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During the last 20 years, the Frozen Foods Year Book, and now the Frozen & Chilled Foods Year Book, has become widely regarded as the "Bible" of the industry, providing a detailed, cross-referenced guide to all aspects of the trade.

The directory section is an alphabetical list of all the main manufacturers, wholesalers, retailers and distributors of frozen and chilled food products, machinery, packaging, ingredients, and suppliers of all kinds of ancillary services to the industry. The "Suppliers of" sections list specific products under sectoral headings (meat products, fish products, vegetables, desserts and so on) and the companies who supply those lines. The processors and agents tables show which product sectors companies operate in, while other sections of the book cover trade, technical and consultant organisations, wholesalers (with a geographical guide), BFFF and UKAFFP members, plant and materials and packaging and packaging machinery suppliers.

For the first time, this year's edition includes an editorial section, looking at current activity in the frozen and chilled food markets and outlining the activity of the main representative body on each side — the British Frozen Food Federation and the Delicatessen & Fine Foods Association. There is a guide to the handling and merchandising of deli produce by Michael Heal of DAFFA, an interview with Brian Hendley of leading product development consultancy KAE Developments, and coverage of Cambridge Fast Foodfax top 10 and 20 product tables for 1986. David Davies, editor of Frozen and Chilled Foods, also looks at the way the industry has changed over the forty years (not all under his editorship!) that the magazine has served it.

The addition of editorial will further enhance the Frozen and Chilled Foods Year Book as an indispensable aid to trading in this most dynamic of industries.

ICE 'N' EASY DOES IT

DAVID DAVIES

Forty years of evolution

Frozen and Chilled Foods magazine, under a number of titles, has been in existence for very nearly 40 years. It has evolved alongside the frozen food industry, which during that time has seen myriad changes and developments, and yet there seems to be no end in sight for the repeated use of the word "innovation" among the pages of the magazine.

Even in the relatively short span of the four years I have edited the trade's leading journal, the rate of development of products (of a genuinely *new* nature), processes, packaging forms and *uses* of frozen and chilled foods has been quite staggering. They have not been random changes and innovations, however. While many product developers and marketers like to believe that they have created a demand for certain products and product sectors, change has tended to come about in response to social trends, and the current happenings in the food market are very much linked to the requirements of a changed and changing society.

The main strength of frozen foods now, or the main reason for their being attractive to the consumer, is very different from the original reason for food freezing being invented, and this evolution has also seen a new role for chilled food — alongside frozen and also in its own right.

Freezing was naturally a means of keeping food in a wholesome condition for long periods, but why was that necessary? One of the basic economic principles of buying *anything* consumable has always been that the more you buy at a time, the cheaper the unit price would be. Bulk buying of flour, sugar, coal, firewood and a multitude of other things has been going on for centuries. When it was found that perishable foodstuffs could be frozen and then eaten in good condition months later, the principle could be employed in food buying in a massively wider way than ever before. After two decades of development in frozen food many households took advantage of the principle; a large chest freezer in the garage or outhouse would accommodate half a sheep or pig and enough ice cream, vegetables, fish fillets, chops and so on to last for months. All could be bought in at a fraction of the cost of buying them fresh every few days. Conclusion: frozen food became one of the greatest ever developments in household economy.

Many is the time I have described this historical state of affairs to people, usually in the trade, who have said "But I still use the freezer like that". That certainly isn't the norm any more, though, and when their ancient electrical facsimile of Napoleon's tomb finally gives up the ghost, they will have to use their connections in the wholesale or retail trades to find another one. Almost all sales of domestic freezers are now of the compact, upright, and often combined fridge-freezer type, and their contents are worth vastly more per lb than those of their lumbering forebears, even allowing for inflation.

The power of the word "economy" has been superceded by that of "convenience", and far from using frozen food as a means of stretching money, it is used as a "frozen larder". The fastest growth in frozen food sales is in ready meals and other sophisticated valued-added products.

The same is true of chilled foods in turn. I have heard and read claims for the size of the chilled market at anything between £1 billion and £10 billion, depending on the kind of products included, but the key factor again is that the most rapid growth is in value-added areas with convenience as a selling point, rather than in commodities like meat, bacon, cheese and so on.

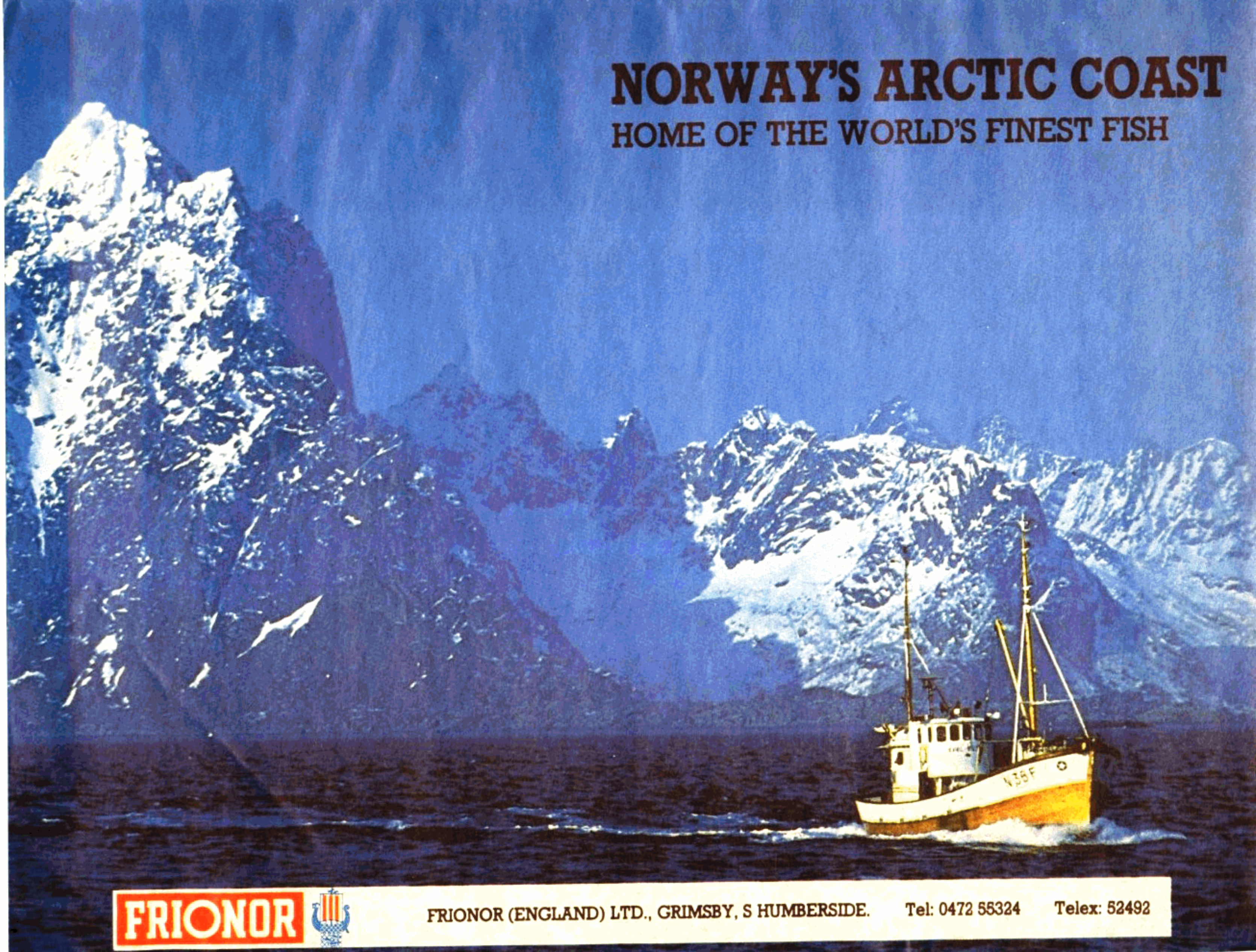
I repeatedly maintain that the food industry pays far too much attention to the definitions of and distinctions between the frozen and the chilled sectors. To quote KAE Developments director Brian Hendley, interviewed elsewhere in this book, "The perception of the consumer of processed foods is determined on completely different lines. The temperature at which a food product is bought does little to influence the shopper either way."

The appeal of food products is much less attributable to what has been done to the product in its processing than we would believe, because the consumer does not *know*. This does, however, allow preconceived ideas about the extent to which a product has been processed to influence buying patterns, and this is usually based on forms of packaging. In simple terms, can I see the contents, and if so, how closely do they resemble what I will actually eat? Hence the general theme described by Brian Hendley, that the consumer tends to think of quality or "realness" in the order of chilled, frozen, canned, and last *and* least, dehydrated.

The distinction between frozen and chilled and the effect upon their quality of their processing is blurred further, though. That is made clear by the quite massive incidence of people buying chilled products and freezing them at home. They are clearly not afraid of the idea of freezing, and crucially, they are not aware that quality would be assured much more effectively if they bought the same thing commercially and expertly *quick* frozen in the first place.

The beauty of the welter of new chilled lines is that if one wants to eat a product today or tomorrow, it offers all of the convenience of frozen without the need to freeze. Until people go back to shopping for food every day or every other day, however, the natural advantage of frozen remains intact. While (understandable) ignorance on the part of the consumer can be a problem, the assumption that the consumer is stupid is a greater one. The convenience boom is consumer led, and convenience is the key influence on food buying patterns. That is why frozen and chilled foods can and should continue to prosper alongside one another. The growth of chilled food is not as an evolutionary replacement for frozen, because the advantages of each are not the same. One technology takes over from another when it does the same job more easily or more cheaply.

Chilled foods *extend* the convenience available from the food processing industry, which has hitherto been embodied by frozen alone. Together they widen choice and widen the options of convenience. As such they form a single market; one of the most dynamic that British commerce has ever seen. ■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Foodfax Top 10s show the power of own-label

J Sainsbury and Marks & Spencer came out on top in the Fast Foodfax top 20 sweet and savoury products of 1986, emphasising the power of own-label.

Almost 700 new products were tested by consumer panels right across the country for the weekly Fast Foodfax Bulletin published by Cambridge Market Research. Panellists evaluated products on taste, texture, ease of use, packaging, value for money and intention to buy. Health was also considered.

Although 70 more branded products than own-label were evaluated in the savoury sector, own-label took 11 places in the Top 20, with eight of these coming in the first ten places. In the sweet sector the number of brands tested outnumbered own-label by just 17, but here brands dominated taking 14 of the Top 20 places.

Once again, value-added fish products were among the top scorers in the savoury sector alongside ready meals with chips and 'healthy' cottage cheese and salads. The demand for a wide range of products was also reflected in the sweet sector where the ubiquitous yogurt competed with a Cherry and Chocolate Gateau (with fresh cream), biscuits, pastries and cakes, a cheesecake and an ice-cream dessert.

TOP TEN FROZEN READY MEALS TESTED THROUGH FAST FOODFAX IN 1986

PRODUCT	PRODUCER/LABEL	WEIGHTED SCORE (out of 50)
Grill Steak & Chips	J. Sainsbury	42
Scampi and Chips	Marks & Spencer	42
Indian Chicken	Bejam	41
Menu Master – Roast Beef Platter	Bird's Eye Walls	40
Chicken Romanov	Thornhill's Country Produce	39
6 Haddock Steaks in Crumb	Bird's Eye Walls	38
Calorie Counted Menu Seafood Tagliarini	Marks & Spencer	37
Cod and Ratatouille Gratin	Marks & Spencer	36
Mama Mia's Lasagne	McVities Frozen Foods	36
Chinese Prawns	Ross Foods Ltd	35

January 1987

NB: In all tables, products with the same score have been separated according to their 'would buy' rating

TOP TEN CHILLED READY MEALS TESTED THROUGH FAST FOODFAX IN 1986

PRODUCT	PRODUCER/LABEL	WEIGHTED SCORE (out of 50)
2 Marinated Turkey Steaks	Marks & Spencer	38
Courgettes Provencale	J. Sainsbury	37
Chillfresh Cod & Prawn Crumble	Young's Chilled Foods	35
Tagliatelle with Bacon & Mushrooms	Katie's Kitchen	32
Chicken with Almonds	Waitrose	32
Bangers & Mash	Tesco	31
Spaghetti House Tortelloni Aurora	Cibitalia	31
Vegetable Lasagne	Waitrose	31
Chicken Breast en Croute	Dalgety Meat Products	30
Vegetable Bake	Asda Stores	30

January 1987

So, whether it's an own-label or branded product, sweet or savoury – what makes it a success or a failure with panellists?

"Our research shows that when it comes to the crunch consumers are demanding value for money and this applies to everyday items and luxury products alike," said CMR's managing director, John Cooke.

"Many items tested during the year were well liked by the panellists but if the price wasn't right they wouldn't be buying. This doesn't mean that only low cost items will sell but that the consumer must believe that the product, whatever the price, is worth the money.

"For example, rice and pasta based products often seem expensive when compared to the perceived cost of the basic ingredients; meat and fish based dishes which contain meagre amounts of either meat and fish, or products containing poor quality ingredients, such as 'fatty' meat, 'stringy' chicken – don't lead to repeat purchases." ▶

Taste is still more important than contents

▶ Feedback from consumers also showed that the trend towards 'natural', 'additive-free' and 'low fat' products was popular in principle but the end product has to appeal in its own right if it is to succeed. Some products which claimed to be 'healthy' were often described as bland or tasteless.

Although many consumers are more health conscious, Fast Foodfax results indicate there is still a demand for luxury products containing rich ingredients such as fresh cream and butter. If consumers are going to treat themselves and their families they want quality – they want the chocolate to taste like chocolate, and a cream sauce to taste creamy.

Numerous ethnic products were tested during the year and many were met with a mixed response. Bejam's Indian Chicken and Chicken Romanov from Thornhills Country Produce made the top 20, but several others were awarded very low scores.

Summing up, John Cooke said: 'Our research shows that there is room in the market for a wide range of products but, whether it's a cooking aid or a ready meal, a 'healthy' snack or a 'naughty' treat, the message from our food panellists is loud and clear – they must get value for money if they are going to buy." ▶

Hostess — ice cream among gateaux at No 2

TOP CHILLED DELICATESSEN TESTED THROUGH FAST FOODFAX IN 1986

PRODUCT	*PRODUCER/LABEL*	*WEIGHTED SCORE (out of 50)*
Spicy Prawn Cocktail	Marks & Spencer	41
Chicken Liver Pâté	Marks & Spencer	40
Pâté Selection	Marks & Spencer	39
Wild Scottish Garlic & Brandy Pâté	Castle Maclellan Foods Ltd	38
Low Fat Bacon & Liver Pâté	J. Sainsbury	36
6 Vegetable Samosas	Marks & Spencer	36
10 Bacon Fingers	Danepak	35
Low Fat Liver Pâté	J. Sainsbury	34
16 Mussels with Garlic	Marks & Spencer	34
Polony Slicing Sausage	Mattessons Meats	34

TOP TEN FROZEN SAVOURY PRODUCTS IN 1986

PRODUCT	*PRODUCER/LABEL*	*WEIGHTED SCORE (out of 50)*
6 Skinless Haddock Fillets in Breadcrumbs	Marks & Spencer	45
Cod Fillets in Crispy Natural Crumb	Ross Foods	41
4 Cheese Burgers	Iceland Frozen Foods	38
Baby Bakers	McCain Foods	38
4 Cod Steaks in Parsley Sauce	Asda	38
Rolled Plaice	Fine Fare	38
Minestrone Soup	Bejam	37
2 Cod Fillets in Oven Crisp Crumb	Marks & Spencer	37
6 Chicken & Ham Crusty Pies	Bejam	37
Vegetable Rice Spanish Style	Bonduelle	37

TOP SWEET FROZEN FOODS IN 1986

PRODUCT	*PRODUCER/LABEL*	*WEIGHTED SCORE (out of 50)*
Cherry & Chocolate Gateau	McVities	46
Hostess	Lyons Maid	46
Pecan Nut Danish Pastry	Kitchens of Sara Lee	44
Apple Danish Bar	Kitchens of Sara Lee	44
Deep & Fruity Blackcurrant Cheesecake	Kitchens of Sara Lee	44
4 Fruity Puffs	Tiffany Foods	43
Tropical Fruit Dessert	Young's Devonshire Foods	43
Heinzel's Party Size Chocolate Fudge Gateau	Heinzel	42
Choux Pastry	Bejam	41
Soft White Icecream	Bejam	40

St Michael divides the pastry prizes with Pork Farms

Cambridge Market Research Ltd
3a Market Hill
Saffron Walden
Essex CB10 1HQ
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Pork Farms' Floracrust — three entries among the M&S domination

TOP TEN CHILLED SAVOURY PASTRY PRODUCTS TESTED THROUGH FAST FOODFAX IN 1986

PRODUCT	PRODUCER/LABEL	WEIGHTED SCORE (out of 50)
Calorie Counted Quiche Chicken & Watercress	Marks & Spencer	38
Ploughman's Pasty	Marks & Spencer	36
Pork Farms Floracrust Vegetable Pastie	Pork Farms	36
Potato, Bacon & Onion Flan	Marks & Spencer	36
2 Mushroom, Onion and Emmental Tartlets	Marks & Spencer	34
Baked Chicken, Mushroom & Bacon Flan	Marks & Spencer	33
Tuna & Tomato Quiche	Marks & Spencer	33
2 Pork Farms Floracrust Pork Pies	Pork Farms	32
Garden Vegetable Pie	Marks & Spencer	32
Chunky Vegetable Pie	Pork Farms	30

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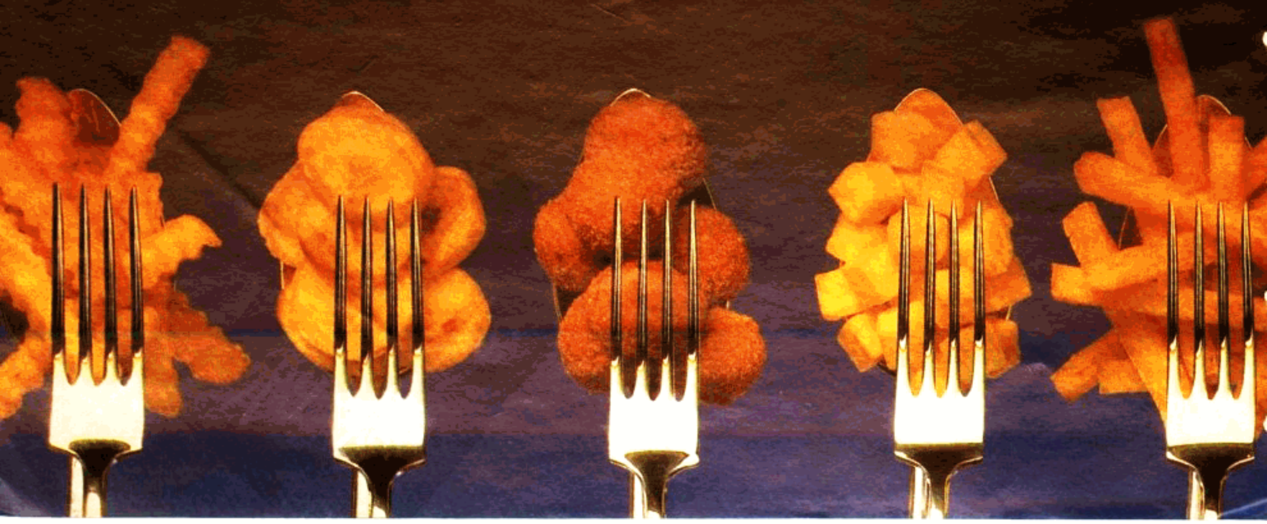

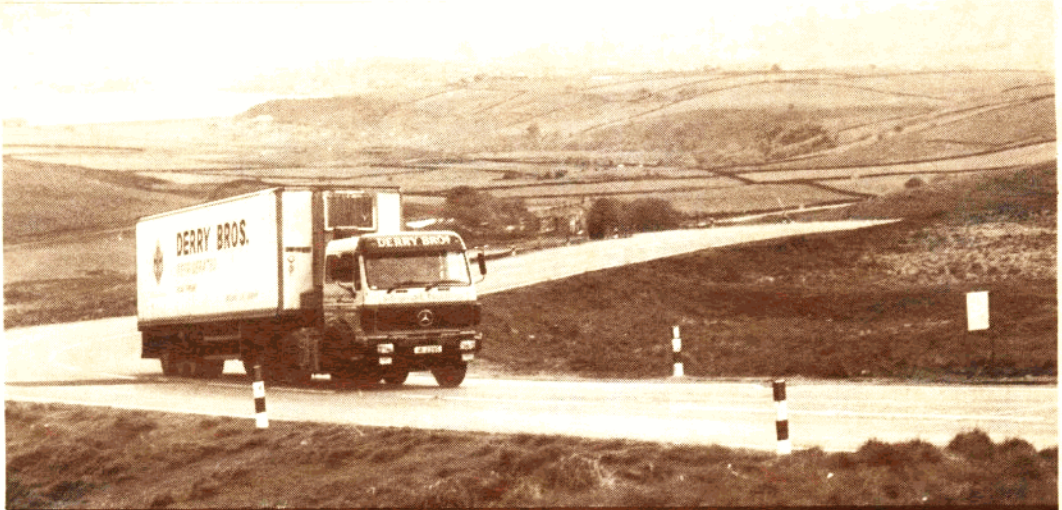

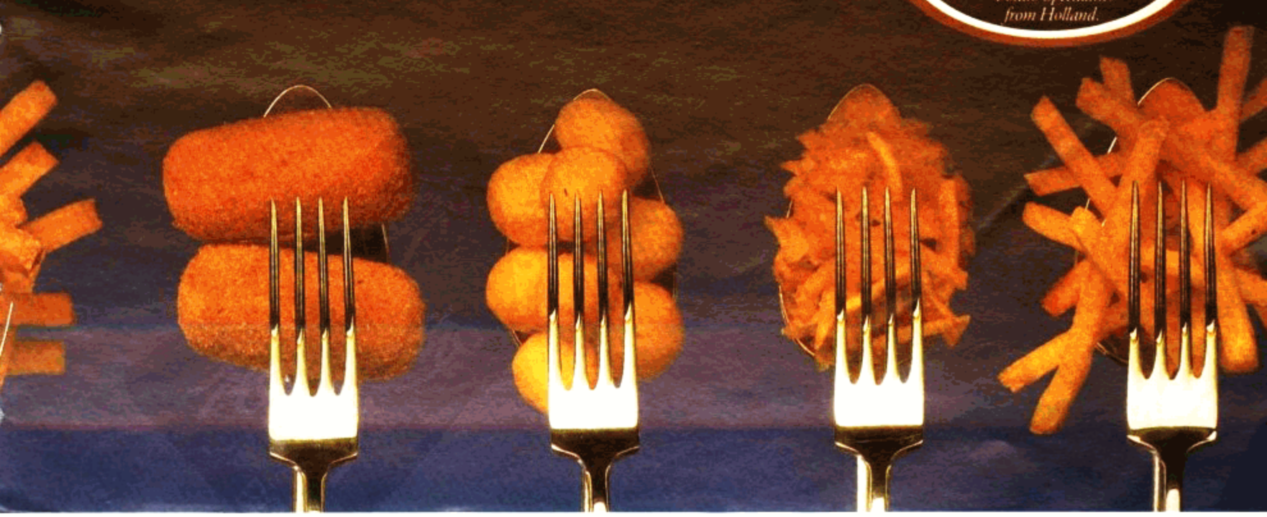

FROZEN AND CHILLED FOODS — FRIENDS OR FOES?

New product developer BRIAN HENDLEY talks to DAVID DAVIES about the consumer's view of frozen and chilled foods, and their distinctions

Probably the two most common talking points in the food industry at any given time, notwithstanding personnel moves, are new product developments and the latest company acquisitions. Coming up with the right product for the right market at the right time is often attributed by those who don't know to luck, and when one company takes over another many people believe the decision is made according to the going price of the acquired company.

The thought processes behind both phenomena go much further than this, however, and often they go beyond the walls of the instigating company's offices.

"The usual pattern is that a company, in food or elsewhere, decides that the time is right to make an acquisition, without knowing who or what to acquire. That's when they come to us, and we find a company which is in a position to be taken over and which fits in with the nature and activities, and forward planning, of our client."

These are the words of Brian Hendley, and the "we" to which he refers is KAE Developments, the product development and acquisition consultant of which he is a director. Through his work with food companies (his own background is in the technical aspects of food processing including five years with Young's Seafoods) he was able to throw light not only on the role that companies like his can play in the frozen food industry, but also on the current state of the industry and the continuing debate on frozen in relation to chilled.

In these pages we have over the last two years or so been saying that frozen manufacturers are far too worried about chilled, chiefly because the differentiation between the two is made much more clearly in the minds of people who work in the industry than it is, or ever will be, in the mind of the consumer.

"The perception of the consumer of processed foods is determined on completely different lines," said Brian Hendley. "The temperature at which a food product is bought does little to influence the shopper either way. What *does* influence her, and it usually is still 'her', is how processed, or 'mucked about' it appears to be. For that reason, the usual league table of food forms in terms of perceived quality is chilled, followed by frozen, followed by canned, followed by dehydrated.

"As always, there are exceptions, which exist invariably because there is no direct alternative. Yogurt, for instance, is perceived as being good despite being heavily processed, because there is no 'less processed' alternative form. The same applies to baked beans and to canned soup, to which the alternative is the more processed dehydrated packet soup. Canned vegetables, on the other hand, have lost out to the clearly less 'mucked about' frozen or fresh."

> **'The temperature at which a food product is bought does little to influence the shopper either way'**

Another aspect of the frozen and chilled debate put into perspective by Mr Hendley is the size of the chilled market which frozen manufacturers see as a threat. So many of the products which are included when the chilled market is assessed in billions have been around for years, since before anyone talked about a chilled market. They are products, like cheese, milk, yogurt, coleslaw and so on, which were not designed as chilled specifically, to offer advantages by being chilled, but which were perishables kept in good condition by chilled temperatures when the necessary technology came along.

So what does that leave as a new chilled food market? Brian Hendley believes that that basically leaves ready meals – a market which he puts at around £150 million (or roughly one tenth of the size of the frozen food market) and he adds, crucially, that Marks & Spencer represents 80 per cent of that £150 million.

If chilled foods threaten frozen, then, the industry needs only to address itself to M&S. But surely not, as that is a habit which has done the retail trade no good whatsoever. Marks & Spencer is a unique phenomenon, inimitable not least because its type of success can only really be done once.

Brian Hendley does not think there is a need to fear M&S, though. In fact he believes that the success of St Michael chilled meals at very high prices has actually created potential for much more growth in the *frozen* ready meal market.

"Chilling does not present tremendous product advantages as a process, because it does not require less processing than frozen and you still have a fragile and relatively perishable product. It is Marks & Spencer which offers the advantage, because of its complete control of the disciplines of chilled foods, from material sourcing, through manufacture, distribution, and temperature control to presentation in its stores. M&S practices ensure that the product bought at the checkout is perfect."

In the frozen sector, retail pressure on price for a given required ready meal to serve two determine that manufacturers are much more limited in what they can achieve. A supplier to M&S in the situation described by Brian Hendley can work to much higher end price margins, because if the product is right M&S can sell it at that price.

"My theory," he said, "is that frozen ready meal sales, and quality, have increased because the consumer has had good experiences with M&S chilled meals. Because there is not this clear public perception that frozen and chilled are markedly different, the consumer takes on the general idea that 'ready meals from supermarkets' are good, and goes on to try frozen ones. As sales of frozen increase, higher margins ►

— FRIENDS OR FOES?

can be charged and then more can be spent on improving and varying product ranges. Frozen food therefore goes from being cheap and cheerful to being interesting, of good quality, and more expensive.

"Convenience is still the natural advantage of frozen foods, and this too has increased with the birth of microwaveable recipes and ovenable and microwaveable containers. However good chilled products are, they will still have to be bought every other day or so, for use today or tomorrow. While frozen food is rarely bought for use over the next three or more months as it used to be, it is still bought for use at some time during the next week or fortnight."

Another possible advantage not mentioned by Mr Hendley occurs here. The alternative to buying chilled meals every other day is to buy them and then freeze them at home. Slow freezing at home renders the quality of the meals inferior to those which have been commercially quick frozen, thus promoting frozen products. Better still, it would be good to see some effective communication to convey to the consumer that it is much better to buy an expertly frozen product than to adulterate a chilled product by freezing it at home.

The best way for individual companies to exploit this potential must be to develop products which sell not only themselves but also the concept and image of frozen foods as a whole. This is precisely what KAE Developments aims to do in conjunction with frozen food manufacturing clients.

"Our involvement is essentially marketing based," said Brian Hendley, "although my own technical background comes into play when I work in conjunction with food technologists to actually put marketing ideas into practice in devising new products.

"The spark comes usually from a basic product idea – something different, something that the market seems to be ready for, or perhaps something which fulfils a particular consumer requirement in a way which no existing product does. Market research might then suggest that the product needs to be changed in some way to meet the requirements of the slot originally imagined for it, or that the product is right but might be best aimed at a slightly different area of usage."

Whatever route the development of a new product might take, KAE can come in from scratch, before there is even the germ of an idea, or it might come in the middle, in order to clear a mental log jam in a client's own development department.

With or without the help of KAE, it might be an idea for frozen food manufacturers to reconsider current thinking on the market. Discussion at the moment points at a slowing down of frozen food market growth, probably missing out on the hitherto touted projection of £2 billion by 1990.

Brian Hendley's reaction would have to be along the lines of "not necessarily".

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