

Savoury Spreads & Dips - UK - August 2019

Report Price: £2195 | \$2995 | €2600

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

This report looks at the following areas:

In ready-made sandwich fillers more premium and healthier options, including more products with high-protein, superfood and vegetable-based ingredients, are needed to overcome negative perceptions and drive higher usage.

- More ideas on pairings offers a way to keep sales of dips growing
- Greater focus on ingredients needed to increase usage of fillers
- Dips well placed to benefit from positive health claims and spicy flavours



“Sales of dips have grown strongly in recent years, but further opportunities exist for pairing dips with snacks, including pairings positioned for eating with specific alcoholic drinks, as well as encouraging higher usage with main meals.”

– Richard Caines, Senior Food & Drink Analyst

Buy this report now

Visit store.mintel.com

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

Table of Contents

OVERVIEW

- What you need to know
- Products covered in this Report
- Savoury spreads
- Dips
- Excluded

EXECUTIVE SUMMARY

- The market
- Sales of savoury spreads show small recovery
Figure 1: UK retail value sales of savoury spreads, 2014-24
- Strong growth in sales of dips
Figure 2: UK retail value sales of dips, 2014-24
- Declining bread sales has been bad news for savoury spreads
- Competition from other foods for breakfast and lunch occasions
- Snacking supports savoury spreads and dips
- Companies and brands
- Marmite top brand in savoury spreads
Figure 3: Leading brands' value shares in the UK savoury spreads market, 2018/19*
- Own-label dominates dips
Figure 4: Leading brands' value shares in the UK dips market, 2018/19*
- Dips are the biggest area for launches
- More new launches suitable for vegetarians and vegans
- Spicy flavours adding a kick to spreads
- Dips promote added health benefits
- Premium own-label looks to encourage trading up, hot variants add variety to dips
- The consumer
- Seven in 10 use savoury spreads and dips
- Savoury spreads are used more frequently than dips
Figure 5: Frequency of usage of savoury spreads and dips, June 2019
- Dips are mostly used with tortilla chips
Figure 6: Foods people use dips with, June 2019
- Healthier attributes warrant attention in dips
- Single-serve formats garner significant interest
Figure 7: Interest in trying different dips products, June 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **More premium-quality ingredients needed in sandwich fillers**
Figure 8: Features that would encourage usage of ready-made sandwich fillers, June 2019
- **Short shelf life is a barrier to using chilled sandwich fillers**
Figure 9: Behaviours relating to savoury spreads and dips, June 2019
- **More exciting flavours and interesting textures would also help**
- **Opportunity for matching dips with alcoholic drinks**
Figure 10: Attitudes towards savoury spreads and dips, June 2019
- **What we think**

ISSUES AND INSIGHTS

- **More ideas on pairings offers a way to keep sales of dips growing**
- **The facts**
- **The implications**
- **Greater focus on ingredients needed to increase usage of fillers**
- **The facts**
- **The implications**
- **Dips well placed to benefit from positive health claims and spicy flavours**
- **The facts**
- **The implications**

THE MARKET – WHAT YOU NEED TO KNOW

- **Sales of savoury spreads show small recovery**
- **Levelling out of sales of savoury spreads forecast**
- **Strong growth seen in sales of dips**
- **Sales of dips forecast to continue growing**
- **Declining bread consumption has been bad news for savoury spreads**
- **Competition from other foods for breakfast and lunch occasions**
- **Snacking supports savoury spreads and dips**
- **Brexit uncertainties make price trends difficult to predict**
- **Projected decline in core 20-34-year-old users**

MARKET SIZE AND FORECAST

- **Sales of savoury spreads show small recovery**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

Figure 11: UK retail value and volume sales of savoury spreads, 2014-24

- **Levelling out of sales of savoury spreads expected**

Figure 12: UK retail value sales of savoury spreads, 2014-24

- **Strong growth seen in sales of dips**

Figure 13: UK retail value and volume sales of dips, 2014-24

- **Sales of dips forecast to continue growing**

Figure 14: UK retail value sales of dips, 2014-24

- **Forecast methodology**

MARKET SEGMENTATION

- **Dips continue growth and spreads rebound**

Figure 15: UK retail value and volume sales of savoury spreads and dips, by segment, 2016-18

MARKET DRIVERS

- **Declining bread consumption has been bad news for savoury spreads**
- **Competition from other foods for breakfast and lunch occasions**
- **Breakfast eating habits are changing**
- **Out-of-home lunch market poses a threat to packed lunches**

Figure 16: Most popular lunch foods, April 2018

- **Snacking supports sales of savoury spreads and dips**
- **Brexit uncertainties make price trends difficult to predict**
- **Projected decline in core 20-34-year-old users**

Figure 17: Trends in the age structure of the UK population, 2014-24

COMPANIES AND BRANDS – WHAT YOU NEED TO KNOW

- **Marmite top brand in savoury spreads**
- **Own-label dominates dips**
- **Dips are biggest area for new product launches**
- **More new launches suitable for vegetarians and vegans**
- **Spicy flavours adding a kick to spreads**
- **Dips promote added health benefits**
- **Premium own-label looks to encourage trading up, hot variants add variety to dips**

MARKET SHARE

- **Marmite the top brand in savoury spreads**

Figure 18: Leading brands' value and volume sales and shares in the savoury spreads market, 2017/18 and 2018/19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

- **Dips dominated by own-label products**

Figure 19: Leading brands' value and volume sales and shares in the dips market, 2017/18 and 2018/19

START-UPS AND DISRUPTORS CASE STUDY – CHICP

- **Company Overview**
- **Website**
- **What is it?**

Figure 20: Example of ChicP Product, July 2019

- **Founded**
- **Founder's story:**
- **Financial metrics:**
- **Sources of funding and support:**
- **What we think**
- **Why it could succeed**
- **Why it could fail**
- **The verdict**
- **Product details**

Figure 21: ChicP product images, July 2019

Figure 22: Example of ChicP product launches, 2016–2019

- **Stockists**

LAUNCH ACTIVITY AND INNOVATION

- **Dips are the biggest area for new product launches**

Figure 23: New product launches in the UK savoury spreads and dips market, by sub-category, 2014–19

- **More new launches suitable for vegetarians**

Figure 24: Examples of new launches in savoury vegetable pastes/spreads, 2018/19

- **Olive tapenades put emphasis on provenance**

Figure 25: Examples of new launches of olive tapenades and bruschetta toppings, 2018/19

- **More vegan products for plant-based diets**

Figure 26: Examples of new launches of vegan spreads, 2018/19

- **Spicy flavours adding a kick to spreads**

Figure 27: Examples of new launches of savoury spreads with hot/spicy flavour twists, 2018/19

- **Bacon jam launches explore the sweet and savoury flavour trend**

Figure 28: Examples of new launches of bacon jams, 2018/19

- **Dips promote added health benefits**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Figure 29: Examples of new launches of dips making healthy eating claims, 2018/19

- **Premium own-label looks to encourage trading up**

Figure 30: Examples of premium own-label launches in dips, 2018/19

- **Fiery/hot variants add more variety to dips**

Figure 31: Examples of new launches of fiery/hot dips, 2018/19

- **On-trend turmeric appears in new dip launches**

Figure 32: Examples of turmeric as named ingredient in new launches of dips, 2018/19

ADVERTISING AND MARKETING ACTIVITY

- **Limited advertising for savoury spreads and dips**

Figure 33: Total above-the line, online display and direct mail advertising expenditure on savoury spreads, sandwich fillers and dips, 2015-18

- **Marmite continues long-standing theme**

Figure 34: Total above-the line, online display and direct mail advertising expenditure on savoury spreads, sandwich fillers and dips, by brand, 2015-18

- **Other brands supported by wider campaigns**

- **Nielsen Ad Intel coverage**

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Seven in 10 use savoury spreads and dips**
- **Savoury spreads are used more frequently than dips**
- **Dips are most widely used with tortilla chips**
- **Healthier attributes warrant attention in dips**
- **Single-serve formats garner significant interest**
- **More premium-quality ingredients needed in sandwich fillers**
- **More exciting flavours and interesting textures would also help**
- **Short shelf life is a barrier to using chilled sandwich fillers**
- **Half of users think taste of dips is more important than healthiness**
- **Opportunity for matching dips with alcoholic drinks**

USAGE OF SAVOURY SPREADS AND DIPS

- **Seven in 10 use savoury spreads or dips**

Figure 35: Usage of savoury spreads in the last 3 months, June 2019

- **More people using dips drives increase in sales**

Figure 36: Usage of dips in the last 3 months, June 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

FREQUENCY OF USAGE

- **Savoury spreads are used more frequently than dips**

Figure 37: Frequency of usage of savoury spreads and dips, June 2019

FOODS PEOPLE USE DIPS WITH

- **Dips are most widely used with tortilla chips**
Figure 38: Foods people use dips with, June 2019
- **High usage of pitta bread linked to popularity of hummus**
- **Opportunity to drive more usage of dips with meals**
- **Demand for more guidance**
- **Taking cues from chicken and burger bars**

INTEREST IN TRYING DIFFERENT DIP PRODUCTS

- **Healthier attributes warrant attention in dips**
Figure 39: Interest in trying different dips, June 2019
- **Single-serve formats garner significant interest**
- **A quarter interested in dips with spicy toppings**

FEATURES THAT WOULD ENCOURAGE USAGE OF READY-MADE SANDWICH FILLERS

- **More premium-quality ingredients needed in sandwich fillers**
Figure 40: Features that would encourage usage of ready-made sandwich fillers, June 2019
- **Focus on health will attract more users**
- **More exciting flavours and interesting textures would also help**

BEHAVIOURS RELATING TO SAVOURY SPREADS AND DIPS

- **Short shelf life is a barrier to using chilled sandwich fillers**
Figure 41: Behaviours relating to savoury spreads and dips, June 2019
- **Preference for low/calorie savoury spreads and dips**

ATTITUDES TOWARDS SAVOURY SPREADS AND DIPS

- **Half of users think taste of dips is more important than healthiness**
Figure 42: Attitudes towards savoury spreads and dips, June 2019
- **Opportunity for matching dips with alcoholic drinks**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

- **Consumer research methodology**

APPENDIX – MARKET SIZE AND FORECAST

- **Forecast methodology**

Figure 43: UK retail volume sales of savoury spreads, 2014–24

Figure 44: Best- and worst-case forecast of total UK retail value sales of savoury spreads, 2019–24

Figure 45: Best- and worst-case forecast of total UK retail volume sales of savoury spreads, 2019–24

Figure 46: UK retail volume sales of dips, 2014–24

Figure 47: Best- and worst-case forecast of total UK retail value sales of dips, 2019–24

Figure 48: Best- and worst-case forecast of total UK retail volume sales of dips, 2019–24

APPENDIX – MARKET SHARE

Figure 49: Leading manufacturers' value and volume sales and shares in the savoury spreads market, 2017/18 and 2018/19

Figure 50: Leading manufacturers' value and volume sales and shares in the dips market, 2017/18 and 2018/19

APPENDIX – LAUNCH ACTIVITY AND INNOVATION

Figure 51: New product launches in the UK savoury spreads* market (excluding dips), by private label vs branded, 2014–19

Figure 52: New product launches in the UK savoury spreads* market (excluding dips), by claim, 2014–19

Figure 53: New product launches in the UK dips market, by private label vs branded, 2014–19

Figure 54: New product launches in the UK dips market, by claim, 2014–19

Figure 55: New product launches in the UK dips market, by storage type, 2014–19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.