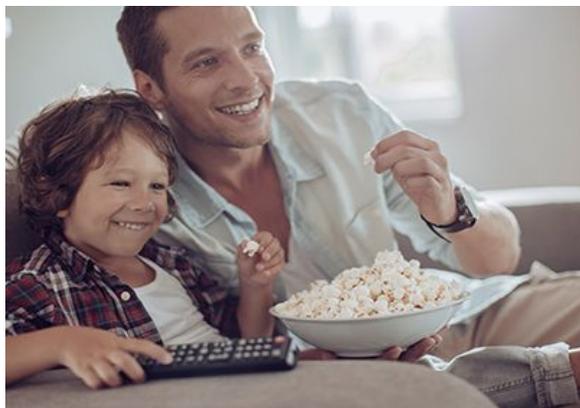


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“Snacking remains an ingrained habit for Britons. The view of snacks as an important energy source throughout the day, and as a necessity in busy lifestyles, underpins this habit. It also points to further longevity for snacking and the relevance for snacks to align with catering to or countering busy lifestyles.”

– **Kiti Soininen, Category Director – UK Food & Drink**

This report looks at the following areas:

- Snacks’ energising role chimes widely
- Snack brands can stand out by catering to or countering busy lifestyles
- Demand for healthy and indulgent snacks, and more clarity

The snacking culture in the UK is pervasive. The perceived role of snacks in keeping energy levels up is a key driver here, ensuring they are seen to have a legitimate place in the diet. Also boding well for the longevity of snacking, many view snacks as a necessity in busy lifestyles. This underlines the continuing need for snacks to align with providing energy and fitting in with time-poor lifestyles, such as through relevant ingredients, marketing messages and portable formats.

Fresh fruit, crisps and chocolate continue to share pole position among the nation’s snack choices, revealing how healthy snacks and treats mingle on most people’s menus, catering to different needs, moods and occasions. Reflecting this, and despite PHE (Public Health England)’s scrutiny of snacks, not all snackers look for healthy options all or most of the time. This puts the industry in a challenging position to deliver on PHE’s sugar and calorie reduction, while continuing to cater for the sizeable demand for treats.

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The facts

The implications

Snack brands can stand out by catering to or countering busy lifestyles

The facts

The implications

Demand for healthy and indulgent snacks, and more clarity

The facts

The implications

The Market – What You Need to Know

PHE aims to combat child obesity, shaking up the snacking market

New calorie targets for kids’ snacks and adult meals

People try to eat mostly healthily, but are more relaxed when snacking

Busy lifestyles fuel snacking

Ageing population poses a challenge for snacks

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PHE aims to combat child obesity, shaking up the snacking market

Sugar reduction

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100-calorie recommendation for kids’ snacks

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People try to eat mostly healthily, but are more relaxed when snacking

Busy lifestyles fuel snacking

Ageing population poses a challenge for snacks

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L/N/R sugar nearly doubles share

Fibre and protein claims gain traction

Sweet and savoury flavour combinations go beyond salted caramel

Category blurring and brand stretch continue

Advertising spend falls in 2017

Sweet snacks put the focus on sharing and social connections

Mars and Lindt focus on connecting with oneself

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Dynamic growth in L/N/R allergen claims

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Ethical packaging claims in long-term growth

Widespread concern about plastic packaging

Compostable, plant-based foil adopted by various smaller brands

Vegan claims leap ahead

L/N/R sugar nearly doubles share

Leading players cut sugar in sweets...

...cakes...

...and chocolate

Fibre claims gain traction

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Sweet and savoury flavour combinations go beyond salted caramel

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Category blurring and brand stretch continue

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Sweet snack brands put the focus on sharing and social connections

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Mr Kipling shows a kindly 'thief'

Butterkist focuses on family time

McVitie's shifts focus onto 'Sweeter Together'

Mentos looks to connect people

Mars and Lindt prompt fans to relax, Snickers pushes hunger-busting

Mars and Lindt focus on connecting with oneself

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Snickers continues with hunger-busting message

Diversity remains at the centre of Maltesers' advertising

Sweet and savoury snacks look to tap into the 'big night in' occasion

Crisps/savoury snacks offer free films

Nestlé links up with Sky Store

The Consumer – What You Need to Know

Fresh fruit, crisps and chocolate are the nation's top three snacks

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 Snacks are on the daily menu for most
 Home is still where people snack the most
 Only two in five snackers look mostly for healthy snacks
 No magic bullet – Health priorities vary
 Snacks’ mood boost and energising roles chime widely
 Evenings in still a key occasion for snacks
 Ease of opening is under-utilised in snacks

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Snacks' mood boost and energising roles chime widely
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