is how consumer demand



for various products is driving production needs for our customers, company representatives points out. Consumers seek healthier products with better ingredients and less artificial coloring. That requires producers to develop new production processes and formulations. Vanmark is working with producers to collaborate on design solutions to help them adapt to the changing demands. "We partner with them on research and design and spend time in the lab to test solutions that will work best. As such, Vanmark will soon announce its new Helix Hydrocutting System, a system designed for cutting curly fries. Designed to help producers achieve high volume with maximum cut results and yield, the system utilizes twin cutting heads in a stacked configuration that allows for increased throughput, a single point of access to the cutter heads, and a moderate footprint," Vanmark representatives conclude.

MORE EXACT QUALITY STANDARDS

"At **Key Technology**, we're continuously strengthening our potato sorting portfolio through new innovations and by upgrading our existing solutions," says Carel van Buchem, Director of Sales EMEA/ASIA at Key Technology. "This process is driven by close collaboration with processors to address their specific production challenges, combined with strategic monitoring of emerging technology trends that show promise for expanding our systems' capabilities. During development, we thoroughly validate and test to ensure all concepts for new and enhanced products are optimized." According to him, Key's advanced AI algorithms are setting new standards for potato sorting by improving the accuracy of the company's optical sorters in

When a Key Technology sorter is integrated with our Key Discovery information analytics software, it can optimize both the sort process specifically and overall line performance. While identifying and removing defects and foreign material, it simultaneously collects and analyzes data about every object in the stream, delivering real-time insights and batch reports that can reveal important patterns and trends.

Carel van Buchem, Director of Sales EMEA/ASIA at Key Technology



Photos: Key Technology

detecting and removing product defects and foreign materials. "This sophisticated technology helps processors achieve more exact quality standards while minimizing the inadvertent removal of good product to achieve better yields, which means they can pack more product and increase profitability." The impact of artificial intelligence on sorting is particularly evident in how AI techniques enhance dimensional profiling of potato products and precise identification of foreign materials. He adds, AI makes the sorter's recipes – i.e., the parameters that govern product specifications – easier and faster for operators to manage. "When a Key Technology sorter is integrated with our Key Discovery information analytics software, it can optimize both the sort process specifically and overall

line performance. While identifying and removing defects and foreign material, it simultaneously collects and analyzes data about every object in the stream, delivering real-time insights and batch reports that can reveal important patterns and trends. By leveraging this information, potato processors can better manage product quality, increase yield, reduce downtime and minimize labor requirements," Carel van Buchem explains. The software's capabilities also extend to facilitating predictive maintenance and quality control measures. By generating trending data, Key Discovery can help potato processors identify potential issues before they become problems, allowing them to take preventive action to minimize unplanned downtime and optimize line performance. Key Technology's

sorting systems also contribute to waste reduction by improving product quality and yield simultaneously, according to Carel van Buchem. "Traditionally, sorters forced users to choose between quality and yield – there was an inherent trade-off to manage because removing more defects and foreign material meant that more good product was also inadvertently ejected. Now, innovations like our proprietary Pixel Fusion detection technology and Key Discovery software enable our VERYX sorters to overcome this challenge. Pixel Fusion combines pixel-level input from multiple sensor types to produce higher contrasts between objects, which enables VERYX to identify the most difficult-to-detect foreign material and defects without false rejects. Key Discovery monitors every object moving through the sorter, helping processors identify specific points where product loss occurs from receiving through

packaging." Fundamentally, he points out, sorters support sustainability by reducing false rejects to minimize food waste. This means that a higher percentage of the raw product coming into the line is processed into finished product.

DISTINCT ADVANTAGES FOR ALL PROCESSING STAGES

Key Technology's sorting systems deliver distinct advantages across both wet and frozen processing stages of potato production lines, according to Key Technology's Director of Sales EMEA/ASIA. "In wet applications, our VERYX belt-fed sorters stand apart with their unique in-air inspection capability, examining products from both the top and bottom to ensure comprehensive surface inspection. This approach virtually eliminates the chance of overlooking defects hidden on the belt-facing side of products. Our innovative VERYX design places all

critical components – including sensors, light sources and optical backgrounds – away from areas prone to product splatter, ensuring consistent performance throughout extended production runs without operator intervention. For frozen product inspection, our VERYX chute-fed sorters are typically the preferred choice because they require less space than belt sorters and frozen foods convey well on a chute. As the final inspection point before packaging, these sorters play a crucial role in quality assurance. VERYX can be enhanced with our advanced Pixel Fusion inspection technology, which combines pixel-level input from multiple cameras and laser sensors to produce higher contrasts that help the sorter identify even the most challenging defects and foreign materials. This technology virtually eliminates false rejects while ensuring that only in-grade product reaches the packaging stage, maximizing both quality and yield," he concludes. ■





EUROPEAN FROZEN FRY EXPORTS SHOW MODEST RECOVERY, BUT PRICING PRESSURE PERSISTS

European frozen fry exports posted a modest gain in April, marking the second consecutive month of volume recovery after a weak start to the year. However, persistent price erosion, coupled with subdued demand from key global markets, continues to cast uncertainty over the sector's trajectory.

According to official trade data, the EU-5 countries (Belgium, the Netherlands, France, Germany and Poland) exported 516,121 tonnes of frozen fries in April, an increase of 1.2% (6,493 tonnes) over March. The previous month had already registered improvement compared to January and February, suggesting a possible bottoming out of the recent export decline. Cumulative exports for the January–April period reached 1.61 million tonnes, reflecting a significant shortfall against previous years. The brunt of the decline has been borne by Belgium and the Netherlands, though April saw early signs of a turnaround - particularly in Dutch volumes.

DUTCH VOLUMES RECOVER, PRICE PREMIUM MAINTAINED

After four consecutive months of decline, the Netherlands recorded a 5% rise in April exports, amounting to 7,735 tonnes. Belgian exports remained stable with a modest gain of 400 tonnes, while France recorded a loss of 1,380 tonnes. Exports from Germany and Poland were virtually unchanged. Despite this tentative recovery, market pricing remains under intense pressure. Belgium continues to offer the lowest average

export price, which dropped to EUR 1,180 per tonne in April - down EUR15 from the previous month and the lowest level recorded since October 2022. At current exchange rates for April (EUR~USD1.1225), that equates to approximately USD1,326 per tonne. The Netherlands and France reported higher average prices of EUR1,370 per tonne in April (~USD1,538/t), with France showing a temporary 14% month-on-month increase. However, preliminary figures for May indicate that French average export prices fell back to around EUR1,200 per tonne (~USD1,347/t), suggesting the April uptick may have been short-lived. Interestingly, the Netherlands has managed to sustain higher average prices despite elevated raw material costs. Dutch processors typically source potatoes through fixed contracts, providing a buffer against short-term market volatility. Belgian processors, in contrast, rely more heavily on the spot market and have thus been able to take advantage of falling free-market prices. The Dutch price premium, far from undermining competitiveness, appears to reflect sustained demand for higher-quality and more premium frozen fry products, setting them apart from more standardised offerings in the marketplace.



GLOBAL DEMAND REMAINS WEAK

Demand contraction across multiple export destinations continues to weigh on the European frozen fry sector. The United Kingdom remains the largest non-EU market, but imports from the EU-5 fell 10.6% in the first four months of the year, down to 228,472 tonnes. Other core markets have shown similar trends. Spain's imports dropped 28% to 29,236 tonnes, while the United States - Europe's third-largest overseas market -

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43

bn USD was the value of the global processed potato products market in 2025.

reduced its intake by 9%. One of the more striking shifts is evident in Saudi Arabia, which slashed its imports of European fries by 41%, equivalent to approximately 43,000 tonnes. The Gulf country has increasingly turned to Asian suppliers, pointing to a rebalancing in global procurement patterns amid tighter budgets, logistical adjustments, and shifting trade alliances.

OUTLOOK: STABILISATION OR PLATEAU?

While the April export data signals a fragile rebound, it is too early to declare a



sustained recovery. Prices remain under pressure, volumes are still trailing historic levels, and demand from key markets continues to retreat. Whether the recent

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516,121

tonnes of frozen fries were exported by the EU-5 countries (Belgium, the Netherlands, France, Germany, Poland) in April.

gains in Dutch exports and modest price resilience in select countries mark the beginning of a longer-term stabilisation - or merely a plateau before further corrections - will depend on harvest developments, pricing of raw materials, and buyer confidence across global markets. As the European frozen fry industry enters the second half of 2025, it must contend not only with internal price structures and contract dynamics, but also with increasingly complex shifts in global demand and competition.

GLOBAL PROCESSED POTATO MARKET SET TO HIT USD62.2BN BY 2032

The global processed potato products market is on track to grow from USD43.0bn in 2025 to USD62.2bn by 2032, registering a compound annual growth rate (CAGR) of 5.4%, according to a forecast by Persistence Market Research. This growth is being driven by sustained consumer demand for convenient, ready-to-eat food options, rising snack consumption, and ongoing innovation in food processing technologies. Frozen potato products, especially French fries, continue to lead the category thanks to their ease of preparation, long shelf life, and compatibility with modern retail and foodservice formats. "Frozen potato products, such as fries, remain the dominant product segment," the report confirms. North America and Europe currently dominate market share, bolstered by established supply chains, high consumption rates, and mature foodservice sectors. In contrast, the Asia-Pacific region is emerging as a high-growth market, where rising disposable incomes and a shift toward Western dietary habits are reshaping food preferences.

CATEGORY PERFORMANCE AND SEGMENTATION

Frozen items, particularly fries, maintain a leading market position due to their operational efficiency for foodservice operators and home consumers alike. Dehydrated formats such as mashed potato flakes are also in high demand, especially in the industrial food manufacturing segment. From an end-user perspective, households remain the largest consumer base, though restaurants, quick-service outlets, and caterers are expanding their use of processed potatoes to meet demand

for consistent, affordable, and quickly-prepared meals. Industrial buyers using potato derivatives as inputs for other processed foods are also contributing to sector growth. The report emphasizes: "As consumer lifestyles become busier, the demand for processed and pre-prepared food products, including frozen and dehydrated potatoes, has surged."

MARKET OPPORTUNITIES AND CONSTRAINTS

Health concerns continue to shape product development. Although traditional processed potato items are frequently high in fat, salt, and calories, manufacturers are introducing alternatives such as baked or lower-sodium options. "Manufacturers are under pressure to develop healthier alternatives... This shift requires significant investment in research and development," the report notes. Raw material volatility also presents a risk. Potatoes, the industry's core input, are subject to supply disruptions due to weather, agricultural policy, and market dynamics. These fluctuations can impact pricing and production continuity. Nevertheless, consumer appetite for healthier, sustainable, and convenience-focused solutions presents a long-term growth opportunity. The report sees innovation in formulation - such as gluten-free or organic variants - as a path forward. "Manufacturers can capitalize on this trend by developing products with reduced fat, salt, and calories or by introducing new product lines."

STRATEGIC MOVES FROM LEADING COMPANIES

Major players identified in the report include McCain Foods Limited, Lamb Weston Holdings, Simplot Food Group, Aviko B.V., Farm Frites International, and PepsiCo (Lay's). Among recent developments, McCain Foods has expanded its manufacturing footprint in Asia to respond to regional demand. Lamb Weston launched a new line of lower-sodium frozen products aimed at health-aware consumers. Persistence Market Research concludes that the sector's growth trajectory remains intact, supported by structural shifts in food consumption and production technologies. The firm emphasizes that players who invest in health-forward innovations and regional expansion are best positioned to benefit. ■



A CRISPY FEELING

Texture is becoming as important as taste as far as coated foods are concerned.

The European market for coated foods continues to develop at pace. Widely appreciated as offering an affordable treat or mealtime option by many people, coated foods now feature a widening range of proteins, coatings, tastes and textures. The largest sector is meat and poultry, which includes popular foods such as chicken burgers, chicken nuggets, chicken escalopes and popcorn chicken. Much of the remainder of the category comprises fish and seafood products, where popular options include coated fish fillets, as well as fish fingers, scampi and calamari. Over the last few decades, however, the market has grown to include coated foods suitable for those following vegetarian or vegan diets. Foods such as potato croquettes, breaded vegetables and breaded cheese bites

have become more widespread, as well as coated meat and fish substitutes. This is partly being driven by health concerns, which has seen manufacturers switching towards clean labels and reducing salt and saturated fats, as well as developing alternatives to animal-based proteins. The Green Cuisine brand owned by Nomad Foods represents the largest within the market for plant-based coated foods, competing in European countries such as the UK, Belgium and the Netherlands. Texture represents one of the key challenges for manufacturers at present, with many seeking to improve the crispiness and crunch of their products. This has led to increased application of corn and modified potato starches, as well as various seeds, grains and nuts. Manufacturers have also been experimenting with ingredients to reduce oil absorption during the frying process. Various fat-blocking technologies are now

being deployed, whereby protein systems form a micro-barrier to stop frying oil from being absorbed into the coating. This has been shown to reduce fat uptake by up to 50%.

RETAIL TRENDS

Coated foods are a common feature of the European retail industry, where they enjoy a loyal following amongst a significant consumer base. From a supply perspective, the retail market is dominated by a handful of large multinational suppliers and their brands, of which Nomad Foods (owner of brands such as Birds Eye and Iglo) is the largest, although sales of own-label products are also significant. The UK has one of Europe's largest retail markets for coated fish and seafood. According to most recent data from trade body Seafish, retail sales were worth GBP981m for the year ending May 2025, down slightly by 1% from



GBP991m the previous year. During the same period, volume sales were worth in the region of 120,000 tonnes, down by around 2% from the previous year. With sales worth GBP644m, the frozen sector accounted for around two-thirds of total market value for coated products, with fresh/chilled varieties making up the remainder. The share taken by the frozen sector in volume terms increases to more than 73%. In 2025, coated products accounted for 21% of total retail sales of fish and seafood in value terms, rising to 29% by volume. Some of the largest categories within the frozen market in 2025 included battered fish fillets (worth GBP307m), breaded fish fillets (worth GBP271m) and fish fingers (worth GBP211m). Together, these three sectors accounted for 81% of the total market for frozen coated fish and seafood, which was valued at GBP981m. The battered fish fillets sector was the market's most dynamic performer during this time, with value sales increasing by almost 9%, whereas sales of fish fingers and breaded fish fillets declined by 5.7% and 4.2% respectively. By volume, sales were highest for frozen fish fingers, at nearly 42,000 tonnes. Within the last decade, only battered fish fillets and fish fingers have witnessed long-term growth, with all sectors experiencing double-digit inflation as raw material costs have increased. In many instances, this has contributed towards growth in market value. The retail market in the UK is dominated by species such as cod, haddock, scampi and, increasingly, pollock. Worth GBP115m in 2025, cod dominates the market for battered fish fillets, while sales of cod-based products are also high in sectors such as breaded fish fillets (GBP88m), fish fingers (GBP86m) and fish cakes (GBP50m). Pollock has overtaken cod in the fish fingers sector, with sales worth GBP101m in 2025, while it is worth GBP61m in the battered fish fillets category. Other notable species include scampi (which is worth GBP67m in the breaded products sector) and sole (which is the most popular variety for dusted fish and seafood products). The last few years have witnessed a trend towards cheaper species such as pollock and basa, due mostly to the higher prices cod now commands. The retail market for coated meat and poultry



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981

m GBP was the value of retail sales of coated fish and seafood in the UK (year ending May 2025).

products also continues to expand in countries such as the UK. One of the most recent growth drivers in the UK market has been the success of the Chicken Shop brand owned by Nomad Foods, which claims to replicate the taste of takeaway chicken products at home. First launched in 2018, the Chicken Shop brand has now surpassed GBP20m per annum and has grown by more than 30% within the last two years. The Chicken Shop range encompasses products such as chicken strips, goujons, nuggets and burgers. During the autumn of 2024, it was extended with several new products, examples of which included Hickory BBQ Chicken Wings, Buttermilk Chicken Tenders, Hot & Fiery Chicken Chunks and Loaded Burgers in Tennessee Style BBQ or American Style Gravy versions. A more recent development was the announcement in the summer of 2025 that Chicken Shop branded products would be available from hot counters at 340 of Morrisons' stores.

FOODSERVICE INDUSTRY TRENDS

Trends within the European foodservice industry are also a major driver in the

market. Battered and breaded chicken products represent one of the most popular options within foodservice premises such as restaurants, pubs and fast food and takeaway outlets. Popular coated foods sold within these channels include chicken burgers, nuggets, goujons and wings. In markets such as the UK and Ireland, meanwhile, coated fish is widely purchased from specialist and other foodservice outlets, usually served with chips. Europe has a growing market for fried chicken, which continues to hold its own against rivals such as burgers and fish and chips. Much of this is due to the widespread presence of operators such as KFC, which has more than 1,000 sites in the UK market, for example. However, the company faces strong competition from several new market entrants, many of which specialise in fried and coated chicken. One example is Wingstop, which operates 2,200 sites in its native US and has been operating in the UK since 2018, where it owns 57 outlets. It hopes to increase this number to 200 during the period leading up to 2030, and although it focuses mainly on chicken wings, its menu also includes chicken burgers and tenders. Another expanding US-based chain is Popeyes, which has over 1,500 locations in its home market. It currently has over 80 locations in the UK, having added 45



Coated fish and seafood products maintain a more modest presence within sectors such as quick service restaurants (QSRs). In markets such as the UK and Ireland, however, battered and breaded fish and other forms of seafood maintain a strong and loyal following, with sales heavily skewed towards fish and chip shops.

new sites during 2024. The company's speciality is battered chicken marinated in a blend of Louisiana herbs and spices, while most coated foods are served as either sandwiches or wraps. A more recent UK market entrant late in 2024 was Dave's Hot Chicken, which operates 200 outlets in the US. Having been acquired by Rook Capital for USD1bn in June 2025, it aims to open 60 sites in the UK and Ireland during the coming years. Its menu includes signature chicken-based sliders and tenders, featuring a Nashville-style hot and spicy coating. In contrast, coated fish and seafood products maintain a more modest presence within sectors such as quick service restaurants (QSRs). In markets such as the UK and Ireland, however, battered and breaded fish and other forms of seafood maintain a strong and loyal following, with sales heavily skewed towards fish and chip shops. Much of the recent innovation within the sector has involved experimentation with different tastes and flavours for coatings, as well as encouraging consumers to try alternative species amidst concerns over declining stocks of popular fish species such as cod. Although fish and chips is arguably still Britain's number one dish, the country's fish and chip shops (of which there are around 10,500) have struggled in the post-pandemic environment. According to data from Seafish, the number of fish and chip meals served out of home in the year ending September 2024 fell by 21% to 36.6 million. Fish and chip shops accounted for a disproportionate 60% of this decrease during the year, equivalent to a loss of 12 million servings. The sector has been hit hard by rising prices resulting from reduced fishing quotas for species such as cod (which has impacted upon availability of stocks), as well as poor potato harvests. It is estimated that the average price of a portion of fish and chips rose by over 50% to almost GBP10 in the five years leading up to July 2024. In 2024, fish and chip shops accounted for 56% of all fish and chip servings outside the home in Great Britain, ahead of pubs (23%). The popularity of fish and chips remains heavily skewed towards the older age groups, with the over 50s accounting for 77% of all servings. Dinners on Fridays and Saturdays are the most popular time for fish and chips, accounting for a



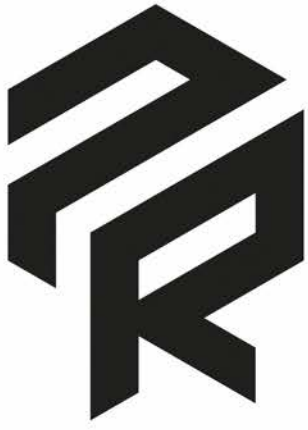
36.6
million fish and chip meals
were served in the UK
in the year ending September
2024, down 21% from the
previous year.

combined 43% of all servings, rising to 46% for fish and chip shop purchases. Cod accounted for 64% of all seafood servings within fish and chip shops in 2024, ahead of haddock (23%). This suggests that coated fish and seafood faces a variety of challenges to maintain relevance over the coming years in markets such as the UK. Not only is consumption heavily skewed towards certain demographic groups and eating occasions, but competition from food delivery operators (e.g. Deliveroo and Uber Eats) continues to increase. One potential area of untapped growth is the rising popularity of coated foods as brunch options in foodservice outlets such as pubs. Battered and breaded products already represent a popular menu item for Europe's pubs and bars, as well as being suitable for the type of shared plates often favoured during social occasions. Research carried out by Appinio for Aviko in February 2025 found that 38% of respondents were positively inclined towards brunching at pubs, with 28% most likely to opt for foods such as burgers, sandwiches or wraps.

FLAVOUR AND ETHNIC TRENDS

As has been mentioned previously, experimentation with flavours (often inspired by various ethnic cuisines) represents one of the most common forms of innovation within the market,

as manufacturers seek to create and develop new taste profiles. Some of the most popular options to date have included Far Eastern (e.g. Chinese, Thai and Japanese), as well as Indian, Mexican and, increasingly, Korean and Latin American. Additionally, tastes from the Deep South in the US remain a perennial favourite, as evidenced by the proliferation of products promoted as 'Southern Fried.' During 2024, Young's Seafood extended its Chip Shop range with new Taste of Asia and Taste of India varieties, in a bid to attract younger consumers to the category. These incorporated flavours such as Indian Masala, Korean Chilli and Lime & Ginger. The Chip Shop brand is now worth over GBP51m per year. Elsewhere, Nomad Foods extended the Birds Eye brand in March 2025 with Captains Discoveries coated fish products, inspired by international flavours. These included Tortilla Crumb Fish Fillets (which were based on Mexican cuisine and incorporated lime and chilli) and Focaccia Crumb Fish Fillets (which are flavoured with sun-dried tomatoes and thyme and based on Mediterranean cuisine). Ethnic trends have also led to the emergence of new styles of coatings. Notable examples have included tempura batter, which hails from Japan and is especially suitable for coating fish, shellfish and other forms of seafood. It is typically made using ice water, flour and egg yolks to produce a light crust with a crispy texture. Another Japanese coating which has gained in popularity is panko breadcrumbs, which offer a lighter, crispier and flakier coating compared with more traditional breadcrumbs, given less oil and grease is absorbed. ■



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FROZEN FOOD SALES SURGE IN SPAIN AND PORTUGAL AS CONSUMER HABITS THAW

Frozen foods, long relegated to second-tier status in the culinary traditions of Spain and Portugal, are surging in popularity. The latest retail data from Euromonitor shows a significant upswing in frozen food consumption across the Iberian Peninsula, highlighting not just a trend but a broader shift in consumer behavior that blends economic pressures with evolving lifestyles.

According to Euromonitor International data, Spain, Europe's fourth-largest economy, continues to dominate the region in absolute market size. In 2023, Spaniards spent EUR564.6m on frozen processed fruit and vegetables, a figure that is expected to climb to EUR651.1m by 2025. Sales of frozen processed meat and seafood followed similar trajectories, projected to reach EUR193.3m and EUR276.0m respectively within the same timeframe. Meanwhile, the frozen meat and seafood substitutes segment, still in its infancy, is set to expand rapidly - from EUR7.9m in 2023 to EUR10.1m by 2025 - suggesting a budding interest in plant-based alternatives even in a traditionally meat-loving culture.

Portugal, with a population roughly a quarter of Spain's, has a smaller frozen food market in terms of total euros spent. Yet, in per capita terms, Portuguese households are often outspending their Spanish counterparts. In 2023, households in Portugal spent EUR34.8 on frozen fruits and vegetables, compared to EUR30.0 in Spain. That difference is consistent across other categories. Per household expenditure on frozen seafood, for example, is forecasted to reach EUR15.0 in Portugal by 2025, outpacing Spain's EUR14.4. Even in the niche category of frozen meat and seafood substitutes, Portuguese households are projected to spend nearly three times as much per year as Spanish households by 2025. This divergence between total market size and per household expenditure

points to a compelling dynamic. In Spain, the growth of the frozen food sector is being driven primarily by scale - more households buying more products, even if individual spending remains modest. In Portugal, the smaller base appears more committed to frozen alternatives, suggesting either a preference for higher-quality offerings or a deeper integration of frozen foods into everyday meal planning. Several factors are catalyzing this regional frozen food renaissance. The most obvious is inflation. With prices rising across fresh produce, meat, and seafood, frozen foods have emerged as a cost-effective alternative. They offer longer shelf lives and, increasingly, comparable quality to fresh products. For budget-conscious consumers navigating the post-

pandemic economic climate, the value proposition is persuasive. But the transformation runs deeper than price sensitivity. Urbanization and changing work habits have intensified the demand for convenience. Time-starved families and young professionals are leaning on ready-to-cook meals, pre-chopped vegetables, and flash-frozen fish fillets not just as a stopgap but as a staple. The quality of frozen food has also improved significantly in recent years, with producers investing in better freezing technologies, diversified product lines, and cleaner labels - attributes that resonate with modern consumers. Spain's rapid expansion in the frozen substitutes segment is a case in point. Though the category remains small, its projected 15.4% growth between 2024 and 2025 signals a notable shift in consumer openness to alternative proteins. While only EUR0.5 per household is expected to be spent annually in Spain by 2025, the speed of growth suggests that this could be a lucrative space for new entrants and established brands alike. Portugal's

564.6
m EUR were spent in Spain in 2023 on frozen processed fruit and vegetables.

and challenges for manufacturers and retailers. In Spain, where volume drives value, expanding distribution and maintaining competitive pricing will be crucial. In Portugal, where



34.8
EUR was the per capita value spent in Portugal on frozen fruits and vegetables in 2023.

6%
is the projected increase in sales of frozen fruit and vegetables in Spain (2024-2025).

adoption, while less dramatic in terms of growth rate, reflects deeper consumer engagement, with per household spending nearing EUR1.4. The boom, however, appears to be stabilizing. After a sharp rebound in 2023, growth is expected to decelerate across most categories in both countries. In Spain, frozen fruit and vegetables will slow from an 8.8% increase in 2023-2024 to 6.0% the following year. In Portugal, the same segment will cool from 5.3% to just 3.7%. Analysts interpret this not as a market contraction but rather a normalization following pandemic-era disruptions and post-inflationary spikes. Growth is moving from exponential to incremental, reflecting a sector maturing into a permanent fixture in Iberian grocery baskets. This evolution poses both opportunities

consumers appear more receptive to premium offerings, innovation and product differentiation may hold the key. Across both markets, sustainability and health positioning will increasingly shape purchasing decisions, particularly among younger consumers who value ethical sourcing and low-waste packaging. For now, the cold aisles of Iberian supermarkets are heating up. What was once seen as a compromise is becoming a cornerstone. And as the data shows, frozen food in Spain and Portugal is no longer just an emergency option - it is an everyday choice, one that's reshaping what it means to eat well, affordably, and conveniently in the 21st century. ■





SVILA INTRODUCES NEW RECIPES

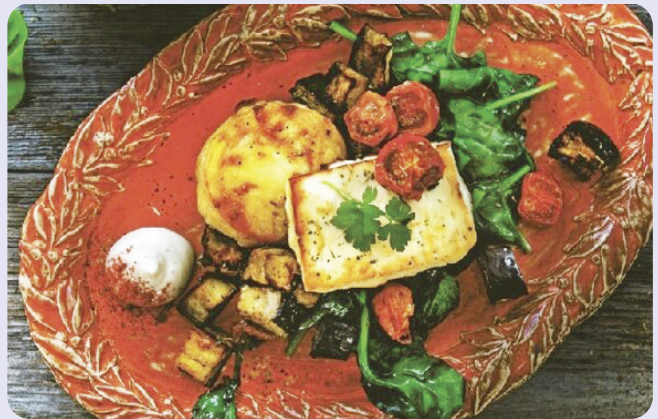
Svila Srl has recently introduced the Mamamia Sottile line into its wide range of proposals. According to the company, the proportion between the topping and the dough was designed to enhance the tasty ingredients of the topping and at the same time the crispness and flavor of the dough. The new recipes are Salami, Ham and Mushrooms for meat lovers, and 4 Cheeses and Vegetarian, for those with a vegetarian diet. All Svila's products are made with 100% Italian wheats and tomato.

<https://www.svila.it>

AVIKO SHOWCASES PLANT-BASED GRATIN

Aviko is entering the growing plant-based food market with the launch of its new One-for-all Gratin, a dairy-free, vegan alternative designed to deliver the same creamy texture and flavor associated with traditional gratins. The product also meets lactose-free and gluten-free dietary requirements, making it accessible to a wide range of consumers. The One-for-all Gratin aims to streamline food preparation in professional kitchens by eliminating the need to produce multiple gratin variants for different dietary preferences.

<https://www.aviko.de/>



PRIMA MENÜ LAUNCHES HIGH-PROTEIN VEGAN LINE



Prima Menü, a leading manufacturer of convenience meals, is expanding its product portfolio with the introduction of a new vegan range. The new line, dubbed PMV Prima Menü Vegan, will debut this July, featuring two rice-based dishes incorporating broccoli and a vegan pea protein product. The offerings include a yellow curry variant and a Tikka Masala version, both designed to deliver high protein content while catering to vegan diets. "This launch aligns with evolving customer demands for meals that are not only plant-based but also high in protein and nutritionally balanced," said a company spokesperson.

<https://www.primamenue.de/en/>

FROSTKRONE INTRODUCES THE PIZZA BOX

The Frostkrone Food Group is bringing both consumer favorites together – for a full-on flavor experience in one convenient mix box. Whether it's a cozy night in, a casual gathering with friends, or a quick snack between meals, the Pizza Box hits the spot. This innovative mix offers the best of both worlds: crispy, oven-fresh pizza paired with hearty finger food, rounded off with two perfectly matched dips. It's the ideal choice for your next binge-watching session, catching up with friends, or satisfying those little in-between-meal cravings.

<https://frostkrone-foodgroup.com/>



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[Frozen Food Europe](https://www.linkedin.com/company/frozen-food-europe)





POTATOES USA LAUNCHES 'FRY BAGS'

Potatoes USA, the marketing and promotion board for the U.S. potato industry, has introduced a new snack concept called "Fry Bags," drawing inspiration from Ireland's popular Chinese takeout staple known as the "spice bag." Unveiled in late June during a chefs' showcase at the International Corporate Chefs Association Summit in Chicago, Fry Bags offer a modern, ready-to-eat interpretation of seasoned fries. Designed with versatility in mind, the product can be sold at retail, featured on takeout menus, or prepared at home in an air fryer.

<https://potatoesusa.com/>

EMPEROR'S CHOICE EXPANDS ORIENTAL DELIGHTS RANGE

Emperor's Choice, the premium Asian food brand developed by the Jan Zandbergen Group, is expanding its popular Oriental Delights line with a new series of products aimed squarely at the evolving preferences of the European foodservice market. The brand is positioning itself at the intersection of culinary tradition and contemporary convenience. The latest additions to the Oriental Delights range include savory gyozas and crispy spring rolls, designed using traditional East Asian recipes while also drawing inspiration from modern food trends.

<https://www.emperorschoice.eu/>



MY/MOCHI UNVEILS ITS FIRST ICE CREAM SANDWICH

My/Mochi, the leading global purveyor of mochi ice cream, is expanding its product portfolio with the launch of a new format designed to appeal to texture-loving, experience-driven consumers. The company is introducing its first-ever Mochi Ice Cream Sandwiches - a sensory-centric twist on the brand's signature offering. The inaugural offerings include Strawberry Mochi Ice Cream and Sugar Cookie, as well as Vanilla Mochi Ice Cream and Chocolate Chip Cookie.

<https://www.mymochi.com/>



NISSIN EXPANDS INTO THE FROZEN AISLE

Nissin Foods, the Japanese food manufacturer best known for inventing instant ramen and its globally popular Cup Noodles brand, is entering the frozen food category with the launch of Kanzen Meal - a new line of single-serve, nutrient-dense frozen meals. Kanzen, which means "complete" in Japanese, represents Nissin's first major foray into frozen entrees and is designed to offer what the company describes as a full nutritional profile without compromising taste. The line debuts with three varieties - Fettuccine Alfredo, Spaghetti Bolognese, and Shrimp Teriyaki.

<https://www.realgoodfoods.com/>



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JANUARY/FEBRUARY

Ad closing 24.01
Publishing 07.02






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 Technology	sorting, peeling, cutting, slicing, dicing, PEF systems
Frozen Potato Market	innovative products and European overview
Process and Packaging Technology	state-of-the-art equipment and solutions
Freezing Technology	conveyor belts and transportation solutions, spiral freezing systems, freezers and chillers
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:	BIOFACH Nürnberg, GULFOOD Dubai, INTERNORGA Hamburg, FOODEX JAPAN Tokio, CFIA Rennes, Sandwich & Snack Show and Parizza, IFE London

2

MARCH/APRIL

Ad closing 28.03
Publishing 11.04

IFFA, IBA, TUTTOFOOD, PLMA, IDDBA SPECIAL EDITION

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	overview of spiral belts for applications in the food freezing industry	
IFFA & IBA Preview	innovations in process technology for the meat and baking industry, 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:	IFFA Frankfurt, IBA Düsseldorf, TUTTOFOOD Milano, PLMA Amsterdam, IDDBA New Orleans, NRA Chicago, SEAFOOD GLOBAL Barcelona, FOOD & DRINK EXPO Birmingham	

3

MAY/JUNE

Ad closing 23.05
Publishing 06.06

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:	SUMMER FANCY FOOD New York City

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JULY/AUGUST

Ad closing 25.07
Publishing 08.08

ANUGA, IBIE SPECIAL EDITION 1

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 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:	IBIE Las Vegas, ANUGA Cologne, POTATOEUROPE Lelystad	

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SEPTEMBER/OCTOBER

Ad closing 12.09
Publishing 26.09

ANUGA SPECIAL EDITION 2

Key Exhibitors Road Map and Event Agenda		
ANUGA 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	
Shock Freezing, Refrigeration & Cooling Technology	versatile applications between Shock Freezing and cooking processes	
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:	ANUGA Cologne, PACK EXPO Las Vegas, PLANT BASED WORLD EUROPE London, PACK EXPO INTERNATIONAL Chicago, GULFOOD MANUFACTURING Dubai, PLMA Chicago	

6

NOVEMBER/DECEMBER

Ad closing 19.11
Publishing 02.12

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	increasing economic efficiency in a sustainable manner
Nutrition & Ingredients	ethnic food innovation
Frozen Food in Scandinavia	producers, suppliers, consumer trends
European Retail Market	suppliers, major retail categories, food trends
Trade fairs:	MARCA Bologna 2025, FRUIT LOGISTICA Berlin 2025, GULFOOD Dubai 2025

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