

The Future of Frozen Food 2026



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Conagra Brands, a leading maker of frozen foods including brands such as Birds Eye®, Healthy Choice®, Marie Callender's®, Banquet®, P.F. Chang's Home Menu®, Gardein® and more, proudly shares the third edition of the Future of Frozen Food report. This report is not based on traditional consumer surveys, and instead leverages Conagra's cutting edge demand science and insights expertise. In addition, we partnered with Circana, LLC to provide robust sales data and in-home consumption behaviors from its National Eating Trends® report. NielsenIQ's Label Insight technology was used to classify and code on-pack claims at the UPC level, enabling accurate sizing of attribute-driven sales across the aisle. The latest social media trends are also layered in from Tastewise, as are Google Search Trends from Similarweb. This report provides a comprehensive, data-driven look at the future of the \$93.5 billion U.S. frozen food industry, as defined by Circana, LLC.

U.S. Consumers are choosing from a diversified array of frozen food options, and they are consuming them in new ways. This report evaluates new trends emerging in the U.S. frozen food landscape, while reexamining trends from the [Future of Frozen Food Report 2025](#), which have seen continued growth.

Growth is reported in both dollars and volume sales metrics. Volume helps control for price and size shifts, while dollars capture premiumization and category value.



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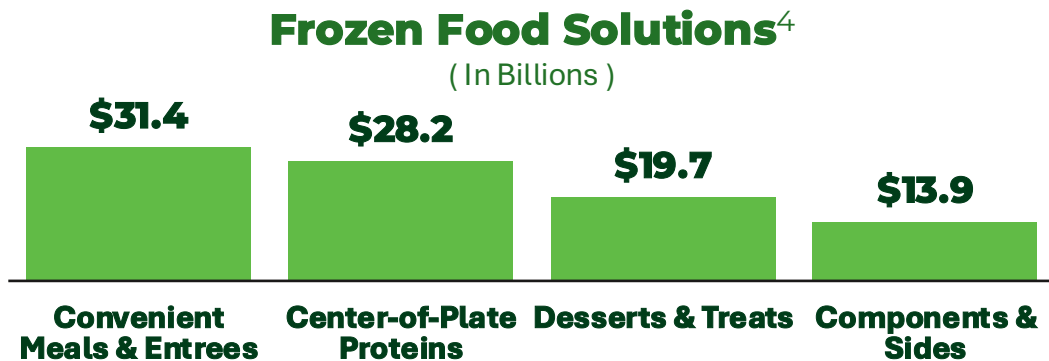
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The State of Frozen Food

From ready-to-heat entrees and sides to indulgent desserts, the frozen food category offers high-quality, convenient options for a variety of occasions and price points. The frozen food aisle addresses U.S. consumers' preferences and needs, with **over 80 billion annual eating occasions that include frozen items**¹.

Frozen food is one of grocery retail's largest and most essential spaces, reaching nearly every U.S. household and **generating \$93.5 billion in annual sales**². The department is also a major value driver, as **average basket spend more than doubles**³ when frozen items are purchased.



Across households and generations, frozen food provides a variety of solutions.

Gen Z leans into fast, high flavor formats like handhelds and appetizers.

Millennials and Gen X-ers with kids rely on frozen food throughout the day, balancing family-friendly mains and multi-serve meals with vegetables and treats.

Boomers favor easy prep, portionable comfort such as single-serve dinners, and classic desserts⁵.

1. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Number of Annual Eating Occasions with Frozen Food, YE August 2025
2. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, Dollar Sales, 52WE September 21, 2025
3. Circana, LLC, Scan Panel, Total US - All Outlets, Basket Dollars Per Trip including Frozen Department Items vs not including Frozen Department Items, 52WE October 5, 2025
4. Circana, LLC, Total US - MULO+ with Conv, Frozen Department, Meal Solution Aggregates, Dollar Sales, 52WE September 21, 2025
5. Circana, LLC, Total US - All Outlets, HH Generations, HH Presence of Children, Dollar Index by Frozen Subcategory, 52WE October 5, 2025

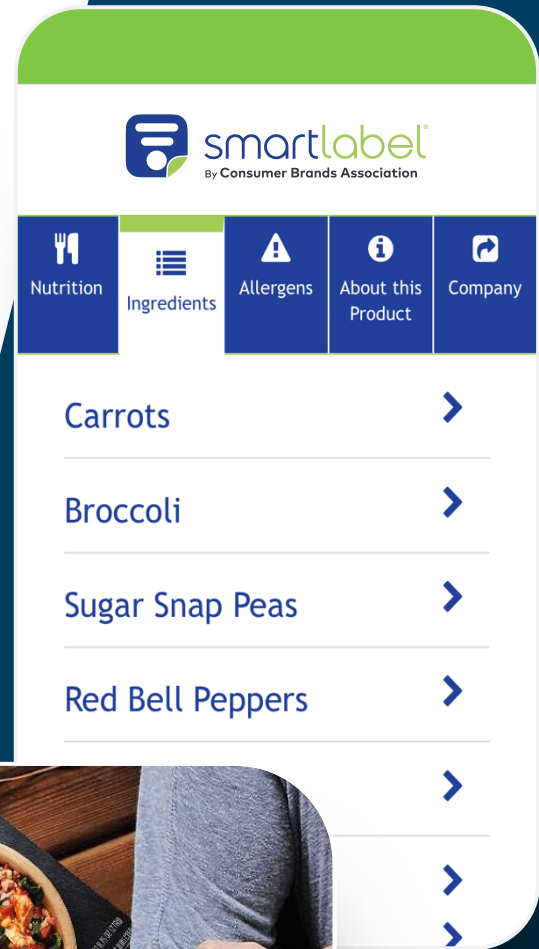
Real Food, Naturally Preserved

Freezing food naturally locks in freshness and flavor without the need for added preservatives¹. Today, **nearly 25% of consumers say they actively try to reduce artificial additives and preservatives while seeking more whole, minimally processed foods**², making the frozen food aisle an appealing place to shop.

Across the consumer-packaged goods (CPG) space, food companies are removing artificial dyes and additives, a major move towards purposefully simple ingredients.

Cleaner label frozen items, characterized by, among other attributes, minimal processing and being free from seed oils and hormones, represent nearly **\$28 billion** in sales³. Among this group of health-forward frozen items, artificial-flavor-free products are the most prevalent, a **\$7.2 billion attribute**⁴.

The growing demand for recognizable and simple ingredients has also elevated the importance of ingredient transparency. Frozen food meets the demand with products that use ingredients close to their freshest form, giving consumers confidence in what they're eating.



1. Laxmi Behera, Parbati Tudu and Namrata Priyambada, "A Comparative Analysis of Nutritional Content in Fresh and Frozen Fruits and Vegetables", International Journal of Applied Home Science, Volume 10 (11 & 12), November & December (2023): 456-463, ISSN: 2394-1413 (Web)
2. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, % of Respondents Trying to Get Less, Trying to Get More, YE August 2025
3. Circana, LLC, Total US - MULO + with Conv, Total Frozen Department, Dollar Sales, CAGR % Change Dollars Sales vs Dollar Sales 3 Years Ago, 52WE October 19, 2025 NIQ Product Explorer, Powered by Label Insight contains "Clean Label/Minimally Processed", "Animal Welfare" and "Oils" attributes
4. Circana, LLC, Total US - MULO + with Conv, Total Frozen Department with On-Pack Claim, "Artificial Flavor Free," Dollar Sales/Share of Clean Label Dollar Sales, 52WE October 19, 2025 NIQ Product Explorer, Powered by Label Insight Contains Artificial Flavor Free attribute

Consumption of products with clean labels is rising fastest among Gen Z and Millennials, with dollar sales increasing 6.6% in 2025. These groups are significantly outpacing older generations, which generated similar sales of clean label products as the year prior⁶. Additionally, families with kids are **21% more likely** than the average household to purchase frozen foods that are free of preservatives⁷.

Shoppers viewing **“real food”** as a family value will likely sustain long term category growth, as more homes entering family-forming years will increase the volume of clean, simple frozen products into their daily diets.

- **Healthy Choice® Simply Steamers Grilled Basil Chicken** bowl is made with 100% natural chicken, *(no artificial flavors, minimally processed)* penne pasta and includes a variety of four vegetables including red bell peppers, artichokes, yellow squash and spinach.
- **Birds Eye® Vegetables** delivers exciting and convenient vegetables for any occasion. The **Birds Eye Antioxidant Blend** with broccoli florets, carrots, and sweet bell peppers has nothing artificial and is a good source of Antioxidant Vitamins A & C.



If frozen food products with clean labels were its own category, it would be the 4th largest category based on dollar sales, behind only carbonated beverages, salty snacks and bottled water.⁸



6. Circana, LLC, Total US - All Outlets, HH Generations, % Change Dollar Sales vs Dollar Sales Year Ago, 52WE October 5, 2025
7. Circana, LLC, Total US - All Outlets, HH Generations, Dollar Sales Index to Panel Distribution, 52WE October 5, 2025
8. Circana, LLC, Total US - MULO + with Conv, Total Store, Dollar Sales, 52WE September 21, 2025

The Future of Frozen Food | 2026 Trends



1 The Power of Protein



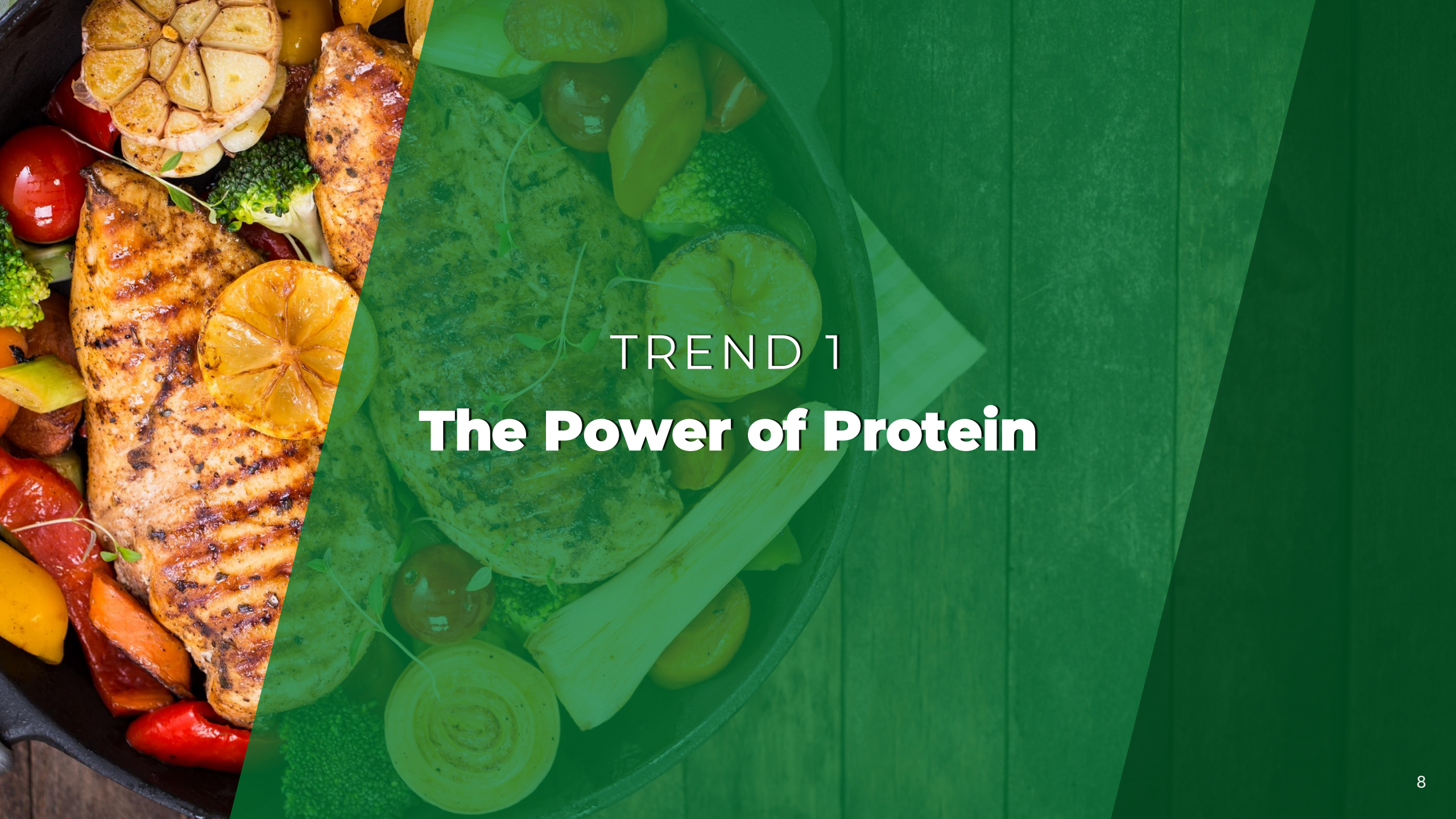
2 Restaurant Favorites, Frozen Convenience



3 Serving Up Connection: Together at the Table



4 Rise and Dine, The Breakfast Evolution



TREND 1

The Power of Protein

TREND 1

THE POWER OF PROTEIN

Among key nutritional attributes, protein leads the pack, out-performing fiber, probiotics, and whole grains¹. Social conversation around protein climbed **21%** in the past year², with **295 million** protein related searches³, signaling protein's role as both a nutrition and lifestyle driver.

Protein satisfies multiple needs, including hunger, energy, and muscle maintenance, making it a universal food priority. The freezer delivers these benefits with hearty entrees, high-protein bowls, and snackable options.

The frozen aisle is the leading space in the store for high protein food at **\$12 billion annually**⁴.



High protein frozen food continues to accelerate at **11% volume compared to the prior year**⁵, with strong gains in **chicken and turkey**⁶ as shoppers choose lean proteins that balance taste, health, and affordability.

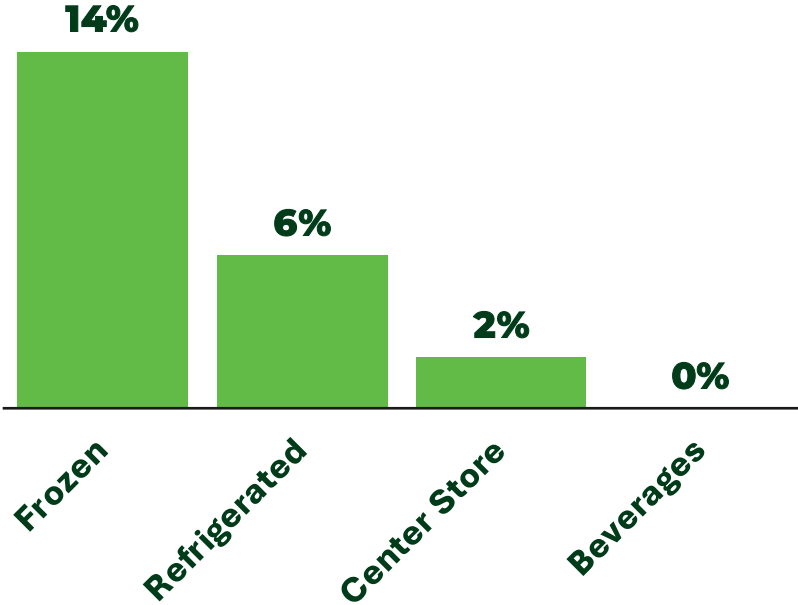


1. Circana, National Eating Trends®, Sourced from Home/Retail, % of Respondents Trying to Get More, Year Ended August 2025, not including "Vegetables" or "Hydration" as nutrients
2. Tastewise, Social Conversations vs YA, "Protein", 12 Months Ended September 2025
3. Similarweb, Google Search Trends, Searches for "Protein", 12 Months Ended September 2025
4. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, Dollar Sales, 52WE October 19, 2025
NIQ Product Explorer, Powered by Label Insight Contains High Protein attribute
5. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, Volume Growth v. YA, 52WE October 19, 2025
NIQ Product Explorer, Powered by Label Insight Contains High Protein attribute
6. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, % Change Dollar Sales vs Dollar Sales Year Ago, 52WE October 19, 2025
NIQ Product Explorer, Powered by Label Insight Contains High Protein attribute

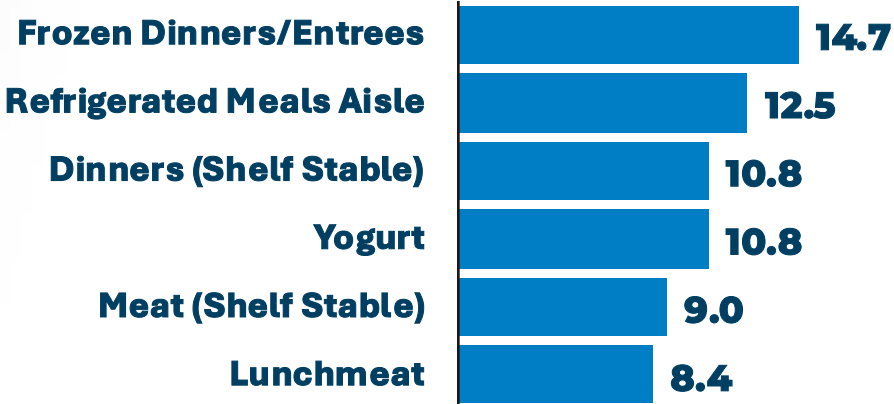
Beyond the sheer size of the protein-packed food segment, frozen food is a leading space for high protein products, with about **14% of the total frozen department dollar sales** falling into this group. This accounts for nearly double the share seen in refrigerated food, and far exceeding snacks, center-of-store groceries, or beverages⁷.

In a normal day, protein can contribute up to 35% of a person’s daily calories, equaling over 100 grams a day for a 150 pound individual⁸. Frozen meals lead the store in average grams of protein per serving with 14.7 grams⁹, delivering ease to consumers who are trying to fulfill protein requirements without needing to find countless food options throughout the day.

High Protein Dollar Share of Department⁷



Average Grams of Protein Per Serving⁹



7. Circana, LLC, Total US - MULO+ with Conv, Total Store by Department, Share of Dollar Sales with "High Protein" as % of Total Department Dollars, 52WE October 19, 2025
 NIQ Product Explorer, Powered by Label Insight Contains High Protein attribute
 8. UCLA Health, Sandy Cohen, "How Much Protein Do We Really Need", Published on September 9, 2025
 9. Circana, LLC, Total US - MULO+ with Conv, Total Frozen, Shelf Stable & Refrigerated Departments. Dollar Sales Weighted Average Grams of Protein per Serving, 52WE September 21, 2025



The growth of this trend spans all generations, especially larger households and families with children, who rely on frozen food to stretch budgets and simplify meals.

Gen Z fuels high-protein chicken and pizza growth, gravitating toward familiar, high flavor formats.

Millennials drive protein rich frozen breakfast and dinners and entrees.

Gen X contributes positive volume change to plain vegetables, like edamame and protein-forward desserts, balancing health and reward in a single trip.

Boomers lead in appetizers and snack rolls and pizza varieties that are high in protein, leaning into easy, portionable solutions that still deliver comfort¹⁰.



Aligning with common guidance of 15 to 30 grams per meal¹¹, items like Marie Callender's® Chicken Parmigiana Bowl provide familiar, protein-rich comfort with **30 grams of protein**, delivering a sizeable amount of daily protein requirements in one meal.



10. Circana, LLC, Scan Panel, Total US - All Outlets, HH Generations, % Change Volume Sales vs Volume Sales Year Ago, 52WE October 5, 2025

11. Kristi Wempen, R.D.N. Diabetes Education, Nutrition. "Are you getting enough protein?", Mayo Clinic Health System, Published on November 17, 2024



When seeking a sweet treat, consumers bring this attitude of “high protein” with them. Frozen protein desserts and ice cream, such as **Greek yogurt bars**, are seeing strong momentum, with volume up **36% in 2025**¹².

Vegetarian-friendly snacking options like **edamame** are also growing, **up 10% in volume growth annually over 3 years**¹³, showing that protein is no longer confined to meat or traditional mealtimes. As consumers redefine healthy indulgence, frozen food stands out for its ability to serve both functional needs and moments of indulgence.

Edamame has one of the highest protein contents of any vegetable you can eat, coming in at **18.4g per cup**¹⁴. Topping salads, on the side of a sushi roll or just straight up, edamame is a fun and easy way to up your daily protein intake.



12. Circana, LLC, Total US - MULO+ with Conv, Frozen Novelties, % Change Volume Sales vs Volume Sales YA, 52WE October 19, 2025
NIQ Product Explorer, Powered by Label Insight Contains High Protein attribute

13. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, Plain Vegetables - Frozen, Edamame, % Change Volume Sales vs Volume Sales YA, 52WE October 19, 2025

14. US Department of Agriculture, Agricultural Research Service, “Edamame, frozen, prepared”, Published on April 1, 2019



TREND 2

Restaurant Favorites, Frozen Convenience

TREND 2

RESTAURANT FAVORITES, FROZEN CONVENIENCE

Restaurant favorites are moving from takeout bags to freezer shelves as consumers recreate indulgent dining experiences at home. The widening cost gap between dining out and eating at home is pushing consumers toward frozen meals that offer similar satisfaction at a fraction of the price.

Dining out is over **4x** more expensive than eating at home¹

In addition, restaurant prices are growing faster than retail prices². Frozen food is the practical alternative to restaurant spending, combining quality, convenience, and value in one aisle. Consumers are increasingly searching for ways to recreate their favorite restaurant dishes at home, with “copycat” recipes inspired by leading quick-service restaurants generating site visits over **38 million** the past year³.

1. Circana, LLC, Total US - MULO+ with Conv, Total Edible and Beverage Dollar Sales, 52WE September 2025; National Eating Trends®, Sourced from Home/Retail, Meals per Capita; CREST®, Average Eater Check, YE September 2025

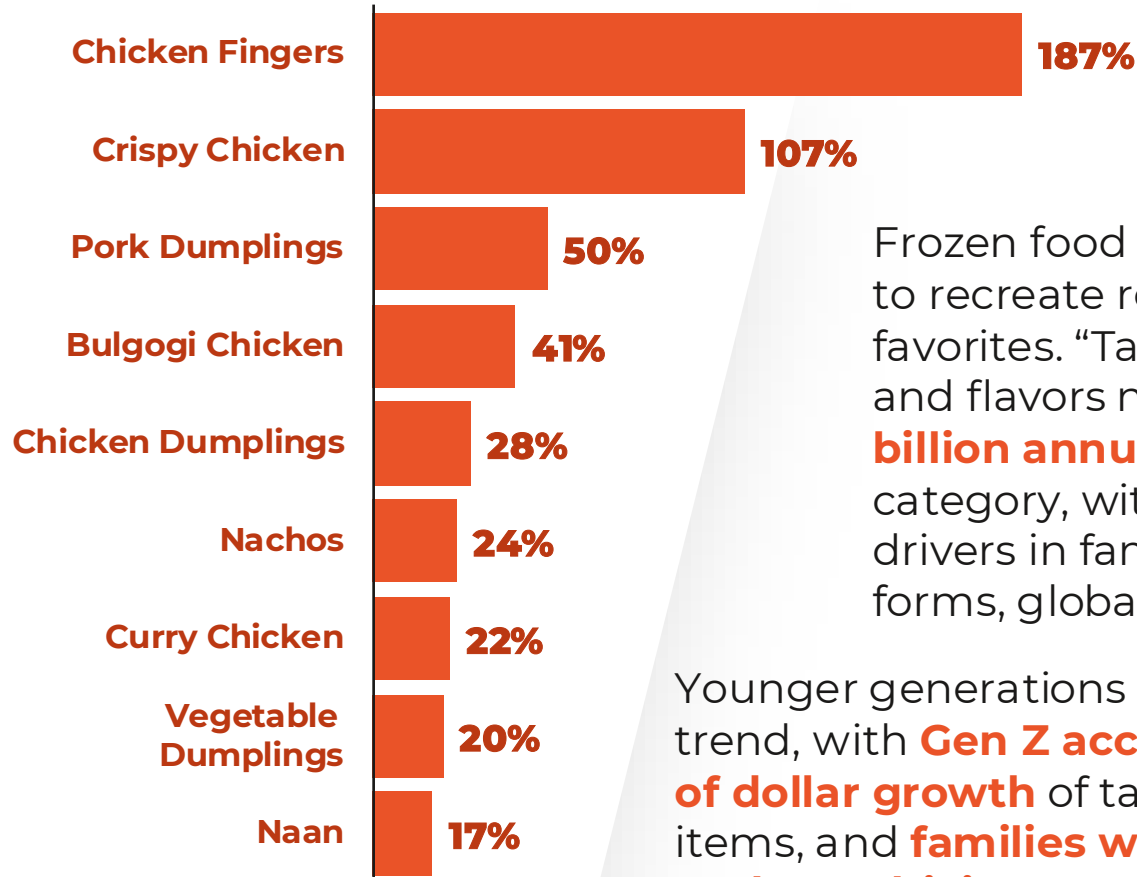
2. U.S. Bureau of Labor Statistics, CPI Food-at-Home and CPI Food Away-from-Home vs Year Ago, September 2025

3. Similarweb, Google Search Volume, Food and Beverage Websites, Multiple Search Terms, 12 Months Ended September 2025



Top Growing Take-Out Style Forms & Flavors in Frozen⁴

Volume Sales 3-Year CAGR



Frozen food offers an easy way to recreate restaurant favorites. “Takeout style” forms and flavors now total **\$14.3 billion annually⁵** in the frozen category, with volume growth drivers in famous chicken forms, global flavors and bites.

Younger generations are driving this trend, with **Gen Z accounting for 20% of dollar growth** of takeout style frozen items, and **families with children under 12 driving 40%⁶**.



4. Circana, LLC, Total US - MULO + with Conv, Frozen Department, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52WE October 19, 2025, Filtered to Products with minimum \$10MM in Retail Sales

5. Circana, LLC, Total US - MULO + with Conv, Frozen Department, Dollar Sales, 52WE October 19, 2025

6. Circana, LLC, Scan Panel, Total US - All Outlets, HH Generations and HH Life Stage, % Change Dollar Sales vs Dollar Sales Year Ago, 52WE October 5, 2025



Seasonal moments amplify the shift toward at-home indulgence. **During the football post-season, sales of frozen game-day favorites like potato skins, jalapeno poppers and mozzarella sticks rise roughly 14% above the weekly average⁷** as crowds reach for convenient, crowd-pleasing bites. In February 2025 alone, crispy potato skins saw a spike of 42% over average weekly sales throughout the year⁸.

7. Circana, LLC, Total US - MULO+ with Conv, Syndicated Hierarchy, Frozen Appetizers & Snack Rolls, % Change 4-Week Average Dollar Sales across December/January/February vs 4-Week Average Dollar Sales within 52WE September 21, 2025
8. Circana, LLC, Total US - MULO+ with Conv, Custom Hierarchy, Frozen Potato Skins, % Change 4-Week Average Dollar Sales across February vs 4-Week Average Dollar Sales within 52WE September 21, 2025
9. Circana, LLC, Total US - MULO+ with Conv, Frozen Department, Dollar Sales and CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52WE October 19, 2025
10. Datassential, Menu Trends, Year Ended September 2025
11. Similarweb, Google Search Volume, Food and Beverage Websites, Searches for "Fried Pickle", 12 Months Ended September 2025

Banquet® MEGA Chicken Filets bring the viral “chicken sandwich wars” to home kitchens. Chicken sandwiches sold nearly **\$80 million in frozen and grew 11% in volume** on a three-year compound annual growth rate basis⁹.



New this season, **Vlasic® Frozen Fried Pickles** bring restaurant-style crunch to the freezer aisle, tapping into rising demand for crispy, shareable snacks, as **fried pickle menu items grew 6%¹⁰** and recipe visits climbed **22% year over year¹¹**.

A photograph of a group of people sitting around a dining table in a kitchen, eating and talking. The image is overlaid with a semi-transparent blue filter. The text is centered over the image.

TREND 3

Serving Up Connection: Together At The Table

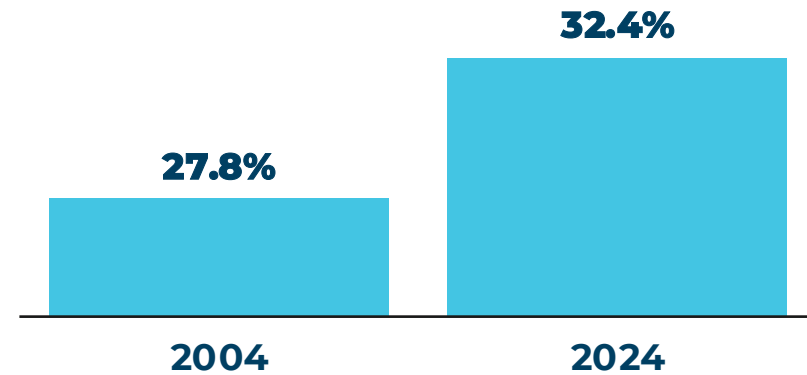
TREND 3

SERVING UP CONNECTION: TOGETHER AT THE TABLE

After years of grabbing meals on the go and eating in front of screens, U.S. consumers are rediscovering the joy of getting back to the table for shared plates and conversation. With a step up from 2024 and a continuation on post-pandemic gains, **52% of main meal occasions include multiple people¹. When looking solely at dinner occasions, that number rises to 66%².**



18–34 Year Olds Living with a Parent³



Inside the home, the structure is evolving. **Today, one-third of young adults (18–34) are living with a parent**, a nearly 5% increase from 20 years prior³. Coupled with 18% of homes being multigenerational⁴, this state of evolution for the American household presents as a structural tailwind for group dining in the future. The convenience, variety and affordability of frozen food make it the natural solution for feeding the household.

1. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Who Else Present at Main Meals, YE March 2025
2. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Solo vs. Social Occasions, YE August 2025
3. U.S. Census Bureau, Current Population Survey, March and Annual Social and Economic Supplements, 1981 to 2024. Source of 1980, 1970, and 1960 data: U. S. Census Bureau, 1980 Census of Population, PC80-2-4B, "Persons by Family Characteristics," Table 4. 1970 Census of Population, PC(2)-4B, Table 2. 1960 Census of Population, PC(2)-4B, Table 2
4. Pew Research Center, Demographics of Multigenerational Households, as defined by 2 more adult generations living in the same household, 2022

The return to the table has boosted the popularity of shareable main dishes, reflected in the category's already substantial and growing sales. Foods like pizza, multi-serve dinners and entrees, sides and pot pies can fall under this umbrella of shareable mains.



These foods, designed to feed the whole table, totals roughly \$12 billion, approximately 13% of total frozen department dollars, and has grown at 1.3% annually over three years⁵.

Pizza and multi-serve meals lead the category with \$7.4 billion and nearly \$2.9 billion in sales, respectively⁶.



Frozen sides have driven the shareable mains category forward with 4% dollar growth annually⁷ over the last three years.



Gen Z households increased their shareable mains volume by 19% year-over-year⁸, underscoring the category's strong appeal among younger, family-forming consumers.

5. Circana, LLC, Total US - MULO+ with Conv, Frozen Subcategories as defined as "Shareable Mains" (including Fz Pizza, Multi Serve Fz Dinners/Entrees, Fz Side Dishes, Fz Pot Pies), Dollar Sales, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, Share of Dollars with in Total Frozen Department, 52WE September 21, 2025
6. Circana, LLC, Total US - MULO+ with Conv, Frozen Subcategories, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52WE September 21, 2025
7. Circana, LLC, Scan Panel, Total US - All Outlets, HH Generations, % Change Volume Sales vs Volume Sales Year Ago, 52WE October 5, 2025
8. Circana, LLC, Scan Panel, Total US - All Outlets, HH Generations, % Change Volume Sales vs Volume Sales Year Ago, 52WE October 5, 2025

Families are turning to frozen food as convenient, crowd-pleasing options that are ready whenever they're needed. Households with kids under the age of 12 are **63% more likely** to keep multi-serve meals on hand in the freezer, while large households (5+ persons) are **56% more likely**⁹.

These multi-serve formats, such as pizza and other bagged or tray meals, are making frequent appearances at the table, **showing up in 11 billion eating occasions in 2025**. This is a 29% increase since 2020, beating total frozen annual eatings growth by 2.2x¹⁰.



Frozen food for the family extends beyond convenient meals. As consumers are finding renewed excitement in building meals themselves, they're seeking support to make that process effortless. This balance between scratch and shortcut is where additional categories shine.

Today's home cooks are reaching for frozen components that make "homemade" feel easy. Pre-mixed stir-fry vegetables and seasoned grains allow consumers to customize their meals while maintaining the satisfaction of cooking from scratch. **Frozen stir fry products generate nearly \$100 million annually**, accounting for **one third of the total stir fry dollars** across the entire store¹¹.

9. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Kitchen Audit Foods on Hand or Usually, Total Frozen Bagged Meals – Multi-Serve, YE March 2025

10. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Frozen Meals/Entrees Sizing & Occasions, YE October 2025

11. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Department, Dollar Sales, Share of Frozen Dollars of Total Store, "Stir Fry" or "Stir Fried", 52WE October 19, 2025

Value-size products are becoming the go-to option.

With \$18.6 billion in sales, value-size frozen food now represents over 41% of the frozen aisle¹². These **large-format offerings have delivered 9% total dollar growth over three years**¹³.



Prepared chicken accounts for 42% of volume and 49% of dollars since 2022



Value-size vegetable dollars are up 13% in the same time period¹⁴

Value-size packs can also **lower the cost-per-serving by 20-30%** when shoppers trade up from small or medium packs to large or extra-large sizes¹⁵.

Consumers are embracing this return to **“feed the crowd”** moments, as online interest in shareable meals continues to climb.

Social mentions of casserole are up 14% year over year¹⁶, with seasonal searches spiking during the winter holiday months¹⁷.

A single recipe, **“broccoli cheddar chicken and rice casserole,”** alone earned 2.3 million clicks in 2025, up nearly 20% versus the prior year¹⁸.



Kitchen freezers sized between 7.5–10 cubic feet of space and can hold up to 35lbs of food per cubic foot. This means you could store up to 93 60oz bagged multi-serve meals in your freezer at one time¹⁹.

12. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Multi Pack/ Multi Serve, Frozen Large Format Dollar Sales, Share of Total Frozen Dollar Sales, 52WE September 21, 2025

13. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Multi Pack/ Multi Serve, Frozen Large Format % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52WE September 21, 2025

14. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Multi Pack/ Multi Serve by Category, Frozen Large Format % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52WE September 21, 2025

15. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Multi Pack/ Multi Serve, Price Per Volume, 52WE September 21, 2025. Pack Sizes are segmented into Small, Medium, Large and Extra Large based on ounce size. Ounce breaks vary by category

16. Tastewise, Social Conversation Volume vs. YA, 12 Months Ended September 2025

17. Similarweb, Google Search, Searches for “Casserole”, 12 Months Ended September 2025

18. Similarweb, Clicks/Recipe Visits/Counts, Searches for “Casserole”, 12 Months Ended September 2025

19. Whirlpool, “Standard Freezer Sizes & Dimensions”

The winter holiday season is not the only time of year that sees increased activity for family-style options. **Summer dessert searches for peach, apple and blueberry cobbler account for over 2 million monthly search queries** combined across peak barbecue months, including June, July and August²⁰. These signals confirm that cooking and eating together, from casseroles to cobblers, is culturally resonant again.

Birds Eye® stir fry mixes and large format vegetables make shareable sides easy,

including the Deluxe Stir-Fry that offers two pounds of shoestring carrots, broccoli florets, sugar snap peas, red bell peppers, mushrooms and baby corn.



Marie Callender's® Cheesy Chicken & Rice Family Size Entree offers a way to simplify family dinner

with savory pieces of chicken breast, rice and broccoli covered in an irresistibly rich and creamy cheese sauce. Delivering 36 ounces of food, this dish contains about four servings.

Dolly Parton's™ frozen desserts celebrate summer togetherness with a nostalgic, crowd pleasing sweet.

Perfectly topped with a scoop of vanilla ice cream or whipped cream, desserts like the **Biscuit Batter Peach Cobbler** bring eight servings of decadence to the table.



20. Similarweb, Google Search, Searches for "Cobbler", 12 Months Ended September 2025



TREND 4
**Rise And Dine,
The Breakfast Evolution**

TREND 4

RISE AND DINE: THE BREAKFAST EVOLUTION

Breakfast has broken free from the morning, now considered a meal or snack for any time of day. **With 82% of breakfasts eaten at home¹, preparation tends to be quick and simple**, much like brewing a cup of coffee before heading out the door.

Consumers now consider breakfast a flavor and format they crave around the clock, from mid-morning bites to late-night comfort.

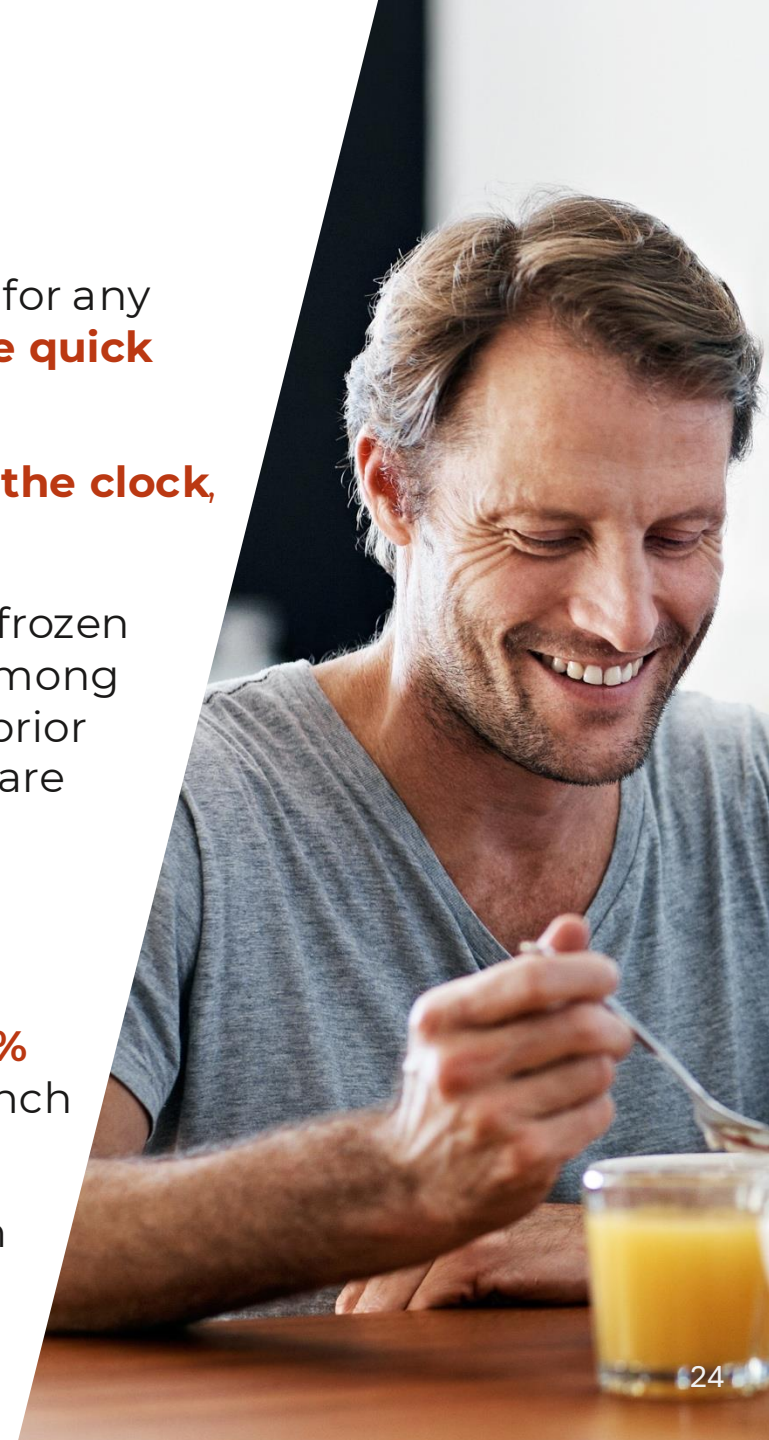
While total frozen eating occasions are up 3% over five years, the **growth is being fueled by breakfast**, surpassing total category growth at 5%³.



Lunch occasions involving frozen breakfast items rose **18%** among all consumers against the prior year. Younger generations are leading this trend:

- **Gen Z is up 19%** during the lunch hour
- **Gen Alpha is also up 13%** for breakfast items at lunch
- **Millennials** are bringing breakfast to dinner, with a **29%** increase² over the prior year.

1. Circana/National Eating Trends®, Sourced from Home/Retail, Trend in Meals & Snacks, YE March 2025
2. Circana, National Eating Trends®, Sourced from Home/Retail, Trended Frozen Breakfast Food Occasions, YE September 2025
3. Circana, National Eating Trends®, Sourced from Home/Retail, Frozen Food Summary x Occasions, YE August 2025



While pancakes and hashbrowns remain breakfast staples, it's the energy dense-fuel-forward formats that are gaining traction along with convenience.

When it comes to actual behavior, consumers are choosing products that keep them full longer, are high in protein, and are nutritious.

Value proteins are powering the surge. Frozen breakfast sausage totals **\$3.6 billion**, with dollar sales growing 5% annually over the past three years. Younger households are leading this trend, as Gen Z and Millennials lifted volume sales 15% year over year, which is **2.6x faster** than total households⁷.

Breakfast sausage wins on protein and economics, showing up in handhelds, scrambles, and bowls to deliver filling meals at an approachable cost per serving.

95% of consumers express positive sentiment about the convenience of frozen breakfast items, and **70% praise their nutritional value**⁵.

Online, interest in high-protein breakfast recipes is **up 9%**, and high-fiber recipes is **up 47%** versus last year⁶.



5. Yogi Consumer Insights Platform (meetyogi.com), Frozen Breakfast, YE November 8, 2025

6. Similarweb, Google Search, Food and Beverage Websites, Searches for "High Protein", 12 Months Ended September 2025

7. Circana, LLC, Scan Panel, Total US - All Outlets, Frozen Breakfast Sausage, HH Generations, % Change Volume Sales vs Volume Sales Year Ago, 52WE October 5, 2025

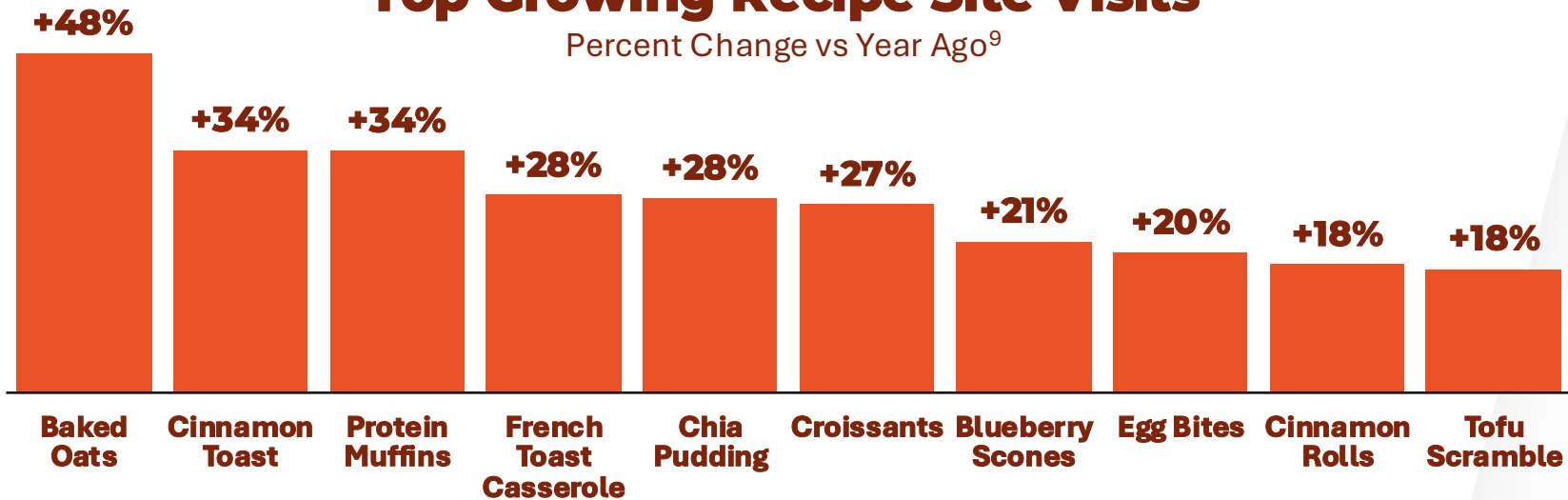
Top emerging breakfast recipes reveal the desire to balance functional, nutrition-forward protein muffins, egg bites and chia pudding with craveable indulgences like cinnamon toast and croissants. The next step for frozen breakfast will be to bring these at-home recipes to convenient, ready-to-heat or thawable formats, providing value, taste and nutrition.

With **16% of the category's volume in the last year coming from innovation⁸**, momentum is building behind this consumer-driven excitement. Morning, afternoon or night, breakfast has evolved beyond its traditional time slot.



Top Growing Recipe Site Visits

Percent Change vs Year Ago⁹



8. Circana, LLC, Total US - MULO+ with Conv, Total Frozen Subcategory 3YR Innovation, % of Dollar Sales from UPCs with zero Dollar Sales 3 Years Ago, 52WE September 21, 2025

9. Similarweb, Google Search, Food and Beverage Websites, Multiple Search Terms, 12 Months Ended September 2025

What's Next for Frozen Food

Frozen food is set for continued growth as it becomes an even bigger part of how America eats. Expanding households, younger generations entering family years, and multigenerational living are fueling more meals at home, and frozen food remains one of the most convenient, affordable way to feed everyone.



Shoppers are redefining health around **balance and real food**, making frozen foods that are naturally preserved, high in protein, and made with simple-ingredients more relevant than ever.



At the same time, growth in **breakfast, lunch and between meal** occasions shows that frozen food now meets every need, from core nourishment to exciting indulgence.

As dining out costs rise and consumers prioritize proactive health and value, frozen food will keep leading. It's no longer just a department; it's the modern way America eats.



About Conagra Brands

Conagra Brands, Inc. (NYSE: CAG), is one of North America's leading branded food companies. We combine a 100-year history of making quality food with agility and a relentless focus on collaboration and innovation. The company's portfolio is continuously evolving to satisfy consumers' ever-changing food preferences. Conagra's brands include Birds Eye®, Duncan Hines®, Healthy Choice®, Marie Callender's®, Reddi-wip®, Slim Jim®, Angie's® BOOMCHICKAPOP®, and many more. As a corporate citizen, we aim to do what's right for our business, our employees, our communities and the world. Headquartered in Chicago, Conagra Brands generated fiscal 2025 net sales of nearly \$12 billion. For more information, visit www.conagrabrands.com.



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