



NOVEMBER 2012

RETAIL PASSES THE £5.5 BILLION MARK

Latest data kindly supplied by Kantar Worldpanel for the year to 2nd September, shows that the value of the frozen food retail market now stands at just over £5.5 billion and has grown over the last 52 weeks by 6.4%. Remarkably, in five years the market has now grown by £1 billion.

Every product sector that Kantar tracks has shown value growth with the top performer being frozen meat and poultry at 12.4% year on year, whilst ice cream at 8.8% and frozen potato products at 8.6% also make the medal podium.

Volume has grown by 0.8% year on year, with the frozen meat and poultry sector also showing the biggest increase at 4.4% year on year. Other notable volume growths include frozen pizza at 2.5% and frozen savoury at 2.2%.

The year on year value growth for frozen of 6.4% is almost double the 12 weeks growth for the grocery market recently highlighted by Kantar at 3.3%.

Also for all of those who read with interest The Grocer's top 100 Retailers Survey, no doubt you would have seen, as I did, the outstanding performance of those retailers that have frozen food at its core. Virtually all parts of the frozen landscape performed well with Frozen Value, Heron, Farmfoods and Iceland all recording excellent numbers, whilst at the premium end of the market, Cook continues to perform exceptionally well with its turnover growing by 20% year on year.

All the trends that we have previously identified which are helping the frozen sector to continue to grow are still prevalent but what is interesting is that more big brands are entering the marketing or returning. In the last week alone there has been news of Greggs increased frozen activity, whilst Ginsters have announced they will be coming into frozen and that Heinz will be re-entering the frozen ready meal market.

The outlook for frozen continues to be extremely positive.

British Frozen Food Federation

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RETAIL FROZEN FOOD STATISTICS YEAR ON YEAR TO 25 NOVEMBER 2012

Retail Categories	Value (000's £)			Volume (000's kgs)		
	52 w/e 27 Nov 11	52 w/e 25 Nov 12	YOY	52 w/e 27 Nov 11	52 w/e 25 Nov 12	YOY
Total Frozen Foods	5,274,005	5,579,193	5.8	2,027,446	2,059,269	1.6
Total Ice Cream	727,009	775,382	6.7	340,484	327,721	-3.7
Frozen Confectionary	264,701	267,685	1.1	74,102	72,460	-2.2
Frozen Fish	748,524	766,251	2.4	128,691	130,154	1.1
Frozen Meat & Poultry	539,806	595,159	10.3	161,292	165,888	2.8
Frozen Vegetables	435,608	464,610	6.7	298,190	306,298	2.7
Frozen Potato Products	569,781	618,793	8.6	464,395	480,729	3.5
Frozen Ready Meals	667,166	708,440	6.2	179,030	185,938	3.9
Frozen Pizza	395,289	411,468	4.1	107,534	108,742	1.1
Frozen Savoury Food*	926,121	971,405	4.9	273,728	281,339	2.8

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

Source: Kantar Worldpanel
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KANTAR WORLD PANEL

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