

# SALTY SNACKS - GERMANY - 2020



Responding to emotional needs is relevant for salty snacks, especially in times of uncertainty and fear brought on by COVID-19.



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# Report Content

## EXECUTIVE SUMMARY

- Mintel's perspective

### Market context

- COVID-19 lockdown measures could benefit salty snacks, at least in the short term
- Salty snacks are widely popular in Germany, particularly among the youngest
- Salty snacks are widely popular in Germany, particularly among the youngest
- Continuously strong sales performance
- Healthiness battles with taste in food priorities, making NPD challenging

### Mintel predicts

- The future looks promising for salty snacks but population changes represent challenges
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- Retail sales of salty snacks projected to see healthy growth in the next five years
- COVID-19's impact on the category
- Snacking culture will benefit salty snacks over the next five years

### What consumers want, and why

- Consumers want: nutritious salty snacks
  - Graph 1: select attitudes towards salty snacks, December 2019
- Consumers want: locally produced salty snacks
  - Graph 2: "I would like to see more salty snacks made with ingredients that are local to the brand", by age, December 2019
- Consumers want: low-cost ways of boosting their mood
  - Graph 3: "Eating crisps/nuts/savoury snacks is a good low-cost way to boost your mood", by age, December 2019
- Consumers want: the option to customise their salty snacks
- Consumers want: the option to customise their salty snacks

### Opportunities

- Tap into the 'snackified' meal occasion with nutritionally balanced products
- Unlock opportunities of local sourcing beyond ingredient provenance
- Capitalise on the feelgood connotations of salty snacks
- Look to customisation to keep the young core users engaged...
- ...and to encourage uptake among older consumers
- ...and to encourage uptake among older consumers

### The competitive landscape

- Intersnacks and Lorenz Bahlse lead the salty snacks market
- Pfeifer & Langen (Intersnacks) leads salty snacks market by some distance
  - Graph 4: company retail market share of salty snacks, by value and volume, 2019
- Quick download resources

### THE IMPACT OF COVID-19

- COVID-19's impact on the broader category
- Market size & forecast following COVID-19 outbreak
- What COVID-19 will mean in the short, medium and long term for salty snacks
- Key shifts in consumer behaviours
- Key shifts in consumer behaviours
- How COVID-19 is impacting key consumer segments
- How COVID-19 is impacting key consumer segments
- Acknowledging threats...
- ...and focusing on opportunities
- The impact of COVID-19 on the marketing mix
- How a COVID-19 recession will reshape the industry
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### MARKET DRIVERS

- COVID-19 lockdown measures could boost sales of salty snacks, at least in the short term
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- 'Evening In' – an occasion that snacking brands must not miss
- Salty snacks brands can help make (lockdown) evenings in more special
- Modern lifestyles drive demand for snacking
- Out-of-home occasions are important for snackers...
  - Graph 5: where snacks are eaten, July 2019
- ...particularly for younger generations
  - Graph 6: snacking at out-of-home locations, by age, July 2019
- Mintel Trend: Transumers
- Salt, fat and sugar reduction targets set for processed food for 2025
- Mintel Trend: Supernanny State
- Germany plans to introduce Nutri-Score labeling system on a voluntary basis

- Consumers' contrasting priorities and government targets pose a real NPD challenge
- Limited willingness to change lifestyles to be healthier
  - Graph 7: healthy eating habits, by age group, Q4 2018
- Healthiness battles with taste in food priorities
  - Graph 8: "Taste is more important than health in my food choices", by age, December 2019
- Healthiness battles with taste in food priorities
  - Graph 9: selected factors considered most important when shopping for food, by age, December 2019
- Operators must respond to spotlight on packaging sustainability
- The government targets plastic packaging waste
- Population changes pose challenge to the salty snacks market
- Population changes pose challenge to the salty snacks market
  - Graph 10: population by age, 2014, 2019 and 2024
- Poor potato harvest affects crisp prices

## WHAT CONSUMERS WANT, AND WHY

### Types of salty snacks eaten

- Salty snacks are widely popular in Germany, particularly among the youngest
- Salty snacks are widely popular in Germany, particularly among the youngest
  - Graph 11: types of salty snacks eaten in the last three months (NET), December 2019
- Salty snacks are widely popular in Germany, particularly among the youngest
  - Graph 12: types of salty snacks eaten in the last three months (NET), by age group, December 2019
- Young people have the broadest salty snacks repertoires
- Young people have the broadest salty snacks repertoires
- Young people have the broadest salty snacks repertoires
  - Graph 13: repertoire of types of salty snacks eaten in the last three months, by age, December 2019
- Potato slice crisps enjoy greatest popularity
  - Graph 14: types of salty snacks eaten in the last three months, December 2019
- Crisps and crisp-style snacks by far the most popular
- Nuts appeal across all ages, delivering on both health and flavour
- Flavoured nuts are preferred over unflavoured varieties
- Flavoured nuts are preferred over unflavoured varieties
- Popcorn is a snack of the young
- One in three men aged 16-24 eat meat snacks
  - Graph 15: high protein content as the most important factor when looking for healthy foods, by age within gender, Q4 2018

### Frequency of eating salty snacks

- Nuts are eaten most frequently
  - Graph 16: frequency of eating salty snacks in the last three months, December 2019
- One in five eats nuts at least three times a week
- Usage frequency of crisps/crisp-style snacks lags behind that of nuts
- Usage frequency of crisps/crisp-style snacks lags behind that of nuts

### Most important factors when choosing crisps/crisp-style snacks

- Favourite flavour and brand prioritised over health-related factors
  - Graph 17: most important factors when choosing crisps/crisp-style snacks, December 2019
- Favourite flavour is the overriding priority for salty snack users
- Brand loyalty is not overly strong in crisps/crisp-style snacks
- People prioritise naturalness over healthiness
- People prioritise naturalness over healthiness
- All-natural formulations warrant more attention
- Health has relatively low priority when choosing crisps/crisp-style snacks
- Health has relatively low priority when choosing crisps/crisp-style snacks
- Better-for-you products must prove their worth in terms of taste
- Low fat is a key attribute people look for in healthier products
  - Graph 18: attributes looked for when choosing a healthier crisp/crisp-style snack, December 2019
- Low-fat is a key health cue
- Low-fat is a key health cue
- New types of snacks best placed to explore low-fat formulations
- Non-fried snacks need to be more vocal about their low-fat credentials
- Lower-salt products could help drive engagement among older consumers
- Positive nutrition has less impact than low/reduced propositions
- Alternative base ingredients hold potential for an all-round healthier snack

### Behaviours relating to salty snacks

- Local provenance chimes with majority of salty snack users
  - Graph 19: behaviours relating to salty snacks, December 2019
- Local ingredients resonate with one in two salty snack users
- Local sourcing can not only boost a premium, but also a socially responsible image
- Local sourcing can not only boost a premium, but also a socially responsible image
- Flavour customisation as a means to keep the young engaged
  - Graph 20: people who look for new foods/flavours to try all/most of the time, by age, December 2019
- Customisation could also be a way to tap into interest for lower-salt products
- High interest in seasonal themes not currently met

- Graph 21: consumer interest in novelty crisps/nuts/savoury snacks with seasonal themes, by age, December 2019
- UK brands offer inspiration for seasonal innovation

### Attitudes towards salty snacks

- Half of parents want healthier salty snacks for their children
  - Graph 22: attitudes towards salty snacks, December 2019
- Strong interest among parents for healthier salty snacks for kids
- Two in five users see salty snacks as mood-boosting
- Scope to further build on feelgood connotations
- Scope to further build on feelgood connotations
- High-protein snacks can have a role in filling nutritional gaps
- High-protein snacks can have a role in filling nutritional gaps
- A more rounded focus on nutrition can help tap meal replacement occasion
- Salty snacks play a key role for 'evening-in' occasion
- Pairings with drinks or dips can help salty snacks drive the 'evening-in' occasion
- Brands can more overtly target the occasion through NPD and TV sponsorships

## LAUNCH ACTIVITY AND INNOVATION

- Nuts' share of NPD bounces back after years of decline
  - Graph 23: top five categories in salty snacks NPD, 2015-19
- Aldi Nord adds value by highlighting nut provenance
- Nuts face competition from crunchy pulses and beans
- Potato-based snacks see a downturn in NPD as manufacturers look to alternative bases
- Alternative base ingredients can offer a health halo
- Rice snacks step up their game in the health and flavour arena
- The 'clean label' trend has major impact on salty snacks NPD
  - Graph 24: leading claims in salty snacks NPD, 2015 vs 2019
- Health is another key theme, with positive nutrition claims growing in importance
- Health is another key theme, with positive nutrition claims growing in importance
  - Graph 25: selected health-related claims in salty snacks NPD, 2015 vs 2019
- Growth in vegan NPD increases presence of plant proteins
  - Graph 26: selected protein ingredients\* in high/added protein snack launches, 2015-19
- Plant proteins can boost health credentials of salty snacks
- Growth in high fibre claims, but brands are not currently exploring its link to gut health
- Seeberger puts health benefits front-of-pack as part of packaging relaunch
- Scope for more variety in vegetable snacks
  - Graph 27: select vegetable ingredients used in vegetable snacks, 2015-19
- Snacks can benefit from the vegetable health halo



- Many meat snacks target the on-the-go occasion...
- ...while others focus on ingredient quality
- Sustainability is another key theme for meat snacks, mostly explored by smaller challenger brands
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- Sustainability is another key theme for meat snacks, mostly explored by smaller challenger brands
- Flavours remain largely traditional but more exotic ones start to gain ground
  - Graph 28: top five flavours (incl. blends) of new salty snack launches, 2015-19
- Leading players explore exotic flavours...
- ...and promise intense flavour experiences
- Indulgent sweet flavours on the rise in popcorn
- Ethical commitment warrants more attention

### Advertising and marketing activity

- Crunchips continues to be all about fun, adventure and togetherness
- Amidst COVID-19 breakout, Crunchips brings street food festival vibes to people's homes
- funny-frisch's 'Insider Chip of the Year' campaign crowdsources ideas for flavour innovation
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- funny-frisch's 'Insider-Chip of the Year' campaign
- Pringles continues its engagement with the gaming world
- Lay's builds associations with specific occasions...
- ...and continues its sponsorship of the UEFA Champions League

## MARKET SHARE

- Intersnacks takes strong lead in German salty snacks market

### Retail market share of salty snacks, by value, 2018-19

- Brands continue to dominate value sales with a 55% share in 2019...

### Retail market share of salty snacks, by volume, 2018-19

- ...but private label holds the lion's share in term of volume sales

## MARKET SEGMENTATION, SIZE AND FORECAST

### Forecasting during the COVID-19 pandemic

- Note on forecast in response to COVID-19
- COVID-19's impact on the category
- Healthy innovation has supported growth over 2014-19
- Further volume and value growth ahead
- Salty snacks values projected to grow by 24% in the next five years...

- ...while volumes are forecast to grow by 13% by 2024

### **Retail sales of salty snacks, by segment, 2017-19**

- Nuts are main driver of sales growth; crisps lose out
- Nuts are main driver behind growth of salty snacks sales

## **APPENDIX**

### **Note on COVID-19**

- COVID-19's impact on salty snacks and German consumer behaviour

### **Appendix - products covered, abbreviations and consumer research methodology**

- Products covered in this Report
- Abbreviations
- Consumer research methodology

### **Appendix - market size and forecast**

- Market size and forecast - value
- Market size and forecast - volume



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