



Vypr



**BRITISH
FROZEN
FOOD
FEDERATION**

October 2024



Freezer space
and shopping
trends - frozen
food in focus

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This report has been brought to you using Vypr's latest insights, gathered from a proprietary consumer panel of 80,000 UK individuals representing the national demographic in partnership with the British Frozen Food Federation.



Introduction

The frozen food sector presents untapped opportunities for growth, particularly as consumer habits evolve in response to limited freezer space and shifting shopping priorities. Vypr's latest insights, gathered from our proprietary consumer panel of 80,000 individuals representing the national demographic, reveal critical trends that can reshape how retailers approach frozen products.

These insights highlight both the barriers and preferences of British consumers, shedding light on the actions that could unlock the category's full potential. With cost-of-living pressures increasing, the need for convenient, cost-effective solutions has never been greater, and frozen food could play a pivotal role. This report delves into the key findings and actionable strategies to enhance consumer engagement with frozen products.

Highlights

Pg 4 - In Brief

85% of consumers limit frozen food purchases due to insufficient freezer space and only 20% of British households have adequate freezer capacity.



Page 7 - Consumer Desires: Product Variety and Promotions

Younger consumers, expressed a preference for better placement and clearer labelling of frozen products in-store. Addressing these desires could help shift consumer behaviour toward more frequent frozen food purchases.



Page 8 - Frozen Food and Food Waste Reduction

44% believe frozen food aids in portion control, allowing them to use only what is needed, while 34% feel that frozen food helps reduce waste due to its longer shelf life.

In Brief

From freezer space limitations to shifting shopping habits and product preferences, these key points highlight the opportunities and challenges within the frozen food sector.

Freezer Space Restraints: 85% of consumers limit frozen food purchases due to insufficient freezer space and only 20% of British households have adequate freezer capacity.

Preference for Chilled Replacements: 60% of consumers would buy more frozen meats and fish if space allowed, while 53% would increase purchases of frozen vegetables and fruit.

Strategic Store Restructures: Only 7% of shoppers visit the freezer section first, with 44% visiting chilled sections as a priority. 68% prefer fresh or chilled food, but 32% recognize they should buy more frozen items for convenience.

Reduce Waste with Variety: 46% of consumers seek more variety in frozen food products, and 50% are actively reducing food waste due to rising living costs.

Unlocking the consumer mindset on frozen food

Freezer Space Constraints and Purchase Behaviour

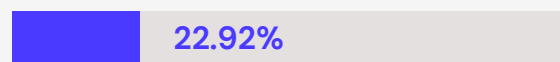
One of the most significant barriers to purchasing frozen food is freezer space. A staggering 85% of consumers report that they limit their frozen food purchases due to inadequate freezer space. This indicates a major pain point for shoppers, with only 20% of British households having sufficient freezer capacity. This constraint prevents them from purchasing more, despite the desire for frozen options such as meats, fish, and vegetables.

How often do you limit your frozen food purchases due to lack of freezer space?

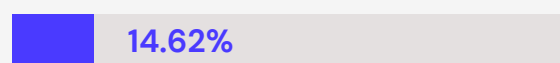
Occasionally



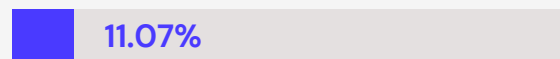
Frequently



Never



Always



Frozen Food Demand by Category

If freezer space were not an issue, the data shows strong demand for certain frozen products. 60% of consumers would buy more frozen meats and fish, while 53% would increase their purchase of frozen vegetables and fruit.

Interestingly, younger consumers, especially Millennials, show a higher preference for ready-made meals, snacks, and desserts, while Gen X leans toward fruits and vegetables. This presents an opportunity for retailers to align product offerings with demographic preferences.

Shopping Habits: Fresh vs. Frozen



Only 7% of shoppers visit the frozen food section first

Despite the convenience of frozen food, it often takes a backseat to fresh and chilled options. Only 7% of shoppers visit the frozen food section first, with the majority gravitating towards chilled sections (44%).

Additionally, 28% of consumers consistently prioritise fresh or chilled food over frozen. This suggests that frozen food is viewed as a secondary option, even though 32% of consumers acknowledge they should prioritize it more often for its convenience and longevity.

Consumer Desires: Product Variety and Promotions

When asked what would make them more likely to buy frozen products, 46% of consumers cited the need for more variety in frozen food offerings. Additionally, promotions play a significant role in driving purchases, particularly for consumers aged 44 and above.

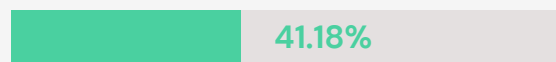
Younger consumers, meanwhile, expressed a preference for better placement and clearer labelling of frozen products in-store. Addressing these desires could help shift consumer behaviour toward more frequent frozen food purchases.

What would make you more likely to shop in the frozen section before chilled or fresh items?

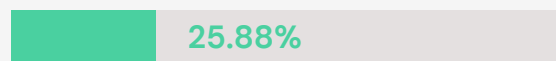
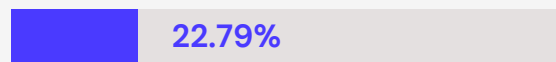
More product variety in frozen foods



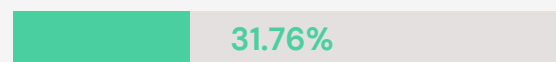
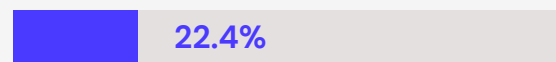
More promotions on frozen products



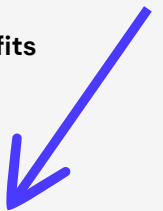
Better placement of frozen products in-store



Clearer labelling of nutritional/sustainability benefits



- Nat Rep
- Age 25 - 34



Frozen Food and Food Waste Reduction

Frozen food's ability to help reduce food waste is a key selling point for many consumers. 44% believe frozen food aids in portion control, allowing them to use only what is needed, while 34% feel that frozen food helps reduce waste due to its longer shelf life. In light of rising living costs, 50% of consumers are actively seeking ways to cut down on food waste, and frozen food could be a crucial part of their solution.

In Conclusion

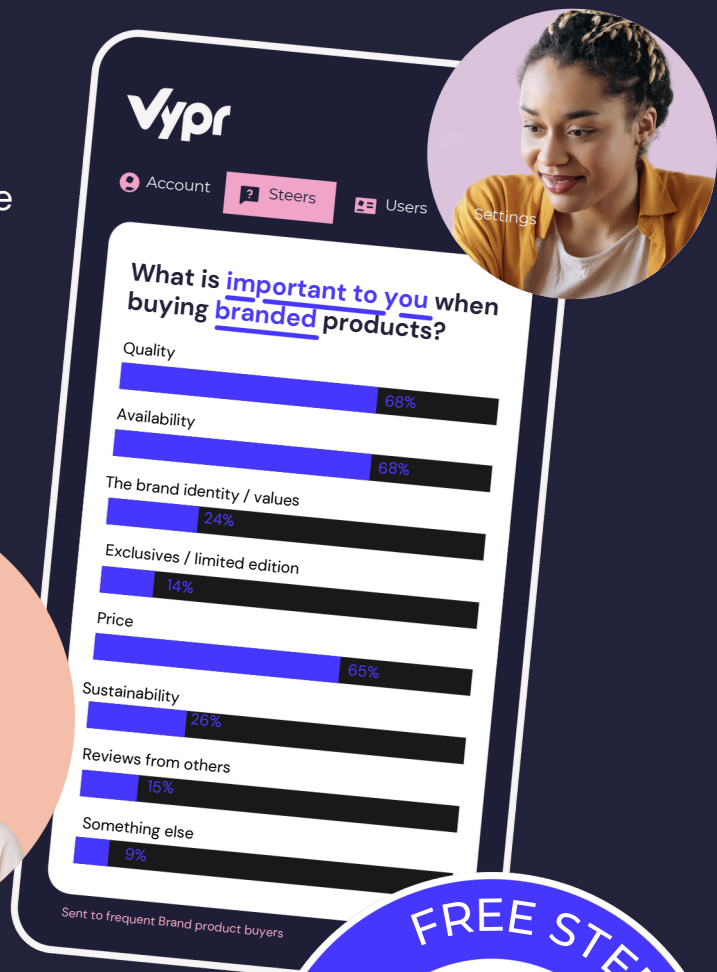
The insights from Vypr's community data underscore a strong demand for frozen products, tempered by practical limitations such as freezer space and product variety. Consumers are looking for ways to integrate more frozen items into their shopping habits, and retailers have a clear opportunity to influence this shift by addressing space constraints, improving the visibility of frozen products, and offering targeted promotions.

By prioritising frozen food more, retailers can help consumers manage costs, reduce waste, and enjoy greater convenience in their meal planning. The underutilisation of the frozen section, despite its potential benefits, highlights the need for a renewed focus on this category.



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