

Potato and Tortilla Chips - US - January 2021

Report Price: £3695 | \$4995 | €4400

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:

- The impact of the COVID-19 pandemic on consumer behavior and the potato and tortilla chip market.
- The impact of past recessions on chip sales and consumption.
- Motivations for choosing chips.
- Perceptions by chip type.



"Increased meals and snacking taking place at home not only gave rise to an already flourishing chips category, 2020 reinforced some of the category's fundamental strengths. Chips are an anchor of the increasingly competitive snack market, not only a dominating sales force, but also delivering on the primary need state – satisfying cravings."

- Kaitlin Kamp, Food and

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

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

EXECUTIVE SUMMARY

- **Top takeaways**
- **Market overview**
Figure 1: Total US sales and forecast of potato and tortilla chips, at current prices, 2015-25
Figure 2: Total US sales and forecast of potato and tortilla chips, at current prices, 2015-25
- **Impact of COVID-19 on potato and tortilla chips**
Figure 3: Short-, medium- and long-term impact of COVID-19 on potato and tortilla chips, July 2020
- **Opportunities and challenges**
- **Re-emergence**
Figure 4: Chip consumption frequency, November 2020
- **Premium ingredients can elevate quality and BFY profile**
Figure 5: Chip innovation that motivates trial, November 2020
- **Recovery**
Figure 6: Chip motivations, November 2020
- **Expand online outreach**

THE MARKET – KEY TAKEAWAYS

- **At-home snacking boosts chip sales**
- **Tortilla chips slowly gain market share**
- **Everyone wants a share of the snack market**
- **Health concerns are underway**
- **Remind consumers that chips are fun**
- **Tell a BFY story through quality positioning**

MARKET SIZE AND FORECAST

- **Chip sales get a lift from COVID-19**
Figure 7: Total US sales and forecast of potato and tortilla chips, at current prices, 2015-25
Figure 8: Total US sales and forecast of market, at current prices, 2015-25
- **Impact of COVID-19 on potato and tortilla chips**

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

Potato and Tortilla Chips - US - January 2021



Report Price: £3695 | \$4995 | €4400

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 potato and tortilla chips, July 2020

- **Lockdown**
- **Re-emergence**
- **Recovery**
- **COVID-19: US context**
- **Learnings from the last recession**

Figure 10: Total U.S. sales and forecast of tortilla and potato chips, at current prices, 2006-12

SEGMENT PERFORMANCE

- **Tortilla “chips away” at potato’s share**

Figure 11: Total US retail sales and forecast of potato and tortilla chips, by segment, at current prices, 2015-25

Figure 12: Total US retail sales of potato and tortilla chips, by segment, at current prices, 2018 and 2020

- **Supermarkets maintain dominance**

Figure 13: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2018 and 2020

MARKET FACTORS

- **How many snacks are too many snacks?**

Figure 14: Snack associations, January 2020

- **Increased focus on wellbeing should guide portfolio development**

Figure 15: Foods limited in diet, August 2020

- **Alternative vegetable-based chips have a small audience, so far**

Figure 16: Other vegetable-based chips

Figure 17: product launches by snack segment, % change of total launches, November 2019-2020

- **Waning households with children make a case for premium options**

Figure 18: Households, by presence of related children, 2009-19

MARKET OPPORTUNITIES

- **Extend the fun beyond the party**

Figure 19: Chip product and marketing examples

- **Use quality cues to connect with consumers looking for healthy indulgences**

Figure 20: Chips with BFY or premium positioning

- **Packaging improvements are overdue**

Figure 21: Chip products with packaging improvements

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

Report Price: £3695 | \$4995 | €4400

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

- **Revive sampling through DTC**

Figure 22: DTC chip and snack models

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Increased sales leaves category pecking order unchanged**
- **Brands open the flavor floodgates**
- **snacks.com changes channel game**

MARKET SHARE

- **PepsiCo continues to dominate the market**

Figure 23: Multi-outlet sales of potato and tortilla chips, by leading companies, rolling 52 weeks 2019 and 2020

- **Brand power remains strong**

Figure 24: Private label chips with adventurous ingredients and flavors

COMPETITIVE STRATEGIES

- **Fun is where the flavor is**

Figure 25: Chips with unique flavors

Figure 26: Chip flavor marketing

- **Hot take: bring the heat**

Figure 27: Chips with spicy flavors

- **Grain innovation gains traction**

Figure 28: Grain-free and ancient-grain chips

- **PepsiCo takes its chips online**

THE CONSUMER – KEY TAKEAWAYS

- **Don't underestimate the classics**
- **Opportunity to boost consumption frequency**
- **Craveability more important than occasions**
- **Connect the dots between cravings and emotional drivers**
- **Health is a secondary consideration**
- **Three in ten increased chip consumption during COVID-19**
- **Consumers are open to small, BFY improvements**

CHIP CONSUMPTION

- **The classics remain the most consumed**

Figure 29: Chip consumption, repertoire, November 2020

- **Younger consumers more drawn to flavorful, BFY varieties**

Figure 30: Chip consumption, by age, November 2020

- **Parents consume a wider variety of chips**

Figure 31: Chip consumption, repertoire, by parental status, November 2020

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.

CONSUMPTION BY PACKAGING SIZE/TYPE

- **Sharing concerns haven't dented the popularity of big bags**
Figure 32: Consumption by packaging size/type, November 2020
- **Versatility and portion control can extend the benefits of single-serving bags to all household sizes**
Figure 33: Chip consumption by packaging size/type, by household size, November 2020

CHIP CONSUMPTION FREQUENCY

- **A strong share of infrequent users points to opportunity**
Figure 34: Chip consumption frequency, November 2020
- **Young men are the heaviest chip users**
Figure 35: Chip consumption frequency, November 2020

CHIP CONSUMPTION DRIVERS

- **The strongest chip motivators impervious to COVID-19**
Figure 36: Chip motivations, November 2020
- **Young women motivated by fun, young men by function**
Figure 37: Chip motivations, by age and gender, November 2020

CHIP ASSOCIATIONS

- **Embrace cravings to strengthen emotional connections**
Figure 38: Correspondence Analysis – Symmetrical map – associations by chip type, November 2020
Figure 39: Chip associations, November 2020
- **Tortilla chips can tap into BFY solo snacking**
Figure 40: Chip associations, November 2020
- **Position popped chips for kids**
Figure 41: Chip associations, popped chips, by parental status, November 2020

CHIP ATTITUDES

- **BFY innovation remains an opportunity for some**
- **Consider a new sampling experience**
Figure 42: Chip Attitudes, November 2020
- **Chips are losing out in health and fun among light users**
Figure 43: Crosstab chip attitudes by chip frequency, November 2020
- **Eco-friendly packaging could inspire young adults to grab chips more frequently**
Figure 44: Chip attitudes, by age, November 2020

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.

CHIP BEHAVIORS

- **Consumers are game for both the new and familiar**
Figure 45: Chip behaviors, November 2020
- **Consumers double down on chips during COVID-19**
Figure 46: Crosstab chip behaviors by chip consumption frequency, November 2020
- **Younger consumers open to flavor experiences**
Figure 47: Crosstab chip behaviors, by age, November 2020

CHIP INNOVATION THAT MOTIVATES TRIAL

- **Make BFY improvements, not replacements**
Figure 48: Chip innovation that motivates trial, November 2020
- **Parents are keeping health in mind**
Figure 49: Chip innovation that motivates trial, by parental status, November 2020

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Sales data**
- **Forecast**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**

APPENDIX – THE MARKET

Figure 50: Total US retail sales and forecast of potato and tortilla chips, at inflation-adjusted prices, 2015-25
Figure 51: Average household spending on potato and tortilla chips, by segment, 2015-20
Figure 52: Total US retail sales and forecast of potato chips, at current prices, 2015-25
Figure 53: Total US retail sales and forecast of potato chips, at inflation-adjusted prices, 2015-25
Figure 54: Total US retail sales and forecast of tortilla chips, at current prices, 2015-25
Figure 55: Total US retail sales and forecast of tortilla chips, at inflation-adjusted prices, 2015-25

APPENDIX – RETAIL CHANNELS

Figure 56: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2015-20
Figure 57: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2018 and 2020

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

Potato and Tortilla Chips - US - January 2021



Report Price: £3695 | \$4995 | €4400

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

Figure 58: US supermarket sales of potato and tortilla chips, at current prices, 2015-20

Figure 59: US convenience store sales of potato and tortilla chips, at current prices, 2015-20

Figure 60: US sales of potato and tortilla chips through other retail channels, at current prices, 2015-20

APPENDIX – BRANDS AND COMPANIES

Figure 61: Multi-outlet sales of potato chips, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 62: Multi-outlet sales of tortilla chips, by leading companies and brands, rolling 52 weeks 2019 and 2020

CORRESPONDENCE ANALYSIS – POTATO AND TORTILLA CHIPS – JANUARY 2021

Figure 63: Correspondence Analysis – Symmetrical map – associations by chip type, November 2020

Figure 64: Correspondence Analysis – Principal map – associations by chip type, November 2020

- **Methodology**

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)**.