



Frozen Food Report 2022

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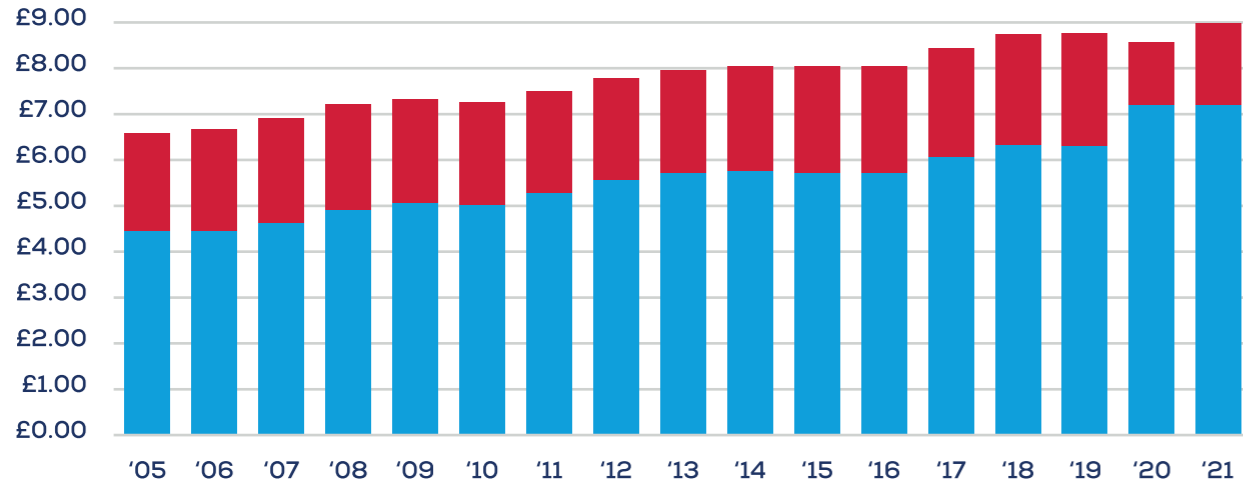
CEO Introduction

Richard Harrow, British Frozen Food Federation

Welcome to the 2022 Frozen Food Report covering 2021, which proved to be a challenging year wherever you sit within the frozen food supply chain.

Those members in the Food Service sector have had to suffer a year that started with much of the industry closed, although there was some relief as we moved into the Spring. However, as the year progressed, we saw huge issues with the supply of labour, which impacted supply of products and the availability of labour in end users. Then members were hit with the shortage of HGV drivers, followed by a "defacto" closedown as we neared year end. The market did see a recovery in value from 2020, but it remains significantly below pre-pandemic levels. However, as you will read the sector has shown amazing resilience against so many head winds.

Value of the Frozen Food Market 2005 to 2020⁽¹⁾



Members in the retail sector also suffered many of the same challenges throughout the year. However, they did manage to remain open, and indeed as we highlighted in last year's report, 2020 was a year that frozen food retail sales soared. Whilst 2021 saw a slight reversal of sales volume, value sales remained only marginally behind the record sales of of the previous year.

As foodservice experienced a slight recovery in sales vs 2020 this resulted in the total frozen food market growing year on year by 4.6% to reach a value just short of £9bn.

As our data shows, the market has added £2.4bn worth of sales value since 2005 with some categories, such as ice cream,

having more than doubled in value. We also highlighted in last year's report the range of categories and products now offered in frozen means in many respects the category is totally different to the one consumers or professional chefs would have had access to in 2005.

However, today it is not sufficient just to bring innovation to the market. Today, members need to consider many topics that consumers and chefs consider important, from packaging reduction, plastic reduction, carbon footprint, sustainability, water stress, and health to name just a few. It is also not just responding to consumer trends that members must contend with, they must also

IGD Channel Growth Forecast 2021 to 2026 (£bn)⁽²⁾



cope with an ever-increasing involvement from Government. For example, the recently introduced Natasha's Law, the forthcoming plastic tax and new rules of foods under the HFSS rules.

Also, where we buy our products today is vastly different with online and the discount channels now being key parts of the supply chain. It is clear there is a more direct link between retail and out-of-home consumption, this was obvious in 2020 and the early part of 2021, when retail sales benefited from so much of the foodservice market being closed. Whilst the impact of Covid may wane, IGD forecast that we will see continued shift in how consumers access food.

I continue to feel very optimistic about our industry. The quality we provide, the innovation we deliver, all in a convenient form that avoids food waste is a very positive message that we all need to communicate at every opportunity.

I would also like to thank all the members who provided content to help us create this year's report. Indeed, it proved a challenge because we had so much content to choose from.

So, if we did not directly use a quote or data that was kindly provided, the submissions did not go to waste as they helped formed our ideas for this report.

1. Highlights

Chapter 2 - Retail

Despite 2021's slowdown in sales, frozen has emerged from the pandemic in better shape than ambient and chilled food, with the overall value of the market up by a staggering 13.2% on pre-pandemic levels.

Page 12. The retail market

Young's Seafood report that an extra 433,000 consumers have entered the frozen fish category since 2019.

Page 13. The retail market

In 2021, frozen brands increased their share by 46.5%

Page 26. Private label versus brands

Average prices have risen by 2.1% over the last 52-week period. We anticipate that prices will rise further in 2022.

Page 31. Private label versus brands

Chapter 3 - Foodservice

The shortage of skilled people in the kitchen and front of house has led to reduced operations and changes to how venues operate.

Page 53. Challenges

Nearly three quarters (72%) of adults now proactively try to lead healthy lifestyles – an increase of 10% points in little more than a year.

Page 54. Consumer motivations

The VAT increase back to 12.5% in October 2021 has not helped with this inflationary pressure, and we will see this worsen in April when VAT returns to 20%. We forecast that around 3% points will be passed on in higher menu pricing, and operators will take a revenue hit of some 4.5% points.

Page 58. What to expect in 2022

Chapter 4 - Sustainability

In a 2019 NielsenIQ survey, 73% of global consumers said they would definitely or probably change their consumption habits to reduce their impact on the environment.

Page 68. The BFFF Special Interest Group (SIG) on Sustainability

Plastic is proven to reduce waste, CO2 and fossil fuel use. In fact, replacing it generates five to 15 times more CO2.

Page 86. Meet the members: Excelerate Ltd

Most shoppers (62%) are now influenced in their food and drink purchases by sustainability issues and frozen food is perfectly positioned to help

Page 92. Meet the members: Birds Eye

Chapter 5 - Consumer Behaviour

We are seeing more in-home lunchtime occasions – of all occasions in-home since lockdown, lunch has seen the greatest increase at 55%.

Page 107. Tomorrow's shoppers

Fifty nine per cent of consumers have switched to healthier diets post-Covid; 41% want to lose weight, 40% want to increase fruit & veg consumption, 39% want to cut sugar and 14% want to boost their immune system through their diets.

Page 108. Tomorrow's shoppers

Volume growth of frozen herbs of 59% in 2020 versus 2019. The trend continued into 2021, with volumes still up 57% versus pre pandemic sales.

Page 121. Introducing the 'store cupboard on ice'

2. Retail

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Photo: Crispy Chicken Grills
Company: Birds Eye

2.1 Retail Chapter Champion

Steve Challouma
General Manager UK, Birds Eye

2020 was a phenomenal year for frozen food. Buoyed by the change in shopping habits as a consequence of the Covid-19 pandemic, we saw record retail sales and growth as shoppers reappraised the category and rekindled their relationship with the freezer.

Not only did we see a surge in short term penetration of the category, we also saw a 50% increase in the sales of in-home freezers⁽¹⁾, an increase in the proportion of frozen food sales going through e-commerce and a spike in consumption of frozen at the 'lunch' occasion. This is driven by children being home schooled and the move to working from home – all tailwinds which will have positive structural impacts for the category in the future.

The UK entered its third national lockdown in January

2021, with non-essential shops closed, schools shut, and people ordered to stay at home. This dynamic continued to benefit frozen, as we saw retail sales grow +8% in the first quarter⁽²⁾. However, as restrictions eased from April onwards, we saw category growth slow as it lapped the huge spikes in 2020. The frozen category therefore exited 2021 +1.3% YoY⁽³⁾, driven by less frequent shops and, more significantly, smaller shopping baskets. Despite this, we collectively managed to attract an additional +175k shoppers to the frozen aisle vs 2020 and +441k vs 2019 (+1.6%)⁽⁴⁾.

Despite the slowdown in growth in 2021, the market for savoury frozen (as defined by Birds Eye) ended up a massive 11% bigger than it was in 2019, with £400m of additional Retail Sales Value (RSV) generated and the

average household spending £25 more a year on the category. This also translated into an increase in the number of in-home frozen meal occasions, which grew +12% in 2021 vs 2019⁽⁵⁾. As flexible working became more prevalent, we saw shoppers opt for the freezer more often with the lunchtime occasion seeing the greatest increase. As mealtimes and occasions became less formal, we have also seen considerable growth in snacking categories across both savoury frozen, desserts and ice cream.

With the significant reassessment of the category benefits that have experienced in the last two years, we as an industry are in a unique position to retain these shoppers by championing frozen's fantastic credentials.

Convenience remains as the primary driver

of frozen food consumption; however, consumers are now choosing healthier meals compared to pre-lockdown. Frozen is well positioned to capitalise on these macro trends around convenience, health and wellbeing – but also sustainability. The majority of shoppers (62%) are now influenced in their food and drink purchases by sustainability issues and frozen food is perfectly positioned to help – offering excellent value as a healthy, sustainable and convenient meal option which also helps to reduce food waste⁽⁶⁾.

Continuing to hero frozen's value for money to shoppers will be essential as economically 2022 is likely to be a challenging year for some consumers. Some households will still be feeling the impact of the pandemic, while we are also facing into rising inflation.

Another challenge on the horizon is the HFSS Government legislation due to go live from October. This could have a significant impact to the in-store environment for frozen, especially to categories such as pizza and ice cream, so navigating this will be essential to the long-term success of the category.

Despite a challenging 2021, there is cause for optimism. Whilst 99.4% of UK households buy into frozen every year, there is still massive headroom for growth across individual categories – and only 13% of main meal occasions include frozen. This gives me great confidence that we can continue to unleash frozen's full potential and I welcome you to continue reading and dive deeper into the Retail chapter of this year's Frozen Food Report.

Photo: Chicken-Free Dippers
Company: Birds Eye Green Cuisine



Photo: Garlic & Herb Chicken Kiev
Company: Birds Eye



2.2 The retail market

Frozen food has come of age in the past two years of turmoil. When the pandemic turned the world upside down in 2020, frozen food delivered the strongest growth of any food category for Britain's supermarkets, significantly outgrowing ambient and chilled groceries⁽⁷⁾.

The past year has been one of consolidation for frozen food manufacturers and their retail partners, with overall sales slipping into a year-on-year decline of 1.3% in 2021⁽⁸⁾. This dip in market value following the record growth of 2020 is easily explained.



"As the country began easing out of restrictions, shoppers began shifting their spend into food on-the-go and chilled ready meals to help ease their daily routines," explains **IRI Business Insight Director Michal Weavis**.

"That shift has had a direct impact on categories which were previously in strong growth and high demand, such as frozen, home baking, hot drinks and fresh milk – all of which are now experiencing declines as consumers begin returning to work and reducing the number of days spent at home."

Despite 2021's dip in sales, frozen has emerged from the pandemic in better shape than ambient and chilled food, with the

"As the country began easing out of restrictions, shoppers began shifting their spend into food on-the-go and chilled ready meals to help ease their daily routines. That shift has had a direct impact on categories which were previously in strong growth..."

Michal Weavis
Business Insight Director, IRI



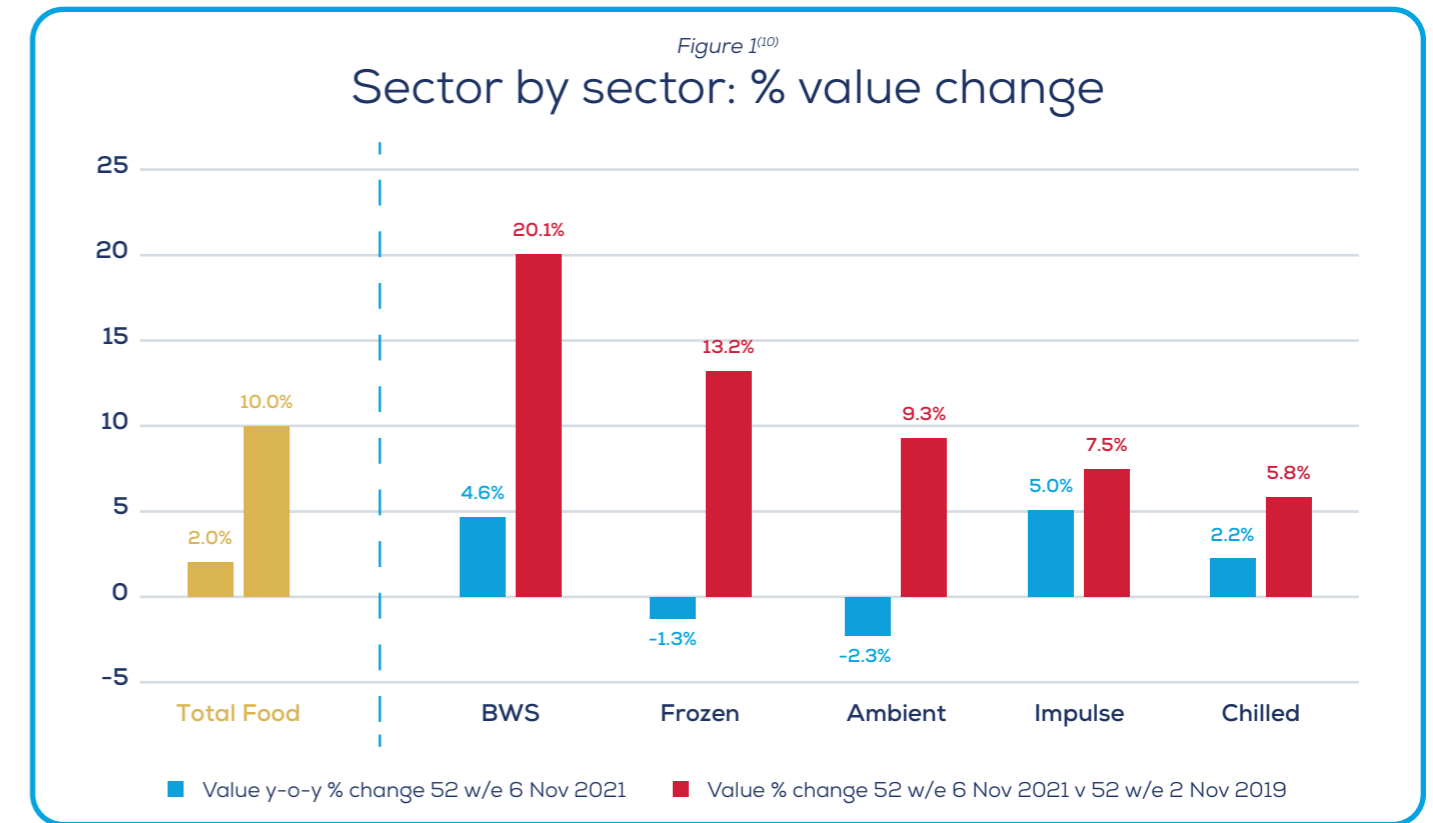
overall value of the market up by a staggering 13.2% on pre-pandemic levels. According to Kantar, frozen food category growth has added just shy of £860m to retail sales⁽⁹⁾.

Figure 1: Frozen food achieves strongest retail growth after alcohol⁽¹⁰⁾

As figure 1 shows, only alcohol has outperformed frozen food since the start of the pandemic, with supermarket sales of beer, wine and spirits up by just over a fifth on 2019's figures. With pubs and restaurants

shut for much of the past two years, it's clear that shoppers have been looking to recreate out-of-home experiences inside their homes.

This has also benefitted frozen food, helping to attract new shoppers into the category and broadening the frozen food sectors they are buying into. Young's Seafood reports that an extra 433,000 consumers have entered the frozen fish category since 2019. But frozen fish is not alone in welcoming new shoppers. Birds Eye says it has seen an influx



of newcomers into the frozen vegetable and meat sectors, as well as other key categories it operates in.



"The increase in at-home eating occasions has been the biggest trend in frozen. There's been a return to fewer, bigger shops, which has placed greater emphasis on meal planning and the importance of the freezer."

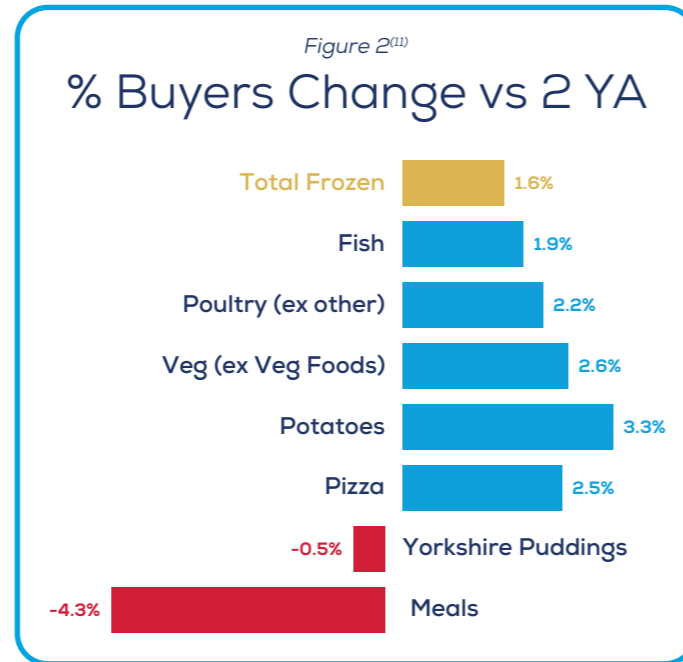
While growth has been predominantly driven by existing shoppers broadening their repertoires, we have also seen new shoppers enter the category, looking to cater for a wider range of meal occasions, including lunchtime and more casual dining options."

Gareth Roberts

Head of Category Management (Frozen), Young's Seafood

Figure 2: Consumers broaden frozen food horizons⁽¹⁾

The chart illustrates a key trend of the past two years in frozen food: the broadening of shoppers' repertoires due to increased time spent at home and the closure of the hospitality sector. Fewer Sunday roasts at the pub or trips out for pizza have led to significantly more households buying frozen potatoes, vegetables, pizza and the like.



2.3 Shopping patterns

Shopping patterns continue to flex in response to changes to Government guidance on working from home, social distancing and the re-opening of pubs and restaurants. Despite the easing of restrictions throughout much of 2021, consumers Shopping patterns continue to flex in response to changes to Government guidance on working from home, social distancing and the re-opening of pubs and restaurants. Despite the easing of restrictions throughout much of 2021, consumers continue to shop less frequently than they did before the pandemic. They also continue to buy more products per trip.

A return to anything even resembling pre-pandemic shopping patterns is happening slowly. Kantar recently noted that, at the current pace of change, it will be three years before we return to pre-pandemic profiles.

IGD predicts that the retail Grocery sector will remain bigger than in its pre-pandemic forecast, due to fewer out of home eateries operating.

Frozen, fresh and ambient groceries have all benefitted from the partial closure of the out-of-home market. The extent to which

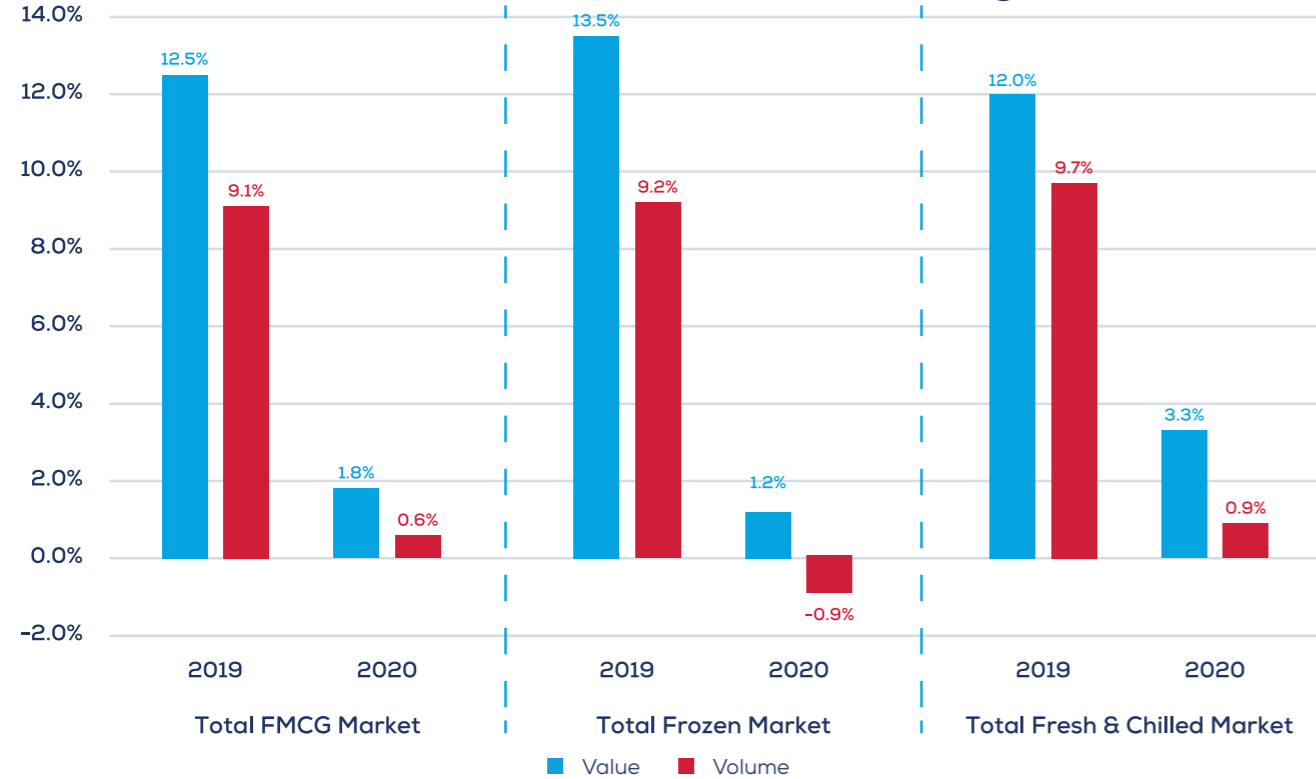


Photo: Frozen Waffles
Company: Griddle

⁽¹⁾ Kantar 52 w/e 3 November 2019 vs 52 w/e 31 October 2021

⁽⁵⁾ Kantar 52 w/e 52 w/e 3 November 2019 vs 52 w/e 31 October 2021 ⁽⁶⁾ Kantar Data 52 week data - 31 October 2021

Figure 3⁽¹²⁾
Sector by sector: % value change



frozen has outgrown fresh and ambient largely varies depending on how the data you are using has been gathered. But one thing remains consistent, regardless of whose data you are looking at: frozen food has won significant value share of the grocery market since the start of the pandemic. See Figure 3, which is based on Kantar data, for further proof.

Figure 3: Frozen wins value share from fresh⁽¹²⁾

The total grocery market is mirroring frozen with value growth of 1.8% and volume only slightly ahead at 0.6%⁽¹²⁾. Fresh food may have had a stronger year in 2021, but this is against a backdrop of lower growth in 2020. Over the two years, frozen is the clear winner, outperforming total grocery in

value and volume growth terms, and chilled in value. So, what are the hottest spots in frozen?

Ice cream

Ice cream is the largest single category in frozen, worth £1.3bn to retailers and accounting for 18.6% of their overall frozen food sales, up from 17.3% in 2019⁽¹³⁾. Ice cream has been flying from the freezers for the past two years, as out-of-home occasions have shifted inside the home and more shoppers have sought to treat themselves through the stress and uncertainty of lockdown.

"This year, despite the daunting task of trying to annualise the record-breaking numbers of 2020 and a typically British



summer, sales have been largely positive," says **Henry Craven Customer Marketing Controller at Froneri**. "We've seen demand for ice cream remain strong, as consumers have stuck with the increased consumption habits they formed during lockdown."

Indeed, sales of handheld ice creams surged by 7.8% on volumes up 6.4% in 2021, while ice cream in tubs grew by 0.9% on volumes that slipped 3.2%⁽¹⁴⁾. This is impressive given that 2020 was a record year for ice cream. That year, handheld sales spiked by 19.1% in value and 9.8% in volume and tubs grew by 10.3% on volumes up 6.9% year-on-year⁽¹⁵⁾.



Photo: Madagascar Vanilla Company: Hopwells



Photo: Love Vegan Strawberry Ripple
Company: Hopwells

Of course, year-on-year comparisons don't tell the whole story. "To understand the underlying long-term category trend, we need to look pre-Covid," continues Henry Craven at Froneri. "Sales for summer 2021 versus summer 2019 are up by more than 20%, really highlighting the strength and long-term growth the category is enjoying."

Brands have benefitted most, he adds. "In lockdown, consumers increasingly chose trusted and well-loved brands ahead of own label. This is a trend we've continued to witness this year, with brands now forming 76% of total ice cream sales. We've enjoyed success with our biggest and most

popular brands like Cadbury and Rowntree's, as families continue to stock up on their favourites.

"Another trend we're seeing develop is growth in ice cream snacking occasions, as mealtimes and dessert occasions become less formal. This growth has been accelerated by Covid conditions. Although tubs remain important to the category, handheld products are generally more suited to snacking, so we've seen handheld products continue to gain in popularity, making up almost two thirds of sales this summer and 69% of units."



"We're seeing growth in ice cream snacking occasions, as mealtimes and dessert occasions become less formal. This growth has been accelerated by Covid conditions. Although tubs remain important to the category, handheld products are generally more suited to snacking."

Henry Craven

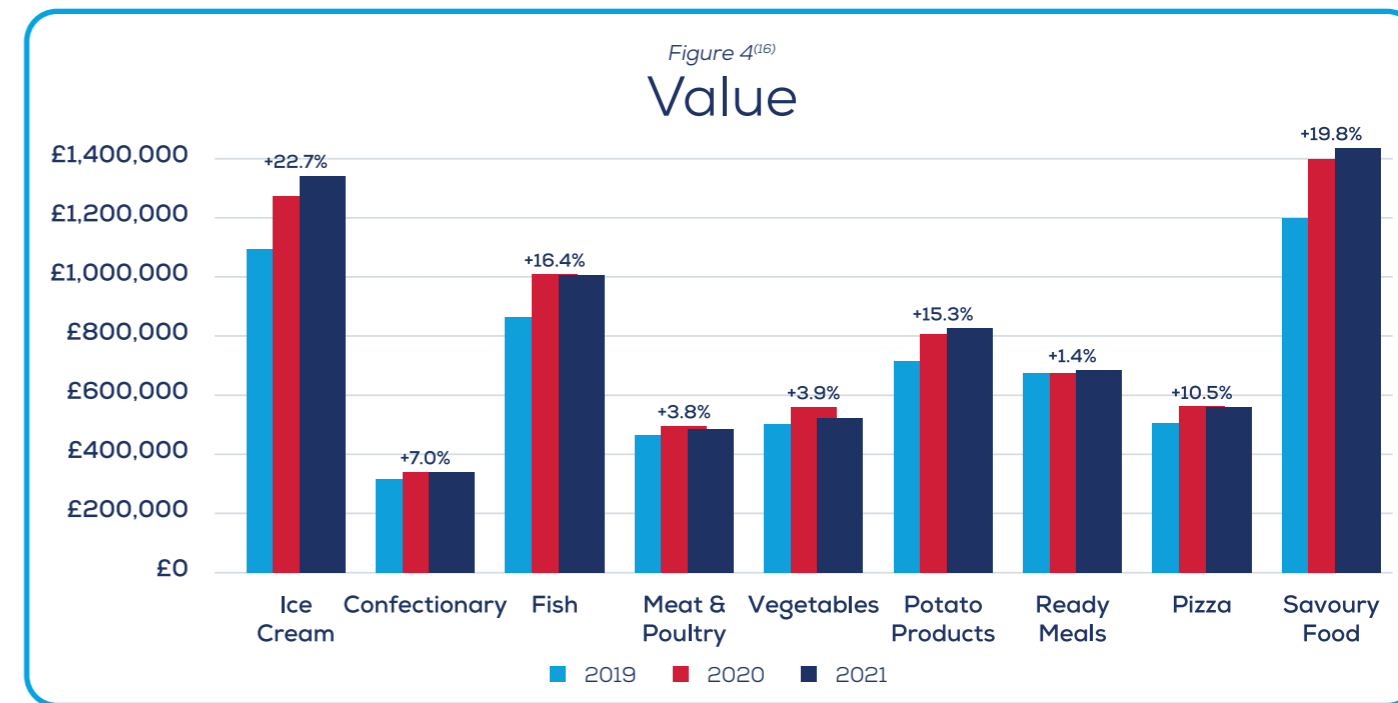
Customer Marketing Controller, Froneri

Figure 4: The hottest spots in Britain's freezers⁽¹⁶⁾

Plant-based

Note the astonishing £237.4m (19.8%) growth in sales of savoury foods since 2019, as shown in Figure 4. This is second only to ice cream's £248m (22.7%) gain⁽¹⁷⁾. Of course, the strong growth in products such as frozen pizza and poultry (see page 14) are partly to thank for this, but so too is the boom in sales of plant-based products, which have achieved 16.8% growth since 2019⁽¹⁸⁾.

Meat substitutes – products such as sausages and burgers that have been



(16) Kantar 52 w/e 3 November 2019 v 52 w/e 1 November 2020 v 52 w/e 31 October 2021 (17) Kantar 52 w/e 3 November 2019 vs 52 w/e 31 October 2021 (18) Kantar 52 w/e 3 November 2019 vs 52 w/e 31 October 2021



Photo: No Duck Spring Rolls
Company: Heron Foods

formulated to mimic the taste and mouthfeel of real meat – are particularly significant for the frozen plant-based sector, accounting for 82% of sales. The remaining 18% of frozen plant-based sales is made up of conventional “veg forward” products⁽¹⁹⁾.

Although many consumers claim to be trying to cut down on meat throughout the year, plant-based sales still experience a huge seasonal surge every January. This, of course, is thanks to Veganuary, which has become a well-established retail event since it first took place in 2014. The 2021 event drove a 17% year-on-year increase and accounts for 9% of annual plant-based sales, says Birds Eye. The manufacturer says the event typically gives a 22% boost to sales versus other months.

According to one Kantar study, 71% of 61,977 respondents were aware of Veganuary and 10% of that group took part in the event in 2021. Young adults aged 18-34 were most engaged, with the top three participation drivers being health, personal challenge, and environmental factors.

The frozen meat-free category has grown penetration consistently since 2016, with significant spikes each Veganuary. January 2021 was no different; frozen saw a 24% uplift in category penetration versus the previous 48-week average. Retailers are also broadening ranges. Total category distribution grew 12% in January 2021 vs

2020.

January is a key time for NPD, with new products from the likes of The Curators, Greggs and Heinz entering the market in 2021. One trend to keep an eye on in plant-based is the arrival of high street brands in the supermarkets’ freezers. For example, itsu [grocery] and Greggs have brought the high street into the home with combined sales of £3.9m in their first year on sale⁽²⁰⁾.

Photo: Chicken-Free Nuggets
Company: Birds Eye Green Cuisine



“In the UK, the meat-free category is now worth £648.4m in take-home sales, having grown by 20.2% in the past 12 months⁽²¹⁾. But it’s not just for vegans, it’s flexitarians that are largely driving the growth in meat-free. In response, and after months of development, itsu launched an exceptional ‘fake meat’ gyoza, which is juicy and full of flavour – the Teriyaki Chick’n Vegan Gyoza.”

Mary Crichton
PR and Influence Manager, itsu [grocery]

According to research carried out by Meatless Farm UK, 42% of consumers now classify themselves as ‘meat reducers’ and a further 11% are ‘meat rejectors’. The manufacturer also notes that while the

frozen plant-based sector is currently smaller than chilled, frozen plant-based mince and burgers are out-performing their chilled counterparts. Indeed, Kantar data shows strong growth for these products (see Figure 5).

Figure 5: Frozen plant-based sales⁽²²⁾

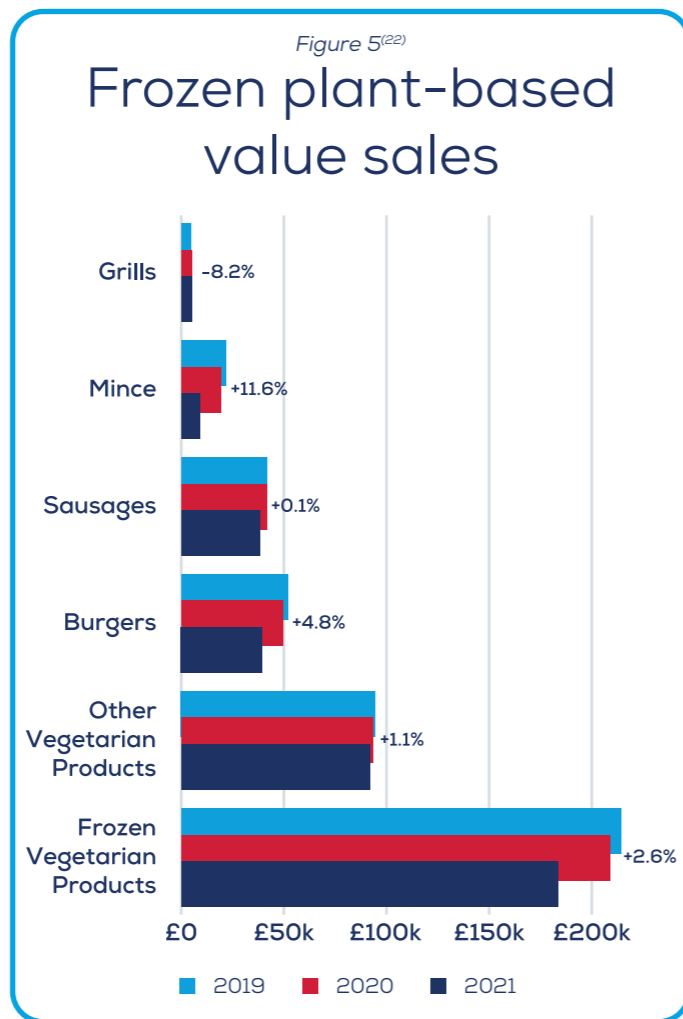


"We are seeing a lot of product development within meat-free, with 95 new products landing in 2021. Here at Birds Eye, we have taken our Green Cuisine range from five SKUs in 2020 to 19 in 2021. This has helped us drive our market share to 8.4%."

Jonathan Whiteley
Senior Category Manager, Birds Eye

Plant-based is not just about centre plate products such as burgers and grills. Strong Roots Spinach Bites sit firmly in the snacking area and are now worth £1.3m for example. The brand suggests this is evidence of an opportunity for growth in frozen meat-free snacking and points to its development of convenient toaster-friendly products as one way it's cashing in.

The forecast is that this the frozen plant-based category will grow substantially,



driven by trends such as positive health. This is leading to more interest in vegan and plant-based products in a widening range of categories including ice cream and frozen desserts.

Frozen fish

Frozen fish broke through the £1bn barrier in 2020 and 2021's sales represent a 16.4% (£141.2m) gain in just two years, despite a slight year-on-year dip⁽²³⁾. As we've seen (see page 14), this is being driven by a combination of penetration growth and existing shoppers broadening their repertoires and buying more frequently.

With fewer people visiting pubs and restaurants over the past two years, it



"Frozen plant-based products (+46.4%) are currently growing at over four times the rate of meat analogue products (+11.6%) as consumers begin to switch across. According to Kantar,

plant-based currently makes up 22% of the market. If the growth trends continue at their current rates, plant-based will overtake meat analogue midway through 2025."

Emma Curtis
UK Managing Director, Strong Roots



seems many have been getting their fix of scampi and chips, and other fishy treats at home. Clearwater Seafoods says that consumers are now buying into shellfish categories in record numbers with overall volumes growing at 7% and frozen scallop sales up 29%.

Another subcategory in growth is whole langoustines, which has traditionally been quite a small category in the UK with most of the domestic catch going to southern EU countries. Macduff Shellfish, part of Clearwater Seafoods, has seen +20% growth in UK sales of this product.



"Managing fish populations, preserving marine biodiversity and protecting habitats is no easy task. It requires cooperation at all levels of government, from local management to multilateral agreements across the globe. We're dedicated to working with suppliers, Governments, fisheries, organisations, NGOs and local communities to do this in order to ensure a sustainable future for our industry and the environment."

Cameron Moffat
Sustainability Manager, Young's Seafood



"Clearwater's wild-caught Canadian scallops are frozen-at-sea in less than one hour after leaving the ocean, resulting in a delicious freshly-caught taste and texture. Scampi is a more mature category, with this popular item forming a staple part of the British diet for many years now. However, even after a very strong performance in 2020, scampi has continued on a positive trend this year, recording 17% volume growth up to September 2021, with frozen again being the main driver, as it accounts for 90% of the category.⁽²⁴⁾"

John Ashmore
Marketing Director, Clearwater Seafoods and Macduff Shellfish

Photo: Argentine Scallops and Shells Company: Clearwater Seafoods



Photo: Chip Shop Burger Company: Young's Seafood

2.4 Private label versus brands

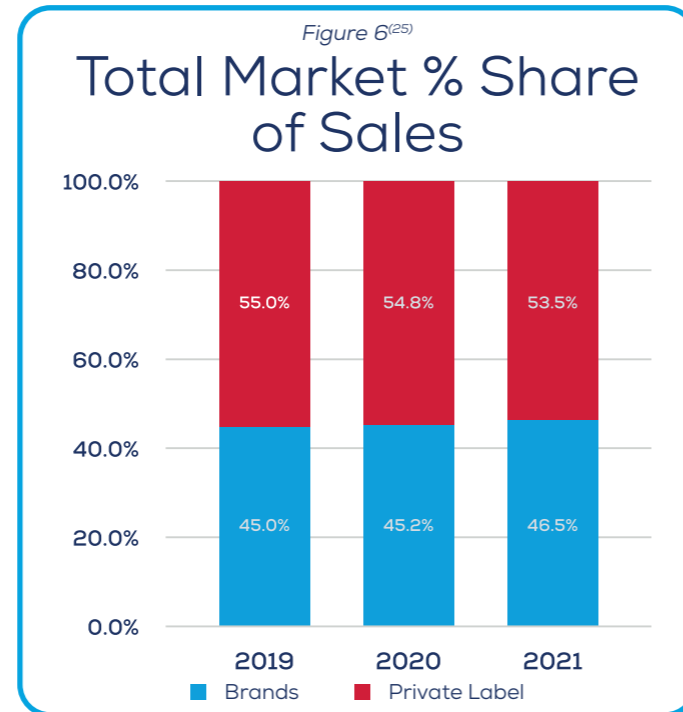
The UK market is quite exceptional for the strength of private label across many categories. Private label has a 51.8% value share across total grocery. That's the largest share in Europe, making it one of the most advanced markets in the world. Frozen food exceeds this share, with private label accounting for 53.8% of market value and 63.7% of volume.

However, that share is being eroded by strong branded offerings. Since 2019, private label share has fallen by 1.5% points in value and 0.8% points in volume (see Figure 6) with brands delivering growth of 15.3%, versus private label's 12.3% gain over the two



years. In 2021, frozen private label products suffered a 3% decline (see Figure 7).

Figure 6: A divided market⁽²⁵⁾



Private label participation in frozen varies quite considerably across retail groups, but the big drivers of the category are the discounters. Private label respectively accounts for 96.2% and 86% of Aldi and Lidl's frozen food sales. This means Aldi has double the value sales of private label than

Morrisons and Lidl sells marginally more frozen private label than Sainsbury's does.⁽²⁶⁾

Figure 7: Frozen brands drive lion's share of growth⁽²⁷⁾

Whilst consumers love the value offered by the discounters, their pricing policies drive market distortion, particularly in products or categories in which Tesco and Sainsbury's run Aldi price match strategies. For example, private label pea prices in November 2021 were driven as low as £0.61 per kg. This helps explain why the frozen vegetable category has seen an average price decrease of 6%

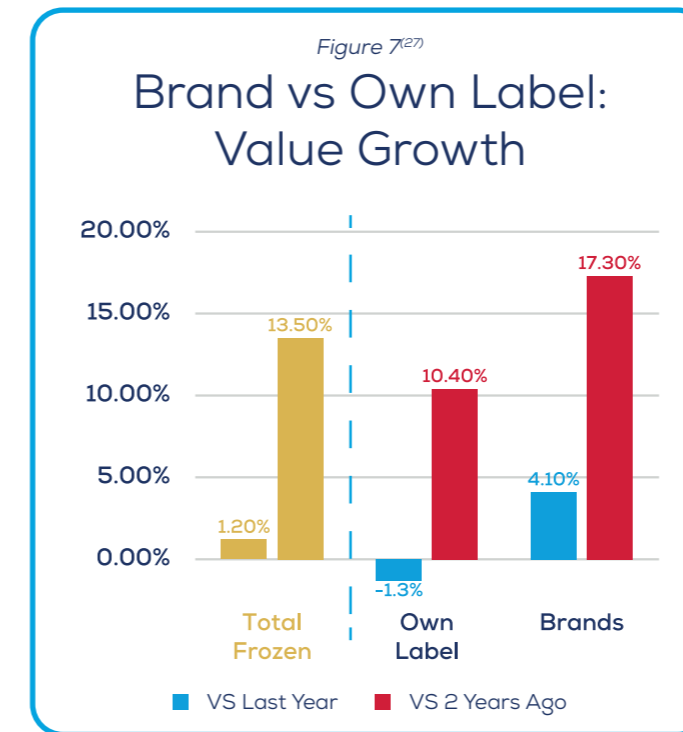


Photo: Battered Scampi
Company: Whitby Seafoods



over two years, as peas account for about half the volume of frozen vegetables sold.

However, the discount sector is not just about low prices. Aldi and Lidl also generate some excellent NPD. Aldi, for example, won five Gold and two Silver awards in the BFFF Frozen Food Awards 2020.



"Accessible pricing plays a major part in the own label sector of the frozen category," says **Clare McIntosh Commercial**

Director at Fullers International. "However, this is not the whole story. Retailers use own label to create a unique proposition for consumers - helping them to build loyalty. This is quite often achieved through innovation that is not usually seen in the branded sector."

"Key trends in own label frozen are premium, vegan and free-from, with retailers looking for exclusive innovation to help them stand out from the crowd. In line with all food and drink categories, health is core to many products coming into frozen. Frozen has also seen both higher sales of fruit and morning goods (croissants, pain au chocolate), as retailers and consumers are now discovering that frozen can deliver high quality products with minimal waste. Another trend that is due to the pandemic, people are spending more time at home and want to either have handy snacks available or want a 'night in' where they demand more indulgent products to treat themselves."

Clare McIntosh
Commercial Director, Fullers International

Photo: Street Food Chicken Kebabs
Company: Princes



Figure 8⁽²⁸⁾
Own Label % of Frozen Sales

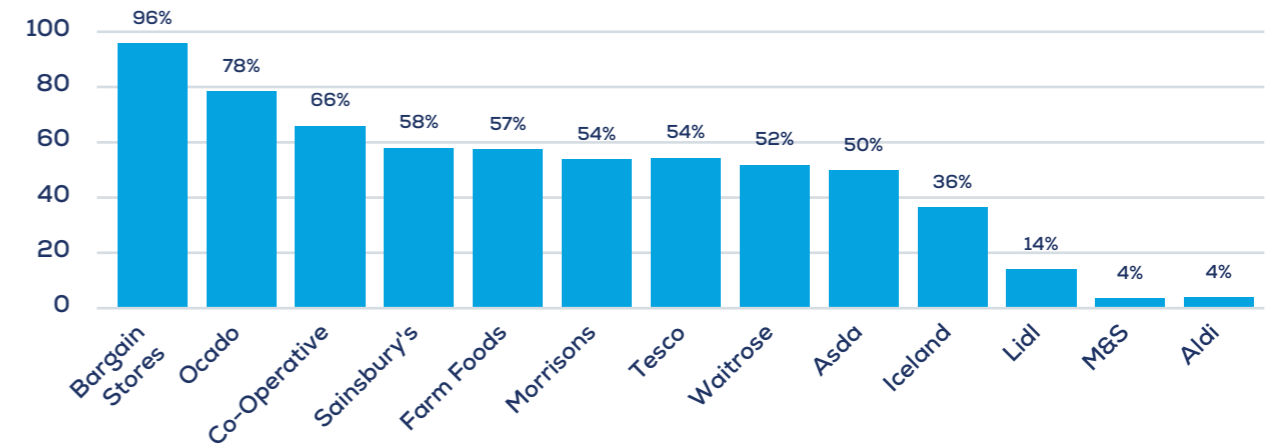


Figure 8: Own label sales by retailer⁽²⁸⁾

While private label remains a significant part of the frozen food category, we have seen major developments from brands in recent years. Nomad Foods with their portfolio of brands, Birds Eye, Goodfella's and Aunt Bessie's, holds 11.1% share of the overall market⁽²⁹⁾.

Frozen has also seen new brands coming into the category in recent years. For example, itsu [grocery] has brought its restaurant quality range of Asian products to the frozen category, growing at 149% year-on-year. This has been particularly relevant during the various lockdowns in 2020 and 2021 as consumers were looking to create out-of-home experiences in the home.



"Retailers are reliant on brands such as itsu [grocery] to provide something more complex that would otherwise take hours to cook from scratch, in a convenient format, ready in minutes, such as frozen bao and gyoza."

Mary Crichton
PR and Influence Manager, itsu [grocery]

Strong Roots is another brand that has driven some unique developments in recent years. As consumers move towards positive health rather than functional health, the plant-based position of the Strong Roots brand has really taken off. With McCain having now taken a minority stake in the company we could see even bigger things.

*"Growing interest in **positive health** means that people are becoming more interested in having a balanced diet through eating well, eating enough fruit and veg, choosing products with natural health benefits (such as fibre, vitamins etc) and eating a varied, more natural and less processed diet."*

*"**Functional health** on the other hand means adopting a more managed approach to healthy eating – choosing products that have a functional benefit e.g. low in fat/salt/sugar, calorie or portion control, or picking diet variants that claim to be lighter."*

Henry Craven Customer Marketing Controller, Froneri



Photo: Mixed Root Veg Fries
Company: Strong Roots

2.5 Pricing



Will Muslek
Senior Category Manager,
Birds Eye

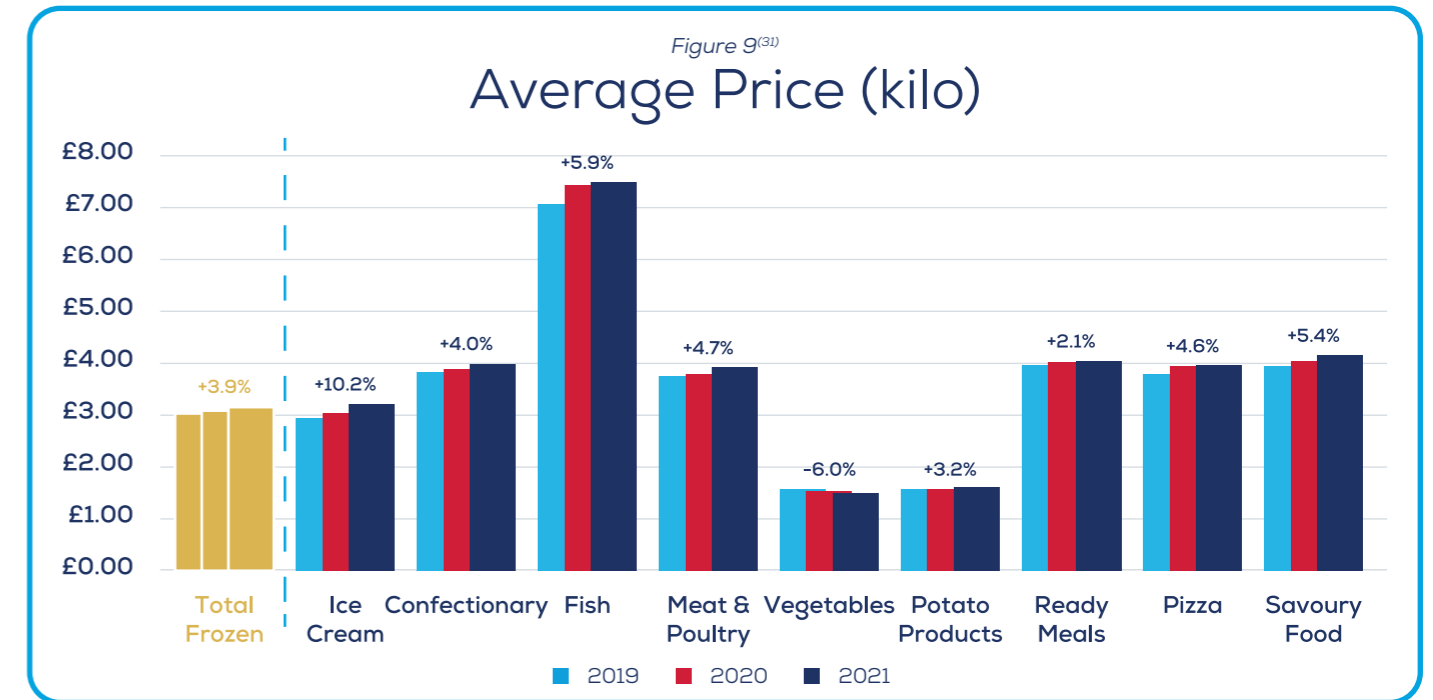
Average prices have risen by 2.1% over the last 52-week period⁽³⁰⁾. We anticipate that prices will rise further in 2022. Indeed, the last 12-

week data shows an average pricing increase of 2.9%, driven by the inflationary factors that are affecting all businesses at present.

Figure 9: Price pressures mount⁽³¹⁾

2021 has been a turbulent year for everyone in FMCG. The frozen category has returned to a form of normality in terms of pricing trends with promotional participation trending back to levels of 2019 in most categories. Still, price matching with Aldi continues to impact prices in some categories. For example, average frozen vegetable prices are down 3.7% in the past year and down 6% since 2019.

Ice cream has seen the highest increase in price (see Figure 9), this is in part being driven by product mix and a slight reduction in the depth of price reduction on promotions. It will be interesting to see the



(30) Kantar 52 w/e 31 October 2021 (31) Kantar 52 w/e 3 November 2019 v 52 w/e 1 November 2020 v 52 w/e 31 October 2021

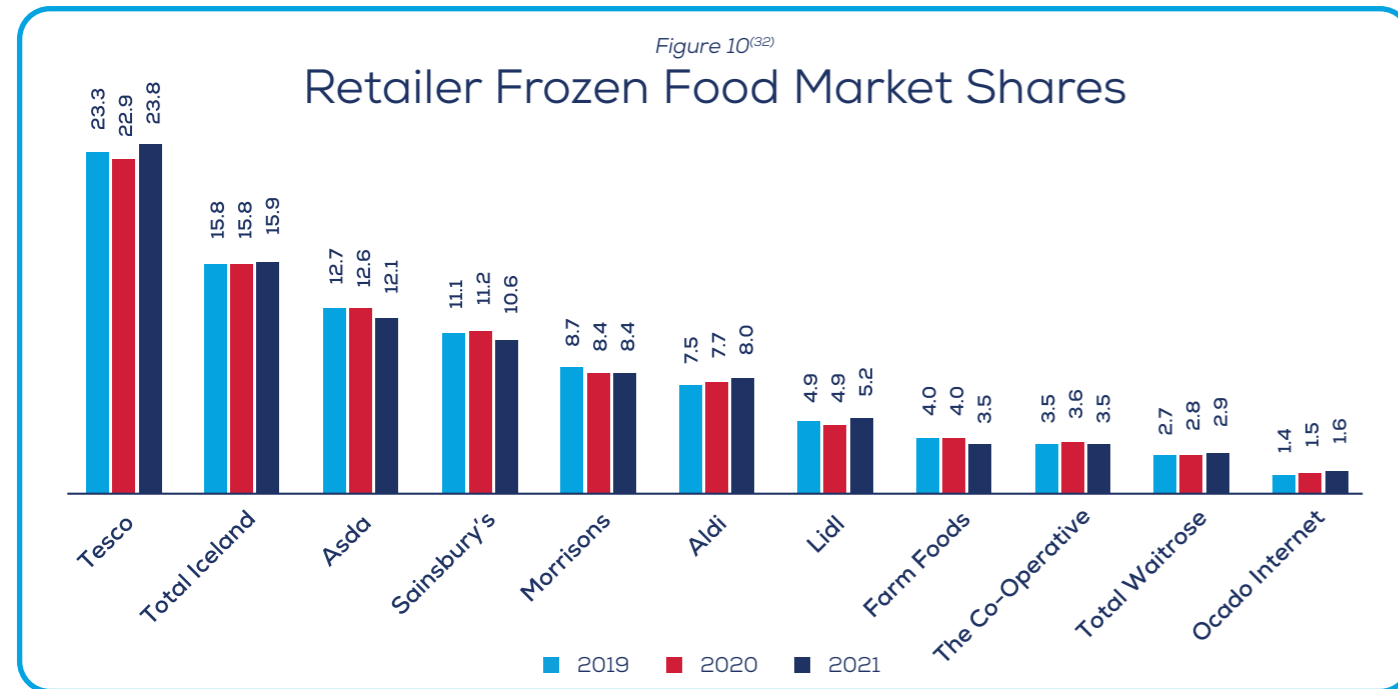
impact of HFSS legislation on this category as this is introduced at the end of 2022. As we have seen, prices have increased in eight of the nine categories reported by Kantar, with only vegetables seeing a decline.

According to Birds Eye, the Tesco Clubcard price strategy, which was first introduced in the frozen food category, has paid dividends for the retailer. It has helped to attract and retain shoppers and encouraged loyalty without deflating the overall offer. Tesco's average price per kg is ahead of the overall market, which combined with an overall share gain, means the strategy is clearly working. 2022 is likely to be a difficult year for some

consumers. Two main macro-economic issues are likely to prevail. Firstly, rising inflation and, secondly, the anticipated 'K' shaped recovery that will see some households enjoying an increase in disposable income due to the pandemic while others are forced to draw in their belts.

Retailers will be keen to ensure that the discount sector does not attract more shoppers as inflation begins to bite. With Aldi and Lidl having a combined share of 13.3% in frozen, they continue to pose a significant threat to the multiple grocers.

Figure 10: Tesco, Aldi and Lidl steal frozen market share⁽³²⁾



Birds Eye notes an increase in the number of meal deals that are being offered in the frozen category. Most retailers have had different variations on this both in store and online, using cross category multibuy or meal deal messaging. This has taken over gondola ends in many retailers with prominent "Big Night In" messaging. This is a great way to improve basket spend and encourage conversion and consumption across the whole of the frozen category.

Greater use of meal deals means competition is set to stiffen in frozen. The last example of this was the rise of the discounters following the last big recession in 2008. With inflation biting, retailers look to attract and retain customers by offering the best value for money possible. Of course, this doesn't necessarily mean prices will be

slashed. Bigger packs that offer better value for money are coming to the fore through the likes of Iceland Food Warehouse. Frozen – naturally cheaper than chilled – should benefit as the economic clouds gather.



"Overall, total food value sales grew by 2% year-on-year, driven mainly by price increases due to range changes in store," says **Michal Weavis at IRI**. "Until recently Every Day Low Pricing and price matching strategies have kept direct inflation at bay in the market, but recent data suggests that we have now reached a tipping point where direct price increases are being passed on to the shopper."

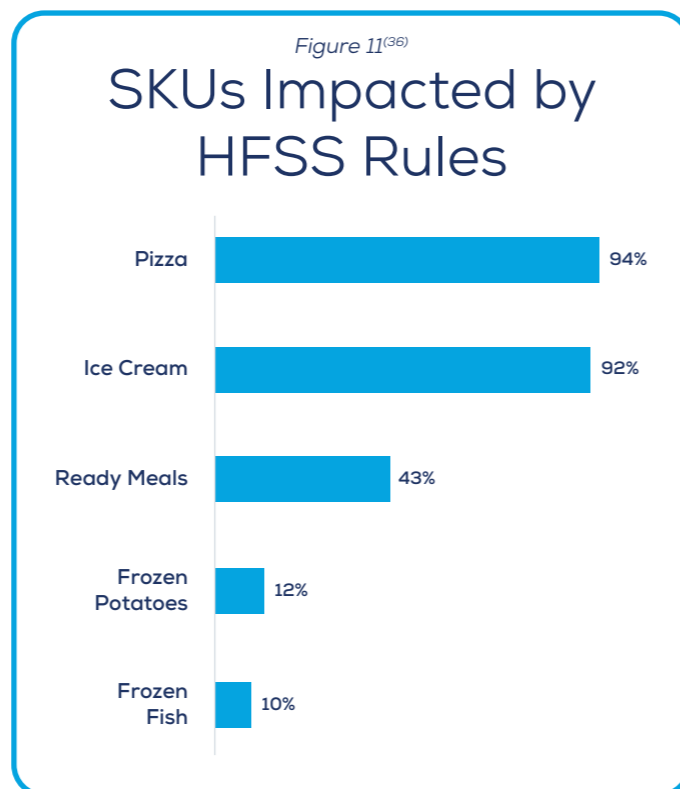
2.6 HFSS

The UK is in the midst of an obesity crisis. Twenty eight per cent of the population is obese and a further 36.2% is overweight⁽³³⁾. As a nation we must act. The Government has now set in principle new rules to restrict the promotion and placement of any product deemed to be unhealthy. This means any product that is high in (saturated), fat, salt or sugar (HFSS) from categories contributing the most sugar and calories to children's diets; as defined by the Department of Health Nutrient Profiling model.

While we await the full details of the legislation, it is clear it will have a major impact on ice cream and pizza. These two categories are worth over £1.9bn to retailers, accounting for over 26% of the frozen category⁽³⁴⁾. Both are driven by promotions in aisle-end cabinets, which will be banned under the new legislation for HFSS products.

Ice cream as a category sells 39% of its volume on deal and pizza is even more extreme with brands seeing over 60% sold on deal in the top four retailers⁽³⁵⁾. It's clear that the new legislation, which is due to come into force in October 2022, will drive major changes in space allocation in the category, as retailers try to protect the lost volume from end cabinets.

Figure 11: How HFSS will impact major frozen food categories⁽³⁶⁾



“Shoppers will continue to look for their favourite ice creams, so even though some unplanned sales will be lost, there will be more pressure than ever on the ice cream fixture to deliver the volume retailers are used to selling from their promotional displays. Together with other treat categories impacted by HFSS, innovation and choice are important factors for ice cream, so we also need to be mindful about removing products or reducing shelf space – if anything, more ice cream fixture space will be needed to maintain both on shelf availability and offer consumer choice. HFSS also

presents an opportunity for retailers to drive more traffic down the much-maligned Freezer Aisle, often criticised for being unimaginative and uninviting. With choice on ends restricted by the new rules, shoppers will naturally have to venture further into the aisle to find what they want, and increased footfall down the aisle is certainly no bad thing for the Frozen Category overall. It presents an exciting opportunity to use fixture space more effectively and imaginatively to highlight new products, promotions and meal solutions to engage more shoppers, something many of us have been crying out for.”

Henry Craven
Customer Marketing Controller, Froneri

“Accessible and attractive healthy, non-HFSS meal choices, especially for children, are among one of the key Government focusses. As these messages filter to the public,



food manufacturers have to be prepared. The need to increase consumption of vegetables, fruits and more healthy and sustainable foods puts frozen food in a strong position to succeed and grow,” says **Kate Forbes, Category Director UK at Birds Eye.**

At the Federation, our major concern is that yet again Government is proposing restrictions on certain parts of our industry that is not replicated outside the home. For example, operators in the out-of-home pizza market with less than 250 employees will not need to meet the new rules. Not only does this create an unfair playing field but it also fails to recognise the fact that in retail prices are reduced and out-of-home products tend to be healthier with larger portion sizes. In the out-of-home market they quite often promote to drive extra volume on a purchase. All we ask for is a level playing field.

However, every cloud has a silver lining and with the end cabinet space becoming free, it could be a great opportunity for more meal deals (see page 33). It will also give retailers and brands the opportunity to bring more innovative and healthier products into the market, and an impetus to renovate consumer favourites to become healthier.

Photo: Smoked Provolone Cheese & Roasted Garlic Flatbread
Company: Iceland Foods



Category sponsored by
KANTAR



“Government strategies to combat health-related concerns could drive more innovation within the frozen category, supporting the argument for additional freezer space in store. Another possible future consideration could be that retailers offer more occasion-based merchandising in frozen, for

example, ‘meal for tonight’. We see this more commonly in chilled, where M&S, the Co-op and Aldi are well known for dedicating space in-store, on feature end to execute. Frozen could look to replicate this by offering a complete meal solution, rather than the traditional category-based merchandising we are used to.”

Kate Forbes,
Category Director UK, Birds Eye

Photo: Steak & Gravy Pies
Company: Heron Foods



3. Foodservice

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Photo: Gluten Free Vegan Chocolate Truffle Brownie Torte
Company: Brakes

3.1 Foodservice chapter champion

Hugo Mahoney
CEO of Brakes*

It is hard to think of an industry more challenged than foodservice during these past two years of pandemic. While we may have yet to see the triumph out of the adversity, the industry has taken steps to 're-set', turning its natural innovative behaviours to the issues of the unpredictability of policy restrictions; the 'on demand' consumer desire for near-instant food; and attracting and retaining high quality staff.

Consumers have shown their unwavering support for eating out, as long as they have the confidence to do so. Those operators who have shown resilience, agility and flexibility to find ways to serve their customer base come what may, have been rewarded. The story of the pandemic has been the significant growth we have seen among quality, independent operators.

*Hugo Mahoney was CEO of Brakes at the time of writing this Chapter Champion intro

The consumer is becoming ever more concerned with food provenance, health, and sustainability factors. Frozen food expansion has been a highlight of the pandemic, giving operators greater flexibility, and more options for staff-constrained environments. It also has a big part to play in offering a predictable, high quality product that can satisfy multiple criteria: clear labelling and ingredients; visible source of origin, and a certain degree of 'hedge' to the high inflation the market will experience on fresh and chilled products.

Perhaps forever the optimist, I believe the industry has in many ways demonstrated its finest hour, showing grit and determination,

but also innovating and problem-solving at pace. Business models have evolved, over-supply has certainly diminished, and the big 're-set' is ready to welcome back the consumer in early 2022; hopefully in their droves, once again.

I encourage you to delve into this chapter. It reiterates the significant opportunity that exists for suppliers in the foodservice market, while showing that we are nearing the light at the end of the tunnel.

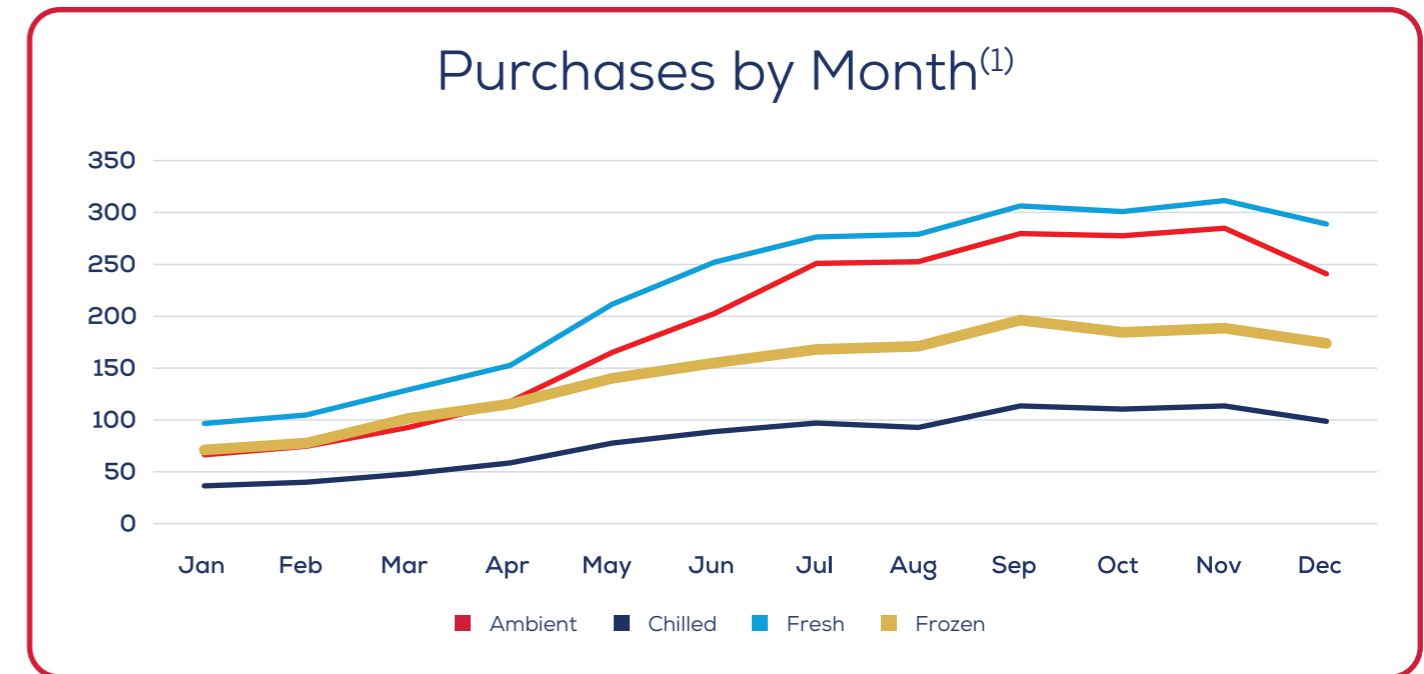
Photo: Ford Farm Oak Smoked Cheddar & Pickle Tart
Company: Brakes



3.2 Foodservice Market

The British foodservice sector has been hobbled by the successive lockdowns, plummeting consumer confidence and deepening disruption to supply chains of the past two years. The HGV driver shortage hit the sector particularly hard, with operators having to compete with the behemoths of grocery retail for drivers. Reports of senior directors of major foodservice suppliers being forced into stints behind the wheels of HGVs abound.

Despite this, there were some bright spots in 2021 and there are encouraging signs of recovery. Restrictions to foreign travel boosted the hospitality sector throughout the summer and innovation and the adoption of new technologies by foodservice operators is gathering pace. Against this backdrop, frozen food is coming to the fore. Its convenience and longer shelf life is allowing operators to adapt to the uncertainty caused by the pandemic and reduce waste, while helping them hit their sustainability targets.



(1) Peter Backman



Photo: Scottish Smoked Salmon Slices
Company: Young's Foodservice

3.3 Overview of 2021



Peter Backman
Foodservice Analyst

If 2020 was year one of the Covid era, when foodservice was grappling with existential questions about its future, 2021 was year two, when many of these questions

were starting to be answered. But it was also a year overlaid with issues that were not foreseen at the start of the pandemic.

Chief amongst these were massive changes arising from disruptions to supply chains, coupled with rising inflation on many fronts – especially to the three expenditure categories that account for 80% or more of foodservice operator costs: labour, food, and fuel.

That is the background to the changes that have fundamentally influenced foodservice in the past year. A key component of the actual changes is, in a single word, demand. Consumers have been bedevilled by a range of issues – generalised anxiety (even fear), changing lifestyles, new expectations, financial concerns and disrupted work and travel patterns. At a more specific level, a pattern of “pingdemics” restricted hundreds of thousands of individuals and families to self-isolation.



Photo: BBQ Lentil & Mixed Seed Burger
Company: Paramount 21

These issues have had a major impact on the sector. Not least were the effects of Government actions and regulation over lockdowns – the country was locked down for the first four months of the year; these lockdowns were subsequently, and slowly, mitigated in the foodservice sector so that by mid-July there were no meaningful restrictions on eating out.

In the first quarter there was very little eating out activity; the second quarter saw growing, but still limited, demand; in the summer, eating out started to flex its muscles; and in the final quarter Omicron appeared, once again dampening demand.

Within all these changes, the eating out market is likely to have reached food and beverage sales of £32 billion – 61 % of 2019 figures but up by 43% on 2020. Encouragingly, the run rate in the final quarter has been on a par with 2019 (although inflation has helped)⁽²⁾.

Two sectors in particular did well above the average in terms of food purchases (supplier sales), in the past year – healthcare (especially hospitals) and public services (military, prisons etc). The reasons for this positive picture are clear; these sectors perform basic social functions which cannot be reduced, even during a pandemic.

Education also performed well but its overall performance, in the first half of the year, was marred by rolling programmes of exclusions, in unpredictable steps, as Covid took hold in school classes and year groups.

During the summer, with the lifting of lockdown restrictions and a general desire to 'be normal,' the shackles were being removed from customers' ability to eat out. While overseas travel was severely restricted for holidays (and business), Brits took advantage of holidaying at home – the staycation market did extremely well. That meant that hotels, restaurants and pubs, especially those in holiday destinations, traded at fairly high levels during the summer. Although this was a boon for the hotel sector too, the increased demand was insufficient (and generally in the

'wrong' regions) to overcome the massive reduction in business guests.

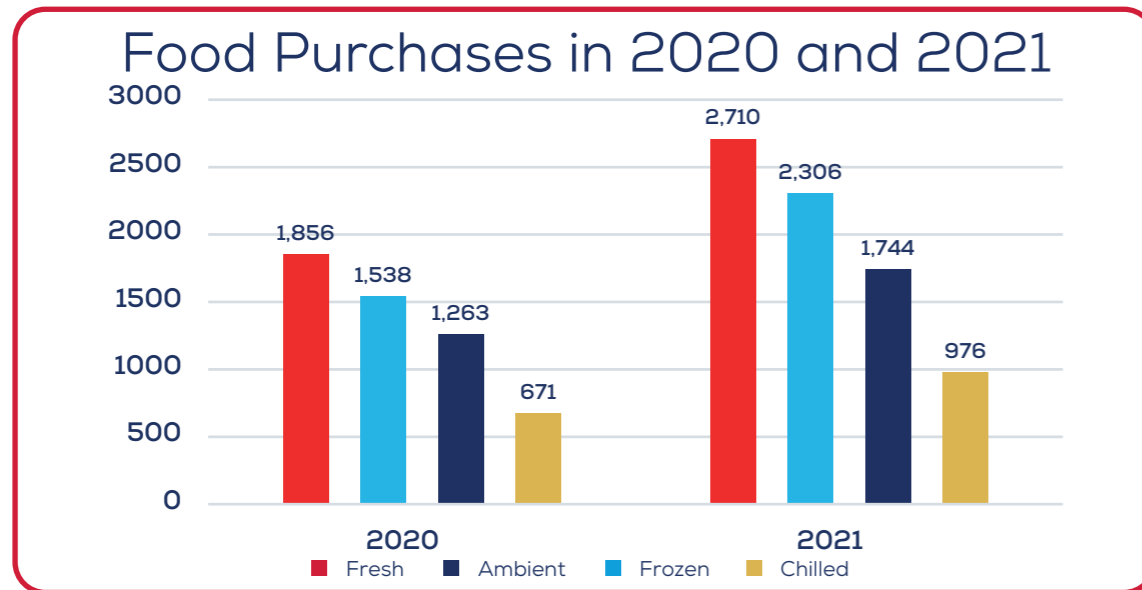
Nevertheless, the boost from staycations, while diminishing, continued into the autumn and pre-Christmas period with the result that restaurants – both full service and quick service – performed reasonably well in the second half of the year, considering the severe omicron-induced disruption to trading patterns over the Christmas period. Pubs also showed improvement but not as much as restaurants. Meanwhile, operators in London, especially in central business locations, were still trading at levels noticeably lower than historically, because of continuing, though reducing, levels of working from home.

In overall terms, during the year, food purchases followed changes in operators' sales, with restaurants, pubs and hotels showing an increase of 46% over 2020. Within this, frozen underperformed somewhat with a growth figure of 37%⁽³⁾. This difference was due to the relative performance of sectors rather than to any structural shift in demand for frozen – indeed it would appear likely that those operators and sectors that over index on frozen will see faster growth in 2022 as they grow from a lower base than most other sectors.

Peter Backman is recognised as one of the foremost analysts and commentators on the foodservice market.



Photo: Camembert En Croute
Company: KK Fine Foods



(3) Peter Backman research, Q4 2021, based on Market Structure and Trends



Photo: Vegan NGCI
Raspberry Frangipane
Company: Destiny Foods

3.4 Frozen foods play an increasingly important role



Ongoing uncertainty in the market puts frozen food in an ideal position, says **Coral Rose, Managing Director at The Country Range Group**. "With the pandemic and ensuing lockdowns leading to many kitchens operating with reduced staff and sometimes sporadic delivery options, frozen food is even more vital for caterers than it's ever been," she says.

"Not only do frozen foods offer fantastic value, but they also require less preparation and are easier to store for kitchens lacking the time or space to prepare meals from scratch. Frozen food also allows caterers to offer the same high-quality dishes day in, day out, without waste. Frozen reduces the chances of popular meals becoming unavailable or out of stock. Being able to rely on a core range of quality frozen food



items can be vital in helping kitchens stay open during these difficult times."

This view is re-enforced by Brakes. "Frozen declined by 6% less than chilled over the course of 2021,"

says **Strategic Merchandising and Pricing Director, Charlie Burton**. "Our analysis suggests that this switch was a function of customers changing their behaviour, as opposed to the vagaries of sectoral mix fluctuations during and post lockdown."

He continues: "Many customers have reduced the number of dishes offered on their menus, favouring a 'back-to-basics' approach; doing a few things well. In this context, the lower selling proteins (duck, corn fed chicken breasts, etc) were still easier to manage in frozen rather than chilled. Traditional favourites like burgers and pizzas drove even more growth into frozen."



Frozen processed poultry supplier Meadowvale says the switch to frozen is ongoing. "Increasingly we are working with businesses to move their kitchens from raw to frozen," says **Head of Marketing, Lewis Wantling**. "Preparing

their own batter, buying the ingredients for the marinade, and marinating the chicken overnight are just a few of the extra processes needed when preparing fresh. Many of our customers have tried and failed to prepare their own fried chicken with the quality and consistency varying drastically."

So frozen is increasingly viewed as a superior option in terms of both quality and convenience. And not just in poultry.



Photo: Alaska Pollock & Pink
Salmon Pieces
Company: Young's Foodservice



"Thanks to the introduction of micro-misting and more powerful and rapid deep freeze technologies at lower temperatures, the freezing process captures seafood at pristine quality," says **Adrian Greaves, Foodservice Director at Young's Seafood.**

"This breakthrough now allows operators to buy seafood that is frozen a few hours after being harvested. Therefore, in many cases, frozen seafood can in fact be fresher and in better condition, than fresh itself.

"Since frozen fish and seafood helps menu planning and portion control, and helps to reduce waste, it is a great ingredient that all busy kitchens should be stocked with. Frozen seafood also helps to extend the seasonality

of multiple species making it easier for caterers to offer a wide variety of seafood species on menus throughout the year."



"Menus have had to adapt in order to tackle the challenges the industry faces," adds **Ashley Hopwell, Commercial Director at Hopwells.**

"Ordering patterns show that venues now want quicker-to-serve food to help them reduce overheads and customer waiting times. Coated products such as poultry and seafood have performed well, but coated fries have seen the biggest uplift. Staying hotter and crispier for longer is seen as a particular benefit that works well for home delivery services, as well as dine in."



Photo: Forest Fruits Ice Cream Company: Hopwells



Foodservice has been a hotbed of innovation throughout the turmoil of the pandemic. Here's **Charlie Burton, Strategic Merchandising and Pricing Director at Brakes'** take on the key drivers of innovation:

■ **Transform into takeaways**

Many hospitality establishments have flipped their business models to transform into takeaways – this has driven proliferation of products more suited to takeaways and delivery.

■ **Individually wrapped products**

Decreased product handling has resulted in more products being individually wrapped to minimise handling due to Covid.

■ **Clear ingredient and nutrition information**

Products are now required to have clear nutrition and ingredient information following the introduction of Natasha's Law in October 2021.

■ **Supply chain issues**

Supply chain issues – once hospitality re-opened, menus were much more 'back-to-basics' in response to reduced product availability.

"Frozen seafood provides operators with many benefits, and therefore it is no wonder it is utilised on menus throughout the foodservice industry. In busy foodservice kitchens, it's important to have products to hand that do not compromise on quality yet help reduce the risk of wastage – frozen seafood does exactly that. It provides consistent portion control and allows caterers to bulk buy more efficiently."

Adrian Greaves
Foodservice Director, Young's Seafood



Photo: Pecan & Cranberry Tart Company: Brakes

3.5 Challenges

Examples of the challenges faced by foodservice operators and their suppliers abound. Reduced footfall, labour shortages, supply chain issues and the pressing need to keep staff safe are forcing operators to adapt.



"We have successfully adapted to pandemic restrictions in line with the Government guidelines and introduced additional measures for the safety of our staff and customers," says **Mary Wedge, Business**

Development Manager at Anglia Crown,

which supplies chilled and frozen prepared meals to the healthcare sector.

"Some of the measures included the introduction of temperature checks in line with GDPR guidelines, mandatory facial coverings, social distancing in our production facilities, a logistic plan to minimise drivers' social contact, and increased hygiene measures. Moreover, during the peak of the pandemic, Anglia Crown launched an urgent recruitment appeal to fill more than 60 newly created positions, including vacancies for kitchen production, store operatives, packing and many more."



Photo: Salt & Chilli Shredded Chicken
Company: Meadowvale Foods



"Pay is the first thing people consider when it comes to staffing, but we have had to consider the full employee experience. To do this we have created a strategic team who look at the

total package, holiday entitlements, benefits, and seasonal bonuses to ensure that staff are competitively remunerated and feel valued."

Samir Edwards

Managing Director, KK Fine Foods



Photo: Fiesta Fries (Rainbow Fries)
Company: Farm Frites



Billington Foods has also introduced new ways of working. "We had very close working relationships with our customers and this benefited our position through the lockdowns and subsequent reopening," says **Marketing Director, Nicola Mills**.

"We have implemented weekly stock calls, to understand demands and requirements

and worked with customers to understand if there are lines that can be consolidated to ensure supply chain challenges are reduced for our customers and ourselves. We've prioritised products that support back-of-house operations and require less contact for staff; products such as fully-finished meals, pies and ready-to-eat desserts. We've also worked with customers who've reduced menus and used our lines to support their teams in kitchens".



Photo: Beef & Abbott Ale Pie
Company: Billington Foods



Photo: Spicy Sweetcorn Fritters
Company: Paramount 21

"The shortage of skilled people in the kitchen and front of house, has led to reduced operations and changes to how venues operate. Some have taken the decision to reduce hours of service during the day and, in some cases, reduce the number of days they open. Thankfully, technology has been able to lend a helping hand with the introduction of ordering apps to help reduce the number of employees needed at any one time."

Ashley Hopwell
Managing Director, Hopwells

3.6 Consumer motivations

CGA BrandTrack data shows that Covid has also sharpened consumers' focus on health. Nearly three quarters (72%) of adults now proactively try to lead healthy lifestyles – an increase of 10% points in little more than a year – and numbers seeking healthier food options, or following diets such as veganism, are likely to increase⁽⁴⁾.

There is heightened awareness of climate issues too, with the same proportion (72%) of people now taking sustainability credentials into account when they choose where to eat out. All food and drink brands are under growing pressure to reduce their environmental impact by addressing issues connected to packaging and sourcing.

Consumers are increasingly unforgiving of companies that fall short of their values.

Considerations related to health and sustainability are driving a boom in plant-based NPD, with Brakes pointing to the plant-based Cumberland sausage it launched in 2021 as one of its most successful innovations of the year. The growth of vegan meat-alternative products such as burgers, sausages and mince show no signs of slowing and are now extending into meal solutions.

Consumers are also looking for more indulgent products. This, in part, is down to the fact that foreign holidays have been mostly off-limits for the past two years, so more people have been looking to treat



themselves in British holiday parks, hotels, pubs and restaurants. "A 'staycation' is now a big thing, with UK holiday destinations benefiting massively from travel restrictions," says **Ashley Hopwell, Commercial Director at Hopwells.**

"We have seen a surge in demand from this segment and a shift towards more premium products. Holiday makers are prepared to pay a little more if it enhances their experience. This is not a trick that's been missed by foodservice manufacturers either, as once staple products are now receiving a makeover and we're seeing premiumisation across many areas including doughnuts, waffles, and even whippy ice cream."



Coral Rose at The Country Range Group agrees. "In the last few months, our indulgent lines have seen strong interest after we added two frozen and pre-

portioned bite-sized dessert selections," she says. "As well as tasting sublime, they come pre-prepared and just need to be defrosted before serving so are ideal for busy kitchens. After experiencing lockdown and venue closures for many months, consumers are looking to try eye-catching desserts full of flavour and excitement."





Photo: Alaska Pollock & Pink
Salmon Pieces with Noodles
Company: Young's Foodservice



"The aftermath of Covid means people are looking for more individually flow wrapped products. Another one of our most successful launches in the last year has been our individually wrapped danish pastry selection."

Charlie Burton

Strategic Merchandising and Pricing Director, Brakes



"We have developed Free From Fish Fingers to taste just as good as the original recipe. The crispy golden breadcrumb is so good that both those with or without allergies can enjoy completely. Whilst having gluten-free alternatives is important, it is even better for saving freezer space and avoiding cross contamination, if the free-from product is so good that it is the best option for both free-from and traditional customers."

Adrian Greaves

Foodservice Director at Young's Foodservice



Photo: Chinese Style Salt & Chilli
Crispy Shredded Chicken
Company: FBI Food Group

3.7 What to expect in 2022



Simon Stenning

Founder, FutureFoodservice

2021 was a 'Great Reset' for the industry as we emerged from lockdowns and restrictions with many casualties, changes in consumer behaviour, economic damage and a change in the nature of hospitality experiences. Much of this will linger into 2022, as consumer demands and market dynamics continue to shift.

Many of the sites closed by casual dining chains in 2020 (the Top 40 chains shut 21% of their outlets that year⁽⁵⁾) are now being re-opened as differing formats, with fast food brands expanding significantly. We have seen new openings for Five Guys replacing ex-Pizza Hut sites, Jollibees replacing Bella Italia, Loungers taking ex-Pizza Express sites, Ole & Steen replacing Café Rouge, and Honest Burger and Slim Chickens replacing Carluccio's. All of these examples reflect the new dynamics that are reshaping foodservice.

(5) FutureFoodservice w/e 31.12.2020 vs 31.12.2021



Photo: Plant-based Southern
Fried Goujons
Company: Creative Foods

Consumers are being polarised into ‘cash rich/time rich’ or ‘cash poor/time poor’, by the increase in home-working and reduced commuting costs, or the rise in the gig economy allowing people to have two or three jobs at the same time but leaving little room for leisure or personal chores. This is reflected in the growth of fast food at one end of the polarised scale and experiential dining at the other.

Consumers are becoming more conscientious. They want to look after the planet and society and are caring more; they’re purchasing products and services that have a greater societal purpose. Sustainability, community and wellbeing are elements of business that have become necessities, rather than mere ‘nice-to-dos’.

The macro factors driving change in the foodservice industry include the economic impact of rising inflation, especially in the food supply chain, which is pushing price rises onto menus and dampening consumer demand at a time when disposable income is being squeezed for many.

The VAT increase back to 12.5% in October 2021 has not helped with this inflationary pressure, and we will see this worsen in April when VAT returns to 20%. We forecast that around 3% points will be passed on in higher menu pricing, and operators will take a revenue hit of some 4.5% points, slowing the industry down. We expect that supply chain disruption will continue well into 2022, creating further upward price pressures. However, we anticipate that this will settle down in the second half of the year.

Whilst a previously predicted increase in unemployment was held off by the Government extending the furlough scheme, we now have the problem of too many vacancies, which is stifling trading abilities as operators cut back on service times and trading days. This is a long-term problem which the industry will try to tackle through recruitment campaigns.

We will also see greater utilisation of technological solutions such as replacing frontline order-taking staff with digital ordering screens. Operators such as itsu, Tossed, Leon and HOP are changing in this way, focusing their staff on preparing fresher food for personalised customer demands.



Photo: Butter Bean, Sweet
Potato & Spinach Stew
Company: Paramount 21

Technology will continue to play a more important role in foodservice through the following ways:

- 1 Digital ordering extending into voice-activated ordering.
- 2 Order & Pay apps and payment solutions will build on recent acceptance of QR codes.
- 3 Automated vending solutions and robotic arm concepts such as the Karakuri robot meal preparation kiosk will provide greater range of prepared and re-heated foods.
- 4 Pick-up automated lockers for click & collect food orders that suit consumer flexibility demands.
- 5 Dark kitchens and virtual brands, such as the recent launch of DJ Khaled's Another Wing delivery concept which went live at 165 restaurants globally on the same day.
- 6 Light kitchens where delivery menus are provided from a separate area of the kitchen and separate entrance, such as ATIS in Victoria.

Consumers have become more exposed to delivery solutions as the reach of the delivery platforms has extended. This element of foodservice will continue to grow. Consumers now expect to be able to get what they want, when they want, and where they want it. This is being developed in ways such as the OrderPay app working with What3Words to enable foodservice delivery to whichever 3m square space a consumer is in, such as parks, festivals and events.

Operators will need to embrace all these developments to make the most out of the opportunities, and we will see operations change to simplify menus and preparation, manage dynamic pricing and leverage the delivery opportunity. We also forecast more stretching out of day-parts to relieve pressure points and assist in staff retention, as well as a move towards four-day working weeks.



Photo: Gluten Free Range
Company: Dawn Foods

So, 2022 will see the start of 'The Next Era'. Whilst many challenges continue, a return to normality will help foodservice recover further. Our forecasts include the following developments:



Value propositions will become more important. Conversely, there will also be scope for greater premiumisation.

£95 billion

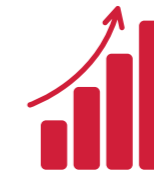
Total foodservice market to reach more than £95bn in 2022, which is still 5% below 2019 levels.



More-premium offers will need to offer an exceptional experience that delivers great perceived value or ensure that there is a value-driven element to their offer.

3%

VAT increase in April will impact revenues (pushing down by 4% points) offset by menu pricing increasing by 3% points. Overall inflation will dampen consumer demand.



Fast food, pubs and restaurants will recover, but business and industrial contract catering and city centre venues will take longer to return to full capacity.

We don't expect a full return of inbound tourism until at least 2023, but domestic staycations will provide some balance. CGA data shows that there is no escape from the damage that Covid and months of lockdown have inflicted. In the 12 months to the end of September 2021, operators were £60bn short on 2019's turnover, pushing total losses well past £100bn⁽⁶⁾. Britain now has at least 10,000 fewer licensed premises than it did before the pandemic hit⁽⁷⁾.



Photo: SuperCrunch
6mm Skin On Fries
Company: Aviko

4. Sustainability

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Photo: Fish Tacos
Company: Young's Seafood

4.1 Sustainability Chapter Champion

Cameron Moffat
Sustainability Manager, Young's Seafood

Whilst Covid-19 still dominated headlines in 2021, its ubiquity seemed only to be challenged by the prevalence of stories relating to sustainability and climate change in the media. From the World Meteorological Organisation's flagship 'State of the Global Climate' report warning that the global average temperature had already risen by approximately 1.2 degrees, to the widespread protests by Insulate Britain making front page news, 2021 felt like a real step change in the climate conversation. Nowhere was this more evident than at the COP26 summit at the end of last year, where 100,000 people took to the streets of Glasgow to demand more action from the world leaders negotiating the approach to limit anthropogenic change. The people have spoken and now is the time to act.

The British frozen food industry has always had particularly strong messaging relating to production of safe, nutritious goods with minimal food waste. Nevertheless, the manufacturing, storing and transporting of frozen goods is an energy intensive process that needs immediate attention if businesses are going to transition to Net Zero.

This topic remains a huge piece of the puzzle in assuring sustainable food systems both in the UK and its complex global supply chain. Whilst challenges in the availability of accurate and consistent data in this area still exist, businesses are increasingly aware of its necessity and are engaging with the tools needed to transparently report it.

As we look forward to 2030 and beyond, increasingly climate conscious consumers will be looking for the simplest way of reducing their environmental impact. A trend that is set to grow over the next few years is footprint labelling on pack, with detailed recyclability and emissions information influencing buying decisions.

This movement is supported by a recent EY report that noted "Gen Z and Millennials are much more likely to favour sustainable lifestyle choices, such as plant-based diets and use of public transport. They are more likely to share information about products that are good for the planet with their friends and peers". Businesses in the frozen

food space like Quorn have already made headway with this and have shown the possibilities of offering these eco-aware consumers of tomorrow more robust information on the products they are buying.

The term 'Sustainability' can mean many different things to many people. From the responsible procurement of raw materials, to the management of water and waste, or the effectiveness of a business's human rights due diligence procedure. This is why this year's formation of the BFFF Special Interest Group on Sustainability is a fantastic step forward for the Federation. By using collective knowledge, effectively allocating resources and sharing insight, we will have the ability to better address the holistic challenges our industry faces.

With this being said, I am very proud to be this year's Frozen Food Report Sustainability chapter champion and I welcome you to read on into the chapter's insights.



Photo: Battered Chip Shop Fish Fillets
Company: Young's Foodservice



Photo: Smoked Haddock Fillets with
Cheese & Chive Sauce
Company: Young's Foodservice

Company: Ardo



Sustainability is the number one priority for the BFFF's members. In a recent membership survey, sustainability was revealed to be the most important issue for 98% of respondents. This is perhaps no surprise, given the increasingly dire warnings that are mounting about humanity's impact on the planet. It's clear that we all need to act now.

The big question is, what do we as an

industry? It's clear that sustainability is a complicated and all-encompassing topic. As Cameron mentions in his introduction, sustainability means various things for different categories and countries. So, in this chapter we explore the initiatives that various BFFF members are undertaking in this area.

Richard Harrow
Chief Executive, BFFF

4.2 The BFFF Special Interest Group (SIG) on Sustainability



Cameron Moffat
Sustainability Manager,
Young's Seafood & BFFF
SIG Sustainability Co-
Chair



Ben Rouncefield-Swales
Director: Optimisation
Services, Inspired
Energy & BFFF SIG
Sustainability Co-Chair

Earlier this year, the IPCC Sixth Assessment Report painted a bleak picture of our world's future without significant and urgent change, with the UN Secretary-General António Guterres going as far as saying "the Working Group's report was nothing less than a code red for humanity. The alarm bells are deafening, and the evidence is irrefutable." From ocean acidification to extended heatwaves and altered rainfall patterns, all businesses, but particularly those involved in global food systems, will be impacted by the effects of climate change.

As Governments around the world set targets, it is not just evolving legal requirements from national responses that we should be cognisant of. The rise of conscious consumers in the market has led



Photo: Pecan & Irish Cream Blondie
Company: Destiny Foods

to a shifting attitude in the way consumers interact with brands and their products. This shift in consumer attitude has been accelerated to some extent by Covid-19 and the movement to “Build Back Better.” The Global response to Covid-19 has also proven that dramatic and rapid change is possible if communities and countries pull together. In a 2019 NielsenIQ survey, 73% of global consumers said they would definitely or probably change their consumption habits to reduce their impact on the environment.

Where a business’s Corporate Social Responsibility team was once considered an additional headcount or a separate department, it is now clear that a sustainable

ethos needs to be interwoven into all functions of a modern business. It should no longer be one person or team’s job to care about sustainability and its implementation, but rather everyone should understand their role in contributing to a sustainable future.

The BFFF’s new SIG on Sustainability has been assembled to help the Federation lead and guide the industry policy on climate change and the wider sustainability agenda. The sustainability SIG can play a pivotal role in both aligning the Federation with the UN’s SDG and helping the BFFF members better engage with this important topic through collaboration and shared learnings.



Photo: Soya Mince Pasta Bolognese
Company: Anglia Crown



The SIG on Sustainability’s purpose is to:

- **Align with relevant UN’s SDG**

Align the federation with relevant elements of the UN’s sustainable development goals.
- **Highlight schemes and initiatives**

Bring members’ attention to the relevant sustainability schemes and initiatives that could be of use and interest.
- **Provide guidance on best practice**

Disseminate information and provide guidance on best practice generally with regards to sustainability and

- climate change and provide examples of success from within the industry to share with the SIG.
- **Provide a forum for knowledge and issues**

Provide a forum where knowledge can be shared amongst federation members with regards to climate change and wider sustainability issues.
- **Support the journey to Net Zero**

Support our members with information and resources on the journey to Net Zero.

4.3 Meet the members: NewCold Advanced Cold Logistics



Ross Hunter

VP Commercial UK, NewCold
Advanced Cold Logistics

At NewCold, our strategy is based on striving to increase global food security by providing leading food companies with the most

innovative cold storage and transportation services. The company has an international network with 11 locations on three continents with over 927,000 pallet positions worldwide.

Always striving to reduce the impact of their operations on the environment and local communities, NewCold optimise existing and new innovative concepts in the cold chain to achieve the best for their customers and the industry at large. We believe that the efficient usage of natural resources, together with healthy local community and employee relations, are key elements which lead to outstanding financial results and business prosperity.

In keeping with this philosophy, NewCold incorporates a Triple Bottom Line framework in its core operations, which enables the evaluation of company performance from different perspectives while creating



Photo: NewCold Advanced Cold Logistics

greater overall transparency. This approach embraces three distinct criteria: Planet, People and Profit.

Firstly, NewCold recognises that all our facilities consume energy and use air and water for cooling purposes, so we employ sustainable solutions wherever possible. We regard our people as our greatest strength and most valuable asset. NewCold encourages all employees to focus on creating customer satisfaction, to promote long-term customer relationships and sustainable revenues. Thirdly, NewCold employs the simple formula whereby efficient operations combined with satisfied customers contribute to a competitive advantage, which in turn leads to commercial success.

This sustainable methodology is the driving force behind the success of NewCold's existing Wakefield site and is already providing the operational foundations for a new deep-freeze facility due to open in Corby late in 2022. As with all of our sites worldwide, our focus at the new Corby facility will be on sustainability. Both the Wakefield and Corby sites are fashioned on our unique cold store design and use around 50% less energy than conventional stores. This, coupled with our ability to reduce food miles by using high-volume trailers, will greatly reduce CO2 emissions and energy use.

The new Corby facility sits on a 23-acre plot which is a prime location in the logistics 'golden triangle'. The site is close to the frozen distribution centres of many retail

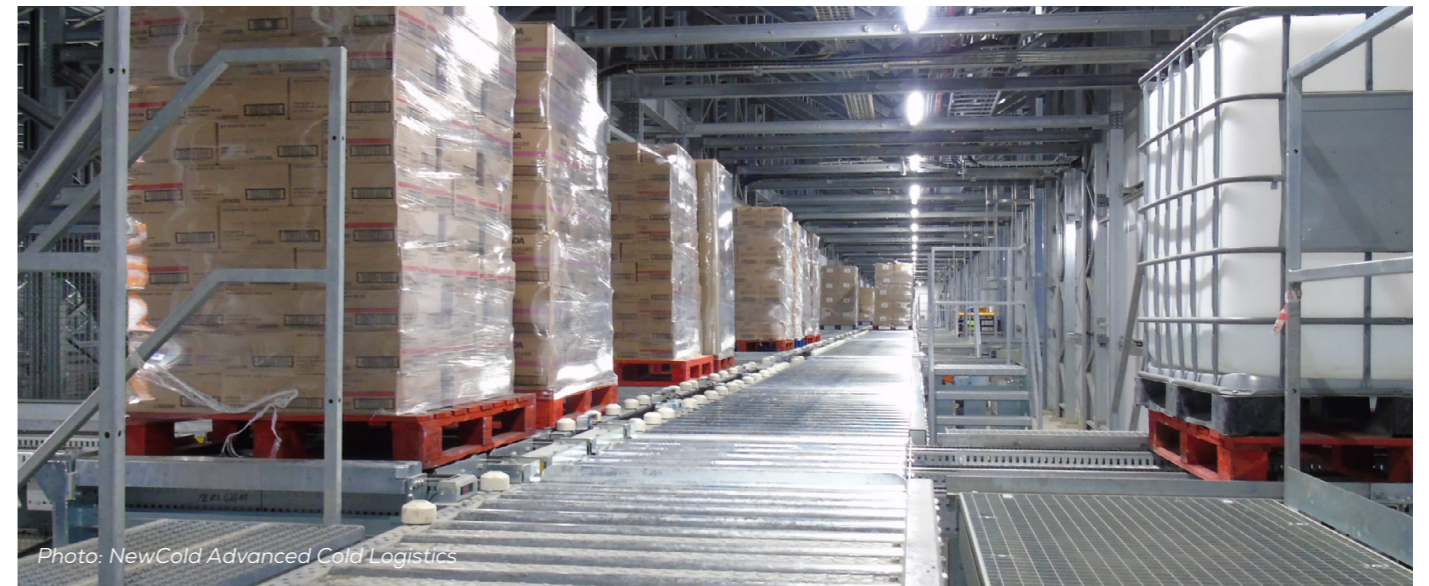


Photo: NewCold Advanced Cold Logistics



Photo: NewCold Advanced Cold Logistics

and foodservice customers and is perfectly located to help minimise consignment handling and logistics costs. Key to the delivery of NewCold's energy efficiency is the company's state of the art warehouse management systems and fully automated handling equipment. These include FEFO handling (First Expired, First Out); shipment buffer zones to minimise truck waiting times; automated storage and racking; bespoke picking floors with automated replenishment and pallet discharge. All of which combine to increase efficiency and reduce energy consumption.

The Wakefield facility, with a footprint of

129m x 170m and storage height of 41m, handles 4 million pallets annually and can receive and dispatch up to 18,000 deep frozen pallets in a single day. To help control this colossal, non-stop operation, NewCold uses a proprietary Warehouse Management System (WMS) which is produced by daughter company Davanti Warehousing. Working in the company's eleven facilities around the world, the cloud-based system, called CORAX, employs Saas (Software as a Service) to control all movements in the operation, while providing constant real-time information regarding consignments and equipment performance.

4.4 Meet the members: Greenyard UK



Ellie Wood

Sustainability and Environmental Compliance Officer, Greenyard UK

Our UK sustainability strategy draws on our guiding corporate vision: to make lives healthier by helping people enjoy fruit and vegetables at any moment, easy, fast and pleasurable, whilst fostering nature. Our aim is then to minimise environmental damage from our operations by focusing on three key

areas: energy usage; water usage; and our overall carbon footprint.

To facilitate this progress, we have introduced a dedicated resource to focus solely on sustainability supported by our Environmental and Sustainability Committee. An analysis of our carbon footprint based on the GHG Protocol shows that three quarters of our greenhouse gas emissions lay outside our direct operations and are within our supply chain. The two largest contributors are related to agricultural activities and transport – both of which are at the heart of

We recognise that real progress comes from close collaboration with our key stakeholders, so to target improvements in these areas we have:

- **Established support networks**

Established support networks with our growers to assist in their data submission on a specialist software platform. This calculates carbon footprint in relation to crop type, area, specific growing conditions and chemical additions. By quantifying each grower's 'emissions hotspots' we

are able to model how emissions can reduce the carbon footprint.

- **Quantified emissions**

Our main supplier of transport distribution quantifies emissions per km travelled and ensures that all deliveries are full, which avoids unnecessary trips, minimising food miles. This in-depth information allows us to target improvements such as route optimisation, back hauling and so on.

Ellie Wood
Greenyard UK

SUSTAINABLE DEVELOPMENT GOALS



our business.

Looking at other elements of our sustainability agenda, we endeavour to maintain a consistently high level of social and ethical compliance throughout the supply chain within all aspects of our involvement from farm to fork. Strong stakeholder relationships are fundamental to achieving long-term sustainability, supporting SDG 12 Responsible Consumption and Production.

Our Scope 3 emissions are the single biggest

element of our carbon footprint, but we have already made significant progress in reducing our Scope 1 & 2 emissions. In line with the Greenyard Group science-based targets, our UK emissions reduction targets follow the same 1.5°C trajectory. To achieve this goal in the long term, the environmental team identifies changes and projects which can be applied to improve efficiency, reduce energy usage and, in turn, our carbon footprint throughout our operations.

From data analysis, we see positive impact from these initiatives. Since 2015 our direct carbon footprint has decreased by 40%,

despite growth in production. Since 2016, we have achieved consistent reductions in CO₂e (equivalent) emissions per tonne of product processed, from 246kg CO₂e in 2016 to 171kg CO₂e in 2021, a reduction of 30%. Our on-site renewable energy generation plays a large role here. We aim to increase the amount of 'green' energy consumed.

Our journey began in 2016 with the installation of solar panels on the cold store roofs, producing an average annual output

of 2.5 million kWh, which contributes 5% of total site electricity use. Our Scope 2 emissions from electricity usage would be 11% higher without the input from on-site solar panels and biogas production. This kind of success allows our customers to put trust in our sustainability ambitions and simultaneously supports SDG 7 Affordable and Clean Energy and SDG 13 Climate Action.



Photo: Steak and Mushroom Stroganoff
Company: Anglia Crown

Category sponsored by

sales-i



A wastewater treatment plant was installed in 2016 to treat all processing water through mechanical and biological processes, ultimately producing valuable resources from what would otherwise be a waste product. This plant cleans water prior to sewer discharge, reducing the organic pollutant load. In 2019, following design optimisation, we advanced this process by installing a biogas storage facility. This “dome” works in conjunction with the treatment plant; capturing biogas which is produced as a waste product from the anaerobic treatment process to supply a 600kW CHP (Combined Heat and Power Generator).



The CHP produces electricity to help power our operations, and the resulting heat is used to heat water during processing. This plant therefore supports SDG 9: Industry, Innovation and Infrastructure.

As well as “cleaning up” our wastewater, the treatment plant also has systems which help us manage our water usage and target reductions. We challenge ourselves to reduce the average volume of water used to process each tonne of product, becoming ever more important as water scarcity increases globally (SDG 6 Clean Water and Sanitation). We are also working to map water risk for our entire grower base globally.



Photo: Mangalorean Roasted Cauliflower & Spinach Curry
Company: KK Fine Foods

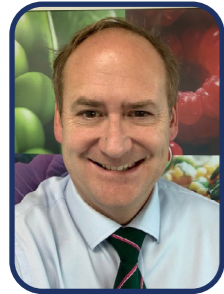


Photo: MSC Jumbo Cod Fish Fingers
Company: Paramount 21

Greenyard recognises that long-term sustainability goals are only feasible if they are supported by short-term incremental targets. Progress towards our targets is regularly updated and publicly displayed with supporting information to communicate to employees, suppliers and customers. Transparency is key to the progression of the strategy. We actively support our customers' requirements by sharing sustainability data to assist in their own reporting.

By continuing to collaborate with suppliers and customers, and sharing knowledge across different sectors, our aim is to ultimately enable the alignment of sustainability agendas. This opens opportunities in sharing industry knowledge and innovative ideas, enabling Greenyard to help in the full-scale transition to a decarbonised supply chain. We take pride in the fact that our sustainability efforts have gained positive recognition. We endeavour to continue meeting and exceeding standards which we benchmark our work against and by continually updating our Environmental Management Strategy, Greenyard expect to continue discovering ways to grow our company and simultaneously reduce our environmental impact.

4.5 Meet the members: Crop's Group



Paul Weatherby

Managing Director, Crop's Foods Ltd

We are working to build sustainability into everything we do – not as an afterthought or tick box but as part of our fundamental processes. We work every day directly with land and soil. We grow food and work with the weather we are given, so in a sense we are stewards of the land, and we are at ground zero of climate change. We have responsibilities to our customers, to the final consumers of our food and to the environment.

Our customers are making their own pledges. Some are using third party data reporting platforms, which can be comprehensive, exhaustive even. Often there are not yet defined plans of how customer pledges can be achieved; very often the information required from each customer differs. Continuous improvement is a given and there can be financial penalties for failing to deliver against targets. We would love to see the development of an industry wide set of standards and protocols.

As a group, we have a dedicated team working to drive sustainability within all our working practices. We have policies on ethical trade, GM and environmental and responsible sourcing. We have ambitious targets: to reduce our carbon footprint in line with EU Green Deal requirements – 55% by 2030 and to be carbon neutral by 2050.

Photo: British Hake Supremes
Company: Brakes



Category sponsored by



Photo: Vegan Lemon & Poppyseed Muffin
Company: Dawn Foods

For many years – and long before it was a requirement of either regulators or customers – we have been investing in projects that are environmentally friendly. Producing frozen vegetables and fruit, we inevitably consume a lot of water and power. One of the impacts of the changing climate is drought and so water preservation and energy conservation are twin priorities for us.

At our largest site in Europe, we have developed a closed water circuit. Here not only is our waste harvested and utilised to produce 40% of all energy used on site, but all the water is treated, pumped back into manmade reservoirs and eventually recycled back into use about seven years later. The benefits are environmental (these reservoirs are now nature reserves providing habitats for thousands of species), but they are also sustainable and economical – the combination of which is important for continual investment.

"In Portugal, we have recently installed over 2,200 solar panels that will generate 17% of all energy used on site. At our pineapple plantations in Costa Rica, rainwater is captured and recycled by a creek to help clean the fruit. Here, we have also chosen to leave part of our plantations virgin jungle – our principle being 'see it as it is, leave it as it was.' Such a commitment can help with the marketing of a product – consumers increasingly want to hear the stories behind the products – and in recruiting and retaining great staff who want to be part of a business that is doing its bit for the planet."

Paul Weatherby

Managing Director, Crop's Foods Ltd

By flying drones over farms, we have managed to reduce pesticide usage to such a level that in one farming area we are 98% residue free. Reducing environmental impact while improving yields – this aligns both our environmental and commercial ambitions – creating a truly virtuous circle.

We are always exploring the best way in which to understand the commitments of farmers and customers and then capture the data that would demonstrate the benefits to the environment.

The Crop's Group is in the process of

establishing targets and strategies for all the manufacturing sites within the group. Some areas of the social and product aspects of sustainability such as signing up to ETI platforms (SEDEX), Valid IT to ensure non-GM, have become standard over the years and are now incorporated into standard approval processes. To a new generation of consumers, the climate and the preservation of our earth's resources and habitats are priorities. For growers and producers, the focus on sustainability is only going to intensify. At Crop's we want to lead on sustainability, not follow.

Areas to focus on without compromising the safety or quality of the final product:

Conversion to Biofuels
Pesticide Application
Carbon Emissions
Food Waste
Water Recycling
Recyclable Energy
Plastic Reduction
Packaging Recyclability

4.6 Meet the members: Young's Seafood



Cameron Moffat
Sustainability Manager, Young's Seafood

As a nation, we are becoming increasingly conscious about the origins of our food and how ethically brands are operating. It is therefore

important that foodservice operators are given the right information, so they can make more informed choices when sourcing seafood.

Our customers want to be able to reassure their customers that they are serving great

quality fish, so we provide information about the benefits of serving our products and give details on how we make sure our fish is responsibly sourced. Operators can be confident that all Young's products have the sustainable seal of approval from our very own award-winning Fish for Life programme, with much of the range also featuring MSC certification. Like many things, sustainable seafood has now become an expectation on menus and products that lack any form of certification or ethical marks will be dismissed by today's environmentally conscious consumers. The provenance and sustainability of the fish and seafood you serve can be a huge selling point and will resonate positively with a wide customer base. Sustainable seafood is the best solution for our planet and delivers on taste



Photo: Jumbo Fish Fingers
Company: Young's Foodservice



Photo: Gluten Free Breaded Argentinean King Prawn
Company: Brakes

and quality too.

As the UK's biggest producer and distributor of frozen, fresh, and chilled seafood, responsible sourcing and protecting the oceans will always be at the heart of everything we do.

"For example, we are proud to be playing a proactive role in tackling the use of plastic and by 2025 we aim to have 95% of our packaging recyclable. We also recognise the important role our operations need to play in tackling climate change with targets to cut emissions in line with science-based targets, reduce water usage by 15% and cut waste by 20%."

Cameron Moffat
Young's Seafood

Protecting our oceans is important to all seafood suppliers and many, such as Young's Seafood, are now involved in solving wider issues like the sustainable sourcing of non-seafood ingredients and the use of plastic. Since the release of Blue Planet 2, plastic waste has become an important issue for everyone as we were shown first-hand the devastating effects on our environment. That's why it's the goal of seafood producers to do everything we can to create a secure and sustainable future for everyone. Seafood

suppliers continue to work hard to find innovative ways to reduce environmental impact at every stage and try to give something back for everything that is taken out.

From our packaging choices and commitment to the Plastic Pact through to our regular beach cleans, we're proud to be making a difference, no matter how big or small. We're also proud to send zero waste to landfills. We are proud to lead the way with our goals and achieve a brighter future.



Gareth Roberts
Head of Category Management (Frozen), Young's Seafood

We have close partnerships with all our suppliers, so we know exactly where our fish comes from, how it's caught and who's caught it.

This ensures all our products meet our high standards every step of the way, so that our customers deliver only the best on menus. One species that provides a great example of this is Wild Alaska Pollock. The Marine Stewardship Council has certified Alaska's Pollock fishery as one of the most abundant. The fisheries there manage their Pollock stocks by avoiding overfishing to ensure the population is replenished.

Managing fish populations, preserving marine



Photo: Gluten-Free MSC Coated Whitebait
Company: Paramount 21

biodiversity and protecting habitats is no easy task. It requires cooperation at all levels of Government, from local management to multilateral agreements across the globe. We're dedicated to working with suppliers, governments, fisheries organisations, NGOs

and local communities to do this in order to ensure a sustainable future for our industry and the environment.

Young's remain highly engaged in the sustainable seafood movement and we are striving to reduce our business impact on

Some of the key projects that we are engaged in include:

■ **Funding member of Fisheries Innovation Scotland**

Funding member of Fisheries Innovation Scotland⁽¹⁾ which funds a broad range of projects including Smart-trawl, benthic traps, decarbonisation, benthic mapping tool, etc. This funding gives a seat of the FIS board to drive its strategic plan.

■ **Funding project**

Funding project alongside SafetyNet, M&S, Associated Seafood regarding the use of lights to reduce bycatch on mix demersal fishing vessels in the North Sea.

■ **Funder of multiple FIPs**

Funder of multiple FIPs which are working to improve the impact of these fisheries against the principles of the MSC standard.

■ **Providing support for moratorium on trawling**

Young's as previously funded a moratorium of trawling in pristine arctic waters alongside Greenpeace⁽²⁾.

■ **Providing funding for PhD**

Funding PhD into the impacts of static fishing gear at Herriot Watt University.

■ **Founded the Sustainable Seafood Coalition (SSC)**

In 2011, Young's – along with several NGOs, retailers and processors – founded the Sustainable Seafood Coalition (SSC). Along with other engaged parties, we helped develop the SSC Codes of Conduct on Environmentally Responsible Fish and Seafood Sourcing and Environmental Claims, which we follow, committing to support the vision of promoting responsible and sustainable fish and seafood consumption.



marine biodiversity and habitat loss.

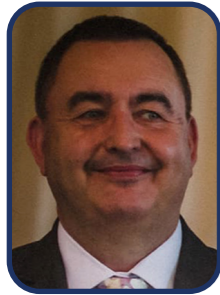
All of our policies are determined by our own Fish for Life policy, which comprises five pillars: making fish for all, being community-driven, sourcing our seafood responsibly, looking after our environment and being honest about what we do and why.

In 2018, we committed to make significant cuts in our use of paper packaging, reduce

our plastic packaging by 10% and remove all black packaging by the end of 2020: We have successfully removed 170 metric tons of paper packaging and 200 metric tons of plastic packaging, and are now working towards our next milestone: to ensure that 100% of our packaging is reusable, recyclable or compostable by 2025.

⁽¹⁾ <https://fiscot.org/fis-projects/> ⁽²⁾ <https://www.greenpeace.org/international/story/7377/this-is-big-mcdonalds-tesco-youngs-seafood-commit-to-safeguard-the-arctic/>

4.7 Meet the members: Excelerate Ltd



Andrew Chinnery

Managing Director, Excelerate Ltd

From April 2022, the Government is introducing a £200/tonne tax on plastic packaging that does not contain 30% recycled material. We have been told that there is a very straightforward process to reduce your obligation - by using 30% recycled material in any plastic used, including pallet wrap.

This is due to ongoing pressure from the Government to create a circular economy, although ultimately, plastic is not the issue. Currently the infrastructure is not in place to efficiently recycle and reuse flexible plastics.

Plastic is proven to reduce waste, CO2 and fossil fuel use. In fact, replacing it generates five to 15 times more CO2.

Plastics account for less than 0.5% of all waste and are proven to reduce overall food waste creation. Replacing plastics means creating three to four times more food waste

Degradation Rates: a comparison of synthetic and natural materials⁽³⁾

Material	Degrades in soil?	Degrades in landfill?	Degradation releases CO ₂ & methane?	Green according to LCA?
PE or PP Film	✓ 1-3 years	✗ >100 years	✓	✓
Paper	✓ 1-3 years	✗ >100 years	✓	✗ Worse than PE and PP
PLA or PHB Bioplastic Film	✓ 1-3 years	✗ >100 years	✓	✗ Worse than PE and PP
Leaves*, carrots, steak	✓ 1-3 years	✗ >100 years	✓	Not applicable

for every pound of plastic replaced. Despite the public perception, plastic is one of the greenest products to produce (as proven by life cycle analysis) – it's just not disposed of correctly. Plastic is proven to reduce waste, CO2 and fossil fuel use. In fact, replacing it generates five to 15 times more CO2.

Unfortunately, the use of recycled material is not as simple as it first appears. Firstly, the availability of recycled material cannot be guaranteed, which can cause disruption in the supply chain. Secondly, due to the variable quality of recycled material, this can impact on the consistency and quality of the final film.

The recycled content in these films can also come from any source, which could create issues when wrapping food or drink products, potentially exposing products to all kinds of contaminated plastic waste. This situation may change over the next few years, but

with the lack of infrastructure currently in place, these types of products are not a sustainable option.

There are some interesting options that companies may consider, such as a starch-based sustainable material that is a by-product of sugar cane production. On paper, this is potentially a great solution, but for the UK, it does not contain recycled content, therefore companies will still be liable for the plastic tax. This is a product produced in Brazil, where the rainforests are cut down to farm a resin, taken from the production of sugar cane. This raw material must then be shipped halfway across the world to be converted into a film. We can all probably agree that this is not the way forward, as innovative as it may be.

We offer a simple solution through a pallet wrap made using nanotechnology. These materials are completely recyclable and



Company: Excelerate Ltd

⁽³⁾ <https://plasticparadox.com/do-plastics-last-forever/>

will secure goods on pallets in a more cost-efficient way. They can be used with existing wrapping machines, without any major adjustment and, most importantly, can save you up to 50% on an annual stretch film bill and can result in up to 80% less film being used. The savings that can be made will massively offset any taxation you may need to pay to HMRC.

In summary, plastic saves waste and so results in lower greenhouse gas emissions. Using the right quality of plastic can reduce the quantity required. In the UK, we are lacking any large infrastructure for businesses to recycle their plastic. Until this is addressed, there will not be a guaranteed supply of raw materials to produce post-consumer recycled products.

Photo: Frozen-at-Sea Canadian scallops
Company: Clearwater Seafoods



"An interesting fact is that a huge amount of plastic film is never used, due to roll damages. This can be solved by choosing a film with reinforced edging, giving superb performance, even after rolls are dropped, thrown or damaged."

Andrew Chinnery
Excelerate Ltd

4.8 Meet the members: COOK



Richard Pike
Technical and Sustainability
Director, COOK

It's a given that any business not taking sustainability seriously is on the road to obsolescence. The climate crisis is real and imperative, modern slavery is on the rise and consumers increasingly want to see change. The good news is that it's becoming easier to start or accelerate the journey with more and more help, advice and support coming to the fore and most importantly a new era of collaboration surfacing. This is a vital part of any business's effort to drive change and become more sustainable. The old African proverb, "If you want to go fast, go alone - if you want to go far, go together" rings truer every day.

At COOK we talk about nourishing "planet, communities and people." These are the three pillars of our purpose framework, and our roadmap is in the form of three to five-year (or longer) goals that translate into annual milestones that we report on, on a quarterly basis.

Our goals are co-created with our teams and senior heads through a series of collaborative



Photo: Wild Mushroom and Aubergine Lasagne
Company: COOK

sessions throughout the year. We also survey our customers and colleagues for their views on which projects they are most passionate about and where they would like to see us putting the most ambition. Once drafted they are refined and honed as we move through the process so that we end up with a set of targets that are clear and unified and that challenge us through the year and, ultimately, into 2030 and beyond.

We are fighting on many fronts to establish our goals. First, we need to understand what sustainability means to us. For some it will be about a straightforward focus on carbon and scope one and two emissions, for others it might be more about community impact, but it is always multi-faceted and never easy!

Progress against our 2020 goals

NOURISHING RELATIONSHIPS WITH OUR PEOPLE & THEIR WORK

- Continue to offer jobs to people needing help into work following prison, homelessness or other challenges through our RAW Talent Programme**
Done. We've now welcomed more than 100 RAW Talents to COOK. In the 2020 Best Companies survey, we ranked #1 for helping people from disadvantaged backgrounds (see p14).
- Provide 100 more opportunities through our Dream Academy**
Not done. Since April 2018 we've had 75 people (including customers and suppliers) take advantage of our Dream Academy life coaching initiative. We've realised that we need to be constantly banging the drum for this incredible learning opportunity, not assuming people will sign-up without prompting (see p16).
- Keep the difference between the highest and lowest paid people at COOK within 15x and support the financial well-being of all our staff, by paying the Living Wage and sharing 5% of profits annually**
Done. In fact, our profit share has increased to 6% (see p22-23).

NOURISHING RELATIONSHIPS WITH CUSTOMERS & COMMUNITIES

- Support 1,500 people who need a helping hand in the kitchen with a Care card.**
Done. Since April 2018, we estimate 1,583 people have used a Care card giving them 30% off our food because they're going through a particularly difficult time, such as chronic or terminal illness. Care cards have been used in more than 19,000 transactions and the total discount given amounts to £187,424.
- Support 1,500 community events to bring people together with our 30% discount.**
Done-ish. We were on track before the Covid-19 pandemic halted all community events, supporting 1030 events in the two years to April 2020.
- Provide a further 1 million free meals to school children in Malawi through our partnership with One Feeds Two.**
Done. 1,542,864 meals donated since April 2018 and more than 2.5 million in total (see p40).

NOURISHING RELATIONSHIPS WITH FOOD & WHERE IT COMES FROM

- Source 100% of our chicken from UK higher welfare farms**
Done. All our chicken is raised in the UK to higher welfare standards and this year we also received a Good Turkey Award for welfare (see p48).
- Halve food waste from our central kitchen and warehouse**
Not done. The disruption caused by the pandemic at our kitchen sent us way off-target in 2020-21 with our end-of-line waste the equivalent of 1.75% of the total ingredients we use, compared to our goal of 1% having previously been on track. We're now refocusing our efforts.
- Introduce a more sustainable alternative to our plastic food trays**
Done. 98% of our trays can be widely recycled and we have also introduced reusable bags fully across the business.
- Double the number of healthier, Okay Every Day recipes in our core range to 20 (a third of the range)**
Done. We averaged 20.4 recipes in our core range over the three years and have just launched a new range of healthy dinners, Wholebowls (see p50).
- Grow meat-free sales to 10% of our savoury sales total**
Done. Meat-free sales accounted for 17.3% in 2020-21.

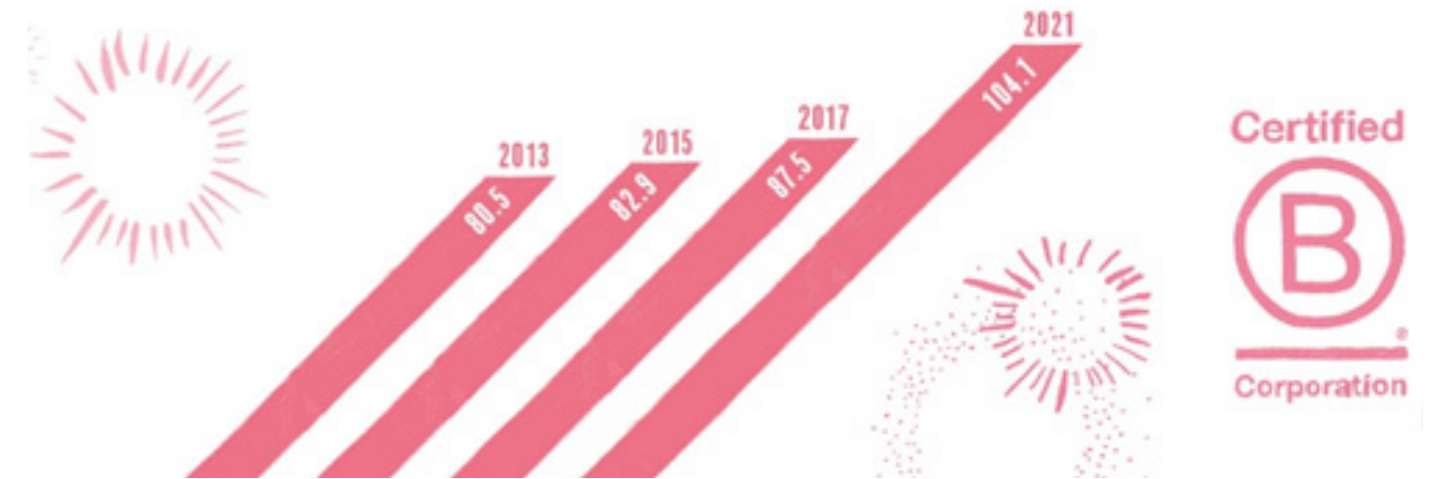
NOURISHING RELATIONSHIPS BETWEEN BUSINESS & SOCIETY

- Engage more people in a better way of doing business through our digital platforms, print and store communications e.g. through our Annual General Munching.**
Done. In hindsight, a rather woolly to-do. This year the proportion of customers aware of our B Corp status increased to a high of 17%, according to our annual survey. We kept up a steady flow of content focused on business as a force for good in all our customers' communications.
- Invest 3,000 hours collectively in supporting or inspiring other organisations through volunteering our time and expertise.**
Done. We invested 3,235 hours collectively through 1,935 hours of volunteering and sharing our expertise and 1,300 hours dedicated to the Kindness Fund in the past year (see p26).
- Recertify as a B Corporation in 2020 with an improved score.**
Done. With bells on. Our score of 104.1 was 19% higher than our previous assessment (see p58).
- Maintain 100% renewable electricity at our shops and in our Kitchens.**
Done. We are now carbon neutral in our direct operations thanks to offsetting and in 2020-21 achieved our lowest ever carbon intensity (see p64).

certification is not a reason for what we do but a useful measurement of how we are performing and where we may need or want to target improvement. It's easy to get into the habit of chasing points but when done through the lens of what makes the business better it becomes a very useful tool.

It can be quite nerve racking to stick your head above the parapet and wait to be shot at but 99% of those who have an interest appreciate the honesty and being involved with the challenge. So, if we fail to meet a target, being truly transparent about the reasons for it is always beneficial. Likewise, when we do hit a target, or even better do so earlier than planned, it's important to shout about it to aid engagement and provide encouragement to others to do the same.

Setting up appropriate governance systems that allow you to collect data and analyse it to create useful management information is another critical part of the process to ensure that you are on track and to ensure that you can validate progress subjectively. The sustainability landscape changes daily, with new technologies, differing stakeholder expectations and updated policies. What was okay and possibly ambitious three or four years ago when a target was set may suddenly actually be behind the curve, meaning that you are lagging behind your competitors. Whatever happens though, it's never dull and the planet will reward us for our determination!



How our scores have evolved through each certification round

4.9 Meet the members: Birds Eye



Steve Challouma

General Manager, Birds Eye

Sustainability is very much front of mind for UK consumers and a key priority for us as a company. Everyone needs to play their

part and at Birds Eye we take our role in the positive and future-proofing changes very seriously. As part of Nomad Foods, we have signed up to the Race to Zero initiative and we have successfully moved to 100% renewable electricity across all our UK factories. We're continuing to empower consumers to make more environmentally-friendly food choices with our growing

plant-based range Green Cuisine, as well as entering meaningful and action-led partnerships, such as with the World Wildlife Fund this year, in support of sustainable sourcing and biodiversity.

Most shoppers (62%) are now influenced in their food and drink purchases by sustainability issues and frozen food is perfectly positioned to help - offering excellent value as a healthy, sustainable, and convenient meal option which also helps to reduce food waste.

We are committed to responsibly sourcing ingredients across our portfolio. By working closely with the Marine Stewardship Council for over 20 years, we have achieved a 100% MSC certified fish portfolio and work continues to ensure it remains at this level. We are proud to be open with our shoppers about how and where we responsibly source



Photo: Pecan & Irish Cream Blondie
Company: Destiny Foods



our fish. Our new packaging design, launched across our fish portfolio earlier this year, highlights our commitment to transparency. Using QR codes found on the new packs, shoppers can trace the origin of the fish as part of our Fish Tracker tool.

However, we are also looking beyond fish, we're currently working towards ensuring that the ingredients used in our vegetable and potato ranges are grown in accordance with sustainable farming practices. This will build upon our achievement in 2020 when our UK pea grower cooperative became the first UK farm management group, and the first globally in frozen food, to be awarded the Sustainable Agriculture Initiative Platform's

Farm Sustainability Assessment Gold level.

Reducing food waste is an area that we're extremely passionate about, as it's already a fundamental benefit of frozen food. We've also set ourselves the target to cut food loss and waste in half by 2030 across our whole supply chain. While this is an ambitious target, we're making great progress in this area already - as an example, we recently won The Marketing Society Sustainability Award 2021 for our Food Waste Campaign. Our winning activation saw one savvy shopper replace Captain Birds Eye on pack for a limited run, with the Iceland-exclusive packs featuring the guest Captain's top tips for reducing food waste.

4.10 Meet the members: Cargill



Hugo Jansen

Business Development & Sustainability Director, Cargill Protein Asia - Europe

In food supply chains, sustainability demands are often particularly broad and complex. Consumers and stakeholders of animal protein have concerns that relate to animal welfare, antibiotics and medication use, greenhouse gas emissions, land use and deforestation, responsible

water use, packaging, food waste, human rights, eutrophication and many more. Adding to the challenge, different consumers and stakeholders have different views about the priorities for addressing these demands. Consumers also request that food products remain affordable so that they can enjoy them regularly.

Delivering on all these criteria is challenging. But it's necessary to meet the expectations of our customers and their consumers. We must take a balanced approach that enables a focus on the highest impact issues as well as the unintended consequences that can often come with specific supply chain interventions. For example, changing

Photo: Hot & Spicy Chicken Wings
Company: Sun Valley



Consumers and stakeholders of animal protein have concerns that relate to:

Eutrophication Land Use and Deforestation
Greenhouse Gas Emissions **Animal Welfare** Packaging
Antibiotics and Medication Use **Responsible Water Use**
Food Waste Human Rights

to slower growth chicken breeds and lower stocking density may improve animal welfare, but result in higher use of animal feed, water and agricultural land, driving up greenhouse gas emissions. There will always be trade-offs in the quest to balance consumer desires with true environmental impact.

These trade-offs have to be made with tailored solutions that fit to local situations. Responsible choices have to not only be explained to customers and suppliers with a continuous improvement mindset, but worked out together using a collaborative approach. Communication, transparency and progressive, focused ways of working are important in creating a sustainable roadmap. Agility and challenging the status-quo are

required to make the small steps, scaling them up through sector and cross regions to make a difference on climate change.

Transparency ensures all aspects of the supply chain are understood, from quality specification to human rights and animal welfare. The link between responsible food and its environmental impact is key. This must then flow through all parts of the supply chain to our customers and finally the end user. For end-consumers, the wellbeing of animals and workers have never been more important. Ultimately, the end-consumer is in the driver's seat, from consumption preferences, through taste to sustainable and responsible approaches.

Photo: Southern Fried Chicken Strips
Company: Sun Valley



"Chicken is a valuable and versatile protein that has a modest environmental impact and represents a high quality, affordable and sustainable protein source. The sustainable innovations in the industry gravitate around animal welfare, waste management, regenerative agriculture, circular packaging and alternative proteins. "

Hugo Jansen

Business Development & Sustainability
Director, Cargill Protein Asia - Europe

Innovation and collaboration are key – for example, see our development of digital automated welfare monitoring systems that use chicken vocalization analysis and computer vision for the early detection of emerging health and welfare challenges in broiler flocks. Innovation deployments need to be analysed and understood at each level of the supply chain, and within the local dimension.

One company alone will not be able to change an entire industry and supply chain. Cross-sector collaboration is needed to address the challenges and initiate change.

Cargill embraces this holistic vision and is eager to drive the changes and lead by example. Engaging dialogue with sector partners, as well as start-ups and NGOs is particularly fruitful in defining new avenues to a more sustainable future. This is why Cargill is collaborating with WWF to share knowledge, learn from trials and best practices, for example by carrying on animal welfare excellence or reducing CO2

emissions. Data is also playing a crucial role in monitoring the improvements and the metrics along the sustainability roadmap. Cargill is also partnering with SBTi (Science Based Targets initiative) to set, approve and monitor its goals towards Scope 1 & 2 and Scope 3, consolidating its sustainability roadmap.



Photo: Chinese Style Crispy Shredded Chicken
Company: FBI Food Group



"Awareness of the benefits of using natural refrigerants within UK food industry in terms of sustainability is very prevalent today. At Starfrost, we have identified a significant increase in demand for long term low carbon cooling solutions, with our customers choosing spiral freezers and IQF systems that operate with natural refrigerants, such as CO2 and ammonia. We have also seen expansion and development in production of frozen high value ready meals, meal ingredients and meat free products."

Lauren Stephenson

Marketing Manager, Starfrost

Photo: Chippy Curry Battered Chicken Strips
Company: Heron Foods



"BFFF members will be aware of the critical role that refrigeration plays in ensuring food safety and security throughout the cold chain. Operating efficiency is key

to lowering energy consumption and meeting future commitments in the transition to net zero. Star Refrigeration focuses on using natural refrigerants (ammonia and carbon dioxide) and the latest refrigeration technology to deliver solutions that set new benchmarks in efficiency for cooling and opportunities for waste heat recovery to support the decarbonising of heating. Our use of remote data analysis and proactive approach to preventative maintenance ensures optimised, reliable performance over the refrigeration systems life."

Dr Rob Lamb

Group Marketing and Sales Director, Star Refrigeration

5. Consumer Behaviour

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5.1 Consumer Behaviour Chapter Champion

Shane Meharg

Group Communications & PR Manager, Magnavale

Another year has gone by, and we have yet again experienced significant changes in consumer behaviour. There are still glimpses of extreme buying behaviour such as the panic buying experienced for certain products throughout the past two years. However, for the most part, the removal of lockdown restrictions has increased the frequency of shopping occasions and therefore slightly lessened the pressure on supermarkets, at least on the demand side of the supply chain.

Unfortunately, while somewhat lessened, consumers still shop less frequently but buy significantly more, particularly at weekends. This buying behaviour seems to be sticking around into the post-Covid era, posing further complications to the challenges that are already impacting supply chains.

Demand for frozen food has increased significantly; larger volume shopping occasions mean that frozen is replacing fresh as it keeps much longer. Covid has led to a clear shift towards healthier choices. More people are now more health-conscious and willing to change their lifestyle due to the fear of Covid and future illnesses.

Plant-based products are amongst the largest growth categories, as these tend to freeze very well, and are in greater demand from a customer base that is increasing their consumption of meat alternatives. Shoppers have retained several habits from lockdown; one habit in particular is the size of their

shops and the period of time in-between visits. Consumers have been buying more and thus visiting the supermarket less often.

One potentially beneficial way that manufacturers and retailers can respond to this is by adjusting size of packaging. Bulk packs and larger volume items give manufacturers and retailers the opportunity to make a substantial saving on packaging costs while catering to the new demand for bulk buying.

Over the past two years, perceptions have changed significantly in favour of frozen food. The vast majority of food waste comes from private households, which makes it more

difficult to address but it's not impossible; it is self-evident that switching to frozen from chilled will have a positive impact.

Indeed, many studies have concluded that greater reliance on frozen food would deliver a significant reduction in the nation's environmental footprint, despite the energy required to keep products frozen. "Frozen food does not cause more damaging emissions than their [chilled] counterparts," concluded one German study⁽¹⁾.

It continued: "In addition to a comparable climate footprint, frozen food has even more to offer. As a matter of principle, the products are fresh, since vitamins are

preserved during the process of shock freezing. Moreover, frozen food is easy to handle and allows portioning in the sizes needed, and thus may help to counteract food wastage."

"Frozen food can significantly reduce greenhouse gas emissions for products not produced in the UK year-round."

It stands to reason, very few meals require a whole broccoli, for example; by simply changing to frozen, the remainder can be kept for months, rather than days, before



Photo: Asda



Photo: Iceland Foods

(1) Carbon Footprint Frozen Food Deutsches Tiefkühlinstitut, September 2012

spoiling. Studies have confirmed this. One⁽²⁾ concluded: "Frozen food can significantly reduce greenhouse gas emissions for products not produced in the UK year-round."

What's more, as use of energy from renewable sources increases, frozen food will see a far greater reduction in carbon emissions relative to that of chilled products, simply because they are stored for longer, and at lower temperatures. Another study found that greenhouse emissions from a typical roast chicken meal comprising frozen ingredients are 3% lower than a comparable meal made with chilled ingredients⁽³⁾.

That difference, of course, is not huge. Crucially, emissions arising from waste from the frozen chicken dinner accounted for 31% of the meal's total emissions, while waste from the chilled meal accounted for 53.3% of its total; emissions from energy made up 67% of the frozen total and 45.6% of the chilled.

Clearly, greater use of renewable energy in the frozen supply chain will widen the emissions gap between frozen and chilled food, in favour of frozen. The development of facilities such as Magnavale's new cold storage facility in Lincolnshire, which is powered completely by energy from renewable sources, are fuelling the environmental arguments for greater consumption of frozen food.

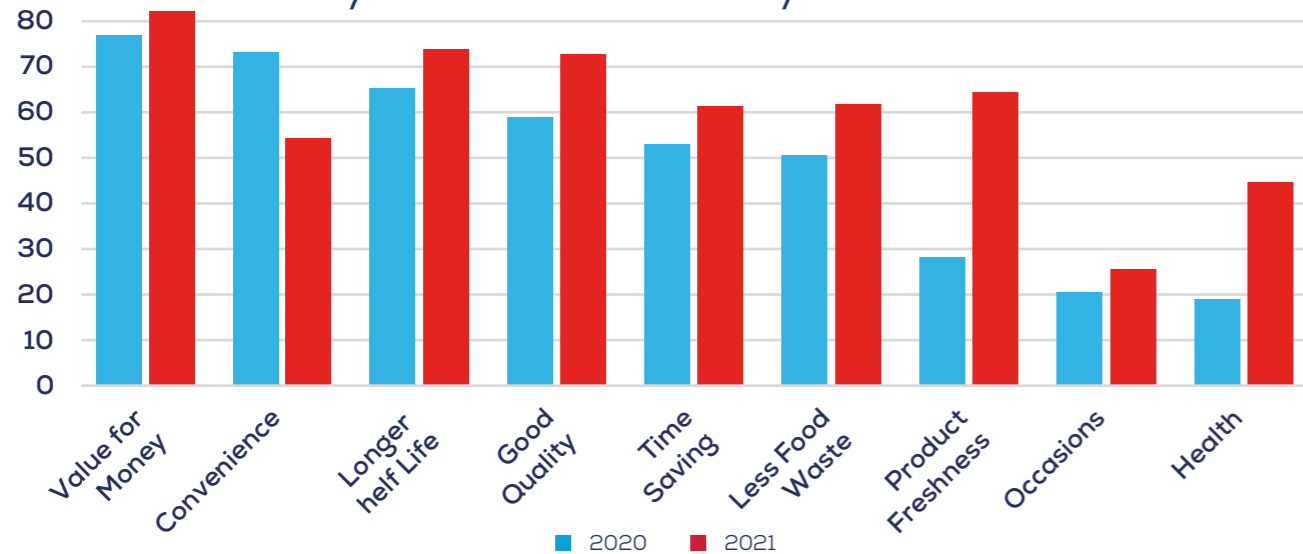


Photo: Aldi



To convince more people to switch to frozen, the industry must challenge the misconception that frozen food isn't as fresh or lacks the flavour or nutrient load of chilled foods. Progress is being made as supermarkets and consumers alike increase their freezer space. There are several ways to adapt to the modern requirements of the food supply chain and doing so is crucial. It's hard to predict what the future holds, but we can be sure that it won't be a return to the status quo of the pre-covid era.

How much do these points influence your decision to buy frozen⁽⁴⁾



5.2 Tomorrow's shoppers

As we've seen, frozen food has emerged from the fog of the past two years in pretty good shape. Its longer shelf life has suited the larger, less frequent shopping trips of lockdown, while its growing reputation for freshness and health and environmental benefits has chimed well with a new breed of conscientious shoppers.

This, combined with an undaunted flow of NPD and sustained marketing investment, has contributed to huge growth over the past two years. What's more, despite high shopper

penetration, there are opportunities for further growth. After all, the average British household's freezer is opened just six times a week, while the fridge is opened 45 times⁽⁵⁾.

Crucial questions remain about how frozen food can maintain its momentum as the nation goes back to the "new normal," whatever that may be. As the pace of change continues to accelerate, working out what the priorities of tomorrow's shoppers will be is not as straight forward as it might seem. So, what are the answers?

Flexible working has become more prevalent within society, as businesses adapt to the

post-Covid world. As a result, we are seeing more in-home lunchtime occasions – of all occasions in-home since lockdown, lunch has seen the greatest increase at 55%⁽⁶⁾. Reports of the death of the office early in the pandemic were exaggerated, but no one's betting on a return to pre-pandemic work patterns any time soon.

Home working is here to stay. This means demand for quick and tasty meal solutions inside the home will remain strong. Suppliers like frozen fruit, veg and herbs specialist Ardo are therefore poised for continuing



strong sales. "Households have lived and breathed the great attributes of frozen foods in their daily lives more than ever before since the start of the pandemic," says **William Burton, Sales and Marketing Director at Ardo.**

"These benefits are extensive. Quality and freshness in frozen can be better than fresh. Frozen veg, fruit and herbs are picked at optimal ripeness with goodness and nutrients sealed in from the moment of harvest. Never



Company: Ardo

has the world of frozen been so diverse. Whether you want to scratch cook or you just want a quick meal using prepared vegetables or fruit mixes, frozen gives excitement, involvement or convenience in every mouthful."

Now that the temptation to turn to more indulgent food for comfort throughout the uncertainty and fear of lockdown is waning, there is growing demand for healthier meals. Fifty nine per cent of consumers have switched to healthier diets post-Covid; 41% want to lose weight, 40% want to increase



fruit & veg consumption, 39% want to cut sugar and 14% want to boost their immune system through their diets⁽⁷⁾.



"Interestingly, consumers are choosing healthier meals, compared to pre-lockdown midweek lunches, with convenience still a key driver⁽⁸⁾," says **Olivia Moore, Senior Range & Strategy Planning Manager at Birds Eye**. "We expect this trend

to remain for the long-term and so it is important that frozen can play a key role by providing healthy and convenient lunchtime solutions."

Seventy two per cent of meals are now eaten inside the home (versus 60% pre-pandemic), presenting a key opportunity for the category.

With the pace of life picking up once again, frozen food suppliers are ideally placed to meet these demands with healthy and convenient lunchtime solutions. Seventy two per cent of meals are now eaten inside the home (versus 60% pre-pandemic), presenting a key opportunity for the category. Think fish finger sandwiches for a working lunch or frozen croissants and coffee during the Zoom board meeting. Brunch occasions are up 36%⁽⁹⁾.

"Shoppers now see convenience as more than just fast," adds Moore at Birds Eye. "The reduced preparation time of ready-to-use products and 'portionability' are just as important as speed⁽¹⁰⁾. Frozen consistently offers shoppers these benefits, and the pandemic has helped shoppers rediscover the convenience of frozen."

More than half of young people now shop in the free-from aisle, with 25 to 34-year-olds the most frequent adopters and 64% of consumers in that age range shopping the category⁽¹²⁾.



Another trend that's seen a sharp rise since the start of the pandemic is gluten free. "The overall gluten-free market has risen from £470m at the beginning of 2019 to £650m at the end of 2020⁽¹¹⁾" says **Emma Curtis, UK Managing Director at Strong Roots**.

UK Managing Director at Strong Roots.

"More than half of young people now shop in the free-from aisle, with 25 to 34-year-olds the most frequent adopters and 64% of consumers in that age range shopping the category⁽¹²⁾."

This trend has shifted across to the frozen



meat-free category, most prominently in burgers. The size of the gluten-free burger category has doubled in the past year⁽¹³⁾, increasing share of category to 12%. "If current trends continue, gluten-free burgers will make up 38% of the category within five years," says Emma. "Strong Roots are early adopters, reformulating their Pumpkin & Spinach Burger to be Gluten Free without compromising on taste."

Snacking and quick eating is at an all-time high within both total market and frozen meat

free. Research shows that Brits are snacking more often than they once did, accounting for an additional 333 calories per day⁽¹⁴⁾. Total Snacking is one of the fastest growing areas, with sales up 4.8%⁽¹⁵⁾. In the frozen meat-free sector, snacking is growing at 87%⁽¹⁵⁾ with plant based driving a higher proportion of growth.



5.3 Growing freezer capacity signals good things to come



Olivia Moore
Senior Range & Strategy Planning
Manager, Birds Eye

Stockpiling in response to Covid-19 produced an 'unseasonable' rise in the sales of freezers and chest freezers, as reported by key freezer retailers. Freezer sales grew by 68% versus the previous year and shoppers now have more home freezer capacity, which is likely to drive continued category growth.

Photo: Breaded Cod
Company: Birds Eye



As a result, there is great potential for continued growth of the frozen food category in coming years, particularly through engaging younger shoppers, as frozen offers them great value, versatile food and convenient meal solutions, whilst also being healthy and better for the environment.

Frozen saw phenomenal growth through lockdown as more shoppers bought into its benefits and shopping habits changed. We can see from the continued engagement with frozen post-Covid, that it is a category set up for long-term growth. With the frozen category having a multi-channel presence and relevance at key in-home mealtime, it is well set up for continued success.

5.4 How frozen food suppliers should target aspiring home chefs



Jonathan Ralling
Commercial Director, Place UK

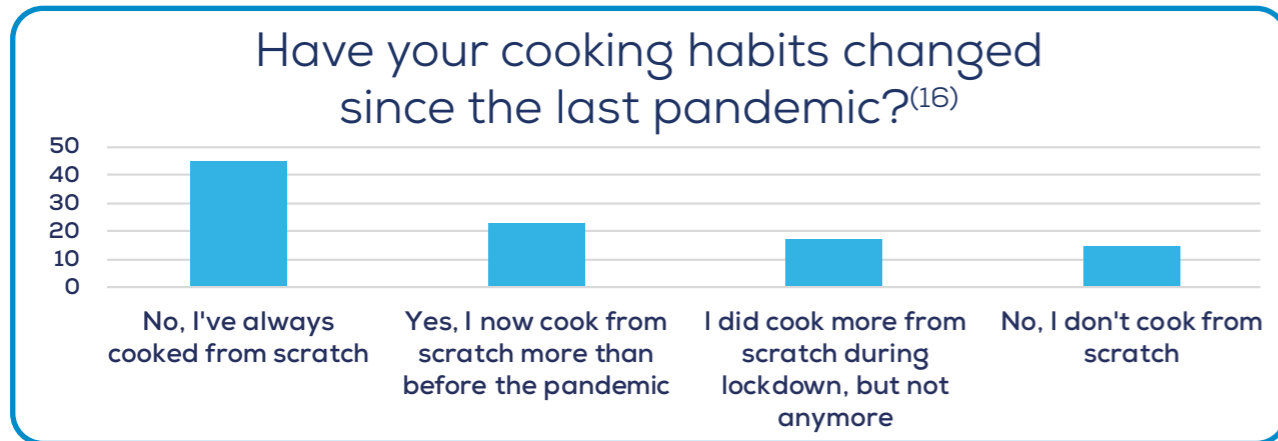
Frozen food suppliers and retailers have worked hard to add value to the ready meals category, but less so when it comes to prepared products that helps budding home chefs to experiment and develop meal solutions at home.

The development of high quality, high convenience ingredients is an area that has been exploited to a degree in fresh but creating the same level of on-fixture interest is clearly an opportunity for frozen. Research shows that usage is the key driver of both

growth and market penetration, yet many products in retail are marketed almost as a commodity.

If people are to consume our goods we must help them to get conscious value from consuming them. The positive news is that the explosion in scratch cooking is likely to continue but will likely head slightly back towards convenient product solutions that can be managed in the home.

Therefore, the opportunity is clear: capitalise on the current trend of scratch cooking; capitalise on the convenience of the frozen store cupboard; and create products that add value to both the finished dish, and the cooking experience.



5.5 Welcome to the 'era of conscious control'



Charles Banks
Co-Founder, The Food People

Moving into 2022 and beyond, frozen food couldn't be more on point than it is right now, considering the forces shaping behaviour – from the rising sustainability agenda, the importance of value in an era of price inflation to supply chain availability inconsistencies and the continued growth in the spending power of younger Millennials and Generation Z.

This will be a year of continued climate related 'wake up calls.' Sustainability will remain front and centre in the consumer psyche. This will continue to be apparent in the form of drought, wildfires and flooding as well as behavioural nudges from government, media and NGOs calling for consumers to consider the climate impact of their food choices.

We're moving into an era of conscious control, in which issues such as sustainability are so big that consumers expect the 'channel gateways' to help them make more positive purchase decisions and ultimately change behaviours – that's retailers, hospitality operators and government.

In this context, food waste will be increasingly important for consumers. Frozen food's

The frozen sector is undergoing a foodie revolution, as consumers of all ages are won over by its taste, health and budget credentials. Sustainable seafood, exotic fruit and veg year-round, sushi and sandwiches, heat-and-eat goodies – the aisle is a veritable treasure trove. And, with more consumers forward planning family meals and batch cooking, freezers at home are no longer just for vodka and ice cream.



The Food People: Top 10 New and Rising 2021-22

Photo: Plant-based Southern Fried Goujons
Company: Creative Foods



unique nature can help support consumers who want to cook and prepare what they need with minimal waste. We're also seeing a shift in the positioning of 'waste and by-product'. There are many examples of product innovations that bring waste, use of by-product and upcycling, in the context of environmental impact, to front-of-pack messaging.

One of the key challenges for consumers is the ability to make a positive environmental choice at the point of purchase

One of the key challenges for consumers is the ability to make a positive environmental choice at the point of purchase, in the same way they can for health (with traffic light schemes etc). There are several schemes currently being trialled in the UK. We expect this to continue to gain traction. Enviro labelling will become more established, spawning a new wave of innovation around environmental impact.

Whilst awareness and willingness to make sustainable food choices are increasingly evident across all demographics, it has particular appeal with Millennial or Gen Z shoppers. But marketing towards both Gen

Z (born 1997 onwards) and Millennials (born 1981-1996) can be a difficult proposition.

Gen Z are mostly interested in products' sustainability and the effect it has on the planet, whereas Millennials are more interested in calorie content and health

benefits. Over time, as wealth continues to transfer to these generations, sustainability and ethical considerations will need to become the standard and be transparent throughout the value chain.

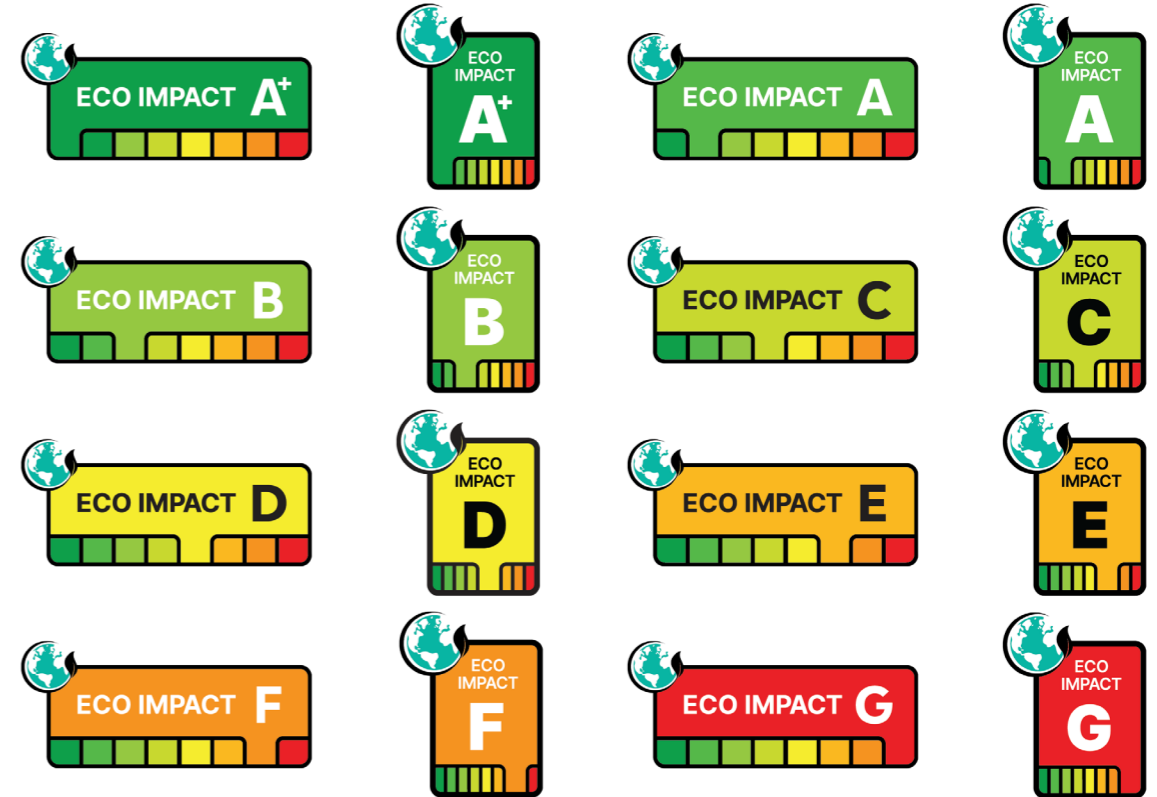




Photo: Vegan Lemon & Poppyseed Muffin
Company: Dawn Foods

5.6 Catering for an ageing population



Mark Smalley
Wiltshire Farm Foods

Catering for an ageing population is more complex than it may seem on the surface. The UK's population of people aged over 65 has significantly grown over the past two decades, representing one in every five people in 2019, with the most recent projections anticipating one in every four by 2039⁽¹⁷⁾.

Whilst this presents attractive opportunities for frozen food producers, the needs of the elderly consumer can be significantly different to younger age demographics. Nutritious food is a vital and vastly important consideration, with a balanced diet being essential to older age living. There is a requirement for more diversified destination categories that deliver high quality and enjoyable eating experiences, but also cater for a diverse range of often more complex dietary requirements.

Malnutrition affects over 10% of people aged over 65. The main contributors are the inadequate intake of energy and protein, which can be linked to a variety of social and

clinical factors. In addition, progressive loss of muscle mass, lowered strength and physical endurance and suppression of appetite are all typical of the ageing process.

These can often be hard to spot, but they can cause serious nutritional deficiencies resulting in an increased vulnerability to illnesses and other complications in later life. This has led to the demand for higher protein and higher calorie foods, which pack these required nutritional needs into smaller, more manageable portion sizes.

Swallowing difficulties known as dysphagia are another health condition common amongst the elderly with an estimated 186,000 people living independently in

their own homes having the condition. This affects the ability to swallow liquids or foods, can vary in severity and can be caused by numerous health conditions.

Food quality is high up the elderly consumer's agenda. With many over 75's growing up in an era before the explosion of fast foods and different cultural cuisines, home cooking is often the reference point and benchmark.

This has led to the requirement for specialist textured food categories, that make



swallowing safe, less painful and pack the required nutrition to eat for health and wellbeing.

To add to development complexity, food innovators have had to consider the dining experience – we all eat with our eyes after all – with revolutionary innovations in shaped pureed foods to stimulate appetite and mealtime enjoyment.

Food quality is high up the elderly consumer's agenda. With many over 75's growing up in an era before the explosion of fast foods and different cultural cuisines, home cooking is often the reference point and benchmark. Across core ready meal categories, innovation trends are not as prevalent or

fast paced amongst the elderly. Quality ingredients, consistency and traditional home cooked style foods are the focus for product innovation.

Top selling meals fall within the traditional British category, with roast dinners, pies and casseroles accounting for the highest proportion of core line sales. However, there have been recent shifts and growth towards categories such as Italian, Indian, Chinese and Vegetarian, most likely linked to the changing tastes of a new generation of over 75's entering the funnel.

Following on from the indulgence trend that emerged during the pandemic, there has been a small shift towards customers trading

up into premium categories. This is most likely because many elderly consumers have felt isolated and more nervous about venturing out of the home post-lockdown and are either treating themselves or being indulged by family members.

Following on from the indulgence trend that emerged during the pandemic, there has been a small shift towards customers trading up into premium categories.

Typically, elderly consumers are price sensitive. However, added value such as delivery and customer service are clear

triggers to command a slight premium in the home delivery sector. With many over 75's being less active, often spending more time at home alone without social contact, and with supermarket shopping trips physically more difficult, food home delivery is very attractive. Distinguishing and shifting service from transactional to building relationships is important, and customers will be willing to pay more for it.

This continued growth will inevitably place more reliance on pre-prepared frozen food categories.

The future presents a growing UK elderly population living longer with long-standing



Company: Wiltshire Farm Foods



health conditions, diseases and social factors such as loneliness and isolation, which will become more prevalent. This continued growth will inevitably place more reliance on pre-prepared frozen food categories and will enhance the importance and reliance of the role that frozen food will play.

Nutrition and food innovation will become ever more important to support wellbeing and maintain high living standards. This will be crucial to promote and support independence to remain in the home. Quality and price will play an important role with the emphasis on service in the frozen food delivery sector being a distinguishing factor for the premium a consumer will be willing to pay.

5.7 Introducing the 'store cupboard on ice'



Alex Pennial
Business Development Manager,
Daregal

The way in which consumers use their freezers is evolving along with views on quality, convenience, and the environment. Having to cook from home throughout lockdown encouraged many people to look at what can be stored in their freezers. So, we saw a shift in consumer behaviour. Increasingly, the freezer is



viewed as a 'store cupboard on ice,' as demonstrated by the surge in sales of frozen ingredients.

The frozen category responded well to reductions in shopping trips in 2020, by providing shoppers with easy and economical access to non-perishable goods. As a result, frozen staple items including herbs, vegetables, and fruit saw high levels of growth ahead of the frozen category. This is evidenced by volume growth of frozen herbs of 59% in 2020 versus 2019. The trend continued into 2021, with volumes still up 57% versus pre pandemic sales⁽¹⁸⁾. Fifty five per cent of shoppers will continue to use their freezers for staple frozen ingredients in the long term⁽¹⁹⁾.

Buying frozen essentials and using the freezer as a store cupboard means the consumer buys and uses exactly what's needed, rather than potentially over-purchasing.

Savvy shoppers now recognise that frozen ingredients offer an extremely convenient solution. Ingredients are on hand whenever needed. Individually Quick Frozen (IQF) herbs are a great example; there's no chopping, peeling, fuss, mess or waste. It takes a few seconds to grab the herbs from the freezer, sprinkle on the amount required, and then



place back into the freezer, easily adding extra flavour to everyday meals.

In uncertain times, consumers look for ways to save money, particularly by reducing their monthly outgoings on food and having as little waste as possible. Buying frozen essentials and using the freezer as a store cupboard means the consumer buys and uses exactly what's needed, rather than potentially over-purchasing. We can eliminate or reduce food waste by using the freezer in this way. Of course, this also saves money.

Food waste not only affects our wallets. It also has an environmental impact. We are an increasingly connected society with better

access to information and education. The 'Blue Planet effect' is still influencing our behaviour and choices. Socially conscious consumers are as committed to the health of the planet as they are their bodies.

A staggering 6.6 million tonnes of food is thrown away by British households every year.

This is having an impact on the way people shop as they change to more sustainable and responsible options. A staggering 6.6 million tonnes of food is thrown away by British

households every year⁽²⁰⁾. This has a direct impact on the environment and contributes to climate change, as well as increasing global food insecurity. Shopping frozen helps to minimise the amount each household wastes.

Historically, the freezer has not had the best reputation in terms of freshness. It's also carried a stigma, with some associating its low cost with poor quality. This is changing. In recent years, consumers have become more aware of the food they eat and the industry has worked hard to communicate the benefits of frozen, investing in innovation and creating more premium offerings.

A new generation is appreciating the locked-in flavour, freshness, aroma and vivid green of frozen herbs,

These stigmas are being broken down, particularly by Millennials and Gen Z consumers, who are entering the frozen ingredients category and showing higher levels of repeat purchasing. A new generation is appreciating the locked-in flavour, freshness, aroma and vivid green of frozen herbs, which have a much higher essential oil content compared to dried herbs. The herbs are harvested and frozen when they're at their optimum to lock in nature's true taste, sensation and colour.

As we slowly return to places of work and become more socially active post pandemic, consumers once again need convenient solutions to save time and money. The store cupboard on ice can provide this convenience with many of our core essentials being ready and waiting for our on-the-go lifestyles. High-quality frozen products are breaking down barriers for consumers to enter the category. Innovation within the category will continue to help recruit new consumers and reduce any antiquated stigmas. The frozen store cupboard gives consumers great flexibility to make cooking at home easier and tastier.



Food Waste Action Week Highlights
Company: WRAP

Photo: Plant-Based Kofta
Company: Brakes



5.8 Why food waste matters



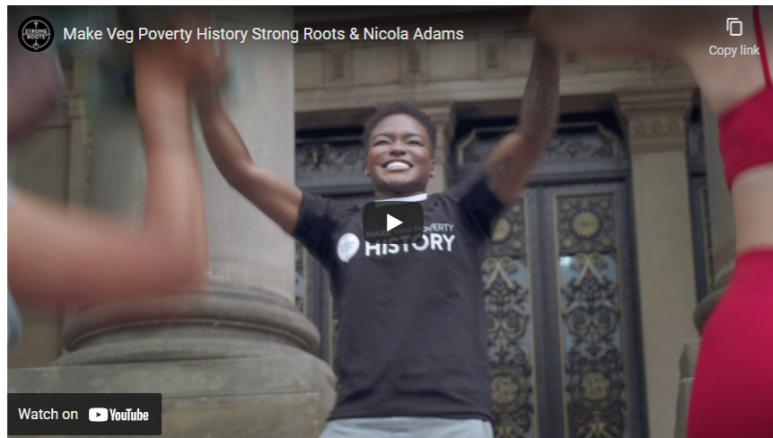
Emma Curtis

UK Managing Director, Strong Roots

Food Waste is one of the biggest social issues facing the UK. More than 6 million tonnes of food is wasted each year in the UK, with 2 million tonnes of that food still edible at point of discarding⁽²¹⁾. That means 7% of the UK population are struggling to avoid hunger. There is another issue: veg poverty. In total, 20% of people in the UK are in veg poverty, which means that they are unable to afford the recommended levels of fruit & veg to maintain a balanced diet. This can lead to numerous health issues

and stunt growth in children. Just as frozen veg can play a role in ensuring that children eat the correct amount of vegetables to grow up healthily, the wider frozen food sector can play a key role in ensuring that Britain hits its sustainability targets and shoppers of all ages live healthier lives.

Strong Roots established 'Make Veg Poverty History', long-term social mission to tackle food poverty, supporting those most in need with the means to eat a healthier, more nutritious diet. 2021 alone saw the brand donate freezers and frozen veg to numerous foodbanks throughout the UK.



⁽²¹⁾ Waste and Resources Action Programme (WRAP)

5.9 Home cooking makes a comeback



William Burton

Sales and Marketing Director, Ardo

Frozen vegetables and fruit have seen some dramatic changes, with consumer habits changing significantly from the initial early 2020 lockdown landscape, through the gradual summer reopening, only to see continued restrictions being reintroduced in early 2021. This drove great lifestyle changes and fundamentally altered the way people were purchasing and when, how and where they were consuming their food.

This led to more scratch cooking and food experimentation whilst the convenience sector declined.

Home cooking made a comeback. With the out-of-home landscape more fragmented than ever and periodically off limits, there were more opportunities for family meals at home. This led to more scratch cooking and food experimentation whilst the convenience sector declined.

At-home breakfast occasions increased, with people having more time due to reduced

Photo: BBQ Chicken Loaded Fries
Company: Foodpro Manufacturing Ltd



commuting. They could enjoy a more leisurely approach to breakfast, driving both a health and taste/enjoyment agenda, benefitting frozen fruit consumption across breakfast and lunch. The evening meal occasion saw families sitting and sharing meals together, a dynamic not seen for decades, driving significant demand increases in frozen vegetables and the use of frozen herbs within scratch cooking.

With many companies looking at a phased approach to staff returning to central office working and others looking to continue full flexible working for their staff, we predict the breakfast and lunch dynamics, whilst slowing versus full lock down conditions, will continue. In some cases, these changes could be permanent.

Online sales boomed to previously unseen levels and; whilst slowing remain hugely elevated.

These conditions also changed more functional household needs, further benefiting frozen. With access to bricks & mortar stores difficult, households wanted to ensure they had food in the house, without the risk of spoilage. Frozen food certainly ticked this box and this drove sales growth and greater category awareness. Even home freezer sales increased, as households built up mini food banks at home. Online sales



Company: Ardo

boomed to previously unseen levels and, whilst slowing, remain hugely elevated.

These new lifestyle dynamics, forced upon UK households by the pandemic, have significantly increased household exposure and awareness of frozen food but, as restrictions ease, people are returning to office working, schools, travel and previous bricks & mortar store habits.

However, many of the habits that have become routine since the start of the pandemic will remain. Retailers and frozen food producers will need to work hard to maintain this top-of-mind awareness, cementing the benefits and unique values of frozen food in the minds of shoppers.

A photograph of a rectangular flatbread pizza served on a wooden board. The pizza is topped with melted cheese, sliced mushrooms, and pieces of ham. The background is a dark, textured surface.

Photo: Delizia Italiana
Ham, Mushroom and Mascarpone Flatbread
Company: Heron Foods

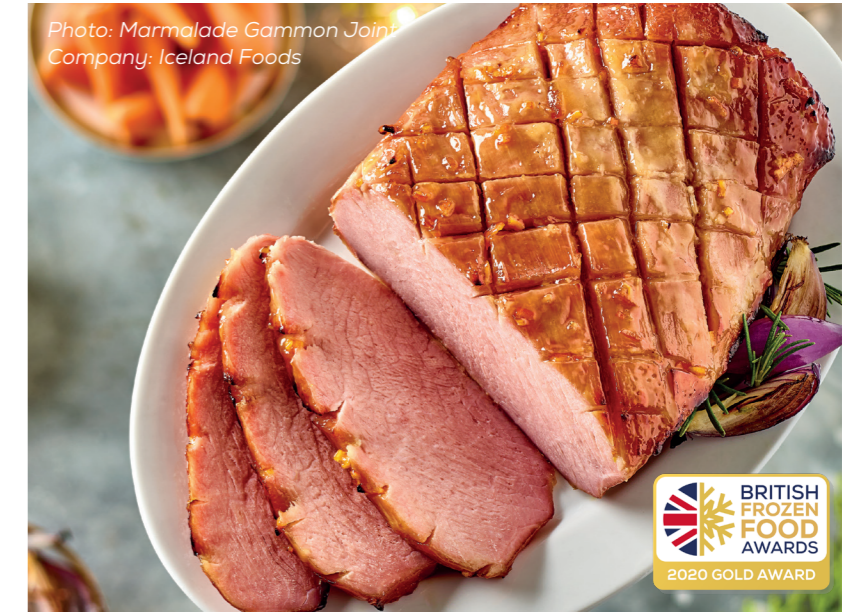
Category sponsored by
KANTAR

The logo for the British Frozen Food Awards, featuring a stylized sunburst icon to the left of the text "BRITISH FROZEN FOOD AWARDS" in a bold, sans-serif font.

Best New Pizza/Savoury Bread Retail
2020 HIGHLY COMMENDED AWARD

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6.1 Showcase Chapter Champion

Andrew Staniland
Trading Director, Iceland Foods

This September Iceland launched 250 new frozen products in one day, in response to consumer mindsets adapting to embrace the benefits of shopping frozen.

Since the pandemic, frozen food has seen a resurgence in popularity, especially amongst young adults and families who have adapted by shopping bigger and less often and filling their freezers. This boosted Iceland's sales by 30% and it's been growing ever since.

Over a quarter (26%) of 18-24-year olds are now buying more frozen equivalents of their regular fresh items and almost a third (31%) are trying new frozen foods such as meat substitutes. Generation Z has been paving the way during lockdown and is making frozen fashionable again with 40% of 18-24-year olds

stocking up on more healthy frozen options like vegetables, fruit, meat and fish.

But it is not just families and the younger generation turning their attention to frozen; a third (33%) of all UK shoppers are using their freezer more efficiently and a further one in five (21%) are including more frozen foods in their cooking.

When it comes to why shoppers are re-igniting their love for frozen, the cost saving potential of frozen over fresh has been a huge driving force. One in five (21%) have noticed how frozen items can be better value for money than fresh, and 17% agree they can get far more for their money by shopping frozen.

Our frozen sales have boomed over the past year or so and this has resulted in Iceland introducing its biggest-ever frozen new product development drive outside of Christmas. The frozen industry still must keep pushing on innovation if we want to be taken seriously by the consumer and one way that can be achieved is with association.

Now that shoppers are becoming savvier about the savings they can make by shopping frozen, it's the industry's job to keep demonstrating innovation in frozen. This will keep these new customers interested and entice even more to convert from fresh to frozen.

Having a dedicated team and a state-of-the-art development kitchen allows us to



keep improving and keep innovating for Iceland own brand and for others. Here we can offer the major players a service that enters them into the frozen market. Customer love big brands and when we get brands into the Iceland development kitchen it reaps rewards for us, for the brands and most importantly for customers looking to switch to frozen.

Customers want to see new product regularly. Plotting out new and innovative products throughout the year gets customers excited and keeps them returning. Offering big brands at great prices is a sure way to do this, so when you add exclusivity on brands into the mix, it's a great recipe for great sales.

Iceland currently has over 200 exclusive products with 20 brands and demand is like no other. The innovation with branded products starts with understanding your customer and what they like to eat, knowing the brands they already like and tapping into their eating habits such as where and when they like to eat out and how adventurous they like to be. Keeping up with the trends - the old, the new and exciting - all helps with the innovation process.

Favourite exclusive products that Iceland develops, such as with TGI Friday's, allow customers to feel like they are taking the restaurant experience home with them at a fraction of a cost. The most recent brand we have introduced is Piccolino, a luxury

Italian restaurant, which is different to our usual offering, but we have listened and understood that the demand for the 'dine out, at home' experience is on the up.

The new products that we've put in stores recently have been crucial in driving our strong growth. Being first to market with new, quality and exclusive frozen food products ultimately gives us the footfall we wouldn't normally have.

Photo: Margherita
Company: Iceland Foods



Category sponsored by
KANTAR

The consumer habits embedded during lockdown, coupled with the level of innovation within frozen food, mean that we are entering a particularly exciting period within the category and I'm looking forward to seeing how Iceland, its suppliers and other retailers maximise this over the next twelve months.



Character is revealed by crisis. And in the past two years of pandemic, BFFF's members have revealed their true characters, adapting to huge shifts in consumer behaviour and using innovative new approaches and products to emerge from this crisis stronger than ever. Here are some of the most compelling stories of innovation in the age of Covid.

6.2 Forging new routes to market



Lucinda Cohen
Senior Customer Planning Manager, ASDA

The pandemic has accelerated the growth of the online channel and particularly express options and Q-Commerce platforms such as Uber Eats. At Asda, we have moved rapidly to innovate and address the increased importance of such propositions for our customers. Whilst online channel growth appears to have stabilised, recent events such as the pingdemic and fuel crisis have highlighted the importance of being able to flex capacity at short notice and



Photo: ASDA Unattended Delivery Solution

these new avenues to access the online customer are critical to that.

At Asda, 10% of our dot com orders are now for same-day delivery or click & collect. We have also launched Express collection in over 300 stores. We are trialling express delivery from dot com and now offer this in 95 stores. These services allow customers to receive their groceries by choosing a slot within one to four hours. During the pandemic we also launched an unattended delivery solution to offer more capacity to customers quickly. Groceries are left in a secure locked box for which the customer can set the pin code. There are approximately 2,000 boxes located with customers and

they can hold frozen and chilled groceries using a method called passive cooling in the totes (sheepswool inserts and ice packs). Since launch, they have proved popular with customers, but we are undertaking some usage research at present before we embark on further roll out.

The pandemic also accelerated Asda's Q-commerce offering with our partner Uber Eats. Starting from just two stores in July 2020, we have rapidly expanded following early success and now offer Uber Eats from over 300 stores. Customers can order a range comprising more than 600 SKUs for delivery within 45 minutes including over 40 frozen lines. The mission of the Q-commerce

shopper is differentiated from dot com with shoppers looking for food for now, food for tonight, a treat or even distress purchases. We constantly review the range to ensure our offering matches these Q-commerce missions. From a frozen perspective we have recently added a range of pizzas, ice creams and frozen meats to support these missions with Ben & Jerry's Cookie Dough Ice Cream a top performing line. IGD estimates that the Q-commerce market in the UK is now worth £1.4bn annually and could be worth up to £3.3bn in the future.

The frozen department has been a key online beneficiary of the pandemic. At the peak of lockdown, online accounted for 31% of all

frozen sales at Asda. This performance has since softened as customers have returned to store but still remains high at 27%. To support the new frozen online shoppers and encourage further penetration of this category, we launched a 'Benefits of frozen' educational page. The page outlines key benefits of frozen foods such as nutrition, convenience and reducing food waste. The page has proved popular with customers with over 500k monthly page views and a click-through rate of 38%. We expect frozen foods to remain a key department in our online growth and market performance and we are working closely with key supplier partners to continuously improve the frozen online proposition for our Asda customers.





Photo: Iceland Clapham Store

6.3 Rising to the challenge of appliance poverty



Andrew Staniland
Trading Director, Iceland Foods

In July, Iceland launched its 'Fridgeable' labelling scheme to enable greater access to frozen food to the estimated one in 10 households (2.8 million people) in the UK who live in appliance poverty without a freezer. Fridgeable labelling helps to educate consumers on which frozen foods can be put straight into the fridge and how long those foods can be kept in the fridge after defrosting. It also helps families living without a freezer or with far too little freezer space to save money by accessing frozen food, which is often cheaper than the fresh equivalent.

Research shows that the average family weekly food shop is £60, however a family without the right appliances can expect to spend 43% more because they cannot buy in bulk or buy frozen goods. Frozen food has the potential to save families more than £1,000 a year. Iceland's aim is to make that potential a reality by making its trademarked Fridgeable logo and various other assets freely available to other retailers and brands.

The launch of Fridgeable labelling was across 15 products in Iceland's frozen meat and

burgers category. We are aiming to roll out Fridgeable across all applicable own brand ranges and its initial goals are to increase the amount of time people can store products in the fridge to up to 72 hours and to at least double the size of the range in the year ahead.

Freezing food stops the microbiological clock from ticking, locks in freshness and keeps food stable over extended periods, enabling most frozen products to have a long life when stored at -18C or below. The benefits of the Fridgeable scheme are less waste and more flexibility. There is also the benefit of being able to defrost and store items in the fridge for a period of time before use where freezer space in a household is limited.



Iceland had to overcome technical challenges when delivering Fridgeable including foods which are fairly stable from a microbiological safety/spoilage point when frozen, however suddenly become equivalent to "chilled high risk" products once defrosted. One of the biggest concerns was the growth of Listeria due to the fact that this bacteria is able to grow and multiply under chilled conditions (0 to 5°C).

Iceland has worked with suppliers to eliminate this risk by ensuring that they conduct a robust microbiological food safety risk assessment to ensure the suitability of each product. Iceland's technical team assessed where potential risks may occur, what mitigations can be put in place to overcome

these and ensure that defrosting and storage over a determined period of time does not render the food potentially unsafe.

We produced an Iceland Policy on Fridgeable, which details all aspects that need to be considered by suppliers who wish to manufacture fridgeable products that provides guidance as to the food safety requirements. It also details the steps that must be taken to validate the safety of the product once defrosted. As the food safety validation of this process can be costly, suppliers are guided by the policy to understand through the development process if defrosting before use has any detriment to the eating quality of products before any food safety validations are carried out.

Fridgeable is a unique concept in frozen food and launching this is a particularly proud moment for Iceland. It is another way that we can help reduce the cost of putting food on the table for those without a freezer.



6.4 Birds Eye's view of NPD across UK retail



Steve Challouma
General Manager UK, Birds Eye

It's well documented that the majority of new product developments (NPD) fail within the first two years of launch. 2022 and beyond is likely to be a crowded time for NPD as some launches were paused or put on hold because of the pandemic. At total grocery level, we have seen the fewest NPD SKUs live in-market for a decade⁽¹⁾. Over the last two years, NPD has shrunk faster than grocery has grown and only one in three launches continues to drive growth in its second year. In addition to this, retailers continue to rationalise ranges across frozen to simplify complexities in the supply chain and, due to the growth of online grocery shopping and products largely being picked in-store, retailers are keen to minimise the breadth of ranges to increase the number of facings given to each product on shelf.

Despite a challenging macro environment, we've seen nearly 800 new frozen products launch in the past 52 weeks (excluding ice cream). Just under 70% of NPD has come through own label ranges, while frozen desserts, fish, ready meals, poultry

and vegetarian saw the highest levels of NPD, accounting for 68% of total new lines. Desserts had the highest number of new lines and had arguably the biggest frozen launch of the year with the introduction of Little Moons. The viral TikTok sensation attracted mass appeal in January 2021 with over 150 million views worldwide and sales growing by over 2,000%.

Photo: Crispy Chicken Grills Company: Birds Eye



Of the major retailers, Iceland introduced most new frozen products. The retailer has focussed on three key areas: fish and poultry, big packs and exclusive brands. Throughout 2020, we saw a significant shift in shoppers' buying habits as, due to the pandemic, they switched to shopping less often but buying more in response to government restrictions that limited freedom of movement and risks attached to visiting stores.

We also saw a significant rise in freezer sales, suggesting shoppers had more physical space at home to store frozen products. This spurred innovation in 'big packs, better value' with Iceland leading the way. The retailer launched a wide range of larger 1kg and 2kg packs, especially across poultry and fish. These packs are most prominent in their out-of-town Food Warehouse store formats, due to their increased space and

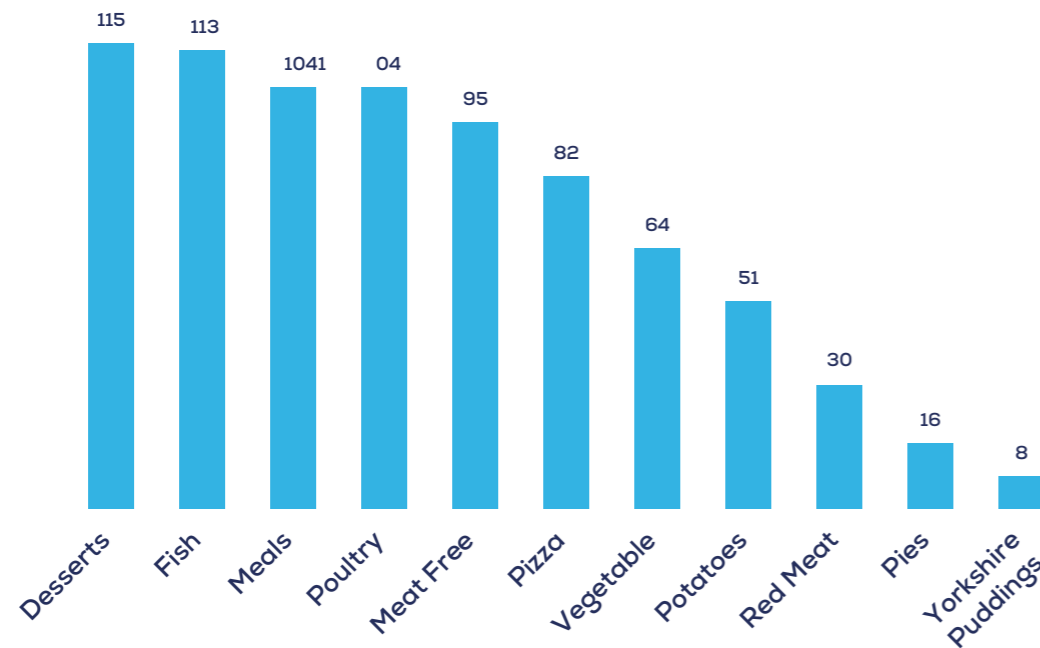
breadth of range. Iceland has also launched a wide range of exclusive household branded products such as Cathedral City, TGI Fridays, McCoy's, Ed's Easy Diner, Piccolino and Harry Ramsden's. It has dedicated space in-store to such brands, with distinctive point-of-sale activation and branding. Exclusive Iceland brands are also usually located first in flow to ensure visibility to all prospective shoppers. We've also seen Asda exclusively launch 67 Gino D'Acampo products across total store, 14 of which are frozen pizzas, ready meals and ice cream lines. With the continued rise of social media and celebrity endorsements, this is a general trend that is likely to continue.

have come via the Green Cuisine and Chicken Shop sub-brands. Building on the success of the Chicken Shop Burgers, which was the fifth biggest retail NPD launch in frozen foods in 2020, Birds Eye has launched an extended Chicken Shop and Sides range which includes Battered and Southern Fried Nuggets, Popcorn Chicken, Hot & Fiery Onion Rings, Hash Brown Potato Bites and Buttered Corn on the Cob. The range offers shoppers the opportunity to create a complete meal solution from frozen and bring the out-of-home dining experience in-home.

We have also significantly expanded our meat-free Green Cuisine range. The range has grown from five SKUs at the start of

Birds Eye's biggest NPD launches in 2021

Frozen NPD Categories⁽²⁾



2020 to 19 SKUs now, with the brand only launching in March 2019. Green Cuisine now has a market share of 8.6%⁽³⁾, up from 2.8% at the start of 2020. Green Cuisine now includes meat free alternatives of some of Birds Eye's most iconic products with its Fishless Fingers, Chicken-Free Dippers and Chicken-Free Burgers.

With HFSS restrictions on the horizon, we will likely see brands and retailers increase focus on healthier meal choices. Dr Oetker's recent launch of the Good Baker 'better-for-you pizza brand' is just one example of brands launching NPD that not only complies with the new HFSS regulations but also seeks to attract younger shoppers into frozen by addressing guilt, quality and sustainability barriers.

Since the pandemic we've seen significant growth in the lunchtime occasion with more people working from home. Brands will continue to look to capitalise on this trend by launching quick, easy meal solutions. We are also likely to see the meat-free trend continue to gain momentum with new brands entering the market and established brands looking to compete through innovation. In line with this, we've also started to see meat-free NPD aimed primarily at children, for instance Quorn's Roarsomes and Strong Roots' Little Roots.

Photo: Chicken-Free Dippers
Company: Birds Eye Green Cuisine



⁽³⁾ Nielsen ScanTrack | Total Market | Total Frozen Meat Free | 12 w.e to 09.10.21.

6.5 Coppenrath & Wiese on NPD



Rob Thomas
General Manager, Coppenrath & Wiese

The past 12 to 18 months have been interesting, and challenging, in retail. The landscape has changed considerably with the 'norm' no longer meaning consumers shopping around for the best offers but returning to the 'good old days' of purchasing everything under one roof. Retailers with significant non-food offerings and existing online platforms

have benefitted greatly. For many suppliers and retailers, the pandemic has driven huge expansion in online presence and alterations to daily practices with new worlds becoming virtual.

The new digital way of doing business of course also affected innovation and NPD, both so important to keeping categories fresh and maintaining retailers' end user loyalty. Retailer demands changed in the wake of every eating occasion now being at home with no friends or family get togethers. So what did this mean for NPD?

When we look at desserts, specifically puddings as opposed to ice cream, the market 18 months ago was in an ongoing but stable decline of around 5%. However looking

Photo: Jaffa Cake
Company: Coppenrath & Wiese UK



at the category today, spend is up 1% and was up by 4.6% in May 2021⁽⁴⁾. NPD has been key to attracting new, younger shoppers into the market. To keep attracting this new wave of consumers innovation has to move quickly and bring contemporary and fresh concepts to retail whilst maintaining the interest of critical core customers. Iceland has proved expert at this with collaborations such as TGI's New York Cheesecake and partnerships with Great British Bake Off and Mary Berry.

Examples of products designed to bringing the 'eating out' occasion inside the home also abound. Clean, contemporary flavours have hit the market in the form of products such as Tesco Passionfruit Gateaux, Asda Jaffa Cakes and Morrisons Raspberry Gateau

Bars. Discounters were not to be outdone and, with less of an online presence, it meant their NPD had to work even harder to get shoppers in store with clear differentiation between value, core and premium.

In frozen, quality and convenience are king, as the success of products such as the Birds Eye steam fresh bags show. The growth in vegan and free-from NPD continues to attract younger, more health-conscious shoppers who are looking for lines like frozen fruit, low-calorie ice cream or frozen veg.

The challenge going forward, of course, will be addressing the environmental impact of all food products and communicating the benefits of frozen. Finding environmentally-friendly packaging materials that are fit for

purpose, meeting government guidelines whilst also allowing suppliers to meet NPD brief targets as well as maintaining cost effectiveness and managing economies of scale will be crucial. There have been some great achievements in finding solutions, showing that suppliers can rise to the challenge.

With new HFSS regulations looming, NPD will continue to evolve. The trend for sharing (albeit on a smaller scale), a quick fix and tonight's tea represents a big opportunity for retailers to provide easy solutions with tempting meal deals that will increase impulse purchases, encouraging consumers to buy additional items. With likely additional floor space/longer aisles, NPD will need to grab shoppers' attention. In-store signage, in-aisle feature space and packaging differentiation will be crucial. The traditional bi-annual range refreshes may become bigger events and the 'wow' factor will need to be bigger than ever.



Photo: Strawberry Frozen Yogurt
Company: Ice Cream Treats



Company: Ardo

6.6 Sustainable pallet-handling for new deepfreeze



Ross Hunter
VP Commercial UK, NewCold
Advanced Cold Logistics

In 2017, NewCold Advanced Cold Logistics designed a bespoke pallet handling pod for its Wakefield deepfreeze storage facility. Now we're looking to apply the same energy-saving technology to our new site in Corby, due to open in the first half of 2022. The pod bridges the gap between the deep-frozen production or storage environment and NewCold's auto-loading 44-pallet double-

deck trailers, while significantly reducing physical handling and cutting emissions using electric-powered refrigeration.

Accordingly, as soon as a product leaves the production line at -22°C , it is automatically loaded through a sliding door at the back of the 60-pallet-capacity pod, which itself is pre-cooled to the same temperature. From here, the pallets are automatically transferred into a double-deck trailer, docked to the front of the pod. Meanwhile, three refrigeration systems hold the temperature at a constant -25°C and, being electric, keep harmful emissions to a minimum.

With loading into the pod completed in just five minutes, every deep-frozen package or pallet remains at a constant set temperature of between -22°C and -25°C , and at no time during its journey from the production line

to completed loading in the trailer does any pallet need to be exposed to an ambient environment or touched by an operative. This not only ensures absolute temperature integrity but virtually eliminates product damage.

The same process is reversed when the load reaches the NewCold warehouse, where automatic unloading capability unloads the

trailer, again in approximately five minutes, directly into a frozen storage facility, ensuring best product integrity and quality. Faster turnaround times reduce supply chain cost and by linking directly to production loading, efficiencies are achieved at production sites. Our innovative double-deck trailers then make a positive impact on the environment by significantly reducing road miles.



Photo: NewCold Advanced Cold Logistics

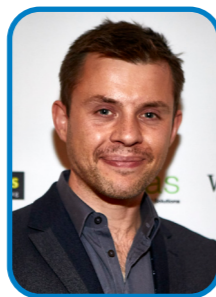


Photo: NewCold Advanced Cold Logistics



Photo: Cookies & Cream Tower
Company: Oppo Brothers

6.7 Quality is king for healthier ice cream



Harry Thuillier
Managing Director, Oppo Brothers Ice Cream

The fastest growing trend (though not the one with the most shelf space) in ice cream is in 'better for you' and 'better for the planet'

indulgence, with the coming HFSS (high in saturated fat, salt or sugar) regulations promising to give consumers more balanced options to help the country tackle an obesity epidemic that kills many times as many people as COVID in more 'normal' years.

But with this being kicked down the road several times, some retailers have become complacent in their appetite for healthier innovation and are pushing launches back. Others are planning ways to sidestep the ban on promoting unhealthy foods by finding legal loopholes and rearranging store layouts to ensure they are still visible.

As someone who runs a company focussed on creating feel good ice cream that's better for health and planet, this behaviour is deeply disappointing. But I can see their point. The rapid decline of both Halo Top and Breyer's Delights, frozen desserts that prioritised calorie reduction above all else,

can't be explained simply because of the wet summer we have just had. They were experiencing heavy losses in rate of sale and distribution even in 2020, when little luxuries in supermarkets were one of life's few pleasures under a hot lockdown. Ice cream as a whole, had a bumper year.

Meanwhile, another hyped segment, dairy-free, hasn't seen the growth that many of us in the category would like and has lost some of its lustre with buyers tasked with getting new customers into the frozen aisle.

Why? As is always the case in indulgent categories, it is quality and taste that create repeat sales. Brands that resonate will be brands who are almost 'accidentally healthy'. Those brands who did create strong growth over the last year were either portion controlled or super-premium low cal (in 2021 Oppo Brothers UK retail sales grew by 25% whilst Haagen Dazs shrunk by 5.4% and Halo Top shrunk by 22%⁽⁵⁾), as consumers showed their desire to indulge in luxury without compromising health.



Photo: Belgian Chocolate Salted Caramel Ice Cream Sticks
Company: Oppo Brothers



Photo: Waffles with Strawberries & Double Chocolate Brownie
Company: Oppo Brothers

While there's been lots of buzz around non-dairy with the flexitarian movement going strong and 'plant-curious' eaters experimenting with vegan options, low calorie brands that don't compromise on taste are still by far the biggest sub-set within ice cream. It seems that alt-milk in this most indulgent of categories is taking longer to be trusted by consumers than is the case in more functional areas of the store, as can be seen by Oatly and Alpro's small presence in frozen vs their dominance in the ambient aisle. Meanwhile, the growth of flexitarianism has also meant that high quality dairy is

in demand as consumers become more conscious of provenance, animal wellness and, of course, the environment.

Whatever the ingredients, ice cream will always be about enjoyment. And with an increasing number of consumers entering the frozen aisle with an expectation that ice cream doesn't have to be the junk food it once was, the category is ready to bounce back in 2022 with a raft of innovation to format and ingredients.

That is – if retailers will let it.

6.8 Strong Roots driving plant based snacking sales



Emma Curtis
UK Managing Director, Strong Roots

Meat free is arguably the hottest area of the supermarket when it comes to NPD and innovation. With the ever-increasing demand in vegetarianism and veganism, the category is a hot bed for new brands attempting to introduce their meat alternatives to a mass audience. New brands have accounted for sales worth £5m

in the frozen meat-free category over the past year⁽⁶⁾.

With the rise of the likes of Strong Roots and Birds Eye Green Cuisine, this has led to difficulties for heritage brands Quorn and Linda McCartney, who have lost £10m between six market share percentage points⁽⁷⁾. As mentioned in chapter one, people are moving from meat analogue products into plant-based, primarily for health reasons due to concerns over the processing levels of analogue food. Plant-based foods are also more likely to pass new HFSS laws that will be implemented in October 2022. The amount of salt and fats in certain meat analogue SKUs put them at a higher score than their meat counterparts.



Company: Strong Roots

The biggest sub-category trend seeing growth within Frozen meat-free is snacking, which is up 87%⁽⁸⁾ and has pumped £6m into the category. Plant-based growth is ahead of meat analogues here, at +91%. The number one plant-based snacking SKU is the Strong Roots Spinach Bite, which has achieved annual sales of £1.3m⁽⁹⁾.

Snacking's growth is due to the changing of mealtimes during the pandemic. The British workforce eats 1.4 billion lunches a year⁽¹⁰⁾. These lunches, pre-Covid, were primarily eaten in the office, with a high percentage bought on-the-go from fast food retailers or convenience supermarkets. During the pandemic, this changed, and consumers started snacking more in the home, with the ability to use the oven during working hours. Post pandemic, we can expect the snacking category growth to continue as people are looking for high quality, healthier snacks that are quick & easy to cook in a time precious world.

Strong Roots has identified a gap in the market for quick, healthy, convenient snacks that are Toaster Friendly and ready in minutes from Frozen. Perfect for breakfast, lunches & on-the-go. Their Hash Brown & Burger products are all Toaster Friendly and can be ready to eat after just two pushes of the button.

The slow return to pre-pandemic consumption patterns combined with



Photo: Spinach Bites
Company: Strong Roots



mounting economic pressure open the door for Strong Roots' toaster-friendly range to become synonymous with quick breakfasts before dashing out the door or being the ultimate convenient treat when arriving home after a hard day's work.

When a recession hits, the two channels that benefit most are discounters and premium retailers. The discounters see growth, unsurprisingly, as people have less money in their pockets than usual, while premium channels, and the brands within them, see growth as people who cannot afford to eat out with the same regularity, attempt to bring the dine-out experience into the home.

This can be seen in the latest NielsenIQ update, which shows that Aldi, Lidl, Waitrose and M&S are the only retailers in growth, whilst all of the Big Four are in decline as the mid-tier suffers⁽¹¹⁾. From a brand perspective, this means that own label, low average selling price (ASP) and premium brands will thrive whilst mid-tier brands will struggle as they start to compete for a shrinking portion of the market.

The trend of bringing the dine out experiences into the home has been seen through Iceland exclusive deals with traditional restaurant brands being a success. Over the past year – Greggs and Itsu have moved into the frozen meat-free category with strong results. In the chips and potatoes category, TGI Friday's has seen



Photo: Spicy Veg Bao
Company: itsu [grocery]

success with its range including loaded fries. As recession hits and consumers want to enjoy their dining treats in the home, more of this is to be expected.

Within frozen chips and potatoes, the category has seen an increase in average selling price (ASP), with numerous major brands competing to own the 'premium' space. The results have been mixed, with many brands struggling to rid themselves of the 'family favourite' shackles in a bid to become premium. At Strong Roots, we've enjoyed huge success with our Sweet Potato

Fries – their share of the Sweet Potato Fry category has grown from 19% to 36% over the last two years, all whilst maintaining the highest ASP in the market of £2.59. With the consumer now wanting to replicate dining experiences at home, there are likely to be more high-ASP chips and potatoes lines entering the market in the near future.

6.9 How frozen out-performed fresh in Covid



Charlie Burton
Strategic Merchandising & Pricing
Director, Brakes

The pandemic has had a materially negative impact on volumes sold across the hospitality sector. Brakes was not immune to this and saw double digit declines. We note, however, that frozen has declined by 6% less than chilled over the latest twelve-month period⁽¹²⁾. Our analysis suggests that this switch was a function of customers changing their behaviour, as opposed to the vagaries of sectoral mix fluctuations during and post lockdown.

This was particularly noticeable across the meat and delicatessen categories. We heard from our customers that this was a deliberate attempt to reduce wastage and manage costs. Many customers reduced the number of dishes offered on their menus, favouring a "back to basics" approach – do a few things well. In this context the lower selling proteins were still easier to manage in frozen rather than chilled form (e.g. duck, corn fed chicken breasts, etc). And traditional favourites like burgers and pizzas drove even more growth into frozen.



Photo: Vegan & Gluten Free Chocolate & Raspberry Tart
Company: Brakes

In terms of new product development, we saw several hospitality customers flipping their business models towards take away options. This narrowed demand down to products that held up well in takeaway format, whilst also increasing demand for food packaging. The biggest longer-term food trend remained the rise of vegan and meat free. These categories have doubled in size over five years and are both now worth over £600m⁽¹³⁾ per annum. Brakes' best-selling burger is now (remarkably) a meat-free variant, and we saw strong sales this year from the launch of our plant-based Cumberland sausage.

Inevitably, Covid-19 prompted an increase in individually wrapped products to minimise

handling. Often this benefited frozen lines over traditional chilled buffet style solutions. Separately, the imminent introduction of Natasha's Law caused a continued increase in the requirement to show clear ingredient and nutritional information on pack and on website. This applies directly to products sold "pre-packed for direct sale" and has had the secondary impact of further increasing demand for pre-wrapped products. One of our most successful launches this year was our flow wrapped Danish Pastry Selection.

Although the Covid position will change in ways we struggle to forecast, the underlying trends of plant-based, healthy eating and safe eating/labelling look like they are here to stay.

Photo: Plant-Based Cumberland Sausage
Company: Brakes



Photo: Sweet Chilli Falafels
Company: Paramount 21

6.10 What's driven foodservice NPD in the pandemic age?



Jenny Kenyon

Marketing Director, Paramount 21

Having dishes that are nutritionally well-balanced and full of flavour is crucial in today's market. One area highlighted by customers is the lack of healthy options when eating out. Providing these options could give you the edge over your competitors. With a growing trend towards calorie labelling on menus, this is something that will become increasingly important to consumers.

Top tips for foodservice operators:

- Offer the option to enjoy a curry with cauliflower rice for a lighter alternative.
- Using frozen 'ready to cook' dishes will help food businesses keep track of calories when putting together menus.
- Fishcakes are a great, filling option for light lunches, simply oven cook and serve two with a large salad.

The high-low mix

This fashion and homeware hack of combining lower-cost with more bespoke or high-end items can also be applied to the foodservice industry. With a shortage of hospitality staff, using ready to cook frozen products that require low skill to prepare, mixed with high-quality local ingredients, will result in a dish that looks expertly created but is hassle-free.

Delivery

With delivery and takeaway sales nearly trebling since 2019⁽¹⁴⁾, operators should focus on bettering their offering in these areas. Developing a range of healthy takeaway dishes has big potential for extra revenue. After all, 70% of the public would be more

likely to order from delivery apps if they had a wider choice of healthy options available⁽¹⁵⁾.

Takeaways from brands already offering dine-in need to maintain the same level of quality customers see inside a restaurant. For example, when Bone Daddies discovered issues transporting ramen, they switched their business model to only deliver chicken wings, via the spin-off brand Wing Daddies.

During the pandemic, some brands even offered music playlists to complement their takeaways and included branded napkins and greaseproof paper. Not only do these touches increase brand recognition and loyalty, they can create valuable moments for sharing on social media.

Photo: Mozzarella Bites
Company: Paramount 21



At Paramount 21, we've observed four key trends that have been influencing foodservice since the start of the pandemic and that we predict will continue to be crucial in 2022:

1 Indulgence and Comfort

When the wider world is uncertain and stressful, consumers look to make their own worlds more comforting. Nostalgic classics, family sharing, and home-style comfort dishes have all seen a resurgence. Think warming fish pies, mac 'n' cheese, baking of all varieties, and plenty of pasta dishes.

2 Health & Wellness

A focus on wellbeing continues to be a huge driver of behaviour. The pandemic has pushed concerns for physical and mental health higher up the agenda, with a more holistic view of wellbeing now incorporating areas like sleep, nutrition, and gut health.

3 Plant Power

The plant-powered revolution shows no sign of slowing and is now an essential part of menus. An estimated 5 million people tried Veganuary in 2021, and the trend for Veganuary NPD across foodservice and retail will continue into next January and beyond. But most new plant-based consumers aren't strictly vegan! Real growth will be seen in flexitarian or 'vegan-ish', with Mondays and Wednesdays the most popular days for a vegan takeaway as people balance healthier meat-free days with indulgence.

4 Gluten Free

One in 10 people in the UK are gluten-intolerant⁽¹⁶⁾, and with even more avoiding gluten for other health or lifestyle reasons, it's essential to provide great-tasting vegan, vegetarian & gluten-free options.

7. Conclusion



Ian Stone
BFFF President and Chairman of
the Board of Directors

As Chairman of the British Frozen Food Federation, I hope you have found the report to be both interesting and informative. I feel it captures how varied, dynamic, and forward thinking our industry is.

It is clear we face many challenges both as an industry and as part of the wider food supply chain. The last two years have seen us all confronted with challenges we could never have dreamt of, even in our wildest dreams.

Despite this our industry continues to thrive. In retail consumers seem to have rediscovered frozen, especially the younger generation. They are beginning to understand the benefits of Frozen, from the nutritional advantages to the effect on reducing household waste. Plus, the wide range of products now offered in the category from frozen herbs to smoothie mixes and the ever-expanding range of meat-free or free-from products. All delivered with brilliant value for money.

In foodservice, we offer great products that can help with labour and skill shortages. Also, with many professional kitchens still recovering from the various restrictions that resulted from the pandemic, frozen can help control costs. Past research by the BFFF showed using frozen ingredients vs fresh saved over 20% in costs.



This rose to 50% if fully prepared frozen meals were chosen⁽¹⁾.

As an industry, we continue to garner the newfound enthusiasm for frozen food and celebrate its' benefits - particularly quality and value for money. We need to ensure that all caterers - whichever sector - see frozen food as a real option, not just a purchase of last resort.

As a nation we waste 9.5m tonnes of food per year. Of that, nearly 7m tonnes is simply

thrown away. By encouraging consumers and professional chefs to buy more frozen food we could dramatically impact this figure. Fresh vegetables and salads are the largest single area of food waste with 3m carrots and 1m onions alone being thrown away every single day.

Manufacturing a frozen product is often undertaken with longer production runs, resulting in less change overs, minimising lost raw materials; a more efficient process from start to finish.

You will have read all the good work we are doing as an industry. However, we continue to ensure we grow, harvest, manufacture and distribute our products in an ever more sustainable way. We need to demonstrate that we use resources even more carefully than we do today, that we minimise waste in the processing of products and that we are efficient in the use of energy.

To reinforce the message around food wastage the Federation is planning to run a Frozen Food Week in September this year. The theme of the event will be the role that frozen can play in reducing food waste.

So, to consumers and caterers who ask how they can reduce their food waste and become more sustainable- the answer is very simple - just buy more frozen!

8. Acknowledgements

Thank you to all the BFFF members that contributed to the 2022 Frozen Food Report. The BFFF received an abundance of really interesting content, some members contributions were very similar or crossed over into other areas, so the federation has worked with the report editors to pick out the key messaging to structure the contributions into the 2022 Frozen Food Report.



Thank you to NewCold for sponsorship of the Frozen Food Report.



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Hugo Mahoney
Brakes, Foodservice Chapter Champion



Shane Meharg
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Cameron Moffat
Young's Seafood, Sustainability Chapter Champion



9. Young Leaders' Forum

Led by Holly Jones and Harry Hinks, the concept of the Forum is to support the young leaders in our industry in their development. With restrictions lifting the forum has now started to book on-site visits and live sessions to support the progression of the group, with a full year of forum meetings booked for 2022.

If you are interested in joining the YLF please contact us. Ideally aged between 18-30, applicants will be considered on their own merits.



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Charlottes main responsibilities include contributing to the overall marketing plan and researching key insights to present to their customers.



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Joanne manages half the Grocery and Online sales portfolio at Strong Roots.



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Mark leads the commercial category strategy to optimise the sales and profitability of a product portfolio of 350 meals.



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Jessica manages all digital marketing and activity for the UK's No1 Ice Brand.



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Shane delivers Magnavale's marketing and branding, market research, public relations, and Sales Process.



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Peters delivers business transformation through sustainable organisational architecture.



If you are interested in contributing to the 2023 Frozen Food Report or are interested in joining the BFFF then please contact katemiller@bfff.co.uk

If you would be interested in joining the Special Interest Groups on Packaging and Sustainability then please contact us.

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