The Grocer

Focus On: frozen food by Amy North (amy.north@thegrocer.co.uk)

Publishing: 6 June
Advertising deadline: 22 May
Submissions deadline: 9 May

The Story

UK frozen food players have a problem. Two, in fact: a lack of freezer space in store relative to other European markets and retailers' reluctance to increase space devoted to frozen food. So, with the potential for volume growth restricted by these physical barriers, how are suppliers and retailers looking to increase the value of the category? And are their efforts paying off?

Key themes:

Adding value: The frozen food market has been more or less flat over the past year, with value ahead slightly on volumes. To what extent has the average price rise been driven by the development of more premium products designed to increase the value of retailers' freezer space? What are players doing to this ends over the coming year?

Frozen meat and poultry products: sales continue to plummet. Why? This feature will explore who has been hit the hardest by the decline and how they are looking to recover, investigating whether anyone has managed to defy the decline and if any adjacent categories (chilled?) are benefitting from the decline in frozen.

Frozen prepared food: is in much better shape, with pizza and processed meat and poultry products such as breaded chicken doing particularly well. Why is this? To what extent is the growth in value ahead of volume being driven by the development of more premium products? And why are some areas, such as frozen veg, in decline?

Frozen fish: is holding up better than frozen meat and poultry, but nevertheless still in value and volume decline. Why? What are brands and retailers doing to drive more value into the sector and put overall sales back into growth?

Frozen poultry: sales of frozen poultry are flying. This feature will explore the factors, brands and retailers that have led to this result. Key questions will cover the relative cost effectiveness of poultry compared to red meats and whether consumers switched to white meats as doubts were raised over red meat by the horsemeat scandal.

Other frozen categories: the scope of this feature is particularly wide, given the fact frozen food now accounts for about 7% of space in the big four. As well as the sub categories described above we will also be exploring everything from pizza to pastries, ice cream to vegetarian products, with a particular focus on innovation and the frozen foods biggest wins and losses over the past year.

Share of freezer: the supermarkets have finite freezer space, of course. So, with some frozen sectors in strong growth and others in decline how is the share of freezer space devoted to specific categories changing?

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth. Of particular interest will be how brands are looking to use freshness and nutrition cues in their marketing.

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2014. We will be profiling four of the most interesting launches in a separate innovation panel. *See boxes below.*

Promotions: This feature will explore how the promotional strategies of retailers and brands have changed over the past year. Attention will be paid to the promotional strategies of retailers and how this has affected average prices over the past year.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?