

2022



STRENGTH IN NUMBERS

NATIONAL FROZEN & REFRIGERATED FOODS ASSOCIATION

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NFRA MISSION

The Mission of the National Frozen & Refrigerated Foods Association (NFRA) is to promote the sales and consumption of frozen and refrigerated foods through: Education, Training, Research, Sales Planning and Providing a Forum for Industry Dialogue.

MESSAGE FROM THE PRESIDENT & CEO

The numbers speak volumes, and 2022 was a record-breaking year for NFRA in membership recruitment, convention attendance, and our PR campaign outreach. We gained more new members than ever before. The convention had the largest number of attendees in history. And our consumer PR campaigns continued to grow, generating over 2.5 billion impressions on behalf of the industry.

NFRA is on firm financial ground with investment income in reserve that we are using to find new ways to promote and market our industry to consumers. In addition, a robust member recruitment and retention strategy has created significant membership growth and success in attracting emerging companies.

83 New Members
1,400+ Convention Attendees
2.5B+ PR Campaign Impressions

The Executive Conference in Tempe included many industry experts that were first-time presenters to the event and provided new professional development opportunities. The NFRA Convention in Orlando was a resounding success. The number of attendees and retailer meeting rooms created exceptional networking and business opportunities for everyone.

Annual promotions for March Frozen Food Month and June Dairy Month brought growth for many categories and brands. The media partnership for our national co-op program transitioned to a mobile solution bringing participating brands' messaging closer to the point of purchase. The Ice Cream & Novelties promotion engaged consumers online with fun, interactive content and in-store with creative displays.

Our consumer PR campaigns, **Real Food...Frozen** and **Dairy...and Beyond**, communicated daily with audiences through our Easy Home Meals website and social channels promoting the categories and raising awareness. A redesign of the Easy Home Meals website, the successful launch of TikTok, and the creation of a Retail Dietitian Engagement Panel were among our new initiatives.

Looking ahead, NFRA will unveil new industry research that looks at the post-covid consumer and how our industry can continue to leverage at-home eating occasions. We will also prepare for the full roll out of our first joint frozen and refrigerated promotion, ReDiscover Dairy and Frozen, in January 2024. And this year started the transition in NFRA's leadership as I retire at the end of 2023 and Tricia Greyshock takes over as President & CEO.

I want to thank the Executive Committee and Board of Directors who provided their time and resources in support of NFRA and the advancement of our industry. A special thank you to Kevin Schwab, PICTSWEET, who went above and beyond by agreeing to serve as NFRA Chairman for a second term. With the outstanding leadership of our Board, I'm excited for what lies ahead in 2023.

Sincerely,



Jeff Rumachik
President & CEO



Jeff Rumachik
NFRA President & CEO



Kevin Schwab
2022 & 2023
NFRA Chairman
THE PICTSWEET
COMPANY

STRENGTH IN NUMBERS

ASSOCIATION HIGHLIGHTS



SHARING OUR MESSAGING WITH CONSUMERS



Number

1

Association Representing the Interests of the Frozen and Refrigerated Foods industry

380

Member Companies Strong

NFRA is uniquely positioned as an all-industry trade association with members from every segment of the industry

6

Membership Categories

Manufacturers

Retailers/Wholesalers

Sales Agents

Logistics Providers

Distributors

Suppliers

4
NATIONAL ANNUAL PROMOTIONS



2
YEAR-ROUND CONSUMER PR CAMPAIGNS

Real Food. *frozen.*
Dairy...and Beyond

1
STRONG CONSUMER BRAND



4 WEBSITES

INDUSTRY

NFRAweb.org

NFRAConvention.org

NFRAExecutiveConference.org

CONSUMER

EasyHomeMeals.com

4 NEWSLETTERS

INDUSTRY

Industry Insider

New Products Newsletter

CONSUMER

Easy Home Meals

New Products Newsletter



2 National Annual Meetings

TO SUM IT UP

NFRA provides members with resources and services to enhance their personal and professional development, as well as networking and business opportunities to grow their companies, and build long-lasting business relationships.

STRENGTHENING CONNECTIONS



The **2022 NFRA Executive Conference** in Tempe, AZ, featured an outstanding agenda of expert speakers, as well as fun networking events including the Annual Penguin Open Golf Tournament. The annual conference brings top frozen and refrigerated food decision-makers together in a relaxed setting to discuss the most recent trends, challenges, and opportunities facing the industry, creating a unique event that emphasizes professional development and deeper business relationships.

CONFERENCE HIGHLIGHTS

- Over 130 people attended the April event
- Retailer Keynote Address by Rich Wardwell, President of Superior Grocers
- Outstanding business sessions & speakers included:

- **We're Not Like the Rest** - Jason Smith, Shopper Intelligence
- **Omnichannel, Private Label and Food Innovation** - Tom Bailey, RaboResearch
- **Micro-Fulfillment Centers: Frozen and Refrigeration Options** - Curt Avallone, Takeoff Technologies
- **Looking Ahead: America in Transition** - Colleen McClellan, Datassential
- **Winning the Hearts and Minds of Gen Z** - Mike Poznansky, Neato
- **Beyond Quarantine: Eating at Home in a Post-Pandemic World** - Zack Nippert, CivicScience



NFRA EXECUTIVE CONFERENCE



NFRA  Convention
FROZEN & REFRIGERATED FOODS

The premier industry event focused on one-on-one business meetings

CONVENTION HIGHLIGHTS

- Attendance at the Orlando event exceeded **1,400 industry executives** — the highest participation in recorded history.
- **100 retailer meeting rooms** were reserved and over **3,600 business meetings** held over the three-day event.
- The Taste of Excellence Opening Reception featured **52 brands**, including **13 new member companies**, and 120 of the newest and most innovative products the industry has to offer.
- Speed Meetings accommodated new members and small manufacturers; **25 retailers** and **nearly 100 manufacturers** participated in more than **600 meetings**, an increase of 20% over the previous event.
- **18 participating brands** showcased their products in Café NFRA — a central, informal gathering spot for convention attendees.
- Outstanding breakfast speakers, **Ken Jennings** of Jeopardy! fame and **Alec Ross** leading expert on technology-based innovation, started each day.
- The 2022 Golden Penguin Awards competition winners were recognized, and **8 Top Marketer Awards** were presented.



3 DAYS OF
BUSINESS GROWTH

1,400
ATTENDEES

3,600
CUSTOMER MEETINGS



2023 MEETING DATES

**NFRA Executive
Conference**
April 17-19, 2023
Tempe Mission Palms Resort
Tempe, Arizona

**Annual
NFRA Convention**
October 7-10, 2023
Marriott Marquis & Marina
San Diego, California

NATIONAL PROMOTIONS



BUILD STRONG CATEGORY SALES

For over 35 years, NFRA has been bringing together all segments of the industry to promote the frozen and refrigerated categories to consumers...in-store, online and through traditional, digital, and social media. As Americans continued to cook at home in 2022, NFRA's annual promotions supported consumers' exploration of the aisles and their renewed interest in at-home eating.

March Frozen Food Month 2022

encouraged consumers to check out the new, innovative brands and cuisines in the frozen food aisles. NFRA and 13 leading manufacturer and retailer participating brands reached millions of consumers with incentives to buy frozen foods. The promotion delivered positive messaging about the category and ideas for elevating meal preparation with frozen foods.



June Dairy Month 2022

focused on the modern dairy aisle and how it has evolved over the years. The promotion positioned the dairy aisle as the place to find everyday staples, as well as trendy foods and beverages that meet every lifestyle and dietary need. NFRA and 10 leading manufacturer brands reached millions of consumers with incentives to buy refrigerated foods and delivered positive messages about the category.



Summer Favorites 2022

featured exciting promotional elements and elevated the ice cream experience for shoppers during June and July. Celebrating America's love for these cool treats, 10 leading manufacturer brands joined retailers in creating special events and in-store displays to drive sales. Additional incentives engaged consumers online and in-store to encourage trial and purchase of the many new and innovative ice cream and novelty selections.



NATIONAL PROMOTIONS TACTICS & ACTIVATIONS

- The March and June national program included a media partnership with AdAdapted featuring a mobile-focused approach with Add-to-List and Click-to-Cart functionality.
- Supermarket Gift Card and VIP Coupon Giveaways created consumer interest and engagement during all the promotions.



- The Easy Home Meals consumer website, social media platforms, digital toolkit, point-of-sale materials and more resources actively supported the March, June and Summer Favorites promotions.
- Retailers, manufacturers, sales agents and local associations across the country partnered to create profitable in-store displays and promotions, successful digital and social media campaigns, as well as supported their communities during the promotions.



- Companies of all types and sizes entered their best programs and competed for the coveted Golden Penguin Award.

GOLDEN PENGUIN AWARDS

This prestigious awards competition recognized excellence in merchandising and marketing during NFRA's three annual promotions. A total of **74 Gold and 83 Silver Penguins** were awarded to manufacturers, retailers, wholesalers, sales agents, and local associations. Additionally, the 2022 Top Marketer Award winners were named at the 2022 NFRA Convention.



REDISCOVER DAIRY & FROZEN JOINT PROMOTION



In 2022, NFRA planned for its first-ever joint promotion - *Rediscover Dairy and Frozen*. The promotion taps into the collective power of the categories to capitalize on the eat-at-home trend and sustain the record-setting sales. The year was spent planning for a soft launch in January 2023 on the Easy Home Meals social channels with a full roll-out of the promotion in January 2024.

CONGRATULATIONS TO THE 2022 TOP MARKETERS!

B&G Foods, Inc.
 Babbs Supermarket
 Brookshire Grocery Company
 Bubbies Ice Cream
 Chris' Food Center
 Land O'Lakes
 North Florida Frozen & Refrigerated Foods Association
 Schraad Sales & Marketing

CONSUMER PR CAMPAIGNS

NFRA is successfully reaching and engaging millions of consumers year-round with targeted messaging for both frozen and refrigerated foods. These industry efforts are enhancing consumer outreach around NFRA's annual promotions and driving consistent communication about the categories throughout the year. The goal: to spark new conversations that will change and elevate perceptions about frozen and refrigerated foods.

Real Food. *frozen.*

MESSAGING PLATFORM

Real ingredients. Chef-inspired recipes. Fresh flavors. Wholesome meal ideas. Portions and packaging that don't leave anything to waste. The freezer aisle is pretty cool. It's filled with real food. Frozen. To meet your real life needs.

Dairy... *and Beyond*

MESSAGING PLATFORM

Today's modern dairy aisle has evolved over the years, adapting to new lifestyle changes, food trends and every dietary need. Discover innovative beverages and foods beyond the traditional dairy staples that we count on every day and uncover endless creative possibilities.

2022 Frozen & Refrigerated Campaign: 2.55 billion impressions

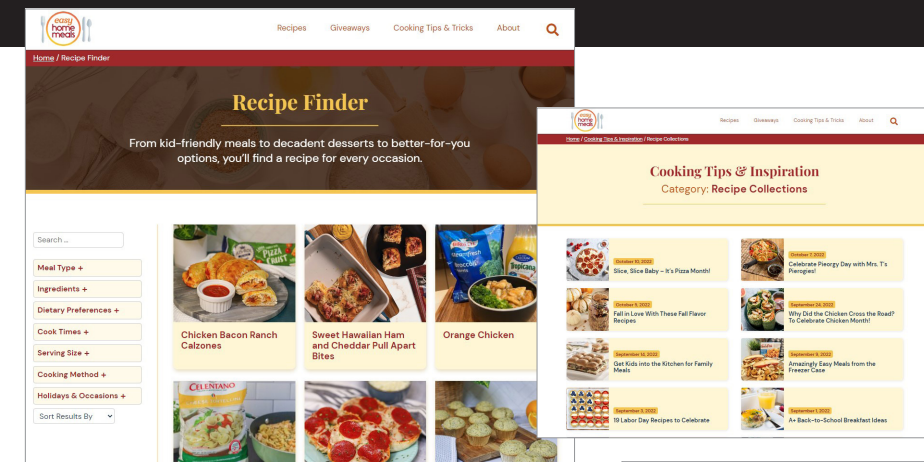
PR CAMPAIGN OBJECTIVES

- Drive consistent, positive communications to consumers
- Generate greater share of voice in traditional and social media
- Increase awareness and consumption of frozen and dairy aisle foods
- Align and engage NFRA members
- Amplify members' brands, products and initiatives

TACTICS FOR TELLING THE STORY OF FROZEN & REFRIGERATED FOODS

- Enlist a diverse community of storytellers and influencers
- Employ robust Easy Home Meals digital and social media strategies
- Create dynamic, engaging content
- Build valuable and productive strategic partnerships
- Develop expansive and effective media outreach opportunities
- Engage NFRA members and leverage member resources

CONSUMER BRAND



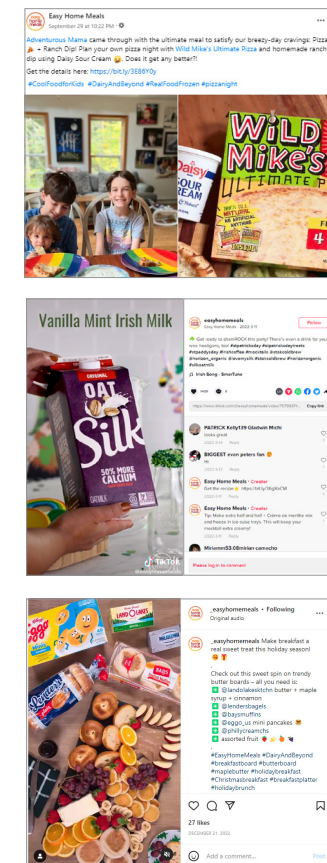
REDESIGNED EASY HOME MEALS WEBSITE

The Easy Home Meals website is central to NFRA's consumer communications and PR campaign efforts. It was redesigned in 2022 to provide a better user experience. The site offers a searchable database of thousands of recipes, as well as helpful information and tips about both frozen and refrigerated foods all while showcasing NFRA member brands. In 2022, the Easy Home Meals website had:

- 341,066 unique users
- 909,786 sessions
- 1,224,998 pageviews

EASY HOME MEALS NEWSLETTER

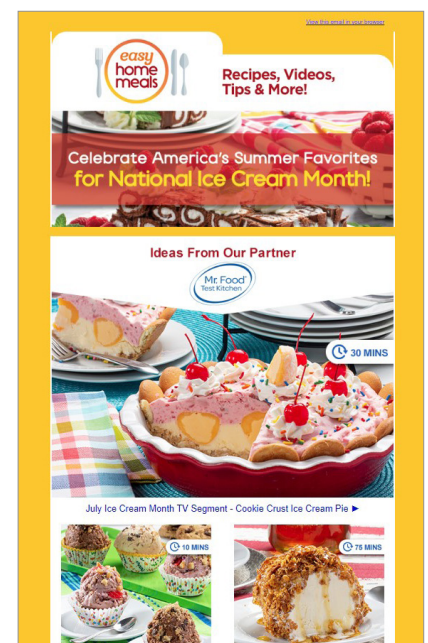
This popular e-newsletter is sent bi-monthly to a growing list of more than 82,000 consumers providing recipes, planning ideas and tips, as well as the opportunity to enter NFRA's consumer contests and sweepstakes. The Easy Home Meals e-newsletter drives consumers to EasyHomeMeals.com and Easy Home Meals social properties.



- f** 447,868 followers
- d** 40,586 followers
- o** 8,839 followers
- p** 7,133 followers
- t** 3,436 followers
- YouTube** 1,750 subscribers

SOCIAL MEDIA PLATFORMS

The Easy Home Meals social media platforms are key to PR efforts and communicating the frozen and refrigerated foods message to large audiences. In 2022, NFRA successfully launched Easy Home Meals on TikTok quickly creating a highly engaged fan base. All Easy Home Meals channels promoted influencer content, recipes, meal assembly ideas, sponsor products, hot trends, annual promotions and more. Social media garnered **31.5M impressions and 1.04M social engagements.**



STRENGTHENING CONSUMER REACH & ENGAGEMENT

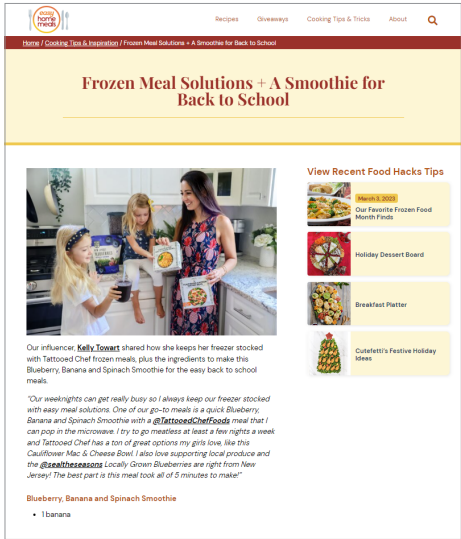


June Dairy Month VMT

COOL FOOD PANEL OF INFLUENCERS

NFRA's Cool Food Panel of home cooks, trained chefs, foodie experts and dietitians was central to successful campaign efforts during 2022. The diverse group of storytellers focused on developing creative food content and sharing recipes and meal assembly ideas. They shared positive frozen and refrigerated food messages with their audiences and featured over 40

NFRA member brands. The Cool Food Panel garnered **impressions of more than 29.3M.**



MEDIA OUTREACH

Paid media outreach grew in 2022 with timely PR Newswire releases on key events, promotions, holidays and relevant content amplifying positive conversations around frozen and refrigerated foods.

Highlights included three multimedia distributions for the March and June promotions, as well as tips for the holidays. **Media efforts garnered more than 1.42B impressions.**

2022 PR CAMPAIGN HIGHLIGHTS

VIRTUAL MEDIA TOURS

Virtual media tours for March Frozen Food Month and June Dairy Month with Chef Jamie Gwen spread our message to TV, radio and online news outlets across the country. The March VMT featured meal assembly ideas to elevate the culinary experience and drive more shoppers to the frozen food aisles. The June VMT showcased the appeal of the dairy aisle for every lifestyle and dietary need. The media tours secured a total of **3,134 broadcast airings and more than 58.8M impressions.**



STRATEGIC PARTNERSHIPS

NFRA continued to work with long-time partner Mr. Food Test Kitchen to create unique, proprietary recipes and videos for all Easy Home Meals social platforms. In addition, four TV segments reached viewers across the country. Activations generated **76M impressions.**



Twitter parties with @ResourcefulMom supporting the March and June promotions, as well as holiday messaging, engaged moms, bloggers, RDs and member brands in real-time conversation about frozen and refrigerated foods. Twitter parties garnered a total of **283.3M impressions and 15.6K tweets.**

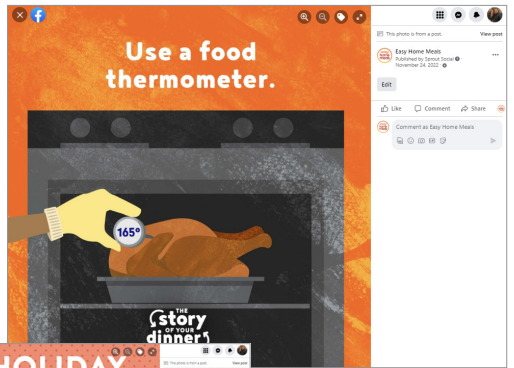


EDUCATIONAL INITIATIVE

NFRA partnered with curriculum specialists, Young Minds Inspired, to create educational materials for elementary and middle school students focused on building life skills including understanding food costs, avoiding food waste, and the benefits of meal planning. Materials were also translated into Spanish. Over **87,300 teachers** received the program with **61K visits to the program microsite and 40.5K downloads** of the curriculum.

FOOD WASTE & FOOD SAFETY INITIATIVES

NFRA made food waste and food safety information and discussions a priority. Joining with the Partnership for Food Safety Education, informative and engaging content was created and shared across all NFRA's social media channels.



RETAIL DIETITIAN PANEL

During 2022, NFRA established a Retail Dietitian Engagement Panel that met quarterly to review consumer content and make recommendations, as well as encourage RDs to use the materials in their outreach efforts. Digital toolkits full of valuable resources were provided to help RDs promote frozen and refrigerated foods to shoppers in-store.

NFRA COMMUNICATIONS

STAYING IN TOUCH AND INFORMED

NFRAWEB.ORG

NFRA's industry website is the hub for all Association news, information, and resources. Access content about membership, annual promotions, consumer PR campaigns, events, and promotional resources. A Members-Only portal houses industry research, resources, archived newsletters, and a complete member directory.



INDUSTRY INSIDER

This monthly e-newsletter keeps members up to date on the latest Association news, events, and promotions. It includes new member profiles and news from member companies, as well as highlights from the Easy Home Meals consumer channels.

NEW PRODUCTS NEWSLETTER

Brands sponsoring NFRA's PR campaigns can share new product developments and introductions in the New Products Newsletter emailed quarterly to all members, as well as NFRA's consumer audiences.



VALUE OF MEMBERSHIP

NFRA's diverse all-industry membership puts members in touch with over 2,800 contacts from top companies in the industry, 365 days a year, providing endless opportunities for business growth.



TOOLS FOR SUCCESS

- Membership in NFRA affords 24/7 access to the online Member Database of over **380+ member companies** and **2,800+ contacts**.
- Available free** to members, proprietary research dives into recent data on industry trends, consumer values, market dynamics, future innovations, and more.
- The members-only NFRA Data Dashboard, in cooperation with IRI, is an all-in-one portal featuring the latest frozen and refrigerated market data. Quarterly and weekly sales stats for **47 categories and 155 subcategories** is refreshed regularly.

NFRA RESOURCES

INDUSTRY CONNECTIONS

5 Committees/Forums to Expand Your Network

FROZEN & REFRIGERATED PROMOTIONS COMMITTEE

Helps develop and direct frozen and refrigerated promotional activities of the association and serves as a sounding board for exploring new member services.

ICE CREAM & NOVELTIES COMMITTEE

Supports NFRA's ongoing ice cream and novelties promotion. Helps develop new outreach ideas and resources such as POS materials, as well as define funding strategies.

PRIVATE BRANDS FORUM

Network and discuss key trends and issues facing the industry. Best practices and peer-to-peer learning opportunities give members insight on how to grow private brand sales.

SMALL BUSINESS MANUFACTURER'S FORUM

Discuss key issues unique to frozen and refrigerated small businesses. Offers members the opportunity to share best practices and case studies to grow their business.

SUPPLY CHAIN FORUM

Discuss key frozen and refrigerated supply chain issues and challenges. Information and ideas on supply chain optimization and shared best practices help members improve their business.



83

NEW COMPANIES JOINED THE ASSOCIATION IN 2022. THAT'S A 60% INCREASE YOY

FINANCIAL STATEMENT

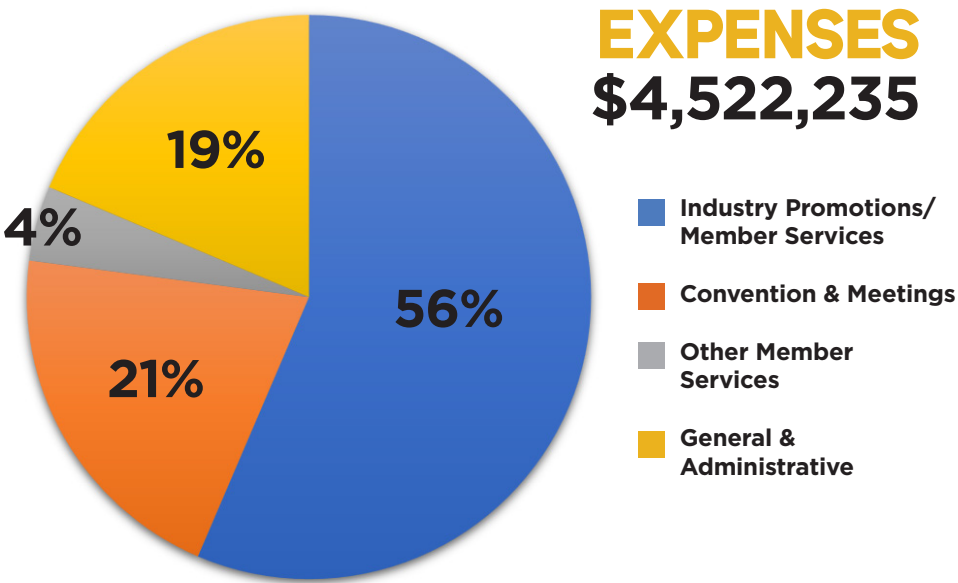
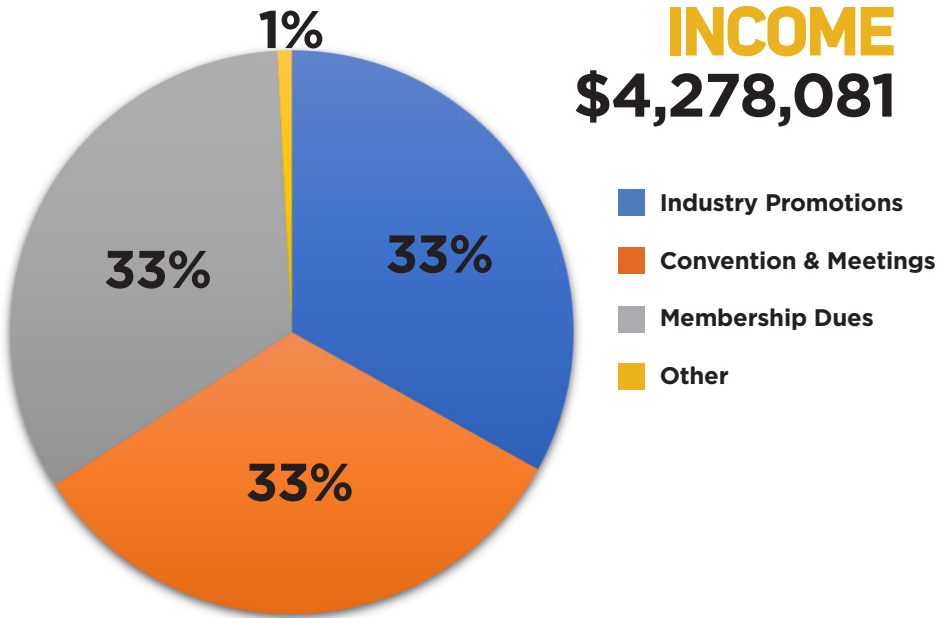
Industry Promotions/Member Services include those expenses related to the Frozen & Refrigerated PR campaigns, the March, June, and Ice Cream national promotions, point of sale material, educational programs, and research.

Convention & Meetings include those expenses related to the annual Convention, the Executive Conference, and any other Board of Director and committee meetings that take place during the year.

General & Administrative Services include those expenses related to the day-to-day operations of the Association. These include items such as a portion of salaries and travel, office and technology expenses, facility maintenance, office operations, and professional services.

Other Member Services include expenses related to retaining members, soliciting prospective members and communication that is sent out to members including the NFRA Industry Insider and Annual Report.

For the twelve months ending December 31, 2022, the Association had a net loss of \$2,611,044. This includes Endowment & Investment loss of \$2,366,890, which is not reflected in the charts.



INCOME STATEMENT
AT-A-GLANCE

For the Twelve
Months Ending
December 31,
2022

NFRA EXECUTIVE COMMITTEE



Kevin Schwab
Chairman
THE PICTSWEET
COMPANY



Neil Ritchey
Chairman Elect
InnovAsian Cuisine
Enterprises



Tye Anthony
Vice Chairman- Frozen
Associated
Wholesale Grocers



Joey Bates
Vice Chairman-
Refrigerated
Harris Teeter, LLC



Tracy Aquila
Secretary
Southeastern
Grocers



Mark Tarzwell
Treasurer
Ateeco Inc./
Mrs. T's Pierogies



Joe D'Albarto
Immediate Past Chairman
Acosta Sales &
Marketing Co.



Dave Jones
Past Chairman
The Dave Jones
Network LLC



Matt O'Hare
Convention
Chairman
JOH



Bill Kitchens
NFRA General Counsel
Arnall Golden
Gregory LLP



Jennifer Shelfer
NFRA General Counsel
Arnall Golden
Gregory LLP

NFRA BOARD OF DIRECTORS

Tony Battaglia
Lactalis American Group

Todd Bostian
Lowes Foods LLC

Bob Brown
Jewel-Osco

Jim Buchta
CROSSMARK

Tony Caloroso
Schraad Sales & Marketing

Bryan Chartrand
Acosta Sales & Marketing
Co.

Angie Christos
Tyson Foods, Inc.

Stacy Cobb
Kraft Heinz Company

Lauren Corprew
General Mills

Shawn Darmody
Target Corporation

Derek DeMuth
Ajinomoto Foods North
America, Inc.

Sue Durfee
Tops Markets, LLC

Tom Finn
Rosina Food Products, Inc.

Kevin Herd
Danone North America

Risa Jenkins
C & S Wholesale Grocers, Inc.

Amanda Klane
Yasso, Inc.

Bill Kynast
Chobani Global Holdings, Inc.

Cathy Magistrelli
Wakefern Food Corporation

Joe Mueller
Kellogg Company

David Panter
Associated Food Stores, Inc.

Tom Robaczewski
Acelerada LLC
(Bays, Lender's)

Parag Shah
The Giant Company

Shannon Sherrard
Graeter's Ice Cream

Kellie Shetlar
Conagra Brands

Ron Slominski
Schwan's Consumer Brands,
Inc.

Logan Underwood
Land O'Lakes Foods, Inc.

Teresa Whitney
Albertsons National

Clinton Wilson
Sargento Foods Inc

ADVISORY DIRECTORS

Richard Akins
Harris Teeter, LLC

Tiffany Carreker
White Castle

Rob Cohen
Bozzuto's, Inc.

Heather Cooper
Oatly Inc.

Eric Eichman
Tillamook

Patrick Geiger
Mars Ice Cream

Shannon Gilreath
Rich's Consumer Brands

Rick Glackin
SellEthics Marketing Group
Inc.

Dan Harder
OSMG (On-Shelf Marketing
Group)

Tim Holzman
Palermo Villa, Inc.

Kris Luckhaupt
H.P. Hood, LLC

Kevin Morgan
Califia Farms LLC

Ross Purdy
K-VA-T Food Stores, Inc.

David Rosen
Coca-Cola North America

Angela Rosenquist
InnovAsian Cuisine Enterprises

Marty Steinmetz
United States Cold Storage,
Inc.

Kristen Thompson
B&G Foods Inc.

Chris Wilkerson
THE PICTSWEET COMPANY

COUNCIL MEMBERS

Scott Klane
Daisy Brand

Dan Maloney
Woodland Partners, Inc.

Edward McDonald
Green Grass Foods DBA
nutpods

Jessica Moore
Hussmann Corporation

James Perillo
RDD Associates, LLC

Trenton Potts
Campoverde

Ted Yeomans
Advantage Solutions

NFRA STAFF



Jeff Rumachik
President & CEO



Tricia Greyshock
Executive Vice
President & COO



Julie Henderson
Vice President of
Communications



Jessica Scott
Vice President of
Finance



Mike Barth
Vice President of
Association Services



Kate Landis
Director of
Membership



Natalie Limm
Senior Manager of
Member Communications



Sarah Thompson
Manager of Events &
Association Services



Tracy Troutman
Office Manager/
Communications Assistant



STRENGTH IN NUMBERS

Join the Conversation!

NFRA is actively communicating with consumers every day on our Easy Home Meals social platforms, and we invite you to join the conversation.

- Follow Easy Home Meals on Facebook, Twitter, Pinterest, Instagram, YouTube & TikTok
- Offer internal experts as content contributors to our Easy Home Meals website
- Share your brand's recipes and photos on our website and social media properties
- Participate in our Twitter parties throughout the year

#REALFOODFROZEN

#DAIRYANDBEYOND



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