

Potato and Tortilla Chips - US - 2022

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This report looks at the following areas:

- Chips consumed and increased frequency
- Key drivers of chip purchase
- Interest in chip innovation
- Attitudes toward potato and tortilla chips

Chips brands have long relied upon flavor innovation to distinguish themselves from competitors, often focused on hotter and spicier options. Yet spicy innovation is just one way to reach consumers, and heat has its limitations. Chip flavor is the primary driver of choice, yet there is a strong tendency to favor the familiar, comforting flavors that consumers remember from their youth. The actual level of interest in spicy chips is a fairly low 38%. Bolder flavors may be good at attracting trial purchase, but familiar flavors are the ones that consumers return to time and again.

One consequence of COVID for the chips category has been the exposure of just how engrained the category's usage occasions are, as well as a general unwillingness among consumers to turn to potato chips for many dayparts other than lunch. This may well point to opportunity for the category, however, as brands that can encourage usage of potato (and tortilla) chips for the lunch occasions should have a sizable audience to attract, considering there will continue to be a greater portion of consumers working from home post-COVID.

Flavored chips (both tortilla and potato) are commonly used snacks, but a host of healthier options are vying for the snack consumer, whether it's fruit and vegetables or more-processed foods that are nevertheless staking a healthful claim around being plant-based. Chips have long had a reputation as a less-than-healthy indulgence driven by flavor, yet in a post-pandemic world, consumers are expected to place a greater emphasis on nutrition and health. As such, chips that can offer a healthier promise (not even "healthy" but simply healthier than other chip options) will be better positioned to meet the demands of that health-oriented consumer.



"Consumption of potato and tortilla chips is nearly universal, and the category saw an 8% increase in 2020. The next year will see sales correct and, by 2023, resume their pre-pandemic pace of slow but steady growth, fueled by interest in on-the-go snacking options and chips that can offer flavors that attune to consumers' sense of the familiar."

– Billy Roberts, Senior Analyst
– Food and Drink

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