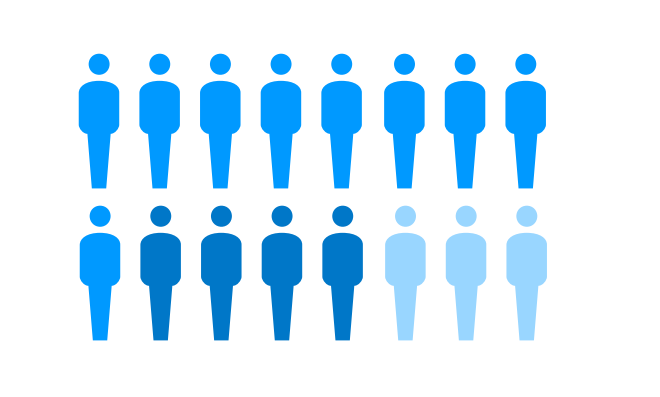
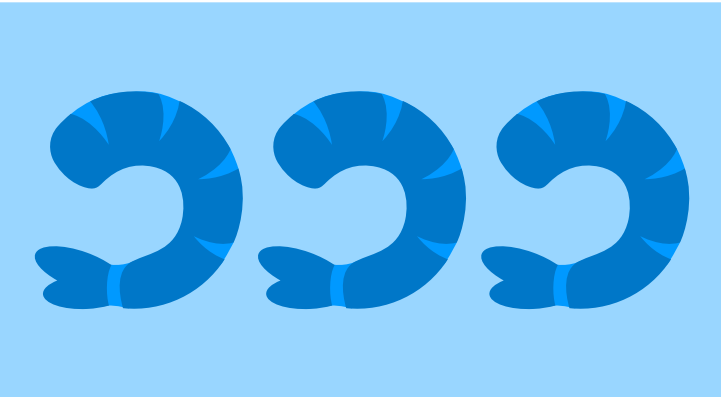
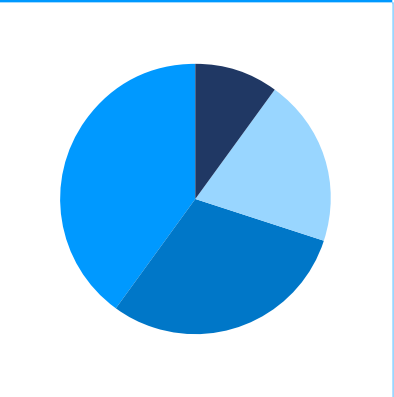




Frozen in Focus



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About this report

Frozen food is entering a new era – one where its value is being increasingly recognised beyond convenience. This growing appreciation is reflected in changing consumer behaviour, with nearly a third (29%) of consumers using their freezer more in the last five years.¹

The frozen food industry is poised for significant growth, with the total European frozen food market currently sized at approximately €55 billion today.² To understand the evolving role frozen food plays in consumers' lives now and in the years to come, our first-ever Frozen in Focus report – which surveyed over 7,500 adults across the UK, France, Germany, Italy and Sweden – outlines the different roles that frozen food (and freezers) plays in consumers' lives in 2025.



Foreword from CEO

"Over a century on from the invention of flash freezing by Clarence Birdseye, it is fair to say that not only has the frozen food category stood the test of time, but it has also become a much-loved staple on the plates of millions, all over Europe. This is testament to the category's enduring appeal and convenience.

Back in 2015, Nomad Foods embarked on a mission to redefine frozen food focusing on taste and innovation, sustainable sourcing and nutritional value. We believed then, as we do now, that frozen food could and should be both delicious and nutritious.

Ten years on and Nomad Foods is Europe's leading frozen food company, uniquely positioned to champion a new era for the category. Whilst we've seen significant progress, we recognise that there is still work to be done in shifting long-held perceptions. Despite the strides made, frozen food is still too often viewed through an outdated lens. We are committed to challenging these misconceptions, elevating the category's reputation for taste, quality, nutrition and value.

We're proud to introduce "Frozen in Focus", our first annual report highlighting the current state of the industry and the very latest insights on its future through the eyes of both our own Birds Eye, Ledo, iglo, Findus and Frikom experts, and over seven thousand European consumers.



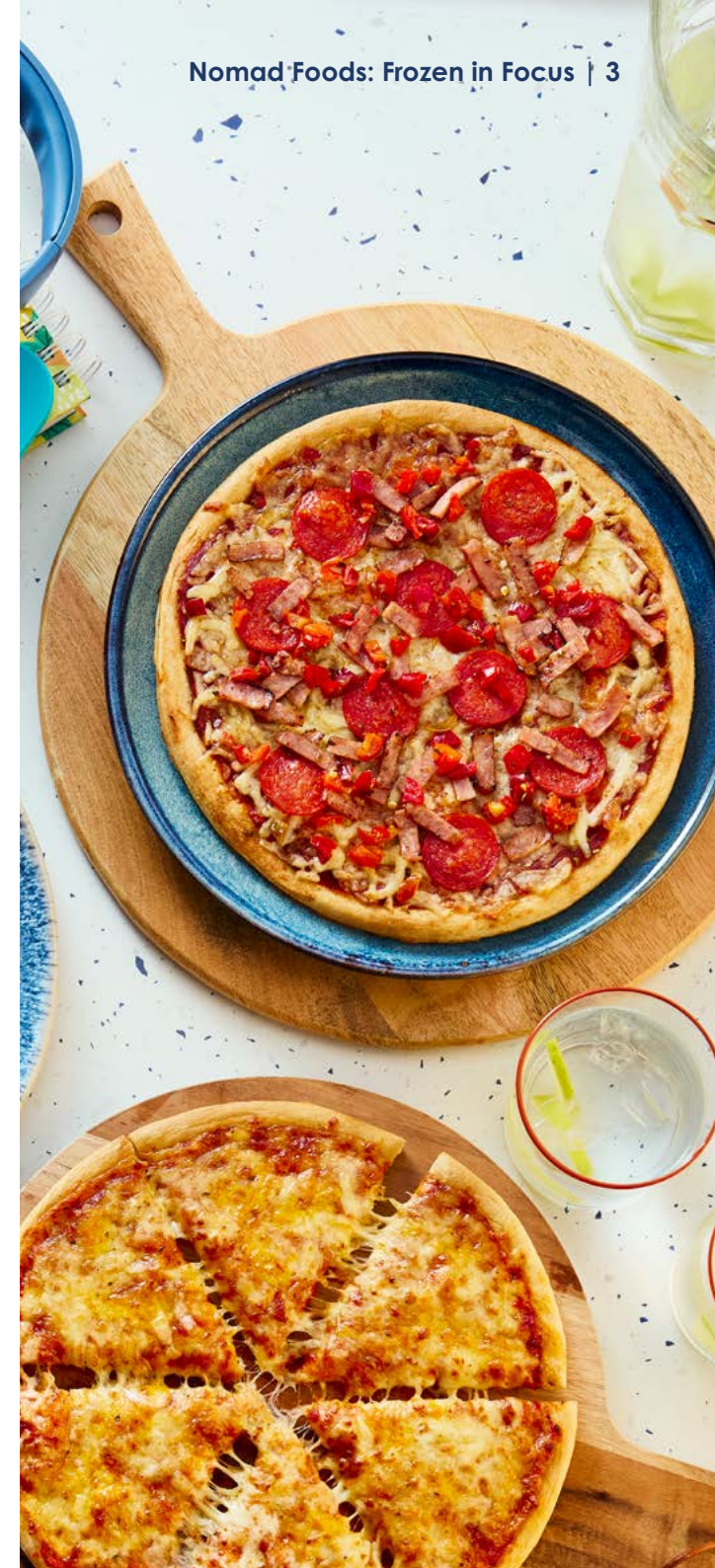
In this report, we explore the underlying drivers shaping consumer behaviour, to deliver a comprehensive assessment of the current landscape. We also consider the crucial role frozen food can play in addressing key global issues like food waste, affordability and accessible good nutrition.

Over the past decade, we've witnessed a significant shift towards frozen food as its goodness has made mealtimes better. Consumers are increasingly recognising its nutritional value, its great taste and quality, its ability to reduce food waste, its convenience, and its affordability. But the journey isn't over. Changing perceptions is an ongoing effort and one that will require continued innovation, transparency and advocacy.

The category provides choice, empowering consumers to make healthier, more sustainable, and more time-friendly decisions. This report tells the full story.

We are proud to have been at the forefront of this evolution, working with our numerous partners including customers, suppliers, retailers and governments to inspire change. As we look ahead to the future, we remain committed to making mealtimes better with the goodness of frozen food."

Stéfán Descheemaeker, CEO, Nomad Foods



Nomad Foods at a glance

The undisputed leader in European frozen food



Over

€3.1 billion
net revenues



9

consecutive years of
top and bottom-line
growth



8000+
employees



Operations in

22 markets
across Europe

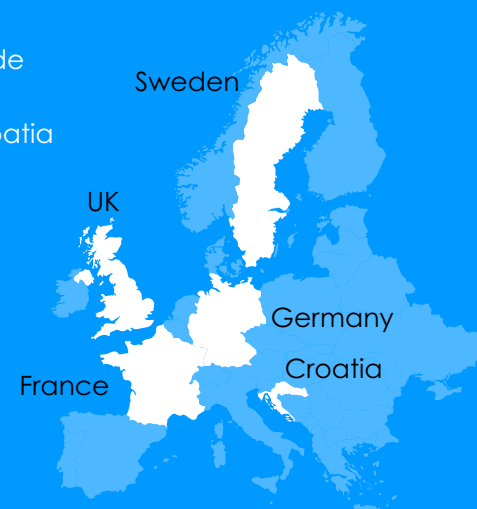


Our largest markets include
the UK, Germany, Italy,
France, Sweden, and Croatia

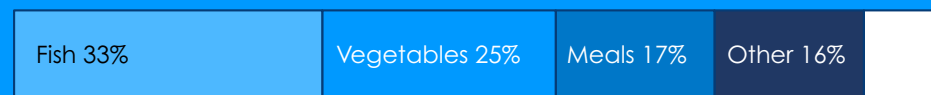


18%

share in Western
Europe's frozen
food market



Our portfolio split is:



Chicken 9%



Vegetables and protein make
up two thirds of our revenues.

Consumer favourite brands include:



Chapter 1: The Goodness of Frozen

Frozen food plays a vital role in helping consumers create tasty, nutritious and well-balanced meals, with 77% of Europeans finding the freezer useful for storing healthy food options.³ However, when viewing frozen products in isolation, it is important to also consider how they contribute to overall dietary quality and mealtime nutritional value.

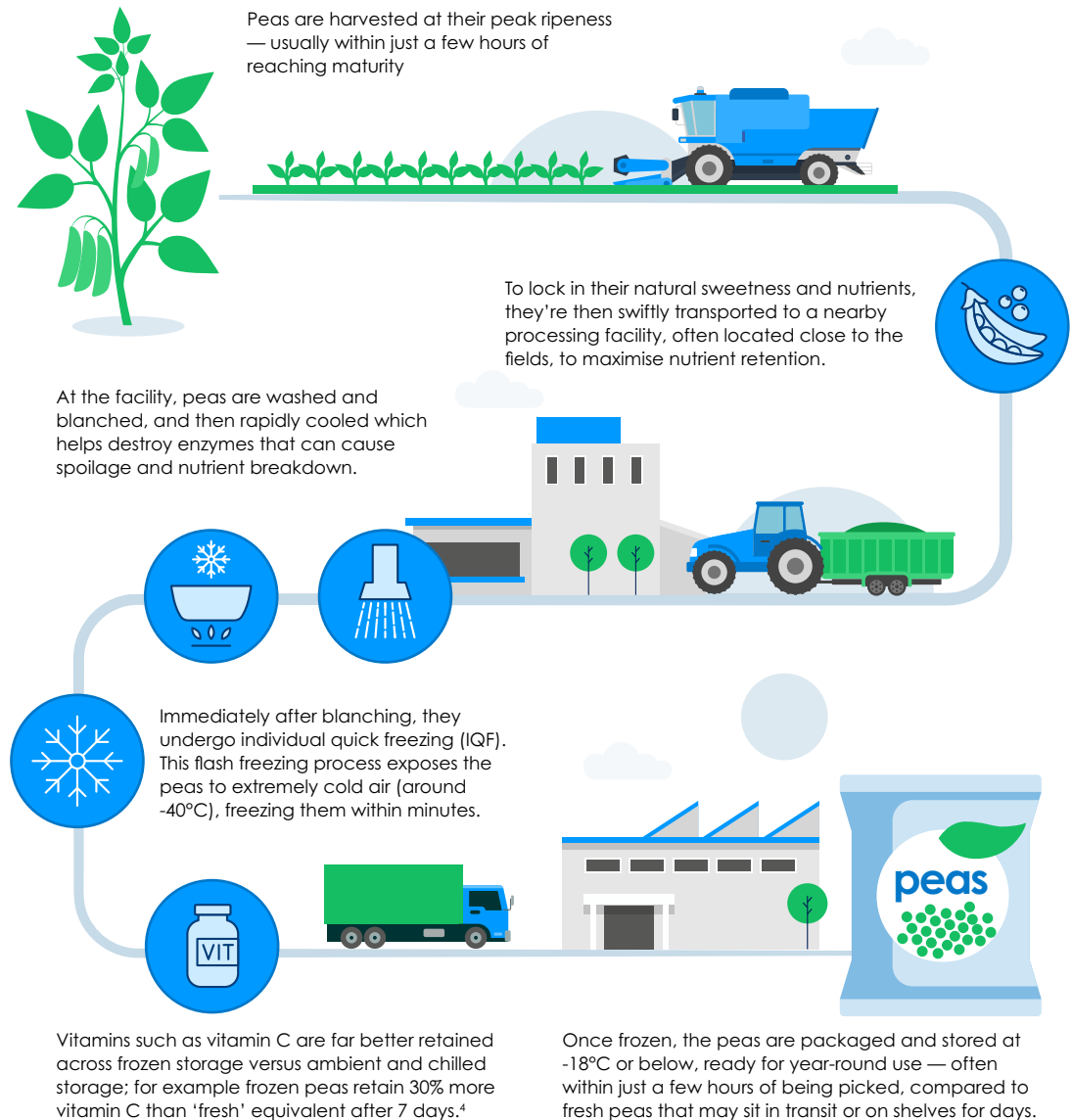
Bridging the Perception Gap

The evidence supporting the nutritional excellence of frozen food is compelling and scientifically robust. When vegetables and fruits are flash-frozen shortly after harvest, they lock in nutrients at their peak, preserving essential vitamins and minerals that would otherwise degrade during transportation and storage of fresh produce.

Despite the excellent nutritional retention benefits of freezing, our research reveals a significant understanding gap between the scientific reality and consumer perception.

Whilst 63% of consumers now recognise that frozen food is at least as nutritious as fresh equivalents, only 21% understand that frozen options can actually be nutritionally superior to fresh or chilled alternatives in many instances.⁵ This represents a critical knowledge gap that can impact daily dietary choices across Europe.

Pea harvesting – from farm to freezer



Simplifying Healthy Eating for Busy Lives

Frozen food can provide highly nutritious options that are both convenient and accessible. The freezer represents a hero of nutrition, taste and quality, yet is often underutilised by consumers. Freezers can support people to create varied, healthy and balanced meals, in a convenient, affordable and sustainable manner.

With 88% of Europeans valuing healthiness when making food choices, frozen food enables access to nutritious options year-round whilst meeting evolving dietary preferences and needs.⁶

Despite perception challenges, consumption patterns reveal growing acceptance, with 42% of adults across Europe incorporating frozen food or ingredients into their meals two-to-four times per week, and almost one in five use frozen options five-to-nine times weekly. These figures demonstrate that frozen food has become central to many everyday mealtimes, contributing to varied and balanced diets.

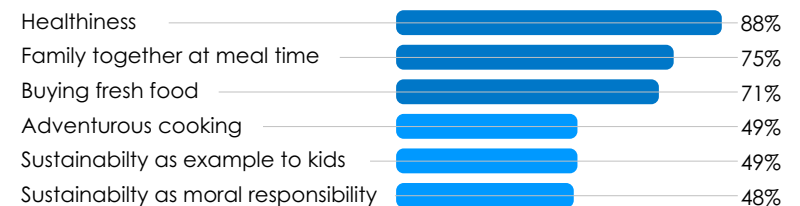
Over a third (39%) of consumers already appreciate how frozen food allows them to cook meals using seasonal ingredients, regardless of the time of year. This year-round access supports overall dietary quality and variety, reducing the risk of nutritional gaps that might occur when relying solely on seasonal foods such as specific fish species and vegetables when they are available at certain points in the year.

Across Europe, although there are slight differences per market, on average 63% of consumers believe that frozen foods are just as nutritious as fresh – dropping slightly for those residing in Sweden (56%) and Italy (58%). However, across all countries polled, it seems that France is the most open to Frozen food, with 72% of respondents stating they understand the nutritional benefits of frozen food.

88%

of UK consumers
value healthiness

Health Value in the UK



However, there is a generational perception gap of the nutritional value of frozen food across Europe with younger people, 18-24-year-olds, reporting they view frozen as less nutritious than their older counterparts.

In Germany, only 28% of 18–24-year-olds believe frozen foods are just as nutritious as fresh compared to 73% of 55-year-olds and over. In Sweden, 37% of 18–24-year-olds believe frozen foods are just as nutritious as fresh compared to 63% of 55-year-olds and over.⁷ This underlines that frozen food, despite its benefits, can sometimes be miscategorised by different age groups who may have experienced frozen food differently.

Shaping a Better Food System

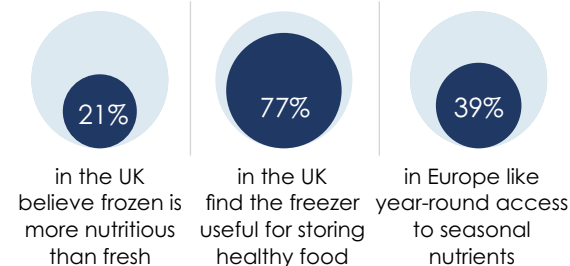
As populations continue to seek convenient access to balanced nutrition, addressing misconceptions about frozen food takes on even greater significance. Consumers need to feel confident that when they purchase from a Nomad Foods brand, they are making a positive choice that reflect their needs, preferences and health now, and in the future.

The nutritional reality of frozen food represents a significant opportunity to improve dietary quality across Europe. By empowering consumers to create nutritious and tasty meals conveniently using frozen components and ingredients, Nomad Foods can help shape a better food system that makes healthy eating more accessible, convenient and achievable for everyone.

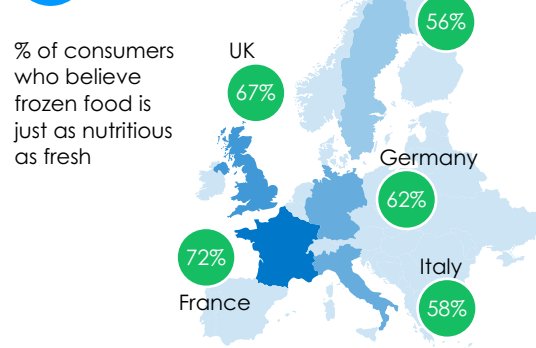
Nutritional Perception of Frozen Food



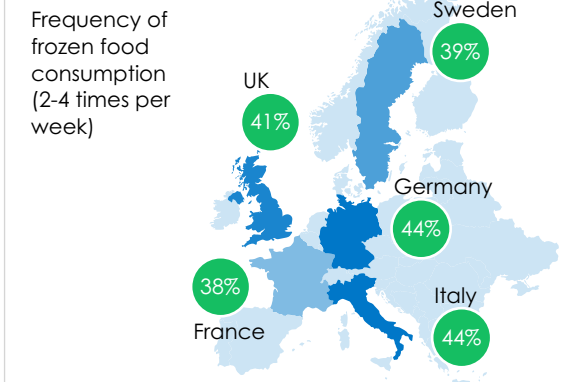
Nutritional Benefits Perception



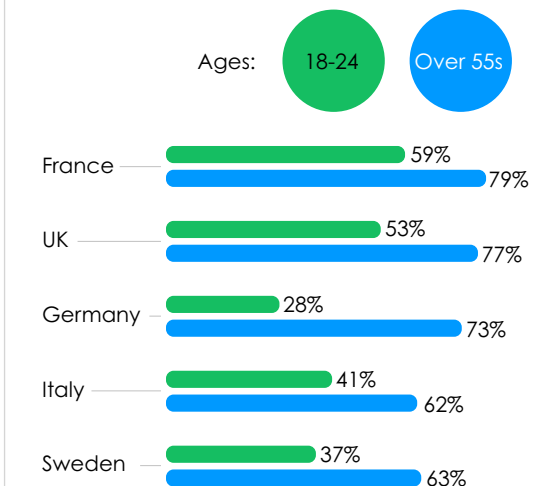
Regional Comparison



Regional Variations in Frozen Food Usage



Age Group Perception Gap: % who believe frozen foods are just as nutritious as fresh





“



“The nutritional benefits of frozen food are backed by science. When we freeze foods, we’re essentially pressing pause on nutrient loss, keeping foods at their best and maximising nutritional retention. Additionally, the inherent convenience of frozen foods makes it a positive enabler of consumers adopting healthier and more varied diets. Consumers are increasingly recognising these benefits, with almost two-thirds now understanding that frozen can be just as nutritious as fresh. At Nomad Foods, we’re committed to not only preserving nutrition through freezing, but also to continuously improving the nutritional profiles of our products to help consumers create balanced, nourishing meals every day of the week.”

**Lauren Woodley, Head of Nutrition and Sensory Science,
Nomad Foods**

Chapter 2: Consumer Habits

The freezer has become an indispensable appliance in European households. In fact, nearly six-in-ten Europeans (59%) agree that they can't live without their freezer. This statistic underscores the vital role freezers play in shaping consumer habits and food priorities.

As with all kitchen household appliances, the way consumers use their freezers offers a revealing insight into food priorities. There are many reasons why frozen food appears on people's plates, ranging from saving time (51%) and reducing food waste (47%), to reducing trips to the supermarket (45%).⁸

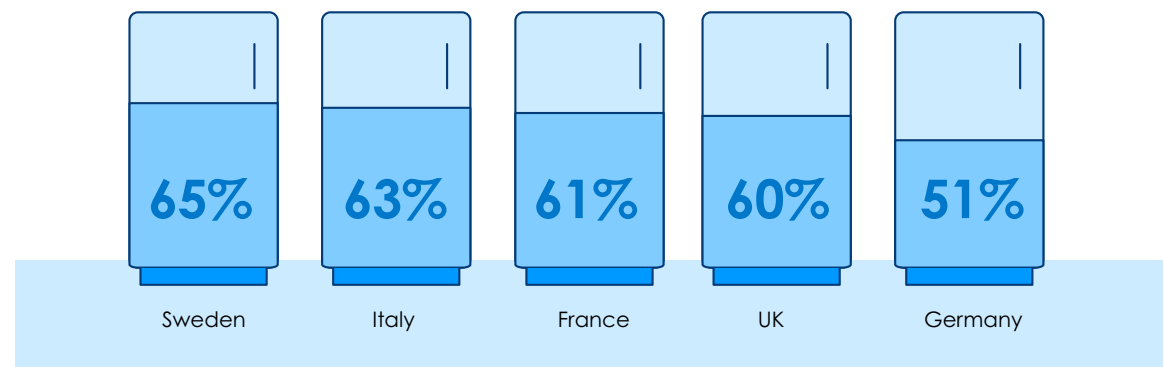
No shame in consuming frozen

Encouragingly, an overwhelming 93% of European consumers do not feel guilty when using frozen food or frozen food ingredients stored in their freezers.⁹ The numbers are consistently high across different age groups with 98% of over 55s saying they feel no guilt or shame, compared to 85% of 18–21-year-olds.¹⁰

While nearly half of Europeans (45%) are comfortable serving frozen food to guests, our data reveals that a stigma persists, as 25% remain unwilling to do so. This reluctance changes across markets and cultures – with the UK (56%) and Italy (55%) saying they are happy to serve frozen food to guests versus only a quarter (24%) in Germany.¹¹

Europeans can't live without their freezers

% who agree they can't live without their freezers



93%

do not feel guilt or shame when using frozen food or frozen food ingredients stored in their freezers



30%

admit they would love to own a second freezer



35%

wish their freezers were bigger with that figure rising to 41% among those aged 25 to 34



51%

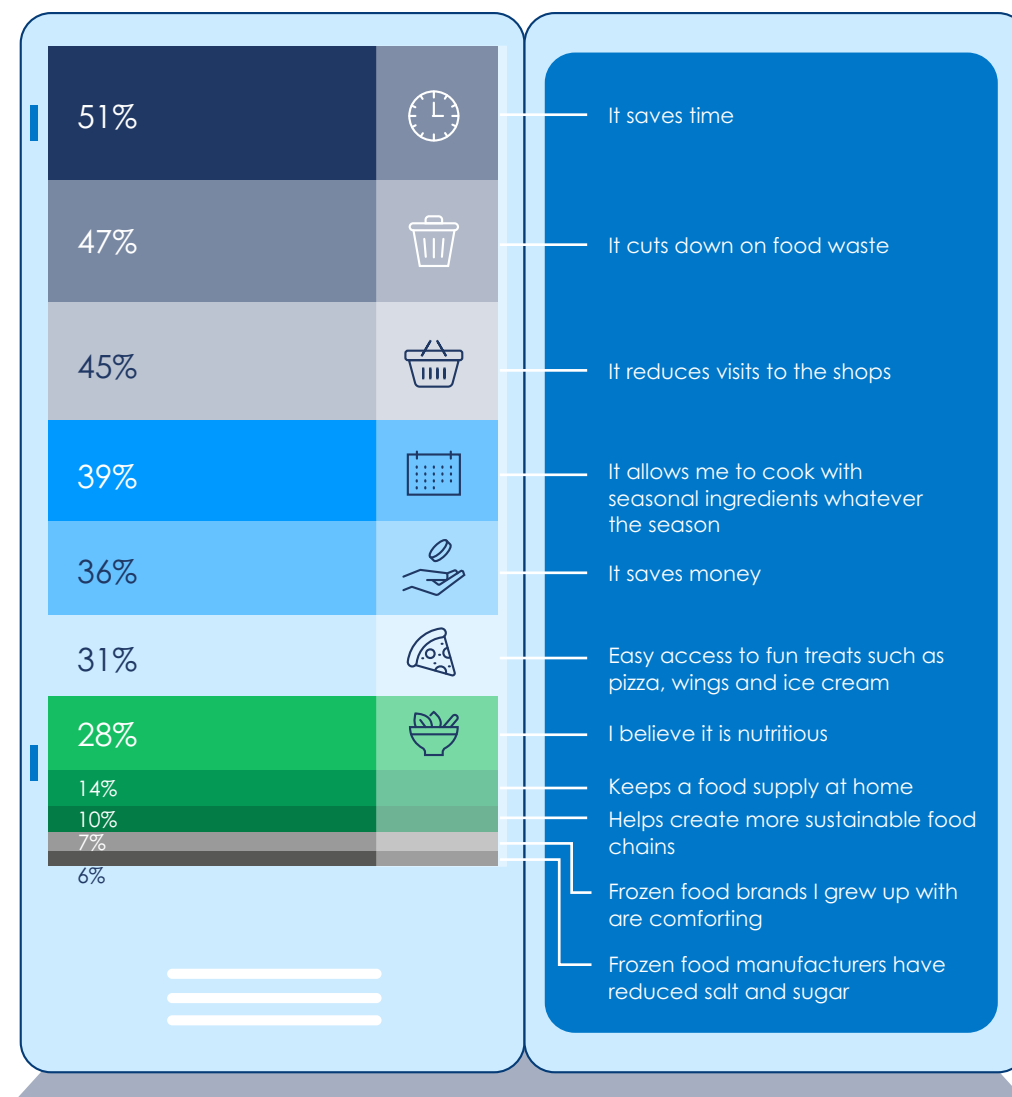
tailor shopping habits based on how much freezer storage is available

What's in your freezer?

Despite 74% of consumers stating that they are using their freezer efficiently, by keeping it well stocked and regularly checking the contents – nearly a fifth (17%) think they could save an average of €7-12 per week if they knew what was in their freezer. That's a yearly saving of around €620.¹²

When it comes to freezer space, more than a third of consumers (35%) wish their freezers were bigger, with that figure rising to 41% among those aged 25 to 34. A third (30%) admit they would love to own a second freezer. More than half also (51%) admit that they tailor shopping habits based on how much freezer storage is available.¹³

Why Europe loves frozen food



The freezer and the air fryer

Technological advancements are also playing a key role in the resurgence of frozen food. The rise of kitchen gadgets like air fryers, smart appliances and recently, kitchen robots, have revolutionised the way consumers prepare frozen meals, offering a more efficient cooking method that delivers quick and flavourful food when people are time poor.

The air fryer is proving to be a valuable partner for the freezer in food preparation. Its use is becoming more widespread than ever. Six out of ten households in the UK own an air fryer, while almost half of Italian homes (47%) own the appliance – the same as in Germany.¹⁴

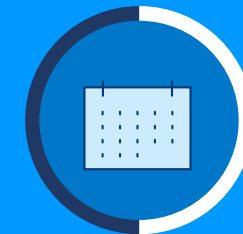
Air fryers are not sitting idle in people's kitchens either. At least 75% of people across the UK, France, Germany, Italy and Sweden who own air-fryers use them every month, nearly half use them at least once a week. While in Portugal, 1 in 5 people are specifically using them to prepare products like fish fingers.¹⁵

One of the biggest advantages of the air fryer is faster cooking times compared to a conventional oven, thanks to the hot air that is circulated rapidly around the food. This makes it a valuable appliance and fulfils consumer's desires of enjoying tasty, nutritious food prepared quickly.



75%

of people with air fryers use them every month.



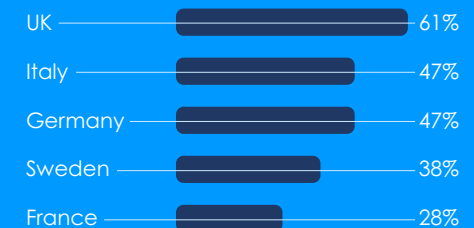
nearly half use them at least once a week.



50%

of those surveyed, the air fryer is regarded as "much needed family helper".

Households that own an air fryer.¹⁴





“Consumers are increasingly shedding the perception of frozen food as a lower-quality option. Instead, they are embracing it as a vital and delicious source of nourishment, proudly serving meals from the freezer to friends, family, and guests.

No longer a guilty pleasure, frozen food empowers consumers, with freezer space often dictating shopping habits. Any previous misconception surrounding frozen food consumption is now being replaced by a sense of enjoyment and practicality.”

**Alex Hardy, Consumer & Market Insights and Analytics
Director, Nomad Foods**

Chapter 3: Innovation & Inspiration

For many, food is a source of personal expression and, driven by practicality and innovation, people often explore new recipes, tools and techniques when it comes to cooking. With nearly a third of consumers (28%) cooking more at home over the past year¹⁶, the accessibility of frozen food also enables streamlined meal preparation, giving households precious time to connect and enjoy each other's company.



44%

believe that the freezer is underrated, while only 16% disagree with this notion



28%

of respondents say using frozen food allows them to spend more time with family and friends

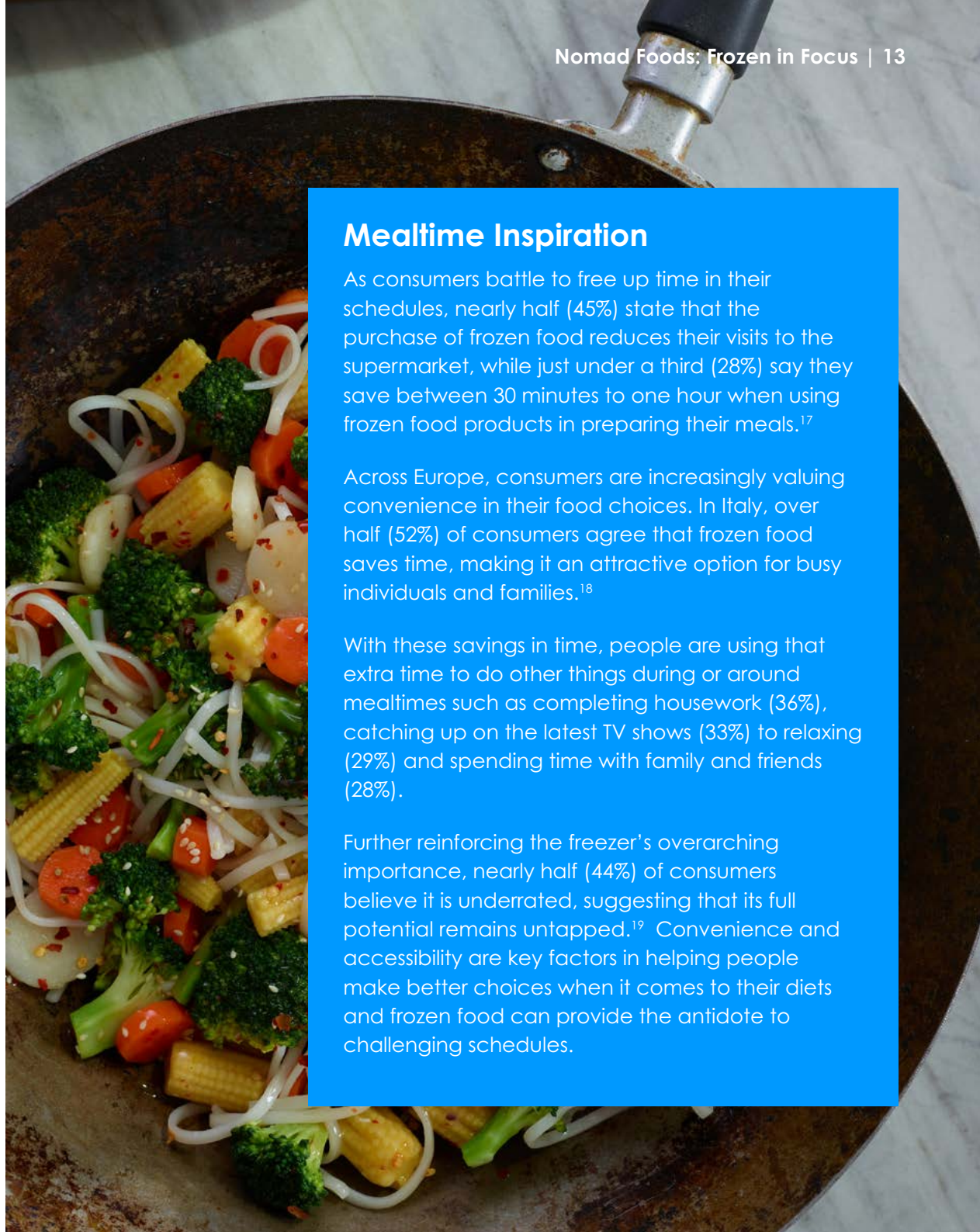
Mealtime Inspiration

As consumers battle to free up time in their schedules, nearly half (45%) state that the purchase of frozen food reduces their visits to the supermarket, while just under a third (28%) say they save between 30 minutes to one hour when using frozen food products in preparing their meals.¹⁷

Across Europe, consumers are increasingly valuing convenience in their food choices. In Italy, over half (52%) of consumers agree that frozen food saves time, making it an attractive option for busy individuals and families.¹⁸

With these savings in time, people are using that extra time to do other things during or around mealtimes such as completing housework (36%), catching up on the latest TV shows (33%) to relaxing (29%) and spending time with family and friends (28%).

Further reinforcing the freezer's overarching importance, nearly half (44%) of consumers believe it is underrated, suggesting that its full potential remains untapped.¹⁹ Convenience and accessibility are key factors in helping people make better choices when it comes to their diets and frozen food can provide the antidote to challenging schedules.



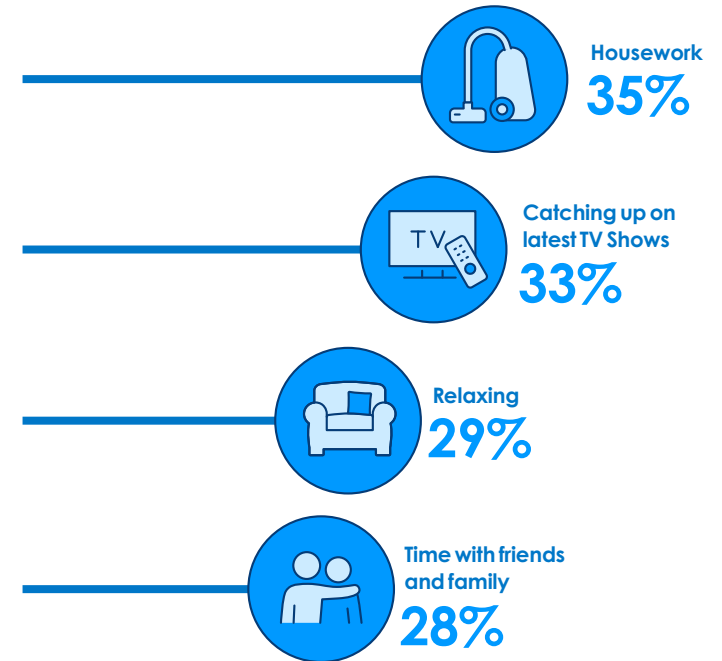
Frozen Creativity

People are also increasingly embracing frozen meals and ingredients, thanks to greater innovation and creativity in product offerings, cooking techniques and culinary inspiration from the category.

New product ranges in frozen food are being designed so that all flavours are infused during the steaming process. This is apparent with Birds Eye's Steamfresh range under its sub-brand of veg and veg-based products such as Steamfresh Mediterranean Pasta or Steamfresh Mushroom Tagliatelle which provides 6.4 - 9.6g fibre per portion.

Packaging and cooking methods are leveraging the power of steam to deliver a superior product experience compared to traditional frozen vegetables. This range is cooked using nutrient-retaining microwave steaming and in its first nine months on the market, has added more than 3.5 million additional portions of veg onto the nation's plates.

Using a freezer makes more time for:



“



“As people’s lives evolve, so does their approach to food consumption. Consumers are eager to reclaim time and strengthen connections with friends and loved ones, all while savouring high-quality, delicious meals. Frozen food has shed its outdated image and emerged as a modern culinary delight, thanks to chef-inspired recipes and cutting-edge technology.

More and more individuals are turning to frozen food for its exceptional nutritional value, quality and taste, as well as its unparalleled convenience, which makes it easier to enjoy meaningful experiences with loved ones.”

Carly Arnold, Chief RDQ Officer, Nomad Foods

Chapter 4: Sustainability

The freezer, and the frozen food it preserves, is poised to play a vital role in building a more sustainable food system. When food goes to waste, it is not only the food itself that is lost, but also the resources used in production and transportation: including fuel, water, land, labour, fertilisers, and packaging.

59%

of UK consumers say they consume frozen food because it cuts down on food waste



This is followed by 50% in Italy, 49% in France, 43% in Sweden, and in 44% Germany.

The Fight Against Food Waste

In the EU, nearly 59 million tonnes of food waste is generated annually.²⁰ One of the most compelling arguments for embracing frozen food lies in its ability to significantly reduce food waste within households – with nearly half of consumers (47%) opting for frozen products to reduce food wastage.²¹

Simple solutions like freezing can play a crucial role in reducing this waste. Freezing extends the shelf life of food naturally, without the need for added ingredients or preservatives, empowering consumers to make the most of their food purchases.

Across Europe, people are increasingly recognising the benefit of frozen food in reducing waste, a trend driven by a growing sustainability awareness. The UK leads the way, with 59% of consumers preferring to buy frozen food as it reduces food waste, followed by 50% in Italy, 49% in France, 43% in Sweden, and in 44% Germany.²²

Moreover, a significant portion of consumers across Europe recognize the

potential of frozen food to contribute to more sustainable food chains, with 15% in Sweden, 7% in Italy, 9% in the UK, 8% in Germany, and 7% in France agreeing with this statement.²³

This is further emphasised by the fact that 14% of consumers say the pandemic showed them the importance of keeping an adequate supply of food in storage, highlighting the value of frozen food in providing food security.²⁴

Beyond environmental benefits, embracing frozen food can also lead to significant cost savings for households. By reducing waste, families can minimise their grocery bills and make their food budgets stretch further.

However, access to adequate freezer space remains a key challenge, with almost three in ten (27%) respondents reporting “too little freezer space” as the biggest barrier to consuming more frozen food, suggesting that expanding freezer capacity could unlock further food waste reduction.²⁵

The Move to -15°C

Through initiatives like “The Move to -15°C”, Nomad Foods is actively working to reduce energy consumption and minimise its environmental impact.

By collaborating with industry partners and investing in innovative technologies, Nomad Foods is striving to make frozen food an even more sustainable choice for consumers.

Despite the growing awareness of the link between frozen food and sustainability, misconceptions persist. Some consumers, for example, believe that the freezing process is energy intensive. It is crucial to address these concerns and highlight the environmental benefits of frozen food throughout its entire lifecycle, cradle to grave or farm to fork.



In the EU, nearly

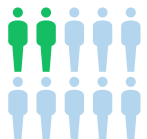
59 million

tonnes of food waste is generated annually, estimated to amount to 132 billion euros (European Commission)



47%

prefer to buy frozen food as it reduces food waste



23%

only disagree with the statement that they prefer to buy frozen as it reduces food waste

“



“European consumers are increasingly aware of the link between food waste and sustainability. At Nomad Foods, we’re committed to providing frozen food solutions that help families reduce waste, save money, and make choices that benefit both their wallets and the planet. Freezing food isn’t just about convenience; it’s a powerful tool for preserving freshness, maximizing resources, and building a more sustainable food system.”

**David Pettet, Head of Sustainability,
Nomad Foods**

Chapter 5: Future of Frozen

In today's society, European consumers squeezed by time constraints, tighter budgets, and a growing awareness of good nutrition and sustainability, are rethinking their relationship with food. Over the next year, Nomad Foods predict these key trends will reshape the frozen food aisle and continue to fuel a significant reappraisal of frozen.



Culinary Diversity:

Europe's increasing cultural diversity drives demand for foods that are more traditional to specific ethnic communities, as well as broader exploration in terms of flavour. For example, the popular Birds Eye Captain Discoveries range enables consumers access to frozen fish products with flavours inspired by the Mediterranean, Mexico and India, bringing exotic cuisine to every dinner table. Alternatively, culinary diversity can also be found in the sophistication of meals made at home. For example, the Findus Tentazione di Gusto range, which comprises of different types of seafood, enables consumers to elevate their mealtimes with options ranging from prawns to clams and squid.



Snackification:

Changing lifestyles and the need for convenience is disrupting traditional mealtimes, creating opportunities for new frozen snacking products and occasions. Consumers are enjoying sharing-sized portions of snacks like Belgian fries, alongside other options like frozen spinach and macaroni meals. The Findus 'Tasty Bites' range is an example of quick and ready-to-go snacks, which help consumers to stay nourished during their busy days. The trend towards increased snacking, driven by busy schedules and changing dietary preferences, has disrupted the traditional three meals a day paradigm with 36% of European consumers preferring to eat smaller meals or snacks throughout the day rather than larger meals at set points.²⁶

3



The TikTok Freezer Aisle:

Social media, particularly visually-driven platforms like TikTok, is fuelling a frozen food renaissance. By democratising access to visually appealing meals and innovative cooking techniques, these platforms are empowering home cooks to create high-quality meals affordably. This trend is evident in the rising popularity of kitchen gadgets like air fryers, spurred on by viral videos and shoppable content. In the UK, 63% of 18–34-year-olds now own an air fryer.²⁷ In fact last year, FMCG, which includes frozen foods, made up over 20% (21.8%) of total TikTok shop sales. As a result, TikTok is now the 12th largest retailer in food and drink online.²⁸

4



Waste-Conscious Consumers:

Environmental concerns and rising living costs are driving demand for less wasteful products and practices, from reusable packaging to “ugly” produce. It directly addresses food waste by repurposing cosmetically imperfect fruits and vegetables that would otherwise be discarded. For example, Belviva's 'UGLIES' range of potato products is made from slightly blemished potatoes of all shapes and sizes to appeal to this demand and provide better value. In addition, not only is consumer aversion to waste being driven by environmental concerns, but also by the desire to save costs amidst increasing living expenses – in the UK almost six in ten (59%) say they consume frozen food as it reduces food waste.²⁹

5



Fakeaways:

As consumers look to save time on meal preparation, they are keen to replicate the restaurant-quality or quick-service experience in their homes. Not quite a takeaway but the closest thing the Birds Eye Chicken Shop range, from chicken strips to burgers, is a good example of how consumers are taking to supermarkets in search of takeaway equivalent food options that can be stored and prepared quickly at home.



“



“As consumers juggle busy lives and tighter budgets, increasingly frozen food is offering a new way to balance pressures of the modern world. There are a number of trends that will shape the future of frozen into 2026 and beyond.

Taste will always be the number one driver, but health and nutrition are becoming a more important driver of consumer decision-making about their meals, and the continued rise of changing family structures is demanding tailored food solutions, whether it's snackification or the growing appetite for culinary diversity.

The freezer is uniquely positioned to address these trends, offering delicious, convenient, affordable, and sustainable solutions that cater to the diverse needs and preferences of today's European consumers.”

Steve Challouma, Chief Marketing Officer, Nomad Foods



Conclusion

The Frozen in Focus report paints a compelling picture of a frozen food industry undergoing a significant transformation. No longer relegated to a last-resort option, frozen food is emerging as a key player in addressing contemporary consumer needs and global challenges.

This first ever report from Nomad Foods highlights a growing recognition of frozen food's nutritional value, its crucial role in reducing food waste, and its valuable convenience in today's time-constrained lifestyles.

While misconceptions persist, particularly among younger demographics, the new data reveals a shift in perception, with consumers increasingly embracing frozen options as a guilt-free, nutritious, high quality and sustainable choice.

Great, tasty meals should be healthy, convenient and accessible. To help consumers, we need the wider industry

to join us in this mission. That means more transparency in terms of the information provided to consumers, that will enable them to understand more about the food they eat and how it can contribute to higher quality mealtimes.

That means clear, consistent nutrition labelling backed by globally recognised indicators and wider public reporting of healthy versus unhealthy sales. Delivering consistent, clear and comparable information and strong advertising restrictions for foods high in fat, sugar and salt will also support millions of families to build enjoyable plates of food that will provide them with the nutrients they need.

Nomad Foods is committed to driving this evolution, leveraging innovation and technology to unlock the goodness of frozen food and empower consumers to reclaim time, stretch budgets, optimise health, and reduce their environmental impact.

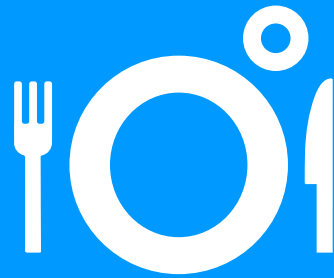


Methodology:

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 7512 adults. Fieldwork was undertaken between 25th April - 2nd May 2025. The survey was carried out online. The figures have been weighted and are representative of all adults in the UK, Germany, France, Italy and Sweden (aged 18+).

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