

Frozen

BE A FLAVOUR MAKER



McCain

Livening up the frozen aisle

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

Since launching over 50 years ago, McCain has gone on to be the UK's largest manufacturer of frozen potato products¹. Throughout, the brand has been committed to producing high-quality, innovative products that respond to the latest trends, which has resulted in successes for McCain over the past year, says the company.

McCain has a value share of 45.2% and a 33.6% volume share in the frozen potato category². Being a leader in both retail and foodservice allows it to gain cross-channel insight into what consumers are enjoying in and out of home, as well as the best products to suit each meal occasion, notes marketing director Mark Hodge. "This insight also informs new product development so the brand can stay front of mind for consumers, as well as having a strong position in the frozen aisle," he adds.

'Something Nice for Tonight'

During the pandemic, staying-in became the 'new normal', as consumers evolved their shopping habits to adapt to the new landscape. McCain notes how this shift has led to a new demographic of younger adults entering the category, as they become acquainted with the benefits and convenience of frozen food. Now restaurants and bars are open again, consumers are continuing to choose their homes as their preferred locations to host mealtimes and reconnect with loved ones.

McCain's 'Something Nice for Tonight' portfolio is designed with adults in mind, giving smaller households the opportunity to create special 'dining-in moments', while benefiting from the ease and speed of frozen meals, explains McCain. This includes McCain's Gastro Triple Cooked Chips, made from thick-cut British potatoes and prepared with 'luxury' beef dripping, offering consumers an in-home version of a classic pub favourite.

"The March release of Flavour Makers brought an exciting new offer in the range, which taps into the growing restaurant trend of fries that deliver a taste hit," comments Hodge. Customers can customise their fries with flavour



“McCain's 'Something Nice for Tonight' portfolio is designed with adults in mind, giving smaller households an opportunity to create special 'dining-in' moments while also benefiting from the ease and speed of frozen meals”

sachets in Smokey BBQ Fries, Garlic & Herb Chimichurri and Spicy Chilli Chipotle. Flavour Makers' bold tastes offer a unique proposition to the frozen chip category.

Naomi Tinkler, McCain category controller, says: "Eating-out trends have always been a source of inspiration for McCain. With the rise of customers cooking more meals in-home, they are increasingly valuing the benefits of frozen food and seeking to liven up their regular meals. So, demand for some interesting and tasty frozen potato has continued to grow. Whether it's McCain's Gastro Craft Beer Fries, Gastro Triple Cooked Chips or Flavour Makers, our 'Something Nice for Tonight' products provide consumers with that special component they are looking for and gives them a reason to continue to shop frozen. The easy-to-prepare products cater to a variety of tastes, so customers can enjoy meals together without stressing over the cooking."

With the colder months ahead and the threat of future social restrictions, McCain remains committed to innovation – demonstrated by the recent release of Gastro Craft Beer Fries – as it continues to offer consumers 'Something Nice for Tonight'.


Source
^{1,2}Kantar, WPO 12 w/e
05.09.21

Analysis



Breaking the ice

Frozen food has broken through some perception barriers, but at retail level there is still much to do

 The popularity of frozen food has gone through a transformation over the past 18-20 months, as UK consumers have come to realise the benefits it offers – among them convenience, versatility, quality and less food waste.

As shopper missions changed during the Covid-19 lockdowns and increased at-home meal occasions became the norm, demand for quick and easy-to-prepare options saw the freezer aisles in supermarkets rise to prominence. That, coupled with the search to replace restaurant-quality meals as a home luxury when people were unable to dine out, means that frozen has finally started to come into its own.

Performance

“The boom in at-home eating has changed the field for frozen,” says Gareth Roberts, head of category management (frozen) at Young’s Seafood. “We’ve seen existing shoppers broadening their basket to cater for more meal occasions at home alongside an increase of 433k (+2.2%) new shoppers¹ buying frozen fish in the last two years.”

As a category, fish has also outperformed total frozen, increasing by £182m or 18.9%² in the last year to become the fastest-growing frozen food category, meaning that it has now grown to be the second-largest frozen food sector behind ice cream and confectionery, he adds.

Contents

McCain 2
 Innovating to create ‘Something Nice for Tonight’

Analysis feature 3
 Frozen food has come increasingly into its own in the past 18-20 months, as at-home consumers appreciate its versatility, convenience and the lack of food waste. Yet there is still much work to do in retailers’ freezer aisles to maximise category opportunity, say suppliers.

Birds Eye 8
 Taking steps to ensure a positive choice for consumers and the planet

Dr. Oetker 10
 Broadening its pizza range to cater to all dietary choices

Norwegian Seafood Council 12
 Promoting sustainable frozen fish and seafood as part of a healthy diet

Quorn Foods 14
 Offering quick, tasty and sustainable meat-free solutions

Whitby Seafoods 16
 Breathing fresh air into the frozen category with its scampi

Young’s Seafood 18
 Seeing rapid growth as consumers fall in love with the freezer

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Analysis

While there are new shoppers looking to cater for wider meal occasions, including lunchtime and more casual dining options, the growth has predominantly been driven by existing shoppers broadening their repertoire and frequency of purchase, he notes.

Hans Frode Kielland Asmyhr, UK director for the Norwegian Seafood Council (NSC), says penetration for the whole frozen category has now reached 87% of the population³, driven by consumers stocking up their freezers in preparation for lockdowns. The business' frozen seafood experienced a 16% increase in value and 10.4% in volume⁴, he says. "Throughout the pandemic, trolley size and the number of items bought increased per visit⁵, even though frequency of store visits decreased, which drove penetration across categories including seafood. Due to the high quality of Norwegian caught cod and haddock and the convenient nature of frozen.... we have been able to drive loyalty and repeat purchase."

At Birds Eye, marketing director Sarah Koppens says: "People are actively incorporating more frozen products into their meals, which is keeping demand high. Latest performance data from Kantar on the total market spend shows the frozen sector up 1.9% in the latest 12 weeks, continuing to perform ahead of total store⁶."

To understand the shift in consumers' purchasing habits, Birds Eye undertook research which identified that 72% of parents are choosing frozen options to put on their children's plates at dinner time⁷. "This gives us confidence that this ongoing change in perception of frozen food is here for the long term," adds Koppens.

At McCain, category controller Naomi Tinkler comments: "Providing more meals in home every week meant shoppers needed to provision their home for more occasions, while health concerns limited the number of shopping trips consumers wanted to make. Many discovered the benefits of frozen food as it's easy to store, easy to cook with little wastage, and they were impressed by the quality, taste and variety of choices available. Some of those new experiences will have become entrenched in family eating routines."

Meanwhile, following a strong 2020, the frozen meat-free category continues to grow, currently up



3.3% year-on-year⁸, says Gill Riley, marketing director at Quorn Foods UK. Quorn Mince continues to be one of the brand's best-selling frozen product, worth £24.1m⁸, she says. "There has been higher demand within ingredients sectors across food categories as people have had more time to take to scratch cooking more often and the frozen category has also seen the benefit of this trend. Shoppers are seeking quick, healthy and sustainable meal options that are suitable for the whole family."

The gastro experience

Throughout the pandemic, there has been strong demand for out-of-home (OOH) flavours in the home as consumers look to create 'special' mealtime occasions in their own kitchens, to satisfy cravings for meals they would typically enjoy in pubs and

restaurants, notes McCain's Tinkler. "McCain's 'Something for Tonight' range provides consumers with that special component they are looking to add to their nights in. The demand has been demonstrated by the continued growth of Gastro Triple Cooked Chips, with strong sales over the last year and a value growth of 21%⁹."

Frozen pizza was one of the home luxuries that consumers sought when they could not dine out and are still proving popular, reveals Birds Eye's Koppens. "We're currently seeing the eat-at-home takeaway-style pizza category growing in volume vs last year, up 4.9%¹⁰," she says. She notes that, in the last year, the company's Goodfella's pizza range has seen volume growth of 10.7%, with the takeaway sub-category outperforming the sub-category in value (+15.6%) and



Health and youth focus for NPD

“Flexitarian, vegan and vegetarian diets are all on the rise, with it predicted that 13 million Brits will live a meat-free lifestyle by the end of 2021ⁱ,” says Birds Eye marketing director Sarah Koppens. The company’s Green Cuisine range is now worth £19mⁱⁱ, having only launched in March 2019 and it has expanded the line-up most recently with the introduction of Fishless Fingers into Sainsbury’s in June. The company has also introduced a Gluten-Free Cheesy Garlic Bread to its Goodfella’s pizza range, expanding dietary choices.

Quorn is encouraging children to take an “early transition into meat-free” with the launch of Roarsomes in the frozen category earlier this year. The dinosaur-shaped vegan nuggets with crunchy breadcrumb coating have been supported by a multi-channel marketing push through September and October, reports marketing

director Gill Riley, who says value sales reached over £500,000 just three months after launchingⁱⁱⁱ.

Family shoppers and young adults are also in the sights of Whitby Seafoods, which says these groups are not as well represented in fish. The company teases that it is “planning some top secret seasonal activity to broaden the appeal and times that scampi is enjoyed by the family”.

Young’s Seafood notes that 72% of households are looking for more meal inspirations using seafood^{iv}, so a key focus is engaging both new and existing customers through NPD. It has a new children’s range with Annabel Karmel, featuring Cheesy Fish Pie and Chip Shapes designed for children under the age of five, which it hopes will help to inspire the next generation to love fish, says head of category management (frozen) Gareth Roberts.

Focusing on health &

permissibility, Dr Oetker has launched a new range of frozen pizzas under The Good Baker brand, fully vegetarian, featuring crusts with added grains and seeds and packed in a fully recyclable FSC-certified card box. “The range is designed to attract younger shoppers to frozen pizza, who traditionally buy into the category less frequently due to health, quality and sustainability concerns,” says head of marketing for pizza Paula Wyatt.

At McCain, the NPD focus has been fixed on the recent lack of hospitality and dining out. “Money that would typically have been spent on eating out is now being channelled towards premium own-brand labels and making mealtime moments at home feel more ‘special’,” says category controller Naomi Tinkler. In March it released a new range of fries called Flavour Makers, allowing shoppers to customise their fries via flavour sachets.

volume (+28%) in the last 12 weeks¹⁰. Meanwhile the company’s Stonebaked Thin range has seen value growth of 7.2%¹¹ over the last year in a competitive market “so we’re confident the restaurant-quality trend is here to stay”.

Staying at home for long periods in 2020 fuelled high growth in frozen pizza, with the category up 12% year-on-year to £477m¹², reveals Paula Wyatt, head of marketing for pizza at Dr Oetker. The challenge has been to overlap such a strong year, she notes, but adds that some new shoppers brought in during 2020 have been retained in the category. “There are about 500k more households buying frozen pizza than two years ago¹³,” she says.

Within that trend, dietary and lifestyle has been one of the fastest-growing sectors in frozen pizza with vegan pizza doing particularly well

(£23.6m D&L growth +19.1%, vegan pizza +43%)¹⁴. So, delivering on health and permissibility is a focus area for the company. “We are making great progress in catering for all dietary choices with the expansion in vegan and gluten-free offerings, but there is still work to do to make pizza a more permissible category,” adds Wyatt.

“Variety is always a winner for shoppers and we’re seeing more innovation in the frozen seafood category, with more luxurious ready-to-go ‘gastro’ ranges available alongside traditional breaded options,” says NSC’s Kielland Asmyhr. “Shoppers are starting to accept that frozen seafood is on a par with fresh when it comes to quality.

Sustainability

Consumers’ increased focus on sustainability is very much on the

minds of frozen food suppliers, who point to the lack of waste their products help to ensure.

Fish and seafood firms are keen to promote the sustainable provenance of their brands, with Whitby Seafoods noting that all its scampi is caught in the waters around the British Isles and that its managing director Daniel Whittle, chairs the Project UK Nephrops, which is working towards an environmentally sustainable future for UK fisheries through the implementation of credible fishery improvement projects. “The ambition is to have all our scampi from an MSC-certified fishery... so it can be enjoyed for generations to come,” it says.

NSC’s Kielland Asmyhr says the recent Seaspiracy documentary “sought to reveal the entire [fishing] industry’s practices as unethical and

Analysis

bad for the environment”, but adds that it failed to acknowledge that responsible fisheries and aquaculture do exist and that its message to give up seafood altogether was “flawed and based on inaccurate information and an incomplete picture of the industry”.

He notes that a 2019 United Nations report concluded that, managed sustainably, our oceans “could provide over six times more food than they do today: a powerful message for a growing population”.

Birds Eye, meanwhile, says its fish portfolio is 100% MSC-certified and it is working continually to ensure it remains responsibly sourced. It is also among several companies looking to reduce packaging, with an ambition to make its entire portfolio 100% recyclable by the end of 2022. Meanwhile, both Young’s Seafood and Quorn Foods are working towards having 100% of their packaging reusable, recyclable and compostable by 2025. And Quorn Foods’ ambition is to be a net positive business by 2030, having already switched to renewable electricity at all of its manufacturing sites.

Disrupting the frozen aisle

In terms of frozen aisles in retail stores, however, not much seems to have changed, apart from the contents being somewhat more diverse and extensive than previously. The aisles themselves still tend to be at the opposite end of the store from the entrance, and suppliers are of the opinion that retailers need to embrace a shift in attitude towards the frozen aisle, to reflect the obviously increased shopper interest.

“There has been a very traditional approach to the merchandising of frozen food over the years, with in-aisle core ranges, and end display [used] for deep cut promotional activity,” says Dr Oetker’s Wyatt. “With the impending HFSS restrictions, innovating in both aisles and feature space will be critical. Creating events, discovering ‘new’ and innovation, and suggesting meal ideas are all areas that can be improved in frozen food.”

“Shopper interaction is usually shorter in the freezer section, so we have less time to grab the attention of consumers,” says NSC’s Kielland Asmyhr. “The physical barrier of a freezer door can have an impact, too. Consumers generally need more



guidance when in the frozen section via more in-depth communication, showcasing, for instance, what is in the freezer and how each of the products differ. To address this, we’ve been taking steps to add clear original labelling across our supply chain.”

“Creating interest in-store is important to every category and frozen food is no exception,” says McCain’s Tinkler. “Well-blocked and signposted aisles, cleanly merchandised promotions with great activation are important. Favourite, indulgent or new products are great ways of tempting shoppers on ends to make an incremental purchase or eye-catching activation can either direct shoppers to a category or lure them into an aisle.

“Retailers should help shoppers navigate between sections by creating a visual ‘block’ of food and brand

categories. They should also use colour blocking on shelves and in freezer space to help shoppers clearly identify brands and attract the eye of browsers.”

Retailers should always strive to find ways to grab the attention of shoppers in order to encourage additional purchases, says Kate Forbes, category director at Birds Eye. “This is especially important for categories such as frozen food, that don’t always have the gift of shoppers’ ‘dwell time’ as the freezer aisle is often less comfortable for them.”

Given the location of freezer aisles in-store, shoppers tend to go there for a specific purpose and towards the end of their shopping trip, after which they are keen to get their frozen purchases home quickly, adds Forbes. “So, as a category frozen relies upon brands working alongside retailers to find new ways of disrupting shoppers’ journeys and

Driving the message in e-commerce



Ninety per cent of current online grocery shoppers plan to keep shopping for their groceries online once the peak of Covid-19 passes, according to recent statistics from Mintel^a. Three in five Brits (59%) are online grocery shoppers, up from 50% in 2019^a and Mintel forecasts that they will spend £19.4bn on online grocery shopping this year^a.

With supermarkets and convenience stores ramping up their delivery services, the frozen category is one that has seen direct benefits, say suppliers.

“Frozen is one of the top five categories that’s bought online^b, and this has been particularly evident over the last year,” says Chris Knowles, head of e-commerce at Birds Eye. “One of the many knock-on effects from the pandemic has been the accelerated adoption of e-commerce, with a 3.2% rise in the online share of frozen sales

during 2020 compared to 2019^c. In fact, in the first quarter of 2021 alone, we’ve seen 70% of online grocery shops acting as the consumers’ main shop^d.

“With over half of frozen shoppers (55%) preferring to buy online^e, we are in a strong position to support this growing channel. We’re identifying ways to drive frozen penetration online and gain a clear picture of how we can optimise online investment to drive an even stronger performance, moving forwards.”

“The boom in online shopping has meant a quarter of Young’s sales are now going through online,” reveals Gareth Roberts, head of category management (frozen). “This shift has allowed more people to enjoy the value of frozen fish without some traditional barriers in place, such as hesitancy to transport it home because of the fear of defrosting.”

Whitby Seafoods says

it has seen “a massive growth in e-commerce sales in 2020/21 of 84.2% in value and 76.9% in volume, while attracting 200,000 new shoppers to this platform over the last 52 weeks^f”.

“E-commerce will always be an important part of the market for consumers who find visiting stores difficult or have busy lives, whether that be families looking after children or adults with busy jobs – or simply those who enjoy comparing prices,” notes the company.

“E-commerce is certainly a growth channel and we believe that growth will continue, perhaps not at the large numbers we have seen during Covid,” says Paula Wyatt, head of marketing for pizza at Dr Oetker. “With the explosion in shorter delivery windows and a plethora of delivery platforms opening up the convenience sector, there is still a large amount of growth to come.”

opening up new sales opportunities.”

In the run-up to Christmas last year, the Aunt Bessie’s and Birds Eye brands teamed up with Asda to deliver “an eye-catching, theatre-style aisle takeover” across 10 stores, says Forbes. “This style of engagement was then recreated during the summer, when Birds Eye Green Cuisine became the official plant-based supporter of Team GB in the 2020 Tokyo Olympics, with extensive POS activated in 20 Asda stores.”

The aim, she says was to create an improved customer experience that reinvented the freezer aisle as an engaging and interactive destination. “Even though the freezer sections of stores typically haven’t changed dramatically over the past 10 years, we plan to continue disrupting the market in-store, as the sustainability benefits that frozen food offers present a good

opportunity to communicate as loud and proud as possible with shoppers.”

However, the freezer has become “a positive destination in-store” as new shoppers have had increased exposure, awareness and encouragement to visit the frozen area, says Whitby Seafoods. “People are beginning to expect more from the freezer aisle in terms of NPDP, excitement and value for money. There are new shoppers coming into frozen scampi and other seafoods who have different needs than the established shopper. This younger audience is more likely to pick up a challenger brand, is more quality orientated and is often feeding a family,” it adds.

“Retailers that have trimmed down frozen fish space and choice in the last few months to reduce inventory have seen rapid decline in their share of the category. To retain the new shoppers,

frozen needs to be innovative, exciting and have as much choice and provenance as fresh and ambient.”

Sources

- ¹ Kantar, June 2021
 - ² Kantar, December 2020
 - ³ Nielsen Homescan, October 2020
 - ⁴ Nielsen, MAT to October 2020
 - ⁵ Kantar, September 2021
 - ⁶ Kantar, L12 weeks, w/e 11.09.21. Ambient -1.9%, Fresh & Chilled -1.2%, Household -3.6%, Total store -2.7%
 - ⁷ Censuswide study of 2,023 parents between 16.07.21 and 21.07.21. Censuswide abides by and employs members of the Market Research Society, which is based on the ESOMAR principles
 - ⁸ IRI, Total Meat Free/Chilled/Frozen (as appropriate), 52 w/e 14.08.21 & Kantar, 52 w/e 08.08.21 (vs prior year for YOY % change)
 - ⁹ Kantar, WPO, 12 w/e 05.09.21
 - ¹⁰ Nielsen data, Total Coverage, Volume Sales, Total frozen takeaway pizzas, MAT L52 w/e 11.09.21
 - ¹¹ Nielsen date, Total Coverage, Value Sales, MAT L52 w/e 11.09.21
 - ¹²⁻¹⁴ IRI, Frozen Pizza, Total Market, 52 w/e 11.09.21
- ## NPD boxout
- ¹ <https://tinyurl.com/c7w3b6j3>
 - ² Nielsen data, Total Coverage, L52wks, w/e 11.09.21
 - ³ Combined retailer Epos data to 11.07.21
 - ⁴ Kantar, June 2021
- ## E-commerce boxout
- ¹ <https://tinyurl.com/nhfv2d7m>
 - ² IGD ShopperVista, online grocery shoppers, October '18
 - ³ Kantar WPO, Total Frozen Data to 05.09.21
 - ⁴ IGD ShopperVista, quarterly channel trends, April 2021
 - ⁵ See b
 - ⁶ Kantar Worldpanel, Whitby Seafoods, Frozen Scampi KPIs 52 w/e 11.07.21

Birds Eye

Sustainability to the fore

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Aunt Bessie's
Goodfella's

Every day, millions of households enjoy products from Birds Eye, Aunt Bessie's and Goodfella's so it's no surprise that these brands are taking the right steps to ensuring their products are a positive choice for both consumers and the planet.

The majority of shoppers (62%) are now influenced in their food and drink purchases by sustainability issues¹ and frozen food offers excellent value as a healthy, sustainable and convenient meal option that also helps to reduce food waste, says Sarah Koppens, marketing director at Birds Eye. "Sustainability is very much front of mind for UK consumers and a key priority for us as a company," she says.

"As part of Nomad Foods, we've signed up to the Race to Zero initiative and are on track to move to 100% renewable electricity across all our UK factories by the end of October 2021. We're empowering consumers to make more environmentally-friendly food choices with our growing plant-based range, Green Cuisine, as well as entering meaningful and action-led partnerships, such as with the World Wildlife Fund this year, in support of sustainable sourcing and biodiversity."

Sustainable sourcing

Birds Eye is committed to responsibly sourcing ingredients across its portfolio. By working closely with the Marine Stewardship Council for over 20 years, it has achieved a 100% MSC-certified fish range and is working to ensure it remains at this level.

Koppens adds: "We are proud to be open with our shoppers about how and



“Reducing food waste is an area we’re extremely passionate about, as it’s already a fundamental benefit of frozen food”

where we responsibly source our fish. The new packaging design launched across our fish range earlier this year highlights our commitment to transparency. Using a QR code on the new packs, shoppers can trace the origin of the fish as part of our Fish Tracker tool.

"We're also working to ensure the ingredients in our vegetable and potato ranges are grown in accordance with sustainable farming practices. In 2020, our pea grower cooperative became the first UK farm management group, and the first globally in frozen food, to be awarded the Sustainable Agriculture Initiative Platform's Farm Sustainability Assessment Gold level.

Food waste

"We're extremely passionate about reducing food waste – already a fundamental benefit of frozen food – with a target to cut food loss and waste in half by 2030 across our supply chain. While ambitious, we're already making great progress – recently winning The Marketing Society Sustainability Award 2021 for our Food Waste Campaign."



Source

¹ Hearts & Science and YouGov survey, 2,000 UK adults, July 2021: <https://yougov.co.uk/topics/resources/articles-reports/2021/07/21/eco-credentials-impact-purchase-choices>

WE ARE WORKING TOWARDS A FUTURE WHERE BOTH PEOPLE & THE PLANET CAN THRIVE.



Sourcing our fish responsibly with 100% of our UK portfolio MSC certified.

Working hard to meet our ambitious packaging commitment to be 100% recyclable by the end of 2022.

Over 80% of our UK portfolio is currently a healthier meal choice (non-High Fat Salt Sugar).



Dr. Oetker (UK)

Innovation leads pizza growth

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The Good Baker

↙ The frozen pizza market is now worth over £464.5m¹, a slight decrease (-3.4%) year on year, but a marked increase from 2019, fuelled in part by people staying home for long periods of time in 2020, says Dr Oetker.

“The challenge this year has been to retain customers and it’s encouraging to see that new shoppers brought in during 2020 have remained in the category as they realise the wider benefits of frozen food – there are about 500k more households buying frozen pizza than two years ago,” it says. “Chicago Town keeps its crown as the UK’s leading frozen pizza brand, now worth £133m². While Deep Dish continues to be a valuable Chicago Town format, a range that’s seen particularly high performance within the sector is Chicago Town Takeaway, now worth over £61.1m³. Our stuffed crust, large sharing pizza, targets the weekend social pizza occasion and offers consumers the takeaway experience at home with its fresh rising dough and competes head-to-head with the high street in terms of quality, range and offer – driving incremental spend for frozen.

“Another success story and packed with taste is our Chicago Town Tiger Crust range which has seen excellent growth, up nearly 33% year on year⁴,” says the company.

Dr Oetker is continuing to invest heavily in its Chicago Town brand. “Kicking off in late October 2021, we’re extending into out-of-home formats to increase the reach and the impact of our existing masterbrand campaign; £2.5m will be spent to deliver high reach with TV, bus supers, rail transitions, fly posting and mainline London train station takeovers.”

In addition, health and permissibility



“We’re making great progress in catering for all dietary choices, with our expansion in vegan and gluten-free offerings, but there’s still work to do to make pizza a more permissible category”

are key focus areas for Dr Oetker in frozen pizza, it explains. “We’re making great progress in catering for all dietary choices with our expansion in vegan and gluten-free offerings, but there’s still work to do make pizza a more permissible category.”

Earlier this year Dr. Oetker Ristorante launched its first vegan pizza, Ristorante Vegan Margherita Pomodori in response to UK consumer demand for plant-based frozen options that offer the same indulgence and taste as authentic Italian pizza. The Vegan Society-certified product was the first mainstream Italian pizza to join the frozen category, it says, and features a thin and crispy base.

“Our latest launch for September 2021 is a new range of frozen pizzas – The Good Baker. A great-tasting pizza, the range features unique crusts containing grains and seeds and is fully vegetarian. They are all meat-free, non-HFSS and contain 340-384 calories per half pizza. The Good Baker has fully recyclable packaging with FSC-certified card box and is designed to attract younger shoppers to frozen pizza who traditionally buy into the category less frequently due to health, quality and sustainability concerns.”



Source
¹⁻⁴ IRI, Frozen Pizza, Total Market, 52 w/e 11.09.21



PIZZA? YEAH, WE GO TO TOWN ON IT

OUR AUTUMN CAMPAIGN IS
**FULLY
LOADED**

£2.5M
NATIONAL
CAMPAIGN



READY TO SEE A LOT MORE OF THE **UK'S NO.1 FROZEN PIZZA** BRAND?
YOU'D BETTER BE 'COS FROM OCTOBER
WE'LL BE LIVE ACROSS
TV, BUS SUPERSIDES AND BILLBOARDS

Norwegian Seafood Council

Be clear on provenance

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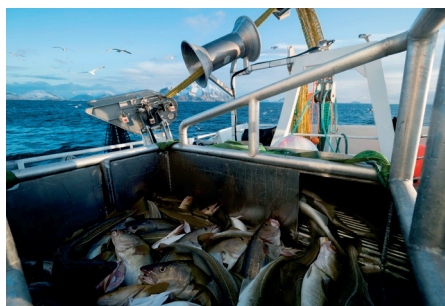
Shopper interaction tends to be shorter in the freezer section, giving frozen food businesses less time to grab the attention of buyers, says Hans Frode Kielland Asmyhr, UK director for the Norwegian Seafood Council. “However we know that consumers want high-quality fish and seafood from a clear origin, so, to address this, we’ve taken steps to add clear origin labelling across our supply chain. As well as assuring shoppers they are buying high-quality Norwegian fish, they can be reassured of its sustainability credentials, too.

“Retailers could sell more if they offered jaded shoppers mouth-watering mealtime ideas – with frozen fish as the starring role,” he says. “With health a key concern for many at the moment, there are also plenty of opportunities for retailers to promote frozen fish and seafood as part of a healthy diet.”

Correcting misinformation

Fishing has had a bad press recently, as documentaries like *Seaspiracy* have sought to reveal the entire industry’s practices as unethical and bad for the environment, notes Asmyhr. “We’re delighted that this has opened up a dialogue around food security and seafood’s role in this. However, *Seaspiracy* fails to acknowledge that responsible fisheries and aquaculture do exist. And its message – to give up seafood altogether – is flawed and based on inaccurate information and an incomplete picture of the industry.

“A United Nations report from 2019 concluded that, managed sustainably, our oceans could provide over six times more food than they do today: a powerful message for a growing global population,” he explains. “This



“Retailers could sell more if they offered jaded shoppers mouth-watering mealtime ideas, with frozen fish as the starring role”

is why it’s important that we keep the conversation open and continue to promote sustainable products and practices – ensuring that there’s a place for seafood at the table and sustaining many more generations to come.

“Given the current high levels of consumer awareness around environment and sustainability issues, retailers should also consider being more upfront about their sustainability credentials. Engaging customers on why origin matters and helping shoppers to rapidly find what they want in the freezer cabinet, through providing well-marked sections promoting sustainable options, would be another opportunity.

“Our merchandising and promotions focus mainly on communicating origin to shoppers; adding the distinctive ‘Seafood From Norway’ branding to our frozen fish and seafood sends a clear message to buyers about quality and sustainability,” he notes. “To inspire menu choices and show the versatility of Norwegian cod and haddock, we provide easy-to-follow recipes such as delicious Goan Fish Curry, which can be found on seafoodfromnorway.co.uk and across our social channels.”



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SEAFOOD
FROM
NORWAY

Quorn Foods

Quick, tasty meat-free meals

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KEY BRANDS

Quorn Mince
Quorn Crispy Nuggets
Quorn Sausages
Quorn Pieces

Quorn, the UK's No. 1 meat free brand¹, has big ambitions to reduce the impact that consumers' diets have on the planet and their health with the help of quick, tasty and sustainable meat-free solutions in the frozen category, it says.

The meat-free category is now worth £722m and growing at +13.5% YoY¹, with shoppers seeking great tasting, sustainable meal options that are suitable for the whole family. The frozen meat-free category is growing at +3.3% YoY¹, presenting an opportunity for retailers to tap into this market to meet demand and drive sales.

"We saw a significant increase in frozen sales during the UK's lockdowns, as families had more time to cook and stock up on favourites. This slowed as restrictions lifted, but there's continued interest in sustainable shopping and meal solutions that are tasty, quick and healthy," says Gill Riley, marketing director at Quorn Foods UK.

This year, Quorn has launched a range of frozen NPD to help retailers drive sales. Quorn Hot & Spicy Bites, Roarsomes and Fishless Scampi joined its best-sellers in the frozen aisle, delivering over £1.6m-worth of value sales in the last 35 weeks², reveals Riley.

Tapping into the success of meat-free breaded chicken products, Hot & Spicy Bites (465g; RRP £3.25) – fiery chicken style bites with a sriracha breadcrumb – are aimed at shoppers who are looking for a flavoursome and more sustainable meal choice.

Sales of fishless products are seeing a rise as huge numbers of consumers realise the growing demand that's being placed on the oceans and seas, accelerated by documentaries such as 'Seaspiracy'. So, Quorn's Fishless Fillets (200g; RRP £2.50), Fishless Fillets (200g; RRP £2.99), and new vegan Scampi (300g; RRP £2.50), offer alternative options for family favourite meals.

Meanwhile, Quorn Roarsomes (240g; RRP £2.20), joining Quorn's range of nuggets, was launched in April this year. Specifically aimed at encouraging children to try meat-free at mealtimes, the dinosaur-shaped vegan nugget with



“By providing families with a tasty and fun way to engage children in meat-free, we hope to inspire a long-term interest in sustainable eating”

a crunchy breadcrumb coating, is the first of its kind in the category and is currently the No. 1 frozen NPD launch³.

"Sustainability is already the key driver for younger consumers in meat-free⁴," adds Riley. "By providing families with a tasty and fun way to engage children in meat-free, we hope to inspire a long-term interest in sustainable eating. Early sales are encouraging, with the product delivering over £0.5m in value sales just three months after launch⁵.

"Quorn's iconic orange branding acts as a signpost for meat-free within the frozen category, along with the on-pack carbon labelling we're proud to display," says Riley. "We're advising retailers to stock the latest NPD alongside everyday frozen favourites, such as Quorn Mince, Sausages and Crispy Nuggets, which have all achieved 'Netmums Recommends' status⁶ and have collectively contributed almost £42m-worth of annual sales⁷."

Source

¹ IRI, Total Meat Free/Chilled/ Frozen (as appropriate), 52 w/e 14.08.21 & Kantar 52 w/e 08.08.21 (vs. prior year for YoY % Change)
² IRI, Value Sales data, 35 w/e 14.08.21
³ IRI, 12 week data to 14.08.21
⁴ YouGov 2020
⁵ Combined Retailer Epos Data to 11.07.21
⁶ 93% would recommend Quorn Sausages to a friend or family, 98% Quorn Crispy Nuggets, 91% Quorn Mince and 93% Quorn Roarsomes
⁷ IRI, Total Meat Free, Total Market, 52 w/e 22.05.21

NO. 1 MEAT FREE FROZEN NPD LAUNCH*



**STOCK UP
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MAXIMISE YOUR SALES ONE BITE AT A TIME

*IRI 12w Data to 14th August 2021.

Whitby Seafoods

Breathing fresh air into frozen

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KEY BRANDS

Whitby Seafoods

↙ The Whitby brand has been a breath of fresh air in the frozen category over the last 12 months, it says. “Certainly shoppers thought so, purchasing an additional £5m-worth of Whitby Scampi over the last 52 weeks, resulting in branded growth of 32% in value and 36% in volume¹,” reveals Whitby Seafoods sales and marketing director Laura Whittle.

The brand’s key skill, it seems, is delivering that often sought-after – and rarely delivered – virtue, snagging new category shoppers, she says. “Over 165,000 of the new shoppers picking up the Whitby brand have never bought scampi before², with reasons for not shopping the category previously ranging from ‘invisible in store’ to ‘poor value’ barriers³,” she reveals.

“The bright and bold engaging hand-drawn packs and introduction of family pack sizes have taken down those shopper barriers and opened up scampi for significant growth. Another major win on visibility was the first ever Whitby Scampi TV ad campaign on ITV and ITV2 throughout May 2021, backed up by in-store activities and end-of-aisle promotions. The advert was seen by a whopping 2 million people and resulted in positive shifts across all brand attributes, as well as raising sales by a further 20% over the campaign period⁴.

The scampi category has grown by 19.8% to a value of £80m and over 35% of that growth was driven by the Whitby brand⁵. Indeed, Whitby is the only brand growing faster than the market and therefore driving up their market share to over 23.5%, up 33% from the previous year⁶.”

Whitby is a leader in quality, having sold the flagship restaurant product Whitby Scampi for decades, says Whittle. “So, Whitby could authentically bring that elusive, and often over-claimed, restaurant quality to the frozen shelves. Indeed Whitby Scampi is eaten by more diners and shoppers than any other brand making it Britain’s favourite scampi brand⁷.

Yet, Whittle says there is still much more for the category and the brand to achieve. “For the first time, the retail frozen scampi category overall is



“The scampi category has grown by 19.8% to a value of £80m and over 35% of that growth was driven by the Whitby brand⁴”

being shopped across the generations with families making up 33% of all sales and driving 16% of growth⁸. However, scampi is woefully undermerchandised, with few retailers carrying a range large enough to make the scampi category visible in-store. This lack of visibility is the biggest barrier to growth, as scampi is an impulse purchase less often on shopping lists. With an average price per kilo of over £9, this is a highly profitable opportunity for retailers.”

Behind the scenes the brand is working hard to lead the scampi revolution on fishing, too. Whitby Seafoods managing director Daniel Whittle chairs the Project UK Nephrops working group, a collaborative partnership working towards an environmentally sustainable future for UK fisheries through the implementation of credible Fishery Improvement Projects (FIP). The Nephrops FIP Action Plan encompasses several milestones and the ambition is to have all scampi from an MSC-certified fishery by achieving these milestones.

As Daniel Whittle explains: “As the world’s largest scampi supplier, we take responsibility for the sustainability of the scampi fishery. All our scampi is caught in the waters around the British Isles, so through Project UK we can work hands-on with fishermen and suppliers to get MSC certification for all the scampi we sell – an important step for us and valued by our shoppers.”

Source

^{1,2} Kantar Worldpanel, Whitby Seafoods KPIs, Frozen Scampi, 52 w/e 11.07.21

³ Lucky Generals, Food Choices Survey, ‘Why do you not buy frozen scampi more often?’, January 2020

⁴ Kantar Worldpanel, Whitby Seafoods Frozen Scampi KPIs, 4 w/e 16.05.21

⁵ Kantar Worldpanel, Frozen Scampi, Total Market, 52 w/e 11.07.21

⁶ Kantar Worldpanel, Frozen Scampi, Brands – Share Change, 52 w/e 11.07.21

⁷ The NPD Group, Seafood Data Sheet, Q2 2021

⁸ Kantar Worldpanel, Frozen Scampi, Shopper Demographics, 52 w/e 11.07.21

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Young's Seafood

Stellar growth for Young's

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KEY BRANDS

Young's
Gastro
Chip Shop

↙ The nation has fallen in love in with the freezer, and particularly with frozen fish as it outperformed total frozen, growing by 18.9% in the last year (+£182m) to become the fastest-growing frozen food category in the last 52 weeks¹.

Young's Seafood has been at the heart of this growth, inspiring new consumers to the freezer aisle with delicious meal options and helping existing shoppers to broaden their basket with fresh ideas covering a wider range of meal occasions, says Gareth Roberts, head of frozen category management. "The result has seen us as confirmed the No.1 brand in seafood and the 35th biggest brand in UK grocery², with three of the top five selling brands in frozen fish.

"Young's has welcomed 415,000 additional shoppers in the last year, who, alongside existing shoppers purchasing our products more often, have led to record growth for our category-leading brands including Gastro and Chip Shop, as well as Young's traditional favourites."

Providing restaurant-quality dishes at home, Young's Gastro has seen 925k³ additional shoppers buy the range compared to 2019, he reveals. "As the leading premium fish brand in the category for 10 years, the range saw £79.1m annual sales, up 12.6%⁴."

With its signature bubbly batter providing the chip shop experience at home, Young's Chip Shop has seen 568k³ additional shoppers, resulting in strong growth of 8.8% and annual sales of £51.8m⁴, he adds.

"The No.1 battered brand in the UK also saw the addition of Young's Chip Shop Scampi this year to celebrate the 75th anniversary since we started producing the breaded Scampi we know and love today. The Young's Scampi range has seen sales top £37m³ across our full branded range for the first time, including Gastro Wholetail and Jumbo Wholetail, Young's Scampi and Popcorn Scampi Bites.

"Catering for a wider range of meal occasions from casual dining to helping to feed the family, we've also



“Frozen fish, was up 18.9% in the last year and became the fastest-growing frozen food category in the past 52 weeks¹”

continued to innovate this year with launch of Fish Fillet Strips, a lighter option that makes it simple to enjoy fish at any mealtime,” notes Roberts.

“To appeal to younger fans, we also teamed up with children’s food brand Annabel Karmel to create a range of frozen meals, inspiring the next generation to enjoy fish. These product developments have helped us welcome 866k³ additional shoppers equating to £66.2m sales, an increase of 3.6%⁴.

“We remain committed to our Fish for Life principles by sourcing fish in a responsible manner that helps protect the environment and planet,” he says.

“Young’s continues to be driven by a belief that a nation that enjoys fish is happier and healthier, and we aim to pass this on to the next generation. With 72% of households looking for more seafood meal inspirations³, this provides Young’s with opportunities to make sure fish takes its place on our dinner tables for years to come.”



Source

¹ Kantar, December 2020
² The Grocer, Biggest Brands 2021
³ Kantar, June 2021
⁴ IRI, 52 w/e 13.06.21

UK's No.1 SEAFOOD BRAND*



No.1
IN SCAMPI*

No.1
IN PREMIUM FISH*

No.1
IN BATTERED*



MASTERS OF FISH

*Source: IRI Total Market 52wk EPOS data to 08.08.21

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