

Potato and Tortilla Chips - US - 2022

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:

- 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

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
- This Report looks at the following areas
- Definition
- Market context
- COVID-19: US context
- Economic and other assumptions

EXECUTIVE SUMMARY

- Top takeaways
- Market overview
 - Figure 1: Total US sales and fan chart forecast of potato and tortilla chips, at current prices, 2016–26
 - Figure 2: Total US sales and forecast of market, at current prices, 2016–26
 - Figure 3: Potato chip and tortilla chip outlook, 2022–27
- Opportunities and challenges
- Health's role likely to increase post-pandemic
 - Figure 4: Healthy interest in chips, by age and gender, 2022
- Highlight the alignment of natural with healthy
 - Figure 5: Natural and health in chips, by age, 2022
 - Figure 6: Natural/organic and related claims on US chip introductions, 2016–21
- Optimize chips for on-the-go snacking
 - Figure 7: Chips for those on-the-go, by age, 2022
- Packaging refresh to meet value needs
 - Figure 8: Chip packaging upon purchase, by age, 2022

MARKET SIZE AND FORECAST

- Chip sales expected to reset after 2022 correction
 - Figure 9: Total US sales and fan chart forecast of potato and tortilla chips, at current prices, 2016–26
 - Figure 10: Total US sales and forecast of market, at current prices, 2016–26

SEGMENT PERFORMANCE

- Tortilla chips set the pace, as both chip segments grow
 - Figure 11: Sales of potato and tortilla chips, by segment, 2016–26
 - Figure 12: Total US retail sales and forecast of potato and tortilla chips, by segment, at current prices, 2016–26

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 - 2022

Report Price: £3695 | \$4995 | €4400

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



- **Consumer shift away from physical stores points to brand opportunity**

Figure 13: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2016-21

Figure 14: Total US market share of potato and tortilla chips, by channel, 2019-21

MARKET FACTORS

- **Economics will keep food spend at home**

Figure 15: Consumer Sentiment Index, 2019-21

- **eCommerce growth points to online opportunities**

Figure 16: Total US online sales and forecast of groceries, at current prices, 2015-25

- **Aging consumer base presents challenges for chips**

Figure 17: US population, by age, 2014-24

MARKET SHARE/KEY PLAYERS

- **PepsiCo increases market share, as Kellogg gains ground**

- **Sales of potato and tortilla chips, by company**

Figure 18: Multi-outlet sales of potato and tortilla chips, by leading companies, rolling 52 weeks 2020 and 2021

- **Flavors and natural options fuel potato chip growth among legacy brands**

Figure 19: Multi-outlet sales of potato chips, by leading companies and brands, rolling 52 weeks 2020 and 2021

- **Established brands maintain share in tortilla chips**

Figure 20: Multi-outlet sales of tortilla chips, by leading companies and brands, rolling 52 weeks 2020 and 2021

COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES

- **Play the game**

Figure 21: Brands speak to gamers via social media, 2022

Figure 22: Marketing with video games, 2022

- **Balancing bold with the familiar**

Figure 23: Flavor-focused chip introductions and messaging, 2022

- **Expand chip usage further into recipes**

Figure 24: Recipe ideas for expanding chip usage, 2022

- **Renew the connection with health through ingredients and novelty**

Figure 25: Natural and health in chips, 2022

Figure 26: Natural and free-from claims in US chip introductions, 2016-21

- **Healthier means better ingredients**

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 - 2022

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 27: Healthy interest in chips, 2022

- **Functionality is in the cards for chips**

Figure 28: Healthy interest in chips, 2022

- **Portable chip occasions still up for grabs**

Figure 29: on-the-go chip consumption, 2022

- **Packaging interest reflects value needs**

Figure 30: Chip packaging upon purchase, by age, 2022

THE POTATO AND TORTILLA CHIP CONSUMER – FAST FACTS

- **Chip fans:**
- **Flavor drives choice**
- **Seeking a healthier chip**
- **Chip habits ripe for disruption**

CHIPS CONSUMED

- **Increased consumption as classics hold ground**
Figure 31: Chips consumed, 2022
- **Room to grow engagement among young men**
Figure 32: Repertoire of chips consumed, by age, by gender, 2022
Figure 33: Chips consumed, by age, by gender, 2022
- **Healthy options appeal to parents**
Figure 34: Chips consumed, by parental status, 2022
- **Young adults dig in to increased chip consumption**
Figure 35: Growth in chip consumption, by age and gender, 2022
- **Parents drive increased chip consumption**
Figure 36: Growth in chip consumption, by parental status, 2022

CHIP PURCHASE FACTORS

- **A shift to contemporary health cues is needed**
Figure 37: Chip purchase factors, 2022
- **Specific health claims fall short of price, flavor**
Figure 38: Chip purchase factors, by parental status, 2022

CHIP CONSUMPTION OCCASIONS

- **Brands need to disrupt siloed occasions**
Figure 39: Correspondence Analysis – Symmetrical map – Chip consumption occasions, 2022
- **Dinner occasions are up for grabs**
Figure 40: Chips at meal occasions, by age, 2022
- **Room to grow tortilla chips' snacking occasions**
Figure 41: Tortilla chips at snacking occasions, by age, 2022

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 - 2022

Report Price: £3695 | \$4995 | €4400

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



INTEREST IN CHIP INNOVATION

- **Chip fans want premium, BFY options**
Figure 42: Interest in chip innovation, 2022
- **Under 55s are open to BFY chips**
Figure 43: Interest in healthy chip innovation, 2022
- **Expand the base of chips to include healthier ingredients**
Figure 44: Interest in chip innovation, by growth in chip consumption, 2021

CHIP BEHAVIORS

- **Shake up chip perceptions and habits**
Figure 45: Chip behaviors, 2022
- **Versatility points to opportunity among younger adults**
Figure 46: Chip behaviors, by age, 2022

CHIP ATTITUDES

- **Address consumer interest in chip ingredient origins**
Figure 47: Chip attitudes, 2022
- **Focus flavors on the familiar**
Figure 48: Attitudes about chip brand and flavor, by parental status, 2022
- **Target parents with healthier chips**
Figure 49: Attitudes about chips, by number of children in household, 2022
- **Packaging can lend value**
Figure 50: Attitudes about chips, by age, 2022

APPENDIX – DATA SOURCES AND ABBREVIATIONS

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

APPENDIX – THE MARKET

Figure 51: Total US sales and forecast of market, at current prices, 2016–26

Figure 52: Total US retail sales and forecast of potato and tortilla chips, at inflation-adjusted prices, 2016–26

Figure 53: Total US retail sales and forecast of potato and tortilla chips, by segment, at current prices, 2016–26

Figure 54: Total US retail sales of potato and tortilla chips, by segment, at current prices, 2019 and 2021

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 - 2022

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 55: Total US retail sales and forecast of potato chips, at current prices, 2016–26

Figure 56: Total US retail sales and forecast of potato chips, at inflation-adjusted prices, 2016–26

Figure 57: Total US retail sales and forecast of tortilla chips, at current prices, 2016–26

Figure 58: Total US retail sales and forecast of tortilla chips, at inflation-adjusted prices, 2016–26

APPENDIX – COMPANIES AND BRANDS

Figure 59: Multi-outlet sales of potato and tortilla chips, by leading companies, rolling 52 weeks 2020 and 2021

Figure 60: Multi-outlet sales of potato chips, by leading companies and brands, rolling 52 weeks 2020 and 2021

Figure 61: Multi-outlet sales of tortilla chips, by leading companies and brands, rolling 52 weeks 2020 and 2021

APPENDIX – CONSUMER

Figure 62: Average annual household spending on potato and tortilla chips, 2016–21

APPENDIX – RETAIL CHANNELS

Figure 63: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2016–21

Figure 64: Total US retail sales of potato and tortilla chips, by channel, at current prices, 2019 and 2021

Figure 65: US supermarket sales of potato and tortilla chips, at current prices, 2016–21

Figure 66: US convenience store sales of potato and tortilla chips, at current prices, 2016–21

Figure 67: US sales of potato and tortilla chips through other retail channels, at current prices, 2016–21

APPENDIX – CORRESPONDENCE ANALYSIS METHODOLOGY

Figure 68: Correspondence Analysis – Symmetrical map – Chip consumption occasions, 2022

Figure 69: Correspondence Analysis – Principal map – Chip consumption occasions, 2022

Figure 70: Correspondence chip consumption occasions, 2022

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)**.