

British Frozen Food Federation

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



FROZEN RETAIL MARKET GROWTH STORMS AHEAD

The latest data from TNS Worldpanel for the 52 weeks ending 25th January 2009 shows the retail market in total growing by 6.7% year on year. The market has now shown 10 consecutive quarters of accelerating growth and enjoys value growth for all nine product sectors that TNS Worldpanel monitor.

There are now two product categories in double-digit growth and four categories growing at greater than 6% per annum.

Frozen savoury food, which includes cooked poultry, processed poultry, savoury bakery and others is now growing at 10.3% year on year in value terms and is showing volume growth of 6.6%.

The frozen vegetable market has increased its growth rate to 10.1% year on year, a huge acceleration from just under 2% 18 months ago. The increased level of consumer interest in frozen foods in general, the increased publicity on the amount of food that's wasted and the many campaigns highlighting the locked in nutritional goodness of frozen foods have all helped this category to storm ahead.

The frozen fish market is worth just under £700 million and has grown from under £600 million in only 18 months. This product category benefits from the intensive competition of Young's and Birds Eye with both major brands highlighting the Omega 3 health benefits in their products, launching creative new packaging and innovative promotional activity.

Frozen meat and poultry is now growing at 7.6% per annum, whilst frozen pizzas continue to perform exceptionally well at 7.0% year on year growth whilst frozen potato products are now enjoying an annual growth rate of 6.3% with the market now being worth in excess of £500 million.

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As we have repeatedly said in previous prefaces we see no reason why the accelerating growth of the frozen food market should not continue. Consumers are turning to frozen food as households battle with diminishing household budgets, consumers increasingly are reluctant to waste any food, yet still want to provide nutritionally balanced meals for their families and frozen food, as we all know, ticks all the boxes.

BFFF
March 2009

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BRITISH FROZEN FOOD FEDERATION

RETAIL FROZEN FOOD STATISTICS YEAR ON YEAR TO 25 JANUARY 2009

Source: TNS Worldpanel



RETAIL CATEGORIES	Value (000's £)			Volume (000's tonnes)		
	52 w/e 27 Jan 08	52 w/e 25 Jan 09	% Gain/Loss	52 w/e 27 Jan 08	52 w/e 25 Jan 09	% Gain/Loss
Total Frozen Foods	4,628,472	4,939,240	6.7	1,968,659	1,987,602	1.0
Total Ice Cream	600,689	617,346	2.8	326,927	308,406	-5.7
Frozen Confectionary & Desserts	261,011	269,322	3.2	80,603	80,071	-0.7
Frozen Fish	645,828	695,251	7.7	117,587	123,700	5.2
Frozen Meat & Poultry	525,313	565,119	7.6	187,473	180,836	-3.5
Frozen Vegetables	362,197	398,670	10.1	281,227	282,509	0.5
Frozen Potato Products	487,564	518,101	6.3	435,829	458,715	5.3
Frozen Ready Meals	616,376	640,586	3.9	191,201	188,145	-1.6
Frozen Pizza	343,354	367,508	7.0	97,783	98,565	0.8
Frozen Savoury Food*	786,140	867,337	10.3	250,029	266,655	6.6

*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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