



MEAL SOLUTIONS



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From Drab to Destination

U.S. Frozen sales — up **45%**
vs. 2019

U.S. Ref sales — up **15.4%** vs.
2019



THE PROBLEM

What's for Dinner?

50% Decide dinner the same day

40% Of shoppers want more meal planning help

44% Eating more family meals at home



Opportunity: Bring the Meal-Kit Experience to the Aisle

The Opportunity

Own the meal. Own the trip.

Frozen is a growing, digitally influenced meal destination.

\$87B¹

U.S. frozen retail sales
Over 45% above 2019
52 weeks ending Sept. 2025

83%²

of adults say frozen foods
make meal planning easier

~90%³

of online shoppers bought
frozen food online in the
past six months

ENTRY



INTERMEDIATE



ADVANCED

Illustrative progression of opportunity & investment

1. AFFI/FMI, Power of Frozen in Retail 2026; reported by IndexBox, March 3, 2026.

2. NFRA, 2024 Impact Report, p. 12.

3. AFFI/FMI, Power of Frozen in Retail 2026; reported by FoodBiz, March 5, 2026.

Strategy ladder is illustrative; financial returns are not established by these studies.



ENTRY

Easier to Shop



QR code pointing to a recipe



QR click-through rate



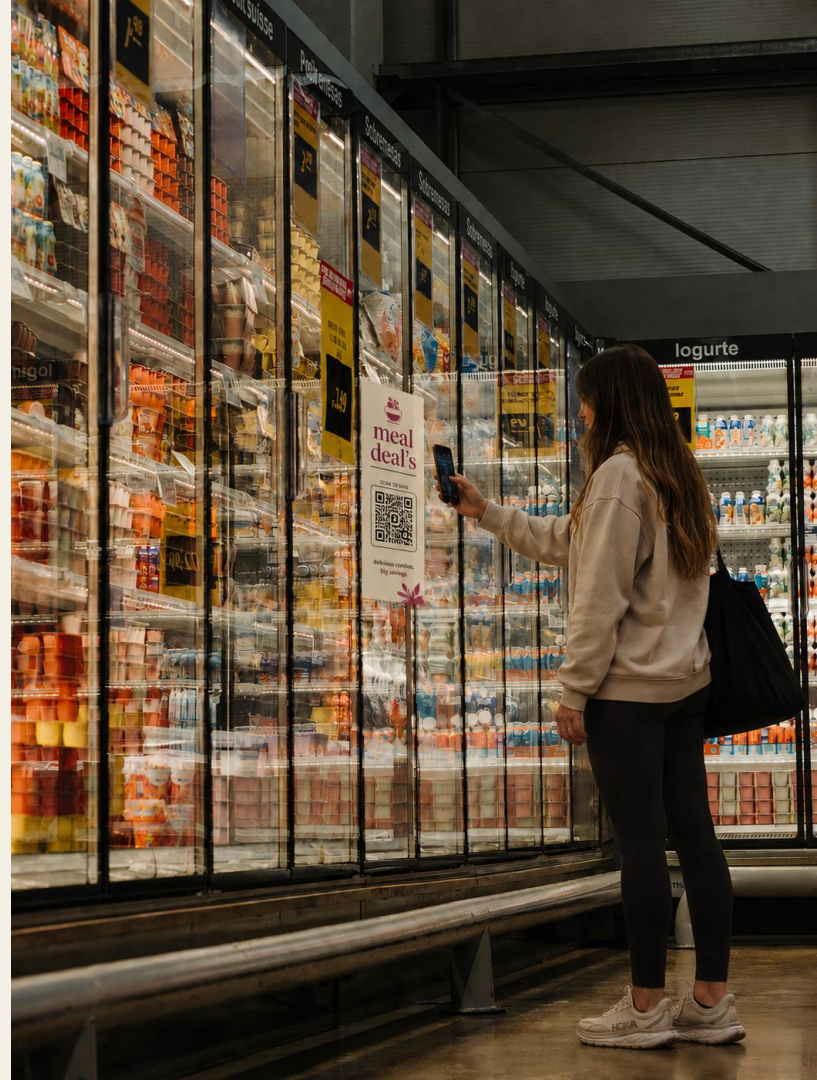
Bigger Baskets, Digital Coupons



Redemption vs. Print

+\$48K–\$80K

potential annual revenue opportunity





Intermediate

Solution-Based Meal Deals

Manufacturer + retailer meal deals

Existing trade funds → shift

In-store + online; 1-click add-to-cart + loyalty discount

Team Pizza Night

Gluten-Free
Breakfast

Mediterranean
Dinner

Tex-Mex
Meal Prep

\$128K-\$192K

Revenue opportunity

Investment-

\$20K-\$80K digital

Illustrative ROI under assumed conditions. Real-world proof: The Fresh Market “Little Big Meal” — \$25, feeds four, grouped for grab-and-go (thefreshmarket.com, 2026).

Advanced

Connected, Personalized Meal Solutions

AI Meal Deals

Dynamic Partnerships

Adaptable Promos

\$160K - \$240K

Revenue opportunity

Investment - **Higher**
\$20K per store



Dinner Deal!

BUY 1
Pat LaFrieda
Beef Hamburgers

AND GET 4 FREE!

ADD ITEMS TO CART

*This promotion is for items purchased in-store. Items must be purchased with this Plus Card and can be a single transaction. Limit 1 of each item must be purchased. See participating locations.



Digital MEAL DEAL

Best Choice Ketchup
34 oz.
Always Save Mustard
6 oz.

Lewis Hot Dog Buns
16 oz. 104 mg.
Sodium

Ball Park Classic Franks
6 oz.



Stock-up for Frozen Food Month!

Buy this

Get this FREE

Must buy 2
Michael Angelo's Family Size Entrée
Frozen, Select Varieties,
25-32 oz. box 7009564

Pepperidge Farm® Family Size Bread®
Frozen, Select Varieties,
15-12 oz. box 7009564



\$5.00




RAO'S

SAVE \$5
WHEN YOU SPEND \$20
on participating Rao's products
in a single transaction. LIMIT 1 OFFER

*Offer is valid on purchases of \$20 or more. Offer is valid on purchases of \$20 or more. Offer is valid on purchases of \$20 or more.

Rao's Pasta Sauce 12 oz. 8.99 ea	Rao's Pizza 18.5-20.5 oz. pkg. 8.99
Rao's Pasta 16 oz. pkg. 3.49	Rao's Family Size Entrées 16-27 oz. pkg. 8.99
Rao's Soups 10 oz. pkg. 5.99	Rao's Entrées 8.8-10.5 oz. pkg. 3.99

BUY ONE
32 oz. Michael Angelo's Entrée **AND**
19.6 oz. Pepperidge Farm Cake
GET ONE
10 oz. Pepperidge Farm Garlic Bread
FREE

VIC SAVINGS

All items must be purchased in the same transaction with your VIC card.



Features

FREE



Angelo's

COCONUT **COCONUT** **FUDGE STRIPE** **FUDGE STRIPE**

SAVINGS

6.99 **4.99** **5.00**



10.99



Branch Deal

BUY 3
GET 1 FREE

16.99 **FREE** **1.99** **2.49**



BUY ONE
32 oz. Michael
Angelo's
Entree **AND**
19.6 oz.
Pepperidge
Farm Cake
GET ONE

10 oz. Pepperidge
Farm Garlic Bread

FREE

All items must be purchased in the
same transaction with your VIC card.

**VIC
SAVINGS**



**Product
Features**

BUY ONE
32 oz. Michael
Angelo's Entree **AND**
19.6 oz. Pepperidge
Farm Cake **OR**
10 oz. Garlic Bread
**GET ONE
FREE**



VIC SAVINGS
BUY
SELECT ITEMS
FOR
6.99
REG.
PRICE
2.30

VIC SAVINGS
BUY
SELECT ITEMS
FOR
4.99
REG.
PRICE
.70

VIC SAVINGS
BUY
SELECT ITEMS
FOR
\$5.00
REG.
PRICE
1.39

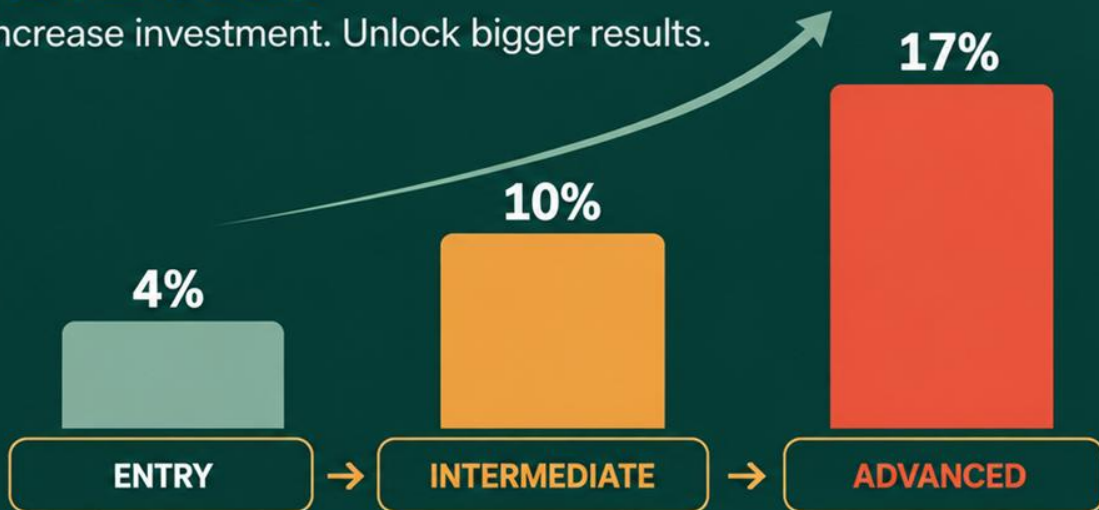


The Solution

Own the meal. Own the trip.

ROI LADDER

Increase investment. Unlock bigger results.



Illustrative basket-lift %, assumed conditions.

Sources: AFFI & FMI, Power of Frozen in Retail, 2025–26; NFRA consumer research, 2025.
ROI ladder is illustrative under assumed conditions.



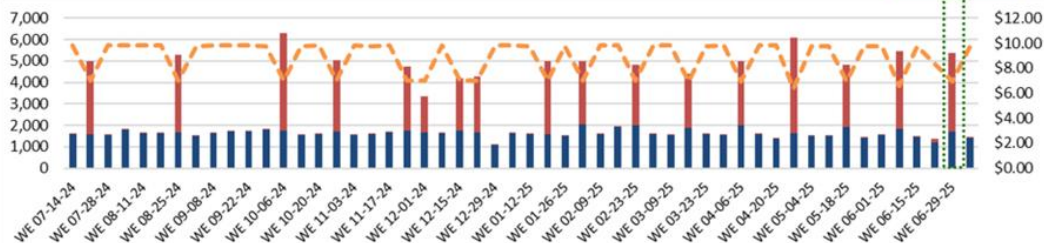
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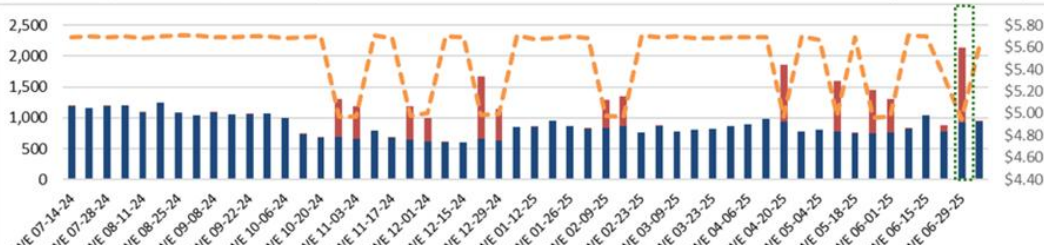
Sources:

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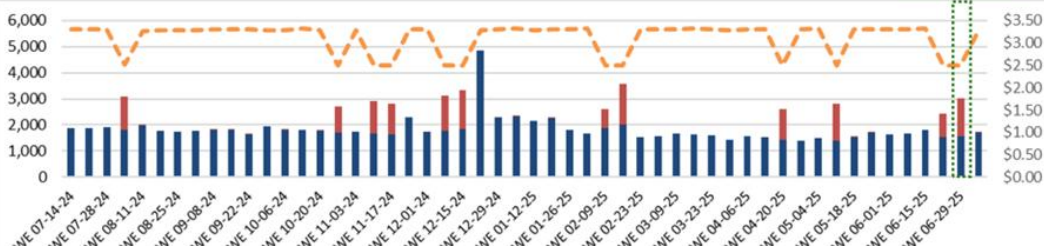
Michael Angelo's Family Size



Pepperidge Farm Layer Cakes



Pepperidge Farm Garlic Loaf 10oz



Overview:

- Top performing unit weeks across participating product groups
- Feature + Powershell + Looma End Cap Content
- Michael Angelo's Family #4 unit selling week (+3,676 units / +216%)
- Pepperidge Farms Layer Cakes #1 unit selling week (+1,205 units / +131%)
- Pepperidge Farms Garlic Bread 10oz #6 unit selling week (+1,448 units / +92%)
- **Recommendations** for future events:
 - Shelf tags calling out "Free Pepperidge Farms Bread"
 - Feature the PF Garlic Texas Toast instead (higher velocities than loaf)
 - Look to promote in colder months such as October, November or March