The Grocer

Focus On: frozen food by Daniel Selwood (Daniel.Selwood@wrbm.com)

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The Story

Frozen food is frozen solid for the second year running. Value remains static while volumes inched up. But, ice cream and desserts are storming ahead, with Brits splashing out an extra £50m on frozen sweet treats. How come? Are retailers dedicating more space to these higher prices sub-categories? What does this mean for the rest of frozen – how can they reclaim their space and sales?

Key themes:

Ice cream and desserts: These subcategories have generated more than £50m in growth over the past year. How has this been achieved? To what extent is this down to retailers dedicating more space to these higher priced items? Which brands and retailers are benefiting from this move? Who is losing out?

Chilled vs frozen: Are frozen brands eyeing up the chilled aisles for growth? With one brand moving into chilled potatoes in September, did it do this because retailers are dedicating less space to their products or frozen potato products more generally? Frozen ready meals, pizza and meat also suffered losses – how does this compared to chilled?

Potatoes: However, value sales of frozen potatoes are up. Impressive, especially considering the deflationary pressures felt elsewhere in the category. How are they adding value in this market? What can others learn from this?

Range changes: A key angle of this feature will be an exploration of how retailers have rationalised their ranges in the past year, with particular focus on which brands and own label ranges have lost and won space.

Own label vs brands: Own label's sales grew compared to a loss for brands in the frozen aisles. Why is this? How have retailers' frozen own label ranges changed over the past year?

Meat, fish and poultry: Frozen meat, fish and poultry has had a tough year. Why is this? 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.

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 2017. We will be profiling some of the most interesting launches including Main Meal, Side Dish plus Ice Cream & Desserts in separate innovation panels.

Prices and promotions: This feature will explore how the promotional and pricing strategies of retailers and brands have changed over the past year. Attention will be paid to the promotional strategies of retailers and what effect this has had on 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?