

Global Frozen Potato Market: Analysis By Product Type (French Fries, Hash Brown, Mashed, Shaped, Topped/Stuffed, Battered/Cooked, and Others), By End-User (Commercial and Residential), By Distribution Channel (B2B Distribution and B2C Distribution), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global frozen potato market was valued at US\$67.27 billion in 2023. The market value is expected to reach US\$89.51 billion by 2029. Frozen potatoes are a versatile and convenient food product made from fresh potatoes that are processed, partially cooked, and then frozen to extend their shelf life. The freezing process preserves the nutritional content and quality of the potatoes while allowing for easy storage and quick preparation.

The global frozen potato market is poised for robust growth, driven by the ongoing expansion of the foodservice industry, including restaurants, cafes, and catering services. The trend towards westernization of diets in many developing countries is also expected to support market growth, as potatoes are a staple in many western dishes. Furthermore, increased investments in marketing and promotional activities by major players in the industry are likely to enhance product visibility and consumer engagement, thereby driving sales. Additionally, the rise of e-commerce and online grocery shopping is making it easier for consumers to purchase frozen potato products, further boosting market growth. The market is expected to grow at a CAGR of approx. 5% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Product Type: The report provides the bifurcation of the market into seven segments based on the product type: French Fries, Hash Brown, Mashed, Shaped, Topped/Stuffed, Battered/Cooked, and Others. The French fries segment held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. The global expansion of fast-food chains like McDonald's, Burger King, and KFC has significantly contributed to the popularity of French fries. These chains rely heavily on frozen French fries for consistency in taste and quality. Moreover, the convenience factor plays a crucial role; frozen French fries can be easily and quickly prepared at home, catering to the fast-paced lifestyles of modern consumers. Additionally, the development of healthier versions, such as oven-baked or air-fried French fries, has attracted health-conscious consumers. The rise of online food delivery services has also boosted demand, as French fries remain a favorite side dish for many delivery orders.

By End-User: The report further provides the segmentation based on the following end-users: Commercial and Residential. The commercial segment held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period. The demand for frozen potatoes among commercial end-users, such as restaurants, fast-food chains, and catering services, has been increasing significantly. Moreover, frozen potatoes require less preparation time compared to fresh potatoes, allowing commercial kitchens to streamline their operations and reduce labor costs. This efficiency is especially important for fast-food chains and high-volume restaurants, where speed and consistency are key to service delivery. Another driving factor is the versatility of frozen potato products, which can be used in a variety of dishes and cuisines. This versatility makes them a valuable ingredient for catering services and diverse restaurant menus.

By Distribution Channel: The report provides the glimpse of the frozen potato market based on the following distribution channel: B2B and B2C. B2B distribution channel held the highest share in the market, whereas B2C distribution channel is expected to be the fastest-growing segment in the forecasted period. B2B (business-to-business) distribution channel for frozen potatoes have seen significant growth due to the increasing demands of commercial end-users such as restaurants, fast-food chains, catering services, and institutional kitchens. One of the primary reasons is the need for bulk purchasing and consistent supply. Businesses like McDonald's, KFC, and local fast-food outlets require large quantities of frozen potatoes to meet their daily operational needs, and B2B distributors can provide the volume and reliability they need. On the other hand, B2C (business-to-consumer) distribution channels for frozen potatoes have

also seen significant growth, driven by changing consumer lifestyles and advancements in retail and e-commerce. The convenience of purchasing frozen potatoes through supermarkets, hypermarkets, and online grocery platforms is a major factor. The rise of e-commerce platforms like Amazon Fresh, Walmart, and local grocery delivery services has made it even more convenient for consumers to access these products.

By Region: The report provides insight into the frozen potato market based on the regions: North America, Europe, Asia Pacific, and Rest of the World. North America held the major share of the market. The US is the prominent market for frozen potatoes due to the rising consumption of convenience food products and surging demand from the working population due to busy lifestyles. Moreover, increasing demand for frozen potatoes from the young age population due to the rising trend of snacking is propelling the market growth in the US. Germany stands out in the European frozen potato market due to its robust food industry and high consumer demand for convenience foods. The country has a significant presence of both international and domestic QSR chains, which heavily rely on frozen potato products. For example, McCain Foods, a global leader in frozen potato products, has a strong market presence in Germany, supplying to numerous fast-food outlets and retail chains. The increasing number of fast-food restaurants and snack bars in Germany has significantly driven the demand for frozen potatoes, particularly French fries and potato snacks.

India is one of the key player in the Asia Pacific frozen potato market, driven by its large and youthful population, rapid urbanization, and increasing disposable incomes. The fast-food industry in India has been growing at a rapid pace, with global chains like McDonald's, Domino's, and Burger King expanding their operations across the country. These chains rely heavily on frozen potato products for their menus, leading to a significant rise in demand. Furthermore, local brands and street food vendors are also incorporating frozen potatoes into their offerings, catering to the changing tastes and preferences of Indian consumers. The Indian government's focus on improving the cold chain infrastructure is also facilitating the growth of the frozen potato market.

Market Dynamics:

Growth Drivers: The global frozen potato market has been growing over the past few years, due to factors such as expansion of quick-service restaurants (QSRs), rising purchasing power, increasing female working population, expansion of e-commerce, growing preference for ready-to-eat (RTE) snacks, aggressive marketing strategies and promotional campaigns, efficient supply chain and distribution networks, and many other factors. As more women join the workforce, the demand for convenient, time-

saving meal solutions has increased. With busy schedules and less time for meal preparation, working women are increasingly turning to frozen potato products, such as French fries, tater tots, and potato wedges, which require minimal preparation and cooking time. This trend is particularly evident in dual-income households where both partners seek quick and easy meal options to balance work and home responsibilities.

Challenges: However, the market growth would be negatively impacted by various challenges such as competition from fresh alternatives, regulatory and compliance issues, etc. Fresh potatoes are perceived by many consumers as having superior taste, texture, and nutritional value compared to their frozen counterparts. This perception is driven by the belief that fresh produce is less processed and contains fewer additives or preservatives. Health-conscious consumers often prefer fresh potatoes due to concerns about sodium content and the overall healthfulness of frozen products.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing health and wellness trend, rising sustainability and eco-friendly practices, rising popularity of plant-based and vegan diets, innovative product offerings, advancement in the cold chain infrastructure, etc. Frozen potato providers have introduced a range of innovative product offerings to cater to diverse consumer preferences and drive growth in the market. One notable innovation is the introduction of flavored and seasoned varieties of frozen potatoes, including options like garlic parmesan fries, spicy wedges, and herb-infused hash browns. These flavorful alternatives appeal to consumers seeking restaurant-quality taste and variety in their frozen food choices. Additionally, there has been a rise in healthier options such as low-fat or baked versions of traditional fried products, responding to the health-conscious consumer trend. Organic and non-GMO certified frozen potato products are also gaining traction among environmentally and health-conscious consumers who prioritize natural ingredients and sustainable farming practices.

Impact Analysis of COVID-19 and Way Forward:

While the COVID-19 pandemic posed significant challenges to the global frozen potato market in 2020, it also accelerated trends that favored the growth of the market. The year 2021 saw a recovery driven by the reopening of the foodservice sector, sustained consumer demand for convenient food options, and continued growth in online grocery shopping. The post-COVID landscape is characterized by sustained demand, product innovation, improved supply chain logistics, and a heightened focus on food safety. These changes have not only helped the market recover from the pandemic's disruptions but have also set the stage for future growth and resilience.

Competitive Landscape:

The global frozen potato market is characterized by intense competition among key players who are striving to expand their market share through product innovation, strategic partnerships, and geographic expansion. The key players in the global frozen potato market are:

Royal Cosun (Aviko)
The Kraft Heinz Company (Ore-Ida)
Greenyard NV
Himalaya Food International Ltd.
McCain Foods Limited
J.R. Simplot Company
Agrarfrost Holding GmbH & Co. KG
Damaco Group
Lamb Weston, Inc.
Farm Frites
Agristo NV
Bart's Potato Company

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