

# British Frozen Food Federation



*You can be sure it's fresh – it's frozen*

## FROZEN FLAT IN THE RESTAURANT SECTOR

The latest data kindly supplied by Peter Backman of Horizons FS Ltd. for the restaurant sector shows that frozen is worth almost £1.1 billion. The quick service restaurant is much more important to frozen than the full service restaurant sector with 86% of the frozen spend being within the QSR sector.

Despite the onset of the recession in 2009 the number of outlets in these two sectors has grown in 2006. The numbers in fact have grown by 1,800 in the three years to 2009 and a considerable part of the increase has come from sandwich and coffee shops.

Consumers are eating out slightly less often in 2009 compared to 2006. Full service restaurants have suffered a little more than the quick service restaurants with their meal numbers being down 4.1% compared to QSR down by 2.8%.

The share of food within the restaurant sector for frozen is just under 28% and has remained virtually constant for most of the last five years.

**If you would like to know more about this sector or delve deeper into the statistics please contact Peter Backman of Horizons FS Ltd. on Tel: 020 8349 0162.**

# BRITISH FROZEN FOOD FEDERATION



Source: Horizons FS Ltd.

## FOCUS ON FOODSERVICE 2006 & 2009 COMPARISON FULL SERVICE & QUICK SERVICE RESTAURANTS

### FOOD PURCHASES

Food Categories	QUICK SERVICE RESTAURANTS (QSR)	FULL SERVICE RESTAURANTS	TOTAL
	2009 £ millions	2009 £ millions	2009 £ millions
Frozen	940	154	1,094
Chilled - Long Life	189	241	430
Chilled - Short Life	533	885	1,418
Ambient	628	389	1,017
<b>Total</b>	<b>2,290</b>	<b>1,669</b>	<b>3,959</b>

### GENERAL INFORMATION

Information Categories	QUICK SERVICE RESTAURANTS (QSR)			FULL SERVICE RESTAURANTS			TOTAL		
	2006	2009	Percentage Gain/Loss	2006	2009	Percentage Gain/Loss	2006	2009	Percentage Gain/Loss
No. of Outlets	30,048	31,042	3.3	26,700	27,502	3.0	56,748	58,544	3.2
No. of Meals Served - Millions	2,058	2,001	-2.8	754	716	-5.0	2,812	2,717	-3.4
Total Food & Drink Sales - £ millions	10,082	10,151	0.7	8,727	8,616	-1.3	18,809	18,767	-0.2

Source: Horizons FS Ltd. For further information, contact Peter Backman, Horizons FS Ltd. Tel: 020 8349 0162

Web Site: [www.horizonsforsuccess.com](http://www.horizonsforsuccess.com)

Please note that the information in this report is based on initial estimates which require final confirmation.

## FOODSERVICE MARKET

### RESTAURANT SECTOR 2006 TO 2009 FULL SERVICE & QUICK SERVICE RESTAURANTS

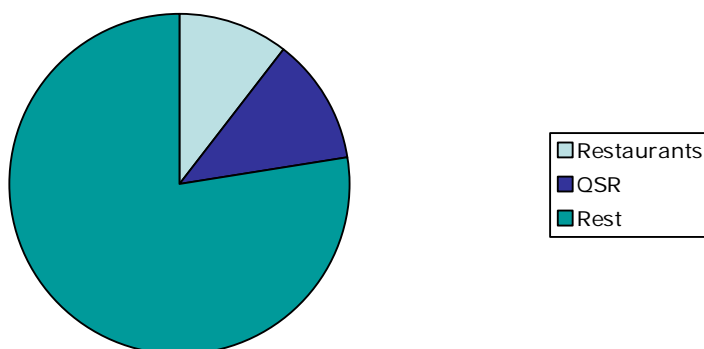
#### OUTLETS

	2006	2009
Restaurants	26,700	27,502
QSR	30,048	31,042
TOTAL	56,748	58,544

Source: Horizons

- Despite the onset of the recession in 2009, the numbers of outlets in these two sectors have grown since 2006
- Restaurants – full service plus quick service – account for 21% of all outlets
- Numbers grew by 1,800 in the three years to 2009
- A considerable part of this increase has come from the quick service sector especially sandwich and coffee shops

Number of outlets: 2009



## FOODSERVICE MARKET

### RESTAURANT SECTOR 2006 TO 2009 FULL SERVICE & QUICK SERVICE RESTAURANTS

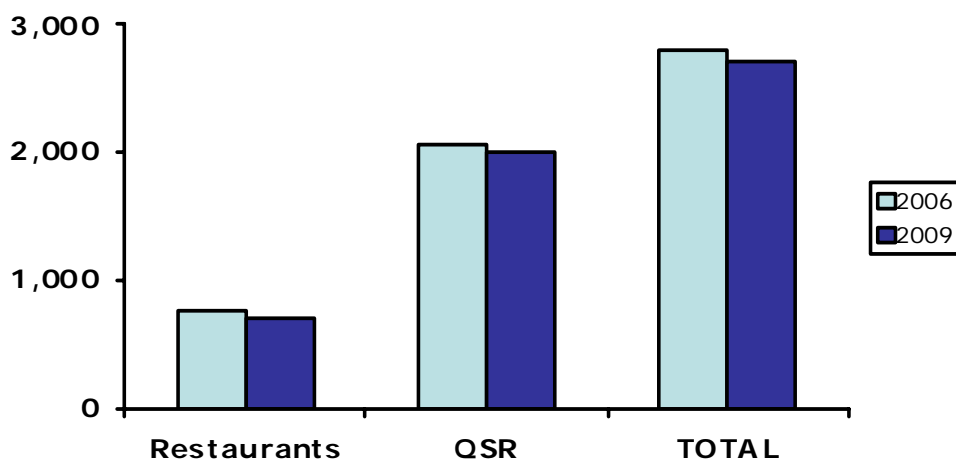
#### MEALS

	Millions	Millions
	2006	2009
Restaurants	754	716
QSR	2,058	2,001
TOTAL	2,812	2,716

Source: Horizons

- Consumers ate out slightly less often in 2009 compared with 2006
- Quick service outlets, where meals fell by -2.8% in the three years to 2009, did not suffer as much as full service restaurants where the fall was -4.1% although the decline in meal numbers was less

#### Meals (Millions): 2006 - 2009



## FOODSERVICE MARKET

### RESTAURANT SECTOR 2006 TO 2009 FULL SERVICE & QUICK SERVICE RESTAURANTS

#### FOOD PURCHASES – 2006 to 2009

£ Millions

	Total 2006	Total 2009	Ambient	Chilled - long life	Chilled - short life	Frozen
Restaurants	1,795	1,670	389	241	885	154
QSR	2,454	2,289	628	189	533	940
<b>TOTAL</b>	<b>4,249</b>	<b>3,960</b>	<b>1,017</b>	<b>430</b>	<b>1,418</b>	<b>1,095</b>

Source: Horizons

- Food purchases fell by 7% in inflation adjusted terms compared with 2006 although it grew when measured at current prices
- Frozen food accounted for 9% of all food purchased by restaurants in 2009
- The percentage was 28% in quick service outlets where frozen products, such as fries and burgers, are mainstream volume purchases
- Chilled-long life foods accounted for 11% of purchases in this sector and fresh foods (chilled-short life) were 36% of the total

## FOODSERVICE MARKET

### RESTAURANT SECTOR 2006 TO 2009 FULL SERVICE & QUICK SERVICE RESTAURANTS

#### FOOD & DRINK SALES

£ Millions

	2006	2009
Restaurants	8,727	8,616
QSR	10,082	10,151
<b>TOTAL</b>	<b>18,810</b>	<b>18,767</b>

Source: Horizons

- Restaurant sales fell marginally in the three years to 2009
- Full service restaurants fell by -1.3% over the period
- Quick service grew by +0.7% over the period and indicates that this sector was able to trade well during the severe downturn seen by other sectors in 2009

For full definitions of these sectors go to Horizons website  
[www.horizonsforsuccess.com](http://www.horizonsforsuccess.com) and click on "Detailed definitions"