

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

Key issues covered in this Report

- Overview

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
 - Graph 1: retail value sales of crisps, savoury snacks and nuts, by segment, 2021-23
- Walkers' brands dominate crisps
 - Graph 2: leading brands' sales in the crisps market, 2021-23
- Other bagged savoury snacks is a highly fragmented segment
 - Graph 3: leading brands' sales in the other bagged savoury snacks market, 2021-23
- Rate of inflation coming down but UK economy in recession in second half of 2023
- Flurry of non-HFSS launches in response to product location restrictions
- Snacks feature in most people's daily diets
 - Graph 4: frequency of snacking, 2020-23
- Population growth will support demand for crisps, savoury snacks and nuts
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 - Graph 6: frequency of eating crisps, savoury snacks and nuts, 2023
- Four in five shop from the crisps and snacks main aisle
 - Graph 7: where shoppers select crisps, savoury snacks and nuts selected in store, 2023
- Evening snacking most important occasion for crisps, nuts and popcorn
 - Graph 8: occasions crisps/crisp-style snacks, nuts and popcorn bought for, 2023

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- Range of better-for-you attributes would encourage buying
 - Graph 9: better-for-you attributes encouraging buying of one product over another in crisps, savoury snacks and nuts, 2023
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Innovation and marketing

- Partnerships/collaborations a feature of 2023 flavour innovation
- Hot and spicy flavours continue to feature in NPD
- HFSS regulations drive healthier product launches
- Walkers champions British potatoes and sustainable farming

MARKET DYNAMICS

Market size

- Resilient volume sales despite income squeeze
 - Graph 11: retail volume sales of crisps, savoury snacks and nuts, 2018-23
- Higher prices drive double-digit growth in value sales
 - Graph 12: retail value sales of crisps, savoury snacks and nuts, 2018-23
- Half of buyers would sooner cut back on sweet treats

Market forecast

- Volume sales forecast to return to slow growth
- Value sales growth to slow down with lower inflation
- Sales forecast to exceed £7 billion by 2028
- Real wage growth and health considerations will affect spending
- Last income squeeze saw sales of savoury snacks hold up well
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Market segmentation

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Market share

- Walkers' brands dominate crisps
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 - Graph 16: leading brands' volume sales in the crisps market, 2021-23

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- KP Nuts maintains share in own-label dominated segment
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- Butterkist maintains top position in popcorn
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- Pepperami and Fridge Raiders dominate meat snack sales

Macro-economic factors

- The UK economy moved into a shallow recession in the second half of 2023
 - Graph 20: GDP, 2021-23
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 - Graph 21: CPI inflation rate, 2021-23
- Double-digit rises crisps prices since summer 2022
 - Graph 22: consumer price inflation for all food, crisps, and fruit and nuts, 2022-23
- Interest rates will rise in importance over the remainder of 2023 and into 2024
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 - Graph 23: "Have you been affected by any of these issues over the last two months? Please select all that apply.", 2023
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 - Graph 24: the financial wellbeing index, 2016-23
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Social, environmental and legal factors

- Snacks feature in most people's daily diets
 - Graph 26: frequency of snacking, 2020-23
- Government measures on HFSS food and drink slow to roll out
- Crisps and savoury snacks fall within HFSS
- HFSS is defined by nutrient profile
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- Strong consumer interest in healthy eating
 - Graph 27: how often people try to eat healthily, 2018-22
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 - Graph 28: trends in the age structure of the UK population, 2018-28
- Mixed effects from changes in size of different age groups

WHAT CONSUMERS WANT AND WHY

Usage of crisps, savoury snacks and nuts

- Near-universal eating of crisps, savoury snacks and nuts continues
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 - Graph 29: types of crisps/crisp-style snacks eaten in the last three months, 2019-23
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 - Graph 30: types of nuts eaten in the last three months, 2019-23
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 - Graph 32: frequency of eating crisps, savoury snacks and nuts, 2023
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 - Graph 35: where shoppers select crisps, savoury snacks and nuts selected in store, 2023
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- Promotions aisles an important driver of sales

Crisps, savoury snacks and nuts occasions

- Evening snacking most important occasion for crisps, nuts and popcorn
 - Graph 37: occasions crisps/crisp-style snacks, nuts and popcorn bought for, 2023
- Crisps/crisp-style snacks appeal widely as an evening snack
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- 'Big nights in' warrant snack brands' attention
 - Graph 39: have 'big night in' with people that they live with instead of going out, 2023

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- At-home social gatherings pose an opportunity for premium snacks
- Lunch remains a key occasion for crisps/crisp-style snacks
- Long-standing role for crisps as a component in meal deals
- Walkers reignites crisp in or out of sandwich debate
- Nuts and popcorn lag behind in the lunch occasion
- Strong demand for more choice of flavours in popcorn
 - Graph 40: "More choice of popcorn flavours would be appealing to me", by age, 2023
- Savoury flavours opportunity in popcorn
- Range of savoury popcorn flavours seen internationally
- Combine interesting flavours with highlighting nutritional benefits
- Income squeeze supports packed lunches

Healthier product attributes influencing choice

- Strong interest in better-for-you attributes in crisps, savoury snacks and nuts
- Range of better-for-you attributes sought...
 - Graph 41: better-for-you attributes encouraging buying of one product over another in crisps, savoury snacks and nuts, 2023
- ...despite these snacks' role as treats
 - Graph 42: interested in any listed better-for-you attributes for crisps, savoury snacks and nuts, by age, 2023
- 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
- Interest in health claims extends to buying snacks as a treat
- Continue exploring healthier base ingredients
- Base ingredients that are high in fibre or protein continue to feature in savoury snack launches
- Younger consumers the main group for high-protein snacks to target
 - Graph 43: selected better-for-you attributes encouraging buying of one product over another in crisps, savoury snacks and nuts, by age, 2023

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- Further growth potential for nuts
- Vast majority of people like nuts
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- Nuts should look to further benefit from not being under HFSS restrictions
- Flagging up of fibre and protein will help encourage more buying of nuts
- Less salt claims will also appeal
- Opportunity for nuts as base ingredient in snacks
- Flavour innovation another way to drive interest in nuts
- Media spotlight on ultra-processed foods poses a threat to crisps and savoury snacks

- Nearly seven in 10 consumers limit their eating of highly processed savoury snacks
- Efforts to limit highly-processed variants hit shaped savoury snacks
 - Graph 45: usage of selected crisps, savoury snacks and nuts, by whether respondents limit eating highly processed savoury snacks, 2023
- Clean label and natural positionings offer scope to combat processed image
- Highlighting 'nothing artificial' can help imply a less processed proposition
- Showcase manufacturing process to ease consumer concerns
- 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
- New flavours form a big part of seasonal, premium and limited edition launches
 - Graph 46: proportion of new launches in the crisps, savoury snacks and nuts market making seasonal, premium and limited edition claims, 2019-23
- Christmas flavour launches dominate seasonal activity
- Premium own-label explores international dishes to serves up new flavours
- Hot and spicy flavours continue to feature in NPD
- 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
- Brand collaborations, extensions and dessert flavours feature in popcorn NPD
- HFSS regulations drive healthier product launches
- KP Snacks' non-HFSS launch push continues
- Few launches make L/N/R claims
 - Graph 47: proportion of new launches in the crisps, savoury snacks and nuts market featuring low/no/reduced fat, saturated fat, sodium and calorie claims, 2019-23
- Brands making use of a variety of levers to be non-HFSS
- Reduced fat claims seen on branded and own-label launches
- Being baked or popped also enables limited calories claims
- Less than 100 calories per pack claims feature on baked and popped snacks
- High/added fibre claims have increased

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- Graph 48: proportion of new launches in the crisps, savoury snacks and nuts market making high/added fibre and high/added protein claims, 2019-23

- High/added protein claims continue to feature in NPD
- Products with beans and peas push high-protein claims
- High-protein messages continue to feature on meat snacks
- Walkers launches vegan crisps for January 2024
- Steps towards more sustainable packaging continue
- Pringles in recyclable paper tubes launched into Tesco

Advertising and marketing activity

- Small increase in 2023 adspend on crisps, savoury snacks and nuts
 - Graph 49: above-the-line, online display and direct mail advertising expenditure on crisps, savoury snacks and nuts*, 2020-23
- Walkers dominates advertising spending
 - Graph 50: above-the-line, online display and direct mail advertising expenditure on crisps, savoury snacks and nuts*, by advertiser, 2020-23
- Walkers Crisps supported by £7 million in ad spend
- 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
- Value image is a key strength for Walkers Crisps
- Pringles is seen as the most innovative brand
- 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
- Potato-based, baked and other snacks brand value shares
- Potato-based, baked and other snacks brand volume shares
- Potato-based, baked and other snacks manufacturer value shares
- Potato-based, baked and other snacks manufacturer volume shares
- Nuts manufacturer value and volume shares
- Popcorn manufacturer value and volume shares
- Meat snacks manufacturer value and volume shares

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
- Market definition exclusions
- Abbreviations and terms

Methodology

- Consumer research methodology
- Nielsen Ad Intel coverage

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