

Savoury Biscuits - UK - March 2019

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.



“The dependency on evening snacking for usage has left savoury biscuits vulnerable to competition from other snacks vying for the same occasion. Inspiring people to explore toppings other than cheese and to use savoury biscuits in different ways is needed to build usage for other meal occasions.”

– **Anita Winther, Research Analyst**

This report looks at the following areas:

- **Spotlight on fibre is an opportunity the category needs to harness**
- **Pushing more variation in toppings is needed to unlock more occasions**
- **Convenience warrants attention for category to tap on-the-go consumption**

Volume sales of savoury biscuits have declined by 3% over 2013-18. Their primary role as a snack has left the category vulnerable to ever-growing competition from a wealth of different sweet and savoury snack options. Marketing and NPD (New Product Development) activity have looked to tackle this threat and buoy sales by encouraging usage of savoury biscuits for other occasions, notably lunch and afternoon snacking. However, the category remains heavily reliant on evening snacking and the activity is yet to reverse the downwards volume trend.

Inspiring people to explore other toppings than cheese will likely be key for the category to grow usage beyond the evening occasion. However, as adventurous suggestions are already widely available on websites, putting this type of inspiration directly into the path of consumers looks to be needed to disrupt their habits – in marketing or through in-store activity. Meanwhile, exploring convenient formats will be needed for savoury biscuits to tap into the growth of out-of-home consumption.

**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

Savoury Biscuits - UK - March 2019

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

- What you need to know
- Products covered in this Report

Executive Summary

- The market
- Volumes fall for savoury biscuits
- Downwards volume trend will continue
 - Figure 1: Forecast of UK retail value sales of savoury biscuits, 2013-23
- PHE focuses on calories
- Health benefits of fibre capture headlines
- Mounting pressure for improved sustainability of packaging
- Companies and brands
- Own-label wins, leading brands see sales slump
- Gluten-free brands defy category trend
 - Figure 2: Leading brands' shares of value sales in the UK savoury biscuits market, 2018*
- Protein and pulse trends embraced by savoury biscuits
- Seeds and ancient grains remain NPD trends
- Above-the-line support is cut
- Ryvita teams up with Davina McCall
- Quality, accessibility and trust underpin Jacob's lead
 - Figure 3: Attitudes towards and usage of selected brands, February 2019
- The consumer
- Affluent consumers are key users
- 25-34 year olds have highest frequencies
 - Figure 4: Frequency of eating types of savoury biscuits, December 2018
- The evening is key eating occasion
- Morning occasions lag behind
 - Figure 5: When savoury biscuits are eaten, December 2018
- Cheese is top pairing
- Category needs to encourage greater topping creativity
 - Figure 6: How savoury biscuits are eaten, December 2018
- Alcohol pairings attract interest
 - Figure 7: Behaviours relating to savoury biscuits, December 2018
- Healthier image of savoury biscuits is well established
 - Figure 8: Attitudes towards savoury biscuits, December 2018
- Savoury biscuit shoppers are price-driven
- Resealability could boost use for snack occasions

**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

Savoury Biscuits - UK - March 2019

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: Important choice factors when buying savoury biscuits, December 2018

Health-boosting herbs and spices garner interest

Filled sandwich biscuits can unlock on-the-go consumption

Figure 10: Interest in savoury biscuits product concepts, December 2018

What we think

Issues and Insights

Spotlight on fibre is an opportunity the category needs to harness

The facts

The implications

Pushing more variation in toppings is needed to unlock more occasions

The facts

The implications

Convenience warrants attention for category to tap on-the-go consumption

The facts

The implications

The Market – What You Need to Know

Volumes fall for savoury biscuits

Downwards volume trend will continue

PHE focuses on calories

Health benefits of fibre capture headlines

Mounting pressure for improved sustainability of packaging

Market Size and Forecast

Savoury biscuit volume sales fall

Competition is fierce for snack occasions

Efforts to branch out to lunch continue

Inflation supports values

Figure 11: UK retail value and volume sales of savoury biscuits, 2013-23

The future

Figure 12: Forecast of UK retail value sales of savoury biscuits, 2013-23

Figure 13: Forecast of UK retail volume sales of savoury biscuits, 2013-23

Forecast methodology

Market Drivers

Reducing obesity levels remains high on the agenda

Sugar remains in the spotlight

PHE launches calorie advice

Savoury biscuits challenged to reduce calories by 20%

Salt reduction target missed by savoury biscuits

The benefits of fibre hit the headlines

**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

Savoury Biscuits - UK - March 2019

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.

Focus on gut health should benefit high-fibre foods

Advertising can boost the appeal of high-fibre savoury biscuits

Figure 14: Nairn's 21 Day Challenge, 2019

Gluten-free market continues to grow

Plastic packaging waste is in the spotlight

Mounting pressure on manufacturers to improve the green credentials of their packaging

Pladis signs up to UK Plastic Pact

Brexit uncertainty continues

A squeeze on incomes could push savoury biscuits out of purchasing repertoires

Companies and Brands – What You Need to Know

Own-label wins, leading brands see sales slump

Gluten-free brands defy category trend

Protein and pulse trends embraced by savoury biscuits

Seeds and ancient grains remain NPD trends

Above-the-line support is cut

Ryvita teams up with Davina McCall

Quality, accessibility and trust underpin Jacob's lead

Market Share

Own-label is the big winner

Jacob's and Ryvita see sales shrink

Figure 15: Leading brands' sales and shares in the UK savoury biscuits market, by value and volume, 2017 and 2018

Gluten-free brands buck trend

Snack a Jacks repack puts emphasis on health credentials

Launch Activity and Innovation

Relaunches grow share in 2018

Figure 16: Share of new product launches in the UK savoury biscuits market, by launch type, 2014-18

Figure 17: Ryvita and Jacob's packaging relaunches, 2018 and 2019

Savoury biscuit brands embrace protein trend

Figure 18: Ryvita Protein launch, 2018

Operators spotlight pulses for protein halo

Figure 19: Savoury biscuit launches featuring lentils or chickpeas, 2018

Vegetables get a starring role in savoury biscuits

Figure 20: Savoury biscuit launches featuring vegetables, 2017 and 2019

Seeds remain a popular ingredient

Figure 21: Share of new product launches in the UK savoury biscuits market with seeds in the ingredients, 2014-18

Operators explore alternative grains

Figure 22: Savoury biscuit launches featuring ancient grains, 2017-19

Jacob's launches sourdough option

**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

Savoury Biscuits - UK - March 2019

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.

Smaller brands explore sprouting

Oat and rye feature in new formats

Figure 23: Savoury biscuit launches featuring sourdough, sprouted grains or grains used in new formats, 2017 and 2018

Bites formats blur the line with savoury snacks

Marmite makes breakfast biscuit debut

Chilli continues to inspire flavour launches

Figure 24: Flavour innovations in savoury biscuits, 2017 and 2018

Iceland rolls out palm oil-free variants

Figure 25: Iceland palm oil-free cracker launch, 2018

Advertising and Marketing Activity

Category cuts spend through traditional advertising channels

Figure 26: Total above-the-line, online display and direct mail advertising expenditure on crackers, crispbread and breadsticks, 2014-18

Ryvita is main brand driving category visibility

Figure 27: Ryvita's social media activity with Davina McCall, January and February 2019

Ryvita teams up with Cancer Research UK

Figure 28: Total above-the-line, online display and direct mail advertising expenditure on crackers, crispbread and breadsticks, by top 10 advertisers, 2014-18

Nairn's looks to improve the nation's mood and gut health

Figure 29: Nairn's 'Good Gut Feeling' campaign, 2018

Figure 30: Nairn's 'Good Food Mood' campaign, 2018

Kallo encourages swaps to lighter options

Figure 31: Kallo's 'Snack Swap' campaign and Get The Gloss sponsored content, 2018

Peter's Yard highlights natural and lighter credentials

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 32: Attitudes towards and usage of selected brands, February 2019

Key brand metrics

Figure 33: Key metrics for selected brands, February 2019

Brand attitudes: Jacob's enjoys lead in trust, quality and value perceptions

Figure 34: Attitudes, by brand, February 2019

Brand personality: Ritz is seen as fun and accessible

Figure 35: Brand personality – macro image, February 2019

Ryvita enjoys image as healthy and natural

Figure 36: Brand personality – micro image, February 2019

Brand analysis

Jacob's lead is cemented in quality, accessibility and trust

Figure 37: User profile of Jacob's, February 2019

Ritz is seen as fun and indulgent, but struggles on health

Figure 38: User profile of Ritz, February 2019

**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

Savoury Biscuits - UK - March 2019

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.

Nairn's brand image curtailed by limited experience

Figure 39: User profile of Nairn's, February 2019

Ryvita stands out as healthy and natural

Figure 40: User profile of Ryvita, February 2019

Snack a Jacks is seen as fun and accessible

Figure 41: User profile of Snack a Jacks, February 2019

The Consumer – What You Need to Know

Affluent consumers are key users

25-34 year olds have highest frequencies

The evening is key eating occasion

Morning occasions lag behind

Cheese is top pairing

Category needs to encourage greater topping creativity

Alcohol pairings attract interest

Healthier image of savoury biscuits is well established

Savoury biscuit shoppers are price-driven

Resealability could boost use for snack occasions

Health-boosting herbs and spices garner interest

Filled sandwich biscuits can unlock on-the-go consumption

Frequency of Eating Savoury Biscuits

Most Brits eat savoury biscuits

Affluent consumers are key users

Figure 42: Repertoire of types of savoury biscuits eaten, December 2018

Plain crackers are most popular type

Oatcakes and rice cakes trail behind

Figure 43: Frequency of eating types of savoury biscuits, December 2018

Low frequencies are a challenge to spur growth

25-34 year olds have highest frequencies

When Savoury Biscuits are Eaten

Usage occasions are limited

The evening is key eating occasion

Sweet toppings should increase evening use among the young

Figure 44: When savoury biscuits are eaten, December 2018

Afternoon snacking is key occasion for young women

Morning occasions lag behind

Breakfast- and brunch-oriented suggestions for toppings can help boost usage

More convenience-led NPD is needed

How Savoury Biscuits are Eaten

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

Savoury Biscuits - UK - March 2019

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.

Cheese is top pairing

Advice for cheese pairings garners interest

Specific on-pack advice is rare

Figure 45: Examples of on-pack cheese pairing advice on UK savoury biscuit launches, 2017 and 2018

Figure 46: How savoury biscuits are eaten, December 2018

NPD helps support un-topped snacking

Pushing more topping creativity is needed to unlock more occasions

Heated biscuit suggestions have potential

Behaviours Relating to Savoury Biscuits

Interest in beans and pulses extends to savoury biscuits

Figure 47: Behaviours relating to savoury biscuits, December 2018

Alcohol pairings attract interest

Figure 48: Examples of on-pack drinks pairing advice on UK savoury biscuit launches, 2018 and 2019

Attitudes towards Savoury Biscuits

Healthier image of savoury biscuits is well established

Figure 49: Attitudes towards savoury biscuits, December 2018

Seeds spark interest

Purchase Factors for Savoury Biscuits

Savoury biscuit shoppers are price-driven

Figure 50: Important choice factors when buying savoury biscuits, December 2018

Taste and excitement also drive purchase intent

Figure 51: How branded and own-label savoury biscuits score on the top four attributes correlating to purchase intent in the category, April 2018-February 2019

Over-45s are most brand-loyal

Naturalness holds sway

Figure 52: Examples of transparent ingredients lists, 2017 and 2018

Resealability can help drive up use for snacking occasions

Interest in Savoury Biscuit Concepts

Health-boosting herbs and spices garner interest

Figure 53: Examples of turmeric and ginger flavours in savoury biscuit launches, 2014 and 2017

Scope to spotlight spices in world cuisine flavours

Figure 54: Interest in savoury biscuits product concepts, December 2018

Filled sandwich biscuits can unlock on-the-go consumption

Figure 55: Wasa Sandwich filled crispbreads, 2017 and 2018

Gut health messages resonate in category

Scope for retailers to bake savoury biscuits fresh in-store

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

**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

Savoury Biscuits - UK - March 2019

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 – Market Size and Forecast

Figure 56: Total UK retail value sales of savoury biscuits, best- and worst-case forecast, 2018-23

Figure 57: Total UK retail volume sales of savoury biscuits, best- and worst-case forecast, 2018-23

Forecast methodology

Appendix – Market Share

Figure 58: Leading manufacturers' sales and shares in the UK savoury biscuits market, by value and volume, 2017 and 2018

Appendix – Launch Activity and Innovation

Figure 59: Share of new product launches in the UK savoury biscuits market, by top 10 companies (sorted by 2018), 2014-18

Figure 60: Share of new product launches in the UK savoury biscuits market, by top 10 claims, 2014-18

Figure 61: Share of new product launches in the UK savoury biscuits market, by top 15 flavour components, 2014-18

**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