Shopper attitudes toward frozen foods have shifted. Some only buy specific categories because they believe them to be healthier. 68% of shoppers feel fresh is healthier. 48% of Gen X, 48% of Boomers, and 54% of Millennials believe fresh is healthier.
WAYS TO WIN

BE A SOLUTION
Shoppers living fast-paced lives with limited time want quick & easy options.

STAND FOR SOMETHING
Make your stance known whether it's no GMO, no high fructose corn syrup, trans fat-free, etc.

BE INNOVATIVE
Shoppers crave variety; offer restaurant-inspired original flavors

HEALTH & WELLNESS IS KEY
Steer toward ‘real’ ingredients, reformulate recipes, and offer healthy indulgences.

Many buy natural/organic because they feel it's better for them

Even with all these changes, some are buying frozen more frequently

% Shopping More Frequently vs. Year Ago

<table>
<thead>
<tr>
<th>Category</th>
<th>% Shopping More Frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>MILLENNIALS</td>
<td><img src="http://" alt="" /> 43%</td>
</tr>
<tr>
<td>GEN X</td>
<td>27%</td>
</tr>
<tr>
<td>BOOMERS</td>
<td>19%</td>
</tr>
<tr>
<td>SILENT</td>
<td>20%</td>
</tr>
</tbody>
</table>

WHAT DO MILLENNIALS VALUE IN FROZEN FOODS?

- 89% quick dinner solution
- 72% convenient lunch
- 81% convenient breakfast for kids
- 78% side dishes

OPPORTUNITIES DRIVEN BY MEGA TRENDS HEALTH & WELLNESS, CONVENIENCE, INDULGENCE, AND VARIETY EXIST

- **Breakfast**
  - +2.0%
  - burritos
  - frittatas
  - bowls

- **Side Dishes**
  - +8.0%
  - alternative grains

- **Complete Meals**
  - -1.6%
  - vegetarian
  - better ingredients
  - more flavor options

- **Ice Cream**
  - +8.0%
  - “healthy” ice cream

- **Cauliflower**
  - +59.3%
  - mainstream items in veggie form: rice, tots