

Salty Snacks - 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:

- The size, segmentation and key trends driving growth in the Salty Snacks market
- Competitive strategies, as seen in successful products across salty snack segments, and marketing opportunities, especially relative to core consumer groups
- Salty snack consumption, attitudes/behaviors and innovation

Interest in BFY options as well as more environmentally friendly products is driving innovation among fast-growing alternative salty snacks. While the pandemic continues to create uncertainty, long-term growth opportunities are strong, especially for more functional, sustainable snacks that can support holistic wellness.

The \$23.7 billion salty snack market continues to grow, increasing 9% in 2021 and enjoying high household penetration of 91%. At-home snacking has been strong during the pandemic, and convenient, single-serve packages support easy, hygienic consumption beyond the home.



"Snacking has remained strong in 2021. In pursuit of craveable, hunger-satiating treats, some turn to familiar tastes, while others, especially younger consumers, embrace innovation and spicy, international flavors."

Beth Bloom, Associate
 Director, US Food & Drink
 Reports

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
America	s +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
- · 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 salty snacks, at current prices, 2016-26

Figure 2: Category outlook, 2022-27

- Opportunities and challenges
- "Other" salty snacks growth shows opportunity in innovation Figure 3: Share of salty snack market dollar sales, by segment, 2019 and 2021
- Opportunity and challenge lie with fast-growing, nimble "other" suppliers
- Growth opportunity strongest in appealing to Millennials
 Figure 4: Salty snack consumption, by generation, 2021
- Many more marketing in-roads with younger consumers and parents

Figure 5: Reasons for salty snack consumption, by generation, 2021

- Target consumers with specific health-focused innovation
 Figure 6: Interest in innovation, by generation, October 2021
- Key consumer insights

MARKET SIZE AND FORECAST

Salty snacks see moderate growth during the pandemic

Figure 7: Total US sales and fan chart forecast of salty snacks, at current prices, 2016-26

Figure 8: Total US sales and forecast of salty snacks, at current prices, 2016–26

Figure 9: Total US sales and forecast of salty snacks, at inflation-adjusted prices, 2016-26

SEGMENT PERFORMANCE

"Other" salty snacks and meat snacks segments are fastest growing

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.

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.



Popcorn sales climb thanks to BFY identity and at-home entertainment

Figure 10: Share of salty snack market, by segment, 2019 and 2021

Figure 11: Total US retail sales of salty snacks, by segment, at current prices, 2019 and 2021

 From 2019-21, convenience stores stumble while "other" retailers thrive

Figure 12: DTC salty snacks, 2021

Figure 13: Safe and Fair, 2021

Figure 14: Total US retail sales of salty snacks, by channel, at current prices, 2019 and 2021

MARKET FACTORS

More at-home snacking during pandemic shifts habits
 Figure 15: Monthly sales of FAH and FAFH, at constant 1988 dollars, 2019–2021

New variants may drive on-going disruptions

Figure 16: Coronavirus life disruption concern, any worried, 2021

Shaky consumer confidence and high inflation can drive economizing

Figure 17: US unemployment, 2019-21

Figure 18: US consumer confidence, 2007-21

- Supply chain issues drive up snack prices, create shortages
- Interest in weight loss and wellness drives demand for BFY snacks

Figure 19: Percentage of people aged 20 or older who are overweight or obese, 2001–02 to 2015–16

· BFY eating factors into most US adult diets

Figure 20: Eating habits, 2021

Busy parents, families especially interested in more BFY eating

Figure 21: Eating habits, by parental status, 2021

 Broader sustainability movement shapes demand for ecofriendly products

Figure 22: Brands featuring ethical positioning, 2021

MARKET SHARE/KEY PLAYERS

 PepsiCo dominates market, while "others" gain share from 2020-21

Figure 23: Share of multi-outlet sales of salty snacks, by leading companies, 2020 vs 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.

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.



Figure 24: MULO sales of salty snacks, by company, rolling

52-weeks 2020 and 2021

COMPETITIVE STRATEGIES AND MARKETING OPPORTUNITIES

 Meat snack focus on men, outdoors, playful social media drives sales

Figure 25: Social media efforts of meat snacks brands, 2021

Figure 26: Jack Links Instagram, 2021

Trending meat snack flavors include more natural, plain meat flavors

Figure 27: Meat snack launches, by leading flavors, 2019-21

Figure 28: Meat snack launches featuring premium

positioning, 2021

 Cheez-Its booms with strong promotion of new cheese snack formats

Figure 29: Cheetos products and marketing, 2021

 In popcorn, SkinnyPop drives segment with new flavors, kidfriendly focus

Figure 30: Smartfood marketing, 2021

Figure 31: SkinnyPop Instagram, 2021

Unflavored/plain flavors widen lead among launches

Figure 32: Popcorn launches, by leading flavors, 2019-21

Figure 33: Popcorn launches, 2021

 Dot's posts stellar pretzel sales with down-to-earth homestyle products

Figure 34: Dot's Instagram, 2021

 PopCorners appeals as BFY substitute for chips in corn snacks segment

Figure 35: PopCorners Instagram, 2021

Figure 36: Sabritas launch, 2021

 "Other" salty snacks expand reach with far-ranging, innovative products

 Plant-based, eco-friendly products grow in a range of formats and flavors

 Legumes and veggies in a range of innovative "suitable for" snacks

Figure 37: Other salty snack launches, 2021

Plant-based jerkies and pork rinds offer sustainable meat substitutes

Figure 38: Meat alternative salty snack launches, 2021

Sourcing, social justice and sustainability bolster holistic identity

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.

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.



Figure 39: Salty snack launches featuring environmental claims, 2021

Figure 40: Salty snack launches featuring ethical claims, 2021

 Spicy and international flavors continue to engage Millennials and Gen Z

Figure 41: Salty snack launches featuring Spanish/Latin American cuisine associations, 2021 Figure 42: Salty snack launches featuring Asian cuisine associations, 2021

THE CONSUMER - FAST FACTS

- Millennials are key group driving growth and innovation
- Pleasure, satisfaction and indulgence are key, but health not far behind
- Opportunity is robust for functional, health-focused innovation

SALTY SNACK CONSUMPTION

- The vast majority of US consumers eat salty snacks
 Figure 43: Salty snack consumption, 2021
- Men are overrepresented in meat snacks, while women favor popcorn

Figure 44: Salty snack consumption, by gender, 2021

- Target Millennials, peak consumers for salty snacks
 Figure 45: Salty snack consumption, by generation, 2021
- Higher-earning households consume a wider range of salty snacks

Figure 46: Salty snack consumption, by household income, 2021

Parents comprise a key demographic, eager for varied snacks

Figure 47: Salty snack consumption, by parental status, 2021

REASONS FOR SALTY SNACK CONSUMPTION

 Themes of pleasure, satisfaction and indulgence should be emphasized

Figure 48: Reasons for salty snack consumption, 2021

 Focus on men with protein-rich snacks that can be "meals on the go"

Figure 49: Reasons for salty snack consumption, by gender, 2021

Younger consumers have myriad reasons and expect more from snacks

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.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

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



Figure 50: Reasons for salty snack consumption, by generation, 2021

Popcorn and pretzels seen as default snacks when bored

Figure 51: Correspondence Analysis – Symmetrical map –

Salty snack occasion consumption, 2022

Figure 52: Salty snack occasion consumption, 2021

CHANGES IN SALTY SNACK CONSUMPTION

Consumption on-balance is stable – but more diverse formats are used

Figure 53: Changes in salty snack consumption behaviors, 2021

Younger generations drive interest in new snacks and varied formats

Figure 54: Salty snacks packaging, 2021

Figure 55: Salty snacks wellness positioning, 2021

Figure 56: Changes in salty snack consumption behaviors, by

generation, 2021

SALTY SNACK ATTITUDES AND BEHAVIORS

Brand allegiance is high, but a quarter seek new snacks
 Figure 57: Salty snack attitudes and behaviors, 2021

Older generations stick with familiar, as Millennials seek innovation

Figure 58: Salty snack attitudes and behaviors, by generation, 2021

Target parents with more innovative, natural BFY snacks

Figure 59: Salty snack efforts aimed at parents, 2021

Figure 60: Salty snack attitudes and behaviors, by parental

status, 2021

SALTY SNACK INNOVATION OF INTEREST

Engage consumers with functional, health-focused innovation

Figure 61: Interest in innovation, 2021

 Reach out to women with snacks enhancing immunity, mood and beauty

Figure 62: Interest in innovation, by gender, 2021

Hone marketing to specific generations with health-focused functionality

Figure 63: Interest in innovation, by generation, 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.

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.



ATTRIBUTES ASSOCIATED WITH SALTY SNACKS

"Alternative" salty snacks strongly associated with healthful qualities

Figure 64: Attributes associated with salty snacks – General, by segment, 2021

APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Correspondence analysis methodology
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX - THE MARKET

Figure 65: Total US sales and forecast of meat snacks, at current prices, 2016-26

Figure 66: Total US sales and forecast of meat snacks, at inflation-adjusted prices, 2016-26

Figure 67: Total US sales and forecast of popcorn, at current prices, 2016-26

Figure 68: Total US sales and forecast of popcorn, at inflation-adjusted prices, 2016-26

Figure 69: Total US sales and forecast of cheese snacks, at current prices, 2016-26

Figure 70: Total US sales and forecast of cheese snacks at inflation-adjusted prices, 2016-26

Figure 71: Total US sales and forecast of pretzels, at current prices, 2016-26

Figure 72: Total US sales and forecast of pretzels, at inflationadjusted prices, 2016-26

Figure 73: Total US sales and forecast of corn snacks, at current prices, 2016-26

Figure 74: Total US sales and forecast of corn snacks at inflation-adjusted prices, 2016-26

Figure 75: Total US sales and forecast of other salty snacks at current prices, 2016–26

Figure 76: Total US sales and forecast of other salty snacks at inflation-adjusted prices, 2016-26

Figure 77: Total US retail sales of salty snacks, by channel, at current prices, 2016-21

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.

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.



APPENDIX - COMPANIES AND BRANDS

Figure 78: Multi-outlet sales of meat snacks, by leading companies and brands, rolling 52 weeks 2020 and 2021
Figure 79: Multi-outlet sales of popcorn, by leading companies and brands, rolling 52 weeks 2020 and 2021
Figure 80: Multi-outlet sales of cheese snacks, by leading companies and brands, rolling 52 weeks 2020 and 2021
Figure 81: Multi-outlet sales of pretzels, by leading companies and brands, rolling 52 weeks 2020 and 2021
Figure 82: Multi-outlet sales of corn snacks, by leading companies and brands, rolling 52 weeks 2020 and 2021
Figure 83: Multi-outlet sales of other salty snacks, by leading companies and brands, rolling 52 weeks 2020 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.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300



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.