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Content

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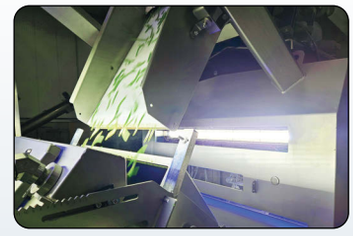
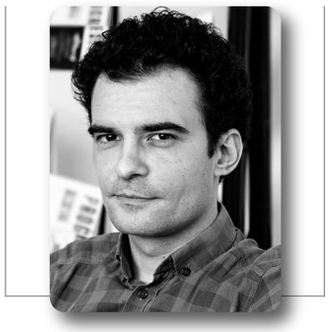
REGULARS

FEATURES



By **Bogdan Angheluta,**
Editor in Chief



THE FROZEN AISLE IS BECOMING THE MOST INNOVATIVE PART OF THE STORE

Innovation in grocery retail may often be associated with perimeter departments, seasonal displays, or different launches and activations. However, more and more innovations seem to be found in the frozen aisle. This might be connected to the fact that the frozen food industry has become a sort of laboratory for product development, driven by fewer constraints than fresh categories and a distribution model that supports longer testing cycles. Without the same pressure of immediate spoilage or daily production, manufacturers can experiment more freely with formats, flavors, and fusion concepts that would be difficult to sustain elsewhere in the store. It must be said that regional and international flavor profiles that once required restaurant execution are now being adapted into scalable frozen formats, and as the category turns into a bridge between foodservice and home consumption, translating culinary movements into accessible products is something that drives more interest from consumers and therefore sales. Unlike freshly prepared foods, frozen doesn't depend on labor availability at the point of sale. That separation between production and consumption allows for greater consistency and scalability while also reducing operational friction, which in turn encourages risk-taking in product design. Private label development has, too, reinforced this dynamic, as retailers often use frozen as a testing ground for premium products and experimental concepts before expanding those successful into a broader assortment. As previously noted, while fresh innovations can be limited by shelf life and daily production logistics, frozen foods can be refined over longer development timelines and rolled out with fewer constraints. Perhaps most importantly, frozen sits at the intersection of multiple food trends at once. It absorbs demand for higher protein, global flavors, plant-based options, and convenience in a single channel, and there aren't many other grocery categories that can integrate such a wide range of consumer preferences. What's your take on this? Let me know at **bogdan.angheluta@trade.media**. ■

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EUROPE

SPANISH GELATO MAKER TOPS GLOBAL RANKING

The latest edition of the Gelato Festival World Ranking underscored the increasingly global nature of the artisanal gelato industry, with top honors going to gelato makers working across Europe and the US as the sector continues evolving beyond its Italian roots. The 2026 ranking, unveiled in Rome at the headquarters of the Foreign Press Association in Italy at Palazzo Grazioli, named Carlo Guerriero of La Cremeria Gelato Italiano in Cádiz, Spain, as the world's leading artisanal gelato maker.

US

THE LITTLE POTATO COMPANY EXPANDS FOODSERVICE FOCUS

The Little Potato Company has launched a dedicated foodservice division as it looks to strengthen its support for operators across restaurant, retail, hospitality and institutional channels. The Edmonton-based company said this will provide added resources, visibility and expertise for the foodservice channel, supporting operators that are dealing with labor pressure, rising costs and demand for consistent fresh ingredients. The division will initially focus on limited and full-service restaurants, retail and hospitality, with additional emphasis on healthcare, education and other segments over time.

GLOBAL

ALTERNATIVE PROTEIN SECTOR SHOWS SIGNS OF RECOVERY DESPITE UNEVEN CONSUMER DEMAND

New reports from the Good Food Institute suggest segments of the alternative protein industry are regaining momentum following a challenging period marked by slowing sales growth, investor caution and questions around consumer adoption. The organization's annual State of the Industry series, released last month, examines developments across the plant-based, fermentation-derived and cultivated meat sectors, covering areas including consumer behavior, investment trends, scientific progress and regulatory developments. The series also includes a review of global policy initiatives and public-sector investment tied to alternative proteins. In the plant-based category, US retail sales of plant-based meat and seafood products declined in 2025, continuing pressure on a segment that expanded rapidly earlier in the decade. Still, the reports indicate the long-term market opportunity remains substantial, particularly among younger and health-conscious consumers. According to the analysis, nearly three in four US consumers from Generation Z through Generation X remain open to plant-based foods. Health-focused consumers also spend 56% more annually on plant-based meat products than the average shopper, suggesting the category retains a core audience despite softer overall sales. The report estimates that doubling purchase frequency among existing consumers—equivalent to eating plant-based meat roughly once a week—could generate an additional USD1bn in annual sales. Globally, retail sales of plant-based meat and seafood products reached USD6.6bn in 2025, according to Euromonitor data cited in the report, representing approximately 8% growth from the previous year. Europe accounted for much of the expansion, while the US remained the single largest national market, representing nearly one-quarter of global sales. The fermentation segment also showed signs of commercial progress, particularly in products developed through precision fermentation technology. Several new retail launches emerged in 2025, including an egg-white protein powder introduced at Walmart and dairy products launched in Israel.

EUROPE

PACKAGING REMAINS CRITICAL TO LOYALTY AS AI RESHAPES ONLINE SHOPPING

Mondi has published its annual eCommerce Trend Report 2026, arguing that packaging remains a decisive part of the online shopping experience even as artificial intelligence becomes more embedded in digital retail. The report is based on an online survey of 6,000 consumers across Europe and Türkiye, alongside expert interviews. According to Mondi, 60% of consumers now use AI tools during their shopping journey, while more than half are willing to let AI make purchasing decisions on their behalf. However, the physical delivery experience continues to influence customer retention. Mondi said 67% of consumers report that packaging affects the unboxing experience and encourages repeat purchases, while 72% would avoid buying again from a retailer because of oversized packaging. Product protection remains the strongest expectation. The research found that 98% of consumers rank protection as their top priority for eCommerce packaging, while 86% expect packaging to be sustainable.

US

WENDY'S NAMES ROBERT D. "BOB" WRIGHT AS CEO

Wendy's Co. said its board of directors has appointed Robert D. "Bob" Wright as president and CEO, effective 21 May 2026, marking a leadership change as the quick-service restaurant chain continues its turnaround efforts and focuses on operational performance and digital growth. The appointment brings back a longtime industry executive with extensive experience in restaurant operations and brand development. Most recently, Wright served as president and chief executive officer of Potbelly Corp., where he oversaw a period of expansion.

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ASIA

CATHAY CARGO EXPANDS COLD-CHAIN LOGISTICS NETWORK

Cathay Cargo is expanding its cold-chain logistics capabilities as demand grows for faster and more tightly controlled transportation of temperature-sensitive goods, positioning Hong Kong as a strategic gateway for regional and global trade. The company said its integrated cold-chain offering combines its Cathay Fresh and Pharma services to support shipments ranging from perishable foods to pharmaceutical products. The expansion is intended to strengthen Hong Kong's role as a logistics hub for the Greater Bay Area and international markets.

US

NUTELLA ENTERS THE FROZEN AISLE

Wells Enterprises announced the national launch of Nutella Ice Cream, a new frozen product line built around the hazelnut-cocoa spread that has become a pantry staple for millions of American households. The rollout marks the first time the Nutella flavor has been adapted into a standalone ice cream product, now appearing in freezer cases at retailers across the country. The line comes in two formats: A 14-fluid-ounce container that offers a multi-textured product featuring layers and swirls of Nutella and a single-serve cone option that pairs the hazelnut-cocoa flavor with a crispy wafer .

GLOBAL

FROZEN READY MEALS MARKET DRIVEN BY CONVENIENCE DEMAND

The global frozen ready meals market is on track for a decade of steady growth, according to new analysis from Future Market Insights, as shifting consumption habits and urbanization continue to drive demand for quick, accessible meal options. The market was valued at USD89.2bn in 2026 and is projected to reach USD134.7bn by 2036, representing a compound annual growth rate of 4.2% over the forecast period. The figures reflect a broader repositioning of frozen meals within the food industry — products that once occupied the lower end of the convenience category are increasingly competing on quality, nutritional value and premiumization. Dinner entrees account for the largest share of the market at 38.5%, while retail supermarkets remain the dominant distribution channel, capturing 45.8% of sales. The category's reach has nonetheless expanded well beyond traditional grocery aisles, with frozen ready meals now widely available through convenience stores and online retail platforms, deepening their presence across both household and foodservice consumption. In terms of regional momentum, India, the US, Germany, Japan and the UK are identified as the fastest-growing markets, reflecting how the category is gaining ground across diverse economic and dietary contexts. Rising urbanization and increasingly time-pressed lifestyles are cited as primary demand drivers across these geographies, alongside growing consumer expectations for products that deliver both convenience and nutritional credibility. The findings suggest that frozen food manufacturers and retailers willing to invest in product development and premiumization are well-positioned to capture a disproportionate share of that expansion over the coming decade.

ITALY

TUTTOFOOD REPORTS RECORD ATTENDANCE AS INTERNATIONAL FOOD TRADE EXPANDS

TUTTOFOOD 2026 closed its 2026 edition with record attendance, underscoring growing international demand for Italian and global food products despite mounting geopolitical and economic pressures. The trade fair, organized for the second consecutive year by Fiere di Parma, attracted 123,000 attendees over four days, including 27,000 international visitors, marking a 30% increase from the 2025 edition. Organizers said the turnout reflected rising interest from food manufacturers, distributors, foodservice operators, importers and buyers seeking new commercial partnerships and expanded market access. Held in partnership with Fiera Milano and supported internationally by Koelnmesse, organizer of Anuga, the event occupied 10 exhibition halls spanning 82,000 square meters, all fully booked. Exhibition space increased 15% from the prior year, while the number of participating brands rose 20% to 5,000, roughly 30% of which came from outside Italy. The event also hosted 4,000 international buyers.

US

ROCKWELL DEPLOY AI SYSTEM TO CUT REFRIGERATION ENERGY COSTS

Rockwell Automation and industrial services firm Actemium have deployed an artificial intelligence application that reduces energy consumption in industrial refrigeration systems by 17%, according to the companies. The solution, already in use at a large frozen french fry producer, is generating an estimated USD130,000 in annual savings per facility. The technology, developed by Actemium and branded as Real-Time Coefficient of Performance, or RtCOP, runs on Rockwell Automation's PlantPAx distributed control system.

GLOBAL

FOODSERVICE AND CONVENIENCE TRENDS RESHAPE GLOBAL CONSUMER SPENDING

New market projections from Mordor Intelligence point to continued expansion across global foodservice and convenience-driven food categories, as consumers increasingly prioritize affordability, speed and digital accessibility in their purchasing decisions. The research firm estimates the European foodservice market will reach USD1.04tn in 2026, while India's foodservice sector is projected at USD93.97bn and the UAE market at USD27.28bn. Globally, the quick-service restaurant sector is forecast to grow to USD1.16tn. According to the reports, the growth reflects a broader shift in consumer spending toward formats that combine convenience, digital access and stronger value perception, rather than a simple increase in dining out activity. Demand across food categories is also becoming more dependent on format and functionality. Snack products are increasingly serving as meal replacements, while frozen food categories continue to benefit from consumer demand for convenience paired with nutritional value. Dairy, bakery and ice cream producers are simultaneously expanding premium and functional product offerings. Within foodservice, operators are increasingly competing on operational efficiency, menu optimization, off-premise consumption and digital ordering capabilities rather than relying solely on physical expansion. Industry forecasts for 2026 suggest restaurant chains are placing renewed emphasis on affordability and familiarity as consumers remain cautious about discretionary spending. Value-oriented menu strategies, comfort foods and globally influenced formats are expected to remain among the strongest drivers of customer traffic. The reports also indicate that convenience is extending beyond traditional takeaway channels. Prepared meals, frozen foods and quick-service restaurant formats are increasingly converging around consumer demand for faster access to food without sacrificing taste, nutritional quality or consistency.

ITALY

APPETAIS GROUP WINS RECOGNITION AT MILAN FOOD FAIR FOR SHRIMP SAUCE PRODUCT

Appetais Group took third place in the Product Innovation category for ready-made sauces at the Better Future Award 2026, an international food innovation competition held during TUTTOFOOD Milano at the Fiera Milano Rho exhibition center in Italy. Appetais Group's "Sughetto ai Gamberi" — a ready-made shrimp sauce — was among the products that advanced through that process, earning the company a podium finish in one of the competition's most competitive categories.

GLOBAL

TNA UNVEILS ROBAG QUANTUM

TNA Solutions has used interpack 2026 to introduce the tna robag Quantum, a next-generation vertical form-fill-seal (VFFS) platform designed to help snack and food manufacturers increase output while reducing overall line complexity. Positioned as the latest evolution of the company's robag platform, first launched in 1982, the new system is aimed at processors facing mounting pressure from labour shortages, rising operating costs, product proliferation and the shift toward smaller pack formats and multipacks.

GLOBAL

CRESPEL & DEITERS ADVANCES PLANT-BASED FORMULATION WITH PEA PROTEIN

Crespel & Deiters is expanding its role in the plant-based ingredients market with a focus on pea protein as a functional, texturized component in meat or fish alternatives. As demand grows for products that replicate the texture and nutritional profile of animal-based foods, the company is positioning its Lory Tex Granules as a solution tailored to modern formulation requirements. In the development of plant-based alternatives, wheat and pea protein have emerged as two of the most widely used inputs.

CENTRAL ASIA

ROHLIG SUUS LOGISTICS EXPANDS INTO UZBEKISTAN

Rohlig SUUS Logistics has opened a subsidiary in Uzbekistan, expanding its presence in Central Asia as companies increasingly look to diversify supply chains and improve operational resilience amid geopolitical uncertainty. The new entity, based in Tashkent, will provide a range of logistics services including international road transport, domestic distribution, sea, rail and air freight, intermodal transport, warehousing and customs brokerage. The company said the operation will combine local expertise with support from the broader Röhlig global network and regional partners. The move follows the company's earlier expansion into Kazakhstan and reflects growing interest in Central Asia as an alternative trade and logistics corridor for companies adapting to shifting geopolitical and supply-chain dynamics. Rohlig SUUS Logistics, which originated in Poland, has continued expanding across the Central and Eastern European and Central Asian region.

By **Bogdan Angheluta**

FROZEN PIZZA INDUSTRY ENTERS NEW GROWTH PHASE

The global market for frozen pizza is evolving as a result of broad trends in consumer behavior and innovation in the food industry. Until recently, frozen pizza was viewed primarily as a convenient meal option, however, as consumers demand premium ingredients, more nutritious options, and restaurant-quality experiences at home, it has become a much more sophisticated category.

A variety of factors are contributing to this growth. The changes in lifestyles of consumers have provided opportunities for companies who offer quick meal solutions that do not sacrifice quality. Additionally, with manufacturers responding to expectations regarding nutrition, authenticity, and convenience; the category is currently attracting a larger segment of the population than ever before. The numbers supporting this growth are significant. Research cited by Italian Food News indicated that revenue from frozen pizzas globally was approximately USD20.4bn in 2023 and will exceed USD30.8bn by 2029. Further expansion is expected through 2033. Of course, there are several factors that contribute to the robust growth in the market. Consumers are continuing to seek convenient meals due to their increasingly busy schedules, while advances in freezing technology, packaging, and food preservation have improved product quality and helped narrow the gap between products prepared fresh and those prepared using freezing methods. Finally, the availability of a wider range of specialized and premium products within the category has strengthened its appeal to consumers.

NEW CONSUMER HABITS

Additionally, consumer preferences are changing. Health and wellness considerations now play a bigger role in purchasing decisions, thus prompting manufacturers to reformulate their products and introduce new varieties. Examples offered by Italian Food News include whole grain crusts, alternative flour crusts, low-sodium formulas, clean label ingredients, and sustainably sourced toppings. Plus, companies are also emphasizing transparency as clear labeling of ingredients and nutritional information can help build trust among consumers. One trend that is creating additional opportunities in the sector is the shift toward plant-based eating. Although traditional meat-based pizzas continue to represent the largest share of sales, there is steadily rising demand for vegetarian and plant-based alternatives. As interest in sustainable diets continues to grow, so does interest in meat substitutes. Consequently, manufacturers are expanding their portfolios to target flexitarians (consumers who identify themselves as both omnivores and vegetarians) and individuals seeking to reduce meat consumption without eliminating it altogether. Another trend reshaping the market is the growing demand for protein-rich foods. To address this demand, frozen pizza manufacturers are including high-protein toppings such as chickpeas, lentils, cheese enriched with proteins, lean meats or seafood. These products were designed to meet the needs of active, healthy-living consumers looking for convenient meals.

PREMIUM SEGMENT IS THE NEW BATTLEGROUND

Without question the most important development in recent years has been the premiumization of the category, Italian Food News mentions.

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Consumers are increasingly expecting the same level of quality and authenticity when consuming frozen pizza that they would experience when dining out at restaurants. As a response to these demands, manufacturers are focusing on providing traditional italian recipes, slow-fermented doughs, premium cheeses, cured meats, genuine tomato varieties, artisan production techniques and other attributes that provide evidence of their commitment to delivering authentic flavors and culinary heritage to consumers. While classic varities such as Margherita, Marinara, Quattro Formaggi, Diavola and Capricciosa remain popular among consumers seeking authentic flavors and culinary heritage, many shoppers value premium frozen pizza options because

it provides them with a cost-efficient way to recreate a restaurant style dinning experience at home. Manufacturers' innovation is extending beyond quality and authenticity into flavor experimentation. Chili peppers, spicy salamis and regional italian specialties are being used in hotter recipes. Similarly, regional pizzeria styles and gourmet flavor combinations are captivating consumers interested in exploring different types of cuisine. Finally, specialty crust formats such as Neapolitan, Roman, Detroit style and tavern style pizzas are becoming more popular as consumers look for more variety in the frozen food aisle.

EVEN ESTABLISHED CATEGORIES FACE HURDLES

Although the outlook appears favorable for the industry, there are challenges ahead. Some consumers still express concern over sodium content and preservatives used in manufactured products. Competition from meal kit providers and online food delivery platforms is intensifying. Furthermore, increases in raw material costs and transportation costs are causing pressure on manufacturers to keep prices down. Therefore, success will be determined by each company's ability to innovate while maintaining quality and value. The frozen pizza category can be described today as a competitive marketplace where the consumer has options. With the increasing demand for better tasting, healthier and authentic products from consumers; companies will need to find ways to innovate within the space and at the same time provide a high level of quality and convenience. Manufacturers that are able to effectively integrate these three attributes into their product will have the greatest opportunity to capture market share and become the leaders in this category.

FOODSERVICE INDUSTRY SHIFTS FOCUS FROM SPEED TO EXECUTION

Speed has been the primary focus of the pizza business for decades, especially when it comes to specialized foodservice operators. But now, that model isn't enough; we're shifting our focus from speed to execution. What this means is that we will have to be better at getting the right orders out in a timely manner; better at providing transparent information to customers about what they ordered and when it will be delivered; and better at meeting the promises made during the ordering process. Technology; changing consumer behaviors; and increased competition in an already-competitive category are driving these changes. A study done by In Touch Insights on behalf of the National Restaurant Association (NRA) indicates that there has been a significant shift in how consumers evaluate their experience when ordering pizza. Although speed is still an important consideration for consumers, customers are looking at a variety of metrics to determine their satisfaction. They still expect hot pizza delivered quickly, but they are also interested in whether 'the experience unfolded as presented.' One of the biggest takeaways from the study is that delivering food quickly does not necessarily mean you will deliver satisfying food. Reliability seems to be becoming the KPI (Key Performance Indicator) for determining customer satisfaction. Satisfied customers experienced a nearly 50-point increase in overall satisfaction ratings vs. those customers who were dissatisfied. However, the data showed that once delivery time exceeded approximately 40 minutes, there was a dramatic drop in satisfaction rates, especially when actual delivery times exceeded those provided in the estimate. Technology is beginning to emerge as a clear differentiator. Live tracking of orders created a huge correlation between the estimated delivery time and the actual delivery time, further emphasizing the importance of transparency within the customer experience. Although perfect timing may seem like the ultimate goal, according to the study, even perfect timing will not result in a positive experience if the quality of your food is poor. Food quality was determined to be the number-one factor influencing overall customer satisfaction, beating out speed, convenience, and accuracy. Customers seemed to be more forgiving of longer wait times than poor-tasting/cold pizzas. Order accuracy continues to be another area of battle among competitors. A recent study completed by In Touch Insights found that 30% of surveyed consumers identified accuracy as their most important factor when ordering pizza for delivery; second only to receiving food hot. While accuracy rates remained high across the board in terms of total industry accuracy; restaurant operators are being forced to rely on automation to create consistency due to increasing labor shortages and rising labor costs. However, the results show a trade-off. While automated ordering systems greatly increased accuracy, customer satisfaction decreased when orders were completely processed via technology instead of employees. This shows that companies may see increased productivity with automated systems, but doing so may cost them customer loyalty through reduced human interaction. ■

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Interview

Matteo Palermo, Executive Vice President, Marketing and Special Operations, Svila S.R.L./Divine Pasta Co.

FROM REGIONAL HERITAGE TO GLOBAL RETAIL

In a retail market where shoppers increasingly demand both gourmet quality and everyday convenience, frozen pizza manufacturer Svila is proving that modern innovation doesn't have to mean sacrificing time-honored tradition. By expanding into versatile formats and committing to clean-label ingredients, the brand successfully balances its deep Italian roots with the expectations of global consumers. In this interview, we explore how Svila leverages advanced production technology, adheres to rigorous international safety standards, and positions its authentic regional heritage to drive sustainable growth across Europe and beyond.

How has Svila's product portfolio evolved in recent years to meet changing customer expectations?

Svila's product portfolio has evolved significantly in response to shifting consumer preferences and the growing demands of the retail market. While remaining deeply rooted in authentic Italian pizza tradition, we have expanded our range to include more versatile formats, premium recipes, and solutions tailored to modern dining trends. Today, our assortment includes thin-crust pizzas, pizza alla pala, and many other gourmet selections designed to satisfy consumers seeking both convenience and elevated quality. This evolution reflects our commitment to innovation while preserving the artisanal character that distinguishes the Svila brand. We continue to invest in product quality and innovation to better respond to the needs of our regional and international customers.

Could you highlight a few recent product launches or innovations that you're particularly excited about?

We have expanded our pizza alla pala range, which combines traditional Italian culinary craftsmanship with the convenience required by today's consumers. These innovations showcase our focus on balancing authenticity, convenience, and evolving consumer tastes. We are particularly encouraged by the positive response these products have received from clients looking for premium-quality solutions that are also practical and easy to prepare at home.

How does Svila collaborate with chefs or partners to co-develop or refine products?

Collaboration is an important part of our product development process. We actively gather feedback from partners regarding flavor profiles, preparation requirements, packaging, and overall product performance. This ongoing dialogue allows us to refine recipes, optimize formats, and ensure our products meet the practical and culinary expectations of the market. Through this collaborative approach, we are able to remain closely connected to evolving market trends and consumer preferences.

What role does innovation - whether in ingredients, production technology, or formats - play in staying competitive?

Innovation is central to Svila's strategy and long-term competitiveness in the frozen pizza sector. We continuously reinvest in advanced production technologies and research to improve product quality, consistency, and efficiency. It is fundamental to continue improving while prioritizing innovation. This continuous focus on development allows us to maintain high standards while adapting to the changing expectations of consumers and retail markets internationally.

What certifications or quality standards does Svila adhere to in order to guarantee food safety and compliance?

Svila operates according to strict international food safety and quality standards. We hold recognized certifications, including IFS and BRC, which ensure compliance with rigorous industry requirements and global best practices. Our production processes are fully traceable and regularly audited to maintain high standards of food safety, consistency, and operational excellence. Every stage of production—from ingredient sourcing to final packaging—is carefully monitored to guarantee reliable quality for our clients worldwide. These standards are essential for reinforcing trust with partners and ensuring consistent product reliability across all the markets we serve.

Italian culinary heritage is often a strong differentiator - how does regional tradition influence your product development and brand identity?

Italian culinary heritage is at the core of Svila's identity and product philosophy. Our recipes are inspired by regional Italian traditions, using authentic preparation methods and carefully selected ingredients. This connection to tradition guides both our product development and brand positioning, allowing us to offer frozen pizza solutions that retain the taste, texture, and authenticity associated with true Italian pizza. Preserving this heritage while adapting to modern consumer expectations remains a key aspect of our long-term development strategy.

In what ways do you communicate this authenticity to international clients?

We communicate authenticity through our products. From the selection of ingredients to our production methods, every aspect of our process reflects genuine Italian pizza-making expertise. By consistently delivering products that showcase authentic flavor, we build trust and reinforce Svila's reputation as a premium Italian frozen pizza producer. We also aim to communicate these values through long-term relationships with international partners, as well as through the consistency and reliability associated with the Svila brand.

What are Svila's main priorities for growth in the retail sector over the next few years?

Over the coming years, Svila's priority is to strengthen its position within the European retail market while continuing to expand internationally. We also aim to continue investing in innovation, product quality, and strategic partnerships to support sustainable growth and reinforce our presence in the international market.

By consistently delivering products that showcase authentic flavor, we build trust and reinforce Svila's reputation as a premium Italian frozen pizza producer.

Which markets or regions represent the biggest opportunities for expansion?

We see strong growth opportunities across Europe, particularly in markets where demand for premium Italian food products continues to rise. At the same time, international regions with growing interest in authentic Italian cuisine represent important opportunities for future development. We believe that our ability to combine quality, convenience, and authenticity positions Svila well for sustainable growth in both established and emerging markets. Our objective is to continue building long-term partnerships while strengthening our presence in key regions worldwide.

What current industry trends are shaping your strategic decisions and product development roadmap?

Several key trends are influencing our strategic direction and innovation roadmap. Consumers are increasingly seeking premium-quality products, clean-label ingredients, and more sustainable solutions. Convenience and ease of preparation also remain essential priorities within the frozen food sector. In response, Svila continues to invest in high-quality ingredients, versatile product formats, and recipes that reflect modern dietary preferences while staying true to authentic Italian pizza tradition. These evolving trends continue to shape our investment priorities and reinforce the importance of balancing innovation with authenticity and product consistency. ■

By **Jonathan Thomas**

COUNTDOWN TO THE WORLD CUP

Football's forthcoming 2026 World Cup in North America should boost demand for frozen finger foods and appetisers throughout Europe.

Arguably, the biggest event on the global sporting calendar during the summer of 2026 will be the football World Cup, which is being staged in the three North American countries. The tournament will feature 48 teams (many of them from Europe), climaxing in the final on July 19 at New Jersey Stadium in the US. Major sporting events such as this have long been recognised by food and drink manufacturers as an ideal opportunity to increase revenue, due to the many social occasions (both in-home and externally) which revolve around them. Globally, around 6 billion people are expected to watch some or all the games, equivalent to 73% of the world's population. The forthcoming World Cup is expected to attract casual viewers as well as dedicated football fans, with UK expenditure on food and drink during the tournament alone likely to reach around GBP2bn. According to data from NielsenIQ, over three-quarters of the world's football fans in Europe and North America are expected to either host or attend in-home social occasions based around matches during the tournament, with 56% planning to watch games from their living rooms, often with friends and family invited over. For European fans, the time difference with North America means that many games will take place during late afternoon or early evening, with the result that occasions such as after-work gatherings and 'big nights in' are likely to be commonplace. From a dietary perspective, the tournament's venues may help increase the appeal of foods based on American or Mexican cuisines. In-home entertaining and social occasions have traditionally been a profitable source of business for the frozen food industry, even in the absence of major sporting events. Although these are typically skewed

towards times of the year such as Christmas and New Year, the warmer months of spring and summer are also a popular time for hosting parties for those households with gardens. One of the effects of the global economic downturn has been an increase in the number of people eschewing eating out for reasons of cost, instead hosting informal parties in their homes. Other factors such as the need to arrange childcare have also contributed towards this trend. Many younger owners are beginning to appreciate the many benefits of socialising within the home, with the formal dinner parties of the past having been largely replaced by a more relaxed, informal style of casual dining. According to data from M&S Food, 36% of UK consumers claim to host a social gathering in their homes at least once during a typical month, rising to 56% of those aged under 24. Separate data from Mintel indicates that 70% of UK adults hosted in-home social gatherings in 2025, with around half doing so at least once a month. Research from furniture manufacturer DFS entitled 'How Britain Hosts' suggests that the ideal night in with friends and/or family involves a laid-back shared meal (e.g. a buffet), combined with some form of entertainment (e.g. a film or games). The research found that 28% of consumers are enjoying spending time at home more now than before, while 82% say they are more likely to host a social gathering compared with two years previously. Another factor that has contributed to the expansion of the in-home entertainment market in recent years is the increasing popularity of video streaming services. On a global basis, an estimated 1.5 billion people use subscription video-on-demand (SVOD) services. Europe has one of the world's largest regional markets – according to data from the Boston Consulting Group (BCG), digital streaming platforms accounted for 41% of Europeans' viewing time during an average week in 2025, ahead of linear television (35%). The share taken by digital streaming platforms rises to 44% for millennials, as it is younger consumers driving much of the current growth within this sector. According to data from Eurostat, almost two-thirds of people aged 16-74 in the EU region use the internet to stream television or videos, while 78% of households pay for at least one streaming subscription. This compares with 45% for EU households paying for three or more streaming subscriptions. Streaming adoption rates amongst the overall population are notably high in European countries such as Finland (93%), the Netherlands (90%) and Denmark (89%). US platforms dominate the European market for streaming services, led by Netflix with a share of 53%. This figure decreases to 19% for Amazon Prime Video and 12% for Disney+.

THE FROZEN FINGER FOODS MARKET

The market for frozen finger foods and appetisers is large and wide-ranging. Mainstays of the category include coated foods (e.g. chicken nuggets and goujons, fish goujons, breaded vegetables, mozzarella bites and Scotch eggs), chicken skewers and wings, sausage rolls, mini pizzas, mini quiches, chips/French fries and potato

 # 36%

of its UK customers were more conscious of their spending on takeaways and restaurant meals compared with the previous year.

wedges and skins. The growing popularity of ethnic cuisine and the subsequent expansion of the street foods market throughout much of Western Europe have resulted in the appearance of products such as tempura prawns, spring rolls, samosas, onion bhajis and, increasingly, gyozas (i.e. Japanese pan-fried dumplings made with a range of fillings) at many in-home social gatherings. The market has also grown to incorporate sweet options intended to be served at the end of the dining experience, with mini versions of popular desserts one major example. Convenience represents one of the main drivers of consumer behaviour within this sector, as this enables people to provide a large variety of food for their guests with minimal effort. Value for money is also appreciated by many, although there has been an upturn in demand for more premium varieties of finger foods, which perhaps invoke memories from the past (and therefore address nostalgic feelings), as well as those which fuse together certain cuisines or provide some kind of modern twist on traditional favourites. There is also often a need to cater towards various dietary requirements, such as those who do not eat meat or fish, or people with food allergies and intolerances. This is a consideration both for people hosting social gatherings in their home, as well as food organisers at conferences and visitor attractions. Another key consideration for many consumers is health and, by extension, portion control. While many are experimenting with different tastes and flavours, nutritional qualities remain important, as has been illustrated by the emergence of products promoted as being low in fat or salt, or free from artificial additives. Furthermore, the move towards smaller portions addresses the changing eating habits witnessed throughout Europe of late, specifically the replacement of the traditional three meals a day with five or six smaller equivalents, or alternatively intermittent grazing. In the foodservice market, finger foods are ideally positioned to meet the rising demand for smaller or mini-sized portions of regular foods and dishes. Serving smaller plates can help foodservice operators reduce food waste, while they are also suitable for sharing and social media imaging. Staying in the foodservice sector, demand for finger foods is also believed to have benefited from the growing popularity of brunch as a meal in markets such as the UK. Many types of finger foods are versatile enough to form components of brunch menus and dishes, able to be customised according to consumer tastes. According to research carried out by Appinio for potato products manufacturer Aviko in February 2025, 38% of respondents were positively inclined towards visiting a pub for brunch. While foods based on British dishes and recipes were most popular (liked by 60% of respondents), there was also a fondness for foreign cuisines such as American (37%), Asian (26%), French (25%), Mexican (17%) and Middle Eastern (15%). The importance of health can be illustrated by the fact that 52% of respondents rated portion size as a significant factor when ordering food for a bottomless brunch. Finger foods occupy a relatively healthy position within the expanding street foods market, while many feature strongly in the food delivery industry as exemplified by operators such as Deliveroo, Uber Eats and Just Eat. At the retail level, growth within the

 # 36%

of UK consumers claim to host a social gathering in their homes at least once during a typical month.

finger foods market has also resulted from the emergence of so-called 'fakeaways' in countries such as the UK. These are 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.

COATED FOODS

Coated foods such as breaded chicken are well represented within the market for finger foods. Europe has a growing market for fried chicken – although KFC continues to dominate (it has over 1,000 sites in the UK, for example), it is facing stronger competition from expanding US-based chains such as Wingstop, Popeyes and Dave's Hot Chicken, the latter of which specialises in chicken-based sliders and tenders with a Nashville-style hot and spicy coating. In the retail sector, the Chicken Shop brand from Nomad Foods continues to go from strength to strength. First launched in the UK in 2018, it is now worth over GBP20m and incorporates finger foods such as Hickory BBQ Chicken Wings, Buttermilk Chicken Tenders and Hot & Fiery Chicken Chunks. Potato-based products such as chips, wedges and skins also account for a significant percentage of the market. Possibly because of their inherent simplicity, opportunities abound for both foodservice and retail operators to enhance potato-based dishes using various seasonings and sauces, examples of which include sea salt, rosemary and innovations based on harissa salt and sriracha sauce. So-called 'loaded fries', i.e. French fries or chips served with various toppings are also making an increased impact in many parts of Europe. These typically feature on foodservice menus (either as side dishes or meals in their own right) and have also started to appear within the retail sector. Their popularity continues to increase, due in part to their strong links with street food cuisine, as well as their suitability for sharing images on social media platforms. Although traditional favourites such as cheese and bacon continue to hold sway, the variety of toppings used for loaded fries now includes salsa, guacamole, Indian-based curry sauces and kimchi, a Korean-based side dish consisting of salted and fermented vegetables. One of Europe's leading suppliers of frozen finger foods and appetisers is the German company Frostkrone Group. It operates manufacturing facilities in the UK, France and the US, as well as Germany, and exports its products to retail and foodservice customers in over 45 countries spanning Europe, the US and Asia. The Group encompasses several leading suppliers of frozen and chilled finger foods, examples of which include Piz'wich Creative Snacks (a French producer of pizza pockets), Varenne Gastronomie (a French supplier of breaded finger foods and ethnic varieties such as samosas, spring rolls and falafel), The Abergavenny Fine Food Company (which is based in the UK and specialises in finger foods made from goat's cheese) and Rite Swift Foods (a US-based supplier of appetisers made using Idaho-sourced potatoes). Other leading suppliers of frozen finger foods include major producers of potato-based products such as McCain, Aviko and Lamb Weston/Meijer. While these companies are primarily known for products such as frozen chips, French fries, wedges, croquettes and hash browns, they also supply appetisers, mostly for foodservice applications. Examples include breaded mozzarella sticks, breaded cheese nuggets, battered onion rings and breaded vegetables. Elsewhere, many leading grocery retailers have benefited from the rising demand for frozen finger foods by offering party food ranges, often in the form of platters. These are often launched with specific times of the year in mind, such as Christmas, New Year and, increasingly, the summer months when people are having barbecues, picnics or outdoor parties.■

> *From a dietary perspective, the tournament's venues may help increase the appeal of foods based on American or Mexican cuisines. In-home entertaining and social occasions have traditionally been a profitable source of business for the frozen food industry, even in the absence of major sporting events.*

 # 38%

of UK respondents were positively inclined towards visiting a pub for brunch (February 2025).

By **Bogdan Angheluta**

SLICING THE MARGIN: INNOVATIONS FOR FROZEN PIZZA PROCESSING

Creating a high-margin frozen pizza is an exercise in managing structural diversity; a single automated assembly line must seamlessly portion elastic mozzarella, dense proteins like pepperoni, and moisture-heavy vegetables like onions and peppers. In an era dictated by rising raw material expenses, crippling labor shortages, and unforgiving energy costs, the cutting phase has emerged as a high-stakes control point where minor machinery deviations trigger compounding yield losses.

The global cheese market continues to expand, with industry estimates valuing it at USD98bn in 2025 and projecting it to reach USD154.4bn by 2034 reflecting sustained demand across retail, foodservice, and convenience applications. Europe and the United States remain the largest and most mature markets, while countries such as China, Brazil, and India are driving new growth, supported by the rapid expansion of foodservice and changing consumption habits. Mozzarella has become the most widely processed cheese type worldwide, driven by the global popularity of pizza and ready-to-eat formats, where consistent portioning and product performance are critical. At the same time, dairy processors are operating under increasing pressure. Rising raw material and energy costs, labor constraints, and market volatility are forcing producers to focus more than ever on operational efficiency and margin protection. According to McKinsey & Company, technology is one of the primary levers identified by industry leaders to address these challenges and improve performance across the value chain. In this context, cutting performance becomes a critical control point in the process, where even small deviations can lead to measurable losses in yield and product quality.

A PRACTICAL RESPONSE TO EVOLVING CHEESE PROCESSING NEEDS

In response to these evolving requirements, **FAM STUMABO** introduces Flexifam.2, a dicer designed to deliver consistent performance in demanding cheese processing environments, with a capacity of around 1,000 kg/h depending on the cut size. The new model is an evolution of the industry-standard Flexifam 55, further refined to meet the needs of small- to medium-sized processors seeking a robust, easy-to-use solution that combines reliable cut quality with improved hygiene, simplified maintenance, and efficient operation in continuous production environments, supported by a 5.5 kW drive system. 'Processors today are under pressure to do more with less — less waste, less downtime, fewer skilled operators, and less margin for error. What we see in the field is that cutting is often underestimated, yet it has a direct impact on profitability. With Flexifam.2, we wanted to offer a practical, accessible solution for small and medium processors who need reliable cut quality, easy sanitation, and low maintenance without complexity,' explains Thijmen Put, Product Manager, FAM STUMABO.

ADDRESSING KEY PROCESSING CHALLENGES WITH PRACTICAL DESIGN SOLUTIONS

Cheese processors face a range of operational challenges, from maintaining consistent cut quality across variable products to reducing waste and

avoiding unnecessary pre-processing steps. Flexifam.2 addresses these requirements through a combination of design features focused on performance and practicality. Flexifam.2 cuts product in three steps — slicing, strip cutting and dicing — using fast-rotating knife spindles rather than forcing product through a cutting grid. A shear plate enables a very small tolerance between the crosscut knives and the shear edge, reducing friction and delivering clean, consistent dice with minimal fines across a wide range of cheese types and textures. Variations in product size are accommodated by the large drum diameter — one of the largest in its category — enabling processors to feed larger formats without the need for pre-cutting. At the same time, a 5.5 kW drive system and precise knife positioning contribute to stable, repeatable output, even when processing products with varying texture or moisture levels. The machine can process products up to 135 mm in diameter and 270 mm in length. It delivers dice sizes ranging from 3 to 15 mm. Flexifam.2 is particularly well suited to mozzarella processing, one of the most widely processed cheese types worldwide. Its large drum diameter accommodates the longer logs commonly produced by smaller and artisanal mozzarella makers, reducing or eliminating the need for pre-cutting. Thorough and efficient cleanability — a critical requirement in any dairy processing environment — is also central to the machine's design. In addition to mozzarella, it is also suitable for processing a wide range of cheeses, including Gouda, Emmental, cheddar, and other varieties. Beyond cheese, it is equally suited to a range of meat and poultry applications, including ham, bacon, pepperoni, and sausages, where the same combination of high power, cut quality, and ease of cleaning delivers comparable benefits.

> *What we see in the field is that cutting is often underestimated, yet it has a direct impact on profitability. With Flexifam.2, we wanted to offer a practical, accessible solution for small and medium processors who need reliable cut quality, easy sanitation, and low maintenance without complexity.*
>
> *Thijmen Put, Product Manager, FAM STUMABO*

Photo: FAM STUMABO

SIMPLIFYING DAILY OPERATIONS: HYGIENE, MAINTENANCE, AND EASE OF USE

Beyond cutting performance, processors also face day-to-day operational constraints related to cleaning, maintenance, and changeovers, all of which directly impact uptime and labor efficiency. Flexifam.2 has been designed to simplify these tasks through a series of practical improvements focused on ease of use and accessibility. Cleaning is facilitated by a hygienic design that includes a stainless-steel washdown motor, full stainless-steel construction, and easy access to key areas of the machine, enabling operators to perform thorough sanitation more quickly. Maintenance interventions are also simplified, with improved access to the drive compartment and a more ergonomic design that enables faster component handling, reducing a two-person maintenance job to a single person. In addition, the cutting system allows quick, straightforward tool changes that can be completed in just a few minutes, making it easier to switch between different cut sizes and product types with minimal downtime.

DESIGNED FOR REAL-WORLD CHEESE PROCESSING APPLICATIONS

Flexifam.2 is the result of a development process rooted in customer feedback and field experience. 'It shows that we stay in contact with our customers, listen to their needs, and act on their feedback. Flexifam 55 is still very popular, but we knew there were changes that would make a real difference to existing and new users alike — and Flexifam.2 delivers exactly that,' says Thijmen Put, Product Manager, FAM STUMABO.

URSCHEL INTRODUCES THE LITTLE GEM ASPIRE DICER FOR COMPACT, FLEXIBLE PRODUCE CUTTING

Food processors continue to operate in an environment shaped by rising efficiency pressures, including labor constraints, tighter production footprints, and the need for consistent yields across variable raw materials. In response, equipment manufacturers have increasingly focused on compact, flexible machines designed to integrate into modern processing lines without sacrificing cutting performance. Within this context, **Urschel** has introduced the Little Gem Aspire Dicer, a new cutting system developed by its Innovation and Development team and positioned as a compact solution for fruit and vegetable processing applications. The machine is part of Urschel's broader portfolio of industrial cutting equipment used across global food processing operations. According to the company, the Little Gem Aspire Dicer was developed through internal research and engineering efforts and reflects ongoing investment in new cutting concepts aimed at improving efficiency and product consistency on the plant floor.

A COMPACT CUTTING CONCEPT FOR FLEXIBLE PRODUCE PROCESSING

The Little Gem Aspire Dicer is designed to produce a range of cut styles for fruits and vegetables, including slices, strips, and dice formats. The system can produce slices ranging from approximately 2 mm to 20 mm, with dice and strip cuts up to 20 mm depending on configuration. Urschel positions the machine as a compact unit intended to fit into limited production space while supporting a variety of cutting applications on a single platform. The design reflects a broader industry shift toward multi-use processing equipment that can handle different product formats without requiring multiple dedicated machines.

> *The latest Urschel development in produce processing, the Little Gem Aspire Dicer employs patented Urschel technology to create precision cutting methods, engineered through extensive research and development.*
>
> *Urschel*

Photo: Urschel

COMPACT FOOTPRINT AND SANITARY DESIGN FOCUS

The Little Gem Aspire Dicer incorporates Urschel's patent-pending cutting methods, including a proprietary knife assembly system referred to as StatiCut. According to Urschel, this cutting approach is designed to enable flexible adjustment of cut types and sizes while maintaining a compact machine design. The system combines slicing and crosscut mechanisms to achieve different cut geometries for produce applications. Urschel states that the design is intended to support precision cutting across a range of fruits and vegetables, including apples, onions, carrots, potatoes, and other common processing inputs. In line with other equipment in Urschel's portfolio, the Little Gem Aspire Dicer emphasizes sanitary design and ease of maintenance. The machine is engineered with a compact footprint to accommodate production environments where floor space is constrained, while maintaining access for cleaning and operational servicing. Urschel also highlights that the system was developed with a focus on total cost of ownership, including operational efficiency and maintenance considerations over time.

PRODUCT POSITIONING IN THE URSCHEL PORTFOLIO

The Little Gem Aspire Dicer joins a wider range of Urschel cutting systems that span high-capacity industrial dicers and slicers used in fruit, vegetable, dairy, and protein applications. The company continues to position its equipment around continuous production capability, sanitary design, and adaptability to different product types and cut sizes. The introduction of the Aspire platform reflects ongoing incremental innovation within Urschel's cutting systems portfolio, particularly in response to demand for flexible, space-efficient processing equipment. ■

Slice | Strip | Dice

www.urschel.com

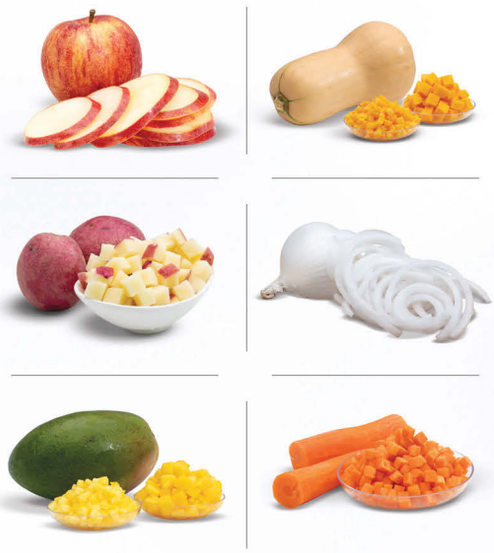
A New Cutting Concept by Urschel:

Meet the Little Gem Aspire™ Dicer

Successful food processors around the world partner with Urschel for optimal cutting solutions. Urschel introduces a new cutting concept to assist processors.

Engineered for a low total cost of ownership — from initial investment to ongoing operation — the Little Gem Aspire™ Dicer offers ease of use, compact design, and high overall performance.

The machine offers a small footprint and is ready to run to produce ideal cuts including a full range of slices from 2 mm up to 20 mm, a variety of strip cuts, and dices up to 20 mm.



Learn more about the Little Gem at urschel.com.

Reveals of the Little Gem Aspire™ Dicer

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By **Bogdan Angheluta**

HOW NEXT-GEN INSPECTION SYSTEMS STABILIZE FROZEN FOOD THROUGHPUT

Machinery manufacturers across the inspection spectrum used interpack 2026 to showcase a fundamental paradigm shift, reframing scanning and detection systems not as disruptive regulatory roadblocks, but as critical drivers of operational uptime, volume optimization, and waste reduction.

For the frozen food sector, where intense margin pressures leave absolutely no room for error, this evolution from reactive food safety defense to proactive efficiency hits an incredibly vital nerve. Processing food within the cold chain introduces severe physical complications, as fluctuating product temperatures, surface moisture, and high salt gradients often trick legacy sensors into triggering costly false positives. To explore how modern automated inspection overcomes these harsh environmental variables, we interviewed specialists from **Mettler-Toledo** to map out the next operational frontier for the industry. The resulting discussions highlighted significant breakthroughs in sophisticated metal detection hardware designed to sharpen scanning sensitivity without inflating product waste, alongside the integration of next-generation X-ray systems that leverage layered artificial intelligence to execute hyper-precise defect classification in real time. Ultimately, the unified message cutting across these technical advancements is that modern inspection must actively protect a manufacturer's yield rather than interrupt it. By deploying smarter, adaptive software capable of neutralizing the fluctuating 'product effect' inherent to frozen goods, processors can seamlessly maintain strict compliance standards while driving a noticeable lift in overall line productivity.

IMPROVING DETECTION CONSISTENCY

Metal detection performance is often discussed in terms of sensitivity, but **Stuart Preston, Business Development Manager at Mettler-Toledo International** argued that processors increasingly expect systems to deal with more complex realities than laboratory conditions. According to him, one of the key development priorities behind Mettler-Toledo's latest systems has been improving detection consistency across products that behave differently as conditions change during production.'One of the things we've done is really listen to what customers wanted. Customers have always been interested in improving detection, so we brought out the M56. Compared with our previous model, the Profile Advantage, it offers better detection on wet products, dry products and frozen products. It's more of an all-rounder. If the application is specifically dry products, then we have the M55, which includes eDrive Plus to provide a stronger signal and stronger field for better detection on dry products.' Preston explained that products entering inspection at deep-frozen temperatures may behave differently as they move through the line. 'On the M56, we use our 3S Plus algorithm. When products are at minus 18 degrees they behave more like dry products. But with products like potato chips or fries, when they stop or begin to thaw, they start behaving more like wet products because conductivity changes. The M56 uses multi-simultaneous frequency, meaning it runs two frequencies at the same time.'

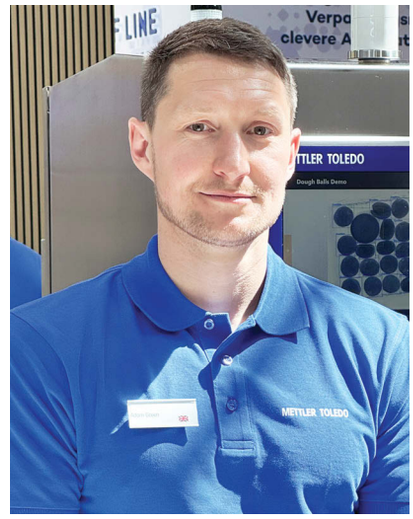
REJECTION IS THE BIGGER ISSUE

Line speed remains an obvious concern for processors, particularly in high-volume environments. However, Preston suggested that speed itself is often not the limiting factor. Instead, reject precision and reject management increasingly become operational priorities. 'For frozen products, speed is generally less of an issue than in confectionery. Detection itself usually isn't the problem unless you're running above around 110 or 120 meters per minute, which is rare. The bigger issue is rejection. You don't want to reject more product than necessary.' That conversation moved quickly into rework practices and the economic implications of reject decisions. 'Some customers may reject several products together depending on the reject setup, but increasingly customers are looking at rework, where rejected products can be

brought back to the front of the line. Rejection is important, and we have many different rejection options. We're also looking at conveyor systems that can reject product and then rework it as well.' Preston was also cautious about reducing false reject performance to a single metric. 'There's no single answer. If a product is calibrated at minus 18 degrees, you may get no false rejects. But as it begins to thaw, conductivity changes and false rejects can increase. That's why you need to build variance into the system. Using multi-simultaneous frequency and the 3S Plus algorithm, we remove much of that product effect and improve false reject rates. Correctly set up, false rejection rates should be close to zero.' The discussion suggested that inspection increasingly depends on understanding process variability rather than relying solely on equipment capability. Digitalization was another major topic of discussion. Preston described changing expectations not only from operations teams but increasingly from IT and compliance departments. 'One of the big things now is digitalization and compliance. A lot of IT departments are moving away from USB reporting. So instead of using USB, users can log in, access history, download reports and send them directly to storage directories, ProdX—our data capture system—or directly through OPC UA or OPC into MES or ERP systems.'

AI-ENABLED APPLICATIONS

The second conversation shifted from metal detection toward X-ray inspection and AI-enabled applications. **Adam Green, Customer Solutions Manager at Mettler-Toledo Safeline X-Ray,** described AI not as a replacement for inspection systems but as an additional layer intended to improve decision quality. 'AI is very much about enhancing inspection capability. Because of EU AI laws, we must take security implications very seriously. What it allows us to do is enhance levels of inspection, reduce false reject rates, and increase overall equipment effectiveness by reducing disruption.' He stressed that technology is currently being applied selectively. 'It supplements existing inspection tools. It captures images and works mainly around completeness checks rather than contamination itself. If you've got five pieces in a pack, it can



verify completeness even if those pieces are scattered and not always in exactly the same position.' Green also dismissed the idea that AI necessarily changes hardware economics. 'The way we've designed it is as a software feature. It becomes additive to our existing contamination inspection portfolio. We don't believe it changes manufacturing cost. It's there to supplement existing tools and deliver more benefit to customers.' Green also introduced the X53 bulk-flow X-ray system, which was presented as one of the company's launches at interpack. The system is designed around bulk applications and combines premium X-ray capability with dual-energy inspection. 'It has the ability to deliver five tons per hour of throughput.' During the demonstration, Green emphasized not only detection but the handling of detected material. 'The product is leveled out across the belt, moves through the detection zone, and then the major innovation is really in the rejection system.' According to Green, two reject approaches are available. 'One is an air blast reject, which is very accurate and very sensitive. The other is a flat reject, which is effective but creates a little more product loss because it's less precise.' The reject philosophy again returned to yield preservation. 'The air blast reject uses very specific lanes, so when contamination is detected, it removes a very small cluster of material rather than a larger group. That improves material yield and reduces losses, which in turn drives up overall equipment effectiveness.' Green also highlighted design decisions intended to support production practicality. 'It also includes hygienic design features. The belt can be removed by a single operator, so again it's very customer-focused and efficient. We're always focused on enhancing uptime, quality and cycle time.'

CREATING VALUE THROUGH BETTER QUALITY ASSURANCE

One of the more interesting discussions moved beyond contamination entirely and into product quality control. Green described examples that focused on verifying product composition rather than simply identifying foreign bodies. 'Brand protection has two sides: product safety and product quality. Because of current EU limitations, our AI development is initially more focused on quality.' He described a demonstration scenario built around meal component verification. 'One common complaint is not enough protein. A checkweigher may miss that because if one piece is missing but there's extra material elsewhere, the weight could still be correct. What AI allows us to do is count the actual number of pieces.' According to Green, that capability changes the outcome from simple rejection toward process correction. 'If the product falls below that threshold, there's complaint risk. If it exceeds it, there may be giveaway. That creates value through better quality assurance, reduced complaints and potential rework.' He continued, 'AI can inspect multiple things at once. Traditional systems had limitations with overlapping products or presentation variation. AI improves shape recognition, allows more accurate differentiation and can inspect multiple parameters simultaneously. That means products can be reworked instead of destroyed, improving productivity and monetary return.' For processors evaluating new inspection investments, Green suggested implementation decisions would remain application specific. 'It doesn't automatically mean buying a new machine. AI can work with existing equipment, but there may need to be development work based on the specific application. It's not always a straight plug-in.' As the conversation concluded, both interviews pointed toward the same direction: inspection systems are increasingly expected to contribute to operational performance, yield preservation, process visibility, and product consistency—moving further away from their traditional role as isolated end-of-line control points. ■

By **BOgdan Angheluta**

THE SHIFT TO DATA-DRIVEN FOOD INSPECTION

The global food processing industry is facing a perfect storm of structural pressures, driven by volatile agricultural inputs, tightening global food safety regulations, and persistent labor shortages. Historically, frozen food and commodity processors were forced to accept a costly operational compromise: accelerate line throughput or tighten defect tolerances at the expense of usable yield. Today, that paradigm is shifting. By embedding advanced deep learning models, multi-view data fusion, and real-time neural networks directly into production lines, market leaders are transforming optical sorting into a highly adaptive, yield-optimizing asset.

Frozen food processors are under constant pressure to achieve high throughput while maintaining tight quality standards, which becomes increasingly challenging as product portfolios expand and labor becomes harder to find, according to Gina Maria Bonini, President of **Key Technology**. 'Drawing on decades of experience in frozen food processing applications, our approach with optical sorting is to combine high-capacity product handling, optimized product presentation, intelligent inspection and precision ejection technology so processors don't have to compromise between throughput and sort accuracy', she adds. For IQF applications, chute-fed optical sorters are typically preferred because frozen products move efficiently on a chute and can be inspected from both sides while fully in air. Systems like COMPASS and VERYX use advanced multispectral sensing and sophisticated software to analyze multiple types of inspection data simultaneously, helping identify subtle defects and foreign material while minimizing false rejects. Intelligent ejection systems then remove only the targeted defect or contaminant, even at very high line speeds, Gina Maria Bonini explains. 'We're also seeing processors place greater importance on operational consistency during long production runs. Features such as recipe-driven programming, sensor placement designed to minimize product debris buildup and remote monitoring capabilities help maintain stable sort performance across frequent product changes and around-the-clock operation.'

Today, AI is helping processors improve defect detection, reduce false rejects and manage increasingly variable raw product conditions by enabling sorters to make more precise accept/reject decisions in real production environments.

Gina Maria Bonini, President of Key Technology

Photo: Key Technology

MAXIMIZING YIELD VERSUS TIGHTENING DEFECT TOLERANCES

In the past, processors often had to choose between removing more defects and maximizing yield because stricter defect tolerances could also result in more good product being inadvertently rejected. Today, advanced optical sorting systems significantly reduce that trade-off, Key Technology's President says. 'Technologies such as Pixel Fusion and Object Fusion help improve detection accuracy. Pixel Fusion improves contrast between good product and defects or foreign material by combining multiple types of sensor data at the pixel level in real time. Object Fusion combines inspection data from multiple views of each object, enabling the sorter to evaluate more of the object at once rather than a single perspective. These capabilities enable the sorter to make more accurate accept/reject decisions, helping frozen food processors remove subtle defects and foreign material while reducing unnecessary product loss.' According to her, the flexibility of recipe-driven sorting is also important in frozen applications where processors may run multiple grades, products or customer specifications on the same line. Operators can quickly adjust sort parameters based on the desired quality target while maintaining repeatable results across product changeovers. In potato strip applications, Sort-to-Grade technology can even make decisions based on how each individual strip impacts the final 'in-the-bag' grade profile, helping processors meet grade targets while minimizing unnecessary product loss.

INTEGRATING THE POWER OF AI

'Key Technology has been applying AI-enhanced sorting technologies to frozen food applications for several years', Gina Maria Bonini says. 'Today, AI is helping processors improve defect detection, reduce false rejects and manage increasingly variable raw product conditions by enabling sorters to make more precise accept/reject decisions in real production environments. For example, AI-enhanced algorithms can better distinguish individual objects within the product stream, identify subtle defect patterns and improve dimensional profiling for products like frozen potato strips and IQF vegetables. AI is also being used to better distinguish true foreign material events from false positives, which helps processors avoid unnecessary waste and production interruptions.' She goes on to explain that AI-powered software can help maintain more consistent sort performance as product conditions change while making recipe management easier for operators, which is especially valuable for processors handling frequent product changeovers with limited labor availability. 'Combined with data analytics tools like Key Discovery, these systems also provide greater visibility into reject trends, raw material quality and upstream process performance. This helps processors identify patterns, address root causes and take a more proactive approach to quality management', she concludes.

BÜHLER BETS ON DEEP LEARNING TO REDEFINE OPTICAL SORTING WITH SORTEX AI700

Bühler Group has introduced the SORTEX AI700, a new optical sorting machine that pushes artificial intelligence deeper into food processing lines, aiming to improve yield, reduce waste and strengthen food safety standards in high-value commodities such as oats and grains. The Swiss industrial technology company launched the SORTEX AI700 in May 2025, positioning it as a next-generation upgrade to its established SORTEX optical sorting portfolio. The system is initially targeted at oat processors, where it is designed to remove barley, wheat and rye contaminants to support gluten-free production requirements. At the core of the machine is a deep learning-based detection system that uses neural networks trained on millions of labeled images. Unlike earlier generation sorters that rely on rule-based or manually tuned machine learning models, the AI700 applies convolutional neural networks to distinguish between acceptable product and defects using color, shape and texture data. Bühler says this approach enables more precise impurity removal while reducing the rejection of usable product, a long-standing trade-off in optical sorting systems. The company claims the machine can significantly improve yield, with internal benchmarks indicating improvements of up to 50% in product recovery in certain applications. Optical sorting systems are widely used across food processing to remove foreign materials and defective products from bulk flows before packaging. They are particularly important in grains, nuts, dried fruit and frozen vegetables, where contamination risks and quality variability are high. The AI700 reflects a broader industry shift toward combining traditional machine vision with data-driven learning systems to improve detection accuracy. The SORTEX AI700 also emphasizes usability and automation. Bühler has positioned the system as a "turnkey" solution designed to reduce operator complexity, with simplified installation and reduced training requirements compared with earlier-generation machines. Remote monitoring and real-time performance tracking are integrated into the system, allowing processors to analyze defect patterns and raw material quality over time. Beyond yield and automation, traceability is another central feature. The system generates real-time data on defect types and concentrations, which can be used to optimize upstream sourcing decisions and improve process control. This reflects growing demand from food manufacturers for greater transparency and data integration across production lines.

Photo: Bühler

AN ESTABLISHED BRAND

Bühler's SORTEX brand is one of the most established in the sector, with installations across grain, rice, coffee, nuts, pulses and spice processing globally. The AI700 extends that platform into what the company describes as deep learning-based sorting, reflecting a broader transition from traditional optical classification toward adaptive, data-trained inspection systems. Industry analysts say this shift is being driven by multiple structural pressures, including tighter food safety regulations, rising raw material costs and increased variability in agricultural inputs due to climate change. These factors are making yield optimization and defect minimization more economically significant than in previous generations of sorting technology. While the AI700 is currently focused on oat applications,

Bühler has indicated that the system will be trained for additional commodities over time. That expansion would place it directly in competition with other AI-enabled optical sorters across grains, seeds and high-value processed foods, where incremental improvements in yield can translate into meaningful financial gains for processors. The introduction of the SORTEX AI700 signals a continued convergence between industrial food processing and machine learning, as optical sorting systems evolve from rule-based inspection tools into adaptive, data-driven production assets.

TOMRA SHOWCASES AI-POWERED 4C OPTICAL SORTER FOR HIGH-PRECISION NUT AND FROZEN FOOD PROCESSING

TOMRA Food has introduced the TOMRA 4C, a new optical sorting system designed for nut and individually quick frozen (IQF) food applications, as part of its broader push toward AI-driven food inspection technologies. The system combines traditional camera-based sorting hardware with layered artificial intelligence, including deep learning models, to improve defect detection and reduce product loss in high-throughput processing environments. The launch, detailed in company communications in 2025, reflects TOMRA's strategy to simplify operator workflows while increasing sorting accuracy in commodity categories where product variability and contamination risks remain high. The 4C is preconfigured for deployment, with the company emphasizing reduced setup time and lower operational complexity compared with earlier-generation sorting systems. At the core of the TOMRA 4C is a dual-AI architecture that integrates LUCAi, a deep learning system, with machine learning tools that allow operators to fine-tune performance based on real-time production conditions. This combination enables the machine to adapt to evolving defect profiles while maintaining consistent classification accuracy across shifts and batches. The system is designed to detect a wide range of foreign materials and product defects while maintaining a low false reject rate, which TOMRA states is below 1%. The company positions this balance between sensitivity and yield preservation as a key differentiator, particularly in nut processing, where over-rejection can significantly reduce profitability.

DESIGNED FOR FOOD SAFETY AND QUALITY CONTROL

The 4C is targeted primarily at nut processors and IQF producers, two segments where optical sorting plays a critical role in food safety and quality control. The machine uses pulsed LED sensors and camera-based imaging systems to analyze products in free-fall or chute-based configurations, identifying deviations in color, shape, size and texture. Beyond detection performance, TOMRA has placed significant emphasis on operational efficiency. The system features a simplified user interface designed to reduce training requirements and streamline daily operation. It also incorporates an open mechanical design intended to reduce cleaning time and maintenance downtime, which are key cost drivers in food processing environments. Another key element of the platform is its integration with TOMRA's broader software ecosystem, including XCD, which enables data-driven optimization of sorting recipes and performance monitoring. The system's AI framework is designed to support both pre-trained models and operator-driven adjustments, allowing processors to respond quickly to changes in raw material quality or emerging defect types. TOMRA has also highlighted the role of its LUCAi deep learning technology in expanding the capabilities of optical sorting beyond rule-based classification. Initially deployed in fruit applications such as apples and berries, LUCAi is now being extended into nut processing, with the goal of improving consistency in identifying subtle or previously hard-to-detect defects. The launch of the 4C reveals a broader industry trend toward combining sensor hardware with adaptive software systems in optical sorting. Competitors such as Bühler and Key Technology are pursuing similar strategies, integrating artificial intelligence into sorting platforms to improve yield, reduce labor dependency and enhance traceability across food production lines. As food processors face rising pressure from labor costs, regulatory requirements and variability in agricultural inputs, systems like the TOMRA 4C reflect a shift in optical sorting from fixed-function equipment to adaptive production tools capable of learning and improving over time. The introduction of the 4C reinforces TOMRA's position in the global optical sorting market as it continues to expand its AI-enabled portfolio across food categories, particularly in high-value segments where even small gains in yield or defect reduction can translate into significant economic impact. ■

Photo: TOMRA

By **Bogdan Angheluta**

FROZEN TO PERFECTION

Industrial freezing has become less about simply lowering temperature and more about controlling how products behave while they are being frozen.

As production lines push higher speeds and tighter consistency requirements, processors are increasingly focused on how to preserve appearance, texture, and positioning from infeed to packaging without introducing variability that downstream equipment has to correct. That challenge is where system design starts to matter as much as freezing capacity. Airflow behavior, product stability on the belt, and temperature uniformity across the conveyor all play a direct role in whether pizzas exit the freezer in a consistent, packaging-ready state or require rework due to shifted toppings or uneven freezing.

WHY THE GYROCOMPACT IS A PERFECT OPTION FOR FREEZING PIZZAS

Freezing pizzas while maintaining the product appearance, topping and quality poses significant challenges in continuous in-line processes. One of the key requirements is to keep the toppings intact and ensure that each pizza remains in its original position throughout the freezing process for a seamless transition to the packaging stage. However, achieving such outcomes can be a challenge. Improper airflow management can result in toppings being blown off the pizzas, while inefficient conveyor systems can cause products moving out of position and even lead to pizzas freezing together, causing problems for the packaging line. Additionally, inadequate airflow control can cause pizzas to exit the freezer at drastically varied temperatures as a result of uneven temperature distribution. These challenges are critical concerns for pizza processors, but they are effectively addressed by the Frigoscandia GYRoCOMPACT spiral freezers from **JBT Marel**. Jan Grundmann, JBT Marel's Europe-based Area Sales Manager for Frigoscandia, emphasizes the significance of airflow management in achieving success when running pizzas through a spiral freezer. "Freezers with improper airflow typically apply the air too aggressively to a sensitive product like pizza," he explains. "The risk here is that too-strong airflow can blow off toppings such as cheese and ham causing them to scatter throughout the freezer instead of remaining on the pizza where they belong." In contrast, the GYRoCOMPACT applies a more gentle – but no less effective – airflow, which helps ensure the pizza comes out exactly as it went in and that no toppings are blown off in the process. A further guarantee against in-line product damage is the GYRoCOMPACT's self-stacking belt. The design of the belt means very little tension from infeed to outfeed, with no belt shaking or slipping caused by high drive forces. Grundmann proudly notes that JBT Marel has achieved a 1,000-meter-long conveyor line movement with zero belt shaking or slipping issues. He continues:

Photo: JBT

> *Maintaining the correct positioning of pizzas from infeed to outfeed is crucial to avoid problems during the subsequent packaging stage, such as pizzas freezing together or being mispositioned.*
>
> *Jan Grundmann, JBT Marel's Europe-based Area Sales Manager for Frigoscandia*

"Maintaining the correct positioning of pizzas from infeed to outfeed is crucial to avoid problems during the subsequent packaging stage, such as pizzas freezing together or being mispositioned."

ENSURING OPTIMUM RESULTS

Another important aspect of freezing pizzas is the fact that the target temperature must be the same across the entire belt width. So why is this stage vital for pizza processors? Grundmann explains: "This again relates to airflow. If you just centralize airflow to the spiral from one direction, then the products directly exposed to the cold air in the front-row will always be colder than the next product and the products after towards the center of the freezer."

The freezing process, he continues, has to be efficient but it also has to be handled in a way that is gentle to the pizza toppings while at the same time delivering even distribution. "Our customers need ALL pizzas to come out at the same temperature of e.g. -18°C, not within a range somewhere around this target," Grundmann says. "This is the ideal solution if you want to freeze pizza, keep your toppings where they are, you want to hold the pizza in a defined position for the process before and after, and you want to have an equal temperature

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Photo: Ashworth

Available on Omni-Grid 360 and Omni-Pro belts, Rapid Splice offers the strength of metal with the simplicity of plastic belting. Rapid Splice is not only quick, but it also reduces the risk of splice failure, minimizes downtime, and boosts efficiency.

Andreas Hofman, Commercial Director for Ashworth

distribution across all products." Key advantages of GYRoCOMPACT for pizza processors include cleaning: although the GYRoCOMPACT ensures that pizza toppings remain intact during freezing, it is inevitable that some cheese crumbs may find their way through the freezer, especially when processing up to 16,000 pizzas per hour in 24/5 operation periods. To secure highest food-safety-standards, the GYRoCOMPACT comes with an automated, Clean-In-Place (CIP) system, which maintains the freezer in optimum conditions with minimal human intervention. In terms of energy, customers can achieve substantial savings with the energy-efficient GYRoCOMPACT. How? The GYRoCOMPACT features far fewer components and requires far less drive power than comparable freezers as a result of the selfstacking-conveyor-belt requiring lower electrical power consumption. Finally. the JBT Marel Frigoscandia LVS Refrigeration System is a technology that has revolutionised the way modern industrial freezers function in more ways than one. Developed to make freezer and refrigeration unit combinations more efficient and effective, LVS-users typically report six-digit-savings on refrigeration per freezer year after year. By utilizing the Frigoscandia GYRoCOMPACT spiral freezers, pizza processors can overcome the challenges associated with freezing pizzas while ensuring the preservation of flavor, toppings, and product quality. The gentle handling, even temperature distribution, and additional benefits such as automated cleaning and energy efficiency make the GYRoCOMPACT the ideal choice for freezing pizzas at industrial scales.

ASHWORTH TARGETS FASTER METAL BELT MAINTENANCE

Ashworth Belts B.V., a conveyor belt manufacturer, has introduced its Rapid Splice technology at interpack, positioning the product as a faster and simpler method for metal belt splicing. "Ashworth's Rapid Splice technology makes metal belt splicing faster, safer, and easier than ever without requiring any welding," said Andreas Hofman, Commercial Director for Ashworth. "Available on Omni-Grid 360 and Omni-Pro belts, Rapid Splice offers the strength of metal with the simplicity of plastic belting." The company said the system is designed to reduce downtime in industrial operations by streamlining what has traditionally been a labor-intensive maintenance task. The Rapid Splice tool is sold as part of a kit that includes a tap, drill bit, thread locker and nut, while customized rods are offered separately. "Our customers have been asking for a quick, easy splicing method. We listened, and we delivered," Hofman added. "Rapid Splice is not only quick, but it also reduces the risk of splice failure, minimizes downtime, and boosts efficiency." Also at interpack, Ashworth presented the Heavy-Duty Small Radius Omni-Grid 360 Weld. The company says the new belt sets a new benchmark in the small-radius category, positioning itself as the highest tension-rated option available. "Ashworth's Heavy-Duty Small Radius Omni-Grid 360 Weld is small, but mighty with a tension rating of 400 pounds," said Jonathan Lasecki, Engineering Director for Ashworth. "Combined with its patented zero-tension, 360 buttonless weld, it offers improved durability, additional strength, is easy to clean, and can increase belt life." The new belt is built around a system of rods and interlinked components designed for durability and load handling. A central row of heavy-duty links creates two product lanes, flanked by collapsing links on the inner edge and collapsing bar links on the outer edge. Each connection point is secured with a single weld. According to Lasecki, the 360-degree weld design enhances structural integrity, making the belt suitable for spiral, low-tension, and turn-curve applications. He added, "The Small Radius Heavy-Duty Omni-Grid 360 Weld is available with a turn ratio ranging from 1.0 to 1.59 times the belt width. Ideal for use in applications where heavy product loads or floor space is limited, the Small Radius Heavy-Duty Omni-Grid can turn either left or right, pivoting about a center link," he added. Ashworth, a global manufacturer, produces and services both metal and plastic conveyor belting used in straight running, turn-curve, low-tension, PosiDrive Spiral and self-stacking spiral applications. Ashworth Factory Service provides engineering support including system refurbishment, troubleshooting, belt installation and ongoing maintenance services for industrial clients worldwide. ■

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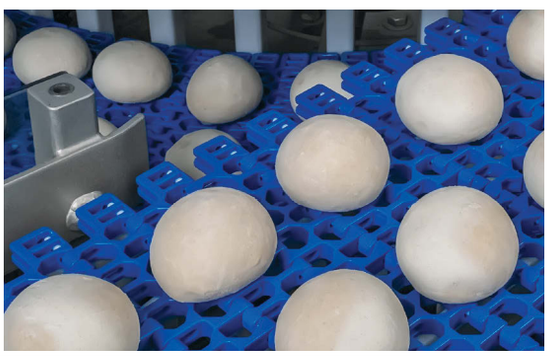

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By **Bogdan Angheluta**

WHAT'S SHAPING THE INDUSTRY?

The frozen burger market has experienced steady expansion, with frozen patties now accounting for most of the total packaged burger market share. This market position reflects advancements in processing technologies that have changed product characteristics.

Historically, foodservice operators and grocery retailers anticipated that consumers would view frozen meat as inferior to fresh meat. However, sensory and palatability research indicates that consumer perceptions are changing. A study published in Meat and Muscle Biology evaluated fresh and frozen beef strip loins aged for identical periods and found that consumers rated the frozen variants as significantly more tender than the fresh ones, with no negative impacts on flavor or overall eating quality. This data allows meat processors to market frozen patties based on verified sensory performance rather than logistical convenience alone. Formulation trends are also adapting to consumer preferences. While interest in plant-based alternatives has adjusted due to sensory differences regarding flavor and mouthfeel, hybrid formulations have gained market traction. Specifically, 50/50 hybrid patties that blend beef or pork with texturized legume proteins

have become an active product category for manufacturers. Consumer characterization studies indicate that these hybrid variations are perceived as significantly juicier and softer than traditional full-meat formulations, receiving comparable overall acceptance scores in panels. For product developers, research indicates that while sustainability initially drives consumer trial, core sensory parameters—such as meat flavor, juiciness, spiciness, and saltiness—remain the primary factors for long-term product retention.

'HEALTHY' IS NOT JUST A TREND

Health considerations continue to affect the market, particularly regarding fat content. Because reducing animal fat can negatively impact a patty's moisture and texture during cooking, manufacturers have explored functional substitutes. Recent studies demonstrate that replacing up to 50 percent of traditional animal fat with molecular substitutions of oatmeal and chia powder complexes maintains product quality. These plant-based ingredients serve a stabilizing role during sub-zero storage. Over a 60-day freeze cycle, these formulations reduce lipid oxidation and the accumulation of free fatty acids, which cause off-flavors and rancidity. The resulting patties maintain a high water-holding capacity, preserving the product's juiciness and texture when prepared. On the production side, processing facilities have optimized freezing velocity to prevent cellular degradation caused by temperature shifts. Slow freezing allows water molecules to form large ice crystals that puncture muscle cell membranes, leading to fluid loss, or purge, during thawing and cooking. Utilizing high-velocity flash-freezing ensures that water solidifies rapidly into uniformly small ice crystals across the cellular structure, protecting the product matrix. Additionally, research into preparation methods shows that cooking patties directly from a frozen state yields lower total fluid loss than slow-thawing them first. To address oxidation risks caused by mechanical grinding, which increases the surface area exposed to oxygen, processors are investigating the integration of nanoencapsulated essential and edible oils. These microscopic barriers naturally limit lipid and protein oxidation,

 # 4.43
bn USD was the estimated value of the global packaged burgers market in 2024.

extending shelf life and retaining flavor without the use of synthetic chemical preservatives. Ultimately, the modern frozen burger has become a highly optimized sector within the center-plate retail market.

WHAT THE MARKET DATA SHOWS US

Across regions and product categories, the packaged burgers market reflects a convergence of convenience-driven consumption and expanding access to ready-to-eat food formats. According to Grand View Research, the global packaged burgers market was valued at USD4.43bn in 2024 and is expected to reach USD6.99bn by 2030, expanding at a CAGR of 7.9% between 2025 and 2030. The figures point to a broader shift in consumer behavior, where ready-to-eat formats are playing a more central role in everyday consumption patterns. Regional trends highlight the strength of Europe, which accounted for the largest revenue share at 42.6% in 2024. Within the region, Germany led the packaged burgers market in 2024, underscoring a high concentration of demand. At the same time, Europe's mature market position is being complemented by faster growth in emerging regions, particularly Asia Pacific, which is identified as the fastest-growing market amid changing consumption patterns in increasingly urban populations. Product segmentation further reinforces the dominance of frozen formats. According to Grand View Research, the frozen segment accounted for the largest revenue share of 83.4% in 2024, supported by advantages such as extended shelf life, simpler storage

 # 7.9%
is the expected CAGR of the global packaged burgers market between 2025 and 2030

requirements, and reduced preparation time. The report also points to improvements in freezing technology, which have enhanced product quality and strengthened consumer acceptance. Shifts in patty preferences are also evident. The veg segment led the packaged burgers market in 2024, reflecting growing global demand for healthier and more sustainable meal options. This trend aligns with rising consumer awareness around wellness, environmental concerns, and dietary diversification. At the same time, conventional offerings remain important, with the non-veg segment expected to register a strong CAGR over the forecast period, supported by continued demand for familiar, flavor-driven products. Regional breakdowns provide additional context to the market's structure. In Europe, leadership is attributed to strong demand for convenience foods, a wide range of available products, and lifestyle shifts that favor ready-to-eat meals. The report also highlights increasing health awareness across the region, which has encouraged innovation in both gourmet-style and plant-based burger formats. Germany's leading position in Europe is linked to a strong preference for convenience foods and a well-established fast-food culture. Demand is supported by the coexistence of traditional and plant-based burger offerings, which broadens the consumer base. In North America, the market is projected to grow steadily, driven by rising demand for convenient meal solutions and continued expansion of fast-food chains. Growth is further supported by consumer interest in products that balance convenience with nutritional or sustainability considerations. Within the region, the US packaged burgers market led North America in 2024, reflecting strong preference for quick-service meal formats. Asia Pacific stands out as the fastest-growing region, with a projected CAGR of 9.8% over the forecast period. Growth is being driven by rapid urbanization and a growing middle class increasingly oriented toward ready-to-eat meals. Expanding fast-food penetration and the rise of digital delivery platforms are further accelerating adoption. Within the region, China held the largest share in 2024, with the China packaged burgers market leading Asia Pacific in revenue terms. ■

By **Bogdan Angheluta**

FROZEN FOOD MOVES TO CENTER OF MEAL PLANNING

AFFI's latest industry report suggests frozen food is no longer viewed as a backup option in American households but is increasingly becoming a central part of weekly meal planning as consumers respond to rising concerns about nutrition, affordability, and food waste.

The findings come from the 2026 Power of Frozen in Retail report, released by the American Frozen Food Institute (AFFI) and FMI – The Food Industry Association. The study indicates that frozen food has shifted from an occasional convenience purchase to a routine component of household meal strategies for a growing share of consumers. The report highlights several structural shifts in consumer behavior. It finds that frequent use of frozen food is expanding, with

consumers who purchase frozen products every few days or daily now accounting for 40% of shoppers, up from 35% in 2019. Nearly 30% of consumers say they plan to increase their purchases, marking one of the strongest levels of purchase intent in recent years. At the same time, 77% of shoppers now buy frozen food with a specific meal or day in mind, compared with 71% in 2023, underscoring its role in structured meal planning rather than impulse purchasing. Economic pressure is also shaping demand. Consumers are increasingly turning to frozen food as a way to manage grocery budgets and reduce waste, with 37% saying they use frozen products specifically to limit food waste. The report suggests that broader concerns about inflation and household spending have reinforced interest in at-home cooking and more deliberate meal planning, both of which align with frozen food usage.

WHY FROZEN?

The report also points to evolving expectations around quality and nutrition. Ease of preparation, price and taste remain the top three drivers of purchase decisions, but consumers are increasingly receptive to better-for-you options in the frozen aisle. According to the findings, 96% of shoppers believe the frozen food aisle offers healthier options, while 71% say they actively look for frozen products they have not previously purchased, indicating continued openness to experimentation. One of the most notable behavioral shifts is the growing integration of fresh and frozen ingredients. The study finds that 76% of consumers now combine fresh and frozen foods within the same meal, reflecting a blended approach to shopping and cooking rather than a strict preference for one category over the other. Households, the report suggests, are increasingly using both freezer and refrigerator inventory as complementary tools rather than substitutes. The findings align with the recently released 2025-2030 Dietary Guidelines for Americans, which encourage higher consumption of fruits, vegetables and nutrient-dense foods. Industry stakeholders argue that frozen foods can support those goals by improving access to nutritious ingredients while reducing spoilage and household waste. The 2026 Power of Frozen in Retail report was presented at AFFI-CON, an annual industry gathering held in San Diego that brought together more than 1,700 professionals across the frozen food supply chain for business development and strategic discussions about the category's future. The study was conducted by 210 Analytics with a Circana sales data overlay, based on a national survey of 1,560 frozen food consumers responsible for at least half of household grocery shopping decisions.

AMERICA'S FROZEN FOOD MARKETPLACE IS ALSO CHANGING

A significant line is being drawn between consumers' dining rooms and supermarket freezer cases. Due to record-high levels of inflation, historically-low household disposable incomes, and an all-time high level of health-related expenditures, Americans are beginning to dramatically alter how they are allocating their food budgets. Families are now cutting back on formal dining occasions and searching for affordable, easy-to-access alternatives to provide for their families. According to estimates by IBISWorld, total sales of pizzerias across the country declined by approximately 0.3%, to USD49.5bn in 2025, indicating a tighter restaurant marketplace than ever before. Independent pizza chains account for anywhere from 45% to 60% of the entire pizza market. Therefore, these face greater challenges to remain competitive. Labor costs have increased to account for almost 30% of every dollar generated by restaurants as a whole due to a 3.86% increase in average hourly earnings year over year. Industry research indicates that one area of retail opportunity that is likely to generate significant amounts of revenue for frozen and ready-to-make pizza manufacturers will be through successful entries into the grocery store marketplace by individual premium pizzerias. This provides them with the opportunity to circumvent the obstacles typically faced when operating a restaurant business, including high labor costs and fees charged by third-party delivery services which continue to charge significantly to deliver their customers' orders. By offering their menu items in a retail format in the freezer section, these upscale independent pizza manufacturers can serve the needs of consumers who want restaurant quality food but do not want to pay restaurant prices. While premium culinary brands are benefiting from the displacement of daytime dining caused by changes in office culture, so does the retail frozen food segment. The rising costs of eating-out during working hours (especially at fast-food places/casual dining locations) have prompted 78% of office workers to say they've changed their lunch routine in order to eat less expensively; additionally, nearly half report skipping a restaurant lunch at least weekly so that they may save money. ■

#40%
of US shoppers purchase frozen products every few days or daily.

77%
of US shoppers buy frozen food with a specific meal or day in mind (vs 71% in 2023).

37%
of US consumers say they use frozen products to limit food waste.

By **Dieter Mailänder,**
Redaktionsbüro Dieter Mailänder

INNOVATIVE REFRIGERATION TECHNOLOGY FOR TRADE, INDUSTRY, AND COMMERCE

Ice buildup in refrigeration systems absorb energy and cost money. While these layers of ice can be removed, this is typically only done at set intervals. Removing them in as needed—sooner or later—would be an innovative solution. Such a solution has been available for some time now. This could be of interest to both small-scale and industrial bakeries alike.

How many bakery businesses in Europe might be interested in this solution? Due to the atomistic structures in most European countries, it is not easy to get a clear picture of the market, especially in the bakery sector. The European Confederation of National Bakery and Confectionary Organizations have provided a clue on their website. There it states that it represents 190,000 small and medium-sized businesses from Scandinavia, the Benelux countries, France, Germany, Southern Europe (including Albania but excluding Portugal) with a total workforce of just over two million people. On average, each of these companies has about 11 employees. Many of them employ only two to five people; by contrast, the leading group, which is likely to be relatively small, is expected to employ well over 50, and perhaps even over 100 people. These small businesses are known for their baked goods, which are made fresh every day. If they have multiple retail locations, they typically supply them either with fresh, ready-to-bake products or with pre-baked items that employees finish baking on site. The more these companies expand their chain of stores, the more the focus shifts to frozen baked goods. These products also play a key role in bakery shops or baking ovens in the food retail sector, as well as in certain segments of the eating-away-from-home market. In Germany, for example, six times more frozen bread and rolls are sold in restaurants and institutional catering than in the retail sector; hospitals and nursing homes are particularly high-volume segments. In terms of requirements, products for these segments differ from those intended for end consumers. For example, they must be mechanically and, in some cases, thermally durable enough to withstand long transport on the wards of a spacious hospital complex, and they must remain stable until they are ready to eat. Ideally, the baked goods on the patient's tray should have a crisp crust, a light, soft, and springy crumb, their fresh characteristic aroma, and their original weight—just like at the breakfast table at home.

MODERN TECHNOLOGY REDUCES NIGHT WORK

To meet the diverse requirements of different sales channels, product development and production staff must consider a complex set of different parameters. High-performance

equipment and systems offer extensive capabilities for precisely handling different types of dough in terms of their consistency, moisture content, resting times, options for intermediate storage, or their fermentation behavior (delays, interruptions, etc.). The same applies to the processes of baking, (flash) freezing and rapid cooling. Climate control is a highly demanding task in all stages of the process, one that is made easier by the devices' extensive software libraries. A key parameter of production is its energy efficiency, which has significant impact on the company's profitability. The central questions here are: Which energy sources does a business use today? Which ones can a business use in the future? Can it recover energy, for example, in the form of waste heat, or generate itself—for instance, via a photovoltaic system or a combined heat and power plant? Can it take advantage of day-ahead prices (see below)? Alongside the issue of energy, topics of working hours and job satisfaction have been gaining increasing prominence in recent years. This is particularly noticeable in regions where labor is in short supply. Bakers can significantly reduce one of the key challenges they face once faced the widespread practice of working at night. Modern dough management and equipment technology make it possible to shift production to the early morning hours. Businesses with such state-of-the-art production find it much easier to recruit qualified employees than their competitors. Conclusion: The more flexibly and versatile a bake shop owner can use his/her equipment and facilities, the more cost-effective, environmentally friendly, and employee-friendly its operations will be.

CUSTOMIZED SOLUTIONS FOR REFRIGERATION CONTROL

Regarding the solution to the problem mentioned: Refrigeration processes and the ice buildup inextricably linked to them have a significant impact on cost-effectiveness and environmental sustainability of a production. Defrost cycles are typically triggered on a timer, rather than as needed. A company founded in 2019 has recently developed an AI-powered refrigeration control system using high-tech sensors. The system learns autonomously, reacts dynamically to its user, automatically triggers defrosting based on actual icing conditions, and transforms cold storage rooms into smart energy storage units. According to the company, this allows it to manage energy flows in a targeted manner and reduces peak loads. The project was based on research into safety-critical systems designed to monitor ice formation in the aerospace industry. Conventionally, ice is detected indirectly, for example, by using temperature sensors. In the new process, proprietary ice sensors, in conjunction with door and environmental sensors as well as intelligent algorithms, detect rough, mixed, and clear ice on evaporators or heat exchangers of refrigerator systems. By combining different measurement principles, they generate a tightly confined electromagnetic field. This field changes as soon as even the smallest amount of ice forms. The system detects these changes precisely and controls the start time and duration of each defrost cycle with exact precision. The system has a modular design. Upon request it can combine, among other things:

The system learns autonomously, reacts dynamically to its user, automatically triggers defrosting based on actual icing conditions, and transforms cold storage rooms into smart energy storage units.

- frequent monitoring of a cold room (temperature, humidity, door openings, energy consumption) using an intelligent temperature and defrost control system (precise detection of frost buildup on the evaporator—defrosting as needed),
- energy supply from PV systems, combined heat and power plants, energy storage systems or,
- the management of energy flows based on day-ahead prices (trading electricity for the following day on spot markets).

This allows users to take advantage of off-peak rates, optimize their energy costs and carbon footprint, and reduce the loads on public power grids.

 # 190k

small and medium-sized businesses from Scandinavia, the Benelux countries, France, Germany, Southern Europe (including Albania but excluding Portugal) are represented by the European Confederation of National Bakery and Confectionary Organizations.

PRECISE PROCESS CONTROL WHILE BAKING

Back to the baking processes in the shops. It's not uncommon for these tasks to be handled by trainees. To ensure baking results that delight customers, it's helpful to repeatedly remind them of certain details, especially during the training phase. These may seem trivial, but because employees quickly assume they know everything, they sometimes overlook basic requirements here and there such as:

- Always preheat the oven and avoid heat loss (place baking trays in the oven so that they are not exposed to drafts).
- Be sure to follow the recommended times for thawing and baking.
- Leave a space of about 3 cm all around the next item on the baking sheet before placing the next item.

A baked product meets traditional standards when

- the surface is smooth and shiny,
- the color is uniform and characteristic of the product,
- the baked product increases in volume compared to the dough, and
- the crispy crust is well-formed.

Modern ovens in the outlets control these and many other processes using sophisticated programs. Baking—including delayed baking and multi-stage baking—rapid cooling, and flash freezing are everyday steps in the production of baked goods and bread in both artisanal and industrial businesses. Even for these routine processes, knowledgeable and creative minds continue to develop innovative solutions with great perseverance. Perhaps their benefits are limited at first. Often, areas of application emerge that were not initially foreseeable: areas in which much greater potential lies dormant. So, let's all stay curious. ■

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

AJINOMOTO EXPANDS FROZEN DUMPLING LINE

Ajinomoto Foods North America, Inc. is expanding its frozen dumpling portfolio in the US with new products aimed at consumers seeking faster meal solutions that still deliver restaurant-style flavor, as demand grows for globally inspired convenience foods. The company, part of the broader Ajinomoto Group, has introduced Sweet & Spicy Chili Saucy Pork & Chicken Gyoza and Japanese Jumbo Chicken Shumai, which are now available at Albertsons Companies and Ahold Delhaize, with additional distribution planned for later in the summer.

https://www.eataji.com/

WHITE LILY LAUNCHES READY-TO-BAKE FROZEN BISCUITS

White Lily, a staple in Southern kitchens for more than 140 years, is moving beyond its traditional flour business with the introduction of a new line of frozen, ready-to-bake biscuits, signaling an effort to capture growing demand for convenience foods that retain a homemade feel. The biscuits are made using 100% soft winter wheat flour, a key component of the brand's identity, known for producing a lighter, more tender crumb. The result, the company said, is a product that bakes into a consistent golden finish with a soft, airy interior.

https://www.whitelily.com/

TIPIAK TARGETS UK FOODSERVICE DEMAND WITH NEW VEGAN CANAPÉ RANGE

Tipiak is expanding its presence in the UK foodservice market with the launch of a vegan canapé assortment, as operators seek to broaden plant-based offerings while maintaining premium presentation and operational efficiency. The French frozen food specialist has introduced a 36-piece Vegan Canapé Selection designed for hospitality, events and banqueting, where visual appeal and consistency are critical.

https://www.tipiakfoodservice.co.uk/

PACKAGING REPORTER

Supporting the global packaging industry

OUT OF THE BOX PACKAGING NEWS

FROSTKRONE SHOWCASES CHEESY LOOPS AT PLMA

Frostkrone Food Group is spotlighting its Cheesy Loops at PLMA 2026, after the product was selected by the event's independent jury for inclusion in the New Product Expo, a platform widely regarded as a key showcase for emerging retail innovations. The product reflects a broader push within the frozen and convenience food sectors toward items that combine visual differentiation with indulgent flavor profiles. Frostkrone's Cheesy Loops, characterized by their ring shape and filled centers, are designed to stand out both on shelves and in foodservice presentations.

https://frostkrone-foodgroup.com/

MCCAIN INTRODUCES BEER BATTERED POTATO WAVES

McCain Foods, one of the world's largest producers of prepared potato products and appetizers, has unveiled its latest product: Brew City Beer Battered Potato Waves. The new product shows the company's push to innovate within a category long dominated by traditional French fries, while giving chefs and restaurant operators across the United States and Canada a way to expand menus without significantly increasing labor or kitchen costs.

https://www.mccainusafoodservice.com/

NATURAL GROCERS BROADENS PRIVATE-LABEL PORTFOLIO

Natural Grocers is expanding its private-label portfolio with the introduction of two varieties of wild smoked salmon, marking a continued push by the family-operated natural and organic grocer to strengthen its in-house offerings. The new products, sold under the Natural Grocers Brand, include sockeye and coho salmon sourced from wild-caught Alaskan fisheries. The retailer said the additions are designed to meet growing consumer demand for premium, ready-to-eat seafood options that balance quality with everyday convenience.

https://www.naturalgrocers.com/

FARM RICH TARGETS BREAKFAST MARKET WITH NEW PROTEIN-FOCUSED OFFERINGS

As Americans continue to reshape their morning routines around speed and convenience, Farm Rich is expanding its breakfast portfolio with three new products aimed at time-pressed consumers seeking both flavor and nutrition. The company's latest additions—High Protein Blueberry French Toast Sticks, High Protein Cinnamon French Toast Bites, and Sausage Loaded Hash Brown Bites—are designed to meet growing demand for portable, protein-rich options that can be prepared in minutes.

https://www.farmrich.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

L'ORIGINALE

Pizza alla pala®

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25 HOURS LEAVENING

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