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the magazine for the frozen food industry
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FROM THREE MEALS TO... ANY NUMBER

> Interview
'WE LOOK AT TRENDS, BUT WE DON'T TRY TO CHASE THEM'

> Technology
FROM BELT DESIGN TO SYSTEM INTEGRATION

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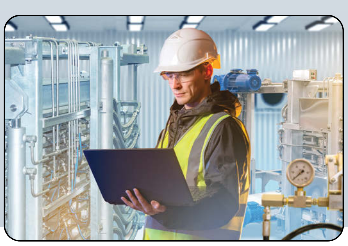
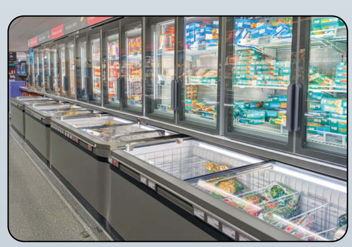
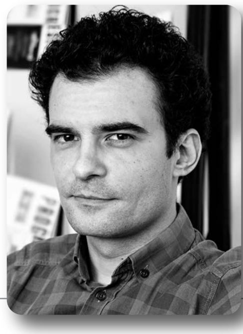




By **Bogdan Angheluta,**
Editor in Chief



GLOBAL FOOD SUPPLY CHAINS FACE MOUNTING PRESSURE

The escalation of hostilities involving US and Israeli forces targeting Iran, followed by Iranian retaliation against US allies in the Persian Gulf, has sent shockwaves through global energy markets. Since the conflict began, drone and rocket attacks on tankers have sharply increased risks, driving maritime insurance costs to prohibitive levels and contributing to a decline of more than 70% in shipping activity through the strait. The disruption has immediate and far-reaching implications.

According to the International Food Policy Research Institute (IFPRI), a prolonged conflict could significantly constrain global trade with the Persian Gulf, pushing energy and fertilizer prices higher and threatening food security, particularly in Gulf nations that rely heavily on imports of grains, oilseeds, and vegetable oils transported through the strait. The ripple effects could extend well beyond the region, affecting agricultural production costs and food prices worldwide. As mentioned, fertilizer markets are under intense pressure. Reduced shipments of natural gas, a key input for nitrogen-based fertilizers, have driven up costs, while exports from Gulf producers such as Qatar, Saudi Arabia, Bahrain, and Oman have dropped sharply. The larger issue is the fact that even if the conflict ends sooner rather than later, its impact on the global food chain will remain. Despite different scenarios showing immediate relief on costs, the reality is that such a decrease will happen gradually. As such, it is still early to know the real impact these months will have on shelf prices, and which will inevitably translate into lower consumption. This isn't an issue affecting some categories, but one that will touch every segment of the market. So, we circle back to the question that seems to be asked way too often these days: will supply chains become more resilient for the future? Let me know at **bogdan.angheluta@trade.media**. ■

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GERMANY

PACKSYNERGY APPOINTS THOMAS WOLF AS CEO

PackSynergy AG has announced the appointment of Thomas Wolf as its new Chief Executive Officer, effective April 1, 2026. He will succeed long-serving CEO Thomas Baur, who is retiring after many years with the Ravensburg-based packaging network. Baur's departure marks the end of a significant chapter for the organization. During his tenure, PackSynergy evolved into a prominent European alliance of medium-sized packaging distributors.

GLOBAL

ANUGA FOODTEC AND PMMI DEEPEN TRANSATLANTIC ALLIANCE

Anuga FoodTec and PMMI – The Association for Packaging and Processing Technologies, producer of the PACK EXPO trade shows, have formally extended their strategic partnership, reinforcing ties between Europe and North America at a time of accelerating change in global packaging and processing markets. the renewed agreement underscores a shared ambition to strengthen exhibitor access to international markets by leveraging both organizations' networks.

US

FLEXIBLE EATING, GLOBAL FLAVORS AND VALUE PROPEL INNOVATION IN THE FROZEN FOOD AISLE

American eating habits are undergoing a shift as traditional meal patterns give way to more flexible approaches to food. Consumers are increasingly replacing structured meals with snacking and smaller, more varied eating occasions, while placing greater emphasis on convenience, affordability and flavor variety. The frozen food aisle is emerging as a key beneficiary of these changes, with manufacturers introducing new products that reflect evolving consumer preferences. From globally inspired recipes to air-fryer-ready formats and portion-controlled offerings, frozen foods are adapting to meet the demand for meals that are quick to prepare but still deliver diverse flavors and nutritional options. The trend has drawn attention during March Frozen Food Month, when the National Frozen & Refrigerated Foods Association highlighted the role frozen products play in the way Americans now plan meals, snack and manage household food budgets. Research conducted by the association suggests frozen foods have become a central part of everyday eating routines. According to the organization's consumer data, 83% of shoppers say frozen foods make meal planning easier, while nearly three-quarters report they can prepare an affordable and satisfying meal using items already stored in their freezer. More than three in four adults also say frozen products provide them with a wider range of meal options. Product innovation has played a role in maintaining the category's momentum. Manufacturers have increasingly introduced foods designed specifically for air fryers, single-serve formats suited to individual meals and products featuring globally inspired flavors that bring international dishes into the home kitchen with minimal preparation. The technology behind frozen food production has also contributed to its appeal. Flash-freezing techniques help preserve freshness and nutritional value, while the longer shelf life of frozen products gives consumers greater flexibility in how and when ingredients are used.

SPAIN

BRIDOR EXPANDS GLOBAL BAKERY FOOTPRINT WITH PANAMAR ACQUISITION

Le Duff Group has reached an agreement to acquire Panamar Bakery Group, in a move that significantly strengthens its position in the premium frozen bakery and Viennese pastry segment. The transaction, representing the largest acquisition in the group's history, will be executed through its bakery division Bridor. Panamar Bakery Group is expected to generate USD695m in turnover in 2026 and employs approximately 2,600 people, underscoring the scale of the deal. The acquisition forms part of a broader expansion strategy as Le Duff Group targets USD4bn in revenue across its portfolio, which spans bakery, ready meals, catering chains and property activities. The group's brands include Bridor, Gourming and restaurant concepts such as Brioche Dorée, Del Arte and La Madeleine. Panamar Bakery Group, a family-owned business with a strong presence in retail, hospitality and foodservice, produces and distributes frozen bakery products, including bread, Viennese pastries and pâtisserie items.

US

SUPPLYONE ACQUIRES SPECIALTY PACKAGING

SupplyOne, a value-added packaging distributor with corrugated converting capabilities, has expanded its presence in the northeastern United States through the acquisition of Specialty Packaging, a packaging solutions distributor based in East Hartford, Connecticut. Founded in 2012 by Chris Orsini and Keith Streib, Specialty Packaging has established itself as a full-service provider of packaging products and services. Following the transaction, Orsini and Streib will continue to lead the business, ensuring operational continuity and maintaining existing relationships with customers.


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CEE

ROHLIG SUUS LOGISTICS APPOINTS PIOTR ZBOROWSKI TO MANAGEMENT BOARD

Rohlig SUUS Logistics, a logistics operator active across Central and Eastern Europe and Central Asia, has appointed Piotr Zborowski as a member of its Management Board, expanding the leadership team as the company seeks to strengthen its regional operations. Zborowski assumed the position at the beginning of March and will oversee contract logistics, domestic road transport and the development of the company's subsidiaries in the Czech Republic and Slovakia.

ITALY

STRATEGIC ROLE OF FIERE DI PARMA AND KOELNMESSE COLLABORATION

A renewed emphasis on economic cooperation between Italy and Germany is casting fresh light on the strategic partnership between Fiere di Parma and Koelnmesse, two major European trade fair organizers whose collaboration is increasingly shaping the international food exhibition landscape. The partnership gained added relevance following the recent Italy–Germany intergovernmental summit in Rome, where both governments reaffirmed their commitment to expanding cooperation across key sectors, including industry and agriculture.

GERMANY

FROSTKRONE FOOD GROUP SECURES REFINANCING TO SUPPORT EXPANSION PLANS

Frostkrone Food Group has successfully secured a new refinancing arrangement, marking an important step in the company's ongoing development. Backed by Deutsche Bank as its finance partner, the Group is well-positioned to maintain its strategic momentum and pursue further expansion. The existing investor group, led by EMERAM, will continue to support Frostkrone Food Group following the refinancing. EMERAM has been invested in the business since March 2017 and remains a committed long-term partner. As one of the leading investment managers for medium-sized companies in the German-speaking region, EMERAM brings extensive experience in supporting sustainable growth. "This represents a clear signal of confidence and stability. At the same time, the new financing partnership enables us to consistently drive forward our strategic investments in technology, innovation and quality," said Frédéric Dervieux, CEO of Frostkrone Food Group. The focus will be on investment in technology aimed at modernizing and automating processes, while delivering sustainable improvements in cost efficiency. As a global leader in the frozen finger food and snacks category, the Group sees significant growth potential, particularly in the chilled and bake-off segments. At the same time, it continues to expand its brand and licensing strategy. A notable example is the successful launch of its partnership with the premium brand Old Amsterdam last year. The company's diverse product portfolio is exported to over 45 countries, including markets across the EMEA region, the United States, Asia and Oceania. In a competitive market environment, Frostkrone Food Group continues to differentiate itself through a strong focus on quality, innovation and outstanding service. By 2029, the Group aims to increase its global revenue to over EUR500m. For 2026, investments of around EUR20m are planned to sustainably underpin this growth trajectory.

GLOBAL

FPS FOOD PROCESS SOLUTIONS ENTERS PARTNERSHIP WITH QUALITY ENGINEERED SOLUTIONS

FPS Food Process Solutions, a global provider of turnkey food processing technologies, has announced a strategic partnership with Quality Engineered Solutions aimed at strengthening its utilities-driven engineering capabilities and broadening its international service offering. The collaboration reflects FPS's effort to expand its technical portfolio as demand for integrated food processing systems continues to grow worldwide. By partnering with Quality Engineered Solutions, known in the industry as QES, the company aims to deepen its expertise in utilities infrastructure and engineering services that support complex industrial processing environments. Quality Engineered Solutions brings more than 25 years of experience in industrial ventilation systems, with projects spanning food and beverage processing plants as well as industrial manufacturing facilities.

NORTH AMERICA

US FOOD AND AGRICULTURE SECTOR REACHES EUR9.6TN IN ECONOMIC VALUE

The tenth annual Feeding the Economy report highlights the continued scale and resilience of the US food and agriculture sector, which generated EUR9.6tn in economic value in 2026, equivalent to nearly 20% of the national economy. Published by a coalition of 35 industry organisations, the report tracks the full farm-to-fork supply chain, including farming, processing, manufacturing, distribution, retail and foodservice. The sector supports approximately 48.7 million jobs, including 24.3 million direct roles.

GLOBAL

PURATOS TO ACQUIRE DAWN FOODS

Puratos and Dawn Foods announced that the companies have entered into a definitive agreement under which Puratos intends to acquire Dawn Foods, subject to all customary regulatory approvals. Founded in 1919 and 1920, respectively, Puratos and Dawn Foods have developed distinct and complementary capabilities, both serving professional bakers, pastry chefs, retailers and food manufacturers by translating consumer trends and insights into ingredient solutions. Dawn Foods, with operations across North America, Europe, AMEAP and Latin America, is widely recognized for its expertise in authentic American sweet baked goods and ingredient solutions for applications such as donuts, muffins, cookies and brownies. Its innovation model is driven by the creation of product concepts, seasonal inspiration and customer-ready solutions that enable bakeries to differentiate and optimize their assortment.

GERMANY

FISH INTERNATIONAL DRAWS STRONG INDUSTRY RESPONSE

The seafood trade fair fish international concluded at the end of February, with organizers and exhibitors reporting a surge of new business contacts, tangible commercial opportunities, and renewed industry momentum. First-time exhibitors in particular cited strong engagement from visitors, while long-standing participants reaffirmed the event's role as a key meeting point for the sector. Organized by MESSE BREMEN, the event aimed to mirror the realities and diversity of the seafood market.

EUROPE

EUROPEAN SHOPPERS REWARD BRANDS USING RECYCLED PLASTIC

European consumers are actively rewarding brands that incorporate post-consumer recycled (PCR) plastics into packaging, according to new research released by Amcor, as regulatory pressure builds ahead of the EU's 2030 recycled content targets. The company's latest consumer insight report draws on responses from 3,201 consumers and 32 in-depth interviews conducted across France, Germany, Spain, Italy, Poland and the UK. According to the report, 91% of European consumers are aware that supermarket products such as food, beverages, pet food, cleaning and beauty products can contain recycled plastic in their packaging.

By **Jonathan Thomas**

FROM THREE MEALS TO… ANY NUMBER

Changing eating patterns are driving demand for frozen appetisers and snacks.

One of the most fundamental challenges facing European food manufacturers over the last few decades has been the major shift in eating patterns which continues to take place. As is the case in other parts of the developed world such as the US, Europeans now consume their daily food intake in a variety of different ways. These range from the traditional three meals per day structure to eating five or six smaller meals (which offers advantages such as lower calorific intake and improved portion control) and intermittent grazing, which is characterised by a lack of structure and formality. Additionally, many consumers are also intermittently fasting for weight management purposes, which also affects how their mealtimes are structured. These shifts in eating patterns continue to present opportunities for suppliers of frozen snacks, appetisers and other finger foods throughout much of Europe. As the market has developed, it has broadened to encompass a variety of different foods – these include hot-eating snack foods (e.g. pies, pastries, pizzas and coated foods), as well as potato-based products (e.g. wedges) and various meal accompaniments traditionally associated with ethnic cuisines. However, the European market remains modest in size compared with its US equivalent, the world's largest by some margin. The immediate prospects for the European market appear promising, for a variety of reasons. Firstly, the economic situation remains volatile throughout much of the region, due to political instability in many parts of the world and the likely effect on global trade. This means consumer spending is projected to stay subdued for the future, with people more inclined to entertain and socialise within the home, rather than

#1.9
bn GBP was the value of take-home sales of pies and savoury pastries in 2024 in the UK.

#~70%
of UK households hosted at least one social gathering during 2025.

eating out. Another factor expected to drive further expansion is the continued growth of the market for in-home entertainment. In many European and North American markets, more consumers have been turning to the likes of video streaming services, as well as Netflix and Amazon Prime, for the purpose of watching films, drama series, etc. Growth within this sector is projected to continue as technology undergoes further improvement – for example, artificial intelligence (AI) is now being applied to enhance video quality. This is expected to create new occasions when consumers will demand appetisers, snacks and other types of convenience foods for eating within the home.

READY MEALS

The ready meals sector has traditionally represented one of the main components of the European market for convenience foods. However, the category is now witnessing increased overlap with the market for hot-eating snacks and appetisers, as consumer eating patterns have changed and mealtimes have become less structured and formal. To that end, many foods which in the past may have been considered ready meals or main meal components are being eaten at other times of the day. One of the main market drivers in countries such as the UK is the emergence of so-called 'fakeaways', i.e. frozen or chilled dishes which closely replicate restaurant meals, but which are prepared and eaten in the home. Not only are these convenient and more affordable than takeaway foods, but they also satisfy additional health concerns (e.g. clearer labelling of ingredients and additives). Data released by grocery delivery firm Ocado in June 2024 found that 75% of its UK customers were more conscious of their spending on takeaways and restaurant meals compared with the previous year, while 56% viewed fakeaways as an affordable treat. To address this burgeoning demand, Ocado has since increased its restaurant to retail offering by 77%. It now offers meals from leading foodservice brands such as Nando's, Gourmet Burger Kitchen, Wagamama, Pizza Express and Wasabi. Another company present in the UK market is Nomad Foods, via its Birds Eye Chicken shop brand. In September 2025, this range was extended with new fakeaway dishes, examples of which included Texas BBQ Chicken Fries, Spicy Korean Tenders, Nacho Jalapeno Chicken Fries, Sweet Chilli Tenders and Crispy Seasoned Fries. Greater consumer concerns over health and dietary intake mean that air fryers are having a greater impact upon this sector. In the UK, for example, these are now present in around 60% of households and represent the third most-used kitchen appliance after toasters and microwave ovens. To capitalise on this trend, MJ's Diner launched the UK's first frozen fakeaway meals developed specifically for cooking in air fryers during June 2024. The range included dishes such as Salt & Pepper Chicken, Hot & Spicy Chicken Wings, Chicken Nuggets, Sweet & Sour Chicken, Southern Fried Popcorn Chicken and Beef Grillsteaks, all of which were promoted as being 788 calories or less per portion. In addition to health concerns, a liking for foods inspired by ethnic foods remains as strong as ever, especially amongst the younger age groups. Ethnic foods have traditionally been well-represented within the European market for frozen and chilled ready meals, with penetration highest in countries such as the UK, Ireland, France and Germany.

This mirrors trends within the region's foodservice industry – for example, a survey of 2,000 UK consumers carried out by Curry's at the start of 2025 found that Chinese was the most popular type of takeaway food, liked by over half (51%) of respondents. This figure decreased to 36% for Indian food. Both cuisines were well-represented amongst the most popular side dishes favoured by consumers, examples of which included naan bread, fried rice and spring rolls.

PIES & PASTRIES

Savoury pies and pastries represent a popular type of snack throughout much of Western Europe, having made considerable inroads into the hot-eating market in countries such as the UK. These are sold through a wide range of foodservice channels, examples of which include bakeries, cafes, pubs, restaurants and fish and chip shops, while they are also available in frozen or chilled form at the retail level. In addition to the snacking market, pies and savoury pastries are also consumed as meal components during lunchtime and evening occasions. The UK has one of

25%

of UK consumers eat sausage rolls at least once a week.

MOST POPULAR PIES IN THE UK (% OF RESPONDENTS), 2026

Pies	%
Chicken & Mushroom	17
Chicken	14
Steak & Kidney	12
Steak & Ale	12
Steak & Gravy	12
Meat & Potato	7
Minced Beef & Onion	7
Cheese & Onion	6
Vegetable	4
Mac & Cheese	3

Source: Fray Bentos

Europe's largest markets. In 2024, take-home sales of pies and savoury pastries increased by almost 6% to GBP1.9bn. Much of the recent market growth has been driven by the premiumisation of fillings (e.g. the incorporation of heritage and locally sourced meats), the continued influence of ethnic cuisine (e.g. Indian, Mexican and Caribbean foods) and the convenient nature of many leading products. The market has also benefited from the growing perception of pies as an ideal comfort food and their subsequent association with nostalgia. Although the UK market now encompasses a wide range of pie fillings, the traditional favourites continue to dominate. According to a survey of 2,000 people carried out by Fray Bentos in the first quarter of 2026, chicken-based pies are the most popular, mentioned by 31% of respondents. As can be seen from the list below, steak-based pies are also well-represented, ahead of fillings such as Meat & Potato and Minced Beef & Onion.

The rising popularity of chicken-based pies can partially be attributed to younger consumers, such as those belonging to Generation Z. Increasingly, these people are opting for leaner and lighter forms of protein when choosing pies, at the expense of products based on 'heavier' red meats. According to the Fray Bentos survey, 31% of Generation Z consumers cited Chicken or Chicken

& Mushroom pies as their favourite, compared with 22% of those classed as boomers. In contrast, 47% of boomers preferred steak-based pies, a figure that declined to 27% of those belonging to Generation Z. One of the market's leading suppliers is Pukka Pies, which sells around 60 million meat pies in the UK and overseas every year. Its products are sold at the retail level, as well as via sports stadiums and foodservice channels (e.g. fish and chip shops). Recent new product launches have included Thai Red Chicken Curry Parcel, Hog Roast Slice and Buffalo Chicken Pie, which was created in partnership with Sauce Shop using the latter's bestselling Buffalo Sauce. One of Pukka's leading rivals is Hollands, whose pies are sold via similar distribution channels, and which claims leadership of the UK market for meat and potato pies. The remainder of the UK market is largely made up of sausage rolls and pasties. Over half (56%) of consumers eat one of these products at least once every fortnight, according to data from The Phat Pasty Company. The same research found that 42% are interested in meat-free or plant-based products, which provides some indication of the prevalence of vegetarian and vegan diets. Sausage rolls represent one of the UK's favourite snacks, with 25% of consumers eating them at least once a week. Sausage rolls remain the bestselling item for the Greggs chain of bakeries (of which there are now around 2,600 outlets), although their presence within artisanal bakeries and gastropubs continues to increase. Volume sales of sausage rolls in the UK are estimated to be worth over 300 million units per annum. Pasties, meanwhile, are strongly linked with the south-west of England, contributing an estimated GBP300m towards the Cornish economy per year. One of the leading suppliers to the retail sector is Ginsters, which is owned by Samworth Brothers and sells over 34 million of its Original Cornish Pasties per annum. In March 2026, the company teamed up with Frank's RedHot, a manufacturer of hot sauces. The result was a Buffalo Chicken version of its Pockets range of instant snacks, which had been launched the previous year. Outside the UK and Ireland, several types of savoury pies and pastries exist, either as meal components or hot-eating snacks. One of the most notable examples is the empanada, a regional speciality believed to originate in Spain's Galicia region and Portugal. Empanadas, which also enjoy a strong following throughout much of Latin America, are savoury pastries in a half-moon shape, which are usually filled with ingredients such as meat, seafood, vegetables or cheese. Elsewhere in Europe, numerous countries have a market for savoury quiches and tarts, with France representing one notable example.

25%
of UK consumers eat sausage rolls at least once a week.

60%
of households now own an air fryer.

PARTY & FINGER FOODS

Western Europe also has a growing market for party and finger foods, with in-home consumption especially high during times of the year when households are entertaining, e.g. at Christmas and New Year. According to data from Mintel, around 70% of UK households hosted at least one social gathering during 2025, while a quarter are thought to entertain guests within their homes on a weekly basis. The appeal of in-home social occasions and gatherings has been boosted by the worsening economic climate, which has made going out to eat less affordable for many. One of the main trends affecting the retail market for party and finger foods (which are most often sold in either frozen or chilled format) is the rising demand for smaller or min-sized portions of regular foods and dishes. This has partly been influenced by the situation within the foodservice industry, where many operators have increased the number of small plates on their menus at the expense of traditional two or three-course meals. Serving smaller plates can help foodservice operators to reduce food waste, while they are also more suited towards a wider range of eating occasions throughout the day. In many instances, smaller plates are also ideal for sharing and social media imaging. The growing trend towards smaller dishes has been driven in part by popular menu items such as Spanish Tapas, Chinese Dim Sum and Middle Eastern Mezze. At the retail level, ethnic foods are well represented within the market, as evidenced by the popularity of tempura prawns, spring rolls, samosas, onion bhajis and, increasingly, gyozas (i.e. Japanese pan-fried dumplings made with a range of fillings). Other popular options for in-home social gatherings include coated foods (e.g. chicken goujons, chicken nuggets and mozzarella bites), mini pizzas, potato wedges and chicken skewers. ■


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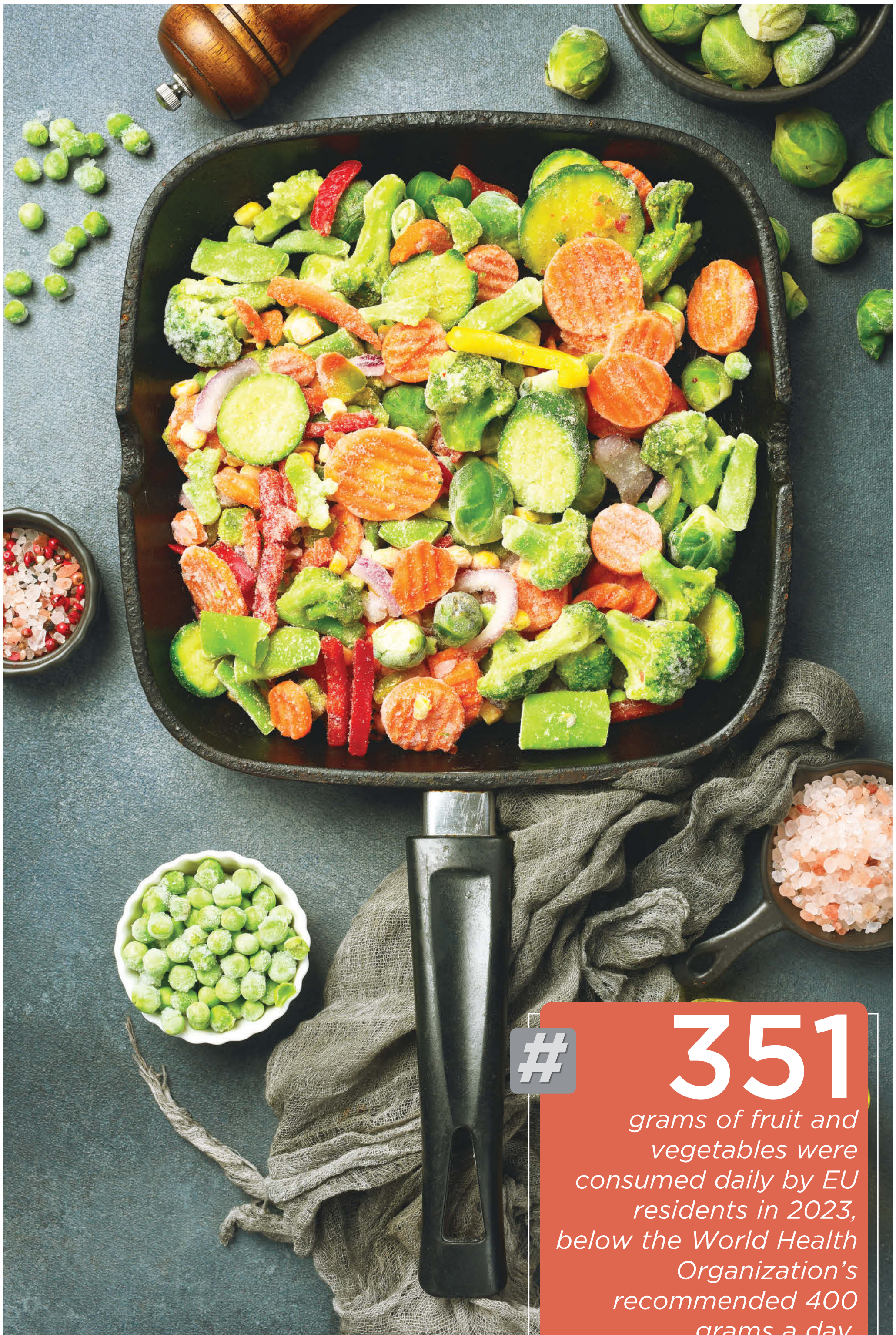
By **Bogdan Angheluta**

EUROPE'S FROZEN VEGETABLE MARKET SET FOR STEADY GROWTH



Global demand for fruits and vegetables is expanding steadily, according to a recent report by Innova Market Insights.

In its study, "Global Fruit and Vegetables Trends," Innova Market Insights said the category has posted an 8% compound annual growth rate in sales value over the past three years, underscoring the resilience of the sector even as broader food markets face volatility. The research firm noted that both value and volume have increased, with sales value and volume averaging growth rates of about 8% and 4%, respectively, over the past five years. A key driver behind that growth is a shift in consumer priorities toward health and prevention. Innova reported that "more than 1 in 3 consumers take a proactive approach to prevent health issues," a trend reflected in rising demand for products carrying functional health claims. Among those claims, immune health leads the category, accounting for 38% of health-related claims, followed by benefits tied to energy, heart health, digestive health and cognitive support, according to "Global Fruit and Vegetables Trends." The report also highlights the increasing importance of dietary inclusivity, with 29% of consumers globally saying they value inclusivity in their diet. That shift is prompting food manufacturers to expand offerings that cater to a wide range of lifestyles and requirements, including plant-based, vegan and vegetarian diets, as well as halal, kosher, gluten-free and lactose-free options. "Innova's 360

351

grams of fruit and vegetables were consumed daily by EU residents in 2023, below the World Health Organization's recommended 400 grams a day.

research highlights consumers' inclusive dietary trends," the report said, pointing to a broader transformation in how consumers define healthy eating. Despite rising demand, innovation in the category has been relatively stable. Product launches have held steady over the past three years, with vegetables continuing to dominate the category. Fruit-based products, however, are gaining momentum, showing a 5% increase in launches over the past two years, according to the report. That dynamic suggests a mature category that continues to evolve incrementally rather than through disruptive change, as companies refine product positioning and respond to shifting consumer expectations. The broader implications of the findings point to a category that is increasingly aligned with long-term consumer trends such as health optimization, dietary personalization and clean-label preferences. As Innova noted in "Global Fruit and Vegetables Trends," brands are adapting not only by expanding product ranges but also by aligning more closely with consumer values around nutrition, accessibility and lifestyle compatibility. Taken together, the data suggest that fruits and vegetables are moving beyond their traditional role as staple foods to become central components of a more tailored and health-focused global diet.

WHAT CONSUMPTION DATA TELLS US

In 2023, EU citizens consumed an average of 351 grams of fruit and vegetables per person per day, according to the European Commission, still below the World Health Organization's recommended 400 grams a day. Freshfel Europe, which compiles its annual Consumption Monitor using Eurostat and FAOSTAT data, put the 2023 figure at 350.79 grams per person per day and said it was essentially unchanged from 2022, but 2.24% below the average of the previous five years. That is the clearest sign that Europe's fresh produce market is not collapsing, but neither is it delivering a meaningful increase in daily intake. Older survey data point to the same structural weakness. Eurostat said that in 2019, one in three people in the EU reported eating no fruit or vegetables daily, while only 12% said they consumed the recommended five portions or more. That survey is not directly comparable with Freshfel's supply-based methodology, but both point in the same direction: fresh produce remains under-consumed relative to public-health goals. Frozen produce, by contrast, is benefiting from a different set of drivers. Europe remains one of the world's largest markets for frozen vegetables, with demand expected to expand steadily in the coming years as consumer preferences shift toward convenience and plant-based diets. According to the Netherlands-based Centre for the Promotion of Imports from developing countries, or CBI, the European market for frozen vegetables is projected to grow at an annual rate of 1–3% over the long term, driven by increasing demand for "ready to eat" and "easy to prepare" meals as well as a gradual move away from animal-based foods. CBI notes that Europe accounted for 47% of global frozen vegetable imports in 2023, underscoring its dominant position in the market. While import volumes

have remained relatively stable over the past five years, CBI reports that the value of those imports increased by 7%, reflecting higher prices rather than stronger demand. Looking ahead, CBI says growth will continue to be supported by convenience-driven consumption patterns and the rising popularity of vegan and vegetarian diets. At the same time, the organization emphasizes that fluctuations in supply, including harvest volumes and pricing dynamics, are likely to remain a more significant driver of trade volatility than changes in underlying demand. Despite Europe's reliance on imports, most trade in frozen vegetables takes place within the region. CBI estimates that internal European trade accounts for 87% of total imports, compared with 13% from developing countries. This reflects Europe's position as the world's largest producer of frozen vegetables. Still, imports from developing countries have been rising, increasing by 4% in volume over the past five years to reach 422,000 tonnes in 2023.

70%

of European consumers purchase healthy foods and 60% believe that increasing fruit and vegetable intake improves health outcomes.

KEY MARKETS

Within Europe, CBI identifies Germany and France as key entry points for exporters, while the United Kingdom stands out for its strong reliance on imports from developing countries. Other significant markets include Belgium, Italy, the Netherlands, Spain, Portugal and Sweden. Germany, in particular, plays a central role. According to CBI, it was the world's third-largest importer of frozen vegetables in 2023 and the largest in Europe, accounting for 17% of the regional market with imports valued at EUR791m. While import volumes declined by 0.9% annually between 2019 and 2023 to 622,000 tonnes, CBI says values rose by 7% per year over the same period, again pointing to price increases. The country sources 89% of its frozen vegetables from within Europe, with Belgium supplying 41%, followed by the Netherlands at 16%, Poland at 15% and Spain at 8%. CBI attributes Germany's demand to changing lifestyles, convenience and dietary shifts. In 2022, research by ProVeg showed that 51% of Germans have reduced their meat intake, while around 30% follow a flexitarian diet. The organization also notes that Germany and Austria have among the highest numbers of vegans in Europe after the UK, reinforcing demand for plant-based options, including frozen vegetables. France represents another major market. CBI reports that French imports reached EUR713m in 2023, accounting for 15% of European imports, although volumes declined by 3% between 2019 and 2023 to 524,000 tonnes. Consumption remains high at the household level. According to data cited by CBI from UNILET, 83% of French households consumed frozen vegetables at home in 2020, while nearly 57% of domestically harvested vegetables were frozen. The organization also highlights growth in organic frozen vegetables, with consumption rising by 3% in volume in 2021 and 6% in value relative to 2019. In the United Kingdom, imports declined from 466,000 tonnes in 2019 to 426,000 tonnes in 2023, a trend CBI links to inflationary pressures tied to factors such as Brexit and the war in Ukraine. Despite this, CBI says demand remains supported by convenience, with products such as frozen peas, green beans and vegetable mixtures dominating retail sales. The UK is also the world's largest importer of frozen sweet corn, and the organization points to rising demand for time-saving products such as diced onions and chopped garlic.

BELGIUM, A MAJOR EXPORTER OF FROZEN VEGETABLES

Belgium, meanwhile, plays a dual role as both a major importer and Europe's leading producer and exporter. CBI reports that Belgium accounted for 35% of total European exports of frozen vegetables in 2023. Imports reached EUR483m and 384,000 tonnes that year, with values increasing by 10% annually over the past five years despite a 0.5% decline in volumes, again reflecting higher prices. Much of the imported product is reprocessed and re-exported, highlighting Belgium's central role in regional supply chains. Italy and the Netherlands are also notable markets. CBI says Italy imported 242,000 tonnes of frozen vegetables in 2023, with volumes rising at an annual rate of 2% between 2019 and 2023 and values increasing by 8% per year. The Netherlands, by contrast, recorded one of the fastest growth rates in Europe, with import values rising 6% annually and volumes increasing 2% per year over the same period, reaching 197,000 tonnes and EUR290m in 2023. Across the region, CBI emphasizes that convenience remains the dominant driver of demand. European consumers are increasingly turning to frozen vegetables as a time-saving alternative, with innovations including ready-to-eat meals, pre-cooked products and vegetable-based meat alternatives gaining traction. The organization notes that this trend extends beyond retail into foodservice, where restaurants and catering providers are adopting customized frozen solutions to streamline operations. At the same time, CBI highlights growing health awareness as a key factor shaping consumption. Citing research from IRI International, the organization says that 70% of European consumers purchase healthy foods and 60% believe that increasing fruit and vegetable intake improves health outcomes. Demand for organic, vegetarian and "free from" products is also rising, with organic and vegetarian foods accounting for 53% and 39%, respectively, of consumer food purchases.

A GROWING INTEREST IN PLANT-BASED FOODS

Environmental concerns are reinforcing these trends. CBI points to declining meat consumption in parts of Europe and growing interest in plant-based diets, noting that flexitarian eating patterns accounted for 30% of consumers as of 2021. The organization also cites the European Union Agricultural Outlook 2023–2035, which projects that per capita meat consumption could decline to 1.6 kg in 2035, compared with 67 kg per capita in 2023, creating additional opportunities for vegetable-based products. Finally, CBI underscores the increasing role of innovation, particularly as private-label brands expand their presence. Companies are developing new processing techniques, product formats and packaging strategies to differentiate offerings and capture consumer attention. Taken together, the data suggest that while growth in Europe's frozen vegetable market is likely to remain moderate, the category is benefiting from powerful structural tailwinds, including convenience, health awareness and a gradual shift toward plant-based eating. ■

By **Bogdan Angheluta**

GLOBAL PACKAGING INDUSTRY PREPARES FOR INTERPACK 2026

The global processing and packaging industry is preparing for its largest gathering as interpack 2026 approaches in Düsseldorf, Germany.

Scheduled to take place from May 7 to 13, 2026, the event is expected to bring together companies from across the value chain to discuss major industry developments, including artificial intelligence, automation, emerging materials and evolving workforce skills. Roughly 2,800 companies from around the world are expected to present new technologies and concepts designed to shape the future of a globally connected processing and packaging sector. The broader backdrop for the event reflects both strong demand and mounting pressure across the industry. Global population growth, rapid urbanization and shifts in consumer habits are driving the need for more efficient processing and packaging systems. At the same time, companies face significant constraints, including shortages of raw materials, tighter regulatory requirements, supply chain risks and an ongoing lack of skilled labor. The upcoming exhibition will emphasize several major themes, including Smart Manufacturing, Innovative Materials and Future Skills. Smart Manufacturing highlights data-driven and resource-efficient production methods, ranging from artificial intelligence applications to robotics. Innovative Materials focuses on the development of new packaging substances, enhanced functionality and design-for-recycling concepts. Future Skills addresses the changing nature of work and the competencies required for increasingly digitalized and automated production environments.

LEADING MANUFACTURERS HEAD TO DÜSSELDORF

The scale of participation reflects the event's global reach. About 2,800 companies from 67 countries are expected to attend, including many of the industry's leading manufacturers. Firms such as Aasted, Sollich, Theegarten-Pactec and SACMI Packaging & Chocolate will represent the confectionery and bakery sectors, presenting technologies in Halls 1, 3 and 4. The exhibition space dedicated to food, beverage, consumer and industrial goods will span six halls, including Halls 11 through 14 as well as Halls 5 and 6. Companies such as the COESIA Group, Duravant, Gerhard Schubert, Ishida, KHS, Krones, MULTIVAC, Syntegon Technology and ULMA Packaging are expected to showcase advancements in automation, efficiency and sustainable packaging processes. Packaging materials will be another major focus of the fair, as more than 1,000 exhibitors will present materials and finished packaging products in Halls 7 through 10, reinforcing interpack's position as the world's leading trade fair for packaging materials. Labelling and marking technologies will also be featured prominently in Halls 8a and 8b, where companies such as Bluhm Systeme, Domino Printing Sciences and Totani will present their latest systems. The exhibition further highlights its global scope through the

presence of numerous national pavilions. In these dedicated areas, companies from individual countries present collectively under a national banner, pooling expertise and offering visitors a concentrated view of regional capabilities.

A WORLDWIDE REACH

Pavilions from India, China, Taiwan, Korea, Turkey, Malaysia and several European countries are among those expected to participate. Beyond the exhibition halls, interpack will host a range of accompanying programs designed to foster discussion and highlight emerging ideas. The interpack Spotlight Forum, located near the North Entrance, will feature experts examining industry developments and strategic challenges. The Start-up Zone will offer a platform for young companies to present new technologies and business models. The exhibition grounds will also host the presentation of the WorldStar Global Packaging Awards. Supplier industries will also play a central role in the event's programming. Companies will present solutions in areas such as drive technology, control systems, sensor technology, robotics, machine components and industrial software, illustrating the technological infrastructure behind modern processing and packaging operations. Sustainability and food waste reduction will receive particular attention through several initiatives, including the SAVE FOOD Expert Talks, the SAVE FOOD Highlight Route, the SAVE FOOD Awards and the SAVE FOOD Project Competition. The program will also include Women in Packaging on May 11, which will focus on the role of women in the industry. Meanwhile, interpack TV will provide live coverage from the exhibition grounds, reporting on innovations, trends and perspectives from across the global packaging community.

 # 2,800 *companies from around the world are expected to exhibit at interpack 2026.*

START-UPS TAKE CENTER STAGE AT INTERPACK 2026

A growing wave of start-ups is set to reshape the processing and packaging industry, with 22 young companies preparing to showcase their solutions at interpack 2026 in Düsseldorf, as the sector accelerates its push toward sustainability and digital transformation. The Start-up Zone, located in Hall 7a, has more than doubled in size compared with the previous edition, reflecting increased interest in early-stage innovation across the industry. Participants in the Start-up Zone represent eight countries—Germany, Sweden, India, Portugal, South Korea, Austria, Estonia and the UK—highlighting the increasingly global nature of innovation in the sector. Their solutions span a wide range of focus areas, including bio-based and recyclable materials, reusable packaging systems and specialized solutions for healthcare logistics. Digitalization is also a central theme, with several companies presenting software platforms designed to support ESG reporting, compliance with emerging regulations such as PPWR, product serialization and AI-supported operations management. These technologies reflect mounting pressure on manufacturers and packaging companies to improve transparency, traceability and efficiency across their operations. In addition to materials and software, the Start-up Zone will feature developments in process technology, including new approaches to mixing systems and intelligent platforms aimed at optimizing packaging workflows. The expansion of the Start-up Zone underscores a broader shift within the industry, where established players are increasingly looking to collaborate with or adopt innovations from smaller, more agile companies. As regulatory demands and sustainability targets intensify, start-ups are emerging as a key source of new ideas and technologies that could shape the next phase of industry development. ■

 # 67 *countries will be present at the event.*

By Bogdan Angheluta

FOOD PROCESSORS PUSH FOR HIGHER YIELDS AS SUPPLIERS DOUBLE DOWN ON PRECISION AND AUTOMATION

Equipment suppliers are under growing pressure to deliver smarter, more adaptable processing solutions. Across cutting, sorting, freezing and line integration, companies are responding with systems designed to reduce waste, improve consistency and help processors handle a wider range of products with greater precision. The latest developments point to a broader shift in the industry, where operational simplicity, automation and end-to-end performance are becoming just as important as raw processing power.

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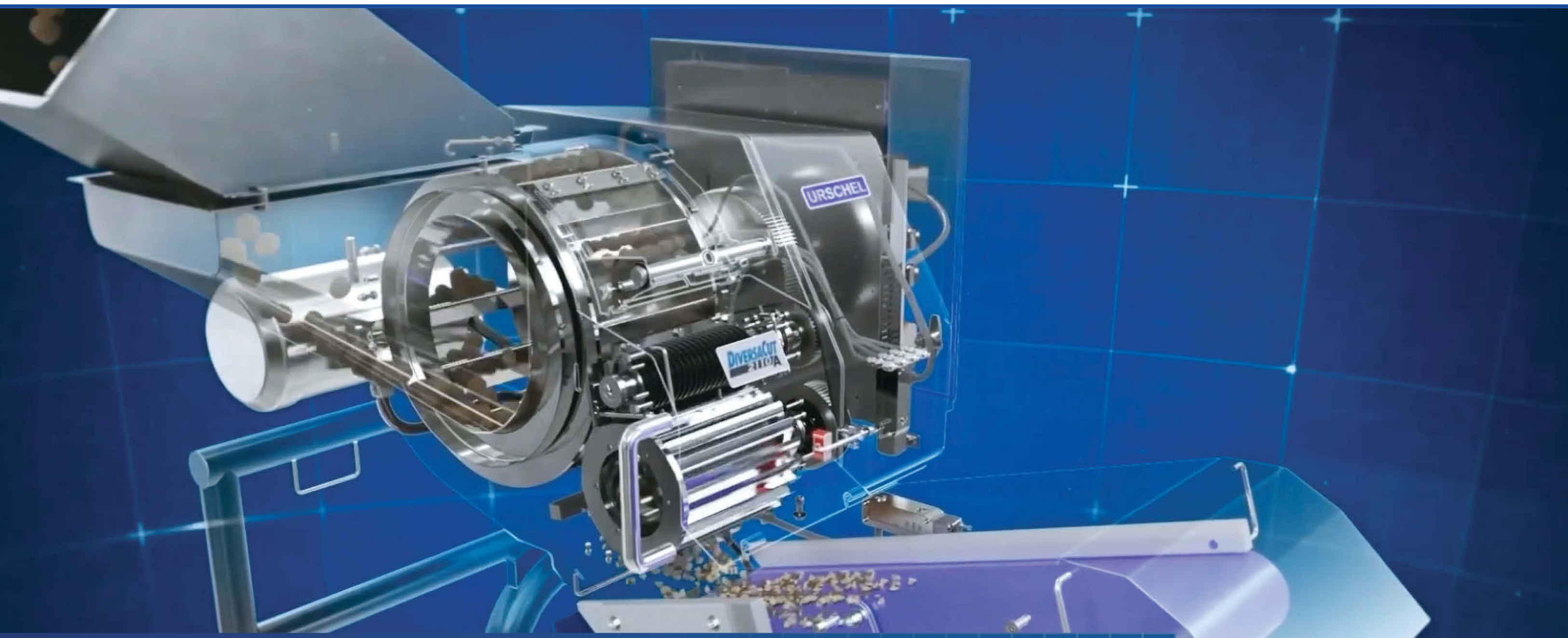

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> *Urschel heavily supports I&D (innovation and development), as we partner with processors worldwide to best understand the unique regional needs of each market. Our I&D department has invested quality time and resources into researching and working with many different customers worldwide when designing the Little Gem.*
>
> *Scott Klockow, Director of Applications and Product Development, Urschel*

Photo: Urschel

As the global leader in food processing technology since 1910, Urschel is always on the cutting edge to help processors reach their production goals. 'We continually develop new machines to support industry processors while expanding on cutting solutions already in the field, ensuring each Urschel cutting solution delivers quality performance and seamlessly meets customer's evolving needs', says Scott Klockow, Director of Applications and Product Development, Urschel. New to the Urschel global network is the Little Gem Aspire Dicer, the latest Urschel development in produce processing. The Little Gem employs patented Urschel technology to create precision cutting methods, engineered through extensive R&D (research and development). 'Urschel heavily supports I&D (innovation and development), as we partner with processors worldwide to best understand the unique regional needs of each market. Our I&D department has invested quality time and resources into researching and working with many different customers worldwide when designing the Little Gem,' he adds.

DESIGNED FOR PRECISION CUTTING ACTION

At the heart of every machine that **Urschel** manufactures, including the Little Gem, are knives.

Knives are crucial when processing fruits and vegetables. The Little Gem features a StatiCut assembly with knives designed for precision cutting action and specialty knives designed to limit cell rupturing that increase the product's shelf life. Little Gem cutting techniques diminish cell damage and facilitate juice retention to improve product yield, decrease overall operational costs, and increase profits. Urschel will feature the Little Gem at select upcoming trade shows beginning in May 2026. New processing applications include tropical fruits such as mango, guava, and papaya, as well as innovative products such as dairy-free coconut yogurts and nut milks. As different trends arise and enter the market, processors depend on Urschel to assist with R&D. Previous trends Urschel has developed alongside processors include riced vegetables and the processing of plant proteins. Urschel additionally excels at developing niche cutting styles and increasing existing capabilities of machines in the field. Scott Klockow explains that whether a machine be newly designed or recently amended, processors rely on patented Urschel cutting solutions to be versatile and adaptable for high-capacity use in rugged production environments. 'For example, versatility and adaptability are features implemented throughout Urschel machine lines. Our DiversaCut line is available in smaller or larger-sized models, with the original DiversaCut Sprint dicer operating on a 1.5HP (1.1kW) motor featuring one-, two-, or three-dimensional cut options, all while taking up limited production space. Precision cutting is achieved with the help of a compact cutting zone, allowing product to move swiftly between each cutting station. Each cutting station is incredibly close to the next step to keep product moving and produce precise output.' This cutting principle can also be seen in the medium-sized Sprint 2 Dicer and the largest dicer in the DiversaCut line, the DiversaCut 2110A Dicer. DiversaCut Dicers include increased horsepower, capabilities, and capacities at every stage to help processors keep operations running efficiently, backed by Urschel's global network of service and support. Urschel equally prioritizes increasing the flexibility of machines already in the field and introducing new cutting methods. Putting Urschel customer needs first by continuing to build and expand on capabilities of machines in the field is a factor that sets Urschel apart as a company. Examples of this include the CC (Chip Cutter) Slicer that can be adapted to lattice slicing to become a CCL or CCLL (Larger Lattice), and the E TranSlicer Cutter that can be adapted to produce 35° or 45°

> *Innovation is largely driven by three key requirements: improving yield, reducing food waste, and maintaining stable product output. In the frozen (IQF) segment, shelf life is not a key driver; processors instead focus on maximising usable output and achieving uniform cutting results.*
>
> *FAM STUMABO*

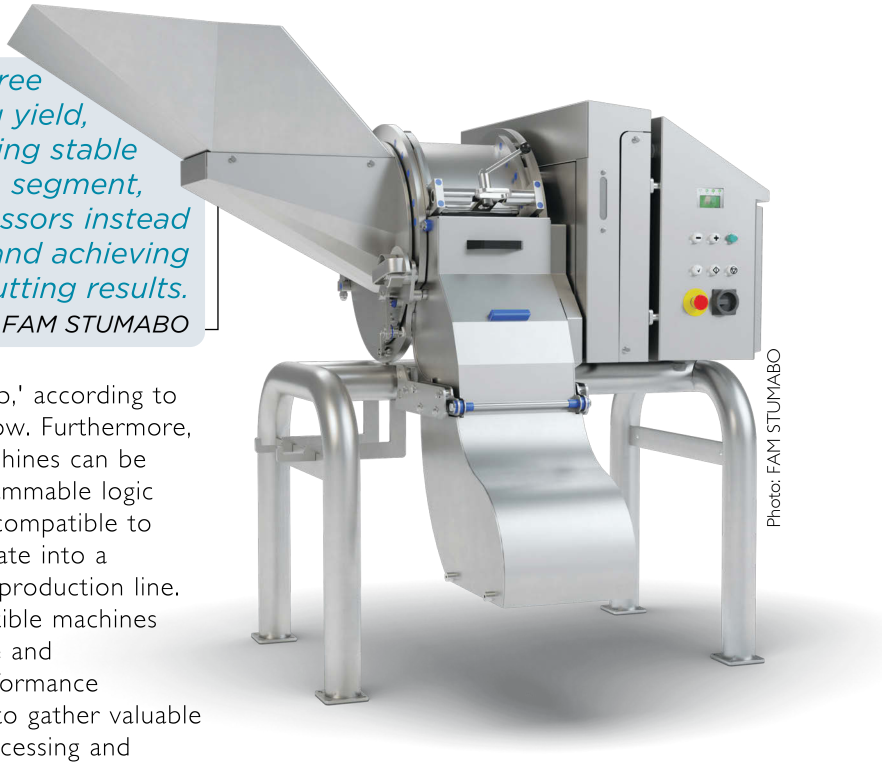
Photo: FAM STUMABO

bias slices to become the bias version of the machine.

CONSTANTLY EMBRACING CHALLENGES

'Inventive technology is part of Urschel's DNA, beginning with our founder William Urschel. Along with inventing many patented food cutting machines, he is also attributed as a pioneer in 3-D printing. Urschel, like many companies, employs 3-D printing. Urschel was also an early adopter of laser cutting and 5-axis machining. As technology evolves and a need arises, Urschel implements changes to maintain the utmost quality in workmanship,' according to Scott Klockow. Furthermore, Urschel machines can be PLC (programmable logic controller) compatible to easily integrate into a processor's production line. PLC compatible machines offer on-site and remote performance monitoring to gather valuable data for processing and production. Technology is implemented in production methods to determine the best practices to manufacture Urschel food cutting machinery. Urschel will purchase or build such technology in-house to ensure quality standards are strictly maintained. As a 100% employee-owned company with engineers, foundries, pattern makers, and development under one roof, the Urschel team constantly embraces challenges to discover new methods to manufacturing.

DELIVERING CONSISTENT HIGH-QUALITY CUTTING PERFORMANCE

'While no entirely new machines have recently been introduced in this segment, greater emphasis has been placed on refining existing solutions to meet evolving processing demands. A good example is the SureTec 240 equipped with the SureCut Unit (SCU), a solution designed to deliver consistent high-quality cutting performance under demanding industrial condition,' **FAM STUMABO** representatives explain. Designed for high-capacity applications, the SureTec 240 enables processors to handle a wide range of products while maintaining uniform cutting results and high throughput. Its robust construction ensures reliable performance in continuous production environments, particularly in frozen and large-scale vegetable processing. 'A key advantage of the SCU concept is that the cutting components for the slice-and-strip cutting action can be preassembled and adjusted outside the machine, ensuring a fast, precise, and error-free setup. This allows operators to achieve the correct cutting configuration from the very start of production, reducing setup time and supporting consistent results,' representatives add. In today's environment, processors are generally looking for new equipment that can deliver higher throughput, higher yields, quick changeovers, reduced maintenance and cleaning loads, and solutions and concepts that minimize adjustments and reduce operator dependency. Operational simplicity is the keyword nowadays. In addition to offering cutting machines capable of processing many different products, FAM STUMABO is always looking for ways to add value to processors, and therefore, new developments have been launched for niche products. A great example of this is the Yuran Capcitec, suitable for cutting bell peppers, capsicum, jalapeño, and chili peppers, as well as raw or blanched greens such as spinach, radish, kale, cabbage, and mustard leaves. 'What sets FAM STUMABO apart is its application-driven approach, where cutting is considered a critical control point in the processing line. Cutting performance directly impacts yield, product consistency, and overall process efficiency, making it a key factor in industrial food processing,' according to company representatives.

> *Vegetable processors are navigating more competitive markets with tighter margins, broader portfolios and leaner workforces. Equipment must carry more responsibility while asking less of the people running it.*
>
> *Gina Maria Bonini, President of Key Technology – Americas*

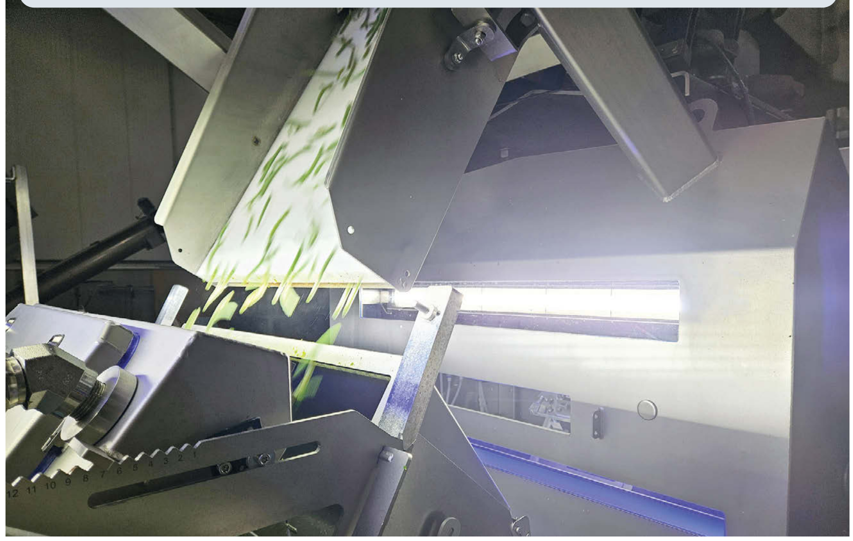
Photo: Key Technology

AN INTEGRATED APPROACH

FAM STUMABO combines robust machine design with in-house-developed precision-cutting blades and strong application expertise, ensuring stable, predictable cutting performance under real production conditions. This integrated approach allows processors to achieve consistent results while optimising throughput and reducing waste. 'Innovation is largely driven by three key requirements: improving yield, reducing food waste, and maintaining stable product output. In the frozen (IQF) segment, shelf life is not a key driver; processors instead focus on maximising usable output and achieving uniform cutting results,' company representatives say. First, cutting performance directly impacts yield and efficiency. In high-volume processing environments, even small variations can result in measurable product losses and affect overall line performance. Second, raw material variability introduces an additional layer of complexity. Differences in size, shape, and firmness directly influence how products behave during cutting, making consistency more difficult to achieve. Finally, these factors are closely linked. When cutting is not fully controlled, it can lead to yield losses and inconsistent output, thereby affecting process efficiency. For this reason, precision and repeatability are essential on the processing line, ensuring that processors can achieve predictable results across different batches and operating conditions.

THE IMPORTANCE OF AUTOMATION

Automation continues to gain importance across the food industry. According to ResearchAndMarkets, in its Global

Food Automation Strategic Industry Report from 2024, the global food automation market is projected to grow from USD11.7bn in 2022 to USD19.5bn by 2030. This reflects the need for more efficient, stable, and scalable production processes. In practice, this shift is less about individual machines and more about how equipment operates within the full production line. Cutting solutions must therefore function as part of a connected system rather than in isolation, company representatives explain. 'At FAM STUMABO, this is reflected in how machines communicate with upstream and downstream equipment in the production line. This interaction ensures that each step in the process is aligned, allowing for better coordination across the line. As a result, product flow can be stabilised and cutting performance can be matched to the capacity of the overall process, contributing to consistent output and reduced disruptions during production.'

A NEW COMPASS OPTICAL SORTER FOR FRESH AND IQF CORN, PEAS AND GREEN BEANS

Key Technology, a member of Duravant's Food Sorting and Handling Group, introduced its COMPASS optical sorter for fresh and IQF corn, peas and green beans at Expo Pack Mexico. Purpose-built for vegetable processors managing multiple SKUs, product medleys and frequent changeovers, COMPASS delivers precise, repeatable removal of foreign material (FM) and product defects across varied production requirements. Available in belt-fed configurations for fresh applications and chute-fed configurations for IQF, COMPASS protects product quality, reduces operational complexity and offers a strong return on investment. "Vegetable processors are navigating more competitive markets with tighter margins, broader portfolios and leaner workforces. Equipment must carry more responsibility while asking less of the people running it," said Gina Maria Bonini, President of Key Technology – Americas. "COMPASS reflects our decades of food processing expertise, bringing together our deep investment in sensing science and application engineering. It raises the bar for optical sorting performance while making it easy for facility teams to run, clean and maintain."

ENABLING FASTER CHANGEOVERS AND SEAMLESS TRANSITIONS BETWEEN SKUS

COMPASS features Key's advanced sensing architecture, which combines multi-channel sensor data and multi-wavelength strobing to generate up to eight streams of inspection data. Key's proprietary Pixel Fusion detection technology uses visible and infrared data at the pixel level to further sharpen contrast for finding even the most

> *For a complete freezing line solution for vegetables, berries and other delicate products, JBT Marel offers a unique combination of innovations that not only increases throughput but also protects your products from freezing damage.*
>
> *JBT Marel*

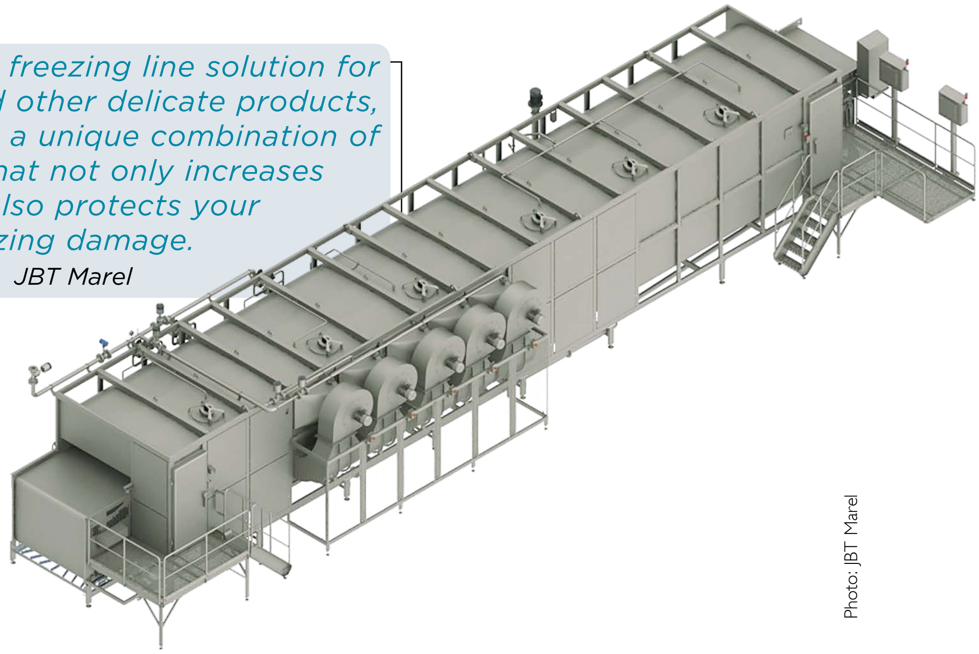

Photo: JBT Marel

difficult-to-detect FM and product defects. In many applications, COMPASS delivers detection capabilities comparable to laser-based sorters but without mechanical scanning components, lowering maintenance requirements and long-term operating costs. COMPASS identifies and removes a wide range of FM and product defects, including stones, sticks, plastic, metal and extraneous vegetable matter, as well as discolored or damaged product and large ice or frozen agglomerates in IQF applications. Object-based recognition and shape analysis enable the sorter to distinguish FM and defects that closely resemble good product, minimizing false rejects. For fresh corn, peas and green beans, COMPASS is configured as a belt-fed sorter for wet, debris-heavy environments where traditional optical systems often struggle to maintain consistent performance. The sorter can be installed at various points on the line as needed, including raw receiving and just ahead of freezing. Intelligent belt control offers automated belt tracking and optimal belt tensioning to minimize downtime while quick-release belt removal streamlines sanitation and maintenance. For IQF vegetable applications, COMPASS is configured as a chute-fed sorter designed to identify and remove FM during final quality inspection. Capable of sorting virtually any vegetable including slices, dices and medleys, it can also detect product defects when sorting single-product runs. Optional high-powered ejectors provide the force needed to remove dense or heavy contaminants, including chunks of ice, while maintaining precise control to minimize false rejects. COMPASS enables faster changeovers and seamless transitions between SKUs through recipe-driven programming accessed via an intuitive touchscreen user interface (UI). Selecting a recipe automatically adjusts sort parameters, eliminating manual recalibration and reducing operator intervention. New product recipes can be tuned directly within the UI using product-specific recipe templates without the need for an application engineer or Key service technician, giving processors greater independence as production requirements shift. This recipe-template-driven approach helps maintain repeatable sorting performance and reduces training requirements, helping processors respond faster to changing demand. COMPASS was developed with an open, washdown-ready hygienic design for harsh vegetable processing environments, with clear access to cameras and lighting for faster cleaning and protected internal components for reliable operation. It comes equipped with Key Discovery, an analytics and reporting software that collects, analyzes and shares data that can be used to reveal trends in yield, reject rates, raw material variability and upstream performance. COMPASS features a modular design and is available in multiple sizes to satisfy a wide variety of customer applications and capacity requirements. Key supports its customers worldwide through an extensive sales network and its global service team.

SOLUTIONS THAT ENSURE PRODUCT INTEGRITY, QUALITY, AND FLAVOR

Frozen fruits and vegetables is a market segment that is proving increasing popular with consumers and retailers worldwide. This popularity is due to their extended shelf life and ability to preserve nutrients. Fresh fruits can lose up to 50% of their nutrients during transportation and packaging, but freezing them on the same day they are harvested significantly reduces these losses by slowing down chemical reactions. According to the analyst GlobalData, the value of the global frozen fruit and vegetable market is expected to rise from USD35.9bn in 2023 to an estimated USD48.4bn by 2028. Long-working hours and busy schedules are driving a move towards convenient, pre-cut frozen vegetables and fruits, as consumers prioritize convenience and health-conscious choices. **JBT Marel**'s advanced technologies can improve the quality of frozen fruit & vegetables, preserving taste, texture, and nutrients, and are perfectly suited for vegetables such as peas, cauliflower, broccoli, bell pepper, carrot, beans, mushroom, avocado and corn, and fruits including berries, mango chunks, and other tropical fruits. They are also ideal for pre-prepared vegetables and potatoes that are packaged and ready for cooking; products which are designed to save time and effort in meal preparation. With JBT Marel solutions, the vegetables stay crisp and fresh during the preparation process, ready to be cooked and enjoyed with highest quality. For a complete freezing line solution for vegetables, berries and other delicate products, JBT Marel offers a unique combination of innovations that not only increases throughput but also protects your products from freezing damage. This solution ensures product integrity, quality, and flavor while handling up to 18,000 kg per hour. The complete processing line covers everything from inspection & grading, through to chopping, blanching and steaming, before finally moving to individual chilling and freezing; all delivering products that preserve their quality and nutrients for the end consumer.

PRECISION SOLUTIONS FOR CUTTING, CHOPPING AND WASHING

Beginning with inspection and grading solutions, JBT Marel's range of conveyor and inspection systems – available for every business size – ensure that only the highest quality fruits and vegetables reach the production line. From here, JBT Marel offers precision solutions for cutting, chopping and washing, as well as drying and peeling – all with focus on maintaining quality and retaining the maximum amount of yield by minimizing waste. The next phase, blanching – using the JBT Marel Urtasun Integral Blancher – is hugely important to preserving quality in vegetables. The Blancher's advanced steamers effectively deactivate enzymes detrimental to color, flavor and texture, plus help retain vitamins. It additionally softens crunchy veg, like broccoli, making them easier to pack. The Urtasun Vibratory Belt then combines with the JBT Frigoscandia FLoFREEZE IQF Freezer to separate and individually quick freeze vegetables, fruits and berries to retain the products' integrity, form and quality. The Frigoscandia FLoFREEZE IQF freezer uses pioneering fluidization technology in the field of individual quick freezing and can handle the most delicate high-end products with greatest care. 'We have managed to bring different technologies together from different sectors so we can create a single processing line for individual freezing,' explains one of JBT Marel's Sales Managers, Sergio Rabadan. 'Thanks to integration of Urtasun with Frigoscandia and other JBT Marel businesses, we are now able to offer customers complete solutions whereas before customers would have to source certain systems from other providers.' ■

CGM

Our focus is on expanding into overseas markets

How would you assess CGM's performance in the foodservice and catering segments over the past year relative to your targets?

We consider ourselves satisfied. The results achieved were in line with those of the previous year. On the one hand, we regret this because, since 2023, we have been operating a new production facility that would allow us to achieve much more positive results. On the other hand, we must consider the current global political scenario, which certainly does not help or encourage consumption. Nevertheless, we look to the future with optimism and hope that the situation will soon be resolved.

Can you highlight CGM's most important new products or product lines launched recently? What trends or customer needs drove those decisions?

With a view to offering our customers inclusive products that can give everyone a little moment of pleasure, in 2025 we launched our new **'Gluten and lactose-free line'**. It consists of seven products packaged in convenient single-serving boxes weighing 150/200g. We also have a mixed box containing two boxes of each product.
More recently, we have created **Lasagnetta 'Spritz'**, a delightful cube of lasagne weighing about 30g, wrapped in a crispy breadcrumb coating. The product was an instant hit, both for its delicious taste and its originality.
We have also added **Olives with Scamorza and potatoes** to our assortment, a product that was featured for several years in the appetizer line of a well-known fast-food chain: a valid alternative to traditional Ascolana olives, with the advantage of being meat-free and therefore something everyone can enjoy.

How do CGM's different brand lines reflect your market segmentation strategy? Are there plans to expand, refresh, or retire any specific ranges?

The CGM range is designed to meet every need. It is no coincidence that many products are available in different price ranges, corresponding to different qualities. This allows us to cater to both those who want to include good-quality products at an reasonable price on their menus, and those who are looking for top quality products.
With inclusivity in mind, in addition to what we have already done, we are working to obtain the necessary certifications and offer our customers Kosher and Halal products as well.

What is CGM's approach to private label development and collaboration with large retailers or food industry partners?

We don't rule out any opportunities.
Of course, our company's strength lies in our 'CGM' brand, but the services we offer also include the development of private labels. An example of this is the work we have been doing for many years with

Alessandro Marinangeli, CGM SPA

Interview

Bofrost and other smaller companies. More recently, we have also started several collaborations with food manufacturers.

How does CGM balance growth between domestic sales and international distribution channels?

Although it accounts for most of our work, we believe that the Italian market is saturated for us. We have around 400 active customers and do not see any particular room for growth. We are focusing particularly on foreign markets. We are already doing quite well in Europe and have a strong presence there, with excellent results in **France**, the **United Kingdom** (which was part of it until a few years ago), **Switzerland**, **Belgium**, **Albania** and the **Czech Republic**. Recently, we have started collaborations in several countries where we were not yet present, such as **Denmark**, **Croatia**, **Bulgaria**, etc.
Our real focus is on opening up overseas markets. For some years now, we have had stable commercial relationships in the **United States** and **Mexico**, and at the end of last year, we shipped our first container of products to **Canada**. We also have projects underway in several countries, including **Brazil**, **Paraguay**, **China** and **South Korea**, to name but a few.

What key risks and opportunities do you foresee for CGM this year, and how are you preparing to address them?

Opportunities are everywhere, you just need to be skilled and prepared to seize them. Having a wide range of products that can satisfy most customer needs gives you a significant competitive advantage over your competitors.
The **risks** are dictated by the situation we are experiencing: constant increases in energy and fuel costs and continuous fluctuations in the cost of raw materials mean that we are living in a situation of uncertainty, where one day things are one way and the next day they are another.
However, we are confident and hope that the situation will soon be resolved once and for all.

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By **Bogdan Angheluta**

FROM BELT DESIGN TO SYSTEM INTEGRATION

In today's high-demand frozen food sector, conveyor technology—particularly spiral belt systems—has evolved from a supporting component into a critical control point for operational performance. As processors scale production to meet growing demand for ready-made meals, frozen produce, and value-added products, the ability to maintain product integrity while maximizing throughput has become non-negotiable.

Spiral belts now sit at the intersection of airflow management, thermal consistency, and mechanical reliability, directly influencing freezing curves, energy efficiency, and overall line uptime. Selecting the right belt is no longer a matter of material preference alone—it requires a system-level understanding of product behavior, environmental stressors, and integration with increasingly sophisticated freezing architectures.

BELTS FOR FREEZERS AND COOLERS: SELECTING THE RIGHT CONVEYOR

Freezers and coolers are integral in food processing, especially as demand for ready-made products continues to rise. Choosing the best conveyor belt for these specialized environments is crucial for ensuring operational efficiency, product quality, and compliance with industry standards, according to a guide released by **Ashworth**. Freezers and coolers present a host of challenges. The environment inside these systems is often harsh and can reach sub-zero temperatures, face strong winds from fans, and deal with frost buildup on belts and machinery. All these factors can cause mechanical failures and excess wear on your equipment. Keep the freezer environment in mind when selecting a belt. If your freezer reaches sub-zero levels, be sure your belt is rated for such. Belts not suited for these climates can become brittle and warp or break in the cold.

TAILORING BELT SELECTION FOR YOUR PRODUCTS

Consider what items will be transported on the belts. Heavier objects will require a conveyor belt rated for such. This is especially true in freezers, where ice can accumulate and add weight to the belt. Alternatively, small products will require a belt with smaller openings, so products are not in danger of falling through the cracks. Loose products can wind up in machinery and cause a host of problems. Bryan Hobbs, Director of Ashworth Factory Service, advises that 'delicate products may require a tighter mesh belt to avoid unwanted markings while freezing.' The percentage of open space on a conveyor belt is another extremely important characteristic to consider. The amount of airflow determines how fast or slowly an object cools or freezes. Having a belt with a large percentage of open space can save time, energy, and money by speeding up the process. If your products freeze too quickly, delicate products like cakes and pastries may suffer cracks from drastic changes in temperature. Hobbs also points out, 'Certain products may require more surface support to maintain consumer

appeal.' If product release is an issue, the correct belt can assist. Plastic belts are favored by many due to their increased product release. However, there are several options for metal/plastic hybrid belts that give you the best features of both belts. 'Hybrid belts offer the strength of metal and with the added benefits of a plastic surface,' Hobbs explains. He continues, 'They can be a great option for products that could benefit from both belts' characteristics.' Ensuring product release prevents product losses and reduces maintenance and equipment costs by preventing unnecessary wear. Special challenges can also be addressed with optional features on conveyor belts. 'Often, belts can be customized to minimize many common challenges processors face, such as guard edges to prevent certain products from rolling off edges of the belts, or certain features can be added to minimize both product and belt damage commonly experienced with marinated products,' Hobbs said. He also recommends lane dividers for instances where products risk co-mingling to keep them regimented.

PACKFROST - 40 YEARS OF EXPERIENCE AND INNOVATIONS

For almost 40 years **Heinen** has been designing and building carton freezers (VRT – variable retention time), according to company representatives. With more than 50 installations worldwide in the seafood, meat, and poultry industries, the company is the market leader in its segment. Numerous innovations and continuous developments in automated carton freezing have helped shape the industry. 'Only through Heinen's developed and perfected sequential defrosting is it possible to operate carton freezers continuously for many years without full defrost cycles — a huge energy saving for operators when you consider the energy required to heat more than 250 lbs. of steel from −30° F to +65° F. Heinen's state-of-the-art heat-load control, energySAV, significantly reduces the operating costs of a carton freezer,' representatives explain. By continuously monitoring the heat load and providing near-continuous modulation of the refrigeration, the system can be throttled back during production downtime so that it behaves like a cold-storage warehouse and keeps the product at an appropriate storage temperature, they continue. Cutting-edge control technology, servo drives with high-resolution encoders, comprehensive digital camera systems, and flexible integration with various MES platforms, together with a solid, robust, and precise steel construction, are additional guarantees of reliability, longevity, and cost-efficiency unmatched by comparable machines on the market. Freezing capacities range from 10 lbs. to 55 lbs./h and cycle rates up to 2,000 cartons per hour. Three system widths, customer-specific storage lengths and heights, and numerous layout options (inlet/outlet positions) further demonstrate the performance and customer focus of Heinen's packfrost carton freezers. 'Heinen handles all engineering, completes fabrication in its own plant, and assembles all components on site with its own personnel. All automation, electrical installation, and commissioning are performed by Heinen staff. Programming, visualization, and electrical planning are core competencies. On request, Heinen — together with a hardware partner — can also supply complete conveying, sorting, and discharge systems including scanner technology,' Heinen representatives add.

> *Often, belts can be customized to minimize many common challenges processors face, such as guard edges to prevent certain products from rolling off edges of the belts, or certain features can be added to minimize both product and belt damage commonly experienced with marinated products.*
> *Bryan Hobbs, Director of Ashworth Factory Service*

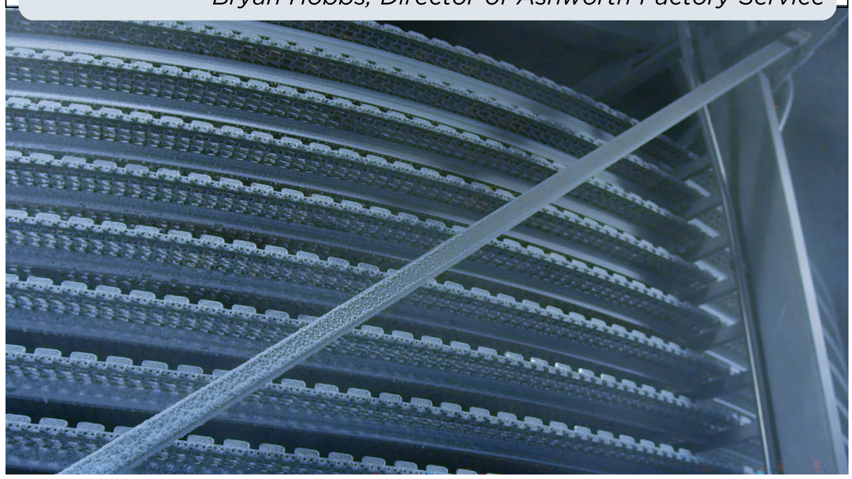

Photo: Ashworth

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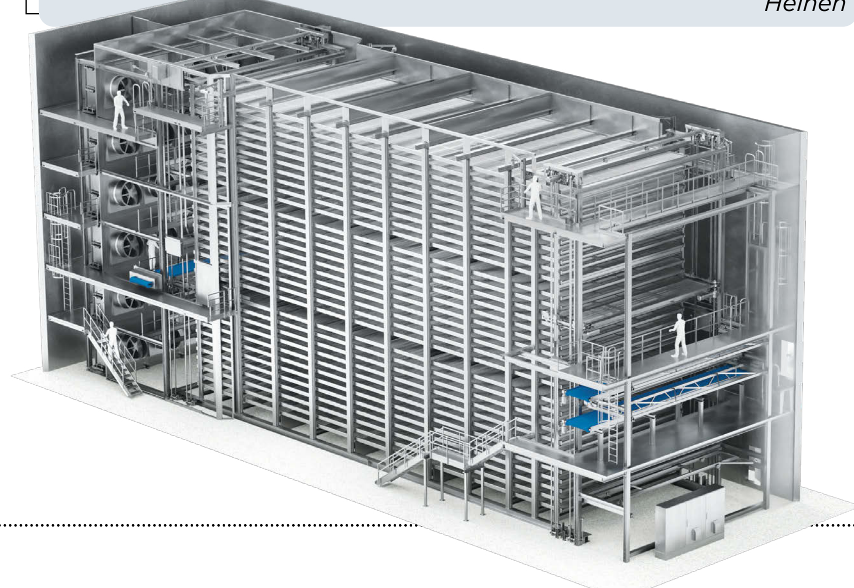

Photo: Heinen

The company offers an unprecedented combination of experience, innovation, and performance in carton freezing. 'Heinen stands for innovative cutting-edge technology and reliable service. The company sets standards in hygienic design and cleaning technology. Heinen offers solid German engineering at the highest level, as well as robust and durable constructions that ensure machine runtimes of over 30 years,' representatives go on to say. The Heinen USA Corporation, based in Alpharetta, Atlanta, GA, is a 100% subsidiary of the successful German engineering company Heinen GmbH & Co. KG from Jade, Germany, which has been thriving for over 40 years. For several decades, the company, with its 150 employees, has been supplying machines and services for freezing, cooling, proofing, and pasteurizing all types of food to customers worldwide. The company's capabilities have further increased with the move to new, modern, and expanded facilities in early 2024, allowing an average of 1-2 machines per week to leave the factory. Since 2022, Heinen USA Corporation has been serving its customers in the United States and Canada from its branch in Alpharetta, Atlanta, GA. The Alpharetta location houses offices for sales and project management, service and administration, as well as a workshop and large storage facilities for spare parts and assembly tools.

TECHNOLOGY THAT SIGNIFICANTLY IMPACTS THE OVERALL PERFORMANCE OF SPIRAL FREEZERS

Selecting the appropriate spiral belt for food processing is essential to meet specific product and operational needs, according to **FPS Food Process Solutions** representatives. Spiral belts are available in various materials, including acetal, stainless steel, and hybrid solutions. Each material offers unique advantages and disadvantages, so processors must carefully consider these factors in light of their specific requirements. 'Beyond belt materials, advancements in belt drive technology significantly impact the overall performance of spiral freezers and should be a key consideration. Traditionally, spiral belts were friction-driven by pulling the belt tight against the drum and allowing it to slip past', representatives say. This 'over-drive' system was simple to operate with basic controls, but it also had several drawbacks. These included friction loss over time due to oils and other contaminants on the drum, belt surging that caused damage to the belt and drum structure, increased belt stretch and wear, and belt flips leading to damage and crashes. In recent years, freezer manufacturers have collaborated with belt suppliers to implement direct drive technology to mitigate these issues. Direct drive technology requires significantly less belt tension because of positive mechanical engagement with the drum. This reduced tension minimizes stretch and wear, extending the life of the belt and drum. 'Positive engagement eliminates surging, which is desirable for maintaining product orientation through the spiral. Reduced belt flips and crashes lower operating costs and increase uptime. Without the need for friction, freezers can run longer between cleanings since oil or debris on the drum doesn't affect performance. These belts are often modular, allowing for quick repairs without cutting and welding, which further enhances their benefits. Direct drive technology is available in plastic, metal, and even self-stacking belts for coolers, chillers, and freezers,' representatives add.

THE EVOLUTION OF THERMAL PROCESSING ACROSS PASTA AND POUCH APPLICATIONS

As food production becomes increasingly complex, thermal processing can no longer be treated as a standalone phase. **SARP**'s approach integrates pasteurization, cooling, and freezing into a continuous system architecture, with a strong focus on pouch applications and pasta processing, according to company representatives. The result is consistent product quality, improved process stability, and reliable performance over time. The month of May marks a new step in SARP's 'From One to Forty' journey, a path that celebrates 40 years of activity (1986–2026) while retracing the company's evolution through the technologies, projects, and decisions that have shaped its identity. 'It is not simply a milestone, but an opportunity to reflect on how a company grows: through continuous dialogue with the market, through challenges, and through the constant refinement of its engineering approach. Following the direct exchange with industry professionals at the Pastaria Festival, this journey now continues across international stages, where ideas developed over time are tested, shared, and further refined,' representatives say. Over the years, this evolution has led to a clear direction: thermal treatment is no longer seen as a standalone phase, but as part of a broader, integrated system. Pasteurization, cooling, and freezing spirals are no longer just machines—they become elements of a wider process architecture, designed to ensure continuity, control, and uniformity. Applications for pasta and pouch-based products, alongside other packaged formats such as trays, molds, and bags, represent a particularly significant field of application. 'Among these, pouch processing stands out for its complexity and sensitivity to process conditions, especially when multiple thermal phases—pasteurization, cooling, and freezing—must be precisely managed within a continuous flow. In these contexts, stability is critical: even minimal variations can affect product quality, safety, and shelf life. This is particularly evident in freezing processes, where thermal uniformity directly influences product structure, texture, and preservation. For this reason, airflow management and precise temperature control are not theoretical concepts, but essential operating conditions—especially in pouch applications, where controlled heat exchange and consistent freezing curves are key to maintaining product integrity,' SARP representatives add. Uniformity allows different product types—loose, tray-packed, or pouch-based—to be processed with consistent results over time, they continue. At the same time, system flexibility ensures that each phase of the thermal process can be precisely managed: from gentle pasteurization to controlled cooling, up to high-efficiency freezing, depending on the product's specific requirements. The journey continues in May through key international events. 'At SIAL Canada in Montréal, SARP connects with the North American market, focusing on thermal solutions for packaged products and integrated production lines. At Interpack in Düsseldorf, the experience becomes more immersive: visitors will be able to explore spiral systems from the inside, gaining a deeper understanding of how thermal flows are designed and controlled. Across all these moments, the objective remains the same: to transform complex production needs into systems that work—reliably, continuously, and consistently. Because, in the end, the value of technology is not defined only by performance, but by its ability to deliver the same result, day after day—whether in pasteurization, cooling, or freezing. It is exactly in this continuity across all thermal phases that process quality takes shape.' ■

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SARP

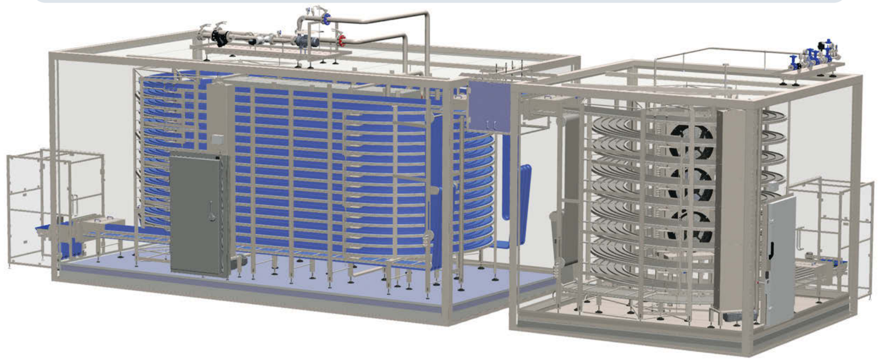

Photo: SARP

Positive engagement eliminates surging, which is desirable for maintaining product orientation through the spiral. Reduced belt flips and crashes lower operating costs and increase uptime. Without the need for friction, freezers can run longer between cleanings since oil or debris on the drum doesn't affect performance.

FPS Food Process Solutions

Photo: FPS Food Process Solutions

By **Bogdan Angheluta**

'WE LOOK AT TRENDS, BUT WE DON'T TRY TO CHASE THEM'

As awareness of Celiac disease and gluten-related sensitivities continues to grow, the gluten-free category is evolving beyond a niche segment into a structurally expanding market. Yet, despite rising demand, the space remains complex—shaped by uneven diagnosis rates, blurred positioning within the broader 'free-from' category, and increasing consumer expectations around quality and convenience. In this context, ***Declan Lockett, managing director UK & Ireland for Dr. Schär*** *discusses how the company navigates these dynamics, from product development and market positioning to growth opportunities across retail and foodservice.*

FFE: How does the demand for gluten-free products vary across different countries or markets where you operate?

Declan Lockett, managing director UK & Ireland for Dr. Schär: We see the demand as being pretty strong. It's estimated that maybe 1% of the population have Celiac disease, but I think that might well be understated. If you add those people who probably have a self-supported sensitivity or something similar to gluten, it's probably another 10%. It's difficult to get the precise figures, but nevertheless, there seems to be a growing number of people who are expressing problems with gluten. The big issue, which I think it's also an opportunity across all countries, is the level of diagnosis. There are a lot of people who are not diagnosed, who may believe they have Celiac disease or something similar. I think the demand in all the different countries in which we operate is still strong. It's also important to state that the topic of gluten-free and free-from is growing, even if there is maybe a bit of blurring of the lines, where a lot of people are talking about free-from, allergies, all in the same place. Of course, we are very clear to say that Celiac disease is not an allergy, it's not a lifestyle topic, it's very much a disease and therefore, we treat it very seriously. But overall, demand is strong. It differs by country, but there is still strong interest from consumers and retailers.

Is it difficult to communicate your message, considering many products are marketed as free-from or plant-based without addressing medical needs like Celiac disease?

I would say it's challenging in the environment you described, if you go into a store in most countries, products are typically presented as 'free from,' which covers a very wide range of offerings. Some products are not naturally gluten-free but are still classified that way, such as snack bars or protein bars. What we try to do is be very clear about our role, which is to focus on people with specific nutritional needs. That is very much the mission of the company, the passion of the owner, and of all employees. Everybody is welcome, but we're not necessarily a lifestyle brand. We're very focused on what we do, and we think we do it very well. There is a lot of noise around the category, in different countries other topics are important — lactose-free, wheat-free, allergen-free. We try to cater to those, but we wouldn't necessarily change what we do just to become more of a lifestyle brand.

How do you achieve "mainstream quality" in gluten-free products, to the point where consumers don't notice the difference?

That's the 'nirvana' for any gluten-free manufacturer, that the consumer doesn't notice the difference. It starts with the product, we do a lot of work defining what the consumer requirement is, particularly for people who were diagnosed and remember what gluten-containing food tastes like. We try, as best as we can, to replicate that experience for them. As such, during development, we try to create ambient and frozen products that are as close to that experience as possible, given the limitations of some of the ingredients that we must use. There is a misunderstanding that you take a conventional product and somehow you take the gluten away; that's not the case, we try to create great tasting products from the ground up using specific know-how, recipes, and ingredients. We do a lot of consumer testing panels in most major markets, and we have a large consumer database. We share products with them to try to understand whether we are getting close to that experience. We also carry out regular tasting panels after production to ensure quality consistency. We try to use the best of ingredients, use grains that some competitors might not, and we don't use preservatives. We do things in a difficult way, but that's very much the Schär way.

There is a misunderstanding that you take a conventional product and somehow you take the gluten away; that's not the case, we try to create great tasting products from the ground up using specific know-how, recipes, and ingredients.

How long does the development cycle typically take?

Major developments in our portfolio take years rather than months to get it right. We don't rush products to market, as being a family-owned company allows us to take the time needed. Our owner is very passionate about the food, the product, so we take the time required, especially as sometimes new technologies are needed, which also takes time to fit equipment, to test it, making sure it works properly.

Focusing on frozen products, how do they compare to ambient bakery products in terms of priority?

Ambient products are the biggest part of our portfolio and of the market. Frozen gluten-free is smaller in most countries we operate in, with some exceptions like Sweden, where bread is often frozen. But frozen is important because it provides convenience and high quality to consumers.

Where do you see the biggest growth going forward, in retail or foodservice?

Retail is very important to us, we have a strong focus on growing it, and there are also opportunities in different markets. Foodservice is a very interesting segment for us, an area where we see significant growth potential. We want to ensure that wherever people eat, especially out of home, they can find safe gluten-free options. So we do a lot of work across most of our major markets in the foodservice arena to make sure that if you go to a hotel or into a restaurant you will find gluten-free options. We do see this segment as a big opportunity, and we think we are well placed with the product range that we have.

Moving to ready meals, do you see this as an opportunity to expand the brand further?

I think we've already done that in many markets. We offer a wide range of frozen products from Dr. Schär such as pizza, pizza bases, lasagna, tortellini, desserts, all the key products you would expect. We've already extended the brand, and we continue to innovate in this area, although opportunities vary by market. In some markets, private labels are very strong and very innovative. We have a good range, and we aim to maintain a presence and offer convenient meal solutions.

Are there any consumer trends you are focusing on?

We are very aware of trends, we research the trends, but we do not try to chase every new one, because you risk losing your focus. We look at trends that align with our mission — clean label, shorter ingredient lists, sustainability, and addressing other allergens. But it's not really in our interest to follow each new trend. We remain focused on the needs of people with Celiac disease, trying to follow the right dynamic.

What is your outlook for the gluten-free market in 2026?

The market is growing in most countries in which we operate, some show single-digit growth, others are growing faster, both in value and volume. We expect continued growth, as we have had in the last few years; also, as more people are diagnosed, the market naturally grows. Once diagnosed with Celiac disease, you don't have a choice, so demand is stable and long-term. In terms of expansion, Europe remains very important, and North America is also a key focus for us. ■

By **Dieter Mailänder**,
Redaktionsbüro Dieter Mailänder

PROMISING PROSPECTS

Which factors promote the sales of ready-made meals, and which ones hinder them? Are there any other factors besides the well-known ones such as Asian ingredients, seasonings or reduced meat content? What role do the increasing aging of many societies, the growing influx into large cities or the economic shift from old to new sectors, play? Let's take a subjective look ahead.

We've all been there. You've come home exhausted, just want to put your feet up and enjoy something quick to prepare - the perfect scenario for an appealing ready-made meal: heat up a pan or preheat an oven, a microwave, or perhaps an air fryer, put in the ready-made meal, wait some minutes, and you're good to go. This need to prepare a tasty meal quickly and easily can be found all across Europe, particularly in urban centers with their vibrant lifestyles and diverse working conditions. This development has led to Europe becoming the world's largest regional market for ready-made meals last year with the value of around USD64bn. It is interesting to note how sales are distributed – half of them are concentrated in three countries: the United Kingdom, France, and Germany. Around one-third of the population of the European Union and the United Kingdom lives in this trio of countries. The main drivers of this development are often retail companies with their own brands.

OVERRIDING DEVELOPMENTS – HIGH RELEVANCE

What drives the sales of ready-made meals, whether frozen, chilled, or preserved, but what can also weaken them? Some of these developments are highly controversial, while others are merely subject to various assessments. However, there is broad agreement on the following causes:

- In almost all European countries, people are getting older and older. The median value that divides the age scale of a population into two exactly equal halves, has been rising steadily since 1950 almost everywhere but has flattened out in recent years. Regardless of that, the legal age limits at which people can retire remained largely unchanged in most countries; only a few have an automatic mechanism whereby retirement is linked to life expectancy and changes in line with this. One example of this is Sweden, where this procedure is widely accepted. It should be noted that the actual retirement age is often significantly lower than the statutory retirement age, for example, due to early retirement.
- Not only in Asia or Central and South America, but also in Europe, the proportion of the population living in urban centers has been growing since 1950 at the expense of the rural population. However, it has remained relatively stable for the past ten years.
- Many European countries are being forced to undergo massive transformations due to the current geo-political and geo-economic constellation of the US, China, and Russia. Traditional industry branches must open up new lines of business; otherwise, they lose their business foundation. Thousands of jobs are being lost in these sectors. Those that arise in dynamic, innovative, future-orientated lines of business will only be able to substantially compensate for these losses in the distant future. The result: societies are becoming more divided. One part of them enjoys relatively secure, good to very good incomes. The other part only achieves low, often fluctuating, and in some cases even precarious incomes, which are often generated from multiple jobs.
- Time restraints, which boost the sales of ready-made meals, are caused not only by workloads but also by so-called leisure stress. People like to pack their free time with so many activities that they are just as exhausted in the evening as they are when they finish work.

This flash review shows that in the near future, overriding developments will influence the sales of ready-made meals in Europe, which may not always be captured by traditional market research. They overshadow the much-discussed product-related influencing factors, which will remain relevant. These currently include Asian ingredients and seasonings, high protein content, regionally produced components, meat-free recipes, the replacement of additives that are perceived as critical, environmentally friendly packaging, a lower carbon footprint along the supply chain, and more.

A THROW-IN FROM THE SIDELINE

Beyond these well-known influencing factors, there are others that are throwing their balls onto the ready-made meal playing field from the sidelines, so to speak. Of particular interest is the weight-loss injection, which could have a noticeable impact on the ready-made meal market. Why? Obesity has been a serious problem in many societies for decades. In the US, compounds have been on the market for some time that allow consumers to inject themselves with a substance that mimics the body's own hormone GLP-1. It causes an early feeling of satiety, so that users consume less food and thus fewer calories. One obvious side effect is that the so-called "lean muscle mass" is weakened unless the user increases

their physical activity. Another problem is that the compound must be injected on a long-term basis. If it is discontinued without significant changes in food intake, weight is quickly regained. It is unclear whether there are broad based-studies on this. According to the estimates, 18% of US consumers used such weight-loss injections last year (many will have only tried them) and spent USD70bn on them—the equivalent of just over USD1,100 per user. They currently have to pay around USD300 per injection. During the launch phase, the price was USD1,400. The price decline is therefore enormous and will continue as patents in India, China, Canada, and Brazil expire in the near future. The first two are the most populous countries on earth with 1.5 and 1.4 billion people, respectively. And both have powerful pharmaceutical industries. Therefore, it can be assumed that the capacities for these products will be ramped up—with corresponding effects on Europe as well. In the UK and Germany, current usage is estimated at up to 7% and medium-term potential at up to 15%. What spillover effects on the ready-made meal market are conceivable if weight-loss injections are classified as safe in the long term by neutral experts, and perhaps even reimbursed by statutory health companies? How strongly will they establish themselves if they also come onto the market as pills? Will these compounds then also influence the demand for ready-made meals? Three aspects are likely to come into focus:

- As in the UK, retailers in other countries could also stock special products on their shelves that meet the changed nutritional needs of users of weight lost injections.
- The recipes for ready-made meals could change, moving towards more compact ingredients with more proteins and fiber as well as a higher energy density.
- Portion sizes could become smaller with lower energy content but the same satiety effect. They could also remain the same but should then consist only of nutrient-rich components that have a lower energy density but stretch the stomach to produce the same satiety effect.

Ready-made meals are and remain an exciting topic. Overriding developments such as increasing urbanization or the continuous decline in the amount of free time not taken up by work, sport, cultural activities, care giving, parenting, volunteer work, or other fixed commitments are boosting sales for ready-made meals. Frozen products score points, above all, because they can be easily stored and meet high culinary and nutritional standards. A prerequisite for their sales is an income that makes it possible to purchase them. Other factors such as the increasing aging of many societies are leading to different developments. Older people have more time, which they can use to prepare their meals. On the other hand, they are often physically and/or mentally limited and therefore use (frozen) ready-made meals. In the past, many manufacturers have successfully adapted their products to the new requirements. There is every indication that they will also be successful in doing so in the future. ■

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bn USD was the value of the European ready-made meals market in 2025.

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By **Julie Hanson,** Global Cold Chain Alliance Director for Europe

2026 GCCA EUROPEAN COLD CHAIN CONFERENCE

Uncertainty and preparedness provided a backdrop to the annual meeting of European cold chain executives that took place in Dusseldorf in March 2026. The annual conference convened by the Global Cold Chain Alliance (GCCA) brings together Europe's temperature-controlled logistics leaders in a unique and important forum to discuss market and logistics trends, analysis of the developing impacts of global events, and consideration of the challenges and opportunities of the future.

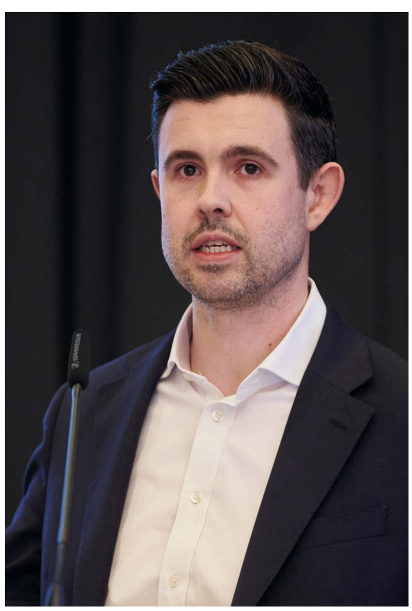
This year's conference took place as governments and businesses alike assessed the developing impacts of the conflict in Iran on food supply chains. Widespread uncertainty about the full impacts of the conflict on global shipping and energy supplies was an underlying theme throughout the conference's Leadership Outlook session, featuring Lineage Co-founder Kevin Marchetti, Americold Managing Director Europe Andrew Mates, and Constellation Cold Logistics Chief Growth and Transformation Officer Abhy Maharaj. There was consensus that unpredictability is the new norm and it is vital for cold chain operators and the food supply chain as a whole to ensure resilience, agility and responsiveness. The Leadership Outlook panellists also discussed temperature-controlled logistics capacity trends in Europe. Over the course of the 2020s to date, cold storage space has been increasing apace. This capacity expansion has slowed but storage levels remain high, with many food industry customers choosing to hold capacity and keep products in storage for longer to support their resilience in the face of ongoing uncertainty and disruption. These leadership sentiments were supported by data that was explored during the conference by Casper Roex, Partner at OC&C Strategy Consultants, who led an insightful session about capital access in

Europe for cold chain and food industry investment. Roex laid out the data that demonstrates how Europe's cold storage construction boom has now slowed. He did however add that whilst new construction is limited, there is opportunity for further consolidation in what is still a quite fragmented business sector. He highlighted that deal activity might increasingly shift to Southern and Eastern Europe where the strongest growth opportunities remain.

DEMAND CONTINUES TO BE POSITIVE

Explaining why demand for cold chain services in Europe continues to be so positive, Roex pointed to the increase in food being produced, imported and consumed; food tending to travel longer distances; and food now being stocked for longer. In addition, Europe is seeing an increase in frozen food share, driven by foodservice growth, lower waste, better nutritional value, and improved distribution efficiency and flexibility. While the overall picture is of continued demand growth, Roex advised that red meat production (primarily concentrated in North-Western Europe) is expected to decline further going forward. An overall growth story does not mean that all regions of Europe will share in it equally. Roex demonstrated the impacts on capital deployment strategies of the current challenging market conditions and of pressured expansion economics (including the increased costs of borrowing and construction). He showed how investors are placing greater focus on internal value creation levers such as automation and AI, energy resilience and sustainability; and how businesses are derisking expansions by prioritising incremental growth, offering value-added services and 'locking in' customers before investing in new or improved capacity. The focus then shifted to trade and food sector trends. These were laid out by Juliana Violato, Senior Management Procurement at Tyson Foods. She shared the growth rates expected by Euromonitor for frozen and chilled proteins between 2026 and 2029, including 11.5% growth in frozen red meat, 9.3% in frozen poultry and 4.3%

in frozen seafood. In each of these categories, expected growth rates are higher for frozen than chilled products. Violato's reasoning for this disparity included a strong consumer shift toward convenience, improved freezing technologies, broader product ranges and rising penetration of online retail and direct-to-consumer frozen meal delivery services.
Insights into the frozen food market in Germany specifically were provided by Dr. Sabine Eichner of the German Frozen Food Institute (DTI). The strength of frozen food in Germany was demonstrated by long-term sales growth and a household penetration rate of 96%. Dr Eichner highlighted that the strength of frozen food in Germany lies not only in the product but also in the coordination of production, storage, transport, retail,



and professional use. DTI's research shows a strong appreciation in Germany for the contribution made by frozen foods towards food waste reduction and healthy eating.
Perception and appreciation of the qualities of frozen food was central to the inspiring call to action from Oliver Thomas, Head of Corporate Affairs at Nomad Foods, Europe's largest frozen food brand owner. Thomas described how frozen food is being reappraised, no longer seen only as a convenience category but increasingly recognised as a nutritious, practical and high-quality part of modern diets. He highlighted the role of frozen food in supporting healthier choices, helping households manage stretched budgets, fitting around time-poor lifestyles, and reducing food waste. The benefits of frozen food for consumers, societies and economies depend on a strong, efficient cold chain that preserves quality, extends shelf life, improves resilience and enables food to be available safely and year-round. Thomas shared key findings from 'Frozen in Focus', Nomad Foods' flagship research programme exploring the evolving role of frozen food in modern diets in Europe. The research found that frozen food is entering a new era where it is increasingly recognised not just for convenience, but for its nutritional value, sustainability and role in supporting modern lifestyles. However, the research also found misconceptions remain about frozen food, particularly among younger demographics. Changing perceptions is an ongoing effort that requires continued transparency, advocacy and innovation.

THE ROLE OF AI

Considering innovation more widely, the adoption by Europe's food logistics network of future-facing systems, processes and technologies is being turbo-charged by Artificial Intelligence (AI). Jonathan Cook, Information Security Director at Constellation Cold Logistics, led a fascinating session at the conference examining AI and its cyber-security implications. Cook highlighted that while AI is driving forward efficiency and sustainability, AI platforms also materially increase organisational

attack surface. He advised that the risk extends beyond data loss to integrity risk: AI security is no longer a technology issue alone, but also a business, governance, and risk management priority requiring the same rigor as core enterprise systems. Cook flagged the Network and Information Security Directive 2 (NIS2), the EU's updated cyber security regulation which focuses on resilience, governance, and accountability. Just as AI is transforming how temperature-controlled logistics operates, the shifting global trade landscape is driving major changes in Europe's food trade. A panel of experts discussed the changes they are seeing and the secure, modern border that Europe requires for food imports and exports. Alice O'Donovan, Secretary General of CELCAA (European Liaison Committee for Agricultural and Agri-Food Trade), Matteo Alexander Nenciolini, Sustainability Policy Manager at the European Shippers Council, Tineke Van de Voorde, Key Account Manager at the Port of Antwerp-Bruges, and Juliana Violato joined Shane Brennan, SVP Global Policy at GCCA, to explore how Europe's cold chain operators are responding to customers' changing needs and helping to overcome food trade challenges. Key themes included the importance of minimising trade frictions such as those resulting from SPS processes, the need for adaptability and flexibility to maintain continuity in the face of successive disruptions, and scope for the European Union to balance global leadership on sustainable trade with economic realities. Throughout the conference, there were a number of discussions among speakers, panellists and delegates about positive progress in recruitment and retention for the temperature-controlled logistics workforce. This must remain an area of close attention, but focus is increasing on the industry's changing skill needs as the cold chain evolves, as customers' needs change, and as new technologies are more widely adopted. GCCA supports cold chain skills development through the Cold Chain Institute, a three-year programme offering temperature-controlled logistics professionals the opportunity to learn new skills as we look to the cold chain's future. The next Cold Chain Institute Europe will take place 7-9 September in Rotterdam, Netherlands. Europe's temperature-controlled logistics industry continues to meet the multiple challenges of storing and moving frozen food, with adaptability and resilience. Looking to the future, there is cause for positivity as the industry continues to invest in innovation, skills and resilience, however the potential global impacts of conflict in Iran are raising serious concerns. Collaboration will help the food supply chain to address the challenges and maximise the opportunities ahead, and GCCA is proud to create forums such as the European Cold Chain Conference for food and logistics leaders to come together and discuss the path forward. ■

By **Bogdan Angheluta**

'FROZEN FOOD IS VERY WELL PLACED TO PLAY A MUCH BIGGER ROLE IN THE UK'S FOOD LANDSCAPE'

Growth in the UK's frozen food category is increasingly being driven by perception as much as price. Rupert Ashby, CEO of the British Frozen Food Federation, says changing consumer attitudes toward quality are playing a central role in the sector's resilience and expansion.

'The UK frozen food category continues to demonstrate strong resilience. Circana data shows the total market now stands at just over GBP9.2bn in the 12 months to February 2026, with year-on-year value growth of 3.4%. Within that, savoury frozen remains the largest segment at GBP6.7bn, while sweet frozen, at GBP2.5bn, is driving much of the momentum with double-digit growth of +12.7%,' according to Rupert Ashby, CEO of the British Frozen Food Federation. 'What is particularly striking is how this growth is being fuelled by a shift in consumer perception. Research from consumer insight specialist Vypr shows that almost nine in ten shoppers believe the quality of frozen food has improved in recent years. That marks a real turning point for the category, which is increasingly seen not as a compromise, but as a high-quality, and increasingly healthy option,' he explains.

AFFORDABILITY AND HEALTHIER EATING, MAIN CHALLENGES FOR UK CONSUMERS

That shift, Ashby points out, comes at a critical time. Frozen sits at the intersection of two major challenges facing UK consumers, affordability and healthier eating. 'It offers strong value, helps reduce waste, and provides convenient access to nutritious options all year round. The affordability benefits are undeniable - we carried out research last year that showed that the cost of the government-recommended diet of five portions of fruit and vegetables a day was GBP1100 less per year when buying frozen, compared to chilled products.' The study that he is referencing was released in October 2025 and showed that British households aiming to eat healthily could cut grocery bills by more than GBP1,100 annually by switching from fresh to frozen fruit and vegetables. Using supermarket prices (valid at the time of research), the BFFF compared the cost of an 80-gram portion of five commonly purchased fruits and vegetables—broccoli, spinach, mixed vegetables, strawberries, and blueberries—in both fresh and frozen forms. The analysis found that fresh portions cost an average of GBP0.46, compared with GBP0.30 for frozen alternatives. That 16-pence difference per portion translates into potential savings of GBP0.80 per person per day for those meeting the "5-a-day" target. For a family of four, the weekly savings amount to roughly GBP22.40—or about GBP1,165 per year. The research was part of the BFFF's Frozen Food Revolution campaign, launched to inform and engage consumers about the affordability, nutrition, and sustainability benefits of frozen foods. TA consumer survey conducted by insight platform Vypr for the BFFF found that 51% of UK adults believe rising prices for fresh produce have made it harder to achieve their daily fruit and vegetable goals. The federation said it hoped to demonstrate that frozen food provides a more accessible route to nutritious eating by offering longer shelf life, convenience, and value. In addition to lower prices, frozen produce often retains its nutrients for longer. Studies show that chilled spinach retains just 20% of its vitamin C content after seven days, while frozen spinach maintains nearly 80%—a level that declines to only 50% after a full year. Additional data from Nomad Foods' Frozen in Focus

9.2

bn GBP was the value of the British frozen food category in the 12 months leading to February 2026.

> *One of the key constraints remains freezer space in British homes. While demand for frozen food is growing, many households are limited by the size of their domestic freezers, which naturally caps how much they can buy and store.*
> *Rupert Ashby, CEO of the British Frozen Food Federation*

report suggests even greater potential savings. Nearly one in five consumers said they could save between GBP6 and GBP10 per week simply by organizing their freezer contents—an efficiency that could add up to roughly GBP530 per year.

A CHALLENGE FOR THE CATEGORY, BUT ALSO AN OPPORTUNITY

Innovation is accelerating, as growth in areas like desserts and ice cream, alongside more premium and trend-led ranges, shows how the category is evolving to meet changing tastes and occasions, Rupert Ashby points out. 'The challenge now is to build on that momentum and convert strong demand into sustained value growth. One of the key constraints remains freezer space in British homes. While demand for frozen food is growing, many households are limited by the size of their domestic freezers, which naturally caps how much they can buy and store. That creates a challenge for the category, but also an opportunity. If we can continue to innovate around pack sizes, formats and meal solutions that fit more easily into everyday life, while reinforcing the value and quality story, frozen food is very well placed to play a much bigger role in the UK's food landscape,' he concludes. ■

 # 3.4%
is the year-by-year value growth of the British frozen food category.

By Bogdan Angheluta

TUTTOFOOD 2026 AIMS FOR RECORD GLOBAL ATTENDANCE

The 2026 edition of TUTTOFOOD is expected to draw more than 100,000 professional visitors, signaling a significant expansion when the exhibition takes place in Milan from May 11 to 14.

With 80% of exhibitors already confirmed — 30% of them from outside Italy — participation is expected to increase by 15–20% compared with prior editions. Positioned as Southern Europe's leading food business platform, the event has steadily expanded its international footprint. Organizers report representation from more than 70 countries for the upcoming edition, underscoring its role as a crossroads for producers, distributors and buyers across global markets. The 2025 edition marked a turning point. The exhibition drew 95,000 professional visitors from more than 100 countries, including 3,000 international top buyers, and hosted 4,200 exhibiting companies from roughly 70 countries — nearly doubling figures from earlier iterations. Among the most prominent participating nations were Spain, Poland, Germany, the United Kingdom, France, China, the US, Canada, the Netherlands and South Korea. The presence of numerous Trade Promotion Organizations further reinforced the show's standing on the European trade fair calendar. Organizers say the event's international reach has been amplified by cooperation between Fiere di Parma, which hosts the exhibition, and Koelnmesse. The partnership integrates TUTTOFOOD into a broader trade fair ecosystem that alternates with Anuga, strengthening its positioning as a global marketplace.

NEW FEATURES IN 2026

A central component of the 2026 edition will be an expanded Buyers Program developed in cooperation with Italian Trade Agency. The initiative is expected to convene more than 3,000 senior national and international professionals selected to maximize high-value business matching. Participants will include leading Italian retail chains, supermarket operators, cash-and-carry groups, discount chains and foodservice professionals representing key nodes in the distribution chain.

International buyers are expected from across Europe, the Middle East, North and South America, the ASEAN region, China, Japan, Taiwan and South Korea, with additional participation anticipated from Oceania, South Africa and Central Asia. Organizers are placing particular emphasis on the foodservice sector, targeting decision-makers from restaurant chains and hotels, while expanding focus on onboard catering to encourage cross-sector dialogue. The 2026 edition will also introduce a redesigned exhibition layout aimed at improving accessibility and product discovery. Italian and international exhibitors will be displayed side by side across 90,000 square meters of net exhibition space — 15% more than in 2025 — distributed across 10 pavilions. Two multi-level structures will anchor a packaged food hub designed to guide visitors through interconnected segments of the food industry. From dairy and deli products to frozen foods, seafood and proteins, the show will span a broad spectrum of categories, with grocery products occupying a central position across multiple halls. Organizers say the upcoming edition will spotlight emerging and relatively underexplored agri-food segments that reflect evolving global consumer trends.

Among the featured areas will be a dedicated Beverage section hosting the fifth edition of Mixology Experience, where beverage pairing serves as a unifying theme. Additional spaces will focus on innovation in fresh and processed fruit and vegetable categories. A revamped Tutto Fruit & Veg area will assemble global product categories and trends, from fourth- and fifth-range offerings to exotic produce, berries and processed goods, supported by participation from specialized industry professionals. A notable addition for 2026 is TuttoBio by Natexpo, a new pavilion dedicated to the organic segment, which continues to record strong growth across major distribution channels. Conceived as an international organic showcase, the initiative will gather certified producers from Europe and beyond. The project stems from cooperation between Fiere di Parma and SPAS, organizer of Natexpo, and is designed to combine supply-chain storytelling, product innovation and professional networking within a single platform. The exhibition experience will be rounded out by thematic spaces devoted to bakery and snacks, confectionery and coffee, highlighting the breadth and diversity of packaged food worldwide. Organizers say the streamlined configuration is intended to enhance navigation while reinforcing TUTTOFOOD's role as a central meeting point for global food commerce.

 # 100k
professional visitors are expected at TUTTOFOOD.

A NEW EUROPEAN INITIATIVE FROM TUTTOFOOD

TUTTOFOOD Milano 2026 is also introducing a new initiative aimed at reshaping how food is produced, traded and consumed. Known as the Food Manifesto, the framework is intended to address structural challenges across the agri-food sector while aligning stakeholders around long-term sustainability and competitiveness. The initiative was presented in late March at the European Parliament during the conference "European agri-food sector in an evolving geopolitical context: competitiveness and opportunities," hosted by Stefano Bonaccini and promoted by TUTTOFOOD. The event brought together policymakers, institutional representatives and industry leaders to examine how geopolitical instability and shifting global trade dynamics are reshaping Europe's food landscape. Europe's agri-food sector, a cornerstone of the region's economy, is increasingly navigating a complex environment marked by uncertainty in international markets and growing expectations around sustainability, public health and economic performance. Organizers of the Food Manifesto say the initiative is designed to move beyond incremental adjustments and instead propose a more comprehensive rethinking of the system. Developed by Fiere di Parma in collaboration with institutional and industry partners, and supported scientifically by the Future Food Institute, the manifesto calls for a shift away from what it describes as a model of "fragile abundance" toward one that balances productivity with resilience, trust and long-term value creation. The framework is intended not only as a conceptual roadmap but also as an operational platform aimed at strengthening relationships across the food supply chain. Its scope extends from consumers, who are increasingly viewing food through the lens of health and well-being, to regional economies seeking to evolve beyond subsistence models, and companies investing in environmental, social and governance strategies. At its core, the initiative seeks to align stakeholders across the value chain—including producers, processors, retailers and policymakers—around shared commitments that can be implemented and measured over time. Organizers say this coordinated approach is essential to ensuring that food demand is met while safeguarding the interests of all participants in the system. The Food Manifesto will play a central role at TUTTOFOOD 2026 in Milan, which continues to expand as a global meeting point for the food industry. By anchoring the initiative within both EU policy discussions and a major international trade platform, its backers aim to bridge the gap between political ambition and market realities, translating broad principles into concrete action across the sector. ■

 # 70
countries will be represented at the upcoming edition in Milan.

Interview By **Bogdan Angheluta**

'FROZEN FOOD IS BECOMING ONE OF THE MOST STRATEGIC CATEGORIES FOR PRIVATE LABEL GROWTH'

The private label sector is entering a new phase of development in Central and Eastern Europe, as retailers shift focus from price-led strategies to value-driven, brand-oriented propositions. With market penetration still well below Western European levels, the region represents a major growth opportunity for both retailers and manufacturers. MARCA Poland aims to position itself at the center of this transition. In this conversation, Rossano Bozzi, Business Unit Director of BolognaFiere explains how the event is structured to drive business outcomes, foster innovation and support the long-term expansion of private label across the region.

FFE: How does MARCA Poland differentiate itself from other private label trade fairs in Europe beyond its regional focus?

Rossano Bozzi, Business Unit Director, BolognaFiere: MARCA Poland is not another trade fair. It is designed as a market-making platform. Built on the experience of Marca Bologna, Europe's leading private label exhibition, it brings to Central and Eastern Europe a proven model that integrates exhibition, business matching and market intelligence into a single ecosystem. Our ambition is to establish the reference platform for private label in the region, where all key decision-makers - from top management to category managers and strategic buyers - can meet not only to negotiate, but to shape innovation roadmaps and long-term strategies. A key differentiator is the active role of retailers. Through our partnership with POHiD, the Polish Organization of Trade and Distribution, we are replicating the successful collaboration model developed in Italy with ADM. Retailers are not just attendees, but central protagonists of the event. In this sense, MARCA Poland reflects a broader transformation: private label is no longer a price alternative but it's becoming a strategic growth engine of modern retail.

What are the main barriers currently limiting private label growth in Central and Eastern Europe, despite its strong potential?

Private labels are one of the most powerful transformations shaping modern retail today. The real barrier is not demand, it is maturity. Central and Eastern Europe is entering a transition from price-driven to value-driven private label, but this shift is still at an early stage. In Poland, private label has reached a 23.5% share of the FMCG market in 2025, growing +6.6% year on year, yet still significantly below the 42% average of Western European markets. Consumer perception is evolving, but private label is still often associated with price rather than quality and brand value. At the same time, retail consolidation is still progressing across the region, limiting the scale and strategic investment needed to fully develop store brands. Yet this gap represents the opportunity. We believe Central and Eastern Europe will be the next growth engine of private label in Europe over the next five years. MARCA Poland is designed to accelerate this transition by connecting retailers ready to invest with manufacturers capable of delivering quality, innovation and differentiation.

How are retailers in Central Europe redefining private label positioning beyond price, particularly in terms of branding and premiumization?

Private label is becoming a brand strategy, not just a margin lever. Retailers across the region are reaching a strategic turning point. The 'budget alternative' model is giving way to a more sophisticated approach based on quality, segmentation and brand identity, mirroring the evolution already seen in Western Europe. Globally, private label has evolved into a consumer-focused, data-driven and highly differentiated proposition. Leading retailers in Central and Eastern Europe are now applying the same logic, investing in product quality and range architecture to build loyalty and long-term value. The presence of major players such as Lidl Polska among exhibitors at MARCA Poland 2026 clearly reflects this shift: private label is becoming a core pillar of competitive positioning.

How do you measure the concrete business outcomes of MARCA Poland for exhibitors and buyers after the event?

Success is not measured by attendance, but by the quality of partnerships created. MARCA Poland is built around a structured B2B matching platform that allows exhibitors to pre-schedule meetings with qualified buyers before the event opens, transforming the trade fair into a targeted business development opportunity. The benchmark is Marca Bologna, where over 5,000 pre-arranged meetings take place in just two days. The first edition of MARCA Poland already delivered nearly 100 exhibitors and 1000 professional visitors, confirming its relevance as a business platform for the region. The real measure of success lies in how many of these connections evolve into long-term supply partnerships across Central and Eastern Europe, and this is where we expect to see the strongest impact in the coming years.

What types of product innovation are currently gaining the most traction in private label across Central Europe?

Innovation in private label is no longer about imitation; it is about differentiation. The strongest growth is concentrated in categories where retailers can clearly express their brand identity and respond to evolving consumer needs. Functional products - such as high-protein, plant-based and free-from - are gaining significant traction. In Italy, for example, functional private label grew by over 18% in value in 2025, a performance that retailers in Central and Eastern Europe are actively looking to replicate. At the same time, we are seeing a growing opportunity to elevate private label through authentic food propositions. Retailers are increasingly looking to enrich their assortments with products that carry a strong heritage, clear origin and recognisable quality standards, areas where Italian food excellence represents a natural benchmark. At MARCA Poland, this will be reflected in the presence of companies such as Pizzoli (potato specialties), Caffè Barbaro (coffee) and Deanocciola (hazelnut products), showcasing how authentic Italian products can become a powerful lever to upgrade private label from a price-driven offer to a value-driven, brand-building proposition. At the same time, this innovation dynamic is not limited to food. Private label is increasingly expanding into non-food categories, where retailers can further strengthen brand identity and margin structure, confirming its role as a strategic business model across the entire retail value chain. MARCA Poland 2026 will bring this innovation agenda to life through the MARCA Awards, presenting 15 finalists selected from over 300 products at the Bologna edition, across categories such as product origin, wellbeing, sustainability and supply chain transparency.

How is the frozen food segment evolving within private label in Central and Eastern Europe, and what opportunities does it present for manufacturers?

Frozen food is becoming one of the most strategic categories for private label growth. It sits at the intersection of three major consumer needs: convenience, quality and value. As lifestyles become increasingly time-constrained, demand for ready-to-cook and ready-to-heat solutions continues to grow. At the same time, the category is evolving beyond basic staples, with increasing interest in premium segments such as ready meals, seafood and bakery, areas where private label still has significant room to expand. We expect frozen to be one of the fastest-growing private label categories in Central and Eastern Europe over the coming years, creating strong opportunities for manufacturers able to combine product excellence, innovation and supply chain transparency.

What innovations in frozen food - such as convenience, sustainability, or product quality - are you expecting to see highlighted at MARCA Poland?

The most relevant innovations today are those that eliminate the trade-off between convenience and quality. Consumers increasingly expect products that are quick to prepare but also deliver on taste, nutrition and authenticity, pushing both retailers and manufacturers to rethink the role of frozen food within private label. This evolution will be clearly visible at MARCA Poland, where leading manufacturers are already showcasing solutions aligned with these new consumption habits. For example, companies such as Roncadin (frozen pizza) are introducing products specifically designed for air fryer cooking, combining speed, ease of use and product excellence. Alongside convenience, sustainability and transparency are emerging as key innovation drivers. Retailers and producers are investing in eco-friendly packaging, cleaner formulations and supply chain visibility to strengthen consumer trust and brand identity. What we are seeing is a shift in the category: frozen food is no longer just about preservation; it is becoming a platform for innovation, where technology, quality and brand positioning play a central role in redefining the category. ■

Fair Preview

By **Bogdan Angheluta**

PLMA PREPARES FOR 2026 GLOBAL GATHERING IN AMSTERDAM

The Private Label Manufacturers Association will convene its 39th annual World of Private Label International Trade Show on May 19–20, 2026, at the RAI Amsterdam Convention Centre, bringing together thousands of companies in what has become one of the most influential events in the global store-brand industry.

Organizers expect more than 3,200 exhibitors—both new and returning—from over 75 countries, underscoring the continued expansion and internationalization of private label manufacturing.
New national pavilions from Brazil, Egypt, Poland, South Korea and Vietnam will join the exhibition floor this year, reflecting the sector's widening geographic reach and the growing role of emerging markets in product development and sourcing. Participants will showcase the latest food and non-food innovations, with an emphasis on quality improvements, product development and cross-border partnerships shaping the next phase of private label growth. A central attraction of the 2026 show will be the Idea Supermarket, PLMA's Innovation and Trends Area, which is relocating to the RAI Auditorium. The redesigned space features a modern layout, multiple access points and improved visitor circulation intended to help buyers more easily identify emerging consumer trends and product opportunities. The event's pre-show seminar program will begin Monday, May 18, with Spanish retailer EROSKI offering perspectives on private label strategy, innovation, sustainability and strategic partnerships. Additional workshops focusing on packaging and collaboration between retailers and manufacturers are expected to frame the discussions ahead of two days dedicated to sourcing, networking and industry growth.

PRIVATE LABEL SHARE GROWING RAPIDLY

The gathering arrives at a moment of notable momentum for store brands across Europe. According to NielsenIQ data compiled for PLMA's Private Label Market Report, the private label share across 17 European countries reached 38.8% in the MAT W52 2025 period, an increase of 0.33% from a year earlier. Twelve of the 17 markets recorded gains, and private label penetration now exceeds 30% in twelve countries, with eight surpassing the 40% threshold. Switzerland remains the most mature market, where private label products account for 52.3% of sales, representing more than EUR14 billion and making it the only country in the survey above the 50% mark. Some of the strongest year-over-year increases were recorded in Spain, where share rose by 1.1%, followed by Austria with 0.9%, Portugal with 0.7% and the Netherlands with 0.5%. In Europe's three largest markets—Germany, the UK and France—private label reached a combined share of 40.4%, an increase of 0.3%, with particularly strong performance in confectionery and snacks as well as perishable food categories. Across the 17 countries studied, the leading growth segments are confectionery and snacks, perishable food and ambient food, which together represent roughly EUR258bn in sales. Overall, private label sales across these markets increased by EUR15.3bn, bringing the total to more than EUR387bn in value. As retailers continue to invest in their own brands and manufacturers expand partnerships across borders, the Amsterdam event is set to provide a snapshot of an industry that is steadily gaining ground across Europe and beyond. ■

 # 38.8%
was the private label share across 17 European countries (NielsenIQ, MAT W52 2025 period).

SVILA PRESENTS NEW RECIPES

Svila Srl will unveil its "Pizza alla Pala" newest recipes at Tuttofood 2026 in Milan. The proportion between the topping and the dough was rebalanced to enhance the tasty ingredients of the topping and at the same time the crispness and flavor of the dough. The new recipes are "Salame e Salsiccia" for meat lovers, and "Parmigiana" for vegetable lovers. All Svila's products are made with 100% Italian wheat and tomatoes.

https://www.svila.com

FROSTKRONE SHOWCASES NEW FINGER FOOD VARIETIES

Frostkrone Food Group recently showcased their new Cheesy Loops (14g each), instantly recognisable thanks to their playful ring shape. Weighing in at just 14g each, Cheesy Loops are smaller and more refined than traditional frozen snacks – ideal for modern, flexible menus. Amsterdam Cheese Bites proved just as irresistible, drawing strong interest throughout the show. Golden and crisp on the outside, irresistibly creamy within and delicately finished with parsley, each bite delivers a rich, full-bodied flavour with a truly premium feel.

https://frostkrone-foodgroup.com/

BIRDS EYE EXPANDS STEAMFRESH RANGE

Birds Eye is expanding its Steamfresh range with four globally inspired additions. The new products—Korean Style Noodles, Malaysian Laksa Style Noodles, Asian Rice and Mexican Rice—aim to bring bolder international flavors to the frozen aisle while meeting growing expectations around health and ease of preparation. The new products—Korean Style Noodles, Malaysian Laksa Style Noodles, Asian Rice and Mexican Rice—aim to bring bolder international flavors to the frozen aisle while meeting growing expectations around health and ease of preparation.

https://www.birdseye.com/

REDEFINE MEAT UNVEILS NEW PLANT-BASED FLANK STEAK

Redefine Meat, a company known for developing premium plant-based meat alternatives, introduced the next generation of its flagship flank steak, aiming to push further into the fast-growing category of high-end meat substitutes. The new version of its plant-based Redefine Flank Steak is designed to deliver a richer flavor, improved juiciness and a more steak-like texture, targeting meat eaters, vegetarians and vegans alike.

https://www.redefinemeat.com/

WEINBERGMAIER LAUNCHES BAUERNLAND SPELT AND BROCCOLI STRUDEL MINIS

Weinbergmaier has introduced a new addition to its Bauernland line with the launch of Spelt and Broccoli Strudel Minis, a product designed to meet the growing demand for flexible portions, vegetarian options and lighter ingredients in contemporary food service. The small, crispy strudels combine thin layers of traditional dough with a vegetable-forward filling, reflecting the shift among restaurants and catering providers toward menu items that balance convenience, nutrition and flavor.

https://www.weinbergmaier.at

TENDERSTEM REFRESHES FROZEN RANGE WITH NEW BRANDING PUSH

Tenderstem has relaunched its frozen product range with updated branding and packaging, seeking to capitalize on growing consumer demand for convenient foods that help reduce household food waste. The relaunch also introduces the frozen range to the brand's recently updated visual identity. The new packaging aims to strengthen the brand's premium positioning and improve shelf visibility while maintaining the recognizable elements that have helped Tenderstem secure a consistent place in shopping baskets across the UK.

https://www.tenderstem.co.za/

NATURAL GROCERS RELEASE ORGANIC FROZEN RAVIOLI

Natural Grocers, the largest family-operated natural and organic grocery retailer in the United States, is expanding its private label portfolio with the introduction of Organic Frozen Ravioli. The new lineup includes four varieties packaged in 20-ounce bags and available exclusively at Natural Grocers stores. The offerings include Organic Ricotta & Mushroom Ravioli, Organic Mozzarella & Cherry Tomato Ravioli, Organic Eggplant & Provolone Ravioli and Organic Butternut Squash Ravioli.

https://www.naturalgrocers.com

HÄAGEN-DAZS DEBUTS LIMITED-TIME DARK CHERRY TRUFFLE COLLECTION

Häagen-Dazs Shops is betting on the growing appeal of dark cherry, introducing a limited-time collection that pairs the fruit's tart profile with rich chocolate in an effort to elevate its in-store dessert experience. The collection centers on a combination of bright, tangy cherry notes and deeper chocolate elements, a pairing the company positions as both indulgent and balanced. Among the offerings is the Dark Cherry Truffle Ice Cream, which blends cherry vanilla ice cream with tart cherry ribbons and soft cocoa truffles.

https://www.icecream.com/us/en/brands/haagen-dazs/shops

MORINAGA MOVES INTO FROZEN DESSERTS WITH ACQUISITION OF MY/MOCHI

Morinaga & Co., Ltd., the parent company of Morinaga America, Inc. and a global confectionery manufacturer, said it has reached a definitive agreement to acquire My/Mochi Ice Cream, the largest mochi ice cream brand in the US. The deal brings together two companies with long-standing brand heritage, category expertise, and complementary capabilities, a combination the companies say will help shape the future of snacking in the US.

https://www.mymochi.com

HIGH LINER FOODS LAUNCHES SEA CUISINE SKILLET MEALS

High Liner Foods Incorporated has introduced a new line of Sea Cuisine Skillet Meals, unveiling the products at Seafood Expo North America. The new lineup features chef-crafted recipes built around responsibly sourced seafood and globally inspired flavors. Designed for home cooks seeking quick meal solutions, the products can be prepared in a single pan and are ready in about 15 minutes. The meals combine seafood with vegetables, grains or pasta to deliver balanced dishes that emphasize both flavor and protein content.

https://www.highlinerfoods.com/

TEM TOA AIMS TO BRING AUTHENTIC THAI CUISINE TO THE FROZEN AISLE

A new brand focused exclusively on Thai cuisine is preparing to enter the US frozen food market, seeking to address what its creators see as a long-standing gap in authentic, restaurant-style Thai meals that can be prepared at home in minutes. Tem Toa was developed by the team behind Deep Indian Kitchen and will operate under Deep Brands, a newly formed family of food brands dedicated to expanding consumer access to global flavors. The company plans to introduce four frozen entrées at launch, with products set to appear exclusively in Target stores across the US beginning April.

https://www.temtoathai.com

COLD STONE CREAMERY INTRODUCES DUBAI-INSPIRED CHOCOLATE

Cold Stone Creamery is leaning into globally inspired flavors with the launch of a limited-time dessert designed to capture the richness and visual appeal of Middle Eastern confections. The new "Our Dubai Chocolate Creation" reflects a growing trend in the US dessert market, where international influences and social media-driven food trends are increasingly shaping product innovation. The offering combines chocolate ice cream with pistachio cream, kataifi and chocolate shavings, drawing on flavor profiles commonly associated with upscale desserts from the Gulf region.

https://www.coldstonecreamery.com/

EDITORIAL PLAN 2026

1 JANUARY/FEBRUARY
Ad closing 23.01
Publishing 06.02

CFIA, GULFOOD, FOODEX JAPAN SPECIAL EDITION

Frozen Pasta for Catering and Foodservice
product innovation, manufacturers, suppliers
Bakery and Pastry
key market players, producers, suppliers
Crispy Veggie Appetizers & Snacks
battered and coated products for the food industry
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 & roboting
Nutrition & Ingredients
for frozen bakery and potato products
Frozen Food in Germany
recent developments, review, estimates
Trade fairs: INTERGASTRA Stuttgart, GULFOOD Dubai, BIOFACH Nurnberg, CFIA Rennes, FOODEX JAPAN Tokio, INTERNORGA, FOODEXPO Greece, IFE London, SNACK SHOW - PARIZZA Paris

2 MARCH/APRIL
Ad closing 27.03
Publishing 10.04

INTERPACK, TUTTOFOOD, PLMA 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
Interpack and TUTTOFOOD 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: INTERPACK Dusseldorf, TUTTOFOOD Milano, NRA Chicago, PLMA Amsterdam, SEAFOOD PROCESSING GLOBAL Barcelona, IDDBA Orlando

3 MAY/JUNE
Ad closing 22.05
Publishing 05.06

Frozen Food from Italy
market overview for retail and foodservice
Frozen Pasta & Noodles
trends, new product development, producers, suppliers
Frozen Pizza Market
major producers, suppliers, country breakdown
Technology and Innovation for Frozen Pizza
processing machines, toppings, portioning and forming
Ingredients for the Foodservice Industry
herbs & mixed herbs, rice, noodles, vegetables, processed meat, and sauces
Frozen Finger Food, Fried & Baked Products
trends and successful products
Frozen Burgers
new products, producers and suppliers
Frozen Snacks and Pastry
innovative products for retail and foodservice
Optical Sorting Technology
innovation and latest equipment
Deep Freezing Technologies, Proofing, Baking, Cooling
for bakery applications
Frozen Food in the US
evolution, challenges, opportunities & major players
Trade fairs: SNACKEX Lisbon, SUMMER FANCY FOOD New York

4 JULY/AUGUST
Ad closing 24.07
Publishing 07.08

SIAL, POTATO EUROPE SPECIAL EDITION

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: SIAL Paris, POTATO EUROPE Hannover

5 SEPTEMBER/OCTOBER
Ad closing 18.09
Publishing02.10

SIAL, INTERPOM, CIBUS TEC SPECIAL EDITION

Key Exhibitors Road Map and Events Agenda
SIAL and INTERPOM Preview/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: SIAL Paris, CIBUS TEC Parma, SUDBACK Stuttgart, INTERPOM Kortrijk, PLMA Ghicago, GULFOOD MANUFACTURING Dubai, PACK EXPO Las Vegas, PACK EXPO INTERNATIONAL Chicago

6 NOVEMBER/DECEMBER
Ad closing 20.11
Publishing 04.12

GULFOOD, FRUIT LOGISTICA, MARCA SPECIAL EDITION

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: SIGEP Rimini 2027, MARCA Bologna 2027, FRUIT LOGISTICA Berlin 2027, GULFOOD Dubai 2027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