

## Consumer Snacking - UK - March 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.



“Despite the interest in added value snacks, the current offering is limited when it comes to various health-related factors. However, with spending habits predicted to relax, operators could be missing out on consumers being better able to trade up to these types of products.”

— Colette Warren, Food and Drink Analyst

### This report looks at the following areas:

- Low-sugar NPD activity is low relative to demand
- More opportunities in added-value snacks
- Scope for the snacks industry to position single-portion packs as a permissible treat

Snacking in the UK is almost universal with 97% of adults doing so. Of consumers who snack, nearly one in 10 snack three times a day or more and around three in four do so at least once a day, further signalling how ingrained snacking has become for Britons.

Health considerations continue to play a significant role in the market. Though most of the pressure on operators in this market to step up their game is coming from the government, there are a number of health-related NPD (New Product Development) opportunities that are consumer-driven. This includes packs to help with portion control, L/N/R (low/no/reduced) sugar snacks and products with added benefits (eg high in fibre, protein).

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Consumer Snacking - UK - March 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

Market factors

A rise in real disposable income should bolster consumer spending

Concerns around sugar rise in 2014

Obesity crisis puts pressure on snack makers

Pledges to cap portion size and calorie content aim to help consumers

Innovation will be key in capitalising on demographic changes

Companies, brands and innovation

Cakes, pastries & sweet goods attract the most NPD

Low-allergen snack claims gain in popularity in 2014

Figure 1: New product launches in the UK snacks market, by top 15 claims, 2014

Total adspend rises for the third year in 2014

The consumer

There is a role for both healthy and indulgent snacks

Figure 2: Snacks eaten between meals, December 2014

Innovation prompts more than a quarter of impulse buyers

Figure 3: Factors that prompt people to buy a snack on impulse, December 2014

A quarter of snackers look for snacks that keep you fuller for longer

Figure 4: Attributes that people look for when buying a snack, December 2014

One in three snackers sometimes eat snacks instead of a meal

Figure 5: Attitudes towards snacking, December 2014

A third of snack eaters see snacks containing oats as filling

Figure 6: Qualities associated with a filling snack, December 2014

What we think

### Issues and Insights

Low-sugar NPD activity is low relative to demand

The facts

The implications

More opportunities in added-value snacks

The facts

The implications

Scope for the snacks industry to position single-portion packs as a permissible treat

The facts

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Consumer Snacking - UK - March 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.

## The implications

### Trend Application

Trend: Make it Mine

Trend: Attention Economy

Mintel Future: Brand Intervention

### Market Drivers

#### Key points

A rise in real disposable income should bolster consumer spending

Figure 7: Financial wellbeing index, January 2009-January 2015

Concerns around sugar rise in 2014

Sugar makes headlines in 2014

Snackers cut back on sweet treats

Obesity crisis puts pressure on snack makers

Pledges to cap portion size and calorie content aim to help consumers

Innovation will be key in capitalising on demographic changes

Under-35s snack the most often

Figure 8: Trends in the age structure of the UK population, 2009-14 and 2014-19

Rise in older cohorts also poses a challenge for the snack market

### Strengths and Weaknesses

#### Strengths

#### Weaknesses

### Who's Innovating?

#### Key points

#### Definition

Cakes, pastries & sweet goods attract the most NPD

Figure 9: New product launches in the UK snacks\* market, by top 15 segments, 2010-14

The share of own-label activity has fallen year on year since 2011

Figure 10: New product launches in the UK snacks market, own-label vs branded, 2010-14

Brands explore category-crossing products

Low-allergen snack claims gain in popularity in 2014

Figure 11: New product launches in the UK snacks market, by top 15 claims, 2010-14

Seasonal snack claims lose pace

Premium claims plateau

Brands look to target grown-ups

Untapped demand for on-the-go snacks

Low/no/reduced sugar falls outside the top 15 claims on snacks

Figure 12: New product launches in the UK snacks market, by selected health claims, 2010-14

Could more segments utilise high-fibre claims?

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Consumer Snacking - UK - March 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.

New textures and ingredients gain attention

Crisps and salty snacks see launches ranging from kale to quinoa

Yogurt and cookies go soft

## Brand Communication and Promotion

Key points

Total adspend rises for the third year in 2014

Figure 13: Total advertising expenditure on snacking products \*, 2010-14

Chocolate continues to lead snacking adspend

Figure 14: Advertising expenditure on snacking products, by leading categories, 2010-14

The top 10 advertisers account for more than half of adspend on snacks

Figure 15: Total media advertising expenditure on snacking products, by top 10 advertisers, 2010-14

Müller and Danone lose adspend share whilst Yoplait gains

Mondelēz increases spend by £4 million in 2014

Mars steps up spend on five of its leading brands

Figure 16: Total media advertising expenditure on snacking products, by top 10 brands, 2010-14

## Brand Research – Consumer Snacking

What you need to know

Brand map

Figure 17: Attitudes towards and usage of selected brands, February, October, November 2014 and January 2015

Key brand metrics

Figure 18: Key metrics for selected brands, February, October, November 2014 and January 2015

Brand attitudes: Many brands are defined by trust, quality and reputation

Figure 19: Attitudes, by brand, February, October, November 2014 and January 2015

Brand personality: Kettle Chips has the strongest perception of exclusivity

Figure 20: Brand personality – macro image, February, October, November 2014 and January 2015

Brand analysis

Cadbury Dairy Milk looks likely to continue success

Figure 21: User profile of Cadbury Dairy Milk, February 2014

Walkers' product range ensures there is something for everyone

Figure 22: User profile of Walkers, November 2014

Galaxy's promotion of accessible luxury attracts wide range of consumers

Figure 23: User profile of Galaxy, February 2014

McVitie's Digestives is most likely to be seen as boring or tired but maintains tradition

Figure 24: User profile of McVitie's Digestives, January 2015

Haribo performs strongly among families

Figure 25: User profile of Haribo, October 2014

Fox's has an upbeat brand image but struggles to engage with younger groups

Figure 26: User profile of Fox's, January 2015

Kettle Chips holds more premium connotations than other brands

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

# Consumer Snacking - UK - March 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 27: User profile of Kettle Chips, November 2014

Butterkist's popcorn has more sporadic usage and a weaker emotional bond

Figure 28: User profile of Butterkist, November 2014

Skittles appeals to younger groups in particular

Figure 29: User profile of Skittles, October 2014

## The Consumer – Snacks Eaten, How Often & Where

### Key points

There is a role for both healthy and indulgent snacks

Figure 30: Snacks eaten between meals, December 2014

Chocolate wins on impulse

Figure 31: Snacks bought as an impulse purchase, December 2014

Fruit prevails in planned snacking

Figure 32: Snacks bought as a planned purchase, December 2014

Three in four people snack at least once a day

Figure 33: How often people snack between meals, by gender and age, December 2014

A third of energy/sports bar snackers most likely eat them at work/place of study

Figure 34: Where consumers are most likely to eat snacks between meals, by type of snack, December 2014

## The Consumer – Factors that Prompt an Impulse Buy

### Key points

Innovation prompts more than a quarter of impulse buyers

Figure 35: Factors that prompt people to buy a snack on impulse, December 2014

Selected snacks have looked to NPD to drive engagement

More snack segments could benefit from NPD

Moving beyond the core category should resonate especially with families

Meal deals can drive visibility

## The Consumer – Attributes Influencing Snack Choice

### Key points

A quarter of snackers look for snacks that keep you fuller for longer

Figure 36: Attributes that people look for when buying a snack, December 2014

Health...

...vs Indulgence

Untapped interest in high-protein snacks

Crisps and popcorn move in on the action

## The Consumer – Attitudes towards Snacking

### Key points

One in three snackers sometimes eat snacks instead of a meal

Figure 37: Attitudes towards snacking, December 2014

Portion control offers a strong selling point for single-portion packs

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)

## Consumer Snacking - UK - March 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.

FDF members commit to a calorie cap

Mini formats and portion packs can bolster a permissible positioning

A third of snack eaters see snacks containing oats as filling

Figure 38: Qualities associated with a filling snack, December 2014

A quarter of consumers view a snack as filling if it contains protein

### Appendix – Brand Communication and Promotion

Figure 39: Advertising expenditure on snacking products, by leading categories, 2010-14

### Appendix – Who's Innovating?

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://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](mailto:reports@mintel.com)