

# Indonesia Frozen Food Consumption Trends

2024 Jakpat Survey Report

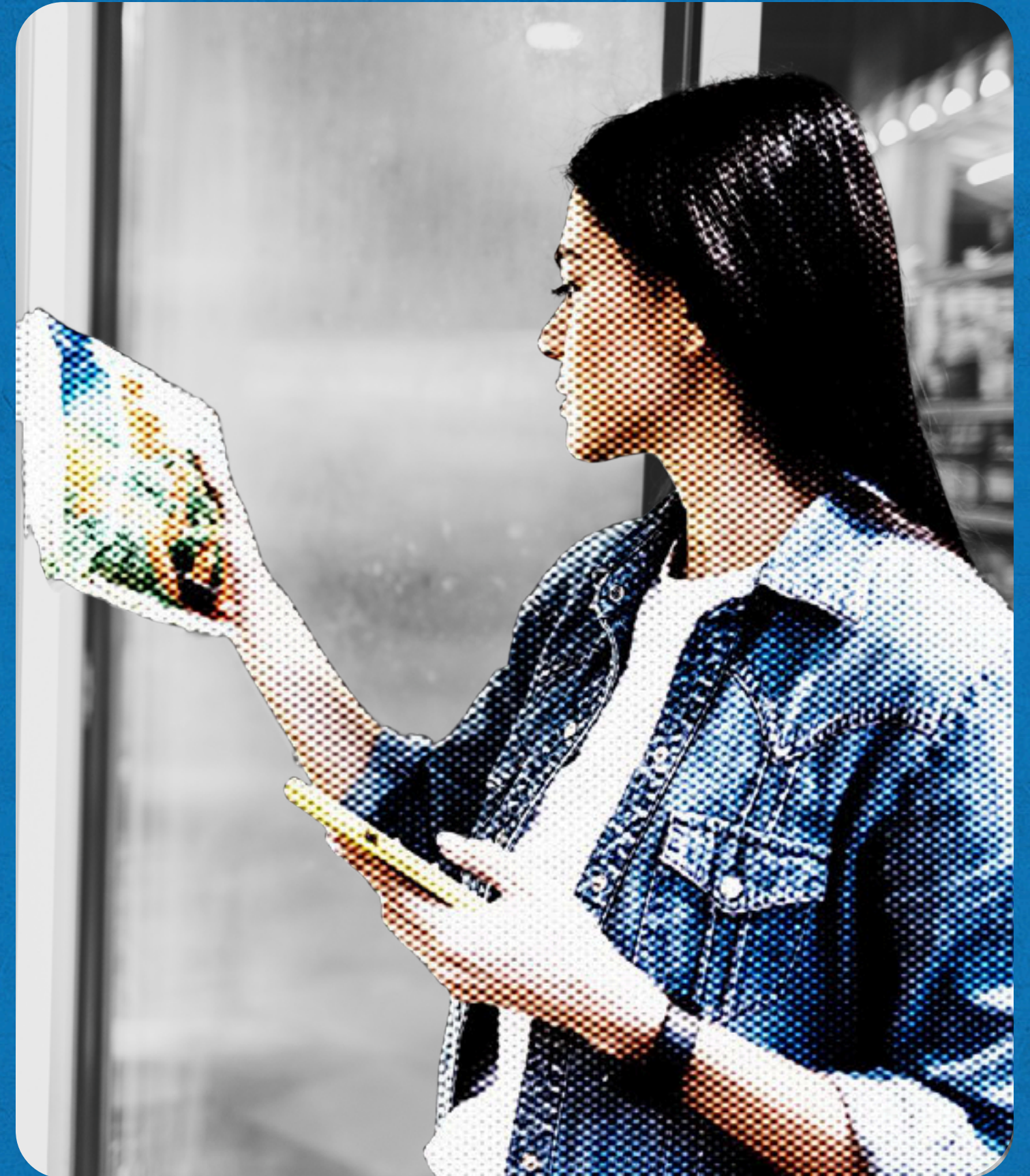




# Forewords

The frozen food market in Indonesia has now reached IDR 200 trillion, with significant growth driven by the busy urban lifestyle<sup>1</sup>. This shift reflects changing consumer preferences that have notably impacted frozen food consumption trends. Involving 1,245 respondents, this report reveals trends in frozen food consumption, including popular frozen food categories, brand awareness, and key purchasing influences across various demographics.

<sup>1</sup><https://ekonomi.bisnis.com/read/20210616/257/1406307/tren-frozen-food-bakal-pacu-pasar-rantai-dingin-hingga-rp200-triliun>





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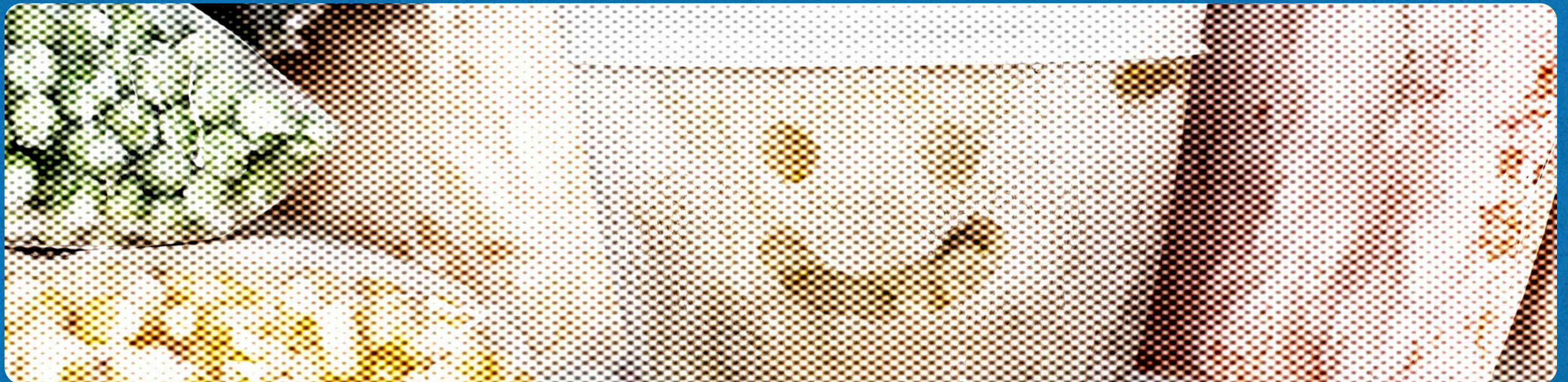
# Research details

## Data collection

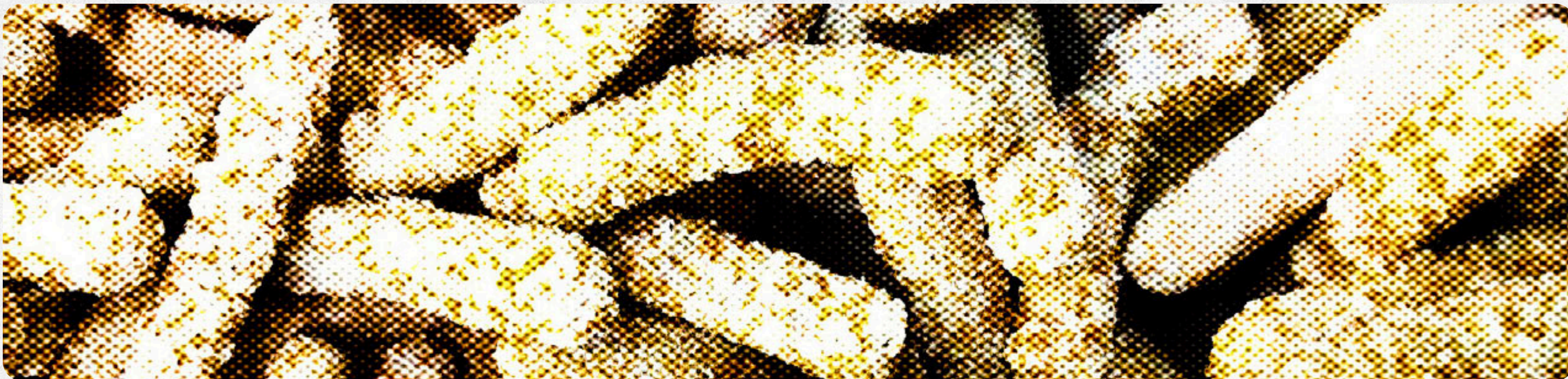
- The survey was distributed to a total of **1245 respondents**
- The data were collected from **7th–8th of November 2024**
- Margin of error **below 5%**
- The questionnaires were distributed via **Jakpat mobile app**
- Proportioned by **Indonesian internet population**

## Research objective

- Exploring the most consumed frozen foods
- Understanding frozen foods brand awareness and usage
- Factors influencing frozen food purchasing decision
- Concern regarding frozen food







## Research highlights



9 out of 10 people consume frozen processed meats.



The primary reason 86% of people consume frozen food is the convenience of preparation.



Nutritional information indicating no preservatives is considered important by 63% of respondents.



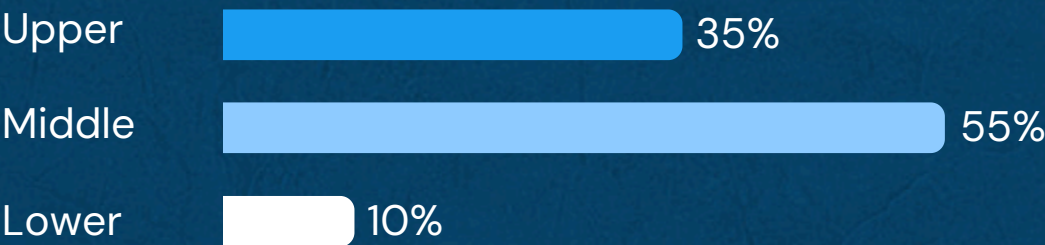
n= 1246 respondents

# Demographic profile

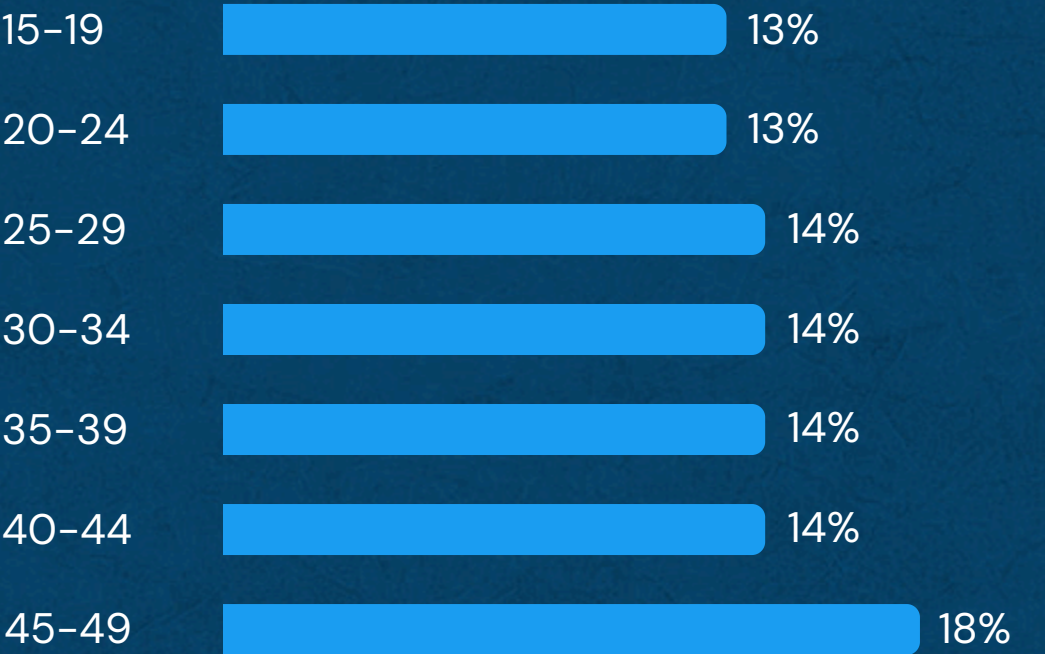
## Gender



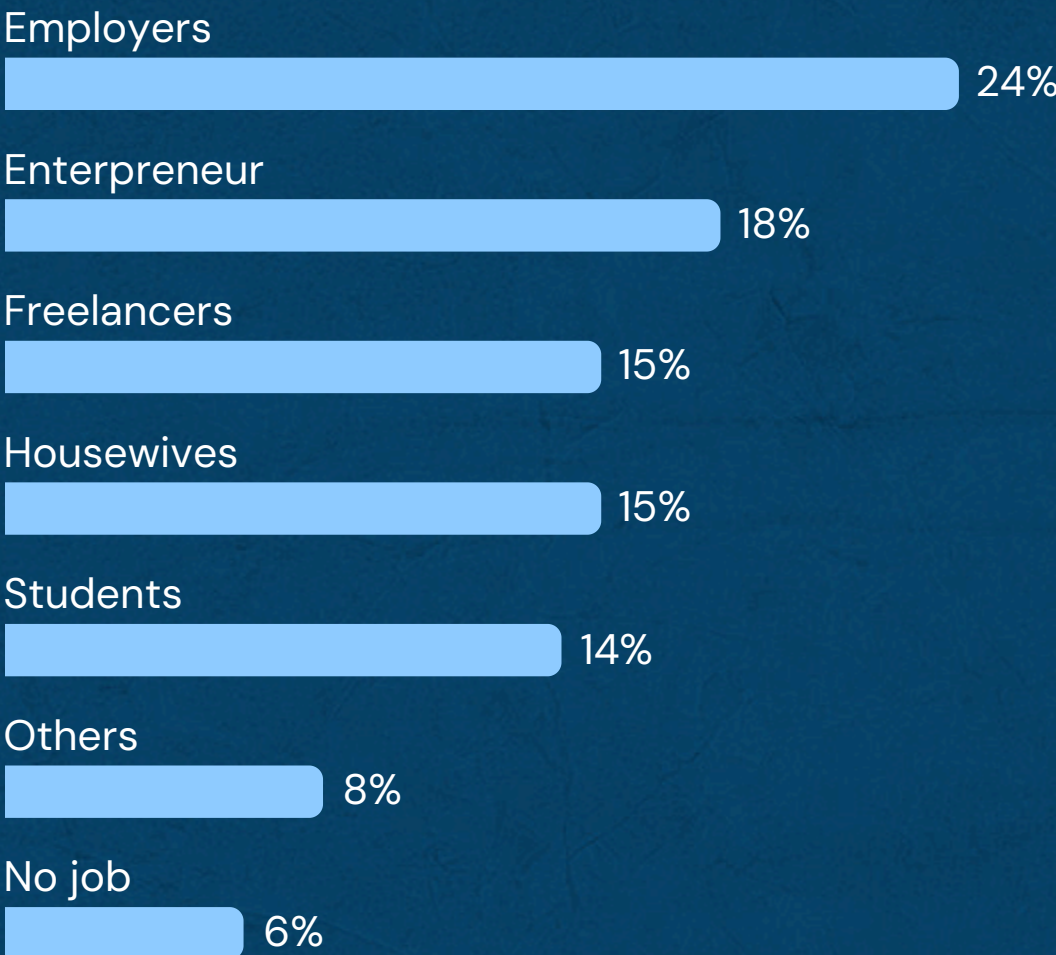
## SES



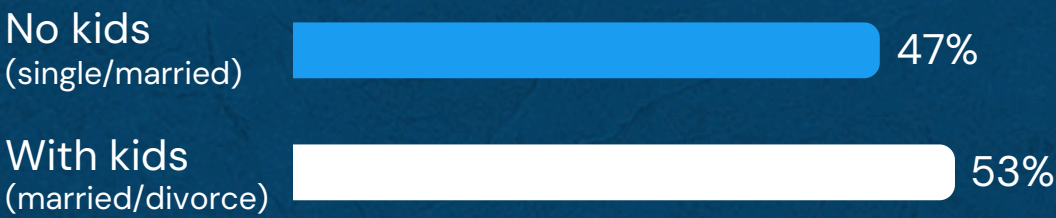
## Age range



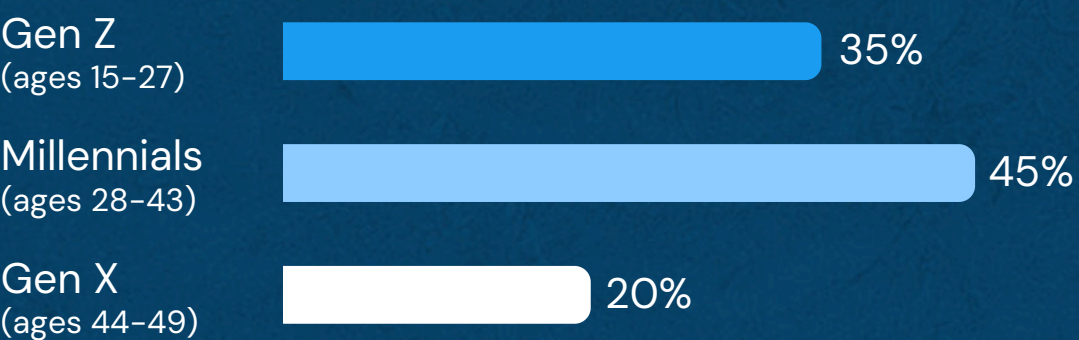
## Occupation



## Parental status



## Age cohort



## Area\*



### \*Area:

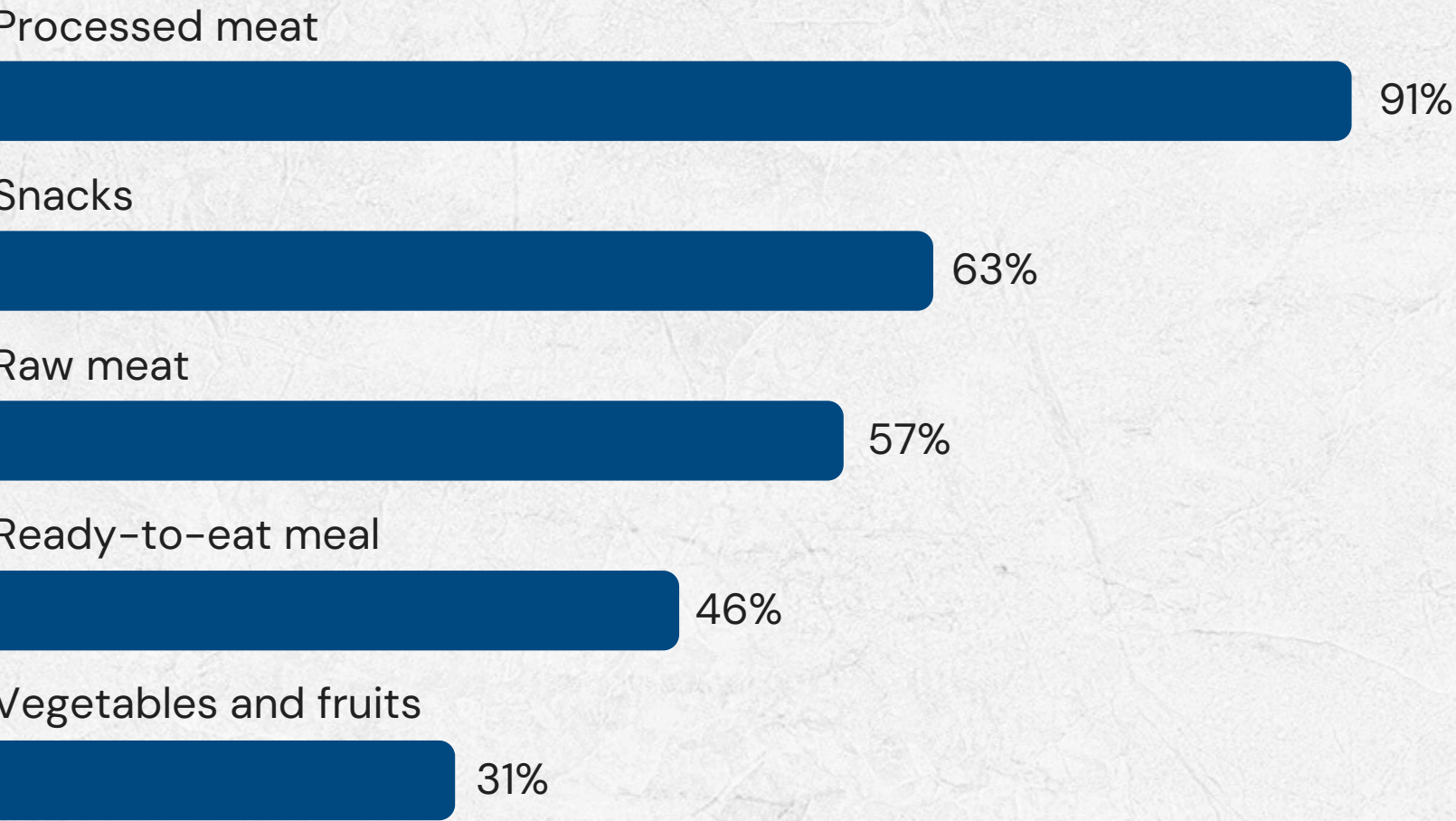
- Greater Jakarta: Jakarta Pusat, Jakarta Barat, Jakarta Selatan, Jakarta Timur, Jakarta Utara, Kota Bogor, Kota Depok, Kota Tangerang, Kota Tangerang Selatan, Kota Bekasi.
- Java: Jawa Barat (exclude Kota Bogor, Kota Depok, Kota Bekasi), Banten (exclude Kota Tangerang, Kota Tangerang Selatan), Jawa Timur, Jawa Tengah, DI Yogyakarta.
- Outside Java: all areas in Sumatera, Kalimantan, Bali, Nusa Tenggara, Sulawesi, Maluku & Papua.



n= 723 respondents that consumed frozen food in the past 6 months

# The majority of respondents consume frozen processed meats

## What types of frozen food do you consume?



When discussing about the most popular frozen food categories, **91% of respondents mentioned frozen processed meat products** like sausages, nuggets, or meatball. Additionally, frozen snacks such as French fries and donuts are also chosen by 63% of respondents.

## Where do you usually buy frozen food?



Only 30% of respondents buy frozen food online

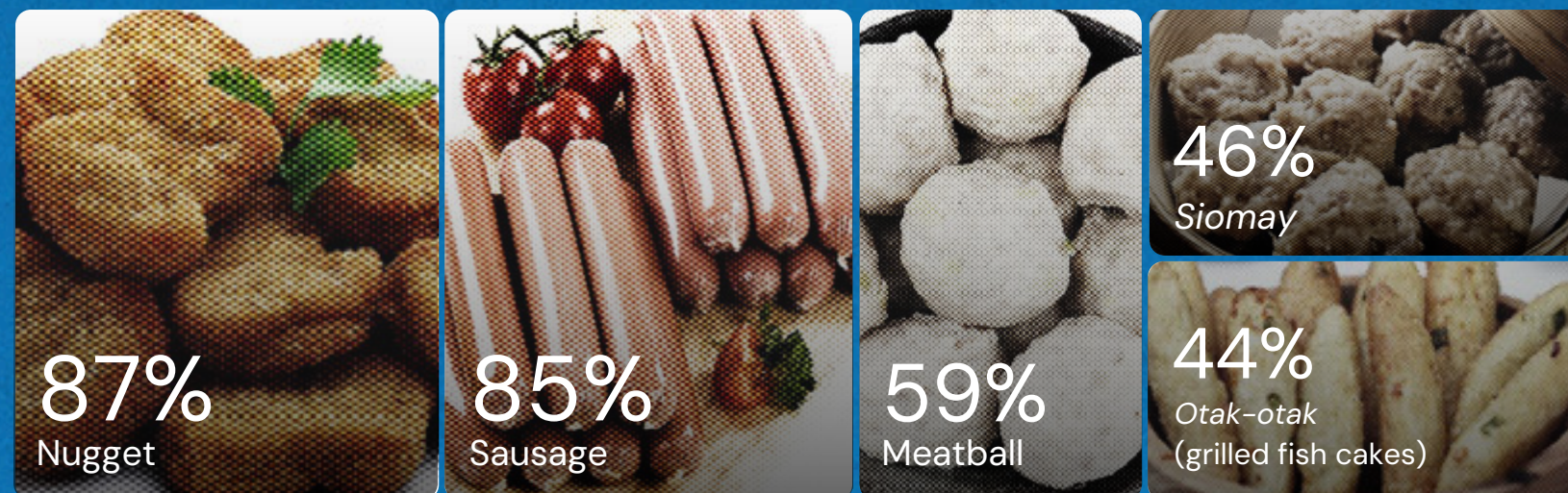




# More than 80% of respondents consume nuggets, sausages, and French fries

## What types of frozen processed meat do you consume?

n= 655 respondents that consumed frozen processed meat in the past 6 months

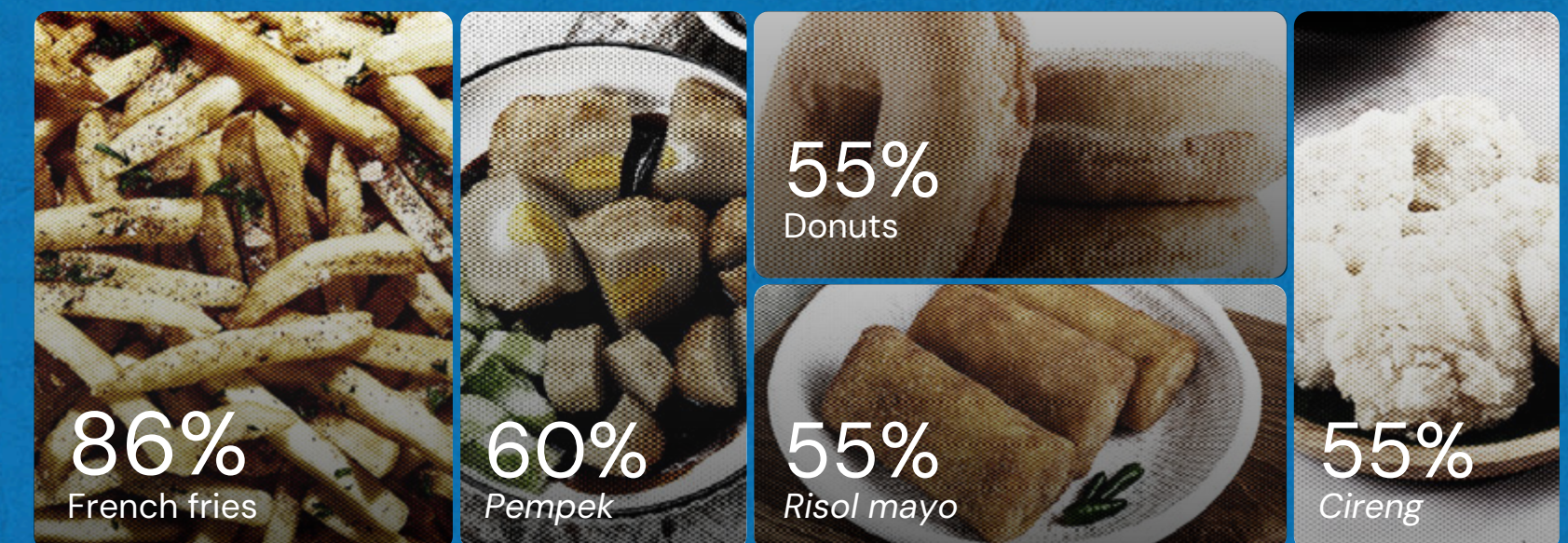


With the variety of frozen processed meat available in the market, **nugget and sausage are the most popular**. They are followed by meatball, *siomay*, and *otak-otak* (grilled fish cakes).

**53% of respondents eat 4–6 pieces of nuggets in one meal**

## What types of frozen snack do you consume?

n= 457 respondents that consumed frozen snack in the past 6 months



**For frozen snacks, 86% of respondents consume French fries**, followed by a popular traditional snack from Palembang, *pempek*.

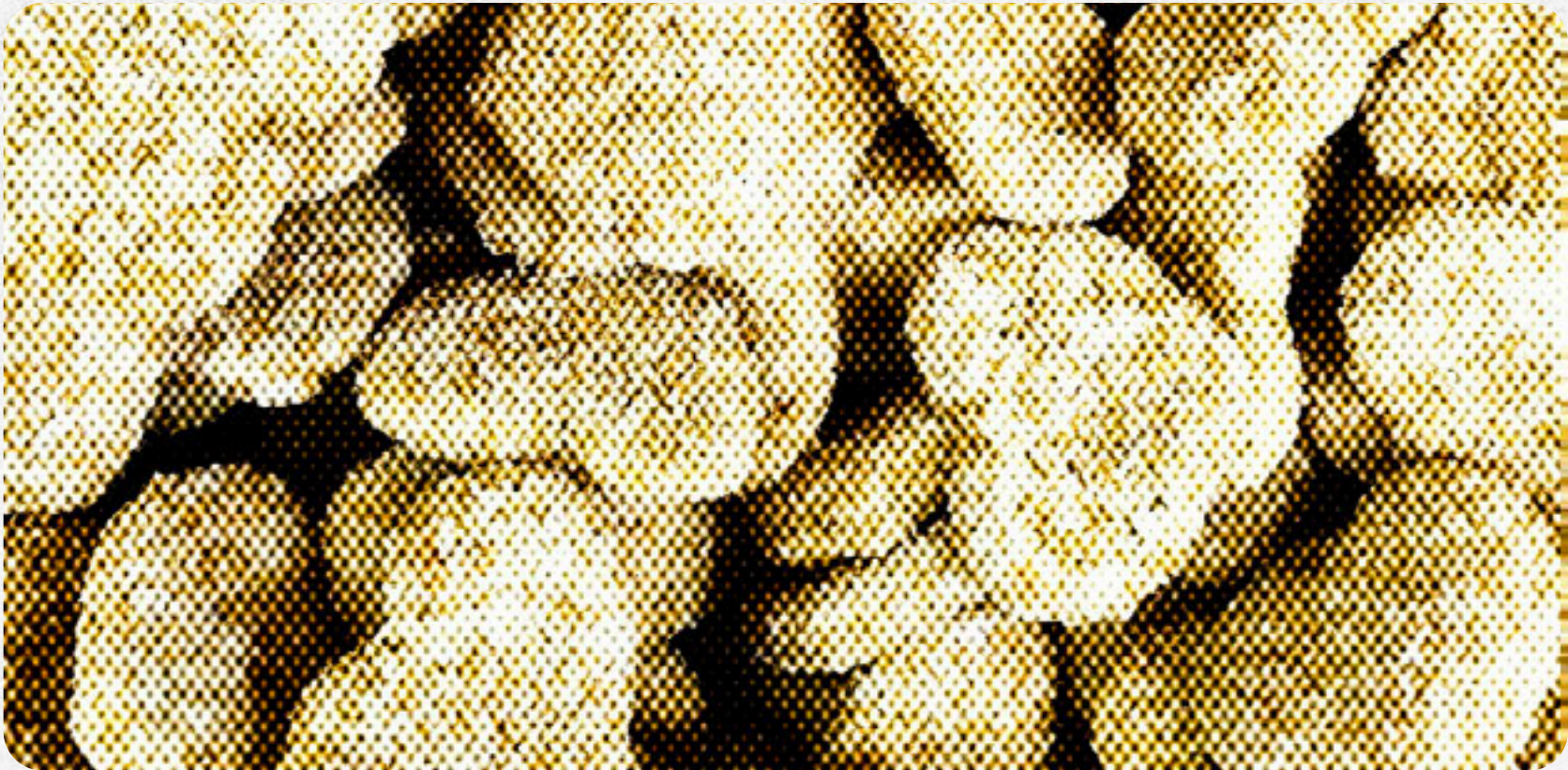




n= 571 respondents that consumed frozen nugget in the past 6 months

# Fiesta ranks first in both brand awareness and usage for frozen nugget

The same five frozen nugget brands appear in brand awareness and brand usage categories. **Fiesta and So Good ranked in the top two brands in both categories.** Meanwhile, despite having a high percentage in brand awareness, So Nice ranked fifth in brand usage, with 48%.



What brand of frozen nuggets do you know?



What brand of frozen nuggets do you consume?\*



\*The options are based on the brands selected by respondents in the awareness question



n= 558 respondents that consumed frozen sausage in the past 6 months

# So Good and Kanzler swap places in brand awareness and usage for frozen sausages

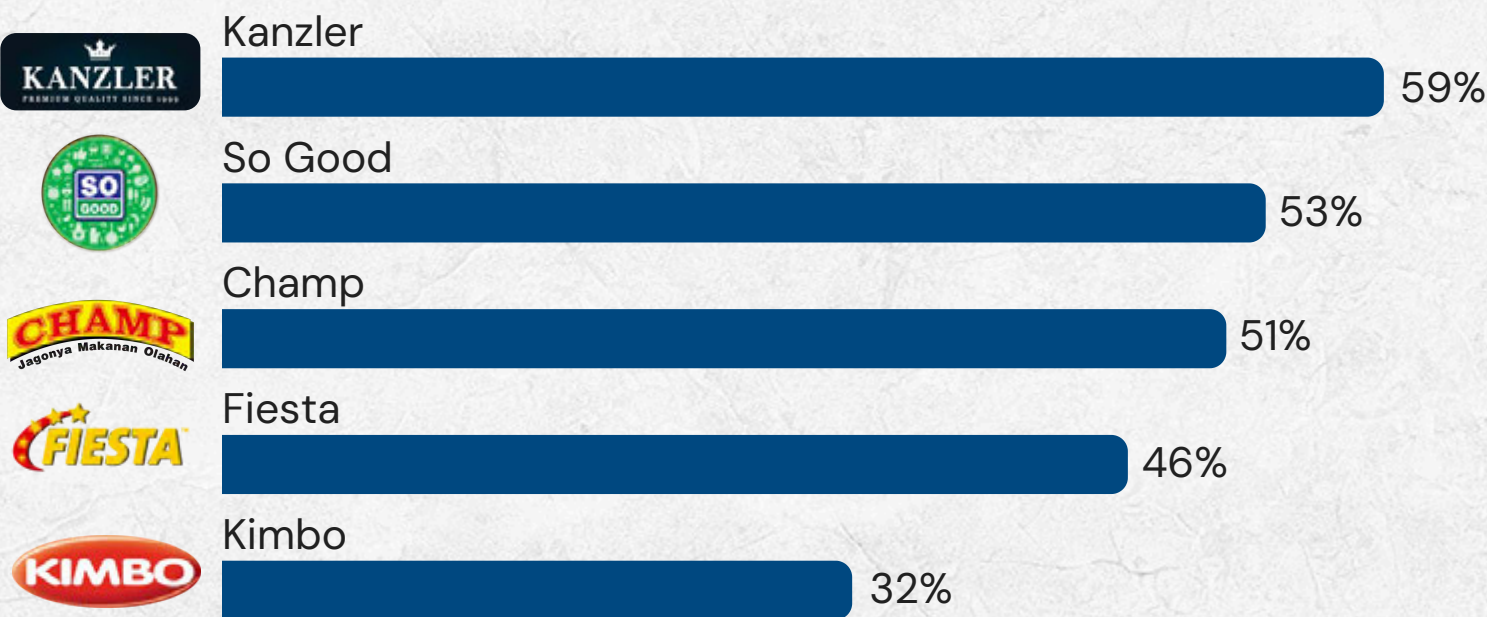
Looking at the most known and most consumed frozen sausage brands, same five brands appear in both categories. **So Good is the most recognized brand, but when it comes to consumption, Kanzler ranks first.** Other brands that appear are Fiesta, Champ, and Kimbo.



## What brand of frozen sausages do you know?



## What brand of frozen sausages do you consume?\*



\*The options are based on the brands selected by respondents in the awareness question



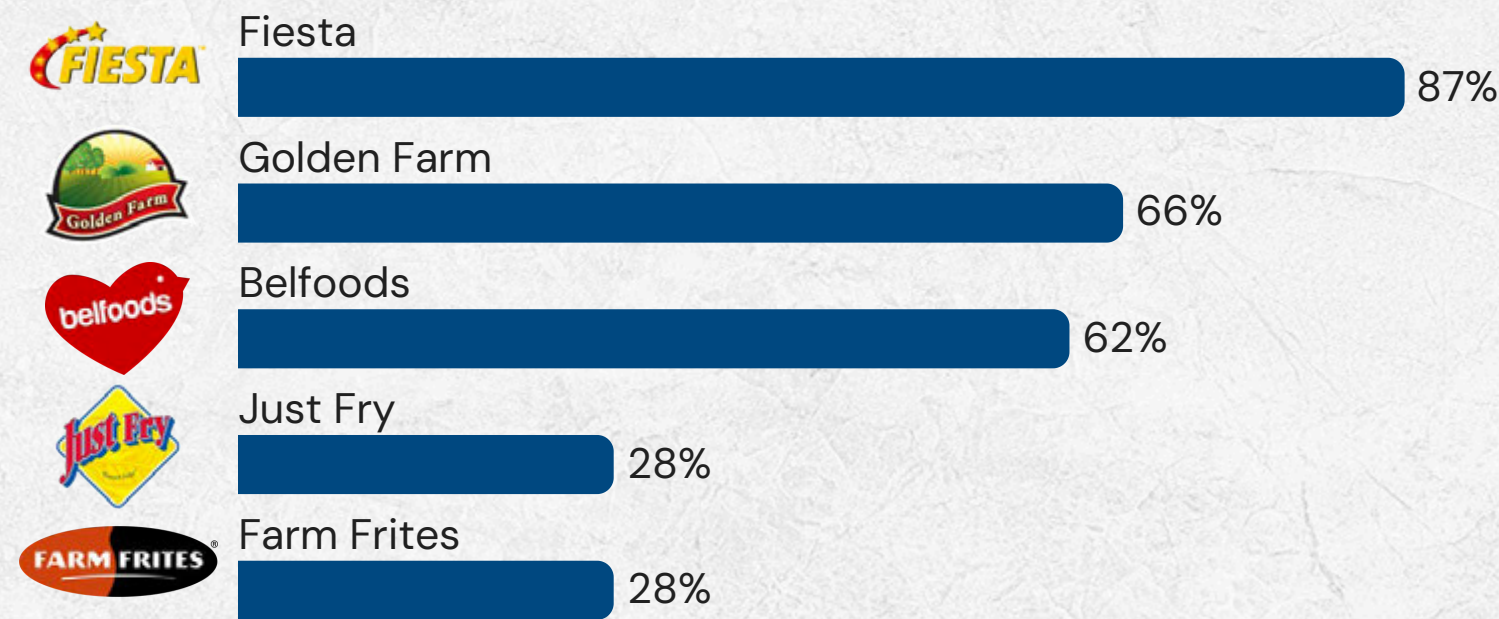
n= 391 respondents that consumed frozen French fries in the past 6 months

# 1 out of 5 respondents consume bulk French fries

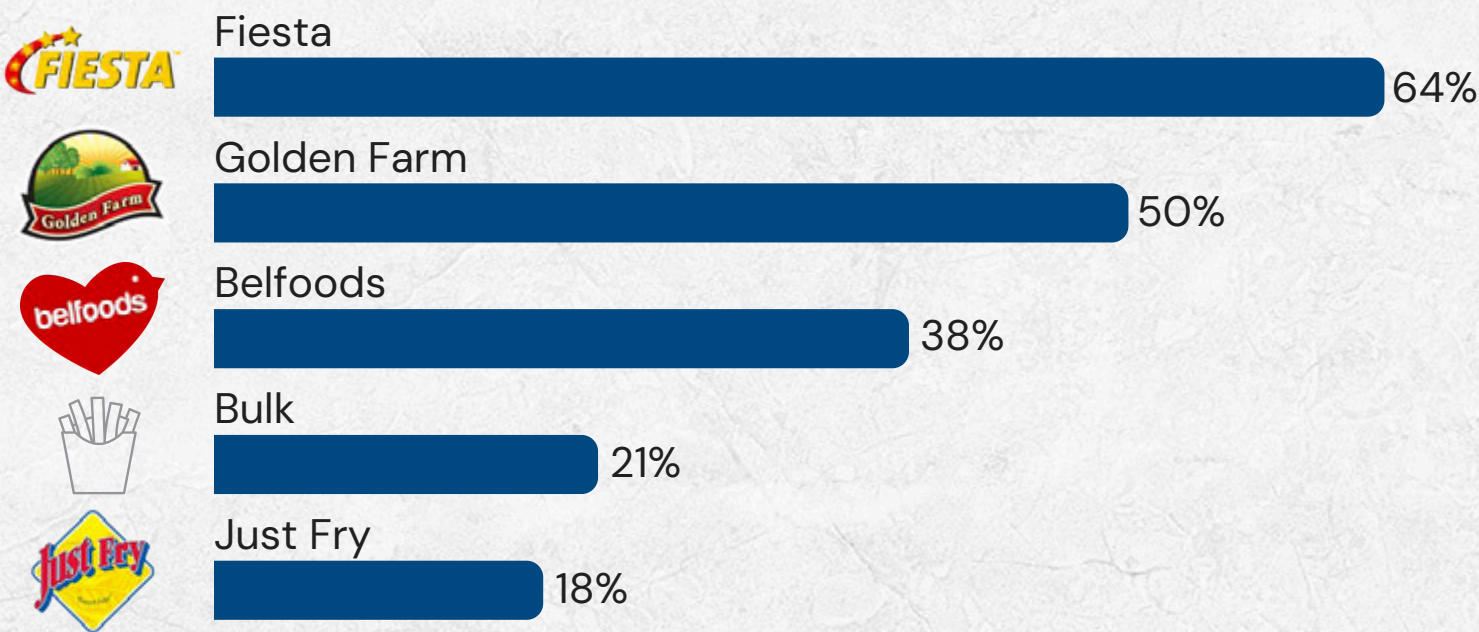
Fiesta, Golden Farm, and Belfoods are the top 3 frozen French fries brands in both brand awareness and usage. Additionally, Farm Frites only appears in the awareness category. 1 out of 5 people consume bulk French fries.



What brand of frozen French fries do you know?



What brand of frozen French fries do you consume?\*



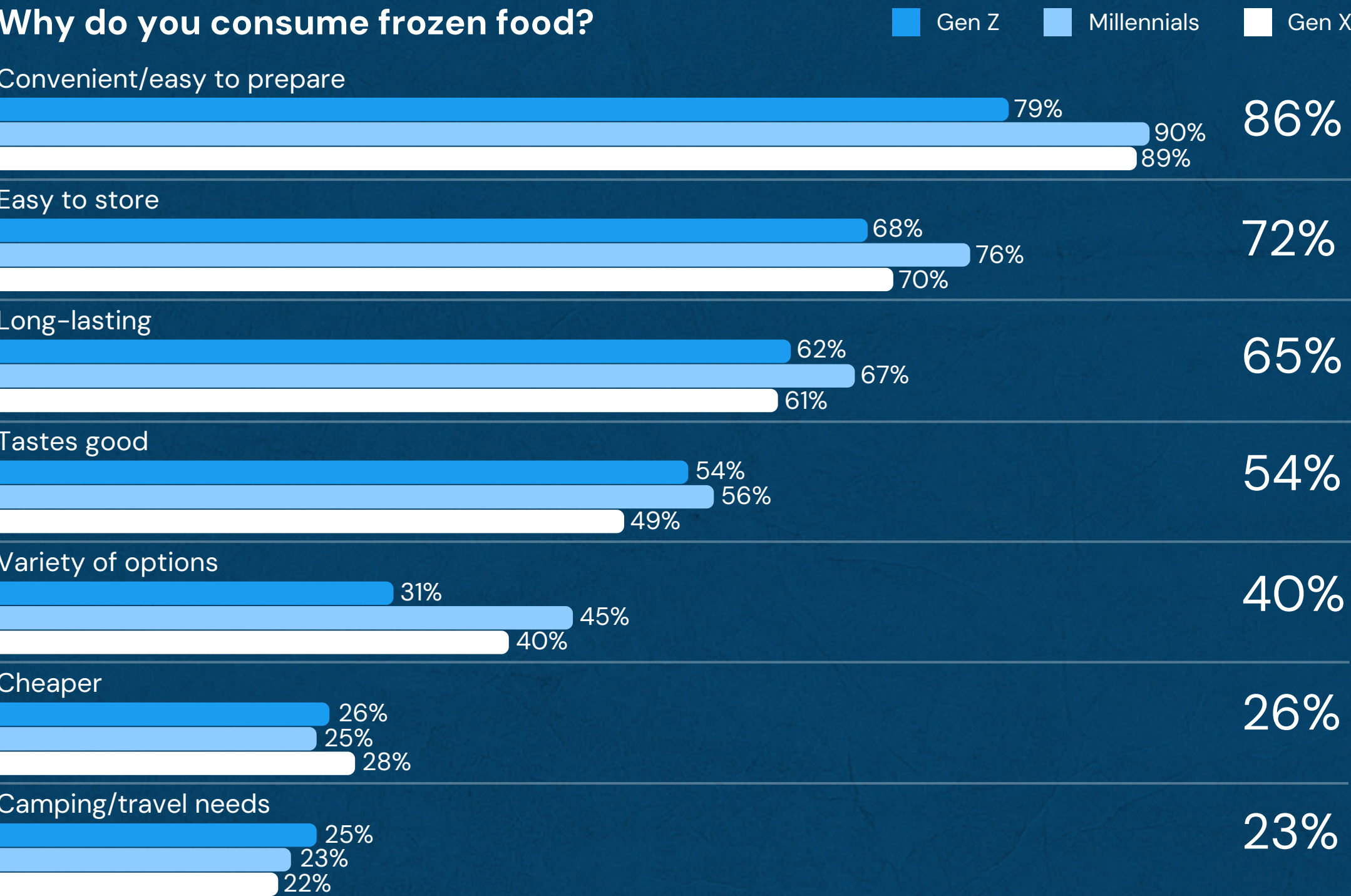
\*The options are based on the brands selected by respondents in the awareness question



n= 723 respondents

# 72% of respondents choose frozen food products because they are easy to store

## Why do you consume frozen food?



The primary reason 86% of people consume frozen food is the convenience of preparation. Easy storage and long shelf life are the next main reasons. The older generations, Millennials and Gen X, are more likely to consider flavor variety options compared to Gen Z.



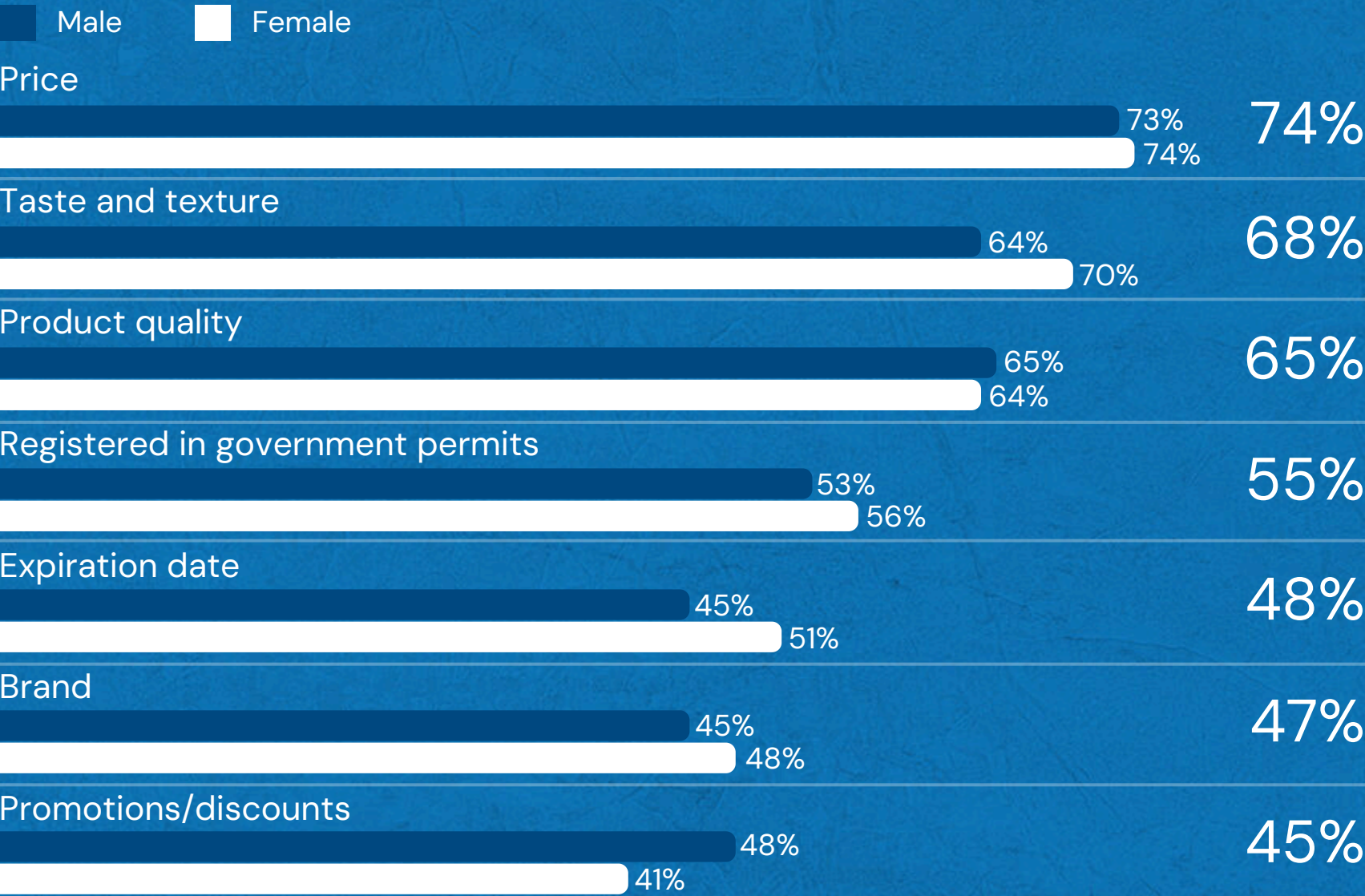
9 out of 10 respondents cook frozen food by frying it



n= 723 respondents

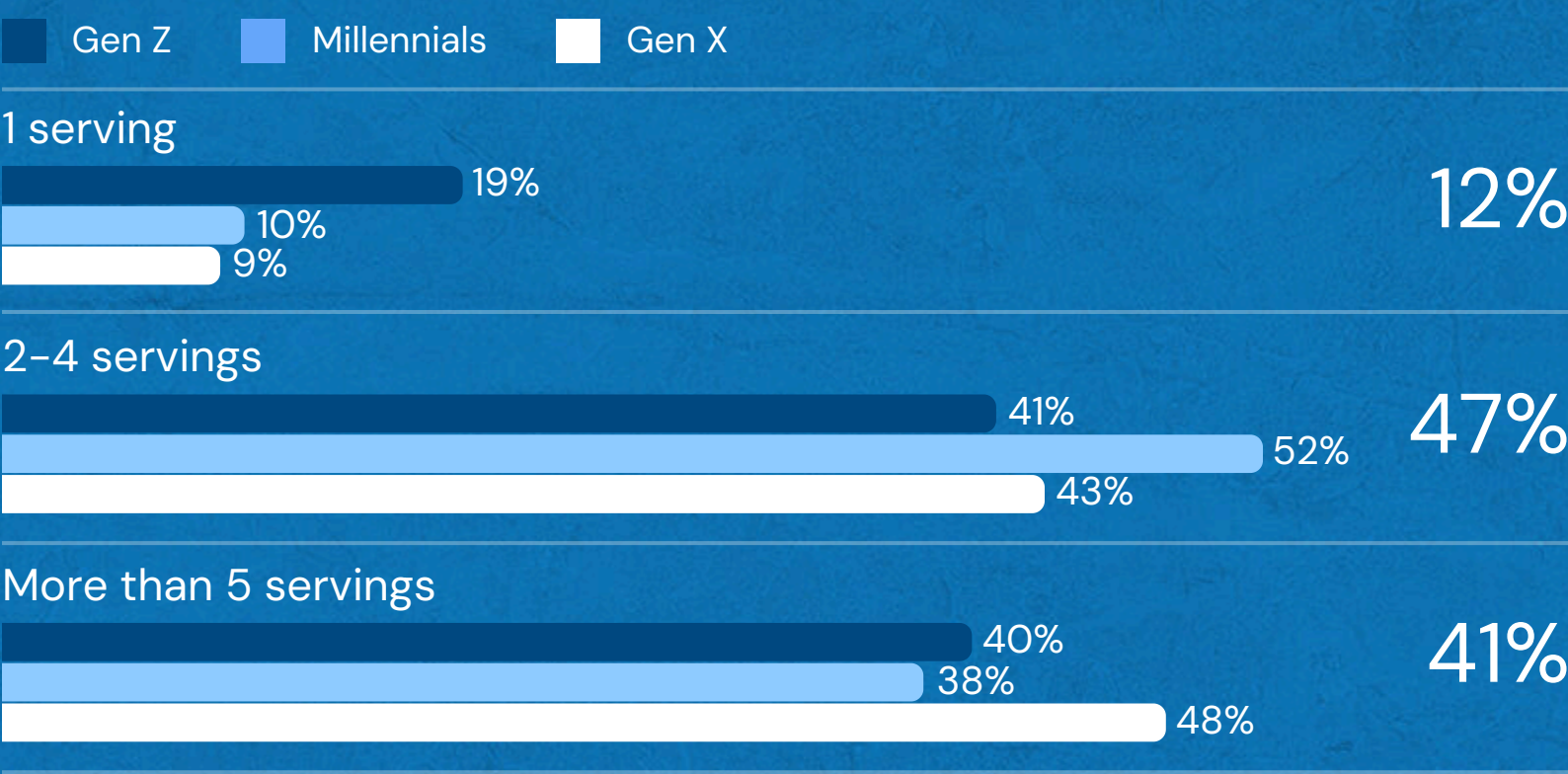
# The taste and texture of frozen food are important for women

## What are your considerations in purchasing frozen food?



Price is the main factor influencing people when buying frozen food. Women consider on taste and texture of the frozen food meanwhile 48% of men focus on promos/discounts.

## What portion of frozen food do you buy?



Each generation has different portion size preferences when purchasing frozen foods. **The younger the generation, the smaller the portion sizes purchased.** Younger individuals are drawn to practical options, especially those with single-serving convenience.



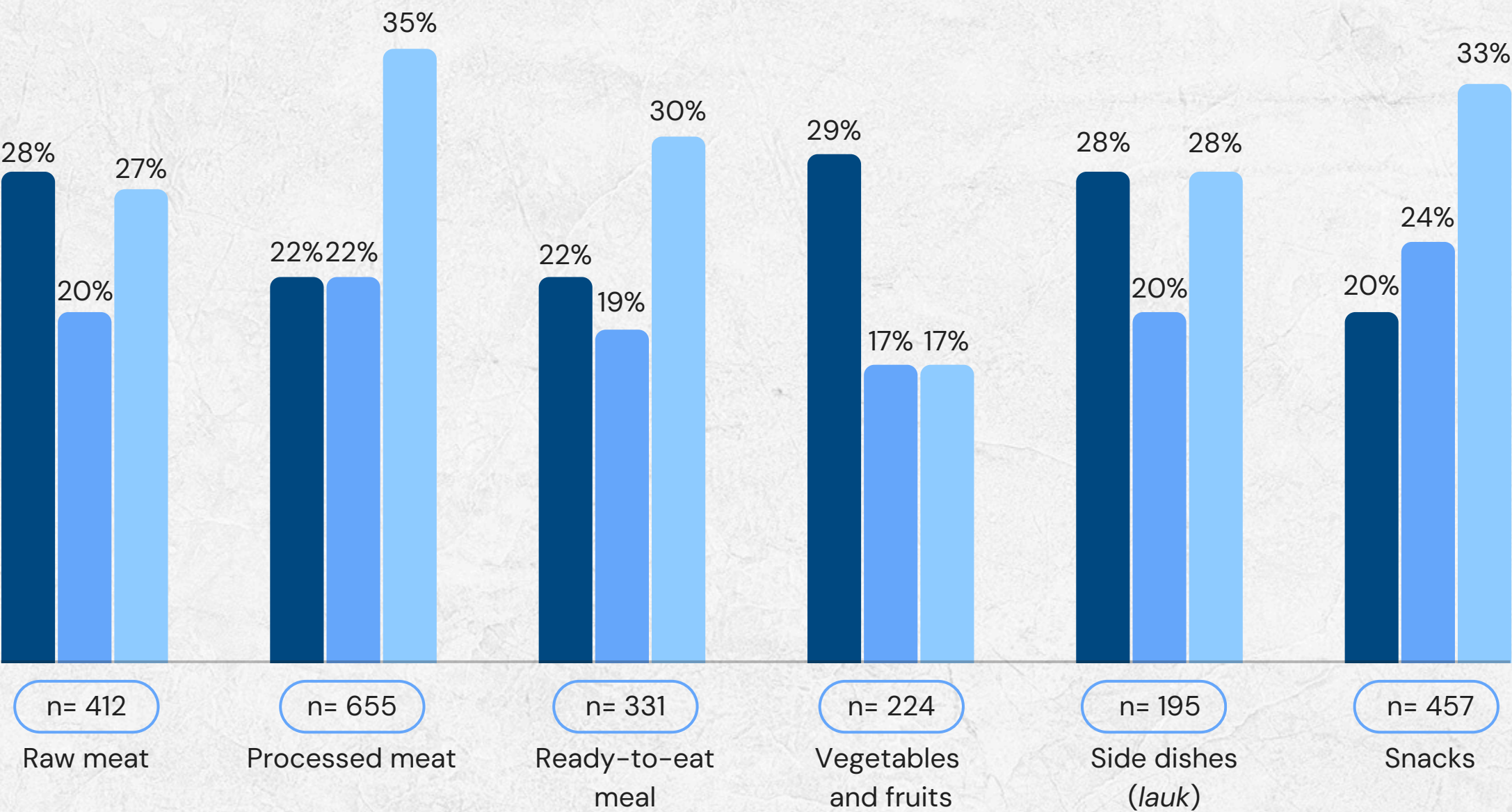


# 35% of respondents purchase frozen processed meat once a month

How often do you buy frozen food?\*

Once a week    Every two weeks    Once a month

\*The number of respondents in each category represents those who have used the product within the past six months



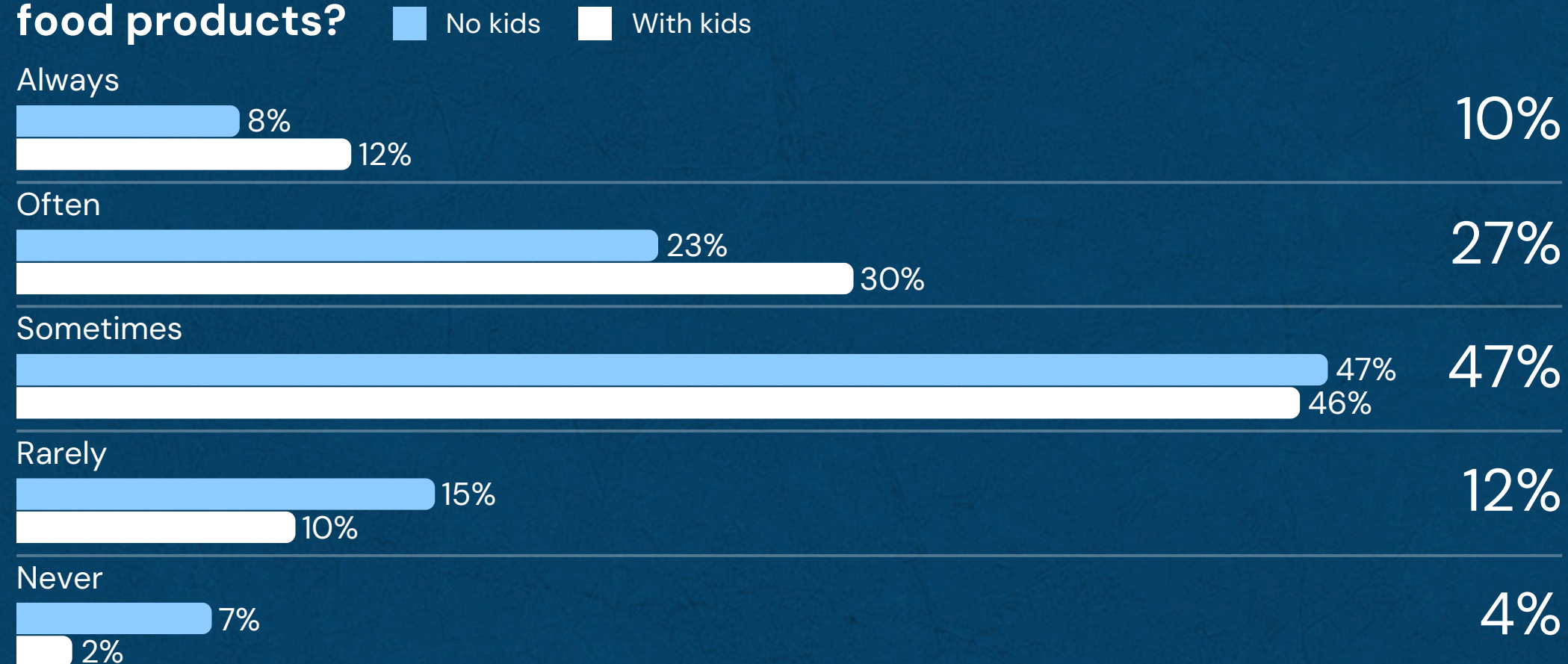
In terms of frequency, **frozen fruits and vegetables are purchased more often**, with 29% of respondents buying them once a week. Meanwhile, most people buy processed meat once a month, possibly to stock up on convenience foods for the month.



n= 723 respondents

# Parents pay more attention to nutritional facts

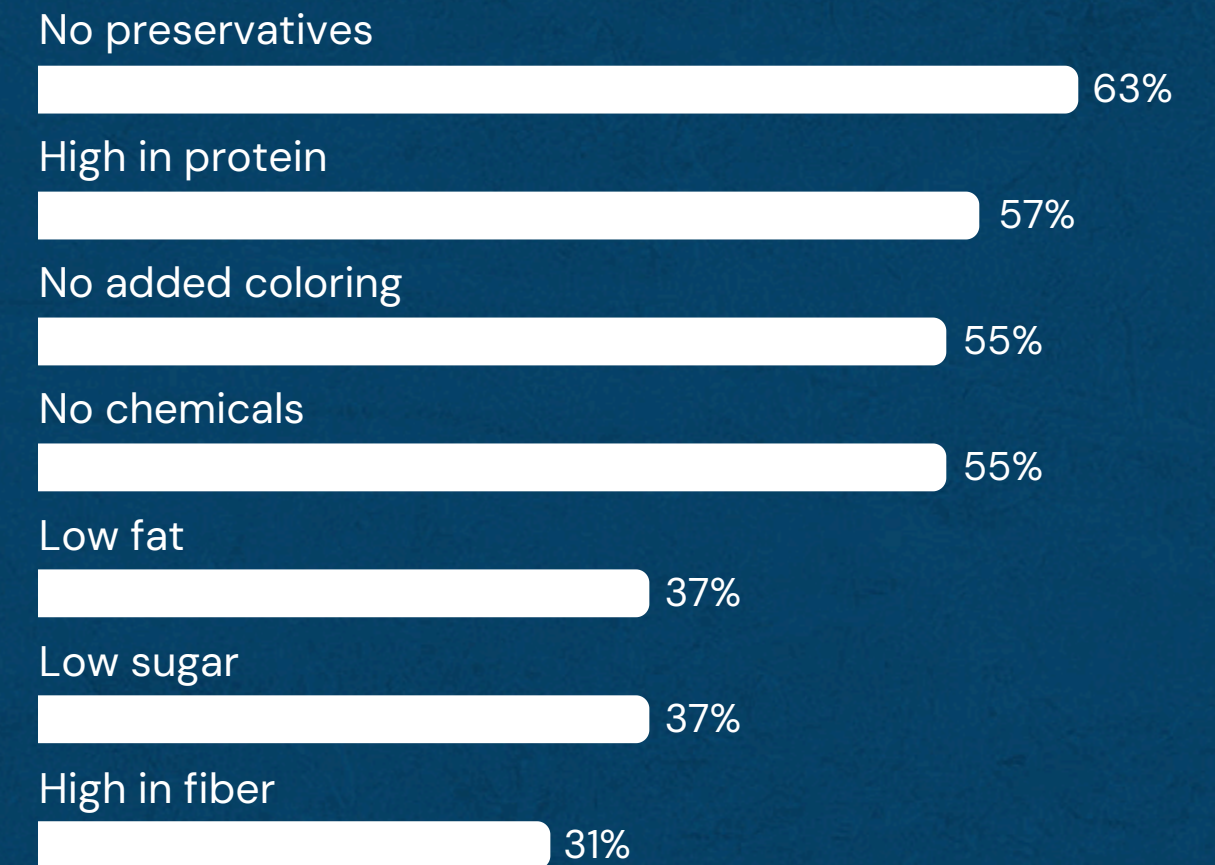
How often do you pay attention to the nutritional information on frozen food products?



Respondents with children are more likely to pay attention to the nutritional information on frozen food, whereas 62% respondents without children tend to do so less frequently.

Nutritional information indicating no preservatives is considered important by 63% of respondents. Other important information includes high protein content, no added coloring, and no chemicals used.

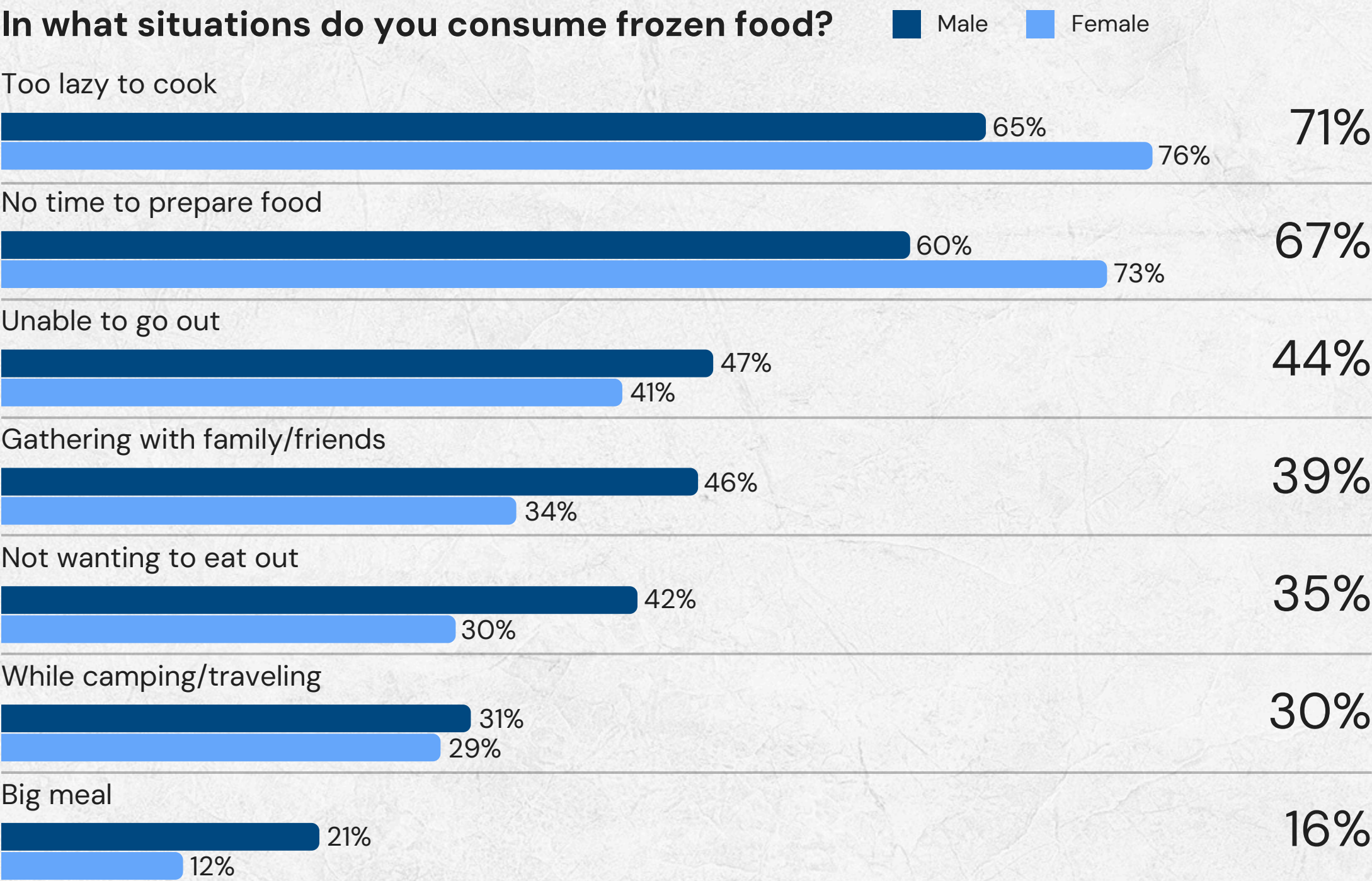
What frozen food nutritional information do you pay attention to?





n= 723 respondents

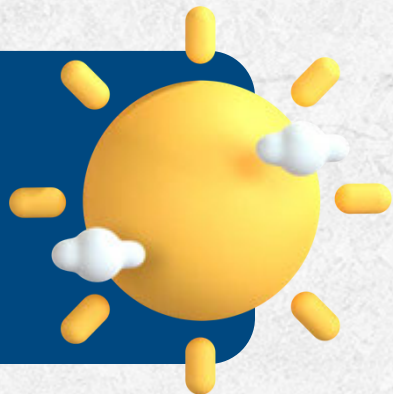
# 1 out of 3 respondents consumes frozen food when they do not want to eat outside



The primary considerations for consuming frozen food are feeling too lazy to cook and lacking time to prepare meals.

Meanwhile, situations such as unable to go out and gatherings with close ones are the next reasons, frequently chosen by men.

The most common times for consuming frozen food is in the morning

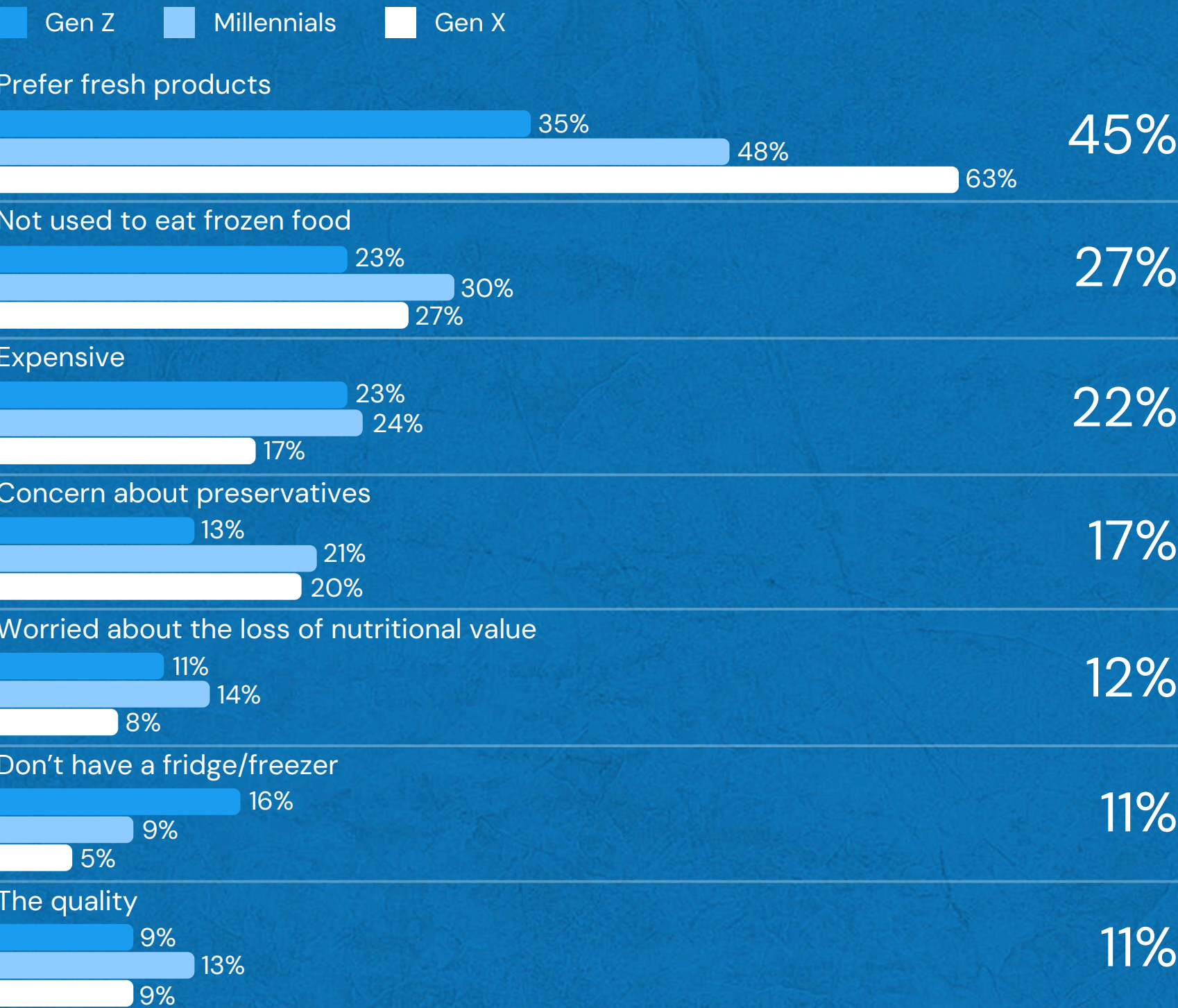




n= 523 respondents that do not consume frozen food

# Gen X has a strong preference for fresh products

## Why don't you consume frozen food?



Those who do not consume frozen food share various reasons. **The main reason is a preference for fresh products, especially among Gen X.** Meanwhile, 30% of Millennials are not used to eating frozen food, and 16% of Gen Z admit that they don't have a fridge or freezer to store it.

**66% of respondents are interested in consuming frozen food, but it depends on the product**



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