

Potato and Tortilla Chips - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



Potato and tortilla chips have generated solid growth in recent years, driven by the increasing prevalence of snacking, a steady stream of new flavors, and the category's status as a permissible indulgence. Bold and creative new flavors and forms will continue to drive sales in coming years, along with a greater emphasis on premium quality and clean ingredient lists.

This report looks at the following areas:

- Category on track for continued modest growth
- Potato chip purchase near universal, tortilla chips have room to grow
- Chip purchasers can be creatures of habit

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

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

Potato and Tortilla Chips - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Category on track for continued modest growth

Figure 1: Total US sales and fan chart forecast of potato and tortilla chips, at current prices, 2012-22

Potato chip purchase near universal, tortilla chips have room to grow

Figure 2: Chips purchase, November 2017

Chip purchasers can be creatures of habit

Figure 3: Factors influencing chips purchase, November 2017

The opportunities

Snacking dominates usage for both potato and tortilla chips

Figure 4: Chip occasions, November 2017

Younger chip purchasers more likely to buy on impulse

Figure 5: Chip behaviors, by age, November 2017

Adults 35-54, a key secondary target, express strong interest in concepts

Figure 6: Chip innovation areas, by age, November 2017

What it means

The Market – What You Need to Know

Category on track for continued modest growth

Potato chips account for majority of category sales

Salty snacks maintain strong growth

Snacking continues to grow more prevalent

Market Size and Forecast

Category on track for continued modest growth

Figure 7: Total US sales and fan chart forecast of potato and tortilla chips, at current prices, 2012-22

Figure 8: Total US sales and forecast of potato and tortilla chips, at current prices, 2012-22

Market Breakdown

Potato chips account for majority of category sales

Figure 9: Share of potato and tortilla chips sales, by segment, 2017

Tortilla chips drive growth

Figure 10: Sales of potato and tortilla chips, by segment, 2012-17

Market Perspective

Salty snacks maintain strong growth

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Potato and Tortilla Chips - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Figure 11: Total US sales of salty snacks, by segment, 2012-17

Market Factors

Snacking continues to grow more prevalent

Figure 12: Snacking frequency, March 2017

Number of households with children down for now

Figure 13: Households, by presence of own children, 2007-17

Key Players – What You Need to Know

PepsiCo remains dominant

Ruffles gains on shift to young male target

Heat wave: Takis continues to gain on intensely hot flavors

Continued decline for old-line regional chip brands

Uglies: using blemished potatoes to combat food waste

Company Sales of Potato and Tortilla Chips

PepsiCo remains dominant

Campbell's purchase of Snyder's-Lance may intensify competition

Private label gains may reflect the weakness of smaller regional brands

Sales of potato and tortilla chips by company

Figure 14: Multi-outlet sales of potato and tortilla chips, by leading companies, rolling 52 weeks 2016 and 2017

What's Working?

Ruffles gains on shift to young male target

Heat wave: Takis continues to gain on intensely hot flavors

On the Border continues to grow, branches into bold flavors

What's Struggling?

Continued decline for old-line regional chip brands

Sales of baked chips stagnate

What's Next?

Cape Cod continues to push premiumization

Uglies: using blemished potatoes to combat food waste

Increasing emphasis on clean labels

Figure 15: Potato and tortilla chip packaging claims, 2013-2017

Beyond flavor: textures and combinations

The Consumer – What You Need to Know

Potato chip purchase near universal, tortilla chips have room to grow

Chip purchasers can be creatures of habit

Snacking dominates usage for both potato and tortilla chips

Many chip purchasers guided by habit, but impulse could drive growth

Restaurant style and spicy flavors draw interest, consistent with market success

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Potato and Tortilla Chips - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Okay to indulge on chips, up to a point

Chips Purchase

Potato chip purchase near universal, tortilla chips have room to grow

Plain varieties purchased most widely, but category increasingly diverse

Figure 16: Chips purchase, November 2017

Variety of chips purchased drops among older adults

Figure 17: Chips purchase, by age, November 2017

Highest incidence in households with school-aged kids

Figure 18: Chips purchase, by presence and age of children, November 2017

Tortilla chip purchase skews to White, Hispanic consumers

Figure 19: Chips purchase, by race and Hispanic origin, November 2017

Factors Influencing Chips Purchase

Chip purchasers can be creatures of habit

Figure 20: Factors influencing chips purchase, November 2017

Younger purchasers more interested in new flavors, dietary preferences

Older shoppers more attuned to health measures

Figure 21: Factors influencing chips purchase, by age, November 2017

Chip Occasions

Snacking dominates usage for both potato and tortilla chips

Figure 22: Chip occasions, November 2017

Chip Behaviors

Many chip purchasers guided by habit, but impulse could drive growth

Figure 23: Chip behaviors, November 2017

Younger chip purchasers more likely to buy on impulse

Figure 24: Chip behaviors, by age, November 2017

Chip Innovation Areas

Restaurant style and spicy flavors draw interest, consistent with market success

Figure 25: Chip Innovation areas, November 2017

Adults 35-54, a key secondary target, express strong interest in concepts

Figure 26: Chip Innovation areas, by age, November 2017

Attitudes toward Chips

Okay to indulge on chips, up to a point

Figure 27: Attitudes toward chips, November 2017

Those purchasing more are an opportunity for premium, all-natural chips

Figure 28: Attitudes toward chips, by change in amount purchased, November 2017

Appendix – Data Sources and Abbreviations

Data sources

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Potato and Tortilla Chips - US - February 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 29: Total US sales and forecast of potato and tortilla chips, at inflation-adjusted prices, 2012-22

Figure 30: Total US sales and forecast of potato chips, at current prices, 2012-22

Figure 31: Total US sales and forecast of potato chips, at inflation-adjusted prices, 2012-22

Figure 32: Total US sales and forecast of tortilla chips, at current prices, 2012-22

Figure 33: Total US sales and forecast of tortilla chips, at inflation-adjusted prices, 2012-22

Figure 34: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2012-2017

Appendix – Key Players

Figure 35: Multi-outlet sales of potato chips, by leading companies and brands, rolling 52 weeks 2016 and 2017

Figure 36: Multi-outlet sales of tortilla chips, by leading companies and brands, rolling 52 weeks 2016 and 2017

BUY THIS
REPORT NOW

VISIT: store.mintel.com

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

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com