

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"After a period of impressive growth since its launch, the breakfast biscuits market lost momentum in 2014. That a quarter of users are interested in breakfast biscuits with a high fruit content, and a similar number are interested in high-protein versions, signals scope for further development."

– Aimee Townshend., Research Analyst

This report looks at the following areas:

- Lower-calorie sweet biscuits appeal to users
- Breakfast biscuits with protein or fruit attract interest from users
- Savoury biscuits, crackers and crispbread not considered a snack on their own

Sweet biscuits continue to dominate the market, accounting for two thirds of value and three quarters of volume. However, the high media coverage around the contribution of sugar to the UK's obesity problem in 2014 saw the health credentials of sweet biscuits come under scrutiny.

That four in 10 sweet biscuit eaters limit how often they eat these due to their high sugar content and three in 10 because they are unhealthy demonstrates the impact of health concerns on the market. The interest in reduced calorie versions, however, suggests scope for operators to address such concerns.

With usage standing at just over 40% of adults, breakfast biscuits have enjoyed several years of impressive growth, however, the segment lost momentum in 2014. Breakfast biscuits with a high fruit content and versions high in protein spark interest, offering an area of further development for manufacturers.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Abbreviations

Executive Summary

The market

Figure 1: Total UK retail value sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, 2009-19

Market factors

Companies, brands and innovation

Masterbrand strategy helps United Biscuits extend its lead in sweet biscuits

Figure 2: Leading manufacturers in the sweet biscuits, breakfast biscuits and cereal/snack bars market, by value share, 2014/15*

Jacob's masterbrand strategy boosts sales in savoury biscuits

Kellogg's retains top spot in breakfast biscuits and cereal/snack bars despite falling sales

Free-from launches leap ahead, healthier sweet biscuits remain rare in NPD

The consumer

Nine in 10 adults eat sweet biscuits

Figure 3: Frequency of eating sweet biscuits, breakfast biscuits/cereal bar, savoury biscuits, crackers and rice cakes, December 2014

Snacking remains central to biscuits

Figure 4: Occasions for eating sweet biscuits, savoury biscuits, cereal bars and crackers, December 2014

Health concerns are a barrier to eating sweet biscuits

Figure 5: Barriers to eating sweet biscuits, December 2014

Dryness is biggest barrier to savoury biscuits, crackers and crispbread usage

Figure 6: Barriers to eating crackers, savoury biscuits and crispbread, December 2014

Reduced calorie versions of favourite biscuits interest one in five

Figure 7: Interest in selected sweet biscuits, breakfast biscuits and cereal bars product concepts, December 2014

What we think

Issues and Insights

Lower-calorie sweet biscuits appeal to users

The facts

The implications

Breakfast biscuits with protein or fruit attract interest from users

The facts

The implications

Savoury biscuits, crackers and crispbread not considered a snack on their own

The facts

The implications

Trend Application

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Trend: Sense of the Intense

Trend: Transumers

Trend: Life Hacking

Market Drivers

Key points

Consumers find themselves in a better financial situation in 2014

Figure 8: Consumers' financial health index, January 2009-January 2015

Sugar attracts negative media in 2014

Growth of core sweet biscuits users good news for the market

Figure 9: Trends in the age structure of the UK population, 2009-14 and 2014-19

Strengths and Weaknesses

Strengths

Weaknesses

Who's Innovating?

Key points

Healthy claims remain rare in sweet biscuits

Figure 10: NPD in the UK sweet biscuits market, top 15 claims in 2014, 2010-14

Free-from launches leap ahead in 2013

Healthier sweet biscuits remain rare in NPD

'No added refined sugar' biscuits should appeal

On-the-go positioning remains rare

Modest activity in premium segment

Biscuits continue to see category blurring

Chocolate brands continue to explore biscuits

Biscuits look to desserts

Traditional biscuits from other countries enter the UK market

Low-allergen claims leap ahead in savoury biscuits/crackers

Figure 11: NPD in the UK savoury biscuits/crackers market, top 15 claims in 2014, 2010-14

NPD in breakfast biscuits helps to inject interest into the category

Low-sugar and all-natural claims gain in cereal/snack bars in 2014

Figure 12: NPD in the UK cereal/snack/energy bar, top 15 claims in 2014, 2010-14

L/N/R sugar claims remain rare

Mainstream bars look to protein

Market Size and Forecast

Key points

Market suffers from sugar concerns

Figure 13: Total UK retail volume and value sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, 2009-19

Value sales expected to be propped up by inflation and trading up in the biscuits, cookies and crackers market

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 14: Total UK retail value sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, 2009-19
 Figure 15: Total UK retail volume sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, 2009-19

Methodology

Segment Performance

Key points

Treat biscuits struggle

Figure 16: Total UK retail volume and value sales of sweet biscuits, 2009-19

Figure 17: Total UK retail value sales of sweet biscuits, 2009-19

Figure 18: Total UK retail volume sales of sweet biscuits, 2009-19

Savoury biscuits leap ahead

Figure 19: Total UK retail volume and value sales of savoury biscuits, crackers, crispbread and rice cakes, 2009-19

Figure 20: Total UK retail value sales of savoury biscuits, crackers, crispbread and rice cakes, 2009-19

Figure 21: Total UK retail volume sales of savoury biscuits, crackers, crispbread and rice cakes, 2009-19

Cereal/snack bars lose their momentum in 2014

Figure 22: Total UK retail volume and value sales of breakfast biscuits and cereal/snack bars, 2009-19

Figure 23: Total UK retail value sales of breakfast biscuits and cereal/snack bars, 2009-19

Figure 24: Total UK retail volume sales of breakfast biscuits and cereal/snack bars, 2009-19

Figure 25: UK retail value sales of sweet and savoury biscuits, cereal/snack bars and breakfast biscuits, by segment, 2013 and 2014

Figure 26: UK retail volume sales of sweet and savoury biscuits, cereal/snack bars and breakfast biscuits, by segment, 2013 and 2014

Market Share

Key points

Sweet biscuits, breakfast biscuits and cereal/snack bars

Masterbrand strategy helps United Biscuits extend its lead

Fox's embarks on revamp to re-energise sales

Oreo continues strong growth

Maryland looks to soft baked cookies for next hit

Kellogg's retains leading position despite falling sales

Belvita gains share

Figure 27: Leading brands' sales in the sweet biscuits, breakfast biscuits and cereal/snack bars market, by value and volume, 2013/14 and 2014/15

Figure 28: Leading manufacturers' sales in the sweet biscuits, breakfast biscuits and cereal/snack bars market, by value and volume, 2013/14 and 2014/15

Savoury biscuits, crackers and crispbread

Jacob's masterbrand strategy boosts sales

Ritz leaps ahead with first TV campaign in decades

New entrants make their mark

Figure 29: Leading brands in the savoury biscuits, crackers, crispbread and rice cakes market, by value and volume, 2012/13 and 2013/14

Figure 30: Leading manufacturers' sales in the savoury biscuits, crackers, crispbread and rice cakes market, by value and volume, 2012/13 and 2013/14

Companies and Products

United Biscuits

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Background
- Product range
- Product innovation
- Recent activity and promotion
- Burton's Biscuit Company
- Background
- Product range
- Product innovation
- Recent activity and promotion
- Associated British Foods
- Background
- Product range and innovation
- Recent activity and promotion
- 2 Sisters Food Group
- Background
- Product range
- Product innovation
- Recent activity and promotion
- Mondelēz International
- Background
- Product range and innovation
- Recent activity and promotion
- Eat Natural
- Background
- Product range and innovation
- General Mills
- Background
- Product range and innovation
- Recent activity and promotion
- Kellogg's
- Background
- Product range and innovation
- Recent activity and promotion

Brand Communication and Promotion

Key points

Adspend reaches a four-year high

Figure 31: Total above-the-line advertising expenditure in the UK sweet and savoury biscuits, crackers and breakfast biscuit/cereal bar market, 2011-14

Figure 32: Above-the-line advertising expenditure in the UK sweet and savoury biscuits, crackers and breakfast biscuit/cereal bar market, by segment, 2011-14

UB invests in the three-year 'Sweet' masterbrand campaign

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mondelēz leads total adspend

Figure 33: Above-the-line advertising expenditure in the UK sweet and savoury biscuits, crackers and breakfast biscuit/cereal bar market, by top five advertisers' share, 2011-14

Figure 34: Above-the-line advertising expenditure in the UK sweet and savoury biscuits, crackers and breakfast biscuits/cereal bars market, by top five advertisers, 2011-14

Playfulness provides the advertising theme for Oreo

ABF focuses on the versatility of Ryvita

Brand Research – Biscuits, Cookies and Crackers

What you need to know

Brand map

Figure 35: Attitudes towards and usage of selected brands, January 2015

Key brand metrics

Figure 36: Key metrics for selected brands, January 2015

Brand attitudes: The majority of these brands tend to have images built on perceptions of quality and strong reputations

Figure 37: Attitudes, by brand, January 2015

Brand personality: McVitie's Jaffa Cakes and Fox's enjoy the most upbeat brand images

Figure 38: Brand personality – macro image, January 2015

Healthiness is often associated with being bland

Figure 39: Brand personality – micro image, January 2015

Brand analysis

McVitie's Digestives is an accessible and traditional option

Figure 40: User profile of McVitie's Digestives, January 2015

McVitie's Jaffa Cakes benefits from its unique product offering

Figure 41: User profile of McVitie's Jaffa Cakes, January 2015

Jacob's accessibility creates usage despite a basic brand image

Figure 42: User profile of Jacob's, January 2015

Fox's has an upbeat image but lacks the trust enjoyed by the McVitie's brands

Figure 43: User profile of Fox's, January 2015

Nairn's lacks indulgence but image of healthiness suggests potential for growth

Figure 44: User profile of Nairn's, January 2015

Oreo's specific appeal to younger groups limits overall scores

Figure 45: User profile of Oreo, January 2015

Ryvita most likely to be thought of as bland, but healthiness gives a specific purpose

Figure 46: User profile of Ryvita, January 2015

The Consumer – Usage of Biscuits, Cookies and Crackers

Key points

Nine in 10 adults eat sweet biscuits

Figure 47: Usage of biscuits, cookies and crackers, December 2014

Figure 48: Frequency of eating sweet biscuits, breakfast biscuits/cereal bar, savoury biscuits, crackers and rice cakes, December 2014

Lighter versions of biscuits eaten by less than half of adults

Breakfast biscuits and light/low-fat biscuits attract similar users

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Biscuits, Cookies and Crackers - UK - April 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Women are core users of savoury biscuits, crackers and crispbread

The Consumer – Occasions for Eating Biscuits, Cookies and Crackers

Key points

Snacking remains central to biscuits

Figure 49: Occasions for eating sweet biscuits, savoury biscuits, cereal bars and crackers, December 2014

Biscuits lack treat associations

On-the-go usage remains low

Savoury biscuits tailored to a cheeseboard

The Consumer – Barriers to Eating Biscuits, Cookies and Crackers

Key points

Health concerns are a barrier to eating sweet biscuits

Figure 50: Barriers to eating sweet biscuits, December 2014

Healthier variants have untapped potential

Perceived lack of portion control discourages sweet biscuit usage

Dryness is biggest barrier to savoury biscuits, crackers and crispbread usage

Figure 51: Barriers to eating crackers, savoury biscuits and crispbread, December 2014

The Consumer – Sweet Biscuits and Breakfast Biscuits/Cereal Bar Product Enticements

Key points

Reduced calorie versions of favourite biscuits interest one in five

Figure 52: Interest in selected sweet biscuits, breakfast biscuits and cereal bars product concepts, December 2014

Sugar-free biscuits sweetened with stevia appeal to one in seven

More indulgent biscuits could tap into treat behaviour

Heatable cookies/biscuits blur boundaries with dessert category

Breakfast biscuits with protein or fruit attract interest from users

A quarter of users are drawn to high-protein breakfast biscuits

Sweet biscuits tailored to hot drinks appeal to one in five

Appendix – Market Size and Forecast

Figure 53: Total UK retail value sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, best- and worst-case forecast, 2014-19

Figure 54: Total UK retail volume sales of sweet and savoury biscuits, breakfast biscuits, cereal/snack bars, crackers, crispbread and rice cakes, best- and worst-case forecast, 2014-19

Figure 55: Total UK retail value sales of savoury biscuits, crackers, crispbread and rice cakes, best- and worst-case forecast, 2014-19

Figure 56: Total UK retail volume sales of savoury biscuits, crackers, crispbread and rice cakes, best- and worst-case forecast, 2014-19

Figure 57: Total UK retail value sales of sweet biscuits, best- and worst-case forecast, 2014-19

Figure 58: Total UK retail volume sales of sweet biscuits, best- and worst-case forecast, 2014-19

Figure 59: Total UK retail value sales of breakfast biscuits and cereal/snack bars, best- and worst-case forecast, 2014-19

Figure 60: Total UK retail volume sales of breakfast biscuits and cereal/snack bars, best- and worst-case forecast, 2014-19

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com