



## RETAIL CRASHES THROUGH THE £5 BILLION MARK

The latest market data from TNS Worldpanel for the 52 weeks ending 14<sup>th</sup> June 2009 shows that the retail frozen food market has burst through the £5 billion barrier and is now worth just under £5.1 billion. The market is now growing in value by 6.3% year on year with all nine product categories showing value growth.

Savoury food continues to lead the charge with a very impressive 11.2% year on year growth whilst volume has grown by 4.3%. The category includes cooked poultry and processed poultry as well as savoury bakery and vegetarian products so it is a little difficult to draw very specific conclusions but obviously it is a market enjoying a fabulous growth rate.

Meat and poultry continues to show outstanding value growth of 9.8% year on year whilst volumes declined by 4.4%. There are significant inflationary pressures within this category and there remains a great deal of uncertainty on poultry quotas, poultry meat marketing regulations, sterling devaluation and general cost inflation. Frozen pizza at 6.6%, frozen vegetables at 6.5%, frozen potatoes at 6.4%, and frozen confectionery and desserts at 6.0% are all enjoying excellent value growth on a year on year basis.

Whilst ice cream has been in the doldrums for some time because of the two awful summers from a volume perspective, there are signs that the improving weather of this year has significantly reduced the volume decline to now only 2.4% year on year compared to a 7.3% decline only one year ago. The value of the ice cream market though has continued to show some growth as consumers turn to luxury treats in recessionary times and the market moves to a bias of premium products.

In only one year the frozen food market has added £400 million in value, which is a remarkable value increase. It is most encouraging that it is across all product sectors showing that the underlying generic benefits of frozen food of locked in goodness, minimal wastage and terrific value are being better understood by hard pressed consumers.

BFFF will continue to positively promote frozen food to the media, consumers and the trade and we look forward to a second year of activity for our consumer promotion program.

**BRITISH FROZEN FOOD FEDERATION  
RETAIL FROZEN FOOD STATISTICS YEAR ON YEAR TO 14 JUNE 2009**

RETAIL CATEGORIES	Value (000's £)			Volume (000's Kgs)		
	52 w/e 15 Jun 08	52 w/e 14 Jun 09	% Gain/Loss	52 w/e 15 Jun 08	52 w/e 14 Jun 09	% Gain/Loss
Total Frozen Foods	4,794,715	5,097,301	6.3	2,012,253	2,016,112	0.2
Total Ice Cream	618,022	629,793	1.9	322,827	315,184	-2.4
Frozen Confectionary & Desserts	264,023	279,885	6.0	80,577	82,221	2.0
Frozen Fish	679,090	711,591	4.8	122,969	123,822	0.7
Frozen Meat & Poultry	529,793	581,867	9.8	188,411	180,045	-4.4
Frozen Vegetables	384,400	409,286	6.5	287,389	290,290	1.0
Frozen Potato Products	502,557	534,890	6.4	452,305	464,545	2.7
Frozen Ready Meals	639,878	657,588	2.8	196,440	187,894	-4.4
Frozen Pizza	352,689	376,097	6.6	99,199	98,724	-0.5
Frozen Savoury Food*	824,263	916,304	11.2	262,136	273,387	4.3

\*Savoury Food includes Frozen Bread, Frozen stuffing Cooked poultry, Meat Products, Processed Poultry, Savoury Bakery, vegetarian products and Other Frozen Foods



Source: TNS Worldpanel  
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