

Frozen

STOCK A WINNER FOR DINNER



WINNER OF BEST ROAST

Winner of the Good Housekeeping Christmas Roast Potato Taste Test 2019 & Joint Winner of the Good Housekeeping Easter Roast Potato Taste Test 2020.

McCain

Roast dinner supremo

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McCain Roast Potatoes
McCain Naked Oven Chips
McCain Home Chips
McCain Crispy French Fries
McCain Jacket Potatoes
McCain Sweet Potato Fries
McCain Skin on Fries
McCain Gastro Chips

↙ McCain is the UK's largest manufacturer of frozen potato products¹ since launching over 50 years ago. The brand continues to remain committed to producing the highest quality and innovative products and responding to the latest trends, which have been success points over the past year, it says. Beyond this, helping feed the nation through Covid-19 was also a key focus for the brand, ensuring no disruption to the production or quality of its retail products.

McCain has a value share of 53%¹ and a volume share of 42%¹ of the frozen potato category, which is currently worth over £748m¹. As a leader in both retail and foodservice, McCain says this allows it to gain cross-channel insight into what consumers are enjoying in and out of home and the best products to suit each meal occasion. This insight also allows the brand to maintain a strong position in the frozen aisle.

Serve a winner for dinner

The company prides itself on offering the perfect roasts, whether it's for a Sunday roast, Christmas dinner or special family celebration. With more consumers spending time at home and cooking meals, this creates more opportunities for shoppers to cook a full roast dinner with all the trimmings, maintains the company.

"McCain Roasts provide a high-quality frozen potato that aims to replicate the authentic taste of homemade roast potatoes," it says. "This has been endorsed by the brand winning the Good Housekeeping Christmas taste test in 2019 and becoming a joint winner of the Easter taste test 2020 for best frozen roast."

The company also made the decision



“We made a massive change when we decided to baste our roasts rather than batter them, to ensure we can give them a homemade taste”

to baste its roasts just like consumers do at home, rather than batter them, which tends to be the industry norm. Additionally, the brand also offers Gastro Roasts, providing consumers with a more premium option with potatoes basted in goose fat.

Naomi Tinkler, McCain category controller, says: "We are dedicated to creating authentic roasts that are easy to prepare and can be enjoyed around mealtimes where there is a strong feeling of togetherness. With more people dining in and enjoying roasts at home, there is a real opportunity for frozen brands to showcase the benefits of frozen food, such as the lack of food waste and the nutritional benefits.

"Taste is also really important when it comes to roasts and we made a massive change when we decided to baste our roasts rather than batter them, to ensure we can give them a homemade taste," she adds.

"With the colder months fast approaching, we remain committed to staying front of mind for shoppers and helping them stock up for their Sunday roasts and Christmas dinners."

Sources
1 IRI, 52 w/e 12 September 2020

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Analysis

Shoppers warm to frozen

Consumers are increasingly discovering that the frozen food aisle has become more diverse and attractive in recent years, shedding its staid image and providing a broad variety of options that is taking the challenge back to chilled

 If frozen food had needed a way to thaw out any chilliness in the category's sales, then this year's Covid-19 lockdown was it.

Denied the opportunity to eat out at pubs and restaurants and needing to make an increased number of meals at home, consumers turned in their droves to frozen foods as a convenient and resourceful way to inspire variation in the lockdown diet.

Moreover, with frozen food suppliers having become increasingly innovative in their new product development in recent years, there was no lack of options for shoppers to choose from and, as panic buying set in initially, the supermarket freezers emptied rapidly.

Now, half a year on from the onset of Covid-19, the frozen food market is showing signs of longer-term sales success. Latest data from Kantar and

the British Frozen Food Federation reveal that sales of frozen foods in the UK have continued to surge, rising by £221m in the three months to 6 September, up 9.9% in volume and 13.6% in value. These latest figures are a slower trajectory than the previous three months, when sales rose by £285m (end of March to 14 June), value was up 19.4% and volume rose 17.5%, but they are indicative of a momentum that began back before the start of the lockdown.

In the 52 weeks ending 6 September, frozen outperformed the overall grocery category, rising by 9.7% in value to £6.9bn (vs 8.5% for total grocery) and 8.4% in volume (vs 6.7%). During this period, the frozen category has added £617m in sales value and has outperformed fresh and chilled in percentage growth terms. This

compares to a market that, back in early 2018, was pretty flat with IRI data showing just a 3.7% rise in frozen value sales in the UK¹ and a volume down by 0.6% versus the previous year.

Effect of lockdown

There is little doubt that consumers' attitudes towards frozen foods are changing, with a growing realisation that they are high-quality, convenient and ensure reduced waste compared to chilled, as they are used when needed.

However, along with that has come a combination of other factors that have served to enhance the sector's reputation among shoppers – not least innovation from suppliers and healthier eating, both of which have helped to propel the sector forwards.

“The boom in at-home eating occasions changed the field for frozen,



£221m

value sales of frozen foods
in the UK, three months to
06.09.20

Kantar/British Frozen Food Federation

8.4%

volume rise in frozen foods
in the UK, 52 w/e 06.09.20

Kantar/British Frozen Food Federation

600m

the number of extra eating
occasions each week
during lockdown

Kantar, 4 w/e 12.07.20

£6.9bn

value of frozen food sales
in the UK, 52 w/e 06.09.20

Kantar/British Frozen Food Federation

as shoppers had to cater for around 600m extra eating occasions² each week,” says Gareth Roberts, head of category management at Young’s Seafood. “Immediately after lockdown, in-home eating occasions went from an average of 5.2 billion per four-week period to just over 7 billion. Consumers turned to frozen as a convenient and cost-effective way to help plan for these additional meals, helping to keep evening meals interesting and limit food waste, due to its long shelf-life.

“Frozen fish and seafood has performed very strongly during this period, now the second-largest category in frozen. It’s a healthy source of protein that’s easy to build into a weekly repertoire with firm family favourites and indulgent treating options.”

Birds Eye marketing director Sarah Koppens agrees that lockdown has had

“a profound impact” on the frozen food category. “During the initial stages, we saw a surge of incremental buyers across many of our brands and product lines,” she says. “Approximately two million extra people bought into our brands across a four-week period³, with a high number of these new shoppers from smaller, younger households

“This growth has been sustained as many shoppers have experienced the benefits of frozen first-hand – namely, the quality and the convenience the category offers. People are continuing to not just fill their freezers once to have ‘emergency’ options to hand, but are actively incorporating more frozen products into their meals, which is likely to keep demand higher for a sustained period of time.”

Itsu [grocery] category manager Lorna Douthwaite says the brand “saw

the benefit of customers increasingly looking to replicate the much-missed restaurant experience at home”, also choosing items they were unable to recreate themselves with ease. As a result, she says, the company’s bao’bun and gyoza ranges witnessed 198% and 44% uplifts⁴ respectively since the start of the lockdown.

Healthy eating

The success has been widespread across the frozen category, from seafood to vegetables, meat-based to plant-based, with sales also spurred by consumers’ growing concerns with eating healthily.

Greenyard Frozen commercial director Brendan Legrove reports “positive growth in the frozen veg category across all products” and an “influx of new shoppers into the

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frozen fruit and veg category during lockdown”.

One of the main beneficiaries, however, has been the frozen fish and seafood sector. Whitby Seafoods maintains the frozen coated seafood market is up 29.1%⁵, with the category “ticking a lot of boxes for consumers at the moment”.

“Scampi, in particular, has seen 43.7%⁵ growth, attracting new shoppers (penetration is up by 28.9%⁵ in the 12-week period),” says sales and marketing director Laura Whittle. “This was so notable that the BBC’s *The One Show* travelled to Whitby to cover the amazing growth in frozen scampi⁶.”

Fish has benefited significantly from the increased shopper attention on frozen foods, says Young’s Roberts, who notes that the “fastest-growing demographic [for its brand] during lockdown was more upscale, younger pre-families who had previously been hard-wired to buying chilled products”.

“These shoppers are driven by health considerations, freshness and a desire for high-quality produce,” says Roberts. “Between February and March alone, we saw over 700,000 additional new shoppers come to Young’s⁷ and frozen fish overall increased sales by 18.3% (£14.5m), attracting an extra 1.2 million shoppers⁸.”

“Health is high on the agenda for many consumers and we’ve seen shoppers turn to the frozen category to support their dietary needs,” adds Koppens at Birds Eye. “As a nation we are falling behind when it comes to the amount of fish we eat every week, with the average Brit only eating 1.3 portions per week (compared to the NHS’ recommended guideline of two portions per week). As the biggest brand in frozen fish⁹, we can play a huge role in helping consumers to make better, healthier choices.”

The company has broadened its fish offer with a range of Crunch Traybake products, containing 100% fish fillets.

Plant-based drive in frozen

Meanwhile, meat-free supplier Quorn Foods points to the continuation of “a significant move towards meat reduction, with one in five¹⁰ Brits cutting down on meat consumption during the Covid-19 pandemic”.

Gill Riley, marketing director at Quorn Foods UK, says: “There has



been an accelerated demand for quick, healthy and sustainable meal options that are suitable for the whole family.”

She reports a 33%¹¹ rise in Quorn Crispy Nuggets in the first four weeks of the UK’s lockdown alone and says there has also been higher demand within ingredients sectors across food categories as people found more time to take to scratch cooking more often. “Quorn’s frozen ingredients range has seen some of the biggest unit gains, specifically Quorn Mince, Quorn Pieces and breaded SKUs, such as Quorn Nuggets, Fishless Fingers and Fillets¹².”

“We started to see this level out as the restrictions were eased, but there’s a sustained increase in meat-free shopping and sustainable nutrition and we don’t expect this to slow down,” she adds.

Koppens at Birds Eye agrees that the adoption of plant-based diets has been another key health trend that has stretched into the frozen aisles. “During lockdown, shoppers have sought out more plant-based meals in a bid to expand their repertoire and experiment a little bit more,” she says. “Meat-free main meals grew by 43%¹³ and plant-

Changing consumer attitudes

For a long time seen as the poor relation to chilled foods, the frozen food category is increasingly coming into its own as suppliers innovate and hit home the message of quality and value, alongside the convenience of their products. “The frozen category is undergoing a renaissance,” says Itsu [grocery] category manager Lorna Douthwaite. “Where previously a lack of premium quality or any discernible innovation gave frozen food a poor reputation, freezer cabinets are now becoming a destination for shoppers looking for exciting new cuisines to try.”

Whitby Seafoods sales and marketing director Laura Whittle agrees, saying: “Consumers have become more aware of what they

are eating in the frozen category and it is no longer seen as the poor relation to chilled. People expect the products to have the same sustainability and quality standards, just at a lower price. During lockdown, people paid more attention to their health and food options, but also wanted food that was a treat and something special to make up for the lack of dining out opportunities.”

The overall perceptions of frozen food have steadily improved over the last few years, notes Sarah Koppens, marketing director at Birds Eye.

“However, the increased range of high-quality frozen products, combined with lockdown, has driven a more rapid change in positive attitudes among consumers towards the category,” she

says, “Frozen food was previously looked upon as a back-up or ‘last resort’ food choice, but shoppers are increasingly seeing it as a modern, innovative category.”

Koppens adds that Birds Eye has worked hard to reposition frozen as something that is “exciting, modern and relevant”. “We’re inspiring shoppers to use a wider range of frozen products at mealtimes, and we’re continuing to educate them on the nutritional benefits to frozen food – how it holds important minerals and locks in the goodness far more efficiently than fresh, which loses nutrients over time.”

Gareth Roberts, head of category management at Young’s Seafood, points to quality, consistency and value as the key drivers in consumer

engagement in the category. “As a result of Covid-19, new shoppers who are looking to satisfy the same needs as in chilled are discovering that frozen – and frozen fish specifically – offers outstanding quality when preserved in a natural way. This is alongside its obvious benefits of convenience, easy meal-planning, portion control and cost. Quality will continue to drive shoppers into the frozen aisle.

“The consistency of frozen products will continue to draw shoppers into the category and frozen offers excellent value in a number of ways – food waste is limited as it does not have to be consumed in the same time as chilled... and it also offers great value in terms of time, as a delicious fish dinner can be prepared an

on the table in less than 30 minutes with little to no preparation.”

Brendan Legrove, commercial director at Greenyard Frozen, believes: “We are on the cusp of a change in the perception of frozen fruit and veg. Currently, these categories are seen as convenient and value for money, but not exciting or necessarily flavourful. As people have shopped more frozen products over lockdown, they have seen that frozen can offer them great, flavourful meal solutions, often easier than fresh.”

Quorn Foods marketing director Gill Riley adds that the meat-free company expects to see a continued increase in scratch cooking and believes this will play “a huge role in shopper habits across the frozen aisle”.

based main meals increased by 50%¹³ in the weeks immediately following the UK lockdown coming into effect.

“Shoppers are looking to the nutritional benefits associated with pea and soy protein meat alternatives, which recreate the taste and texture of meat more closely than ever. Pea protein is also particularly high in iron content. In fact, our Birds Eye Green Cuisine burgers provide 29% of an adult’s GDA for iron, helping to sustain the levels often lost by consuming less meat.”

She also points to gluten-free options becoming more prevalent in the

sector as the frozen free-from category provides “another important growth area”. “Over the last year we’ve seen more gluten-free options being added to the frozen aisles. Shoppers are as keen as ever to include gluten-free alternatives of their favourite foods, which has benefited the free-from pizza segment, now worth £14m and up 42% over the last two years¹⁴.”

Seeking comfort

While consumers are seeking healthy options, they are also driven by the need for familiarity and comfort in their

meal selection, and Koppens maintains the strength of Nomad Foods’ portfolio, with its Aunt Bessie’s, Birds Eye and Goodfella’s ranges is built upon the “familiarity, comfort and convenience that we can offer shoppers, particularly in times of uncertainty”.

“Regardless of what the next few months hold, we’re confident that the popularity of frozen will remain long term and many of the new shoppers will stay in the category,” she says.

Whittle at Whitby Seafoods agrees that comfort food, nostalgia and the need for provenance are the trends

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most relevant to the business. “Scampi is part of our British culinary heritage,” she says. “We all saw pictures in the summer of consumers heading to the seaside, perhaps keen to recapture a time where life was more predictable. This again links to our brand growth, as Whitby, based in the North Yorkshire fishing town of the same name, reminds people of family holidays by the sea. Our scampi is linked to this need for comfort and nostalgia.”

Frozen potato firm McCain has also taken a different tack with its roast potatoes, deciding to baste them rather than batter them to give consumers more of homemade taste, says category controller Naomi Tinkler. “With more people dining in and enjoying roasts at home there is a real opportunity for frozen brands to showcase the benefits of frozen food,” she adds.

Sustainability in action

One of the key arguments frozen food suppliers have in their armoury when it comes to competition with the chilled category is the relative lack of food waste generated by shoppers buying and consuming frozen.

Food waste can generate huge costs to industry and consumers alike, and the pressures of lockdown on finances have led shoppers to reconsider the extra benefits of frozen food when it comes to food waste, according to Birds Eye’s Koppens. “In a recent research piece that Birds Eye, in partnership with Iceland Stores, commissioned from the Manchester Metropolitan University, 47% of those polled expressed that they are far more conscious of the food their household is wasting since March¹⁵,” she says. “The beauty of frozen is that shoppers only cook what they need, saving the rest for another day, creating less food waste and, consequently, saving money too. In fact, in 2019, over £188m worth of food was wasted nationwide each week – this works out as for every £1 spent at the till, more than 15p was wasted due to the amount of fresh food thrown away¹⁶. The perception of frozen food has therefore changed as shoppers turn to the category to reduce the amount of food and money they waste.”

Both Whitby Seafoods’ Whittle and Young’s Seafood’s Roberts point to the boom in online shopping as beneficial to the frozen category.

“Going forwards, frozen will continue to play an important part in customer spend across all drivers, especially with the growth in online shopping, which allows consumers to access more information about the products and ingredients/nutrition quickly,” says Whittle.

Roberts adds: “The boom in online shopping – a quarter of Young’s sales are now going through online – has allowed more people to enjoy the value of frozen fish food, without some traditional barriers in place, such as a hesitancy to transport it home because of the fear of defrosting.”

Quorn’s Riley says it was the first major meat-free brand to roll out carbon labelling on its packs “helping shoppers to make informed decisions at point of purchase”. This is now in place on 37 of its frozen SKUs. “Consumers are increasingly recognising the need for more sustainable diets that are less harmful to the planet, with 60%¹⁷ aware that reduced meat consumption is beneficial to the environment,” says Riley. “When swapping one meal from beef to Quorn Mince, you can save

greenhouse gas emissions equivalent to charging your phone for two years¹⁸. Huge numbers are now reducing their meat consumption and this is partly driven by sustainability, with 67%¹⁰ citing ‘protecting the planet for future generations’ as the reason for wanting to reduce their carbon footprint.”

The company will be supporting its Quorn Mince with a three-week TV campaign from 17 November, as part of its ‘Step in the Right Direction’ drive to show shoppers how easy it is to make sustainable choices, she adds.

Retaining loyalty

What all the players in the frozen food arena agree on, however, is the importance of building on the momentum gained during the Covid-19 lockdown, as well as retaining the loyalty of new shoppers, particularly younger consumers, who are really discovering the benefits of buying frozen for the first time.

Birds Eye’s Koppens says: “The opportunity present to frozen foods brands now is retaining new shoppers that entered the category earlier in the



From chips to gyoza: category NPD

Earlier in the year, Young's Seafood launched its new Chip Shop quarter pounder to provide an option for a more casual dining occasion, as well as "to entice teenagers and young adults into frozen fish as we could see there was a gap and demand", says the firm's head of category management Gareth Roberts. In addition, the company targeted the more health-conscious consumer with its Chip Shop Lighter range, with 45% less saturated fat, and also introduced Young's

Kitchen to provide recipe inspiration and ingredient swaps, with products such as Scampi Caesar Salad.

Frozen potato specialist McCain has also played the health card, with the launch of Naked Oven Chips "repositioning its Original Oven Chips as a modern and healthier option", says marketing director Mark Hodge.

Directly targeting the rise in plant-based diets, Birds Eye has introduced a plant-based version of chicken dippers to its Green Cuisine label. "With 39.4% of UK

households enjoying our chicken productsⁱ, we're in the unique position to replicate meat-free versions and encourage shoppers to experiment with what the frozen plant-based category has to offer," says marketing director at Birds Eye Sarah Koppens.

The company has also brought out meat-free cooking mixes under the same brand, with each variant combining a pea protein meat substitute with vegetables and sauces in three flavours: Bolognese, Mexican-style Fajita and Chilli

Con Carne.

With 86%ⁱⁱ of plant-based meals now eaten by non-vegans, says Itsu [grocery], this month, the company has introduced teriyaki chick'n vegan gyoza, its first launch into the meat-free area of the frozen aisle.

Following "capacity enhancement", Quorn has begun to relaunch several SKUs to the market, starting with Swedish-style Meatballs, which made a return to the frozen aisles in August, with more to come later this year, says the company.

year. Lockdown has impacted us in many different ways, and there will be long-term changes to shopping habits and consumption patterns."

Greenyard Frozen's Legrove picks up on consumers' desire for adventure in their meal repertoires and believes this just as applicable to frozen as to the chilled category. "Looking forward, shoppers will be wanting more adventurous and exciting products that explore world cuisines, as this may be an avenue that they can no longer – or at least to a limited amount – do out of home," he notes. "So, we are always looking to create products with key flavour and cuisine trends in mind."

At Whitby Seafoods, Whittle says £4m of its sales are from category arrivals – people who have never shopped the frozen seafood category before. "Retaining the loyalty of this new customer type is going to be one of our key challenges going forwards. By providing the customer with products that have family appeal, the nostalgia of the British seaside and true British provenance, we will retain this loyalty and carry on growing the frozen seafood

market." To that end, she reveals, the company is planning a multi-million pound advertising campaign in 2021 "to further grow our sales and, indeed, those of our category".

Itsu's Douthwaite notes: "So long as brands focus on delivering quality, the premiumisation of the category will continue at pace." She cites three underlying drivers for continued purchase: good quality – "the success of Uber Eats and Deliveroo takeaway services have made restaurant food more accessible in the home than ever before, driving up expectations"; improved choice – "the traditional frozen offering is often restricted to low-quality party food, but brands like Itsu are extending the choice within freezers as young foodies, looking for more authentic and innovative options, become a growing presence in the frozen aisle"; demand for versatile products – "shoppers want products they can use again and again for different meal occasions".

Roberts at Young's adds: "The major opportunity is to retain these new shoppers in the category. Covid-19

has completely changed the mealtime dynamic for the foreseeable future. Consumers are keen to create simple, yet delicious dinners more regularly at home and finding great variety and convenience within the frozen category. A key driver for NPD in frozen moving forward, therefore, will be the consistent investment and development in ranges to continue to provide the variety that keeps shoppers engaged."

Sources

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²Kantar, 4 w/e 12.07.20

³Kantar, panel data to 22.03.20

⁴Itsu sales out, 26 weeks to 20.09.20 vs previous 26 weeks

⁵Kantar, 12 w/e 08.08.20

⁶The One Show, 17.09.20, <https://www.bbc.co.uk/1/episode/jm000mn70/the-one-show-17092020>

⁷Kantar 4 w/e 22.03.20

⁸Kantar, w/e 17.05.20

⁹Nielsen, Total Coverage, Fish Brands, 52 w/e 05.09.20 (Birds 22.9% value share vs Young's 21.9% value share)

¹⁰The Vegan Society, 2020

¹¹IRI 4 w/e 25.04.20 vs 4 w/e 29.02.20

¹²IRI 9 w/e 23.05.20 vs 41 w/e 07.03.20

¹³Kantar Food & Drink Usage Panel, 8w/e 17.05.20

¹⁴Nielsen data, Total Coverage to w/e 05.09.20

¹⁵www.onepoll.com, 2,000 respondents, April-May 2020

¹⁶Cost, Waste & Taste Comparison of Frozen vs Fresh – report prepared by the Manchester Research Food Centre, Manchester Metropolitan University on behalf of Iceland Foods and Birds Eye, February 2020

¹⁷YouGov data, total sample 14,067 adults, online survey 14.04.20-15.04.20, weighted and representative of all GB adults (18+)

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Birds Eye

Inspiration driving growth

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KEY BRANDS

Birds Eye
Aunt Bessie's
Goodfella's

↙ The last few months have emphasised the important role frozen food plays for the average shopper. Once seen as an 'emergency' option, the category has experienced great growth, not least because of the innovation and inspiration brands such as Birds Eye, Aunt Bessie's and Goodfella's provide to shoppers, says brand owner Nomad Foods.

Growth driven by innovation

NPD that meets developing trends, such as Birds Eye's Green Cuisine range of plant-based products, has successfully driven the frozen category and attracted new shoppers, according to Birds Eye.

Sarah Koppens, marketing director at Birds Eye, comments: "The rise in plant-based diets is a trend we've observed over the last few years, and has continued to increase during lockdown. Shoppers continue to seek out more plant-based meals in a bid to expand their repertoire and experiment a little bit more; meat-free main meals initially grew by 43% and plant-based main meals increased by 50%¹.

"For Birds Eye, it's all about offering families the choice," adds Koppens. "The brand has always had a strong resonance with families, so we're perfectly positioned to offer new shoppers meatless formats of the products they recognise and love – which is why we recently launched Green Cuisine Chicken-free Chicken. We've successfully recreated the taste and texture of our iconic chicken pieces to offer an entirely plant-based alternative."



“The rise in plant-based diets has continued to increase during lockdown”

Families at home

It's not just emerging categories that have seen growth. Aunt Bessie's brand saw positive RSV growth of 2.8% during the first four weeks of lockdown², as shoppers enjoyed more roast dinners from home while they were unable to visit local pubs and restaurants.

Sam Dolan, head of marketing at Aunt Bessie's, says: "The last few months have seen the importance of the roast dinner come to the forefront again, as people are seeking comfort in the warmth and unity it can bring a family. Our new marketing strategy focuses on the power of the roast dinner in creating emotionally poignant moments at dinner tables."

The new campaign also coincides with Aunt Bessie's 25th anniversary, with the brand increasing the size of its Golden Yorkshires by 25% to celebrate.

Families have also been turning to products to help replicate the dining-out experience. With an extra 1.7m buyers buying into the frozen pizza category during lockdown³, Goodfella's has recently launched a new on-pack promotion, giving shoppers the opportunity to win a top prize of £10k (plus hundreds of other prizes) and celebrate the big night in.

Source

¹ Kantar, Food & Drink Usage Panel, 8 w/e 17.05.20
² Nielsen Data wk data; 4 w/e 18.04.20, Total Coverage L4wks
³ Kantar 12 weeks to 19 April

NEW



Green Cuisine

powered by plants



YOU'VE GOT THE POWER

Winner winner Birds Eye chicken-free dippers for dinner

Birds Eye launches a vegan alternative to its iconic Chicken Dippers supported with a NEW campaign coming in January 2021!

Per 5 dippers (oven baked product)

Energy	Fat	Saturates	Sugars	Salt
1040kJ	15g	1.3g	0.6g	1.0g
250kcal				
13%	21%	7%	<1%	17%

Reference intake of an average adult (8400kJ/2000kcal)
Average values per 100g Energy 1040kJ/250kcal



source of PROTEIN | source of FIBRE



Green Cuisine

powered by plants

Chicken-Free DIPPERS

MEAT-FREE

NEW

Deliciously Ella

Indulgent plant-based desserts

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Deliciously Ella Fudgy Chocolate Brownie
Deliciously Ella Chocolate Chip Cookies
Deliciously Ella Apple & Blackberry Crumble

Fast-growing plant-based brand Deliciously Ella reveals it has developed three of its most-loved recipes into a range of frozen desserts, providing “plant-based indulgent treats in a traditionally under-served sector”.

Matt Mills, CEO at Deliciously Ella, says: “As for many brands, the past year has come with its challenges, but Deliciously Ella is proud to have successfully launched delicious NPDP despite the current climate. As 81%¹ of our frozen desserts sales have been incremental to the category, we’re bringing in new, younger and more affluent shoppers to the frozen aisle.”

Like many of Deliciously Ella’s recipes and snacks, the frozen dessert range bridges the gap between plant-based foods and permissive indulgent occasions. It includes Fudgy Chocolate Brownie, Apple & Blackberry Crumble; and Chocolate Chip Cookies.

To introduce the desserts, Deliciously Ella has created several “tempting”



“We’re bringing in new, younger and more affluent shoppers”

videos to share with its highly engaged community of over two million people and is supporting the launch with its first digital marketing campaign to reach consumers who are increasingly looking for plant-based alternatives.

Alongside the desserts range, this year Deliciously Ella has launched a new everyday breakfast and four new sweet and savoury snacking products.

Source
¹ Dunnhumby, 52 w/e 12.07.20

Add some deliciousness to your freezer aisle



81% of sales incremental to the frozen vegetarian category*

PLANT-BASED INDULGENCE
 GLUTEN FREE • VEGAN FRIENDLY

Email sales@deliciouslyella.com to stock up now

*dunnhumby 26we12.07.2020

Greenyard Frozen UK

On-trend in the frozen aisle

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KEY BRANDS

Greenyard Frozen

“Here at Greenyard Frozen we strive to be innovative and first to market,” says Brendan Legrove, commercial director for the company. “We work hard with our trade partners to ensure that their brands and products are top of mind, and that the frozen aisle always has something new to offer shoppers.”

The company’s mission “to make lives healthier by helping people enjoy fruit and vegetables at any moment, easy, fast and pleasurable, while fostering nature”, embodies its desire to get fruit and veg to the front of shoppers’ minds, explains Legrove. “We believe that, through market data and shopper understanding, we can produce products that are not only healthy but on-trend,” he says. “Category marketing, NPD and the sales team work closely together. This ensures that all new products have market backing, are trend-led and commercially sound.”

GREENYARD



Rise in Middle Eastern cuisine

There has been a big increase in Middle Eastern cuisine of late, he reveals, so the company is looking to bring this into the frozen category. “The range will offer shoppers an easy way into the Middle Eastern trend, by showcasing all that this flavourful cuisine has to offer while being fast and simple to cook,” he says.

“Our mission is to make lives healthier by helping people enjoy fruit and veg at any moment”



Middle Eastern INNOVATION in Frozen!

itsu

Restaurant quality wins

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KEY BRANDS

itsu

“Where previously a lack of innovation gave the frozen category a poor reputation, it has now become a destination for shoppers looking for exciting new cuisines to try, in convenient formats, that do not compromise on quality,” says Georgina Bolton Carter, brand manager at Itsu [grocery].

“The Covid-19 crisis has caused a surge in sales within frozen and Itsu is growing significantly ahead of the wider category at +135% year on year (YoY),” she says. “This has been driven largely by the ever-increasing trend of consumers looking to replicate the much-missed restaurant experience at home, a trend that 89%² of the UK has vowed to continue.

“Where people might now have more time to make a lasagne from scratch, they’re still reliant on brands such as Itsu to create the more complex products, such as bao’buns and gyoza, that can be ready in minutes. In fact, searches for Japanese food in supermarkets increased by 53% at the start of lockdown³.”

New innovations

2020 has seen some exciting new launches into frozen, as Itsu continued to grow its best-selling gyoza and bao’bun supermarket range, explains Bolton Carter.

In May, while the UK spent more time in the kitchen than ever before, the brand launched teriyaki chicken bao’buns and Korean BBQ beef gyoza, with both delivering strong incremental sales.

More recently, in response to an overwhelming demand from consumers looking for more plant-based options, Itsu has been preparing for the launch of the first vegan meat gyoza; teriyaki chick’n vegan gyoza, launching this month.

“It’s an exciting time to be launching innovative vegan products as the category has seen a new wave of customers, with 86%⁴ of plant-based meals now eaten by non-vegans,” she says. “The new teriyaki chick’n vegan gyoza has a meat-like texture, that’s juicy and full of flavour; the perfect



“Searches for Japanese food in supermarkets increased by 53% at the start of lockdown³”

nutritious substitute for those looking to reduce their meat intake, or for families looking for meat-free Monday options.

The launch is being supported with a 360-degree campaign, including print advertising, targeted digital, PR and at-shelf media.”

Commenting further on the launch, Bolton Carter adds: “We are excited to bring yet more innovation to the frozen category. We know how popular our gyozas are with consumers, as they consistently outperform other frozen ready meals in supermarket freezers. We are confident this will translate into strong sales in the frozen meat-free fixture.”

Four packs sold every minute

As the number one seller of gyoza in the UK, with 87% of the market share⁵, Itsu has redefined the way the nation eats gyoza, she notes. “Selling four packs every minute⁶, it is clear the dumplings are no longer considered just a starter or a side dish, but a mainstream freezer must-have,” she says.

“As the trend of replicating well-loved restaurant dishes at home looks set to continue in the current Covid-19 climate, the success of Itsu’s innovative range makes it an absolute must-stock for any retailer.”

Source

¹ itsu sales out data, 52 w/e 05.07.20 vs previous 52 weeks

² One Poll survey 2020

³ Waitrose Report: https://waitrose.pressarea.com/pressrelease/details/78/NEWS_13/12289

⁴ A survey of 2,100 shoppers by Harris Interactive, The Grocer, March 2020

⁵ IRI, UK value sales MAT to 01.12.19

GO GYOZA

itsu frozen gyoza +104% growth YoY*



introducing the new plant based dumpling
in supermarket freezers now

*EPOS data 52 weeks to 05.07.20 vs PY



McCain

A healthier option in chips

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McCain Naked Oven Chips
McCain Home Chips
McCain Crispy French Fries
McCain Jacket Potatoes
McCain Roast Potatoes
McCain Sweet Potato Fries
McCain Skin on Fries
McCain Gastro Chips

➔ A key product range for McCain is its chips and fries, which come in a variety of cut-types and flavours, from Crispy French Fries to The Nation's Favourite – Home Chips.

Offering a versatile and easy-to-cook product that can be enjoyed during a variety of meal occasions, McCain chips and fries help drive growth in the frozen potato category and play a key role in bringing people together at family mealtimes.

As a brand leader with over 50 years' experience McCain commands a value share of 64%¹ and a volume share of 49%¹ of the chips & fries category, which is currently worth £475m¹, reveals the company.

McCain maintains that its leadership in both retail and foodservice allows the brand to gain cross-channel insight into what consumers are enjoying in and out of home, enabling it to offer the best products to suit each meal occasion.

This insight allows McCain to not only drive penetration in the fries and chips category, but to keep producing high-quality chips and fries, which meet the latest consumer trends and taste delicious, it says.

Launch of Naked Oven Chips

In April 2020, McCain launched Naked Oven Chips – a rebrand of its Original Oven Chips – with a new name and design that aims to encourage consumers looking for healthier frozen products to consider frozen chips, says the company.

Naked Oven Chips are made from two simple ingredients – potatoes and sunflower oil – and offer a vegan and gluten-free chip, that can be enjoyed by everyone, explains the company.

“The product allows consumers who follow a healthy lifestyle to easily identify that this range is relevant to them and can be enjoyed as part of a healthy, balanced diet,” adds McCain. “Since launch, Naked Oven Chips has attracted new, younger shoppers to the category.”

McCain marketing director Mark Hodge says: “Naked Oven Chips is an exciting relaunch for us as we were



“Consumers are now looking for more choice in frozen foods, and this allows us to offer a product to more health-conscious eaters”

able to reposition our Original Oven Chips as a modern and healthier option that is attractive to shoppers.

“The product taps into the long-term growth of simple foods made from natural ingredients that shoppers can feel good about choosing and, in return, drive growth in the category.”

Attracting the health-conscious

“We know that consumers are now looking for more choice in frozen foods and Naked Oven Chips allows us to offer a delicious product to an audience of more health-conscious eaters,” comments Hodge.

“This will also attract shoppers who may not have previously shopped in the frozen potato category because they weren't aware that there were healthier choices available.”

Naked Oven Chips are available in major supermarkets, convenience and independent stores with an RRP of £1.79 for the 900g bag and £2.79 for the 1.7kg version.



FEEL GOOD FOOD
POTATO, SUNFLOWER OIL AND TASTY PROFITS

Quorn Foods

Driving meat-free in frozen

DETAILS

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KEY PRODUCTS

Quorn Mince
Quorn Crispy Nuggets
Quorn Sausages
Quorn Pieces

Quorn, the UK's No. 1 meat-free brand, with sales in excess of £203m¹ has big ambitions to help reduce the impact that our diets have on the planet and our health.

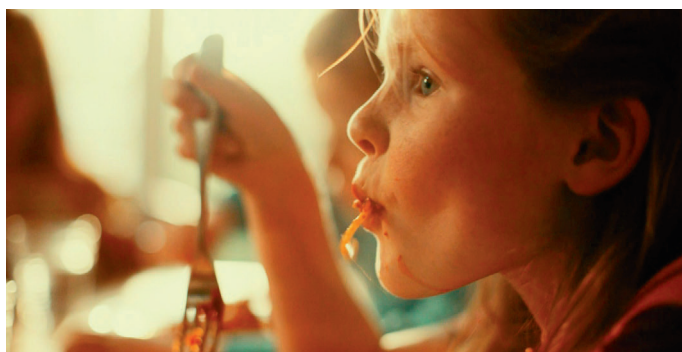
“Quorn’s iconic orange branding has become synonymous with sustainable eating, and serves as a signpost for meat-free within the frozen category,” says Gill Riley, marketing director at Quorn Foods. “Our mission is to help shoppers understand the environmental impact of our food choices and how easy it can be to take action.”

Frozen is leading the way within the meat-free category, with sales of more than £257m². With many households cooking more than ever before during the Covid-19 pandemic, there has been an accelerated demand for quick, healthy and sustainable meal options suitable for the whole family, says Riley.

“We saw a significant increase in frozen sales, up 60% at its peak³, and we also saw an uplift in Quorn’s bigger frozen pack sizes⁴, most notably Quorn Mince, Pieces (500g) and Nuggets (476g), as shoppers looked to fill their freezers and cover several weekly meals,” she adds.

Quorn Mince continues to be one of the brand’s best-selling frozen products, worth £25.2m and growing at 13.4% YoY⁴. The brand will soon be back on TV from 17 November, benefiting from a three-week campaign that further highlights just how easy it is to make the switch to Quorn Mince for family favourite evening meals, and the difference this could make to the UK’s carbon footprint, reveals Riley.

“The activity forms part of the brand’s trail-blazing ‘Step in the Right Direction’ campaign, which aims to show shoppers how Quorn is making



“Frozen is leading the way in the meat-free category, with sales of more than £257m²”

it easier than ever to make more sustainable food choices,” she says.

Earlier this year, Quorn also became the first major meat-free brand to roll out carbon labelling on its packs, now on 37 frozen SKUs, helping shoppers to make informed decisions at the point of purchase. “We should all be eating less meat for our future health and the health of our planet. By swapping one meal from beef to Quorn Mince, you can save greenhouse gas emissions equivalent to charging your phone for two years⁵ and Quorn Spaghetti Bolognese has 90% less saturated fat than a beef version⁶,” adds Riley.

“We also recently relaunched one of our most popular frozen SKUs, Quorn Swedish Style Balls, which were temporarily removed last year. Balls are the fastest-growing type of ingredient in a sector, worth £57m and growing at 15% YoY⁷, presenting an opportunity for retailers to grow sales even further.”

Sources

- 1 IRI & Kantar Combined Market, Total Chilled & Frozen Meat Free, 52wks YoY, 20.06.20 and 14.06.20
- 2 IRI 52 w/e 22.03.20/Kantar Worldpanel 52 w/e 22.03.20
- 3 IRI weekly data to w/e 25.04.20
- 4 IRI & Kantar Combined Market, Frozen Quorn Mince, 52wks YoY, 15.08.20 and 09.08.20
- 5 Carbon Trust (2014): ‘Quorn, Beef and Chicken Footprints’, Internal Report
Phone Charging from Forbes.com: www.forbes.com/sites/christopherhelman/2013/09/07/how-much-energy-does-your-iphone-and-other-devices-use-and-what-to-do-about-it/#7a049ac1228e
- 6 McCance and Widdowson (2019) – www.gov.uk/government/publications/composition-of-foods-integrated-dataset-covid
- 7 IRI 52 w/e 25.05.20 vs. previous year



**BACK
ON TV
STOCK UP
NOW**



**TAKE A
STEP**

**IN THE RIGHT
DIRECTION**

Quorn Mince. Awarded Carbon Reduction Footprint certification by the Carbon Trust for the full lifecycle of the product. See Quorn.co.uk/TV for details. Quorn® and the Quorn Logo are trademarks of Marlow Foods Ltd.

Whitby Seafoods

Catching scampi shoppers

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KEY BRANDS

Whitby Seafoods

↙ In the chilly aisles of the frozen sector, a quiet revolution has been taking place, with ambitious and talented supermarket category teams joining forces with challenger brands such as Whitby, to focus on bringing a new generation of shoppers to a love and appreciation of all things frozen.

To the previously uninitiated, the Whitby brand was “a breath of fresh air”, says Whitby Seafoods, a family-run business, established by Graham Whittle in 1985.

Now a proud, independent family business, Whitby says its hand-illustrated packs and distinctive brand image have disrupted the frozen fixture. Based in the Yorkshire fishing town of Whitby, a place with British fishing provenance, the brand appeals to the shopper for whom British cues are of increasing importance, it maintains.

Whitby Seafoods is a scampi specialist with an unapologetic love and enthusiasm for frozen scampi, claiming Whitby to be the ‘home of scampi’. This focus has brought key insights less obvious to other scampi brands that sell hundreds of products across numerous categories, it says.

Whitby Seafoods recognised the ubiquitous small bags of scampi were not suitable for the family shopper, so was the first to launch a family pack of 400g Whitby Scampi in retail, which is now the fastest-growing single scampi SKU¹ across brand and own-label in the whole category, across all retailers.

Recent Kantar data¹ show that the Whitby brand has been essential to recent frozen seafood category growth. Indeed, Whitby brought more new shoppers to the frozen scampi category than any other seafood brand over the last 12 months¹, says the company.

Whitby’s brand performance has seen 53% more households buying into the brand, driving a whopping £8m¹ of value growth this year. This is a 60% growth in value and 57% in volume¹.

This growth has been great for the scampi category, which is up £11m to a total category value of £69m¹.

Despite this success, Whitby Seafoods sales and marketing director Laura Whittle says there is much



“Scampi is woefully under-merchandised with few retailers carrying a range large enough to make the category visible in-store”

more for the category and the brand to achieve: “The retail frozen scampi category overall is now worth just shy of £70m and, for the first time, is being shopped across the generations with families driving 28% of growth².”

“However scampi is woefully under-merchandised with few retailers carrying a range large enough to make the category visible in-store. This is the biggest barrier to growth as scampi is an impulse purchase less often on shopping lists. With an average price per kilo of £8, this is a highly profitable opportunity for retailers.

“The Whitby brand has a key role in making scampi more visible and our new family orientated Whitby Scampi products appeal to the newly recruited younger frozen shoppers, who are more willing to try new ideas for an easy teatime, while loving the British seaside nostalgia captured in our brand.”

Whitby Seafoods is supporting its family of products with a high-profile national TV advertising campaign due to launch in spring 2021. Whittle says: “Our target market for this campaign is families with kids. A large percentage of this demographic will see our adverts multiple times across the campaign.”

Source

¹ Kantar Worldpanel, Whitby Seafoods Scampi KPIs, 52 w/e 08.08.20

² Kantar Worldpanel, Scampi Demographics, 52 w/e 08.08.20

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FREEZER AISLE

WHO IS THE FASTEST GROWING SCAMPI BRAND?



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1 Million NEW scampi shoppers, worth £3.8m to the category

Adding more NEW shoppers to the Scampi category than any other brand

Drop us a line at hello@whitby-seafoods.com

WHITBY
BLOOMIN' SPECIAL
Seafoods

Source: Kantar Worldpanel, Whitby Seafoods Scampi KPIs, 52 w/e 9th August 2020

Young's Seafood

Leading the way in seafood

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KEY BRANDS

Young's
Gastro
Chip Shop

Young's Seafood has emphasised its place as home to Britain's "favourite frozen fish brands" as Chip Shop and Gastro sales soared during 2020¹. And true to form, the UK's largest seafood specialist reinforced its commitments to sustainability and Fish for Life principles by reducing packaging and waste along the way.

Chip Shop, with its patented bubbly batter, strengthened its position as the leading battered fish brand and was enjoyed by an additional 200,000 shoppers², with 6.5m consumers buying a Chip Shop product in the last year. The innovative Chip Shop Lighter, which was launched in spring, comes with 45% less saturated fat, and has helped towards an 18% year-on-year (YOY) growth in the brand, now valued at £50m sales¹.

Young's Gastro has also achieved record sales of £73m, +17% YOY³, with its promise of "restaurant-quality fish at home". It adds: "As the leading premium fish brand in the category for 10 years, 6.3m shoppers bought a Gastro product in the last year²."

In addition, as it approaches the 75th anniversary since inventing scampi, Young's has seen extraordinary levels of demand thanks to its expanded range and innovation, including Popcorn Scampi Bites. This year, this longstanding British dish has reached sales of £33.1m, up 24%¹.

This success has been underpinned by Young's brand new movie-inspired 'Masters of Fish' TV campaign. Celebrating 200 years of expertise and inspiring people to cook and enjoy fish more often, Masters of Fish was launched in January 2020.

The heavyweight campaign was



“Young's Chip Shop and Simply Breaded packs will be reduced in size, saving more than 170 tonnes of unnecessary packaging annually”

viewed by 40m people³, showcasing the company's hero products – including Chip Shop Cod, Gastro Coated, Gastro Bakes and Gastro Scampi – as well as supporting the launch of Chip Shop Lighter. Fully integrated, the campaign also directly engaged with over 20m shoppers through digital and social activity.

Looking ahead, Young's reveals it is introducing "a striking new pack design for Chip Shop", featuring a sharper colour palette and fresh photography to attract a younger audience and bring "added warmth and foodiness" to the frozen aisle.

As part of the redesign, Young's will reduce the size of its Chip Shop and Simply Breaded packs, saving more than 170 tonnes of unnecessary packaging annually. This is part of its wider targets of making 100% of its plastic packaging recyclable, reusable or compostable by 2025.

"In what has been a record-breaking year for Young's, the UK's number one brand in seafood is proud to play its role in inspiring Britain's love of fish by providing delicious dishes for the whole family and for every meal occasion," concludes the company.

Sources

¹ IRI, EPOS data, 52 w/e 06.09.20

² Kantar, 52 w/e 06.09.20

³ BARB

£50m SALES*

BRITAIN'S FAVOURITE

GREAT
NEW LOOK



REDUCED PACKAGING
LESS WASTE
REDUCED CARBON FOOTPRINT

- 200k NEW SHOPPERS**
- +18% GROWTH*

*52 week data (Source - IRI w/e 6th Sept 2020) **52 week data (Source - Kantar w/e 6th Sept 2020)

William Reed

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