

Frozen

NEW

STAND OUT SHARERS HAVE ARRIVED



Grab it. Crisp it. Top it. Share it.

Bringing new Vibes to the frozen sector

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KEY BRANDS

McCain

- Home Chips
- Crispy French Fries
- Naked Oven Chips
- Air Fryer Fries
- Gastro
- Jackets
- Hasselbacks
- Smiles
- Hashbrowns
- Vibes

➔ McCain remains a dominant player in the frozen food category, driving momentum through innovative campaigns and exciting product launches over the past 12 months, reveals Carly Collins, senior category development lead at the company. “Earlier this year we launched Vibes, McCain’s biggest innovation in years,” she says. “As a snack built for all occasions and great for sharing, Vibes were developed to be the perfect mix between a crisp and a chip, and spark consumer debate. We launched this product with a recreation of Rodin’s iconic ‘The Thinker’ statue at Battersea Power Station, holding a Vibe and pondering how to describe it.”

Regenerative agriculture

It has been another busy year for campaigns at McCain, adds Collins. “We started 2025 with ‘Taste Good Feel Good’, our global campaign aimed at furthering consumer awareness of regenerative agriculture,” she says. “We created the ‘Farm of the Future’ at New York’s Chelsea Market to engage consumers and reveal McCain’s goal of using 100% regenerative agriculture across our potato acreages by 2030. Given the increasing unpredictability of the climate, this campaign is important as regenerative agriculture practices will be vital to future-proofing farming.

“Inspired by research that fewer than



“As a snack built for all occasions and great for sharing, Vibes were developed to be the perfect mix between a crisp and a chip, and spark consumer debate”

1 in 10 Brits understand regenerative agriculture¹, we continued our ‘Let’s All Chip In’ campaign, taking over the Outernet digital exhibition space in London. Visitors were invited to play the interactive Farms of the Future game, where users become farmers, learning how healthy soil today aims to protect the future of food.”

Family-favourite brand

McCain has catered to families across different lifestyles and occasion for more than 50 years, notes Collins. “Over this time, we’ve built and maintained trust with consumers. Our product marketing strategies help bring families together over mealtimes, and have seen us perform consistently well. Consumers continue to pick up McCain products from freezer shelves as they can envision their complete meal when making their purchasing choices.”

Looking ahead, McCain remains committed to its pledge of 100% regenerative farming by 2030, she adds. “We are implementing practices such as crop rotation, planting wildflowers, and reducing soil disturbance to enhance soil health and support biodiversity. We will also continue to debut innovative products that support creative, tasty, quick and easy meal options. We aim to continue being a pioneer in the frozen chips sector and, over the next year, we’ll grow the brand through exciting NPD, driven by consumer tastes and trends, with more to be revealed soon.”



Source

¹ McCain commissioned YouGov research, 11-19 February 2025, n=2150 UK adults aged 18+

Analysis

Ready for the next chapter

Frozen food is evolving rapidly to meet changing consumer demands, but what key trends are emerging?



➔ Cold, isn't it? Well, not exactly. This summer, say the pundits, will almost certainly be the hottest on record¹ – and that has been spelling good news for the likes of frozen food snacks such as ice cream and lollies.

Yet the frozen food category clearly has a much wider remit than that – and, increasingly, appears to be moving with the times. From quick air fryer snacks to indulgent desserts and smoothie bowls, the frozen food aisle is becoming a more exciting place to shop. And its key credentials of serving time-poor consumers while saving on overall food waste is standing the category in a positive light with today's consumers.

McCain Foods (GB) says the frozen food category has continued to perform strongly over the past year, driven by consumer demand for convenience, value and innovation. “We’ve seen

particular momentum in the growth of snack ranges, with more people staying in rather than going out,” says Carly Collins, senior category development lead at the company. McCain has embraced this trend with the launch of Vibes, a hot snack designed for social occasions, that combines “the crispiness of crisps with the fluffiness of chips”, she notes. For the rest of 2025 and into 2026, McCain plans to invest in innovation that reflects evolving consumer needs, including expanding its popular Air Fryer range to meet the growing ownership of air fryers, and bringing out new flavours in some of its popular ranges.

However, snacking is a big opportunity missed for the frozen category, according to Little Moons director of marketing, innovation and sustainability Ross Farquhar. “In the

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UK, we snack a lot, with eight out of 10 of us saying we are going to snack as we do now or more in the future²,” he says. Snacking sales across categories in the UK topped £25bn this year and will top £30bn before the end of the decade³.”

But ice cream has failed to capitalise on this huge trend, with its share of snacking occasions only rising to almost 4%⁴ – tiny compared to confectionery, biscuits, crisps and popcorn, he notes. “Where ice cream is rooted in a single occasion (80% of which are dessert) focused on a narrow shopper base and highly seasonal, snacking is the reverse – new, growing occasions, a younger more affluent shopper base and consumed all year round⁵.” Little Moons is pioneering sweet snacks in the category, launching frozen cheesecake bites last year with new flavours recently added, he says.

At Sofina Foods Europe, owner of the Young’s brand, insights director Iain Lowrie suggests the frozen food category has faced a challenging year, shaped by rising prices and changing shopper behaviour. “While volume is down 1%, overall value is up 1.3% year-on-year, showing resilience driven by an increase in average price per unit to £4.18⁶,” he says. “This suggests shoppers are buying less but paying more, reflecting inflationary pressures. Frozen seafood, however, has faced sharper headwinds, with value down 2% and volume down 4.6% over the same period⁷. The faster decline in volume versus value suggests that price sensitivity is a key factor, with some shoppers stepping away from the category as the average price per kilogram has risen to £8.35⁸.”

Despite this, Young’s continues to perform well in the category and remains the UK’s No.1 frozen seafood brand by value⁹, he adds. “Frozen seafood plays a central role in broader meal occasions, with shoppers often purchasing complementary items such as starters, desserts, and wine, resulting in a higher basket spend.”

Meanwhile, the frozen potato and plant-based categories have experienced robust growth in the UK retail market, says Charlotte Turton, managing director at Strong Roots. “At Strong Roots, we’ve seen particularly strong value growth in the frozen potato category, particularly in the chips segment, which is driving overall brand performance. Strong Roots Sweet



Potato Fries have delivered an 19.4% increase in value sales year-on-year, alongside a 16.4% rise in unit sales¹⁰,” she says. “With consumers prioritising value, versatility, and sustainability, both frozen potato and plant-based segments continue to outperform broader frozen and chilled categories. In particular, the plant-based frozen category has shifted from niche to mainstream, and is now a key driver of

growth within the freezer aisle.

This year, the company also tapped into the snacking trend with AirBites, a new range created to meet rising demand for quick, wholesome snacks, optimised for the air fryer, she reveals. “Designed for today’s flexitarian shopper, they are bold in flavour, made with real vegetables and ready in less than 10 minutes.”

Meanwhile, Lamb Weston marketing manager Alecia Brown says the UK market has experienced slow but steady economic growth, with the frozen potato and frozen chip sector becoming even more competitive. “With more brands entering the category, fresh consumer-led innovations, and a burst of promotional activity, it has become an even more dynamic and tastier segment¹¹,” she notes. “With 50% of households looking to reduce spend

“With 50% of households looking to reduce spend out of home⁷, retailers have a golden opportunity to bring the restaurant experience into shoppers’ kitchens”



No need for compromise

“The key message for us is that frozen food doesn’t mean compromise,” says Stewart at Pack’d. “In fact, frozen fruit and veg can often be fresher and more nutritious than fresh, as we’re able to capture and lock in all the goodness by picking ripe and then freezing straight away. We need to focus on reframing how people think about frozen food, freezing is one of the most natural preservatives.”

One of the most important messages the frozen food sector must convey is that frozen is not a compromise, agrees Birds Eye’s Sutton. “It’s a smart, modern choice that delivers on nutrition, sustainability, convenience and value. While 63% of UK consumers now recognise frozen can be as nutritious as fresh, only 21% understand it can often be superiorⁱ. That’s a gap we’re determined to close.

“We need to continue educating consumers about

the powerful nutritional benefits of frozen food because freezing doesn’t just preserve freshness, it locks it in. And in some cases, frozen can be more nutritious than fresh.”

McCain Foods’ Collins says the frozen food sector “must continue to champion the message that frozen is not only convenient, but also affordable, high-quality and, increasingly, aligned with modern consumer values. Frozen food offers a dependable way to reduce food waste, plan meals more effectively and always have something delicious on hand,” she notes.

“The frozen aisle has a great story to tell – one of quality, value, and reduced waste,” says Sofina Foods’ Lowrie. “At Young’s, we focus on communicating these benefits clearly, both in-store and online. Our point-of-sale materials, like shelf barkers and freezer signage, help break down barriers to purchase and

highlight key product benefits at the moment of decision.

“We’ve seen strong results from this approach, with brand tracking showing increased intent to purchase following targeted activations. Ultimately, it’s about reminding shoppers that frozen food doesn’t have to be a compromise; the category has smart, sustainable choices that taste great.”

Strong Roots’ Turton says the category needs to challenge outdated perceptions and champion frozen as a smart, forward-thinking choice – one that offers quality, reduces food waste, and supports time-poor, health-conscious consumers. “We’ve designed our packaging to be freezer-friendly and portion-flexible, making it easier for shoppers to make room for nutritious choices they love and can return to again and again without any waste,” she says.

out of home¹², retailers have a golden opportunity to bring the restaurant experience into shoppers’ kitchens.”

This autumn, Lamb Weston is introducing Frenzy French Fries, a triangular french fry with a uniquely curved triangular shape, developed specifically for the oven and, especially, the air fryer.

Indeed, frozen potatoes comprise the biggest savoury frozen sector, valued at £1.3bn and bought by 87% of UK households¹³, says Birds Eye UK & Ireland marketing director Claire Sutton. As such, the company entered into the chips category in July 2024, quickly claiming the spot as the “second-largest frozen chip brand with £14.9m¹⁴ in retail sales in its first year”, she says. The company has recently added Birds Eye Crispy Wedges to the range.

In its more traditional territories of

frozen poultry – the second-largest sector in savoury frozen worth over £1bn and bought by two-thirds (66.5%) of UK households¹⁵ – and frozen fish, worth £999m¹⁶, the company is offering ranges such as its fakeaway-inspired Chicken Shop range and globally inspired options such as its Captain’s Discoveries range, the latter having the aim of driving penetration among shoppers under 45, who typically under-index in the frozen fish category¹⁷, she says.

Sutton also believes that while shopper behaviour over the past year has leaned towards chilled options, particularly ‘dinner for tonight’ missions which favour smaller, more frequent trips and chilled formats, this shift aligns with today’s consumers who are “seeking no compromise” when it comes to health, taste, convenience and value. “It puts frozen in a strong position to

re-establish itself as a vibrant, versatile and modern solution that meets evolving needs with flair,” she says.

At Pack’d the past year has seen brilliant growth for its brand and for the frozen food and veg category as a whole, reports CEO and co-founder Alex Stewart. “We have experienced 35% year-on-year growth and our online sales have doubled, becoming a £1m revenue stream in only three years¹⁸ – telling us that more people than ever are searching for the frozen food they want, both for convenience as well as quality.” The company is looking to hit £10m in turnover by 2027.

In meat-free, meanwhile, Quorn is claiming the top spot in frozen, with its Quorn Mince and Quorn Pieces being the top two frozen meat-free SKUs¹⁹, says head of brands Lucy Grogut.

“We’ve seen a huge shift in consumer

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behaviour over the past 12 months, with many shoppers taking a more mindful approach to the ingredients they consume,” she says. “Our research shows that avoiding artificial ingredients is very important to them¹⁴.” As such, the company has “broken new ground in the category” with its latest launch, which strips back ingredients in its core frozen ingredients range, including Quorn Mince, Pieces, Swedish Style Balls and Strips. “The range is now the first to claim ‘high protein and no artificial ingredients’. This launch is redefining the conversation around meat alternatives with a more positive narrative,” she says.

Affordable, sustainable, healthy

Cost-of-living pressures and the pace of modern life continue to make frozen food a highly relevant choice for today’s shoppers, notes Louise Collier, category development director at Birds Eye UK&I. “59% of UK shoppers say they buy frozen food to help reduce waste²⁰ – a meaningful advantage when budgets are tight and sustainability matters more than ever,” she notes. “Frozen food also offers affordable health, giving families access to nutritious, balanced meals without compromise. Our Steamfresh Meals range is a great example being 100% non-HFSS, high in fibre, and delivering one to two of your 5-a-day per portion.”

Stewart at Pack’d believes the increased cost of living is definitely driving growth generally in the frozen category. “However, we are also seeing growth driven by greater consumer understanding of the benefits that frozen offers – both from a nutritional quality and cutting waste point of view,” he says. “In fact, recent research shows 63% of Brits now recognise that frozen food can be as nutritious as fresh, and 47% buy frozen to reduce food waste²¹.

“More and more shoppers are looking for smart, sustainable solutions that fit their lifestyle,” he adds. “Frozen fruit and vegetables help consumers cut down on waste, have an on-hand convenient source of produce and still get all of the nutrition they would get from fresh.”

Value for money does remain a top consideration for consumers, says Quorn Foods’ Grogut. “When recently asked about their key diet drivers and shopping habits, 33% of respondents



told us that health and wellness is a more important concern, while 20% of respondents said cost of living was a more important concern²²,” she reveals. “This is a big change from November 2022, when just under 60% of respondents said cost of living and 10% of respondents said health and wellness²³. We can see that households are looking to balance the importance of cost and health and wellness, now prioritising both nearly equally.”

That said, convenience is also high on the agenda, she notes, adding that frozen ingredients will always have a

huge role to play in the category when it comes to having a quick and easy choice with longer shelf life.

While frozen seafood has seen a decline in volume, the cost-of-living crisis and busy lifestyles remain strong forces shaping consumer behaviour, says Sofina Foods Europe’s Lowrie. “These pressures continue to play to the strengths of frozen, offering longer shelf life, reduced waste, and a reliable value for money.

“Convenience is also a key factor as shoppers increasingly want meals that are quick to prepare,” he says. “We’re also seeing a rise in air fryer usage, particularly for coated fish products.”

The ongoing cost-of-living pressures and increasingly time-poor lifestyles continue to drive shoppers toward the frozen aisle, agrees Strong Roots’ Turton. “Consumers are demanding maximum value without compromise on health, taste and sustainability,” she says. “Frozen food delivers all three: extended shelf life, portion flexibility

“From globally inspired ready meals to better-for-you frozen snacks, we see opportunity that helps shoppers break away from ‘just chips and peas’”



Opportunities for development

“Shoppers are looking for more than just the basics,” says Strong Roots’ Turton. “The real opportunity lies in mirroring chilled innovation with frozen benefits. There’s a clear gap for products that feel modern, global, health-conscious, and flexitarian.”

“From globally inspired ready meals to better-for-you frozen snacks, we see opportunity in formats and flavours that help shoppers break away from ‘just chips and peas’. Consumers want convenient foods that feel fresh, exciting and aligned with modern eating habits – especially in the plant-based space.”

Stewart at Pack’d notes: “There is a clear gap in the frozen category when it comes to nutrition, health and wellness. The frozen aisle has traditionally been overlooked in these areas, despite the fact

that freezing whole foods at peak ripeness often preserves nutrients better than fresh alternatives and can often offer better value. Many frozen meals and dishes also require less preservatives than fresh. While consumer understanding of this is definitely increasing, there’s an opportunity to further educate consumers and communicate that the freezer can be the destination for great nutritious food.”

While traditional staples like chips and jacket potatoes continue to perform strongly and offer comfort and reliability, there is a growing appetite among consumers for more adventurous and diverse options – especially those that reflect the innovation seen in the fresh and chilled sectors, says McCain Foods’

Collins. “We see clear opportunities to bridge this gap by introducing frozen products that offer elevated flavour profiles, global cuisines, and formats that cater to modern lifestyles. Consumers are increasingly seeking convenient solutions that don’t compromise on taste or experience, and they’re more open than ever to trying new combinations.”

“That said, staples still play a vital role. Many households rely on frozen food for its reliability, value, and reduced waste. The key is balance – offering both the comfort of tradition and the thrill of innovation. For retailers and wholesalers, this means curating a frozen range that reflects evolving consumer behaviours while maintaining core favourites that drive repeat purchase.

and reduced waste, making it a smart, sustainable choice for busy households.

“But convenience alone isn’t enough; shoppers are increasingly mindful of how their food is made. As shoppers become more intentional, both financially and environmentally, frozen food is no longer seen as a fallback, but as a forward-thinking choice.”

How in-store can evolve

The frozen aisle still holds “massive untapped potential” according to Strong Roots’ Turton. “It’s too often relegated to the back of the store and viewed more as a stock-up zone rather than a discovery zone,” she says. “Frozen foods deserve to be positioned as part of everyday meal planning, health, and convenience. We believe in making the aisle more dynamic, vibrant and experiential. This could include cross-merchandising with health and wellness, better signage, seasonal recipe bundles, and even freezer-top POS campaigns.”

Sofina Foods’ Lowrie believes that, too often, the frozen aisle is underutilised, positioned only as a functional destination with limited inspiration. “This reinforces the perception of frozen as a ‘grab-and-go’ category rather than a place to browse, discover, or plan meals,” he says. “Many shoppers find the aisle cold, clinical, and difficult to navigate which can discourage exploration and limit impulse purchases.

“By making the aisle more dynamic and occasion-led, we can shift perceptions and drive engagement,” he adds. “Promotional ends, for instance, could combine high-volume staples with more innovative products to create compelling meal solutions. Think ‘Fish & Chips night’, ‘Family Teatime Favourites’, or ‘Date Night In’ – these encourage shoppers to build a basket around a frozen centrepiece.”

Birds Eye’s Collier agrees that with frozen food long positioned towards the back of store layouts, this can

limit visibility, especially for top-up shoppers who may not plan to visit the aisle unless frozen is already on their list. While repositioning the category closer to the entrance would be ideal, it’s not always feasible, so smart merchandising and promotional strategies come into play. “Our research shows that 67% of shoppers, and 77% of Gen Z, find occasion-led merchandising, such as frozen meal deals, highly appealing²⁴,” she says.

“The frozen aisle often feels cold and uninviting, causing shoppers to rush through and overlook innovations compared to ambient aisles,” observes Lamb Weston’s Brown. “Shrinking frozen feature space further limits opportunities for new brands to gain visibility and capture share. In Europe, retailers are finding ways to bring frozen products beyond the aisle. For example, in Italy we’ve activated the Lamb Weston brand through fully branded chest freezers during key promotional periods. Placing

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these freezers near complementary categories, such as chilled chicken and burgers or condiment displays creates cross-selling opportunities, adds extra purchase points, and encourages trial.”

Traditional store layouts often position frozen foods towards the back of the store, agrees Pack’d’s Stewart. However, he notes the driving frozen food growth also lies in using online shopping experience and digital content. “Online platforms allow consumers to discover inspirational recipe content and gives them more time to explore the frozen aisle at their own pace to really understand the benefits of frozen products,” he says. “We’ve seen this work particularly well through our own website, as well as through retailers like Ocado and Amazon, where people can study the product and indulge in recipe content, and product suggestions help attract shopper attention and drive category growth.”

The message to retailers

“Frozen food is one of the markets where there is a great deal of innovation, improvements in sustainable practices and changing consumer behaviours,” says Stewart at Pack’d. “Shoppers are looking for convenience now more than ever and they want purpose-driven brands and healthier options while not sacrificing taste. Frozen is a perfect solution for these challenges. At Pack’d we see great opportunity in the freezer aisle.”

“Tap into the opportunity to bring incremental year-round occasions and a younger, more affluent shopper to the category through stronger navigation online and in-store, disrupting the consumer’s path to purchase,” advises Little Moons’ Farquhar. “This offers the opportunity to increase the percentage of frozen snacking occasions from 3.7%²⁵ in 2024 to 5% in 2026.”

Quorn Foods’ Grogut thinks retailers should pay close attention to changing

consumer habits and adapt ranges accordingly. “Shopper trends are constantly evolving but creating a range that taps into those current key drivers – such as nutrition, convenience and value – will be what supports growth in the category, keeping existing shoppers happy, whilst bringing in new ones.”

Frozen food is one of the most exciting and under-leveraged opportunities in grocery right now, maintains Birds Eye’s Collier. “With 63% of shoppers recognising that frozen can be just as nutritious as fresh²⁶ and 60% saying they can’t live without their freezer²⁷, the appetite is there. The category is evolving fast, driven by consumer demand for health, convenience, global flavours and sustainable choices. Frozen food is ready for its next chapter... smart promotions that highlight value and versatility, occasion-led merchandising that makes the category easier to shop, and in-store theatre that brings frozen to life.”

Don’t underestimate the role branded innovation plays in attracting new shoppers and reinvigorating the aisle, says Sofina Foods’ Lowrie. “While traditional staples have their place, relying on them limits the category’s potential. Shoppers already loyal to frozen will continue to buy those core products, but if we want to expand the category, we need to offer something new. That means thinking carefully about the role each product plays. Is it fulfilling a need, creating an occasion, or offering a reason to explore?”

“If frozen continues to be treated as the last stop on the shop, it will remain just that. But with innovation, storytelling and merchandising, frozen can become a destination in its own right – one that delivers value, inspiration and incremental growth.”

“Shoppers are looking for convenience now more than ever, and they want purpose-driven brands and healthier options while not sacrificing taste. Frozen is a perfect solution for these challenges”

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No need for compromise

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Snack time just got sweeter

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Little Moons has had a big impact on its category, disrupting norms and pioneering frozen snacking, a category now worth £124m¹, says Ross Farquhar, director of marketing, innovation & sustainability. “In an ice cream aisle traditionally rooted in a single occasion – dessert – and focused on children and older shoppers, Little Moons’ bite-sized mochi ice cream introduced a new snacking format, bringing new occasions and a broader shopper base to the category,” he notes.

Earlier this year, Little Moons revealed a new bold, playful brand world, designed to expand relevance beyond frozen desserts and compete with the biggest names in snacking. “We are focusing our marketing investment on establishing Little Moons in everyday snacking occasions,” says Farquhar.

With innovation central to growth, Little Moons is bringing key ambient snacking flavours into its portfolio. In July, it launched Brown Butter Caramel,



“We are focusing our investment on establishing Little Moons in everyday snacking”

a 2025 standout flavour trend, blending smooth caramel gelato with chocolate-covered caramel pieces, wrapped in its signature mochi dough. This month, Chocolate Fudge joined the line-up, pairing velvety milk chocolate ice cream with non-dairy fudge pieces.

With the snacking category projected to top £30bn² by 2030, the brand plans to grow its share of snacking occasions.

Source¹ Circana, Total Take Home Ice Cream, 52 w/e 16.02.25² Euromonitor

sweeter
snacking
starts in the
freezer



The UK's
#1 Bitesize
Ice Cream
Brand

Source: Circana, Total Market, Value Sales, 52 w/e 11.05.2025

Potato pioneers for 40 years

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– Cheese & Bacon Potato Skins
– Cheese & Jalapeño Potato Skins
– Cheese & Onion Potato Skins
– Farmer's Roasting Potatoes
– Hasselback Baked Potatoes

➡ This year is a big one for the Bannister family. It marks 40 years since they started baking and freezing potatoes – pioneering a product that saves potato-lovers time, money and food waste.

A farm diversification story

Back in 1985, the Bannisters expanded their farming business from growing the very best potatoes and supplying them into the fresh London markets, further into the food chain. At that time, storage of fresh produce could be tricky, so towards the end of the season, quality issues were evident. In a bid to solve them, and to add value to their crop, Rob Bannister's lightbulb moment was to bake and freeze the potatoes. Together with his wife, Hilary, Bannister founded Farmhouse Potato Bakers and began baking and freezing potatoes grown on their farm to preserve the best of the crop and create availability all year round. The ready-baked frozen jacket potato was born!

First supplied into hospitality, Bannisters were the first to launch frozen jackets into the supermarket freezer aisles in 2007. This mealtime saviour has grown a large and loyal customer base who love a jacket potato but don't have time to bake them from scratch. Social media wasn't around in 1985, but it has since helped to catapult the humble baked jacket potato back



“We’ve built a much-loved brand and developed a range of fantastic products. Every single detail counts, from sourcing the best British potatoes to baking them to taste as good, if not better, than homemade”

to the top of the culinary agenda for today's shoppers.

This year, the team at Bannisters are celebrating 40 years since Rob and Hilary first embarked on the venture. Daughters, Zoe and Marie, are now at the helm as joint managing directors. Zoe Bannister comments: “The business has grown, we’ve built a much-loved brand and developed a range of fantastic products including roasting potatoes, hasselbacks, loaded potato skins and filled jacket potatoes. And we’re still proudly independent. Every single detail counts, from sourcing the best British potatoes to baking them to taste as good, if not better, than homemade.

“As we celebrate four decades of sourcing, selecting, baking and freezing the best British potatoes, our focus continues to be on growing the business into the future, with plenty of exciting plans and products in the pipeline.”

An art, not a science

With the family still growing crops on the Yorkshire Wolds, Bannisters is a unique business in the frozen sector.

“Baking potatoes is an art, not a science, so our years of experience throughout the food-to-fork journey mean we are well-positioned to supply the best and tastiest frozen potatoes,” says Marie Medhurst. “So, for shoppers, who love the humble jacket potato now more than ever, the message is loud and clear – Bake it Bannisters!”

Bake it Bannisters!



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or call us on 01262 605650



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Birds Eye
Aunt Bessie's
Goodfella's

 Frozen food has long been a staple in UK households, with 60% of adults saying they can't live without their freezer¹. Yet despite its convenience, value, and ability to reduce food waste², frozen food is still often seen as less inspiring or nutritious than fresh. Birds Eye is on a mission to change that. Its new campaign, 'That's a Recipe For a Life Well Fed' reframes and celebrates frozen as a modern source of nourishment, joy and connection.

Championing frozen's goodness

At the heart of the campaign is a clear, powerful purpose: to make mealtimes better through the goodness of frozen. Through playful 'recipes' like 'Perfect Pappardelle' and 'Waffly Versatile Cottage Pie', Birds Eye shows how it fits seamlessly into real life. Claire Sutton, marketing director at Birds Eye UK & Ireland, explains: "'That's a Recipe for a Life Well Fed' isn't just a tagline, it's a manifesto for modern mealtimes where frozen food isn't just about convenience anymore. It's about confidence, creativity, care and quality."

With a portfolio of over 100 products, Birds Eye is helping families rediscover frozen food as a primary source of inspiration and, importantly, nutrition, notes Sutton. And data supports this: over 94% of Birds Eye's UK sales come from healthy or non-HFSS foods; it has achieved a 100% score on the Dow Jones Sustainability Index for Health and Nutrition for six consecutive years, far above the industry average of 15%; and, in 2024, Birds Eye and Aunt Bessie's products added more than 457m portions of vegetables to plates across the UK³.

One area where Birds Eye is aiming to make a real impact is fish consumption, an ongoing dietary challenge in the UK, reveals Sutton. "By offering everything from Omega-3 fish fingers to globally-inspired options like the new Captain's Discoveries range, Birds Eye believes it can make it easier for families to include fish in their diets," she says.



“‘That’s a Recipe for Life’ is a manifesto for modern mealtimes where frozen food isn’t just about convenience anymore. It’s about confidence, creativity, care and quality”

Innovation that inspires

The campaign marks a creative reset for Birds Eye as it moves from product-specific messaging to a unified Masterbrand approach. With its core categories under one creative umbrella, it is building a consistent identity, strengthening consumer interaction and driving long-term impact.

Innovation is also key to capturing shoppers' imagination. Its Chips range, launched in 2024, has already made Birds Eye the second-largest frozen chip brand in the market⁴; its Captain's Discoveries range brings new flavours to the fish category; and the relaunch of Chicken Shop drove a 60% increase in volume sales in the first half of 2025, tapping into a Gen Z audience⁵.

"That's a Recipe For a Life Well Fed is a celebration of the everyday greatness frozen food enables," adds Sutton. "Birds Eye is inspiring families to see their freezer not as a backup, but as a gateway to better meals, better nutrition, and better living."



Source

¹ Nomad Foods Frozen in Focus 2025 Report: <https://www.nomadfoods.com/wp-content/uploads/2025/06/frozen-in-focus-nomad-foods.pdf>

² Nomad Foods Frozen in focus report: 59% believe it helps reduce food waste, thanks to longer shelf life and portion flexibility

³ Based on 80g portion size

⁴ Nielsen, Dataset 20.06.25

⁵ Nielsen IQ, Retail Measurement, Birds Eye Chicken Shop, L52w w/e 14.06.25



That's a recipe for a
life well fed



BirdsEye

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Tastemaker and innovator

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t: 01945 468 800**KEY CONTACTS****Alecia Brown**
Marketing Manager
Lamb Weston**KEY BRANDS****Lamb Weston**

Since launching in UK retail last year, Lamb Weston's range of skin-on frozen fries has injected fresh excitement into the category, says marketing manager Alecia Brown.

With 75 years at the forefront of potato product innovation, Lamb Weston has a legacy of shaping trends and tastes, she notes. "The brand was the first to patent the curly fry cutting technique, creating the Original Twister Fries in 1983, a product that has transformed restaurant menus and home dining alike, becoming a global fry icon."

Lamb Weston has a proud history of innovation in the foodservice industry and in potato product manufacturing, including designing innovative retail packaging made from 60% used frying oil, a more sustainable option, reducing CO₂ emissions by 30%¹.

2024 saw Lamb Weston bring fresh innovation to the frozen aisle with the launch of a bold supermarket range dedicated to shaped potato products. Highlights included Lamb Weston Potato Dippers, a unique straight-cut chip designed for easy dipping, developed in response to consumer demand for a convenient potato shape suited for snackable moments. The range also featured Waffle Fries – skin-on latticed fries that add variety to mealtimes, whether that's switching up the game on the classic fry-up, dialling up the flavour in a chip butty or adding a twist to dinnertime creations.

"This autumn, Lamb Weston is again reimagining what a French fry can be," says Brown. "New Frenzy French Fries blend the irresistible crispiness of a fry outside with the velvety fluffy potato goodness of a chunky chip inside. Its patented triangular cut is engineered for optimal airflow, promising the perfect crispy bite straight from the air fryer or oven. With air fryers now in half of UK households, and ownership forecast to grow annually by 9.77% (CAGR 2025-2030)², frozen potato and chips brands must evolve to meet this shift in cooking culture. Frenzy French Fries are designed to do just that."

Backed by a bold money-back guarantee campaign supported with an all-out through-the-line marketing



“Our new Frenzy French Fries blend the irresistible crispiness of a fry outside with the velvety fluffy potato goodness of a chunky chip inside... promising the perfect crispy bite straight from the air fryer or oven”

push, Frenzy French Fries joins the Seasoned Twister Fries & Seasoned Waffle Fries in holding the European Superior Taste Award – proving that potato innovation drives flavour, fun, and category growth.

Beyond innovative cut and texture, Lamb Weston has also brought fresh excitement with social media recipes, influencer collaborations, and exclusive press events such as the Chippy Tea, a celebration of chip classics with a fine-dining twist. From Potato Dipper-topped pies to indulgent loaded fry sharers, Lamb Weston positions frozen chips not as a simple side, but as a mealtime main ingredient.

"For families, foodies and fry fanatics, Lamb Weston's frozen chips range brings a new twist to mealtimes," says Brown. "With shaped and speciality fries like curly and waffle fuelling 4.9% frozen chip growth³, Lamb Weston's Frenzy French Fries are set to keep this momentum sizzling."

Source

- ¹ Mass balance approach
² Statista Market Insights, Feb 2025
³ Nielsen, Frozen Chips database, last 26 wks to 12.07.25 (frozen chips brand vs private-label total & sub-category value & volume sales)



DRIVE CATEGORY INNOVATION IN THE FREEZER AISLE



Lamb Weston, leading frozen potato
innovation for 75 years

Already available at

ASDA

Morrisons

Iceland

Bold innovation spurs growth

DETAILS

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KEY CONTACTS

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CEO and Co-Founder
Katy Hamblin
Marketing Director
Mitch Lee
Senior National
Account Manager

KEY PRODUCTS

PACK'D
– Organic Blueberries,
300g
– Organic Strawberries,
300g
– Organic Chopped
Spinach, 450g
– Ripe and Chopped
Avocado, 300g
– Smoothies, 4 x 120g

➡ Pack'd, one of the leading challenger brands in the frozen food space, is proving that frozen can be fresh, nutritious and full of flavour. With a mission to source the best organic produce that makes people genuinely excited about using real ingredients, simply, sustainably and straight from their freezers, the brand has just announced a record-breaking year and shows no sign of slowing down.

At the heart of the brand's growth is a focus on innovation. Over the past 12 months, it has concentrated on expanding its offering of organic fruits and vegetables, launching seven new SKUs on Ocado. "Every addition caters to consumers looking for quick yet delicious and healthy food options," says Alex Stewart, CEO and co-founder.

Beyond fruit & veg, Pack'd continues to innovate in other spaces, moving into the frozen ingredients category with new launches such as chopped Organic Onion, Garlic, and Soffritto. "We want to provide convenience without compromising on taste, nutrition and freshness. People are cooking more of their meals from scratch and we want to help elevate their culinary creations while effectively being an extra pair of hands in the kitchen – like having a sous chef in the freezer," says Stewart.

Building on core strengths

Pack'd will continue to expand its product range and listings, with the goal of doubling turnover by 2027. Upcoming plans will build on the brand's core pillars of quality, simplicity and sustainability as it expands into new product categories to have more



“With the goal to provide convenience – without compromising on taste, nutrition and freshness – our innovation reflects consumer shifts towards quick/scratch cooking and ways to make mealtimes simpler”

presence across various occasions. "Frozen is synonymous with cheap and uninspiring – we want to turn that on its head and make frozen the go-to place for excitement and inspiration," notes Stewart.

Pack'd has already achieved a first in the UK freezer aisle, with award-winning, kerbside-recyclable paper packaging that also reflects its commitment to sustainability. In the last year the brand has saved over 20 tonnes of plastic. In an industry-leading move, it earned The Grocer's Packaging Award for Paper Pack of the Year 2024.

High quality for busy lifestyles

With growing interest in plant-based, clean-label, and premium frozen foods, Pack'd recognises the opportunity within the frozen category. Its current offerings mark just the beginning, as the brand continues to develop high-quality options tailored to busy lifestyles.

Looking ahead to the next six months, Pack'd is set to launch new products, secure additional retail listings, and lead conversations around food waste, sustainability, and the advantages of frozen food.





PACK'D

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at Source



Soil Association
Certified



Kerbside Recyclable
Paper Packaging

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*North Star powered by Circana, All outlets, Manufacturers driving growth, Frozen Desserts latest 52 weeks to w/e 12th July 25, vs. last year, value sales. Range by outlet may vary.

Healthier meat-free nutrition

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Lucy Grogut
Head of Brands

KEY BRANDS

Quorn

Quorn is proud to be the global meat-free market leader¹ and that hasn't happened by accident, says Lucy Grogut, head of brands at Quorn Foods UK. "Our passion for the meat-free category is backed by a clear purpose and a bold vision for the future," she says. "We have been pioneering in alternative protein for over 40 years, and today's consumers expect more: great taste and greater transparency, as well as trusted nutrition. We've listened, and we're raising the bar again with our first range to carry the claim 'high in protein with no artificial ingredients'."

Artificial ingredients removed

With all artificial ingredients removed, Quorn's most popular vegetarian products began rolling out in all major retailers in August – Quorn Mince, made with just four simple ingredients and Quorn Pieces, made with just three simple ingredients (300g RRP £2.60*, 500g £3.65*). Quorn Swedish Style Balls also joined the range and Strips, which already included no artificial ingredients, will proudly carry the claim on its new-look packaging.

Following up on healthy nutrition

Backed by a major campaign launching in October, the brand is set to drive incremental growth by appealing to a growing segment of ingredient-conscious shoppers seeking a tasty and healthy option, notes Grogut.

"Consumers love Quorn, we're the top meat-free brand in frozen with the highest penetration²," she says. "However, the category is evolving;



“Today’s consumers expect more: great taste, greater transparency, and trusted nutrition. We’re raising the bar again with our first range to carry the claim ‘high in protein with no artificial ingredients’”

53% of UK consumers say healthy nutrition has become more important to them in the last five years³, and some shoppers are increasingly conscious of the ingredients in their favourite foods.

"Our high protein with no artificial ingredients range will positively influence that conversation. We've got decades of food science behind us – and this is our most simple and nutritious range yet."

Cutting through the noise

"Quorn Foods UK has always said that the nutritional benefit of a food remains the most important factor in whether a product is healthy or not," adds Grogut. "And we have extensive evidence on all our products to support their place in the market. For us at Quorn Foods UK, it's simple – good nutrition is what makes food healthy. With this launch, we're cutting through the confusing noise and leading a new, positive narrative for the category."

"Quorn's new range provides planet-friendly, simple ingredient products that deliver tasty and nutritious swaps for the meals consumers know and love. Quorn continues to lead by offering better choices for consumers, retailers and the planet."

High protein with no artificial ingredients. So tasty, why choose the alternative?

**Source**

^{1,2} NIQ Panel, Total GB, 52 w/e 12.07.25, Quorn Foods Defined Meat Free Universe
³ NIQ Global Health & Wellness Survey 2025, Q: Are you following items more, or less, important to you now than they were five years ago? – Healthy Nutrition (i.e. What I eat & drink)

* RRP set at the discretion of individual retailers

Our bestsellers just got even better...

High protein with
no artificial ingredients



*Quorn Mince is the number 1 product in Frozen Meat Free - NIQ Sales Value 52we - 12.07.2025.

Inspiration to choose frozen

DETAILS

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KEY BRANDS

Young's
Gastro
Chip Shop

As the UK's No.1 frozen seafood brand¹, Young's continues to bring excitement and innovation to the frozen aisle, attracting new shoppers, reinvigorating the category, and delivering growth through quality, convenience, and consumer-led NPD.

While the frozen category has faced headwinds in recent months, frozen fish is well placed to meet the needs of today's shopper, with its versatility, health credentials, and ability to deliver delicious meals with minimal waste. But to truly unlock growth, brands and retailers must go beyond traditional staples and inspire shoppers to visit the frozen aisle. To do this, Young's is creating new occasions for frozen fish and tapping into emerging trends, says category insight director Iain Lowrie. "Our Taste of Asia range is a standout example," he says. "Inspired by the bold, authentic flavours of south-east Asia, it has brought much-needed excitement to the category. Since launch, it has delivered £4.6m RSV, attracted 88,000 new shoppers to frozen seafood, and reached a younger demographic, with nearly 1 in 4 buyers under 45². Over 1.2m shoppers have now bought into the range, with 383,000 new to the brand³ – a clear sign that innovation can drive longer-term category growth.

"We're also seeing success through premiumisation and the growing popularity of at-home 'fakeaways'," adds Lowrie. "Our Chip Shop brand, now worth £52.3m and growing in both value (+5.1%) and volume (+7.4%)⁴, continues to deliver on this trend. This year's launch of Chip Shop Jumbo Cod Special – a larger, higher-quality natural fillet in a takeaway-style – has brought in 94,000 shoppers, 57% of



“At Young's, we are creating new occasions for frozen fish and tapping into emerging trends”

whom are new to the brand and 5% new to frozen seafood altogether⁵. It shows the power of high-quality, indulgent formats to drive incrementality, and we're looking to build on this with new launches later this year.

"We've also extended our innovation in breaded fish, launching Young's Breaded Fish with Flavour in Garlic & Herb and Paprika & Pepper," he notes. "These modern twists on classics are designed to appeal to younger shoppers and bring new energy to the category.

"Meanwhile, we've relaunched our Scampi portfolio, with updated recipes to improve quality and flavour. This has helped the Gastro Scampi range grow both its value (+1.8%) and volume share (+1.6%) of the scampi category⁶, and our Gastro Jumbo Wholetail Scampi has been recognised with a Great Taste Award.

Looking ahead, Young's remains focused on bold flavours, new formats, and accessible innovation, says Lowrie. "Building on our 200+ years of seafood expertise, Young's will continue showcasing how frozen fish can be more versatile, exciting and relevant to today's consumers, one delicious fish dish at a time."



Source

¹ Nielsen, 52 w/e 12.07.25

^{2,3} Kantar, March 2025

⁴ Nielsen, 52 w/e 12.07.25

⁵ Kantar, April 2025

⁶ Nielsen, 52 w/e 12.07.25.



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BIGGER



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NEW JUMBO FISH SPECIAL
A WHOPPER OF A FISH FOR WHOPPING SALES



*Source: Nielsen Frozen Fish 52 weeks
12th July 2025

Young's – a brand of Sofina Foods

Leading the rise of real, veg-first food

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KEY CONTACTS

Charlotte Turton
Managing Director

KEY BRANDS

Strong Roots

➔ Strong Roots was founded on a simple idea – that food can be better, says Charlotte Turton, managing director of the company. “Ten years on, our mission to fix the freezer aisle resonates more than ever as we celebrate a decade of growth, flavour and purpose-driven innovation,” she says. “It’s no wonder consumers across the UK and Ireland choose Strong Roots; it’s the go-to for plant-based meals that are big on flavour, wholesome and ready in just minutes.”

Redefining freezer staples

At the heart of this success is one product that has captured the appetites and loyalty of UK and Irish shoppers alike – Strong Roots Sweet Potato Fries. Crowned the UK and Ireland’s No.1 selling sweet potato fries¹, the brand is a firm favourite in UK households. “They aren’t just another frozen side – they’ve helped redefine how consumers think about freezer staples,” says Turton. “From defining the category in 2016, to selling over 7.5m² packs across the UK and Ireland in this year alone, the brand is proving that veg-forward food can be both delicious and convenient. Made with simple, natural ingredients, they’re wholesome, low in saturated fat and gluten-free.”

This September, the company plans



“Strong Roots Sweet Potato Fries aren’t just another frozen side – they’ve helped redefine how consumers think about freezer staples”

to launch a bold new campaign to celebrate its iconic Strong Roots Sweet Potato Fries as the ultimate sidekick for modern mealtimes. Backed by a £730k investment, this spans high-impact out-of-home (OOH) activations and platform-native social media content, targeting high-intent audiences.

“With a confident, creative platform, anchored in ‘No Competition’, the campaign brings wit, warmth and cultural relevance to showcasing real food made from real ingredients,” notes Turton. “Our strategy reflects how consumers now eat – socially engaged, time-pressed and increasingly plant-curious. Whether it’s geo-targeted TikTok content or dynamic POS displays outside major retailers, we’re reaching shoppers in the right places, at the right moments, with the right message.”

Keeping shoppers coming back

In-store, Strong Roots’ bold, modern packaging stands out, with a visual identity that heroes veg in all its colourful, craveable glory, says Turton. “But it’s our consistency – in quality, taste and purpose – that keeps shoppers coming back. As a certified B-Corp, we offer simple, sustainable food made from vegetables you can recognise and ingredients you can pronounce.

“Looking ahead, there’s a huge opportunity to premiumise frozen vegetables and sides by putting veg first, as the foundation of the plate. As Strong Roots marks 10 years, we’re more energised than ever to lead the next chapter of frozen – rooted in simplicity, sustainability and delicious veg-first food.”

Source

¹ Circana (UK) Ltd, Market Advantage, UK, Frozen Chips by Product, Sweet Potato, Value Sales, 52 w/e 26.04.25; NIQ RMS data for Frozen Food, Ireland Total Scantrack, 52 w/e 18.05.25

² Circana (UK) Ltd, Market Advantage, UK, Total Store By Category, Strong Roots, 52 w/e 17.05.25; NIQ RMS data for Frozen Food, Ireland Total Scantrack, 52 w/e 18.05.25





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