

SALTY SNACKS – GERMANY – 2022

A continued focus on health benefits and new flavour innovation, as well as at-home snacking formats, will be important in driving long-term growth for salty snacks.



Valentin Thies, Associate Director, Food & Drink



Salty Snacks – Germany – 2022

This report looks at the following areas:

- The impact of COVID-19 and rising inflation on the salty snacks market
- Salty snack usage and how it has changed since 2019
- Important attributes for a salty snack to be considered healthy, including all-natural ingredients and the importance of 'low-in' claims
- Attitudes towards and behaviours related to salty snacks
- How launch activity reflects consumer demand, especially looking at nuts' health halo and popcorn innovation



A continued focus on health benefits and new flavour innovation, as well as at-home snacking formats, will be important in driving long-term growth for salty snacks.

Overview

For 48% of German snack eaters, the two most important attributes for a salty snack to be considered healthy are all-natural ingredients and no artificial flavours. Activity in this space remains limited, with all-natural claims featuring on just 3% of new launches. Salty snack brands can address the wider 'clean eating' trend by innovating with eg whole vegetables or freeze-dried ingredients that retain natural nutrients.

As an opportunity, there is room for more indulgent products that don't have to be healthy. Salty snack brands can strive for higher quality using premium and natural ingredients for indulgent me-time moments at home or with guests to share. Indeed, 58% of snack eaters want a snack to indulge in for an evening/night-time snack.

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As inflation is currently high, with experts predicting a further increase over the coming months, and consumers' incomes squeezed, we can see **private label salty snack brands gaining further share of NPD** in the near future.

This threatens the salty snack market, with consumers already noticing rising prices; **67% of Germans** say they have been affected by increases in food and drink prices (in January 2022). If inflation continues to rise, financially vulnerable consumers will be looking for the least expensive brand or cutting back on volume.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for salty snacks

Market context

- Rising costs affecting all German consumers
- More time at home as a result of COVID-19 fuels salty snack retail sales
- Almost nine in 10 Germans eat salty snacks
 - Graph 1: types of salty snacks eaten, 2021 vs 2019

Mintel predicts

- Market size and forecast
- Long-term growth of salty snack retail sales is driven by the ongoing popularity of snacking
- Increased salty snacking consumption at home

Opportunities

- Promote new flavours and mixes of salty snacks
- Offer more natural salty snacks with BFY credentials
- Innovate more around resealable packaging and at-home formats
- Keep salty snack users engaged with flavour customisation

The competitive landscape

- Brands maintain the majority share of salty snack value sales, but private labels win on volume sales
 - Graph 2: company retail market share of snacks, by value and volume, 2021
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 3: key economic data, in real terms, 2019-23
- Rising inflation squeezes household incomes
- German Government encourages snack reformulations and transparent labelling
- Germans' demand for healthier and more better-for-you snacks
- The COVID-19 outbreak has propelled snacking in Germany, especially among the 16-34s

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- At-home occasion gains further importance for snacks
- At home occasion gains further importance for snacks
 - Graph 4: where snacks are eaten, 2021 vs 2019

WHAT CONSUMERS WANT AND WHY

Usage of salty snacks

- Almost nine in 10 Germans eat salty snacks
 - Graph 5: types of salty snacks eaten, 2021 vs 2019
- A third of Germans eat up to two types of salty snacks only
 - Graph 6: repertoire of salty snacks eaten, by age, 2021
- Potato slice crisps and roasted nuts are favourite salty snacks of Germans
 - Graph 7: types of salty snacks eaten, 2021 vs 2019
- Nuts benefit from a health halo
- Popcorn of particular appeal to 16-24s
- Nuts are the most frequently eaten salty snack
 - Graph 8: frequency of eating different types of salty snacks, 2021

Attributes looked for in salty snacks by occasion

- The snack occasion makes a big difference among various attributes
 - Graph 9: attributes looked for in a salty snack by occasion, 2021
- Indulgence matters most for evening snacks and snacks for guests
 - Graph 10: importance of 'something to indulge in' for a salty snack, by occasion, 2021
- Exciting flavours and eye-catching packaging for the sharing occasion
- Tap into work/studying occasions with nutritious and energy-boosting snacks

Important attributes for a salty snack to be considered healthy

- Salty snack brands can combine 'low in' and positive nutrition messages
 - Graph 11: attributes that are important for a savoury snack to be considered healthy, 2021
- Opportunity for nutrient-dense BFY options
- Naturalness strongly associated with healthiness
- Address the clean and healthy eating trend in the salty snack category
- 'Low in' claims chime more widely than positive nutrition claims
- Ongoing opportunities for innovative 'low in' products
- Healthy primary ingredients benefitting from a health halo warrant more attention
- Scope to further explore new base ingredients

Behaviours related to crisps, nuts and savoury snacks

- Great openness to new flavours, formats and mixes is promising for continued innovation

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- Graph 12: behaviours related to eating and buying salty snacks, 2021

- Strong interest in trying new flavours of salty snacks
- Herbal, spicy and smoky flavours appeal in savoury foods
- Involve consumers in the choice of new flavours
- Keep users engaged with flavour customisation at home
- High interest in a mixture of textures and sweet & salty combinations
- Sweet & salty snacking combinations remain niche in salty snacks NPD
- International inspiration: brands experiment with a potpourri of textures

Attitudes towards salty snacks

- Three in four Germans want more salty snacks with resealable packaging
 - Graph 13: attitudes towards salty snacks, 2021
- Consumers want salty snack formats that allow for repeat use
- Locally sourced ingredients are an untapped opportunity
- funny-frisch supports regional farmers and fights food waste
- Tap into consumers' willingness to pay more for salty snacks that help support farmers

LAUNCH ACTIVITY AND INNOVATION

- Nuts' share of NPD jumps to a high
 - Graph 14: top ten sub-categories in salty snacks NPD, 2017 vs 2021
- Nut brands capitalise on nuts' health halo
- Bean-based snacks target health-conscious consumers
- Popcorn innovation looks to appeal to adventurous younger consumers
- Brands take overall lead of NPD activity
 - Graph 15: salty snacks NPD, by top 10 ultimate companies, 2021
- The vegan trend is also evident in salty snacks NPD
 - Graph 16: leading claims in salty snacks NPD, 2017 vs 2021
- Vegan meat snacks step up their game
- Scope for more flavour innovation
 - Graph 17: salty snacks NPD, by flavours (inc. blends), 2017 vs 2021
- Leading players dial up flavour intensity
- Gourmet flavours premiumise the salty snacks category
- Ethical and environmental claims grow strongly
- Snack brands respond to consumer interest in environmentally friendly packaging
- Rettergut launches tortilla crisps made with upcycled tortilla bread, actively reducing food waste

Advertising and marketing activity

- A lifestyle insight: social media platforms help to reach young salty snackers

- Graph 18: top five social media platforms used at least once a week, by generation, 2021

- ültje taps into the homecooking trend, offering recipe inspirations on social media
- Flavour intensity and fun at the core of Chio's latest ad

MARKET SHARE

- Brands maintain the majority market share of salty snacks

Retail market share of salty snacks, by value, 2020-21

- Brands continue to dominate value sales with an almost 60% share in 2021...

Retail market share of salty snacks, by volume, 2020-21

- ...but private label holds half in terms of volume sales

MARKET SIZE, SEGMENTATION AND FORECAST

Retail sales of salty snacks, by segment, 2019-21

- Salty snack retail market grew by 5% in value and 1% in volume terms over 2020-21
- Salty snacks are a steady companion for Germans
- Salty snack value sales projected to increase by almost 15% over 2021-26...
- ...while salty snacks volume sales are forecast to be rather flat

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Market size and forecast – salty snacks – value
- Market size and forecast – salty snacks – volume
- Market forecast and prediction intervals – salty snacks – value
- Market forecast and prediction intervals – salty snacks – volume

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