

Frozen

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McCain Foods (GB)

Focus on sustainable growth

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KEY BRANDS

McCain
– Home Chips
– Crispy French Fries
– Naked Oven Chips
– Air Fryer Fries
– Gastro
– Jackets
– Hasselbacks
– Smiles
– Hashbrowns

↙ McCain has continued to be a strong force in the frozen food industry with a range of exciting campaigns and product launches happening throughout the last 12 months, reveals category director Naomi Tinkler. “We ended 2023 with one of McCain’s biggest product launches in years – Baby Hasselbacks,” she says. “These were developed following market research that helped us identify a gap in the market and answer the consumer need for a product that sits between ‘wholesome’ and ‘hitting the spot’. So, we created a product that feels homemade while still offering convenience and a wow factor.”

McCain’s most recent innovation is a range of Air Fryer Fries, developed following the increasing popularity of air fryers, she reveals. “Last year we updated all our products’ packaging to include air fryer instructions, making the cooking process even easier for customers. However, we also saw a gap in the market for items specifically designed for the popular cooking appliance,” she explains. “To fill this space, we commissioned research which found that nearly half of Brits (45%) now own an air fryer¹, with the nation talking about their air fryers more than Glastonbury or their own weddings. As a result, we launched a range of Air Fryer Fries, exclusively endorsed by Ninja – which include Deep Ridge Crinkle Cut and French Fry fries – and which cook in just 8 and 5 minutes.”

It has also been a busy year for campaigns at McCain, reports Tinkler. “In July, we relaunched our successful ‘Let’s All Chip In’ campaign to raise awareness on regenerative agricultural practices,” she says. “We support our farmers to adopt new sustainable farming techniques and help reach our goal of using 100% regenerative agricultural practices across our potato acreages by 2030. Given the increasingly unpredictable climate, the shift towards these practices is vital to future-proof



“Our research found that nearly half of Brits now own an air fryer¹. So we launched a range of Air Fryer Fries – endorsed by Ninja – which include Deep Ridge Crinkle Cut and French Fry fries”

UK farming, but awareness is still low among the public.

“To combat this, we created our own ‘Infinite Farm’ in the heart of Shoreditch, with an exterior reflecting the urban and bustling area, the juxtaposed inside by visual illusion of an infinite farm, filled with potato plants, wildflowers and insects – with a special voiceover that informs the public on the importance of transitioning to regenerative agricultural practices.

“As an established family favourite, McCain has been catering to families across different lifestyles and occasions for over 50 years. This has allowed us to build trust with consumers, and

investment into marketing strategies over the pandemic until now has kept McCain front-of-mind for shoppers, cementing our place in their hearts as the UK’s favourite frozen potato brand.”

Looking ahead, McCain remains committed to product innovation, focusing on creating quick, easy, and tasty options for time-poor consumers, notes Tinkler. “Over the next 12 months, we’ll work on the growth of the brand and have an exciting NPD, driven by consumer tastes and trends, with more to be revealed soon.”



Source

¹ Lakeland Trend Report 2023, Home & Kitchen Trends

Analysis

Feeding the air fryer generation

A focus on convenience, variety and air fryer compatibility are all driving considerable change and innovation in the frozen food aisles, report suppliers



↙ Affordability, convenience and a focus on food waste are keeping the frozen food category resilient as the year progresses. Suppliers are clearly keen to target the younger generation and help time-poor consumers use the latest popular cooking gadget, the air fryer. Plus, with more global cuisines entering the arena, the category is becoming increasingly diverse and exciting. Yet there is still plenty of work to be done in the supermarket aisles to make it unmissable for shoppers.

Over the past two years, frozen has outperformed totally grocery from a value and volume perspective, with quality, tasty, innovative mealtime solutions key to frozen's success, says McCain category director Naomi Tinkler. "The explosion of air fryers' popularity in the UK – with 45% of households now owning one¹ – has certainly given retailers and suppliers a new route to getting shoppers into frozen. In response to this trend, McCain has launched a new Air Fryer

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product range, including Deep Ridge Crinkle Fries and French Fries."

According to Jim Shearer, marketing director at Birds Eye UK & Ireland, the frozen food category has shown strong growth in the past 12 months (+6.2% value sales and +0.9% in volume)² as shoppers continue to look for cost-effective meal solutions and cut down on food waste by buying longer-life products. "This growth has remained stable for the past six months (+3.7% YTD in value sales and +1.3% in volume

Analysis

sales)³, making the category a reliable investment for retailers who are looking to increase sales and meet the needs of cash-conscious consumers,” he says.

Meanwhile, the fastest-growing segment in savoury frozen is frozen poultry at +13%⁴, he notes, while frozen vegetables are seeing a +8.5% value growth, but a -1.2% volume decline vs last year. The total frozen potatoes category in the UK is now worth £1bn⁵, he adds, with the chips segment representing more than 2bn meal occasions annually. In July, Birds Eye launched Crispy Chips, a hybrid between French fries and straight cut chips to cater to this sector.

The overall frozen poultry category grew by 23% in 2023⁶, says Diggersfoods UK country manager Nick Green. “The retailers enjoying the largest proportion of that growth are the ones who are bringing innovation to their shelves,” he says. “The category offering has become stagnant due to too many underperforming lines, which are not offering any point of difference or value to the consumer. Consumers are shopping frozen more frequently, so they are becoming more demanding on quality, choice and value for money.

“Six months after launching three lines on the UK market, the Diggers brand was responsible for 67% of the growth in the frozen poultry category within the retailer that stocked them,” he notes. “Due to that success, we believe there is an appetite for more innovative products on-shelf.”

The frozen food sector has maintained resilience over the past year despite navigating a rather unstable socio-economic period, says Smithfield Foods marketing & product controller Steve Mellor. “Product development trends include elevated flavours, global cuisines and health-focused options,” he says. “Our company has expanded its cooked chicken range under the Morliny brand and introduced innovative pork products like Sous Vide Korean Gochujang Pork Belly.

“Future plans involve continued product development across pork, poultry and growing the halal slow-cooked product offer.”

At Sofina Foods Europe, owner of Young’s Seafood, category insight director Iain Lowrie says that, despite shoppers switching much of their spending to the frozen food category during the recent cost-of-living crisis,



frozen fish volumes actually declined in the past year. However, over the last few months, as shoppers have become more confident with their grocery shopping, their spending on frozen fish has increased, with volumes up 2.1% and 4.9% in the last 12 weeks and four weeks respectively⁸, he says. “This suggests shoppers are returning to more scratch cooking in fish and shellfish.”

Meanwhile, the frozen meat-free category is in slight decline (-3.3%)⁹, driven by a drop in shopper numbers and smaller baskets, says THIS commercial director Jack Rutherford.

Ben Matthews, data & insights manager at Strong Roots agrees that frozen meat-free continues to face headwinds, with higher unit prices contributing to a -7.1% volume decline over the last 52 weeks¹⁰. “Retailers are rationalising ranges, with the category, experiencing a -4.3% decline in total weighted distribution points a net decrease of 37 SKUs vs a year

ago¹¹,” he says. “In this environment it is important to attract new shoppers to the category, including those who may not have considered meat-free previously. Our upcoming Air Bites launch aims to broaden the category’s appeal among the 66% of households¹² that own an air fryer.”

However, Quorn Foods consumer director Gill Riley points to the “huge” opportunity for frozen meat-free as more than one in three evening meals now exclude meat¹³. “The frozen category plays a pivotal role in our mission to get more people eating delicious meat-free meals that are better for them and the planet,” she says. “Providing ingredients that make cooking vegetarian and vegan dishes easy, convenient and affordable is key to the success of the wider category.”

Within the frozen sector, consumers are continuously seeking restaurant-quality food, which can be easily and conveniently prepared at home when

Growing trend for global flavours



Global flavours are becoming increasingly popular in the frozen food aisle, reflecting the growing desire for culinary exploration, says Strong Roots' Matthews. Some of the most popular include Asian-inspired dishes, with frozen sushi, ramen dumplings and Korean BBQ leading the charge. "Korean flavours like gochujang (a spicy-sweet chilli paste) and kimchi are increasingly featured." However, he also points to Mexican and Latin American options, such as frozen tacos, enchiladas and tamales, as well as Mediterranean and Indian cuisines.

Consumers are looking to recreate their favourite takeaways at home to save money, says Diggersfoods' Green. "Three-quarters (75%) of consumers say they are more conscious now of their spending on takeaways and meals out than they were at this time last year¹. Our internal research has indicated that Asian-inspired products are in high demand and trending upwards."

Consumers crave adventurous flavours and global cuisines, says Smithfield Foods' Mellor. "We've seen a surge in African, Latin American and Asian-inspired products, to name a few. There is also a deeper exploration of existing

popular cuisines, such as Italian, with regional ingredients and flavours being incorporated."

Indeed, the UK's growing demand for Italian food over the last few years, which remains one of the most popular world cuisines among UK shoppers, has led to Crosta & Mollica capitalising on the trend, says Lavender. "Since launching in 2009, we cemented our position as the leading premium Italian food brand in the market, with extensive growth in frozen NPD," he says.

However, one global food that has been searched on average 70% more times than Asian food and 24% more than Italian

food in the UKⁱⁱ over the past five years is Mexican cuisine, which is really having its moment within the UK food industry, reveals Quorn Foods' Riley. "Spicy dishes, like Birria tacos and loaded nachos, are particularly popular with younger consumers," she says.

With fakeaway choices evermore popular, Birds Eye's Shearer says its research shows flavour is consistently the top priority in a chicken fake-away. So, it is launching a range of products in September, including Buttermilk Chicken Tenders, Hickory BBQ Wings, Hot & Fiery Chicken Chunks and Honey Sriracha Chicken Wings.

short of time, says Crosta & Mollica marketing director Dean Lavender. "This is exactly what we offer within our frozen range, including pizza, dessert and ready meals," he says. "2024 has seen two new launches within our frozen pizza and dessert categories. In May we introduced a new Roast Garlic & Mozzarella Pizza Bread, our first take on a garlic bread, and in June we launched a new flavour within our Gelato range, Mascarpone Stracciatella Gelato, which has proved popular since launch."

What are the key category drivers?

While the cost-of-living crisis is easing in some areas, frozen food remains popular due to its value, convenience and long shelf life, says Smithfield Foods' Mellor. "Affordability is very important consumers," he notes. "Convenience, premiumisation and health consciousness remain key trends. For example our focus on innovative flavours and coatings can

be seen as a response to consumer demand for premium yet affordable products. Our Morliny cooked chicken range covers products from the humble but delicious Tempura Nuggets all the way up to Japanese Yakitori chicken thigh chunks."

Value for money will have been a considerable driver in the frozen category over the past two years, says THIS' Rutherford. "There's also the convenience lens, whereby frozen allows shoppers to have food already in the house with a longer shelf-life, which is quick and easy to prepare," he adds.

"The cost-of-living crisis has led to shoppers finding ways to make their money go further," says Quorn Foods' Riley. "Frozen food can be relied upon to affordably feed the whole family, while ticking the box on having a longer shelf life to fit in with busy lifestyles and reduce wastage. Cooking straight from frozen also means that busy families can save time on

preparation and cooking, which can be a real life-saver during the week."

Health & sustainability also continue to be key drivers in meat-free food decisions, she adds. "Consumer awareness around both of these trends has led to an increase in meat-eating shoppers engaging more frequently with the category," she says. "Value for money has also been driving the shift in shopping behaviour, across all categories."

In financial terms, around four in 10 households remain 'managing'¹⁴, which means they are still searching for affordable treats, says Sofina Foods' Lowrie. "The sector also needs to recognise that one in five households are still struggling¹⁵ and, as such it is essential we continue to provide great value, great-tasting products at different price points across our range."

In frozen fish, health is always a consideration and, regardless of whether it is Chip Shop Battered Fish or

Analysis

Young's Salmon Fillets, shoppers see frozen fish as a healthier alternative to other frozen foods they can buy, he adds. "Sustainability is another key driver that is becoming increasingly important... as is premiumisation."

Over the past five years, convenience cooking has become more and more important to consumers – almost as important as scratch cooking to our diets, says Birds Eye's Shearer.

"Shoppers and consumers are increasingly having to balance health and convenience; 71% of households cook from scratch at least three times a week (no change vs 2021) and 46% of households eat ready meals at least once a fortnight (up 2 points on 2021)¹⁶," he says.

Meanwhile, health remains a key purchase driver, with shoppers growing their awareness and understanding of what health means for them, leading to possible changes in shopping habits and potential new entrants into the frozen category, he adds, noting that 91% of Birds Eye and Aunt Bessie's sales now come from non-HFSS products¹⁷.

While 23% of customers see the cost of living as their most important concern in March 2024, Shearer notes that this is down from 33% in November 2021, whereas health & wellness have risen on the importance scale to 32% from 26% in 2021.

Restrictions in household spending and the desire to make money go further perfectly positions frozen food with shoppers, says McCain's Tinkler. Shoppers rediscovered the benefits of frozen during the pandemic and are continuing to shop frozen to now. In McCain's research "shoppers told us frozen ranges and quality have stepped up vs their previous expectations, giving them an improved experience," she says. "They also told us frozen really helped them budget, is great value for money and allowed them to reduce food waste, while giving them peace of mind as they'd always have something in to feed their family."

In the past, the frozen category hasn't been regarded as a particularly premium option, says Crosta & Mollica's Lavender. "So, when a brand like ours enters the frozen market and delivers superior quality, we drive value and draw shoppers in.

"The frozen category also provides more convenient meals solutions



for busy consumers than chilled or ambient, allowing time-poor foodies to store full meals for long periods of time that can easily fit into their busy schedules, minimising food waste."

The air fryer trend has no doubt been a factor in the growth of the frozen category, says Diggersfoods' Green. "We include air fryer cooking instructions on-pack and our social media highlights the multiple recipe applications of our products and heavily features air fryers in recipe demonstration videos."

All of these trends will be impacting the category in different ways and at different speeds, says THIS' Rutherford. "We know that, in meat-free, frozen is a little behind chilled in terms of premiumisation and cadence of NPD, for instance. These are linked to broader consumer macro trends such as sustainability or health & wellness that continue to reshape the category. THIS is very well placed to support

consumers in making more sustainable and healthier choices."

Frozen foods also offer a significant advantage in terms of shelf life, which is especially appealing during times of economic uncertainty, says Strong Roots' Matthews. "Shoppers are increasingly mindful of reducing food waste, both for financial and environmental reasons." He also points to frozen as offering cost-effective meal solutions for price-sensitive consumers, a good solution for home entertaining as dining out becomes more costly, and the versatility and flexible meal planning that frozen can offer."

Looking ahead

The popularity of air fryers, a focus on sustainability and reducing waste will fuel the continued growth of the frozen category, says Diggersfoods' Green. "As the category grows, so will the innovation within it," he says. "Existing brands will no doubt be looking to

How the frozen aisle stacks up

One of the key ways to appeal to younger consumers is to make the frozen aisle easier to shop and to add some badly needed branding and excitement, says Sofina Foods' Lowrie. "Branded bays have been one key tactic we have used. Not only have they helped to communicate a sense of intrigue around the launch of our Gastro's Taste of Asia, but frozen is not a part of the supermarket where people spend long browsing. So, branded bays have an impact by drawing them in, making them easy to shop and in promoting the trial of new products."

McCain's Tinkler believes that retailers have been focusing on

making their frozen aisles more inviting and inspirational in recent years, moving to strongly visual signage, which cues food values and eating occasions. "Promotions have also focused more strongly on providing consumers with solutions, whether it's a family takeaway, kids tea, meal for two or a party food selection for an in-home gathering," she says.

That said, consumers in the UK still have a negative perception of the frozen aisle, says Crosta & Mollica's Lavender. "This negative perception is something we are constantly focused on improving in

the UK through our marketing and creates huge opportunities for the market to grow. However, our frozen pizzas are up to 83% incrementalⁱⁱⁱ, meaning most people who purchase our frozen pizza are new to the category and likely to be drawn to us for our premium quality."

"It is imperative for brands and retailers to acknowledge younger consumers as a key demographic, as they are the category's future," says Birds Eye's Shearer. "Kantar research shows us that young adults with no children use frozen food in more meal occasions than empty nesters or retirees – 30.4% of occasions vs 29.9%^{iv}

– so there is a clear opportunity to target these consumers further."

Strong Roots' Matthews reckons the frozen aisle could become more dynamic with interactive displays and digital signage offering cooking tips, recipe ideas and nutritional information; themed sections, such as 'global cuisine' 'health & wellness' and 'quick meals'; sample stations to encourage trial and purchase; and enhanced packaging and branding with clear labels to highlight the products' benefits, such as 'plant-based' or 'high protein', he says.

extend their lines to offer more within the subcategories they are in. Meal kits, particularly ones that replicate takeaway meals, is one subcategory that we could potentially see existing brands and new brands enter."

Consumers seek tailored options and time-saving solutions, leading to increased demand for meal kits and other customisable options, agrees Smithfield Foods' Mellor. "Flavour, convenience and personalisation will shape the frozen food market," he says.

Crosta & Mollica's Lavender sums it up succinctly: "Health-conscious consumers will be looking for foods that are UPF-free with clean labels, made with simple recognisable ingredients. Time-poor consumers will be looking for convenient and easy meal solutions that are still premium and high-quality."

Meanwhile, McCain's Tinkler points to convenient entertaining at home, sustainably sourced products and rise in air fryer usage as three key

trends impacting the frozen food market over the next year. "With the cost-of-living crisis prompting consumers to reduce spending on dining out, there is an increasing trend towards hosting gatherings at home," she says. She also points to the growing consumer demand for sustainably sourced products, which has prompted the company's focus on regenerative farming, and the surge in air fryer popularity, with an increase in products designed specifically for air fryers. "This trend reflects the broader shift towards kitchen appliances that enhance cooking efficiency and convenience, driving demand for compatible frozen products," she says.

With greater competition for freezer space in general, retailers are cutting down on duplication, says Sofina Foods' Lowrie. "This means brands need to create genuine innovation to unlock and retain space – and this needs to sit alongside high-quality

staples that cover a variety of price points and consumers.

"Promotions are also likely to become increasingly important to generate repeat purchase, keeping shoppers coming back to the frozen aisle, while premiumisation will continue, adding new global flavours and formats that speak to a wider range of consumers."

Sources

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- ² Nielsen Scantrack, Total Defined Frozen Food, Value and Volume sales, L52wks and YTD w/e 13.07.24
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- ⁵ Nielsen, Total Frozen Potatoes, MAT 52 w/e 10.08.24
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- ⁷ Dunhumby, 12 wks from 25.09.23 to December 2023
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- ⁹ Kantar Worldpanel, L52 wks to 09.06.24
- ¹⁰⁺¹¹ NielsenIQ, Discover, Frozen Potato, Meat-Free, Veg Foods and Chips categories, 52 w/e 15.06.24
- ¹² Toluna, Start Survey, n = 651, UK nat rep
- ¹³ Kantar, 52 w/e 12.05.24
- ¹⁴⁺¹⁵ Kantar, June 2024
- ¹⁶ Kantar Usage: % share of total savoury food at our main meals, rolling 52 w/e 17.03.24
- ¹⁷ Birds Eye and Aunt Bessie's net sales, 2023

Global flavours

- ¹ Ocado, 03.06.24
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Frozen aisle

- ¹⁸ Crosta & Mollica internal data
- ¹⁹ Kantar UK, Usage Panel, August 2023

Bannisters Yorkshire Family Farm

Spuds in the spotlight

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Bannisters Yorkshire Family Farm
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 – Little Jacket Potatoes
 – Cheese & Bacon Potato Skins
 – Cheese & Jalapeño Potato Skins
 – Cheese & Onion Potato Skins
 – Farmer’s Roasting Potatoes
 – Hasselback Baked Potatoes

↙ The Bannister family have been baking and freezing British potatoes since 1985. The first to launch frozen baked jacket potatoes into retail freezer aisles back in 2007, they’ve been championing this hearty and hassle-free meal option for decades.

But 2024 has seen a host of home chefs discovering the jacket’s deliciousness for the first time, thanks to viral videos taking the internet by storm, reveals Zoe Bannister, joint managing director.

“From Americans trying them on TikTok to journalists joining the queue at Spud Man’s food truck, loaded baked jacket potatoes have been one of the year’s biggest culinary crazes,” she says. “Recipes and toppings have been the talk of the town, including old classics like baked beans and tuna along with more inventive ideas like brown sauce and even caviar. There has also been a return of the age-old debate, how to achieve the perfect crispy bake?”

Alongside this next generation revival of the baked spud, frozen food continues its upward trajectory as Brits look for ways to save time, money and waste like never before. Footfall to the frozen aisle is on the up and the category continues to break down barriers with favourable feedback around freshness and flavour.

“With decades of farming, baking and freezing under our belts, we like to think we know a thing or two about the perfect baked jacket potato and it has been a joy to see them in the spotlight this year,” says Bannister. “At Bannisters, our driving force is to



“Our driving force is to create wholesome frozen food that’s convenient without compromise”

create wholesome frozen food that’s convenient without compromise. We only ever source British potatoes, baked in our signature style using traditional ovens so they taste as good as, or even better, than homemade and then frozen to take away the fuss. For jacket lovers, it’s become a real ‘if you know, you know’ meal hack.”

Alongside the company’s signature jacket potatoes, available in four different pack formats including six ‘little jackets’, Bannisters offers a range of ready-baked filled potato skins, roasting potatoes and Hasselbacks, which continue to prove popular among Bannisters’ loyal shoppers.

Bannister concludes: “Jacket potatoes are the ultimate comfort food. But baking them to perfection is an art not a science, taking time that busy families and individuals can’t always afford. That’s where stocking up on Bannisters comes in handy – all the hype, minus the hassle.”



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Birds Eye

A new chapter for Birds Eye

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Aunt Bessie's
Goodfella's

One hundred years ago, Clarence Birdseye invented the flash-freezing process that the global frozen food industry still uses today. His name and commitment to quality, convenience and accessibility live on in the Birds Eye brand, which is undertaking an important packaging design makeover this year. The change will help improve the shopper experience and drive greater visibility of Birds Eye's wide range of family favourites, to encourage existing shoppers to increase their basket size and attract new shoppers to the freezer aisle, says the company.

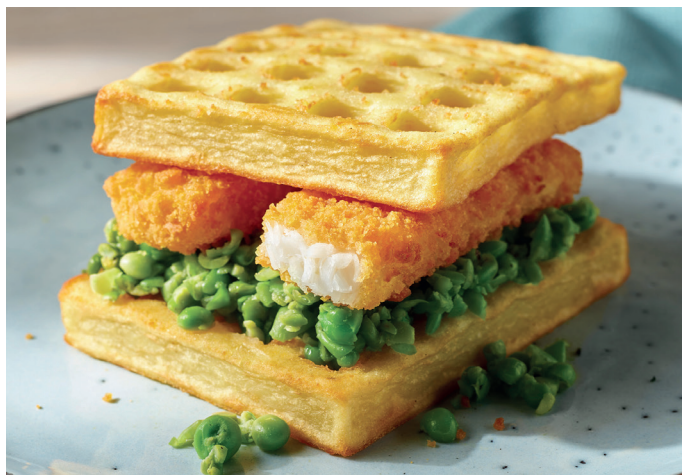
Potential for further growth

The frozen category continues to grow, with volumes rising by 0.9% over the last 12 months¹, but there is still huge potential. In-store, frozen still faces challenges, with research showing shoppers spend as little time as possible in the aisle². As the UK's leading frozen food brand³, Birds Eye is committed to helping shift perceptions of the category and drive appeal. Pack design is critical as, with up to two-thirds of purchase decisions made at fixture⁴, a good, distinctive brand identity is more than simply visual – it drives sales.

A one-stop shop

The entire Birds Eye brand will benefit from a cohesive new design which, in research, delivered +26% in 'attention stopping power' vs competitors⁵, it reveals. The change aims to modernise the category with new photography and a vibrant fresh look and feel. As the only frozen food brand that can offer shoppers a full meal solution – from protein to carbohydrates to vegetables – Birds Eye's new packaging will act as a category beacon across segments and drive re-appraisal of frozen food and its benefits, says the company.

The new design delivers a clear communication hierarchy that reflects the needs of the consumer; from simple



“The Birds Eye brand is undertaking an important packaging design makeover this year. The change will help improve the shopper experience and drive greater visibility of the brand's wide range of family favourites”

descriptors and easy-to-see – and easy-to-follow – cooking instructions, to clearer health and sustainability credentials, and cross-category recommendations. All new packs will also deliver improved accessibility through the inclusion of NaviLens technology, helping blind and partially sighted shoppers to locate products and read pack information more easily both in-store and in their own freezers.

Catering to a younger audience

The packaging redesign is strategically timed to coincide with one of Birds Eye's biggest periods of innovation in recent years. Following the launch of Mini Fish Fingers, Steamfresh Meals, and its entry into the Chips category earlier this year, the brand will continue to drive appeal and trial with younger shoppers in September by expanding its Chicken Shop range with seven new products, to capitalise on the growing Fakeaway occasion. The launches will be supported by a £4.5m campaign.

For every household – from time-poor lunches to midweek fakeaways, and every teatime in between – Birds Eye is confident the new brand design will make shopping easier and more inspirational for consumers.



Source

- Nielsen Scantrack, total defined frozen food, value and volume sales L52wks and YTD w/e 13.07.24
- Truth Research/Future Thinking Research
- NielsenIQ RMS data: Birds Eye – customised Frozen Summary excl. Frozen Sweets – MWB 52 Weeks ending 18.05.24
- Future Thinking Research
- Dragonfly AI on-shelf testing June 2024 across vegetables, fish and potatoes competitor packaging

Pack image (above)

* Birds Eye fish fingers packaging in 2024 (left) and in 1957 (right)

Same trusted
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The full meal solution,
from the No.1 brand in frozen*



it better be
BirdsEye

*Source: NielsenIQ RMS data: Birds Eye - customised Frozen Summary excl. Frozen Sweets - 52 wks w/e 18/05/2024

Crosta & Mollica

Italian flair for food-lovers

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- Stromboli Sourdough Pizza
- Vegana Sourdough Pizza
- Margherita Sourdough Pizzettas
- Stromboli Sourdough Pizzettas
- Gluten Free Margherita Sourdough Pizza
- Pistachio Almond Tartufi
- Tiramisù
- Amarena Cherry Mascarpone Gelato

 Crosta & Mollica (translated from the Italian to ‘Crust & Crumb’) was founded with the aim of bringing authentic, artisanal and regional Italian specialities to the dining tables of food-lovers everywhere. “Since launching in 2009, we have been cementing Crosta & Mollica’s position as the leading premium Italian food brand in the market, with extensive growth in frozen NPD over the past few years, offering restaurant-quality, premium meal solutions that can be cooked conveniently at home,” says marketing director Dean Lavender.

“As people are increasingly happy to ‘trade in’ and dine at home due to inflation pressures, demand is rising for authentic, great-tasting frozen meals that can easily be prepared at home,” he notes. “At Crosta & Mollica our growth has remained strong through 2024, ending the FY +39% to the end of June¹. This is a result of distribution and listings increases, wider product availability in stores and, importantly, more and more consumers discovering the high quality of our products.

“Leading the brand’s growth is our popular Neapolitan-style Sourdough Pizza range,” he reveals. “The range provides convenient meal solutions for the busy consumer and is attracting completely new shoppers to consider the frozen aisle, with 83% of buyers being incremental to frozen pizza².

“Made with a sourdough base, a deep and crunchy crust and generous toppings, our extensive pizza range includes chilled and frozen options, in standard format and Pizzetta twin packs (smaller pizzas for lighter bites and single serves). Flavours include family favourites like Stromboli with Pepperoni & Spicy Salami and the Italian icon, the



“Our extensive innovation offers a complete Italian experience at home, from Aperitivo to Primi and Dolce”

Margherita. We hold the widest range of options in the market for the modern pizza-eater, with styles to suit all diets including vegan and gluten-free.

Strong product development

Innovation is core to Crosta & Mollica’s frozen offering, and the brand’s close relationship with retail customers means they trust its ability to deliver strong product development, says Lavender. “Our extensive innovation offers a complete Italian experience at home from Aperitivo to Primi and Dolce,” he explains. “We launched a frozen dessert range in 2022, including a Tartufi (a traditional Italian gelato-based dessert in pistachio, coffee and chocolate flavours) and Gelato range, Tiramisù, and more, most recently expanding the range with Mascarpone Stracciatella Gelato, which launched in May. Due to the breadth of the frozen desserts range, we have been able to justify a fully branded Crosta & Mollica frozen desserts bay in two of our leading grocery customers.



Source

¹ Internal company data
² Nielsen, Frozen Pizza, YOY Growth to 29.07.24



Margherita: Tomato & Mozzarella



Stromboli: Spicy Salami & Pepperoni

SOURDOUGH PIZZA

MADE IN ITALY



CROSTA & MOLLIKA

NIQ, Crosta & Mollica
value and volume,
52wks vs LY to 1st June 2024.



Diggersfoods

The age of the air fryer

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Diggers
Seafeast

 Air fryers have become a kitchen staple in the UK, with over 30% of households owning one¹. Their convenience and affordability have likely contributed to the growth of the frozen food market, especially in frozen poultry. From January 2023 to January 2024, air fryer sales have surged by 23%². What used to be an occasional purchase for a cheat meal or treat has now become a regular item on shopping lists, attracting both loyal customers and newcomers.

Quality matters more

As the frozen poultry market continues to grow, shoppers are becoming more discerning about what they're buying, says Diggersfoods UK country manager Nick Green. "They're not just looking for convenience; they want meals that are nutritious and of high quality, too," he notes. "Diggers' success, since launching in the UK in March 2023, is down to our commitment to quality. Every piece of chicken in our range is hand-cut from whole fillet, ensuring our customers get the best every time."

Lack of choice freezes growth

But it's not just about quality, he adds. "Consumers are also seeking more variety in their options. In fact, 60% of consumers feel that the current frozen poultry offerings are boring³. The market is flooded with 'me too' products, and there's a real need for innovation to keep things fresh and exciting. That's where Diggers comes in. Our range is designed to shake things up and give consumers the variety they crave."

See it, get it, love it

"However, simply offering a new



“60% of consumers feel the current frozen poultry offerings are boring³ ... and there's a real need for innovation to keep things fresh and exciting. That's where Diggers comes in”

product isn't enough," says Green. "Diggers is committed to adding real value by showing our customers how to make the most of our products. Through our social media channels, we share exciting recipe ideas that our customers can try at home. This approach has captured the public's attention, and Diggers now boasts the largest following on Instagram of any frozen poultry brand in the UK or Europe⁴."

Frozen food, fresh ideas

The frozen food category has become stagnant in recent years, characterised by a lack of novel flavours and culinary profiles, adds Green. "Taking the lead on revitalising the sector in Ireland, by introducing a diverse range of flavours and products such as boneless wings and complete spice bag meals, we have successfully redefined the category."

Source

¹ Leatherhead Food Research, 'Lifting the hood on the UK's air fryer trend', 18.11.22
² Kantar, Frozen Poultry Market, 52 w/e 22.01.24
³ Vypr Report, May 2023
⁴ Instagram, August 2024

Diggers®

DISRUPTING
the frozen food aisle



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Breast Fillet

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Quorn Foods

Give frozen sales a cool boost

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KEY BRANDS

Quorn Mince
Quorn Pieces
Quorn Sausages
Quorn Crispy Nuggets
Quorn Cheesy Nacho Nuggets

Quorn, the UK's No. 1 meat free brand¹, continues to dominate the frozen category with a diverse portfolio of products that cater for all meal occasions.

The frozen meat-free sector remains a strong performer for Quorn, which has experienced over two-and-a-half years of consecutive monthly market share growth in this area². The brand has the top SKUs in the two biggest frozen meat-free sectors, ingredients and centre plate breaded³, with its best-selling Mince and Nuggets products.

Gill Riley, consumer director at Quorn Foods, says: "Frozen is a really important category for us. With more than one in three evening meals now excluding meat⁴, the opportunity for frozen meat-free is huge. The category plays a pivotal role in our mission to get more people eating delicious meat-free meals, that are better for them and the planet.

"The easier and tastier the swap is, the more shoppers will repeat-purchase so providing ingredients that make cooking vegetarian and vegan dishes easy, convenient and affordable, is key to the success of the wider category. Quorn as an ingredient is so versatile. From Quorn Mince to Quorn Pieces, our SKUs are protein-packed, great-tasting and can be used across a variety of mealtime occasions and dishes, making them a must stock for retailers."

The importance of innovation

Consistent innovation is an important driver for the meat-free category, to ensure brands remain at the forefront of shoppers' minds, adds Riley. New products excite new and existing shoppers and are an enticing entry point to the category for first-time meat-free buyers, she says.

Quorn's most recent innovation was developed after discovering the social trend for homemade breaded chicken with crushed up tortilla coating. Quorn Cheesy Nacho Nuggets (RRP £2.50, 240g are launching in Tesco stores on 9 September,



“With more than one in three evening meals now excluding meat⁴, the opportunity for frozen meat-free is huge”

followed by Sainsbury's, Asda and Morrisons in October.

"We're always keeping a close eye on trends, so we can launch the products that we know consumers will love," adds Riley. "The demand for our Quorn Cheesy Nacho Nuggets will be huge. There's a real appetite for crunchy bold flavours, and they performed exceptionally well in consumer research, with 97% saying they thought the product was new and different and over two-thirds saying they loved the concept⁵.

"As a first of its kind in the category, we're confident that they'll add excitement to the freezer and give consumers another reason to try meat free by offering them an easy and delicious swap.

"We're incredibly proud of our chicken range. We know from our extensive sensory and scientific research that it's some of the best in the market in terms of flavour and texture. Our new Quorn Cheesy Nacho Nuggets add to the breadth of our range, which is already a big penetration and frequency driver for retailers."



Source

¹ Circana, Total Market, Value Sales, 52 w/e 15.06.24
² Circana, Total Market, Value Sales, 52 w/e 15.06.24
³ Circana, Total Market, Value Sales, 52 w/e 15.06.24
⁴ Kantar, 52 w/e 12.05.24
⁵ Toluna; Quorn Foods research, 2024.

2½ YEARS OF SHARE GROWTH*



SO TASTY WHY CHOOSE THE ALTERNATIVE?



*CIRCANA, TOTAL MARKET, FROZEN MEAT FREE VALUE SHARE, 12W/E 15.06.24

Smithfield Foods

Creative solutions to customise meals

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KEY BRANDS

Berlinki Hotdogs
Morliny
Krakus
PEK

Source

^{1,2} Circana, Total Market, Value Sales, 52 w/e 15.06.24
³ Smithfield Foods Ltd, Internal sales data 2023 UK

Smithfield Foods is a leading supplier of meat products to UK retail, foodservice & manufacturing. Its offer includes Berlinki Hotdogs – the No. 1 product¹ among Eastern European world foods in the UK; Morliny and Krakus, two top UK world foods brands worth in excess of £31m RSV²; and PEK, a top UK canned meat brand with over 22,000 cans sold per day³.

The company's Morliny brand is driving innovation in the frozen cooked chicken category, says Steve Mellor, marketing & product controller. "Our dedication to quality and taste is evident in our diverse product range, which includes everything from succulent Chicken Kebabs to innovative Chicken Nachos," he says. "By continually expanding our offerings, we aim to satisfy the evolving preferences of today's consumers."

"Effective product placement is crucial for driving sales. Our packaging is designed to stand out on frozen



“Our dedication to quality and taste is evident in our diverse product range”

aisles, making it easy for shoppers to discover the Morliny difference.

“Customisable meal solutions are a promising opportunity. By offering products with accompanying flavourings or seasonings, we can empower consumers to create unique and delicious dishes, aligning with the growing trend towards personalised dining experiences.”

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KEY BRANDS

THIS™ Isn't Beef Mince
THIS™ Isn't Streaky Bacon
THIS™ Isn't Beef Burgers
THIS™ Isn't Chicken Pieces
THIS™ Isn't Lamb Kebabs

“There’s a huge opportunity in frozen meat-free to bring in new consumers and help us on our mission to protect the planet and take animals out of the food chain. In only our second year in the frozen category, we’ve focused on driving this mission by growing and establishing our core product range rather than diving into extensive NPD,” says Jack Rutherford, commercial director. “That said, we launched THIS Isn’t Beef Mince in January 2024. Looking ahead, we have exciting plans to elevate the frozen meat-free category to set a new benchmark for quality in frozen. We’re also exploring NPD to attract new consumers, with the potential launch of a popular out-of-home product in 2025.”

“We’re committed to delivering great value for shoppers because we know affordability is crucial in the frozen aisle. Competing with legacy brands like Quorn and Linda McCartney, that dominate shelf space, is a clear



“We’re committed to delivering great value for shoppers, as we know affordability is crucial in the frozen aisle”

challenge but we’ve gained traction by securing impactful brand blocks and by updating our packaging to a more premium look and feel, alongside running effective promotions.

“Taste is still the number one priority for shoppers and we’re offering superior products that encourage sustainable choices. By raising the bar for quality in frozen, we’re confident that we can make a positive impact on both consumer behaviour and the planet.”

THIS IS 100% PLANT-BASED (NOT THAT YOU CAN TELL)



Sofina Foods Europe

Leaders in frozen seafood

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KEY BRANDS

**Young's
 Gastro
 Chip Shop**

Young's has a 200-year history of seafood expertise and, since joining Sofina Foods in 2021, has continued to drive the category through innovation and quality improvements to cement its position as the No.1 brand in frozen seafood¹.

Young's has outperformed the wider frozen seafood category in the past year, says Iain Lowrie, category insight director at the company. "Key to our success has been providing shoppers with affordable options that offer great-tasting, value alternatives to takeaways and eating out, as well as genuine innovation to create new occasions to enjoy frozen fish," he says. "Shoppers continue to seek out traditional flavours and formats, which has driven +37% volume growth of our Chip Shop brand, the No.1 in battered fish²."

Despite many shoppers starting to feel more confident in their spending, a considerable number of UK households are still managing their budgets carefully, meaning that the fish & chip takeaway – which now costs £11.50 on average – is out of reach for many. So, retailers still need to provide affordable alternatives that offer the 'treat factor', which Chip Shop, with its authentic bubbly batter, is well placed to provide. "We've attracted 500,000+ new shoppers to the Chip Shop brand in the past year alone³ and have some exciting NPD coming soon to attract shoppers looking for chip shop quality at an accessible price point," says Lowrie.

Meanwhile Young's Gastro brand, the No.1 premium brand in frozen fish⁴, has a reputation for bringing innovation to the category through its mission to offer restaurant-inspired fish that is easy to make at home, notes Lowrie. "And our Taste of Asia range has also



“75% of all frozen fish occasions are served with chips⁵, but consumers would eat frozen fish with rice and noodles if the flavour was right⁶”

brought much-needed excitement this year, as it is inspired by the distinctive, authentic flavours of East Asia,” he says. “75% of all frozen fish occasions are served with chips⁵, but our insight has found consumers would eat frozen fish alongside rice and noodles if the flavour was right⁶,” says Lowrie. “So we developed a range of delicious coated products, enabling them to enjoy frozen fish in more varied ways.”

With global cuisine now accounting for 30% of all lunch and evening meal occasions⁷, Taste of Asia has delivered nearly £2m in sales and attracted 90,000 additional shoppers to frozen coated fish⁸ since it launched in March 2024. “It demonstrates the growth opportunities possible in the category, and we are looking at how to develop the range further,” says Lowrie.

With more exciting innovation ahead, Young's seeks to drive the category forward and show shoppers how versatile, affordable and delicious frozen fish can be.

Source

- ¹ Nielsen, GB Frozen Seafood, EPOS Value Sales, 52 w/e 13.07.24
- ² NIQ, 12 weeks to 15.06.24
- ³ Kantar Frozen Fish 52 w/e 07.07.24
- ⁴ Nielsen, GB Frozen Seafood, EPOS Value Sales, 52 w/e 13.07.24
- ^{5,6} 3GEM – October 2020 (online with 518 shoppers)
- ⁷ Kantar, State of the Nation 2023
- ⁸ NIQ, 15.06.24





BRITAIN'S No.1 SEAFOOD BRAND*



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IN SCAMPI*



No.1
IN BATTERED*

No.1
IN PREMIUM FISH*



*52 week data (Source – NIQ GB
Frozen Seafood w/e 13th July 2024)

Strong Roots UK

Transforming frozen snacking

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KEY PRODUCTS

Air Bites
– Crispy Carrot & Spinach
– Crispy Pea & Lemon
– Crispy Veg

Strong Roots, the trailblazer of veg-forward frozen food, is excited to unveil its latest innovation: Air Bites – a trio of delicious products that will redefine frozen snacking, says Laura Smith, VP of marketing at the company. “Adding Air Bites to Strong Roots’ line-up of healthy, plant-based foods was inspired by insights revealing that shoppers are lacking tasty and inspiring choices for a quick snack they feel good about, which are also tasty and packed with flavour,” she reveals. “Air Bites have been perfectly crafted for the air fryer, to deliver crispy, veg-packed goodness in under 10 minutes.”

Launching in Sainsbury’s, Waitrose, Morrisons, Asda and Ocado this October, followed by Tesco in January, the first three Air Bites come in the following mouthwatering flavours: Crispy Carrot & Spinach, Crispy Pea & Lemon and Crispy Veg (RSP. £2.95), she explains. “Ready in less than 10 minutes, these bites have a crispy exterior and are bursting with flavour and nutrients. Strong Roots Air Bites are perfect for any occasion – whether you need an afternoon pick-me-up, quick lunch or an easy party platter.”

The Air Bites trio:

- **Crispy Carrot & Spinach** – a vibrant mix with 48% spinach, wrapped in a crispy carrot crumb, with only 165 kcals per serving (four bites);
- **Crispy Pea & Lemon** – sweet peas (58%) with a zesty lemon kick, encased in a crispy carrot and beetroot crumb, at just 181 kcals per serving (four bites);
- **Crispy Veg** – a tasty blend of vegetables (34%) and brown rice, coated in a crispy puffed quinoa crumb, at 188 kcals per serving (four bites).

“Packaged in recyclable gusseted bags, our Air Bites are easy to stock, display and love,” adds Smith. “The bright, eye-catching packaging highlights key attributes, such as being certified vegan, low in saturated fat and having no artificial colours or flavours.

“True to our mission, we proudly display the climate footprint on the front of every pack, showcasing our



“We see a fantastic opportunity to attract new consumers, expand the frozen meat-free category, and bring even more people into the plant-based fold”

commitment to transparency and sustainability from soil to shelf.

“We’re all about creating delicious, plant-based food for busy lives that people want to eat, and we’re thrilled to add Air Bites to our range,” she says. “With the air fryer trend booming, and the rising demand for healthy, plant-based options, we’ve crafted these recipes specifically for the air fryer. We see a fantastic opportunity to attract new consumers, expand the frozen meat-free category, and bring even more people into the plant-based fold. We can’t wait to hear what you think!”

On a mission to fix the freezer aisle, Strong Roots is dedicated to making plant-based eating easier and more accessible, driving positive change in the food industry. Smith concludes: “As a certified B Corp, our delicious plant-based options are sustainably sourced, making them better for you and the planet.”



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