

# THE FUTURE OF BISCUITS, COOKIES AND CRACKERS: 2019

Global Annual Review: what's now and what's next for the biscuit, cookie and cracker market.



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# Report Content

- A look back, and a look ahead

## THE BIG STORIES

- Mintel's perspective

### The war on sugar

- Sugar reduction in sweet biscuits is an uphill battle
  - Graph 1: low/no/reduced sugar biscuit innovation as a percentage of total regional biscuit innovation, by region, Nov 2015-Oct 2018
- Prioritise portion control in Latin America
- Unilever launch savoury breakfast biscuits in the UK

### New sensations

- Temperature and texture are the new innovation frontiers
- Heatable sweet or savoury biscuits are evident in several different markets
- Potato biscuits bring new texture sensation to China

### Protein power

- High-protein biscuit innovation slows in the US, but speeds up in other markets
  - Graph 2: Sweet/savoury biscuit launches with a protein claim, by region, between Nov 2015 and Oct 2018
- Ryvita embraces 'trendy' protein
- Key players invest in protein in India

## IN THE NEXT TWO YEARS

- Mintel's perspective

### Concerns over sustainable palm oil will drive palm oil-free innovation globally

- Concerns over 'sustainable' palm oil will fuel palm oil-free innovation
- Private labels will push palm oil free claims in European biscuit launches
  - Graph 3: sweet biscuit/cookie, savoury biscuit and cracker launches where "palm oil-free" or similar and "sustainable palm oil" or similar appears on pack as a percentage of total launches, Sep 2013-Aug 2018
- Palm oil-free biscuits starting to appear in Latin America

### Flavour innovation

- Cracker flavours will get bolder to entice younger consumers
- Doritos Crackers score highly on excitement and taste

# The Future of Biscuits, Cookies and Crackers: 2019

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- The US leads the way with limited editions

## Vegan becomes part of 'clean label' positioning

- Interest in plant-based diets will see vegan claims in biscuits grow
- Vegan becomes part of clean label positioning in biscuits and crackers
  - Graph 4: launches of vegan biscuits, cookies and crackers, by top claims, Oct 2017-Sep 2018
- Plant protein could boost health perceptions around biscuits

## IN FIVE YEARS AND BEYOND

- Mintel's perspective
- Focus on broader health issues to make biscuits more permissible
- Penetration of claims around digestive health in biscuits remains low
  - Graph 5: penetration of digestive health claims in sweet biscuits/cookies, savoury biscuits & crackers, Sep 2015-Aug 2018
- Asian markets target children with gut-friendly biscuits
- Dental hygiene could be a unique product positioning for breakfast biscuits

## KEY MARKET DATA

- Fastest/slowest growing biscuits, cookies and crackers markets
  - Graph 6: fastest/slowest growing markets (5-year CAGR)
- Top claims in sweet biscuits
- Top claims in savoury biscuits and crackers
- Top flavours in sweet biscuits
- Top flavours in savoury biscuits and crackers

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