

## Attitudes towards Frozen Food - UK - September 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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“Frozen food is a near-universal part of British menus, spurred by the value for money and convenience image of buyers’ favoured products. Current consumer trends pose challenges for frozen, as many buyers lack confidence in cooking with frozen ingredients while the shrinking size of homes and households sees freezer space diminished, highlighting smaller packs as a development area.”  
– Anita Winther, Research Analyst

### This report looks at the following areas:

- Frozen food struggles to appeal to the large pool of scratch-cooks
- A case for smaller packs as freezer space diminished by homes and households getting smaller
- Price promotions outside the frozen aisle can help to address key challenge of driving footfall

Frozen food is a near-universal part of British menus, spurred by the strong value for money proposition and convenience of the buyers’ favoured products. Yet for many people this only entails buying a handful of frozen product types, while they only visit the frozen aisle as a destination for these. With most frozen food buyers choosing their groceries based on which products catch their eye, the nature of the aisle further puts the category at a disadvantage.

Current consumer trends also pose challenges for frozen, with the shrinking size of homes and households seeing freezer space diminished and highlighting smaller pack sizes as a development area. Meanwhile, the category is struggling to capitalise on the appeal of scratch-cooking as many buyers lack confidence in cooking with frozen ingredients and see them as poorly suited for scratch-cooking.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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## The implications

### The Market – What You Need to Know

- Frozen food benefits in lean times
- Scratch-cooking poses challenges to frozen food
- UK housing trend puts a squeeze on freezer space
- Focus on food waste should support frozen food
- Rise of top-up shopping could challenge frozen

### Market Drivers

- Economic downturn benefited frozen food
- Shoppers look to chilled when their budget allows it
- Uncertainty awaits the market
- Scratch-cooking trend poses challenges to frozen food
- UK housing trend puts a squeeze on freezer space
- Focus on food waste should support frozen food
- Rise of top-up shopping could challenge frozen

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## Advertising and Marketing Activity

Leading frozen food players up their adspend

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A focus on quality

Iceland looks to authentic provenance ...

... and recommendations from "real mums"

Dr. Oetker turns to sampling to prove its taste credentials

McCain puts its cooking centre stage

Pushing the no-waste benefit

Sainsbury's looks to food bloggers to showcase frozen food recipes

Birds Eye looks to make frozen savings tangible

Nielsen Ad Intel coverage

## The Consumer – What You Need to Know

Frozen food is bought near-universally

Value and convenience are key drivers for opting for frozen food

Defrosting and pack size are barriers, one in three non-buyers cite none

Driving footfall is a key challenge for frozen

High interest in frozen food meal deals

Appealing to scratch cooks remains a challenge

Consumers struggle to navigate the frozen food aisle

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Frozen food is bought near-universally

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45-54s and families are key buyers

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Value is key driver for opting for frozen food

Importance of value as driver leaves frozen food vulnerable to trading up

Focusing on food waste could help strengthen value proposition

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Convenience prompts many to buy frozen food

Over-55s are most likely to buy frozen food as a fall-back option

Nutrient retention compels few buyers

## Reasons for Not Buying Frozen Food

One in three non-buyers cite none of the common barriers to frozen

Figure 12: Reasons for not buying frozen food, July 2016

Defrosting is a barrier

Large pack sizes an obstacle for small households

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Young people are put off by processed feel  
Sampling should help to win over young adults

## Frozen Food Shopping Behaviours

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## Attitudes towards Frozen Food

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