

CRISPS, SAVOURY SNACKS AND NUTS – UK – 2024

New flavours and non-HFSS activity helped support sales amid cost of living pressures, with better-for-you products and nuts offering further growth potential.



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Crisps, Savoury Snacks And Nuts - UK - 2024

This report looks at the following areas:

- Performance of the market and the impact of the rising cost of living, including changes in the frequency of eating crisps, savoury snacks and nuts
- Key trends in recent launch activity and future product development opportunities
- Most important occasions crisps, savoury snacks and nuts are being purchased for
- Impact of HFSS product location restrictions and better-for-you attributes most likely to influence product choice
- Consumer behaviours and attitudes related to the eating and buying of crisps, savoury snacks and nuts, including the appeal of more flavour choice and different base ingredients
- Usage of selected brands and attitudes towards them



New flavours and non-HFSS activity helped support sales amid cost of living pressures, with better-for-you products and nuts offering further growth potential.

Overview

Volume sales of crisps, savoury snacks and nuts have held up well despite cost of living pressures. The small role of these snacks in household budgets, the [scope for trading down](#) and leading players' NPD look to have shielded them from cutbacks. The eating of these snacks is underpinned by their links to many different consumption occasions, the most important being [evening snacking](#), followed by daytime snacking and having with lunch.

Ultra-processed foods (UPFs) are the latest health foe in the limelight, and [68%](#) of people who eat crisps, savoury snacks or nuts report limiting their eating of highly processed savoury snacks. While this finding should be taken with some caveats, it nonetheless suggests that

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further coverage around UPFs stands to put pressure on certain savoury snacks, especially tortilla chips and 'other' shaped crisp-style snacks.

Healthier base ingredients such as chickpeas and lentils have forged a growing foothold in savoury snacks launches in recent years. These provide a promising area for brands to mine further, given that 61% of category users enjoy trying snacks offering variety in this aspect. Of them, 33% would be swayed to choose a product if it was high in protein and 30% if it was high in fibre. This points to base ingredients that are protein- or fibre-rich in particular holding promise.

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Report Content

EXECUTIVE SUMMARY

Opportunities for the crisps, savoury snacks and nuts market

- Opportunity for further growth in nuts
- Promoting better-for-you attributes has strong potential to appeal
- Keep targeting evening snacking occasions

Market dynamics and outlook

- Market predictions
- Strong 2023 sales performance despite cost of living pressures
- Sales forecast to exceed £7 billion by 2028
- Return to volume growth and lower value sales growth as inflation eases
- Higher prices boost value sales in all segments
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 - Graph 2: leading brands' sales in the crisps market, 2021-23
- Other bagged savoury snacks is a highly fragmented segment
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Market forecast

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- Butterkist maintains top position in popcorn
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- Peperami and Fridge Raiders dominate meat snack sales

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WHAT CONSUMERS WANT AND WHY

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- At-home social gatherings pose an opportunity for premium snacks
- Lunch remains a key occasion for crisps/crisp-style snacks
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Healthier product attributes influencing choice

- Strong interest in better-for-you attributes in crisps, savoury snacks and nuts
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- Big recent push to launch non-HFSS snacks
- Promoting one or a few healthier attributes has strong potential to appeal
- Snack brands mainly highlight one better-for-you attribute
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- Less salt claims will also appeal
- Opportunity for nuts as base ingredient in snacks
- Flavour innovation another way to drive interest in nuts
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- On-pack messaging can drive connotations with simple processes

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- Partnerships/collaborations a feature of 2023 flavour innovation
- Brand collaborations a big focus for Walkers snacks launches
- Iceland includes crisps and tortilla chips under its exclusive brands
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- Tyrrells, Kettle and popchips all tap interest in hot and spicy flavours
- New hot and spicy flavours added by top brands in meat snacks
- NPD brings more flavour choice to nuts
- Strong interest in more choice in of popcorn flavours
- Sweet flavours dominate in popcorn
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- KP Snacks' non-HFSS launch push continues
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- High/added protein claims continue to feature in NPD
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- High-protein messages continue to feature on meat snacks
- Walkers launches vegan crisps for January 2024
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- Pringles in recyclable paper tubes launched into Tesco

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- Walkers champions sustainably grown British potatoes and taste
- Doritos' Burger King Flame Grilled Whopper flavour gets TV advert
- Doritos launches 'Doritos Silent' experience
- Tyrrells and popchips lead KP Snacks advertising
- 'A Taste you can't let go' advert shows Pringles irresistible and fun side
- Pringles Multigrain celebrate the Wonderfully Different

BRAND RESEARCH

- Walkers Crisps the most trusted brand
- Pringles has the most differentiation
- Seven in 10 people ate Walkers Crisps in the last year
- Pringles and Doritos have a younger user base than other brands
 - Graph 51: usage of selected brands present in the crisps, savoury snacks and nuts in the last 12 months, by age, 2024
- Correspondence maps
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- Walkers, Pringles and Doritos enjoy strongest image as fun
- Walkers Crisps and Pringles seen as the most delicious brands
- KP Nuts and Tyrrells seen more widely as natural than other brands

APPENDIX

Market segmentation

- Retail value sales by segment
- Retail volume sales by segment
- Nuts segmentation by volume

Market share

- Crisps brand value sales
- Crisps brand volume sales
- Crisps manufacturer value shares
- Crisps manufacturer volume shares
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- Potato-based, baked and other snacks brand volume shares
- Potato-based, baked and other snacks manufacturer value shares
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Launch activity and innovation

- Share of new launches by sub-category
- Share of new launches by claim
- Share of new launches by claim (continued)

Advertising and marketing activity

- TV dominates crisps, savoury snacks and nuts advertising

Market forecast data and methodology

- Value market size and forecast
- Volume market size and forecast
- Market forecast and prediction intervals (value)
- Market forecast and prediction intervals (volume)
- Forecast methodology

Report scope and definitions

- Market definition
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- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage

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