

## Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“More people being at home all day during COVID-19 lockdown periods has supported growth in sales of crisps, savoury snacks and nuts. Flavour innovation continues to be a major theme in NPD, including tapping interest in world cuisine flavours, while better-for-you products, premium varieties and pairing with dips and alcoholic drinks hold more potential for brands to increase sales.”  
– **Richard Caines, Senior Food & Drink Analyst**

This report looks at the following areas:

- **The impact of COVID-19 on sales of crisps, savoury snacks and nuts, and consumer behaviours.**
- **Frequency of eating crisps, savoury snacks and nuts, and types eaten.**
- **Different occasions for eating crisps, savoury snacks and nuts.**
- **New launch activity in crisps, savoury snacks and nuts, and perceptions and usage of the brands in these categories.**
- **Behaviours related to eating crisps, savoury snacks and nuts, and attitudes towards them.**

Flavour innovation is central to keeping users engaged with brands in the crisps, savoury snacks and nuts market, as shown by 40% of eaters and buyers agreeing that a brand that regularly brings out new flavours of savoury snacks is more appealing than one which does not. This includes exploring a wider range of world cuisine flavours to prevent users switching to brands innovating more in this area.

The COVID-19 pandemic and people snacking more at home boosted retail sales of crisps, savoury snacks and nuts in 2020, with value sales reaching nearly £4.47 billion, up 4% on 2019. Volume sales posted stronger growth of 5%, as purchasing shifted towards sharing bags and multipacks and away from higher-value single packs. The new wave of lockdowns in 2021 will support more snacking at home.

The COVID-19 pandemic has put a heightened spotlight on health, while the government's plans to tackle obesity include putting in place legislation to end volume price promotions of foods high in fat, sugar or salt (HFSS). Despite volume sales increasing in 2020, 50% of eaters claim to have cut back on these items in the last 12 months, highlighting how healthy eating is on their minds.

The spotlight on health dials up the need for brands to explore better-for-you products. While healthier crisps/crisp-style snacks are seen as not enough of a treat by 36% of category users, this being a minority view suggests that most are open to being swayed by healthier options. Savoury snacks made from pulses hold potential here, appealing to 44% of eaters and buyers of crisp, savoury snacks and nuts.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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](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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Table of Contents

### Overview

Key issues covered in this Report  
 COVID-19: market context  
 Economic and other assumptions  
 Products covered in this Report

### Executive Summary

Impact of COVID-19 on crisps, savoury snacks and nuts

Figure 1: Short-, medium- and long-term impact of COVID-19 on crisps, savoury snacks and nuts, 3 February 2021

The market

More snacking during first lockdown boosts 2020 sales

Gradual re-emergence of snacking out of home

Figure 2: Forecast of UK retail value sales of crisps, savoury snacks and nuts, 2015-25

Snacking firmly entrenched in British eating habits

Strong interest in healthy eating

Government emphasis on health intensifies under COVID-19

Companies and brands

Walkers extends its lead in crisps segment

Figure 3: Leading brands' shares in the UK crisps retail market, by value, 2019/20\*

Pringles leads growth in sales of other savoury snacks

Figure 4: Leading brands' shares in the UK potato-based, baked and other snacks market, by value, 2019/20\*

Butterkist drives most of the growth in popcorn

Flavour innovation a major theme in NPD

Different levels of spice intensity being explored

Format diversification a feature of brand extensions

Dip in advertising spending during COVID-19 pandemic

Walkers in strong position as most trusted brand

The consumer

More than nine in 10 eat crisps, savoury snacks and nuts

Crisps/crisp-style snacks have most frequent usage

Figure 5: Frequency of eating crisps, savoury snacks and nuts, November 2020

Snacking the primary driver of usage

Daytime snacking holds further potential for nuts and popcorn

Figure 6: Occasions when crisps, savoury snacks and nuts eaten in the last 3 months, November 2020

Strong interest in products featuring world cuisines

Alcoholic drinks and dips pairings hold more potential

Opportunity for more pulses in savoury snacks

Figure 7: Behaviours related to eating crisps, savoury snacks and nuts, November 2020

**BUY THIS  
REPORT NOW**

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Premium varieties well placed to add value to the market

Most people open to being swayed by healthier options

Figure 8: Attitudes towards crisps, savoury snacks and nuts, November 2020

## Issues and Insights

COVID-19 increases importance of targeting in-home consumption

People snacking at home more during COVID-19

Demand for on-the-go snacking dampened by COVID-19

More remote working and snacking at home expected long term

Kids' lunchbox occasion hit by school closures

Focus on healthy eating presents a challenge and opportunities

COVID-19 increases spotlight on health

People cutting back on crisps/crisp-style snacks a threat to sales

Government plans restrictions on promotions of HFSS foods

Better-for-you variants have permission to play in the category

Opportunity for more pulses in savoury snacks

Highlighting different usage occasions will help to support sales

Evening snacking continues to warrant attention

Daytime snacking holds further potential for nuts and popcorn

Lunch pairings a good way of encouraging more eating

Marketing and merchandising should leverage eating with alcohol occasion

Suitability for dipping worth emphasising

Flavour innovation central to keeping users engaged with brands

World cuisine flavours have strong appeal

Constant newness keeps four in 10 buyers buying

Keeping their finger on latest flavour trends important

Premium varieties well placed to add value to the market

Spotlight on health also highlights potential for premium segment

## The Market – Key Takeaways

More snacking during first lockdown boosts 2020 sales

Larger formats gain at the expense of single packs

Gradual re-emergence of snacking out of home expected

Snacking firmly entrenched in British eating habits

Kids' snacking helps drive sales

Strong interest in healthy eating

Government emphasis on health intensifies under COVID-19

Decline projected in most frequent core younger eaters

## Market Size and Forecast

More snacking at home helps drive sales of savoury snacks

**BUY THIS  
REPORT NOW**

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 9: Short-, medium- and long-term impact of COVID-19 on crisps, savoury snacks and nuts, 3 February 2021

More snacking during first lockdown boosts 2020 sales

Figure 10: UK retail value and volume sales of crisps, savoury snacks and nuts, 2015-25 (prepared on 3 February 2021)

Easing restrictions will dent volumes in 2021, modest growth ahead

Figure 11: Forecast of UK retail value sales of crisps, savoury snacks and nuts, 2015-25

Figure 12: Forecast of UK retail volume sales of crisps, savoury snacks and nuts, 2015-25

Market drivers and assumptions

Figure 13: Key drivers affecting Mintel's market forecast, 2015-2025 (prepared on 3 February 2021)

Learnings from the last recession

Figure 14: Growth in value and volume retail sales of crisps, savoury snacks and nuts, 2008-12

## Market Segmentation

Potato-based and other snacks show further growth

Figure 15: UK retail value sales of crisps, savoury snacks and nuts, by segment, 2015-20

Figure 16: UK retail volume sales of crisps, savoury snacks and nuts, by segment, 2015-20

Potato crisps return to growth in 2020

Baked snacks show modest growth

Popcorn sales boosted by more evenings in

Meat snacks benefit from more snacking at home

Nuts benefit from strong nutrition credentials

Figure 17: UK retail value and volume sales of nuts, by sub-segment, 2018-20

## Market Drivers

January 2021 lockdowns will mean more snacking at home again

Snacking firmly entrenched in British eating habits

68% of people who snack do so at least daily

Majority eat a wide variety of snacks

Figure 18: Repertoire of types of snacks eaten, March 2020

Kids' snacking also helps drive sales

Strong interest in healthy eating

COVID-19 increases spotlight on health

Government emphasis on health intensifies under COVID-19

Decline projected in most frequent core younger eaters

Figure 19: Trends in the age structure of the UK population, 2015-25

Income squeeze will hit discretionary spend

Brexit trade deal means minimal impact on crisps and savoury snacks

## Companies and Brands – Key Takeaways

Walkers extends its lead in crisps segment

Pringles leads growth in sales of other savoury snacks

Flavour innovation a major theme in NPD

BUY THIS  
REPORT NOW

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

- Different levels of spice intensity being explored
- Format diversification a feature of brand extensions
- Better-for-you snacks look to tap healthy eating trend
- High/added fibre and protein messages continue to be pushed
- Dip in advertising spending during COVID-19 pandemic
- Walkers in strong position as most trusted brand

## Market Share

### Walkers extends its lead in crisps segment

Figure 20: Leading brands' sales and shares in the UK crisps retail market, by value and volume, 2018/19 and 2019/20

### Pringles leads growth in sales of other savoury snacks

Figure 21: Leading brands' sales and shares in the UK potato-based, baked and other snacks market, by value and volume, 2018/19 and 2019/20

### Butterkist drives most of the growth in popcorn

Figure 22: Leading brands' sales and shares in the UK popcorn market, by value and volume, 2018/19 and 2019/20

### Sales of nuts dominated by own-label

Figure 23: Leading brands' sales and shares in the UK nuts market, by value and volume, 2018/19 and 2019/20

### Strong year for branded and own-label meat snacks

Figure 24: Leading brands' sales and shares in the UK meat snacks market, by value and volume, 2018/19 and 2019/20

## Launch Activity and Innovation

### Flavour innovation a major theme in NPD

#### Walkers ties up with restaurant chains for Taste Icons range

Figure 25: Walkers' new Taste Icons range, 2020

#### Different levels of spice intensity being explored

Figure 26: Examples of ranges featuring spicy flavours, 2020

#### Christmas flavours another feature of NPD

Figure 27: Launch of Christmas flavours in crisps and savoury snacks, 2020

#### Format diversification a feature of brand extensions

Figure 28: Launch of new formats and sizes in crisps and savoury snacks, 2020

#### Meat snack brands extend with bars

#### Better-for-you snacks look to tap healthy eating trend

#### Exponent looks to build a better-for-you powerhouse

#### Snacks made with pulses see more launches

Figure 29: Examples of launches in crisps and savoury snacks featuring chickpeas, 2020

#### Popped and baked snacks continue to feature strongly

Figure 30: Examples of baked launches in crisps and savoury snacks, 2020

Figure 31: Examples of popped launches in crisps and savoury snacks, 2020

#### High/added fibre and protein messages continue to be pushed

Figure 32: Proportion of new launches in crisps, savoury snacks and nuts market making high/added fibre and high/added protein claims, 2016-20

Figure 33: Examples of launches in crisps and savoury snacks making high/added protein claims, 2020/21

Figure 34: Examples of launches in crisps, savoury snacks and nuts making high/added fibre claims, 2020/21

**BUY THIS  
REPORT NOW**

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Vegan claims increase on the back of plant-based trend

Figure 35: Proportion of new launches in crisps, savoury snacks and nuts market making vegetarian and vegan/no animal ingredients claims, 2016-20

Figure 36: Examples of launches in crisps and savoury snacks making vegan/no animal ingredients claims, 2020

## Premium launches and references to provenance look to add value

Figure 37: Examples of premium launches in crisps, savoury snacks and nuts, 2020

## Product refreshes also an important part of launch activity

## Advertising and Marketing Activity

### Dip in advertising spending during COVID-19 pandemic

Figure 38: Total above-the line, online display and direct mail advertising expenditure on crisps, savoury snacks and nuts\*, by media type, 2017-20

### Three advertisers dominate spending

Figure 39: Total above-the line, online display and direct mail advertising expenditure on crisps, savoury snacks and nuts\*, by advertiser, 2019 and 2020

### Walkers Max leads spending by Walkers

Figure 40: Total above-the line, online display and direct mail advertising expenditure on crisps, savoury snacks and nuts, by brand, 2020

### Walkers supports new flavour launches

### Taste Icons range featured two-for-one meal offers

### Sausage Roll flavour supports food bank charity

### Walkers Max promotes flavour, heat and crunch

### Brands look to tap healthier New Year eating

### Walkers Oven Bake promoted as simple swap

### Hula Hoops Puft targets healthier snacking

### New formats receive strong advertising support

### Doritos Stax highlights distinctive triangular packaging

### Wotsits returns to TV screens with tongue-in-cheek advert for new Giants

### McCoy's promotes strength of Muchos corn chips

### Sharing occasions a big theme in premium snacks

### Tyrrells promotes provenance, heritage and snacking experience

### Kettle heroes its role for special occasions

### Propercorn makes TV debut with animated campaign

### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 41: Attitudes towards and usage of selected brands, December 2020

### Key brand metrics

Figure 42: Key metrics for selected brands, December 2020

### Brand attitudes: Walkers the most trusted brand

Figure 43: Attitudes, by brand, December 2020

### Brand personality: Pringles seen as being the most fun brand

Figure 44: Brand personality – Macro image, December 2020

### Walkers seen as the most traditional brand

**BUY THIS  
REPORT NOW**

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 45: Brand personality – Micro image, December 2020

## Brand analysis

Walkers stands for consistently high quality

Figure 46: User profile of Walkers, December 2020

Doritos seen as the most cool brand

Figure 47: User profile of Doritos, December 2020

Pringles has shared strongest family brand and delicious image

Figure 48: User profile of Pringles, December 2020

Kettle more associated with being indulgent or special than other brands

Figure 49: User profile of Kettle, December 2020

Being delicious and indulgent relative strengths for McCoy's

Figure 50: User profile of McCoy's, December 2020

KP Nuts has higher proportion of lapsed users than most

Figure 51: User profile of KP Nuts, December 2020

Hula Hoops a good value, family and fun brand

Figure 52: User profile of Hula Hoops, December 2020

popchips the brand most seen as healthy

Figure 53: User profile of popchips, December 2020

## The Consumer – Key Takeaways

More than nine in 10 eat crisps, savoury snacks and nuts

Crisps/crisp-style snacks have most frequent usage

Snacking the primary driver of usage

Daytime snacking holds further potential for nuts and popcorn

Strong interest in products featuring world cuisines

Alcoholic drinks and dips pairings hold more potential

Opportunity for more pulses in savoury snacks

Premium varieties well placed to add value to the market

Most people open to being swayed by healthier options

## Impact of COVID-19 on Consumer Behaviour

People snacking at home more during COVID-19

Demand for on-the-go snacking dampened by COVID-19

More remote working and snacking at home expected long term

Kids' lunchbox occasion hit by school closures

Pandemic increases focus on health

Figure 54: Changes in eating healthily as a priority since the COVID-19 outbreak, by gender and age, 2-11 November 2020

COVID-19 pandemic expected to heighten focus on sustainability

Figure 55: Changes in the environment being seen as a priority since the COVID-19 outbreak, by gender and age, 2-11 November 2020

Changes to shopping behaviour favour well-known brands

Figure 56: Selected behaviour changes since the COVID-19/coronavirus outbreak, December 2020 and January 2021

**BUY THIS  
REPORT NOW**

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

# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Usage of Crisps, Savoury Snacks and Nuts

More than nine in 10 eat crisps, savoury snacks and nuts

Figure 57: Number of different types of crisps, savoury snacks and nuts eaten in the last 3 months, November 2020

Three quarters eat potato crisps

Figure 58: Types of crisps/crisp-style snacks eaten in the last 3 months, October 2019 and November 2020

Nuts eaten by half of consumers

Figure 59: Types of nuts eaten in the last 3 months, November 2020

Three in 10 consumers eat popcorn

Figure 60: Types of other savoury snacks eaten in the last 3 months, November 2020

Baked snacks the most popular better-for-you snack

Figure 61: Types of snacks eaten in the last 3 months, November 2020

## Frequency of Eating Crisps, Savoury Snacks and Nuts

Crisps/crisp-style snacks have most frequent usage

Figure 62: Frequency of eating crisps, savoury snacks and nuts, November 2020

Frequency of nut usage increases

## Occasions for Eating Crisps, Savoury Snacks and Nuts

Snacking the primary driver of usage

Crisps and crisp-style snacks lag behind competitors in evenings

Figure 63: Occasions when crisps, savoury snacks and nuts eaten in the last 3 months, November 2020

Daytime snacking holds further potential for nuts and popcorn

Figure 64: Savoury snacks aligning with key snack needs and occasions, 2020

Variations by age on when people are most likely to snack

Lunches important for crisps and meat snacks

## Behaviours Related to Eating Crisps, Savoury Snacks and Nuts

Strong interest in products featuring world cuisines

Figure 65: Behaviours related to eating crisps, savoury snacks and nuts, November 2020

Alcoholic drinks and dips pairings hold more potential

Marketing and merchandising should leverage eating with alcohol occasion

Suitability for dipping worth emphasising

Opportunity for more pulses in savoury snacks

## Attitudes towards Crisps, Savoury Snacks and Nuts

Premium varieties well placed to add value to the market

Figure 66: Attitudes towards crisps, savoury snacks and nuts, November 2020

Crisps/crisp-style snacks have an edge over sugary snacks on health perceptions

Displaying calories will appeal to one in three

Better-for-you variants have permission to play in the category

Consumers want re-sealable packaging

**BUY THIS  
REPORT NOW**

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



# Crisps, Savoury Snacks and Nuts - UK - February 2021

Report Price: £1995.00 | \$2693.85 | €2245.17

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

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

## Appendix – Market Size and Forecast

Forecast methodology

Figure 67: Total UK retail value sales of crisps, savoury snacks and nuts, best- and worst-case forecast, 2019-24

Figure 68: Total UK retail volume sales of crisps, savoury snacks and nuts, best- and worst-case forecast, 2019-24

## Appendix – Market Share

Figure 69: Leading manufacturers' sales and shares in the UK crisps market, by value and volume, 2018/19 and 2019/20

Figure 70: Leading manufacturers' sales and shares in the UK potato-based, baked and other snacks market, by value and volume, 2018/19 and 2019/20

Figure 71: Leading manufacturers' sales and shares in the UK popcorn market, by value and volume, 2018/19 and 2019/20

Figure 72: Leading manufacturers' sales and shares in the UK nuts market, by value and volume, 2018/19 and 2019/20

Figure 73: Leading manufacturers' sales and shares in the UK meat snacks market, by value and volume, 2018/19 and 2019/20

## Appendix – Launch Activity and Innovation

Figure 74: Share of product launches in the UK crisps, savoury snacks and nuts market, by sub-segment, 2016-20 (sorted by 2020)

Figure 75: Share of product launches in the UK crisps, savoury snacks and nuts market, by claim, 2016-20 (sorted by 2020)

**BUY THIS  
REPORT NOW**

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