



Overview of frozen meals

available in Québec in 2018 and 2023

The Observatory conducted a follow-up study of the frozen meal market, five years after its initial 2018 report. A decline in the product offering was observed, with a total of **346 products** listed, accounting for 66% of the market (compared to 386 products in 2018, which represented 70% of the market).

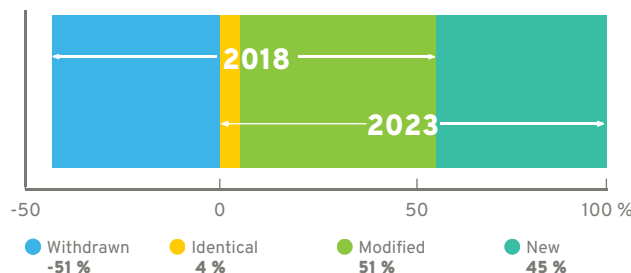
1 Frozen meals listed in 2023

The greatest **variety**¹ was still found among meals containing vegetables, starchy foods (eg., potatoes, pasta), and protein (63% of the supply). These also remained the best-selling items (48% of sales), with an increase of +7 pp² since 2018.

Additionally, poultry meat was still the most prevalent protein source in frozen meals (27% of the supply).

In regard to the **status**³:

- Most of the products were modified between 2018 and 2023 (n=178/346; 51%).
- Modified products accounted for 77% of sales in this category.
- Meals containing vegetables, starchy foods, and protein accounted for the largest share of modified and new products.



New frozen meals in 2023 contained **more energy, fat, fiber, protein, and sodium** than products with another status (identical, modified or withdrawn since 2018).



Frozen meals that were **modified** since 2018 contained **less fiber and protein, as well as more sodium and saturated fat** than before.

¹ Variety: number of different products.

² Percentage points: These represent the difference in market share percentages for the same category between 2018 and 2023.

³ Product status: New, identical, modified or withdrawn since 2018.

2 Evolution of nutritional composition

Frozen meals **offered** in 2023 contained more energy (+9%), fat (+23%), protein (+6%), and sodium (+11%) than in 2018. This may be attributable, in part, to a slight increase in the weight of a package (+7%).

The nutritional composition of **purchased** products (**weighted by sales**) has not changed significantly since 2018. This means that despite changes in the product offerings, consumers purchased frozen meals similar to those from 2018.

3 Front-of-package Nutrition Symbol

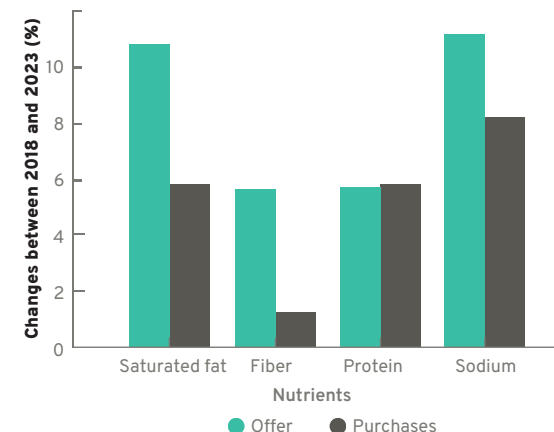
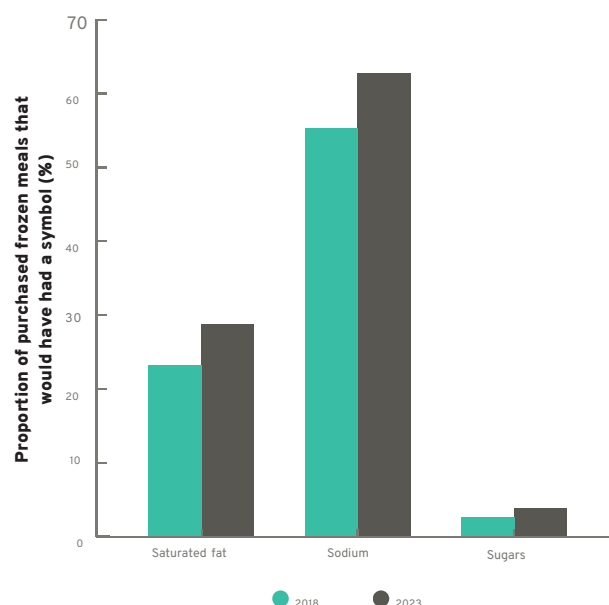
To determine whether a product should bear the symbol indicating a high content in saturated fat, sugars and/or sodium, the 30 % Daily Value (DV)⁴ threshold is used for frozen meals⁵.

Overall, **67%** of frozen meals purchased in 2023 would have had to display the **front-of-package nutrition symbol** for at least one nutrient (+8 pp compared to 2018). More than a quarter of frozen meals would have displayed it for at least two nutrients.

More specifically, **29%** of frozen meals would have had to carry the nutrition label indicating a high **saturated fat** content, and **63%** would have displayed the label indicating a high **sodium** content. This represented an increase of +6 pp and +8 pp, respectively, compared to 2018.



Although no symbol is associated with protein content, **54%** of the meals offered in 2023 met the threshold of 18 g of protein per meal⁵, a **significant increase of +8 pp**.



4 Conclusion

Frozen meals offered in 2023 saw significant increases in their energy, fat, protein, and sodium content. Just like in 2018, **sodium** and **saturated fat** content remain a major concern for this category:

- Nearly 30% of frozen meals would have had the symbol indicating a high saturated fat content and 63% would have had it for a high sodium content.
- Substantial efforts will need to be made to reduce the saturated fat and sodium content of frozen meals in Quebec in the coming years.

⁴ 30% Daily Value Threshold: The threshold determined by Health Canada representing a high quantity of a nutrient for a reference amount of a main dish (≥ 200 g), such as frozen meals.

⁵ The calculation was based on the dietary reference intakes (i.e., 0.8 g per kg of body weight per day). The average weight was estimated at 75 kg. Thus, the daily dietary intake was estimated at 60 g, and the 30% threshold was set at 18 g.

Data from this overview of frozen meals comes from:



Nutritional composition



Consumers purchases

Market coverage

75 % of the offer
66 % of sales

For more information : observatoire.inaf.ulaval.ca/en/

With the contribution of :



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