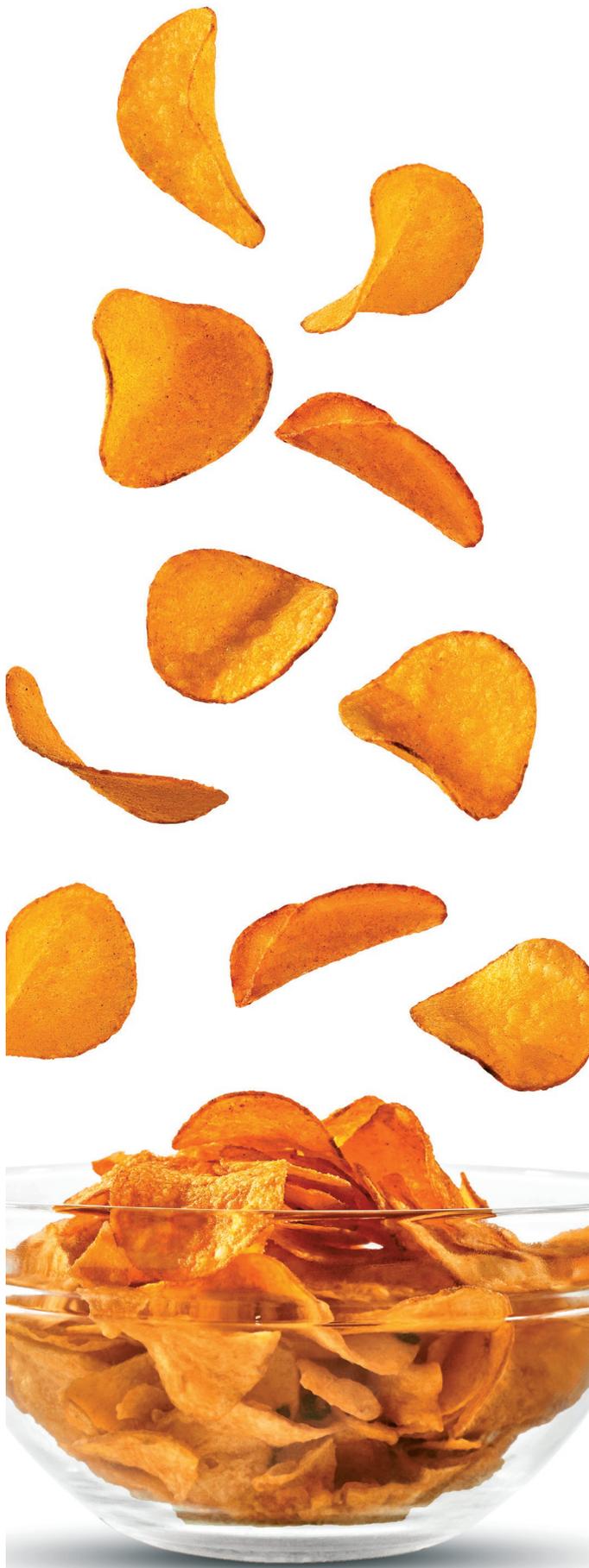


Snacking



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While the volume of snacks in the UK market has taken a similar hit to other grocery categories, the sheer diversity of the market keeps spurring its overall momentum, with value sales aided by recent inflation. Suppliers are focused on winning over the younger generation with healthier options, bold flavours and the use of social media, and they also have plenty of advice for retailers on how to score additional sales and profits in this increasingly competitive sector.

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Analysis



Turning up the heat

Spice is the ingredient of the moment in savoury snacks, while sweet treat suppliers focus on a mix of indulgence and portion control

Consumers' love for bold taste experiences and global flavours has reached a new level this year in the savoury snacks market, with suppliers developing increasingly hot options to tantalise their taste buds. Meanwhile, a focus on both health and indulgence continues to colour NPD across the board, as snack brands target a demanding shopper set, and woo retailers in a competitive environment.

Overall market performance

The global salty snacks category is now worth £4.51bn and growing at +5.7%¹, says PepsiCo chief marketing officer Fernando Kahane. "Consumers are having to make some difficult decisions when it comes to their purchases. Despite this, shoppers continue to purchase crisps as they look to treat themselves,

and this is where well-known and loved brands that offer competitively priced products come into play."

In fact, crisps and bagged snacks are part and parcel of the nation's daily routine, says pladis UK & Ireland chief marketing officer Aslı Özen Turhan. "Almost all UK households (97.8%) now regularly tuck into a pack²," she says. "As a result the category is now valued at over £4.3bn in sales³ and Brits' appetite for savoury snacks is showing no signs of stopping."

Takis marketing manager Becky Allan says the crisps and bagged snacks market is a huge profit driver for retailers, operating in a value category that is worth £2.14bn YTD (+3% value year on year) and seeing 1.46bn packs sold a year⁴. She points to the progress made since pre-Covid levels in 2019,

noting that volume retail sales of crisps, savoury snacks and nuts are up 4% since then, even when factoring in the cost-of-living challenges that consumers have faced over the last two years⁵. "The category has been shielded from cutbacks for several reasons – snacks constitute a relatively small percentage of household shopping expenditure; the UK has a strong snacking culture; there is ample scope for trading down within the category; and the rate of NPD from the major brands keeps consumers interested and engaged⁶," she says.

While Takis has experienced year on year (YOY) growth of 16.7% in value and 10.4% in units, selling 6.8m packs in the UK and Fuego landing as its number one flavour⁷, there are challenges, adds Allan. The main one is maintaining visibility in a highly competitive market,

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she says. “With spicy snacks being so on-trend at present, competition is intense; Takis isn’t just competing with other snack brands, but with confectionery, too,” she notes.

Crisps and snacks is a big category, worth £4.1bn, but demand is declining at -0.9%⁸, maintains Daniel Barnston, head of business intelligence at Valeo Foods UK. “Value growth (+7%)⁹ is being driven by inflation, while penetration at 98% is down -0.2%, and volume per trip is down -1%¹⁰.”

Meanwhile, demand for pork snacks remains strong, outperforming savoury snacks (+17% vs +5% YoY)¹¹, reveals Tayto Group marketing director Matt Smith. “Growth of more contemporary pork snacks has been even stronger with Mr. Porky Crispy Strips up 23% YOY¹², as consumers look for a lighter bite with the taste of a scratching.

Sas Horscroft, head of marketing at Burts Snacks, points to Mintel’s 2024 report¹³, which shows that crisps, snacks and nuts have maintained strong volume sales, with a 76% share in the crisps and potato-based snacking market. Brands like Burts are responding by offering a range of premium hand-cooked crisps, made using locally sourced ingredients, she says. However, she notes that standing out in an increasingly competitive market presents a challenge and, as the demand for healthier snacks and more environmentally conscious brands grows, organisations must innovate while staying true to their authentic appeal.

On the sweeter side, demand for sweet biscuits has increased over the last few years, with not only value growth, but also unit growth, reports Susan Nash, trade communications manager at Mondelez International. “While innovation plays an important part in keeping sweet biscuits an exciting category for shoppers, the majority of growth is actually coming from core, as shoppers continue to buy more of their existing favourite sweet biscuits. In fact, almost 80% of growth last year was delivered by core rather than NPD¹⁴,” she reveals.

In confectionery, chocolate is an incredibly buoyant category with overall value growth of 10.3%¹⁵, being driven by formats such as seasonal, sharing bags and tablets, she adds.

The sweet biscuits sector has continued to grow in value (+11% to just

over £3bn) and volume (+1.1%)¹⁶ in the past year, agrees Colin Taylor, trade marketing director at Fox’s Burton’s Companies UK (FBC UK). “The key opportunity for us is to work across our wide portfolio of brands to understand how we can best support and develop our products,” he says. “This has led to us restaging Maryland Cookies a year ago and recently relaunching Jammie Dodgers with fruitier jam.”

Inflation and own-label impact

Like many other categories, value growth across crisps, snacks and popcorn continues to be driven by inflation, says Calbee Group UK marketing director Claire Hooper. “Branded volume has suffered as a result, with shoppers buying less (+8% value and -2% volume)¹⁷,” she says. “Own-label has grown significantly during that time, as shoppers manage their budgets, although we’re seeing that soften and brands return to growth

more recently, as promotional activity increases again.” Calbee’s Seabrook crisps brand has seen double-digit sales growth at +10.3% YOY¹⁸, she adds.

However, while affordability is still an important factor... shoppers’ needs haven’t changed – they still want everyday family favourites, particularly with multipacks; they still look for new, exciting products to try for weekend sharing occasions; they seek out added value, such as on-pack promotions; and they want healthier options alongside everyday treats, she says.

The category has been heavily impacted by inflation, agrees Takis’ Allan. “When looking specifically at crisps, it was running at 11.8% in December 2023 compared to 8% for all food¹⁹. “Own-label is impacting most categories and the snacking category is not exempt,” she says, “Young families, the so-called middle classes and retirees are the consumers favouring own-label over branded²⁰ – most





Meat snacking gains momentum

The jerky and biltong meat snacks category is one of the fastest-growing categories across the total store, says David Harriman, country director UK at LSI, owner of the Jack Link's and Peperami brands. "The category in total grocery is worth over £36m RSVⁱ and is growing in both value (+9.3%) and units (+7.2%)," he says. "Protein has become mainstream, with nearly one in three UK householdsⁱⁱ buying ready to eat meat snacks from brands they trust. More shoppers are searching out high-protein tasty meat snacks as healthier alternatives to traditional crisps and confectionery."

The meat snacking sector is seeing greater competition with newer players in the market. One of these is The Mad Butcher, a gourmet brand

from Sigma Alimentos. Newby Groves, managing director of Sigma UK & Ireland points to a huge opportunity for meat snacking. "The main players in the space have solid, core offerings, but don't have the breadth and depth of appeal to bring new users into the category," he maintains. "A new entrant can do that and that's where we come in. Our research shows that there's a segment of the market seeking premium, authentic, traditionally made meat snacks at an affordable price – and our meat stick products fill that gap. This is an established market in Europe, with meat snacking and charcuterie an everyday occasion. With the growing popularity of at-home charcuterie boards, we believe this can soon be replicated in the UK."

New World Foods sales director Dee Quick says the company has seen consistent category growth across ambient meat snacking, largely driven by ongoing health trends as consumers seek alternative tasty, low-calorie protein snacks. "It has been important for New World Foods to meet consumer needs with smaller pack formats, which provide the on-the-go moment for snackers, but also to expand our appeal by targeting younger consumers through social and digital media channels," she says. One of the company's highlights was launching Sides Strips into Tesco and One Stop, she adds. "Going from ideation to delivery in under 12 months, this led to the creation of a £1.8m (RSV) brand from a standing start."

likely because they are more budget-conscious than any other group."

Convenience has struggled as a channel overall (-4.1%), with savoury snacks faring slightly better (-3.4%)²¹, says Tayto Group's Smith. "Sharing PMPs have been the main driver of growth (+50% in the last four years), but this has slowed as (+1.6% YOY)²² as many PMPs have moved above £1," he notes. "In contrast, Golden Wonder has remained at £1 and is outperforming (+113% vs snacks -1.6%)²³, showing how important 'value' is in a market where household budgets remain under pressure."

While inflation is reducing, prices remain significantly higher, which continues to put pressure on household budgets, adds Smith. So while savoury snacks are in value growth (+4.6%), consumers are buying less, with units in decline (-1.1%)²⁴. "As prices have soared, consumers have looked to own-label for great-tasting snacks that also

offer great value, leading to own-label outperforming branded savoury snacks (+0.5% vs -1.4%)²⁵," he says. "This shift is particularly evident in hand-cooked crisps, where own-label share has risen from 41% to 56% over the last four years²⁶."

Own-label accounts for 21% of sharing crisps and snacks in the latest MAT, says Valeo Foods' Barnston. "Premium own-label is performing ahead of this, with value growth of +11.6%²⁷."

At Burts, Horscroft notes that more consumers will be purchasing snacks for at-home sharing occasions as autumn approaches with key occasions such as Halloween and Christmas on the horizon. "Inflationary pressures have led to a stronger presence of own-label offerings, as many shoppers look for more affordable alternatives, she says. However, brands are also promoting more heavily to regain share from own-label, tapping into this consumer demand. "Despite this,

premiumisation continues to play a key role, particularly as consumers still seek indulgence for special occasions like the 'Big Night In'," she adds.

New sectors of the market are always being explored and, for United Food Brands, its chilled milk snacks are merchandised within a heavily congested fixture that is dominated by some of the biggest brands in UK retail, says managing director Richard Reeves. "However, consumers are always seeking new and innovative products, which has allowed us to disrupt the category," he notes. "This year, we have achieved distribution increases of 77% and, with more listings in the pipeline during the latter stages of Q3 and moving into Q4.

"Naturally, there are challenges with the rise of commodity prices as we saw with chocolate increasing by around 114% YOY²⁹, but the majority of these cost pressures takes time to progress through the chain, so we will not see

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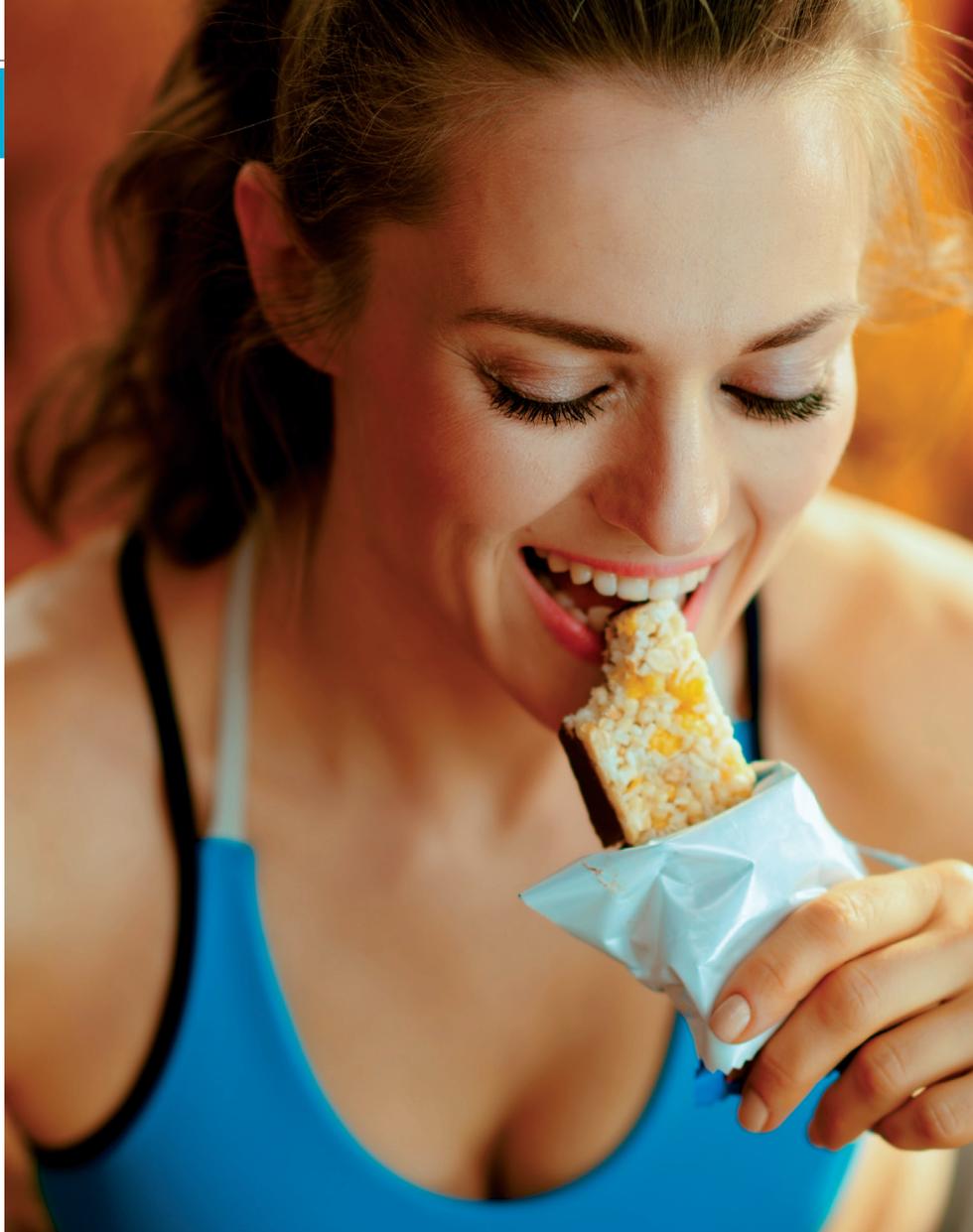
the full impact in the sector until 2025,” he adds. “However we are confident that our licensed milk snacks will continue to grow in both volume and value, due to the increased distribution and formats we are bringing to the market. Our Oreo chilled snacks show the power of a brand’s influence, which is evident in our new listings in the mults during 2024 and our 44% YOY value growth³⁰.”

Cost-of-living pressures have led to an increase in consumers ‘eating in’ more²⁸, which provides opportunities for Big Nights In as consumers see staying in with friends and family as a cost-effective alternative to going out, says Mondelez’s Nash. “Chocolate is the top choice of product for this occasion,” she says. So sharing formats like Cadbury Dairy Milk&More, one of our biggest launches over the past year in Nutty Praline Crisp and Caramel Nut Crunch flavours, are well suited to help retailers tap into the growing Big Night In occasion.”

The ongoing HFSS impact

The significant uplift in non-HFSS NPD in recent years has contributed to the rapid growth of healthier CSNP, now worth over £280m³¹, says KP Snacks’ marketing director Kevin McNair. “With 58% of households buying into healthier snacking³², it’s a prime opportunity for us. We’re continuing to grow our healthier snacking portfolio with over 100 non-HFSS SKUs available and a commitment to 55% of sales coming from products which are non-HFSS or 100 kcal or less per pack by 2030. Our popchips brand is well positioned to drive penetration and segment growth with a fully non-HFSS portfolio and a 16% share of the healthier snacking segment³³.” The company also expanded its nuts range, which are exempt from HFSS restrictions, with the launch of Honey Roast Peanut Snack Packs this year.

“Health is a need that is present within 72% of snacking occasions³⁴, which is no surprise given the increasing focus consumers are paying to their wellbeing,” says PepsiCo’s Kahane. “Consumers still want to enjoy their favourite brands and we’re committed to innovating to ensure we can continue to bring snacking options that are non-HFSS, but which still taste great and drive people down the shopping aisle.”



To help cater to this demand for smarter snacking options, Walkers launched a new, three-strong multipack range from Wotsits and Monster Munch this July, he adds. “Wotsits Cheese Toastie, Wotsits Crispy Bacon and Monster Munch BBQ Sauce are made with chickpea to offer a source of fibre, and contain 25% less salt than the average extruded product³⁵. Additionally, the entire range is under 100 calories per pack and non-HFSS.”

Shoppers are hungry for lighter versions of their favourite snacks, agrees pladis’ Özen Turhan. Having launched a successful non-HFSS version of its Jacob’s Crinklys range last year, where it slashed content by 30% in its Cheese & Onion and Salt & Vinegar flavours, the brand followed this up earlier this year with Jacob’s Crinklys Chilli Beef, a new take on its non-HFSS recipe, she reveals.

Consumers understand that snacks are a treat and they expect them to

taste great – even the healthier ones, says Tayto Group’s Smith. “While plenty of non-HFSS products have been launched, many have failed to live up to consumers’ expectations and so, sales have struggled. Tayto has taken millions of calories and tonnes of salt out of our portfolio, but only where it doesn’t compromise on taste. Where we can move to a non-HFSS product without compromise, such as Golden Wonder Tangy Toms, we will.”

According to Jon Davis, shopper marketing manager at Valeo Foods, while there has been a slight increase in healthier snacking sales and a more pronounced decrease in sales of HFSS products, the majority of consumers still cannot see a big difference in stores. “This is a credit to the supermarkets,” he says. “Clever merchandising, such as in-aisle promotions and slim bays are allowing them to display HFSS promotions in prominent footfall spaces. We are

Is Gen Z reshaping the market?

According to Segmantaⁱⁱⁱ, Gen Z's snacking preferences are reshaping the market, with salty snacks like potato chips leading the charge, says Burts Snacks' Horscroft. "In a surprising twist, fresh produce, including fruits and vegetables ranks as the second most popular choice, with over 57% of Gen Z opting for these healthier alternatives either regularly or occasionally^{iv}. This indicates a shift in eating habits among younger consumers, who are increasingly favouring multiple snack occasions over traditional three-meal structures," she says. "Retailers should adapt by offering a wide variety of snacks and flavours to meet the growing demand for quick convenient snacking options, which are becoming more

prevalent than formal dining occasions."

Kevin Butterworth, marketing director at Nairn's, confirms the shift in the savoury snacking category in terms of usage, with consumers moving towards more snacking occasions. "Gen Z have moved away from the traditional '3 meals a day', often eating up to six or seven times a day – and brands that tap into this are more likely to succeed with this audience," he says.

Research shows 60% of 16- to 24-year-olds snack two or more times a day compared with only 30% of over-65s^v, making the former the most important group to target, says Takis' Allan. "The prevalence of snacking underpins the widespread and frequent use of crisps, savoury snacks and nuts^{vi} and their links to many different

occasions, the most important being evening snacking, followed by daytime snacking and having with lunch^{vii}," she adds.

At KP Snacks, McNair notes that the company is seeing strong growth in lunchtime snacking, as well as continued growth in the food-to-go mission. "Daytime snacking, whether a packet of crisps as part of a meal deal or a boost between meals, represents a high proportion of occasions in-home and on-the-go," he says. "For example, consumers snack to keep their energy up throughout the day and nuts cater to this with nutritional and functional benefits.

"At nearly five times the size of the nearest branded competitor KP Nuts is the UK's No.1 nut brand^{viii}."

working on new formulations for our iconic Kettle flavourings to ensure we have more compliant products in our range, which will allow us to be present in as many parts of the store as possible."

Meanwhile, Valeo Foods' senior brand manager Charlotte Rogers notes that while HFSS regulations may influence the short-term choices, the longer-term consumer shift is towards eating well rather than gaining greater control of overall consumption. "We are seeing a premium healthier sector emerge, where consumers are looking more at benefit-led health benefits in their snacks, such as higher protein levels and added vitamins, versus products that have less calories or salt and sugar," she adds.

At Calbee, Hooper says there is a clear distinction between products bought for indulgence versus health, mainly pack format and time of day. "Most shoppers buying with healthier snacking in mind

want multipacks for portion control, while indulgent products tend to be in sharing formats," she notes. "Better for you' products also tend towards weekday consumption, whereas indulgent products are bought more for a weekend treat."

FBC UK's Taylor says the company has not seen any topline impact on shopper behaviour from HFSS display restrictions, although the bigger supermarkets have certainly seen shopper marketing and sales promotions shift into the main biscuit aisle, with shoppers very much following and discovering more choice as they have done so. "Many retailers have also tapped into the relevance of sweet biscuits to events across the year, including Big Night In and Halloween," he says. "Different shopping missions have also presented opportunities such as the inclusion of Jammie Dodgers Giant in meal deals, as well as the potential to drive basket spend with

cross-category shopping. This has led to sweet biscuits increasingly being tied into other shelf space and categories around the store."

Mondelez's recent non-HFSS launches include Cadbury Brunch Light designed to target the mid-morning snacking occasion, while its new belVita Soft & Crunchy caters to both breakfast and snacking on-the-go missions. The latter contains 50% less saturated fat than alternative adult sweet bars and are high in fibre, reveals Nash. Beyond these non-HFSS launches, it introduced Cadbury Delights last year to tap into the lower-calorie chocolate category, which is growing by over 28% annually³⁶. Coated in Cadbury chocolate with a soft nougat filling and caramel layer inside, they are just 91 calories per bar and come in Salted Caramel, Orange & Caramel and Hazelnut & Caramel flavours. "We've recently seen a 6%³⁷ YOY increase in on-the-go missions

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within healthier³⁸ biscuits, with shoppers increasingly looking for healthier³⁹ snacks while out and about, and we can anticipate this trend will continue,” she says.

According to New World Foods’ sales director Dee Quick, HFSS legislation has almost certainly driven a shift towards healthier snacking. “We have seen a dramatic change within the key retailers that have been impacted in terms of scale,” she says. “Promotional spaces have been reshaped to allow for more non-HFSS snacking products. A requirement to plug the ‘value hole’ in these retailers has presented an opportunity for ambient meat snacking and other exempt or compliant products. This enabled us to accelerate our jerky & biltong brands and products across the major multiples in the last 18 months, leveraging our HFSS-exempt status, securing front-of-store space on pre-filled units and, recently, gaining listings in the meal deals space.”

For Jack Link’s it’s all about the protein, says David Harriman, country director UK at LSI. “Shoppers see meat protein snacks as the best source of protein to give them energy for the whole day, which makes Jack Link’s a good alternative to traditional crisps. As a 100% lean beef, ready-to-eat snack, Jack Link’s is high in protein, naturally lean, low in calories (below 70 calories in every 25g serving) and low in fat.”

Consumers are realising that high-protein diets aren’t just for avid gym goers but contribute to a healthy lifestyle for everyone and protein can be found in many of the foods they already enjoy, adds Sigma UK & Ireland MD Newby Groves. “The Mad Butcher products tap into the current trend for high-protein diets, with over 30g of protein per 100g of product.”

However, as he points out, it’s not just about calories any more and consumers are much more aware of what goes into their food, with a rising awareness of ultra-processed foods. “With The Mad Butcher, we sought to create the most natural product possible, focused on quality and provenance. At a time when budgets are tight, we want to challenge the value perceptions of the category and show that high quality doesn’t have to break the bank.”

While taste is the number one category driver as consumers look to try new formats and textures, driven by new snacking occasions in savoury



biscuits, holistic health can support taste credentials, but functional health can detract with certain audiences, says Nairn’s marketing director Kevin Butterworth. “Consumers are looking at the back of the pack more than they ever have and are seeking brands that have clean ingredients deck or familiar ‘kitchen cupboard’ ingredients.”

That said, he says the health and wellbeing trend continues to grow, as consumers are all trying to be healthier – either making healthier choices or eating things that are better for them. “Savoury biscuits are seen as a healthier snack alternative to bread, crisps and chocolate,” he notes. “However, there has been a cultural shift in how health is defined in food – from ‘less bad’ to ‘more good and naturally good’. Consumers no longer see a compromise between a brand that can be both tasty and healthy and are actively seeking brands that deliver this.”

While United Food Brands’ Reeves

acknowledges the importance of HFSS in providing transparency for consumers when making snacking choices, he says it has been challenging to reduce the sugar content within the chilled desserts category while producing a product that consumers can enjoy. “Our innovative snacks are an indulgent, permissible treat, and have been created to elevate afternoon snacking occasions,” he says.

“Meeting the requirements for a healthy snack without compromising taste is a constant challenge,” he adds. “Healthy snacking has been a growing market; however, consumers have more than one need and it is essential to meet all of these needs. Allowing NPD such as our new kefir to meet the requirements of a gut-friendly snack to support new consumer wants, while maintaining growth with our core range, is an ongoing target for our business in 2025.”



The growing power of social media

For a brand that is targeting the Gen Z market, social media – TikTok and Instagram in particular – are both incredibly important platforms, says Takis' Allan. "They enable Takis to not only be visible but build a community it can engage with," she says. "Takis invests heavily in influence engagement across both platforms... and love for the brand is so strong that online conversations on Takis have grown by 1,290% since September 2023 and brand sentiment has increased from 12% to 30.5%^{ix}," she reveals. "What's more, when a third SKU was launched in April 2024, awareness levels among 16- to 26-year-olds was already at 10% by June^x."

Social media is the real trend driver, says Valeo Foods' Dulskaya. "Its penetration is 95%

among younger people – especially Gen Z, who are 'digital natives', engaging with TikTok and Instagram throughout the day. So there is a solid effect from social media on their lifestyle and food habits. We now have TikTok and Instagram as a must to be always on and deliver our brands' image and values."

Social media plays a huge role in everyday life, shaping people's beliefs and consumption behaviours, comments LSI's Harriman. "This is especially true for Millennials and Gen Z, who spend more than two hours each day consuming content on social media platforms," he says. "As Jack Link's is mainly consumed by males, aged between 20 and 45 years old, and passionate about fitness, sports and gaming, social media has

been key to reach these audiences. The Jack Link's brand has been connecting with digital influencers in these areas to showcase the variety of products available in the range."

Working with social media platforms is proving a better avenue to drive ROI and reach a younger audience that is less engaged with traditional media and advertising channels, says New World Foods' Quick. "We've been able to target current and potential meat snacking customers and identify those likely to purchase for the first time, as well as those who will repeat-purchase," she notes. "Working with retailers like Tesco – to tag them in our posts and raise awareness – drives direct and indirect sales, as well as building brand trust and loyalty."

Spice and more spice

Shoppers love bold flavours, with spicy notes that range from tongue-tingling to fiery hot, says Calbee Group's Hooper. "It's a trend that has dominated for the last 12 months and shows no sign of slowing," she says. "Seabrook is supporting this with its Loaded Curly Fries, available in a variety of punchy flavours, including nacho cheese & jalapeño, as well as cajun spice flavours."

The brand has also brought back Fire Eaters into its Loaded range, she adds. "Fiercely hot, Seabrook Fire Eaters feature smokehouse cayenne, and Trinidad scorpion chilli flavours."

Takis' Allan also highlights the rise of spice. "When it comes to shopper attitudes to snacking, bold and strong flavour choices are dominating purchase decisions," she says. While planned purchases lend themselves to 'weaker' flavours, impulse purchase (57% of shoppers buy bagged snacks

at least once a week)⁴⁰ is where intense flavours, such as chilli and paprika have their moment to shine⁴¹. The 'need for heat' is not showing any signs of stopping as 33% of snackers are looking to explore new intense flavours in the category⁴², suggesting a continued interest in spicy flavour profiles."

Takis' most recent NPD launch was Dragon Sweet Chilli – hot and spicy corn chips filled with a spicy sweet chilli flavour combination.

Sigma's Groves says he is seeing more interest in hot flavours, particularly among younger consumers and this is influencing what arrives on shelves. "What starts on TikTok often ends up in supermarkets, and with the rise of viral heat tasting challenges online, Ed Sheeran launching his own hot sauce and Takis taking supermarkets by storm, the spice trend shows no signs of slowing down. This trend certainly influenced the flavour profiles we chose for the initial The Mad Butcher SKUs,

and our Chilli Pork Snacks always go down a treat at beer festivals with the younger audience."

Kahane says PepsiCo is seeing increasing demand for spicier snacks within the category, fuelled by the nation's love for spicy foods. "To say UK consumers are hungry for spice would be an understatement," he says. "51% have said they love spicy food⁴³, while the UK's desire for spice ranks as the second-highest in Europe⁴⁴. The hot and spicy space has grown by 8.9% in the savoury snacking category year on year⁴⁵, and we believe it will continue to flourish.

"So, we knew there would be an opportunity to bring our Extra Flamin' Hot range to the UK and capture the next generation of snackers. The platform is already a global sensation and has a proven track record – in Mexico, it is the second-biggest PepsiCo brand, just behind Doritos⁴⁶," he reveals.

Meanwhile, Valeo Foods' head of

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marketing Anastasia Dulskaya notes: “It’s not only about flavour but the overall experience. People strive for a snack to unwind and escape, so we’re cooking some new flavour experiences for our Kai Kettle next year. In terms of flavour profiles, the spicy segment is the biggest in the category and Valeo is playing its strong seller Black Peppercorn, but is looking wider afield for 2025,” she adds.

Spicy BBQ is a favoured choice among consumers in the hand-cooked snacks category, indicating a demand for products packed with taste, confirms Burts Snacks’ Horscroft. Burts introduced a limited-edition flavour of Spicy Barbecue hand-cooked potato chips to its range for summer 2024, but has also launched its premium-flavoured Beef and Mustard Ridges this year.

New flavours across KP Snacks’ range of products include the recent launch of Caramelised Biscuit Toffee Popcorn under its market-leading⁴⁷ Butterkist brand, while its Tyrrells crisp brand has added new Chicken & Sage and a limited-edition Wallace & Gromit Wensleydale & Cranberry flavour, reveals McNair. In addition, the company recently added two new products to the McCoy’s range inspired by classic American flavours: Grilled Cheese and Flamin’ Fajita.

At New World Foods, the collaboration with The Sidemen Group and its brand Sides has been a vehicle to introduce new exciting on-trend flavours, dislocating from the more traditional BBQ, original and chilli variants dominating the jerky and biltong category, says Quick. The company is targeting younger shoppers with Korean BBQ, buffalo chicken and smoky chipotle spice and has some “very exciting and industry-leading flavours” ready to hit the shelves in the coming weeks, she adds.

Sweeter news

Seasonal flavour innovation has seen Mondelez introduce Oreo Gingerbread, a follow-on from the launch of Oreo Vanilla Latte earlier this year, reveals Nash. The festive snack features embossed gingerbread-flavoured cookies. Meanwhile, the company is also bringing back the Cadbury Dairy Milk Winter Mint Crisp 360g tablet to its Christmas line-up, to help retailer further tap into the sharing occasion with this popular flavour, she says.

Meanwhile, United Food Brands has worked to build further collaborations with world-famous licences, such as the Minions Choco-Banana Snack, Gabby’s doll house and Kung Fu Panda movie snacks. “Innovation, NPD and branding will continue to always play their pillar roles in the success of a category,” notes Reeves.

FBC UK introduced a new Apple & Blackcurrant flavour to its jammie Dodgers Minis range this year and expects the trend for portion control biscuits to shape plenty of NPD in the months and years to come.

In-store advice

Research tells us that shoppers feel overwhelmed and bored at fixture, reveals Valeo Foods’ Davis. “They find it hard to locate products and want to get in and out of the aisle quickly,” he says. “There is an opportunity to make the shopper routine easier, but to inspire with out-of-aisle or occasion-based activities. We are starting to see the rise of branded bays in the big four [multis] which really bring brands to life in category as much as it does in more traditional secondary feature space like the season aisle. Unlocking more of this type of space to suppliers with a wider range of options, such as digital screens, will drive brands’ ambitions visually and help them grow their consumer base through increased recognition and loyalty. This will stimulate further competition in the aisle and grow the category as it gives consumers more compelling reasons to stay in the aisle for longer and make a brand choice, instead of focusing on the price of the ticket and moving on quickly.”

At Takis, Allan believes the crux of in-store merchandising in this category comes down to recognising two different shopper journeys – for parents and Gen Z – with the former favouring the planned shop and the latter leaning towards impulse purchases. “Four in five category shoppers (78%) know what they’ll buy before buying⁴⁸, which means that 22% of shoppers visiting the main aisle haven’t made up their mind on what to buy⁴⁹, demonstrating the need for eye-catching main aisle merchandising and convincing POS activations,” she says.

“When it comes to impulse, 25% of consumers buy crisps and bagged snacks one a week, with a further 23%

buying them twice a week⁵⁰,” she adds. “In fact, 40% of consumers buy crisps on the go with this figure rising to 56% for Gen Z⁵¹. This is compared to the 56% of parents (vs 40% of Gen Z) who buy crisps for days out – a more likely planned purchase⁵². This demonstrates the importance of merchandising for both audience groups and appreciating that their shopper missions differ – and they therefore need to be reached via merchandising in different ways.”

Retailers need to actively involve their suppliers in the planning stages of merchandising to make the most of the planogram, maintains United Food Brands’ Reeves. “Allowing suppliers to provide the input within the merchandising can support targeting the intended demographic, backed by supplier insights.”

According to PepsiCo’s Kahane, retailers need to focus on particular points in-store to improve snacks merchandising. These include secondary sitings in-store, which are vital to the category, particularly as





shoppers are four times more likely to buy crisps, nuts and snacks if they see them in a secondary location⁵³, he says. Also, best-sellers should be at eye line as this can drive up to 38% more sales versus being on the bottom shelf⁵⁴, he notes. While displays nearer the till play a key role for purchasing, with 35% of sales in the savoury snacks category coming from them⁵⁵, retailers should remain mindful of HFSS legislation and prioritise products that are compliant.

At pladis, Özen Turhan says the company would encourage retailers to invest time in creating attractive displays in high footfall areas, featuring a range of the best-selling snacks and enticing NPD, as this will have a strong influence on shopper purchasing decisions. “It’s about making the shopper experience as seamless as possible, so themed space and signage, and offering secondary siting and strong point of sale, where permitted, are essential considerations to maximise sales,” she says. She also suggests adjusting ranges based on

the seasons, with bold flavoursome products, especially in sharing formats for dark winter nights, and lighter options or convenient grab-and-go formats for warmer months.

Consumers are both time- and cash-poor, so merchandising should be focused on helping them make quick decisions, says Tayto Group’s Smith. “Think about missions, such as a weekend night in front of the TV. Consumption of pork snacks peaks at the weekend, normally with a drink. Scratching are also a highly impulsive purchase, so merchandising them next to BWS will drive incremental sales.

“For independent retailers, where PMP snacks account for 79% of sales⁵⁶, merchandising by price-point makes it easier to shop. Sharing PMPs account for almost two-thirds of (63%)⁵⁷ of sales, so having a strong range of both £1 and £1.25 PMPs is essential,” he adds.

When it comes to meat snacking, there is not always a defined home in-store, says Sigma’s Groves. “With increased consumer interest in the

category, this needs to change to be able to support the category’s growth,” he says. “Crisps and nuts, for example, have a clear destination in-store across all retailers, but meat snacking is often slotted in around deli meats, charcuterie or food-to-go. A dedicated home for these products and clear signposting at fixture would give a huge boost to the category at this key time of growth.”

Indeed, finding a home for shoppers to discover high-protein meat snacks in-store is key, says LSI’s Harriman. “Merchandising with other bagged snacks, crisps and nuts is fundamental, as ambient protein meat snacks offer a healthier alternative snack for shoppers,” he says. “Some may be looking for something different to their usual salty snack choices, while others have become more health-conscious and are seeking out a high-protein, low-calorie product that tastes great. Cross-merchandising also allows retailers to benefit from the healthier snacking opportunity.”

Analysis

Within meat snacks, New World Foods wants to encourage the impulse purchase, says Quick. “So we have focused on making our range of products available at the till point and in retailer meal deals, while ensuring our clip strip products are fully available and in multiple locations across the store. As brands grow and have more relevance in total snacks, we will continue to encourage retailers to think about the free spaces – end of aisles or by checkouts – as we build towards our specific in-store goal of creating a space within retail for ambient healthy meat snacks.”

For Burts Snacks, the Big Night In concept is a good opportunity for retailers to strategically pair crisps with beverages and other food items that will appeal to consumers. “As more people host at-home gatherings, the demand for sharing packs has increased, with 47% of those who have hosted social gatherings being interested in food-sharing boards⁵⁸,” says Horscroft. “Placing sharing packs alongside drinks cases in-store, such as a six-pack of beer or soft drinks, will encourage consumers to group these items together if they are hosting, offering a more efficient and cost-effective purchase.”

Future trends

Many suppliers including Valeo Foods’ Davis, New World Foods’ Quick and Tayto Group’s Smith point to HFSS-compliant products as being important over the next few months as legislation evolves. So key trends will be around ‘healthier’ products, although they also acknowledge the prime importance of taste in NPD and the self-treating factor of snacking.



FBC UK’s Taylor notes that, in sweet biscuits, shoppers are buying products that facilitate portion control, but that it’s important to remember special ‘treat’ moments, also. “We’re seeing an uptick in impulsive indulgence as shoppers buy premium treats as an unplanned reward when they see them in-store,” he says.

While inflation is easing, prices remain high and many consumers are struggling financially, says Tayto Group’s Smith. “Savoury snacks are often robust in difficult times as an affordable treat. But volumes are flat – at best. So, own-label and brands that offer great value will continue to feature strongly in baskets.

Taste, health and bold flavours are the three CSN trends identified by PepsiCo’s Kahane. “We recommend retailers offer

well-loved core brands with established flavours, alongside a wide range of taste-led NPD to maximise sales and continue to drive profit in the channel,” he says. To offer snacking choices for each shopper’s needs, retailers should look to the latest NPD coming through which helps deliver lower salt and lower fat options. Meanwhile, Gen Z is a huge focus for a lot of our brands and they are demanding bolder snacking experiences⁵⁹.”

Intense flavours will continue to dominate and be key maintaining consumer interest, agrees Takis’ Allan, adding that “35% of consumers say they buy intensely flavoured crisps and bagged snacks because they like spice, 30% because they like intense flavours and 33% because they like to explore new flavours⁶⁰”, she says.

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Meat snacking

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Gen Z

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Barcel Snacks UK – Takis

Igniting the snacking market

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– Fuego
– Volcano
– Dragon Sweet Chilli

There is no denying that Gen Z marketing has exploded in the last decade. Its growth trajectory has mirrored the increasing popularity of social media and influencer engagement, as the technological sophistication of these channels develops, and consumer engagement becomes more entrenched, says Becky Allan, marketing manager at Takis.

“This means that any brand wanting to reach Gen Z consumers will take a social media- and influencer-first approach, as this is the world that this generation inhabits,” she says. “Some Gen Z consumers are starting to experience the financial freedom that comes from employment, opening up the sales opportunity further for brands.”

Super-snacking generation

In the case of Takis, market trends and consumer insights make clear that Gen Z is the super-snacking generation¹, reveals Allan. In fact, the number of 15- to 24-year-olds is projected to increase by nearly 8% (0.6million) over the five years to 2028². As an age group that snacks more often than the others, they are a critical audience. However, only 15% of the UK population – approximately 10m people – falls into the Gen Z category³. So, what about everyone else?

Opportunity to spice things up

“Crisps and snacks dominate the UK market – in fact, almost 9 in 10 consumers are buying them every few weeks⁴,” observes Allan. “Our research shows there is a huge opportunity for the spicy snacks category to market to Millennials and Gen X, too. This includes parents in charge of the weekly supermarket shop⁵, as more than half (56%) will buy snacks for days out⁶. It is no secret that the UK has an ageing population, and the number of over-55s is projected to grow by 1.4m in the next four years, presenting the category with an opportunity to grow its consumer base.”

Allan adds: “These audiences need to be approached in distinct



“Gen Z are quite rightly the primary audience for our category – but what about everyone else?”

ways to reflect their different shopper journeys – youngsters are impulsive, whereas older generations are planners. Both buy snacks for different consumption occasions too, and out-of-home marketing and in-store merchandising need to be reflective of this and the audience that is being targeted.”

Evening snack occasion

The main entry point into the category is snack time for 76% of 16- to 26-year-olds, compared to movie nights for 73% of the over-40s⁷. This is mirrored by Mintel, which has reported that an evening snack is the biggest occasion for eating crisps and crisp-style snacks for over-55s⁸.

“The concept of treats and sharing should be core to any marketing that targets the evening snack occasion, given that those buying crisps and savoury snacks to enjoy during a night in will most likely do so in order to treat themselves (67%) and to share with others (40%)⁹,” concludes Allan.

To be part of the growing global sensation, visit Takis’ website on <https://takisgb.co.uk>



Source

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Burts Snacks

Locally sourced quality

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Burts
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Quicke’s Traditional
Eversfield Organic
Spoilt Pig Farm
Splattenriden Farm
Colwith Farm Potatoes
Trenowth Farm
New Rydon Farm
Hay Farm
Treleathick Farm

 The hand-cooked crisps market is constantly evolving, as consumers seek snacks that balance indulgence with wellbeing, says Sas Horscroft, head of marketing at Burts Snacks. “Brands like Burts are responding to this by offering a range of premium hand-cooked crisps that are made with care, using locally sourced ingredients and potatoes from suppliers across the south west.”

New product development

Burts is actively innovating with several exciting new product developments, she reveals. “Recently, we introduced a limited-edition Spicy Barbecue flavour to our hand-cooked potato chips, available through Amazon and select independent retailers, cafés and pubs,” she reveals. “Additionally, Burts launched a new premium flavour of Beef & Mustard Hand-Cooked Ridges in December 2023, which is available at independent shops, farm shops and pubs. The Ridges are gluten-free and free from added MSG, artificial colours, and flavourings.

“Creating products that are gluten-free, vegetarian and free from artificial flavours is crucial in today’s market,” says Horscroft. “And producing innovative, bold and premium flavours, which appeal to the growing demands of consumers, helps us to differentiate our product range and stand out in an increasingly competitive market.”



“What sets Burts apart from the competition is our unwavering commitment to quality, provenance and community”

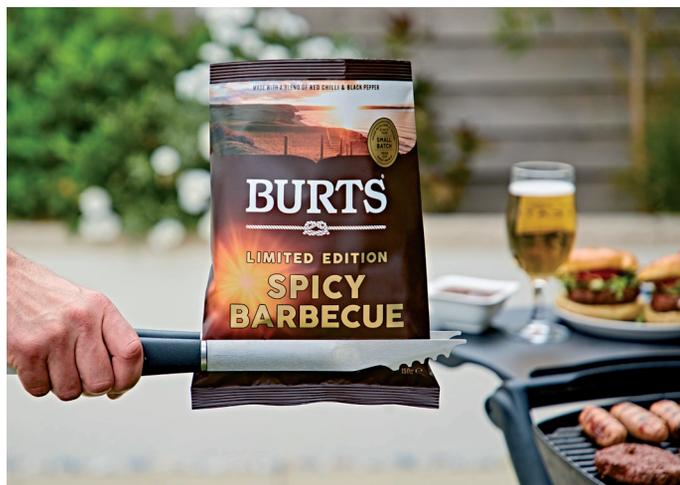
Local sourcing

What sets Burts apart from the competition is its unwavering commitment to quality, provenance, and community, notes Horscroft. “The brand prides itself on sourcing locally, using Red Tractor approved potatoes and partnering with local suppliers such as the South Devon Chilli Farm and Quicke’s Traditional Cheese to flavour our hand-cooked potato chips with care,” she says. “This dedication ensures that each product is made from the freshest ingredients and reflects Burts’ deep-rooted connections with the local community.”

Sustainability credentials

Working with local growers and suppliers means that Burts can maintain the highest standards of quality and boosts the brand’s sustainability credentials, she adds. “By sourcing locally, we reduce our carbon footprint through transportation, and end-consumers can enjoy our snacks knowing they are made with care, from field to pack.”

For the remainder of 2024 and into 2025, Burts is focusing on highlighting its commitment to local sourcing and quality, further engaging consumers and strengthening its position in the market.



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Calbee Group UK

Brilliant by the bagful

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Seabrook Crisps
Harvest Snaps
Seabrook Loaded
Peppa Pig Really
Cheesy Lentil Puffs

Seabrook Crisps has a bagful of reasons to celebrate! Not only are preparations underway to mark the brand's 80th year in 2025, but the iconic crinkle-cut crisps brand has outperformed the UK crisps, snacks and popcorn (CSP) category by 6%¹, reveals Claire Hooper, marketing director at Calbee Group UK, owner of the brand.

Now the UK's second-largest crisps brand by volume, Seabrook's national gains have increased brand penetration to 33.5% from 27.3% in just three years², she says. "When Seabrook was acquired by Calbee, we started out on a journey to become a much bigger player within the category. We launched a programme of activity that had one aim – to accelerate growth, which we are achieving by the bagful."

Great-tasting challenger brand

Seabrook has been a key driver in Calbee UK's success, which saw turnover increase by over 16% and operating profit by 59.2% to achieve a retail sales value of over £98m in 2023³, says Hooper. "Our growth started with our core crisps," she explains. "However, we have also leveraged our position as a great-tasting, affordable challenger brand and taken these values into more formats and occasions, meeting more consumer needs and reaching more snacking moments. This has all been backed by a step-change in marketing investment."

Brand activations

Seabrook continues to increase its brand support throughout the path to purchase, from mass media reach right through to activation at the shelf. Increasing budgets by 50% over three years, 2024 marks Seabrook's largest marketing spend to date, which has featured a new 'Brilliant by the Bagful' TV advert creative, on-pack promotions and primetime ITV sponsorship. The creative celebrates the brand's down-to-earth values and the public's favourite Seabrook crisps and snacks.

Speaking of Seabrook favourites, the brand has recently brought back



“We have leveraged our position as a great-tasting affordable challenger brand, taking these values into more formats”



Tomato Ketchup crisps. On shelf for a limited time only, this latest addition to the range reinforces the brand's ability to react to key trends within the market and respond to consumer love for former Seabrook flavour favourites.

Christmas specials

Continuing to delight fans with new product development, Pigs in Blanket puffs and Turkey & Stuffing crisps are heading into the Seabrook snacks range as Christmas specials soon.

Hooper concludes: "Our product pipeline and plans for new formats and snacking occasions have never been stronger, but what's even more exciting is our brand's potential. Having just invested £15m in new capability and capacity across our manufacturing sites, we have so much room for growth and are excited to continue building on Seabrook's success in the years to come."

Source

^{1,2} Kantar, 52 w/e 14.04.24
³ Company report and accounts to December 2023

Bagfuls of flavour

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Fox's Burton's Companies

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Maryland Cookies
Fox's Cookies
Jammie Dodgers
Fox's Chocolatey Rounds
Thomas Fudge's
Florentines
Rocky
Wagon Wheels
Fox's Crunch Creams
Fox's Classic Assortments
Paterson's Shortbread

➔ Sweet biscuits are a much-loved part of our snacking repertoire in Britain, whether they are decanted into a biscuit tin or eaten on the go as single servings. As a nation, we spent more than £3bn on sweet biscuits last year, up +11% year on year (with volume up by 1.1%)¹. Fox's Burton's Companies (FBC UK) is the second-largest baker of branded sweet biscuits in Britain, and has the fastest value and volume growth of any major branded baker (+19% and +10% respectively)². Baking since 1853, the company uses its expertise in bakeries across England, Scotland and Wales to create unique moments of enjoyment for every occasion, it says.

Make sure you offer the staples

The majority of sweet biscuits eaten in Britain are multi-serve packs that are typically decanted into a biscuit tin or cookie jar, adds FBC UK. "These 'anytime treat' biscuits include Crunch Creams, Jammie Dodgers, Maryland Cookies and Paterson's Shortbread Fingers, and are the must-stock items for every retailer," it says. "These account for £933m of sweet biscuit sales, and are up 14% year on year³, which also makes sweet biscuits the second-fastest growth segment for sweet biscuits.

Cater for the three biggest trends

FBC UK is keen to stay ahead of shopper trends, and has prioritised three: events, portion control and impulsive indulgence. All of these areas present snacking opportunities that stretch beyond the traditional biscuit tin, for retailers of all sizes, it says.

Make more from Minis

FBC UK is the market leader in the £145m mini biscuit segment⁴. Mini biscuits have been the most dynamic segment of sweet biscuits over the past five years, with value up 14%⁵, as shoppers increasingly appreciate



“As a nation, we spent more than £3bn on sweet biscuits last year, up +11% year on year, with volume up by 1.1%¹. Fox's Burton's Companies has the fastest value and volume growth of any major branded baker²”

the portability and portion control of these snacks (each mini bag is typically under 100kcal). While mini biscuits are often bought with packed lunches in mind, most are still consumed in-home⁶ despite the strong value for money they offer versus other lunchbox items. FBC UK further supports value for money with larger packs (for example, a 10-pack) for bigger stores.

Expand on chocolate biscuit bars

Chocolate biscuit bars have been the second-biggest and third-fastest growing part of sweet biscuits in the past year (£740m, +13%)⁷. FBC UK's brands Rocky and Wagon Wheels have helped drive this performance with value sales +16% and +14% respectively⁸, it says. "Portion control, portability and treating moments are occasions retailers can tap into with a selection of our larger multipacks."

Increase impulse opportunities

British shoppers display their most impulsive behaviour when buying food-to-go, with high interest in lunchtime fixtures and hot drinks. FBC UK has a wide range of branded biscuits to meet single portion needs in retail and foodservice, with Maryland Minis grab bags, Fox's Cookie two-packs, the iconic Jammie Dodgers Giant and many more.



Source

¹⁻⁵ Combined Read of NIQ Total Coverage (ex Aldi, Lidl, Poundland, Farmfoods) 52 w/e 03.08.24 + Kantar Hard Discount & Variety Retail 52 w/e 04.08.24
⁶ Kantar Usage 52 w/e 09.06.24
⁷⁻⁸ See 1-5



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*Source - Sweet Biscuits incl Healthier Combined Read NIO Total Coverage 52we 08 08 24 + Kantar Hard Discount & Variety Retail 52we 04 08 24

Grenade

No compromise on snacking

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Grenade

Following a ground-breaking 2023, Grenade has continued to lead the way on healthier snacking with its best-selling range of protein bars, says Phil Greenhalgh, managing director UK. The brand's £71.3m¹ value over the last 12 months, a 48.2% share of the category's £147.8m value², cements Grenade as the go-to protein bar brand in the UK, he notes. "With the growth of the protein bar category, up 18% in the last 52 weeks³, shoppers are continuing to opt for low-sugar, high-protein snacks, so it's important that retailers continue to focus on how best to maximise the opportunity protein-packed snacks provide," he says.

Grenade Oreo, Grenade Oreo White and Chocolate Chip Salted Caramel provide customers with the ultimate snacking option and have been proving their powerhouse protein credentials across all retail channels in the last 12 months, amassing £29.5m in sales⁴, adds Greenhalgh. "These must-stock flavours combine to deliver a lucrative cash rate of sale, earning their space on-shelf and even rivalling many leading confectionery lines."

HFSS solution

Grenade's wider range of low-sugar, high-protein bars provide a ready-made solution for stores impacted by HFSS regulation, to ensure shoppers can still pick up great-tasting, chocolate-covered, healthier options, he explains. "Best-selling flavours such as White Chocolate Cookie, Caramel Chaos and Chocolate Chip Cookie Dough offer customers delicious, protein-packed snacks that meet their desire for health and indulgence when impulsively choosing a snack in these busy locations in-store. Having a varied range is imperative to success with protein snacks, offering the customer choice between health, indulgence, or both."



“Shoppers are continuing to opt for low-sugar, high-protein snacks, so it’s important that retailers continue to focus on how best to maximise the opportunity protein-packed snacks provide”

Snack-sized and multipacks

For those after a smaller bite, Grenade's range of 35g snack-size bars offer the customer the chance to indulge in a tasty triple-layered treat, all still packed with 12g protein per bar, he adds. "Available in best-selling flavours Grenade Oreo, Grenade Oreo White, Chocolate Chip Salted Caramel and White Chocolate Salted Peanut, these bite-sized bars provide a great snacking solution alongside other snacks and drinks, and often feature in retailer meal deal offers to cater to shoppers trying to boost their protein intake."

Finally, with the growth of protein bars as a snack, more and more customers are actively searching for value and considering a take-home solution instead. "Grenade's best-selling range of protein bars are available in a 4x60g multipack in popular flavours such as Grenade Oreo and Chocolate Chip Salted Caramel," notes Greenhalgh. "These enable customers to stock up for later when doing a larger shop or as a top-up occasion in express stores. Retailers should ensure they provide these alongside other larger pack formats in-store to drive bigger basket spend."

Source

^{1,2} IRI Total Market, Total Protein bars, Value Sales, 52 w/e to 07.07.24
³ IRI Total Market, Total Protein bars, Value Sales % Growth, 52 w/e to 07.07.24
⁴ IRI Total Market, Total Protein bars, Value Sales by SKU, 52 w/e to 07.07.24



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LSI Country Director UKI

KEY BRANDS

Jack Link's
– Beef Jerky Original, Sweet & Hot and Teriyaki 25g & 60g
– Biltong Original 20g & 60g
– Original Beef Bar 22.5g
– Original Beef Bar 3x22.5g
– Ham Snack 25g
– 100g Clipstrips Jerky Original and Teriyaki x 48

Peperami

– Singles, Multipack & Lunchbox Minis
– Chicken Bites
– Pizza Buns
– Vegerami
– Snackbox
– Tapas



Jack Link's

Meat is one of the best ways for consumers to get protein which is why the meat snacking category is such a huge success – and continues to grow fast. Shoppers who want a better-for-you alternative to traditional snacks like crisps and nuts are seeking out products with added benefits and Jack Link's, as the UK's No.1 jerky brand¹, delivers – offering high protein in a tasty convenient format.

Jack Link's has more than tripled in retail sales value over the last five years, reveals David Harriman, LSI country director UKI. "The jerky and biltong meat snacks category is worth over £36m in retail sales value² across total grocery and convenience and still has huge potential, as more consumers are embracing the protein snacks revolution," he says. "Retailers can profit from this fast-growing jerky and biltong meat snacks trend by stocking the proven best-sellers. Jack Link's Beef Jerky Original 25g has the highest unit ROS³ of any product in the category. We also provide a bigger 60g pack which is one of the best-performing SKUs in value ROS⁴."

Finding a home for shoppers to buy high-protein meat snacks in-store is key, he adds. "Jack Link's should be merchandised on the bagged savoury snacks fixture alongside crisps and nuts creating a permanent home where shoppers know they can always find them. Clipstrips and displays also help drive incremental sales, especially when placed next to a complementary category, such as energy drinks.



“Jack Link's is a high-protein, high-growth, high retailer profit opportunity. Peperami is the UK's No.1 chilled meat snack⁵”

“Jack Link's Jerky and Biltong do not need refrigeration and their nine-month shelf life minimises waste.”

Peperami

Peperami is the UK's No.1 chilled meat snack⁵, reveals Harriman. “The chilled meat snacks category has doubled in sales value over the last five years led by best-selling Peperami, which now sells over £123m a year⁶,” he says.

“Peperami is especially popular with families who enjoy a convenient, tasty protein-kick to pep up snacking. Peperami multipacks of five-sticks are must-stock lines, made from 100% pork, there are four flavours – Original, Hot, Firestick and Chorizo.”

Famous for its great taste, Peperami's instantly recognisable green packs and iconic brand character the 'Animal' are driving growth and significant incremental sales with successful NPD innovation, led by the launch of Chicken Bites, Pizza Buns and Tapas.

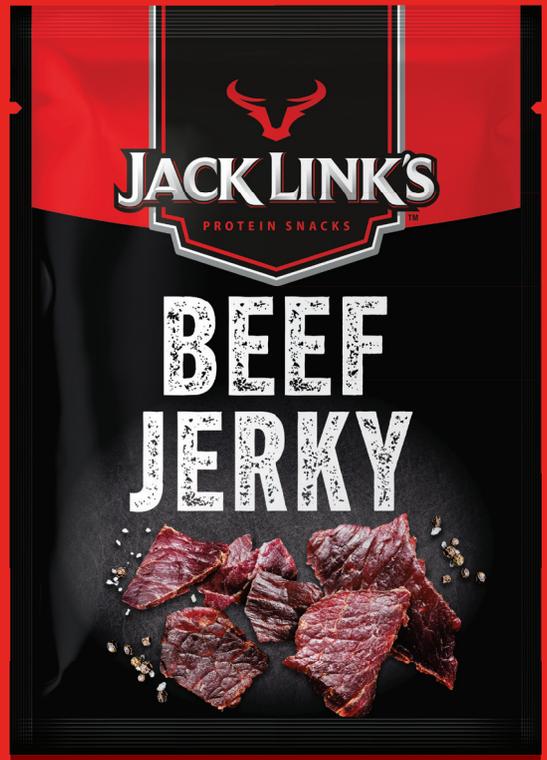
Peperami continues to be heavily advertised on TV featuring the 'Animal' and NPD to attract new shoppers to the meat snacks category, providing “a sales opportunity no retailer can afford to miss”, adds Harriman.



Source

¹⁻⁶ Nielsen, MAT to July 2024

**UK'S NO.1
JERKY
BRAND**



Nielsen MAT July 2024

STOCK-UP JACK LINK'S NOW!

ENQUIRIES EMAIL: WEBSITE@JACKLINKS.ONLINE



**NO.1
CHILLED
MEAT
SNACKS
BRAND**

*Nielsen MAT July 2024

KP Snacks

A snack for all occasions

DETAILS

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KEY BRANDS

- Hula Hoops
- McCoys
- KP Nuts
- Butterkist
- popchips
- Tyrrells
- Skips
- Pom-Bear
- Penn State
- Nik Naks
- Wheat Crunchies
- Space Raiders
- Discos
- Frisps
- Roysters

As a leading manufacturer of great-tasting snacks, KP Snacks' unique portfolio covers all segments from crisps to nuts to popcorn to pretzels, catering to all consumer occasions. Marketing director Kevin McNair says: "Our portfolio of tasty and differentiated snacks can elevate any consumer snacking occasion. With a range of market-leading brands that tap into popular consumer demand spaces, we are unlocking significant category growth potential and meeting evolving consumer needs."

Big Night In

Evening snacking represents one such occasion where popcorn plays a vital role. Butterkist is the UK's leading popcorn brand, worth £56.3m and in growth¹. With a 35.4% share of the popcorn segment², Butterkist continues to innovate with indulgent flavours that appeal to consumers looking for a unique and satisfying sharing treat. This includes the recent launch of Caramelised Biscuit Toffee Popcorn.

With an impressive 93 Great Taste Awards across the range, Tyrrells make in-home occasions feel special. With a 14.2% share of premium snacking³, the brand continues to excite and engage shoppers with new flavours, including Chicken & Sage and Wallace & Gromit Wensleydale & Cranberry.

Daytime snacking

"While the sharing occasion continues to thrive, we're seeing strong growth in lunchtime snacking as well as continued growth in the food-to-go mission," says McNair. "Daytime snacking, whether a packet of crisps as part of a meal deal or a boost between meals, represents a high proportion of occasions in-home and on-the-go."

McCoy's is a popular choice for the daytime snacking occasion, with Flame Grilled Steak, Salt & Malt Vinegar and Cheese & Onion all featuring in the top 10 meal deal choices⁴. It is also one of the top five multipack CSN brands⁵, catering to both packed lunch and in-home lunch occasions, which are growing in popularity as hybrid working continues and consumers



“Our portfolio of tasty and differentiated snacks can elevate any consumer snacking occasion”

look to economise. The brand recently expanded its multipack offering with two new additions to the Epic Eats flavour platform. Inspired by classic American flavours, Grilled Cheese and Flamin' Fajita are both non-HFSS.

"Consumers snack to boost their energy throughout the day and nuts cater to this with nutritional and functional benefits," adds McNair. KP Nuts Snack Packs, expanded to include Honey Roast Peanut Snack Packs earlier this year, are perfectly portioned for a permissible energy boost. Exempt from HFSS restrictions, nuts play into a range of occasions, appealing to increasingly health-conscious consumers.

Healthier snacking

popchips taps into the healthier snacking trend with a fully non-HFSS portfolio and a 16% share of the healthier snacking segment⁶. "With 58% of households buying into healthier snacking⁷, it's a prime opportunity for us," adds McNair. "popchips is perfectly positioned to drive penetration and segment growth, with a significant increase in non-HFSS NPD contributing to the rapid growth of healthier CSNP."

KP Snacks continues to grow its healthier snacking portfolio, with over 100 non-HFSS SKUs available and a commitment to 55% of sales coming from products which are non-HFSS or 100 kcal or less per pack by 2030.



Source

¹⁻³ Nielsen IQ, Total Coverage, Total Value, MAT to 13.07.24
⁴⁻⁶ Nielsen IQ, Total Coverage, Total Value, MAT to 13.07.24
⁷ Mintel Crisps, Savoury Snacks and Nuts, UK - 2023

CREATING
happy snacking
MOMENTS



Stock up on KP Snacks'
best selling brands!

The Mad Butcher

New premium meat snacking

DETAILS

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Managing Director
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KEY BRANDS

The Mad Butcher
– Chilli Pork Snacks (70g)
– Classic Pork Snacks (70g)

 Gourmet meat snacking brand The Mad Butcher has secured its first retail listing with Ocado, becoming the newest premium meat snacking product in grocery.

This recent listing marks the first step in The Mad Butcher's grocery journey, with two SKUs – Chilli Pork Snacks and Classic Pork Salami Snacks – currently available with the online retailer. These premium, traditionally produced meat stick products are smoked over beech wood, dried and cured to give a rich, smoky flavour.

Plan for retail growth

The Mad Butcher brand is part of Sigma Alimentos, a global food business and the largest producer of charcuterie in Europe. Already available in wholesale, Sigma now plans to grow The Mad Butcher business within the retail market, further tapping into the growing UK trend for meat snacking. The category has grown 38% since 2020¹.

Newby Groves, managing director of Sigma UK & Ireland, believes there is still room for more growth in the category, with The Mad Butcher offering an affordable product that doesn't compromise on quality. He comments: "Our significant consumer validation research has identified that current products in the market do not appeal to a broad audience seeking premium, authentic, traditionally produced meat snacks. Our brand celebrates meat-lovers and is committed to delivering the best-quality products that deliver for on-the-go snacking and social occasions."



“Our consumer validation research has identified that current products in the market do not appeal to a broad audience seeking premium, authentic traditionally produced meat snacks”

“Already available in over 150 pubs and bars UK-wide, The Mad Butcher is gaining traction nationally. The additional brand exposure from our retail launch complements our wholesale offering and is set to amplify our growth even further.”

Affordable quality

At a time where budgets are tight, The Mad Butcher wants to challenge the value perceptions of the category and show that premium snacks don't have to break the bank, explains Groves.

“As one of the largest producers of high-quality cured meats on the continent, we do everything we can to streamline our operations and reinvest savings from efficiencies back into pricing. We want to make our premium products accessible for all shoppers.

“We're thrilled to be launching into grocery with Ocado,” he says. “Its customers align perfectly with our target audience and, as a channel, it offers flexibility, which we feel is invaluable for a new brand.”

The Mad Butcher Chilli Pork Snacks (70g) and The Mad Butcher Classic Pork Snacks (70g) are available now with Ocado, priced at £2.25.

Source
¹ IRI to 12.06.22

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NEW



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Mitsuba Snacks

Asia in one bite!

DETAILS

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 w: mitsubasnacks.com

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Danielle Kranenburg
 Marketing Manager

KEY BRANDS

Mitsuba Streetfood Snackmix Thai Green Curry
 – Great Taste award winner 2024
Mitsuba Thai Chilli Crispies
 – Great Taste award winner 2023

Asian-inspired snacks are the perfect fit with current consumer trends in UK, says Mitsuba Snacks.

In the recent Innova Flavour Survey¹, one of the global snacking trends that is also applicable to the UK consumer is the ‘local goes global’ trend, where three out of five UK consumers state they are open to trying new global cuisines. When speaking to UK snack consumers, nearly a third (32%) already consume Asian-inspired snacks several times a month².

“Mitsuba’s snacking portfolio offers a broad range of Asian-inspired snacks that offer a safe flavour adventure for the consumer – from mild to spicy – and it brings new variety, which is an important driver in the bagged snack category,” says the company.

When it comes to flavour, 26% of the UK consumers buy a snack brand most often for the ‘intensity of flavour’ and 18% buy based on the brand having ‘an unique range of flavours’³ – something which Mitsuba offers in spades, it notes. “With the introduction of Mitsuba Streetfood Snackmixes, Mitsuba taps into the increasing desire to try new global cuisine flavours. The Streetfood Snackmix ranges transport taste buds straight to the vibrant streets of Asia with flavours resembling those of meals such as Beef Noodles (Vietnam), Coconut & Satay (Indonesia) and Thai Green Curry (Thailand). The latter got recently awarded with a Great Taste Award 2024. There is also an opportunity for retailers to upsell or cross-merchandise Asian Snacks alongside Asian ready meals as 87% of Asian Snack consumers also eat Asian



“With the introduction of Mitsuba Streetfood Snackmixes, Mitsuba taps into the increasing desire to try new global cuisine flavours”

ready meals, such as Indian, Thai, Chinese, etc⁴.”

Spicier snacking flavours.

Driven by younger consumers looking for greater inspiration when snacking, there’s a growing demand for Asian-inspired flavours in the UK, adds Mitsuba. This trend has also impacted the performance of different sectors within the snacking category as traditional formats such as potato crisps (-0.9%) and popcorn (-6%) experience volume decline in 2024⁵ whereas savoury bagged snacks are growing at +1.2% and nuts are up +9%.

Spicy flavours are an important growth driver within the snacks category. Sales of spicy crisps, for example, are growing +11% and now make up 10% of the crisps category sales⁶. Martyn Weller, general manager of Mitsuba UK, says: “Mitsuba offers a real opportunity for retailers to target this growing trend with its range of Asian-inspired savoury bagged snacks.”

Look out for the brand in WHSmith’s travel outlets, Iceland Big Warehouses, Ocado and various farm shops and delis throughout Great Britain. Visit www.mitsubasnacks.com/uk for more details. Mitsuba, spice up your life.



Source

¹ Innova Flavor Survey 2023 (UK), Innova Database
² TRKR survey of 1,000 UK savoury bagged snack consumers 2023
⁵ Kantar Worldpanel, 52 w/e 21.01.24

SPICE UP YOUR LIFE!



Mi-tsu-ba



mitsubasnacks



mitsuba.asiansnacks



Mondelēz International

Snacking made right

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Trebtor
Maynards Bassetts
Halls
belVita
Cadbury Biscuits
Mikado
Toblerone
OREO
Ritz
Barny

➔ Mondelez International's mission is to deliver the right snack, for the right moment, made in the right way. "We call this Snacking Made Right," says trade communications manager Susan Nash. "Within this, we've identified four key focus areas that are shaping the future of snacking."

Value

Value for money is still key as shoppers continue to look for affordable, familiar treats during these times. However, there is still space for special treats particularly for seasonal occasions, and this Christmas Cadbury is launching a new limited-edition Cadbury 200th Birthday Chunks Tin.

Wellbeing

Mondelez has introduced a range of non-HFSS innovations this year, including belVita's Soft Bakes' new non-HFSS recipe on two of its top sellers, Choc Chip and Choco Hazelnut. belVita has also broadened its non-HFSS portfolio even further, introducing a new recipe across its Baked Bar range, and a new name: Soft & Crunchy.

"Earlier this year, we added three non-HFSS products under Cadbury Dairy Milk Fruitier & Nuttier Bars," says Nash. "Made from a delicious blend of dates, apricots, hazelnuts and almonds, topped with a layer of Cadbury Dairy Milk, they boast over 70% fruits & nuts and 127 calories per bar¹, and come in multipack and single formats."

Dairylea is tapping into the growing desire for plant-based alternatives with



“Mondelēz has introduced a range of non-HFSS innovations this year, including new recipes on belVita Soft Bakes and Baked Bars, plus three new products under Cadbury Dairy Milk Fruitier & Nuttier Bars”

new Dairylea Plant-Based Dunkers, she adds. "Bursting with the great taste of Dairylea, and boasting a creamy, delicious dip, the new Dunkers is a plant-based alternative bringing the taste of cheese to lunchboxes."

Occasions

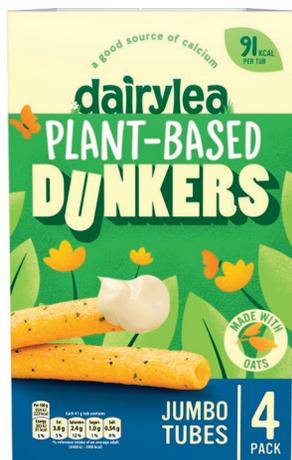
"Cost-of-living pressures have led to an increase in consumers 'eating in' more², which provides opportunities for Big Night In offers – with chocolate the top choice of product for this occasion³," says Nash. "Sharing packs continue to be popular for seasonal occasions, so we've extended our successful Cadbury Puds range with the launch of brand-new Cadbury Mini Puds."

Sustainability

Mondelez International is working towards its 2025 goal to source all the cocoa volumes needed for its chocolate brands through Cocoa Life – its sustainability sourcing program, which focuses on helping tackle the root causes of complex systemic issues in cocoa farming. As of the end of 2023, around 85% of cocoa volume for Mondelez's chocolate brands was sourced through Cocoa Life⁴ (progressing from 80% in 2022).

Source

¹ Per 30g bar in the 4x30g multipacks
² IGD 2023
³ Snackchat July '23
⁴ Goal and reported information for cocoa volume sourced is based on a mass balance approach, which means that the equivalent volume of cocoa needed for the products sold under our chocolate brands is sourced from the Cocoa Life program. Reported information for the period from 01.01.23 to 31.12.23 includes volumes from cocoa-producing countries Brazil, Côte d'Ivoire, Dominican Republic, Ecuador, Ghana, Indonesia, India, and Nigeria unless otherwise stated (which differs from prior years). This excludes markets where Mondelez International does not sell chocolate brands. Reported information based on latest estimate; independent, third-party verification in-progress. Any updates, if needed, will be included in the ESG Datasheet.



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Brunch

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RANGE**

Cadbury
DAIRY MILK

**NEW NON-HFSS
BAR RANGE**



**FRUITY, NUTTY
AND A LITTLE BIT
CHOCOLATEY**

belVita

MORNING SNACKS



**NEW NAME
NOW NON-HFSS**

Mondelēz
International

SNACKING MADE RIGHT

*NielsenIQ Defined

**Nielsen Total Coverage excl. Discounters MAT - WE: 13.07.24

Nairn's Oatcakes

Outperforming savoury biscuits

DETAILS

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KEY BRANDS

Nairn's
– Oatcakes
– Biscuits
– Gluten-free range

Source
^{1,2} NielsenIQ, 52-week data to
24.08.24

“It has been an exciting year for Nairn's as we've introduced new products across both savoury biscuits and the gluten-free category,” says marketing director Kevin Butterworth. “It has been a strong year for innovation with more in the pipeline. Nairn's is now a £50m RSV brand in grocery; our oatcakes range outperform the savoury biscuits category, with value up +8.9% and volume up +11.7%¹.

“As the wellbeing trend grows, consumers are looking for products that are better for them, but they don't want to compromise on taste,” he adds. “Nairn's is well placed to benefit from this trend as we have always focused on delicious oat-based snacks that don't compromise on natural goodness.

“As the category evolves to be more snack-focused, people are increasingly buying savoury and sweet biscuits for multiple occasions. Nairn's has a range of flavours and formats suited to meet evolving shopper needs. Our oat biscuit,



“Our oat biscuit, with up to 40% less sugar than others, has high consumer appeal”



with up to 40% less sugar than other biscuits while delivering strong taste credentials, has high consumer appeal and is driving those new occasions. This is also evident in our recent launch of Marmite Oatcakes; it is now the best-selling new line in savoury biscuits YTD, bringing incremental sales and a younger demographic into the category².”

DELICIOUS
GOLDEN-BAKED OATS IN EVERY BITE



Outperforming the savoury biscuit category with +8.4% value growth and 12.5% volume growth*

*Nielsen 52 week data to 24th August 2024



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Cocoa

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*Farmers enrolled in the new Income Accelerator Programme compared with other Nestlé Cocoa Plan farms. Source: KIT Institute

New World Foods

Meat snacking collaboration

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KEY BRANDS

KINGS®
WILD WEST®
SIDES®
CRUGA®

As the market leader in jerky and biltong¹, New World Foods has always been at the forefront of NPD and is incredibly proud of the diverse range of products it offers – from Kings 100% quality UK & Irish Beef products to Wild West’s high-protein products to Wild West’s high-protein range, says sales director Dee Quick. However, the business can never stand still and, in 2023, it began an ambitious plan to bring additional snackers into the jerky category, particularly from a younger demographic without impacting core fans or range sales, she reveals.

“We realised that reaching a younger demographic would be challenging,” she says. “Simply throwing hundreds of thousands of pounds at marketing would have been risky, and creating specific flavours that may appeal could have created a costly operational and product development issue. We knew that if we could find the right partner for New World Foods – one that appealed to our target audience and could co-create a high-quality product – we would have a chance at driving interest and sales while lowering our financial risk. In The Sidemen Group we found just that.”

The collaboration between New World Foods and Sides – the F&B brand owned by YouTube supergroup The Sidemen – was inspired by the sauces from the chicken shops expanding across the UK and has seen a wave of new flavours – Korean BBQ, Chipotle and XIX Buffalo already sell out nationwide, says Quick. “Sides is one of the fastest-growing jerky and biltong brands² – a brand that has zero impact on core range sales and demonstrates the huge opportunity within the healthy meat snacking sector,” she says.

From the initial NPD products in 2023/2024, New World Foods and Sides



“This collaboration between two superpowers has seen New World Foods and The Sidemen show how you can create quality products with longevity that can expand and grow a category”

are working on further new flavours for jerky fans, which will be sold under ‘Chicken Strips’ and ‘Steak Strips’ to encourage even more engagement from new consumers. These will hit shelves in late 2024/early 2025 and include major retailers and wholesalers.

James Newitt, CEO at New World Foods, comments: “This collaboration between two superpowers has seen New World Foods, the market leader in product development, and one of the biggest marketing and brand machines, The Sidemen, show how you can create quality products with longevity that can expand and grow a category.

“We expect this new range to sit firmly alongside our best-selling products for years to come. We hoped that our collaboration would be successful, but to create a £2m brand in just 12 months that doesn’t impact core sales or range has exceeded all expectations. We’re excited about the second flavour range to hit stores, with some incredible marketing planned across digital, in-store, OOH and earned media.”

As a fast-growing sector in snacking, the jerky and biltong adventure with Sides, Wild West and Kings continues. Watch this space.



Source
¹ Circana, MAT to w/e 10.08.24
² Circana, Last 24 w/e 10.08.24



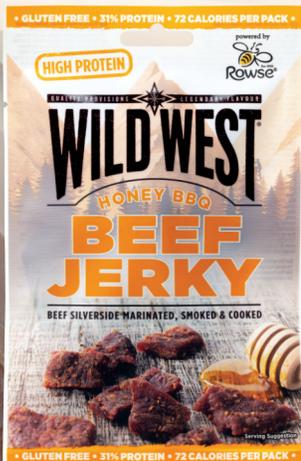
SIDES

Korean BBQ Steak Strips 'Best Seller'¹



SUPREME PROTEIN KINGS

No.1 Jerky and biltong brand made with 100% British and Irish Beef²



QUALITY PROVISIONS LEGENDARY MEAT WILD WEST JERKY

'Fastest growing jerky brand in the market'³

YOUR COMPLETE SUPPLIER FOR MEAT SNACKING

1. Steak Strips highest rate of sale line within the Sides portfolio since launch. Source: Circana Market Advantage Meat Snacking (Biltong & Jerky), Value & Unit ACV Weighted & Numeric Rate Of Sale, 52 Weeks to 10th August, Circana Major Multiples UK (Incl Multis Convenience)
2. Circana Market Advantage Meat Snacking (Biltong & Jerky), Value Sales, 52 Weeks to 10th August, Circana Major Multiples UK (Incl Multis Convenience).
3. Source: Circana Market Advantage Meat Snacking (Biltong & Jerky), Value Sales Change in the last 52 Weeks vs a year ago, 52 Weeks to 10th August, Circana Major Multiples UK (Incl Multis Convenience).



Flavours for all occasions

DETAILS

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Chief Marketing Officer

KEY BRANDS

- Walkers
- Walkers MAX
- Walkers Sensations
- Walkers Baked
- Wotsits
- Doritos
- Sunbites
- Pipers
- PopWorks
- Snack-A-Jacks

 PepsiCo continues to innovate across its snack portfolio, offering exciting flavours for all occasions, from lunchtime treats to bold taste experiences that cater to diverse consumer preferences, says Fernando Kahane, chief marketing officer at the company.

“This summer, Walkers teamed up with fellow British lunchtime icon, Heinz, to launch three limited-edition sandwich-inspired flavours, helping retailers to spruce up the lunchtime occasion,” he reveals. “The Walkers Lunch partnership kick starts year four of Walkers’ iconic CrispIN vs CrispOUT campaign and reignites the debate around crisp sandwiches among consumers.

“The three new flavours were launched to help retailers tap into the lunchtime opportunity with bold snack variations that offer increased choice through flavour, with the Heinz endorsement encouraging shoppers to trade up with the new range.”

Bold flavours

Inspired by some of Britain’s favourite sandwich combinations, Walkers Sausage Sarnie with Heinz Tomato Ketchup flavour, Cheese Toastie with Heinz Baked Bean flavour and Roast Chicken with Heinz Mayonnaise offer innovative, taste-led NPD that are non-HFSS and get shoppers talking, he adds. “With Walkers being Britain’s most-loved crisp brand¹ and 83 Heinz products being consumed every second², the flavours cater perfectly to these shopper flavour demands, while also bringing some much-needed



“Taste-led NPD is key to category growth, as enjoyment remains the number one driver of choice for shoppers⁵. We want to help retailers boost their savoury offering by providing interesting, in-demand flavours”

excitement to the savoury snacking category,” says Kahane.

“Demonstrating our continued dedication to meeting consumer demand, we introduced our Extra Flamin’ Hot platform across Doritos, Walkers Max, and Wotsits Crunchy ranges in March 2024. With Gen Z consumers having a real passion for bold tastes in their snacks³ the Extra Flamin’ Hot range caters to the growing demand for intense flavours. Since launching, the total RSV for the Extra Flamin’ Hot variants has grown to £14.4m⁴, showing consumer appetite for new and exciting snacks.”

Returning favourites

Taste-led NPD is key to category growth as enjoyment remains the number one driver of choice for shoppers⁵.

“So, at PepsiCo, we want to help retailers boost their savoury offering by providing them with interesting, in-demand flavours that get their shoppers excited,” notes Kahane. “That’s why Walkers Smokin’ BBQ Sauce joined Walkers’ core line-up this August. This presents a significant opportunity for Walkers to help retailers meet shopper preferences with a popular flavour, with the brand ideally positioned to do so as Britain’s most-loved crisps⁶.”



Source

¹ For claim verification, see www.walkers.co.uk/mostloved
Kantar Worldpanel, Feb 2022
Gen Z vs. Millennials Youth Snacking Trends Report by Knit, 01.23/Kantar % of total demog £ spend, 52 w/e 22.01.23
² Nielsen, w/e 03.08.24
PepsiCo Kantar Bolt Snacking Tracking Q2 2022 MAT, change vs Bolt Main Study 2020-2022
³ For claim verification, see www.walkers.co.uk/mostloved

**#CRISPIN OR
#CRISPOUT?**



**IT MUST BE
WALKERS AND HEINZ**

ESTD 1869

pladis

Jacob's goes for bigger Bites

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KEY BRANDS

Jacob's Mini Cheddars
Jacob's Bites (NEW)
Jacob's Twiglets

As a top 10 bagged snacks brand¹ and a pioneer in savoury biscuit snacking for the past 40 years, Jacob's Mini Cheddars continues to lead the way. A subsidiary of the nation's No.1 savoury biscuits brand², Jacob's Mini Cheddars offers shoppers a tasty oven-baked alternative in the crisps aisle.

Brits adore the brand, with one in 10 multipack bagged snacks shoppers now only buying Jacob's Mini Cheddars when choosing a cheese-flavoured offering³. Meanwhile, introducing extra sitings in-store has driven sales increases of up to 81.8%⁴, signalling a strong appetite for Mini Cheddars.

"The opportunity presented to retailers by savoury biscuits is growing every day as shoppers discover, and rediscover, the affordable and baked credentials of the Jacob's range vs other bagged snacks," says Asli Özen Turhan, chief marketing officer at pladis UK & Ireland. "This is especially relevant at a time when Brits are keen to get the best value they can, leaning on established, heritage brands they trust to deliver on value and quality.

Full-on flavour innovation

"They're also hungry for innovation and fresh twists on their favourites, which is why we're continuing to see huge success from new additions to the Mini Cheddars range," she adds.

"The addition of interesting flavours – coupled with our Effie Europe award-winning 'Welcome To Cheddar Town' marketing campaign – has helped Mini Cheddars to reach sales of £91m⁵. For example, Jacob's Mini Cheddars Red Leicester – once an



“The opportunity savoury biscuits presents to retailers is growing every day as shoppers discover, and rediscover, the affordable and baked credentials of the Jacob's range”

annual limited-edition flavour – is now a permanent fixture. Plus, our wider limited-edition campaigns have added £11.2m in additional sales for retailers⁶ – something we've driven further with two new flavours: Smoked Cheddar and Cheddar & Roasted Tomato.”

Taking a bigger bite out of snacking

Jacob's is now aiming to take an even bigger bite out of savoury snacking with Jacob's Bites – a new range of light and crispy sharing snacks that come in fully recyclable 125g boxes (RRP: £2).

Shortlisted for this November's The Grocer New Product Awards – and winning rave reviews, including a 'best products' plaudit from Good Housekeeping⁷ – Jacob's Bites come in four popular flavour combinations: Mature Cheddar & Caramelised Onion, Red Leicester, Sweet Chilli & Sour Cream and Smoked Paprika. Each box is filled with well-seasoned biscuits that have been oven-baked to crunchy perfection, with no artificial colours or flavours.

"With over 170 years' experience in savoury biscuits, we know a thing or two about creating the tastiest snacks," adds Özen Turhan. "We spotted an unmissable opportunity to unlock further growth for Jacob's, with a new range that will take it beyond the cheeseboard and into those important afternoon snacking occasions.”



Source
¹ The Grocer Top Products 2023, NIQ Scantrack, 52 w/e 09.09.23
² NIQ Data to 01.06.24
³ Kantar WPO, 52wk data to 09.06.24
⁴ Nielsen, 12 w/e 12.08.23 (Comparison Off Shelf v Fixture Sales unit growth Grocery Mults)
⁵ NIQ, Total coverage incl Discounters, LMAT data to 29.08.24
⁶ Nielsen Discover, Total Coverage data from 04.07.21-24.08.24
⁷ Good Housekeeping – 'The best products our food and drink writer tried this month', August 2024

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TOP 10 CRISPS & BAGGED SNACKS BRAND² REELING IN NEW SHOPPERS WITH FULL-ON FLAVOUR

¹ NIQ LMAT data 29.08.2024 Total coverage incl Discounters ² Kantar WPO 52W data to 09.06.2024

Rollover

Introducing new hot snacks into the

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KEY BRANDS

Rollover
– Chicken Nuggets
– Jalapeño Cheese Poppers

↙ The UK market for savoury snacking products has demonstrated remarkable growth in recent years, says Rollover. “Within this dynamic sector, the bites/ bitesized sub-category is experiencing robust growth, highlighting significant consumer demand for variety in snacking options,” it says. “This trend presents a substantial opportunity for the hot snacking category, and we want to ensure all our customers can tap into this opportunity. So, we’ve added two hot snacks to our hot food-to-go range.

Chicken Nuggets

Our premium chicken nuggets are crafted from high-quality chicken fillets, coated in a golden, crispy exterior. These nuggets are an excellent addition to any hot food-to-go (FTG) offering, appealing to adults, students, and children alike. They are easy



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dynamic food-to-go category



to prepare, with no cooking skills required, and are halal certified.

Jalapeno Cheese Poppers

These provide a delightful blend of cheese, jalapeño peppers, and seasonings, all encased in crispy wholegrain wheat breadcrumbs. This hot snack is also suitable for vegetarians, catering to a broader range of dietary preferences, and is easy to prepare, with no cooking skills required and ready in just nine minutes in the oven. The cheese poppers offer a flavourful and convenient snacking option, says the company.

All our snacks come in convenient recyclable packaging.

Rollover provides comprehensive training and full marketing support for retailers who list its products, it adds. "This includes POS materials such as bollard covers, posters and shelf wobblers, as well as digital content to enhance snacking promotions," it says.



“Within the hot snacking sector, the bite-sized sub-category is seeing robust growth”

“We can also organise sampling sessions to attract new customers to the category.

“In addition, as our snacking range caters to diverse dietary needs, it makes a great addition to meal deals, which we can support with POS to ensure maximum visibility.”



Symington's

Dialling up the flavour

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KEY BRANDS

Naked
Mug Shot
Chicken Tonight
Ragu
Oatburst

Instant hot snack (IHS) brands are fighting back after inflation-fuelled price rises saw shoppers switch to cheaper private-label alternatives in 2023 (private-label units grew by 40% YOY, branded units were down by 8%¹), reports Symington's head of brand marketing Lauren Charnock

"While private-label unit sales remain considerably higher than in 2022, this year there has been a strategic emphasis on delivering value for money through increased promotional activity – 56% of units sold were on promotion compared to 36% last year²," she says. "This has seen IHS brands reverse their unit declines and drive the category performance – total branded unit sales have increased by 5% year-on-year while the total IHS grows by 1%³.

"Evidence of this can be seen across Symington's brand, Mug Shot with unit sales up 4%⁴ supported by growth in penetration, frequency and basket size⁵. This performance maintains Mug Shot's claim of having the highest units per trip across all major IHS brands⁶."

Exciting and adventurous flavours

Tapping into the trend for exciting and adventurous flavours, the Naked brand drew on global inspiration for its core range, launching Sri Lankan Style Curry Rice, in Asda and Morrisons in July.

In August Naked further expanded its portfolio with two new ramen flavours in Sainsbury's (Miso & Chilli and Chicken Laksa) in homage to what is currently the most popular noodle dish on the planet. Charnock says younger shoppers – particularly Gen Zs – are driving real change when it comes to adventurous flavours and eating habits. "Gen Zs generally prefer to snack



"This year there has been a strategic emphasis on delivering value for money through increased promotional activity. This has seen instant hot snack brands drive the category performance"

instead of adhering to set mealtimes," she says. "Brands should aim to keep this age group engaged by giving them a wide choice of flavours, formats, ingredients and textural delights."

Social media has continued to be a crucial tool for Naked and Mug Shot, helping to drive market trends and foster a loyal consumer base, she adds. "Both brands have leveraged platforms such as Instagram and TikTok through influencer partnerships, user-generated content and competitions."

Mug Shot put power in the hands of its social media followers, launching an interactive campaign for them to vote for their favourite fakeaway flavour launch, which saw Salt & Pepper Chilli Beef Noodles back on the shelves in June.

Look out for...

Naked is launching a 360-degree brand awareness campaign in September and October, pitching its bold and adventurous flavours against 'the same boring lunch options' across catch-up TV, social and digital channels.

Mug Shot launched its Max Pot range in Asda in June, dialling up the taste across Chicken & Mushroom Noodles, Roast Chicken Pasta, Cheese & Broccoli Pasta, Sundried Tomato & Chorizo Pasta and Mac & Cheese Pasta.



Source

¹ NIQ Scantrack, Total Coverage, Instant Hot Snacks, 52 w/e 30.12.23
² NIQ Scantrack, Total Coverage, Instant Hot Snacks, YTD w/e 10.08.24
³ NIQ Scantrack, Total Coverage, Instant Hot Snacks, 52 w/e 30.12.23
⁴ NIQ Panel on Demand, Total Coverage, Instant Hot Snacks, YTD w/e 10.08.24



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KEY BRANDS

Mr. Porky
Midland Snacks
Real Pork Co
Golden Wonder
Tayto
REAL Hand Cooked Crisps

➔ Tayto Group, the UK's largest family-owned snacks business, has 'Snacking Sorted'. Its portfolio of brands including Golden Wonder, Real Hand Cooked crisps and Marmite – as well as being Britain's leading supplier of pork snacks¹ – offers retailers a snacking 'one-stop-shop'.

Profit from pork

The ultimate pub snack, pork scratchings are eaten more than twice as often at home² and their unique taste has helped pork snacks become the fastest-growing segment in savoury snacks, up 17% YOY³. Tayto has a 65% share and the market-leading, Great Taste award-winning brands: Mr. Porky (No.1) and Midland Snacks (No.2)⁴.

“Scratchings consumers are very loyal and, because of the unique taste, won't switch to another snack, so retailers not stocking pork snacks are missing out,” says marketing director Matt Smith. “Consumption peaks at the weekend and the majority are bought on impulse. Displaying scratchings prominently – ideally with BWS or other snacks – will drive incremental sales. Also, stocking more contemporary pork snacks such Mr. Porky Crispy Strips will attract more shoppers – especially those looking for a lighter alternative.

“We've just invested in our biggest-ever campaign – sponsoring coverage of PDC darts tournaments on Sky Sports,” he adds. “Running all the way into 2025, this will be seen over 300m times and is part of our mission to remind snacks consumers that there really is ‘No Matching a Scratching.’”

Marvellous Marmite

Having teamed up with Unilever, Tayto's recently launched range of Marmite snacks is performing strongly



“Scratchings consumers are very loyal and, because of the unique taste, won't switch to another snack, so retailers not stocking pork snacks are missing out”

– with Marmite crisps now the No.2 CROS 6pks in major mults⁵, he reveals. “The response to Marmite snacks has been fantastic,” says Smith. “The new range ignited significant consumer excitement with ‘lovers’ taking to social media to talk about the great Marmite taste. Marmite Crisps has seen strong sales across all channels. The launch of Marmite Tortillas, as well as Cheese & Marmite Puffs, has opened up the brand to younger consumers, with sales ahead of expectations. The good news is that we have further NPD planned for 2025.”

The power of £1

PMPs remain essential for independent retailers – accounting for 79% of sales⁶, he reveals. While sharing PMPs have been the main driver of growth, this has slowed as some brands moved above £1. However Golden Wonder has remained at £1 and is outperforming sharing PMPs (+13% vs +2%)⁷.

“By sticking to the important £1 price-point we've continued to deliver great-tasting, great value snacks with strong retailer margins. A highlight is our Transform-A-Snack brand, which is outperforming the market at 22% growth⁸, helped by our current on-pack promotion in partnership with the upcoming Transformers ONE movie.

“With 64% of shoppers willing to switch brands for a lower price⁹, the chance to profit from Golden Wonder's £1 PMP has never been greater.”



Source

¹ Circana Market Advantage, Circana All Outlets GB, Pork Snacks, Value Share, Actual, 52 w/e 17.08.24
² Norstat, May 22
³ Circana Market Advantage, Circana All Outlets GB, Pork Snacks, Value Sales, % Change vs YA, 52 w/e 17.08.24
⁴ Circana Market Advantage, Circana All Outlets GB, Pork Snacks, Value Share, Actual, 52 w/e 17.08.24
⁵ Circana Market Advantage, Major mults GB, 6pk Crisps in greater than 100 stores, CROS | Actual, 12 w/e 17.08.24
⁶ Circana Market Advantage, Symbols & Independents GB, Snacks PMPs, Value Sales, Actual, 52 w/e 17.08.24
⁷ Circana Market Advantage, Symbols & Independents GB, Snacks, Unit Sales, Actual & % Change vs. YA, 52 w/e 17.08.24
⁸ Circana Market Advantage, Symbols & Independents GB, Golden Wonder Transform-A-Snack £1 PMPs, Value Sales, % Change vs YA, 52 w/e 17.08.24
⁹ Norstat, Jan 24

SNACKING *Sorted*



United Food Brands

Boosting chilled milk snacks

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- Sugar Waffles
- Chocolate Waffles
- Toasting Waffles
- Chocolate and Hazelnut Waffles
- Kuchenmeister**
- Marzipan Stollen Loaf
- Marzipan Stollen Bites
- Marzipan Stollen Cookies
- The Flan Co**
- Large Sponge Flan Base
- Mars Croissants**
- Milkyway Croissants**
- Oreo Chilled Fresh Milk Snack**

United Food Brands, exclusive distributor of an exciting range of chilled milk snacks, with brands such as Oreo, Minions and Kung Fu Panda under its umbrella, is helping retailers add incremental growth with innovative snacking solutions in the chilled desserts category.

“Another successful year saw some of our products, including the Oreo Chilled Milk Snacks launch into several of the mults, accounting for 44% YOY value growth¹,” says United Food Brands managing director Richard Reeves.

What are chilled milk snacks?

“Chilled milk snacks are still a relatively new sub-category within chilled desserts, but we are continuing to see YOY volume growth of circa 77%²,” explains Reeves.

“Chilled milk snacks are merchandised within a heavily congested fixture, dominated by some of the biggest brands in UK retail. However, consumers are now seeking new and innovative products, and this is particularly evident among the Gen X and Gen Z demographics; this demand is allowing us to disrupt chilled desserts. Our range has a unique position as the eating occasion can be more likened to an ambient snack. Addressing this need state helps to drive incremental value to the chilled category by offering consumers more versatile snacking options.”

Food-to-go continues to grow

The out-of-home market continues to grow with 14% YOY value growth, but also with an impressive 9% volume rise³, says Reeves. “Tapping into this growth is an essential part of our strategy to increase market share for



“Chilled milk snacks are still a relatively new sub-category within chilled desserts, but we are continuing to see YOY volume growth of 77%³”

our chilled snacks,” he says. “As Gen Z seek to maintain a social and working balance, time management has become a growing concern, leading to them replacing meals with snacking on-the-go.

“In a mission to facilitate these changing habits, United Food Brands continues to develop new formats such as our front-of-store single SRP-ready packs, which will be going live into the Sainsbury’s Meal Deal from October,” he reveals.

As well as food-to-go, United Food Brands concentrates on the core chilled desserts category. “In 2024 our multipack formats launched into several new retailers and we will continue to disrupt the mainstay of the category, yoghurts, which still struggles with YOY volume decline⁴,” says Reeves. “As we operate at the premium end of the sub-category, we’ll encourage consumers to ‘trade up’ and will continue to provide incremental growth opportunities to retailers.”

Our latest NPД

“Looking to 2025, we’ll continue to focus on our core range and build on the impressive gains in 2024 but we’re also excited about our stream of NPД coming through and a new listing for our Minions, Gabby’s Doll House and Kung Fu Panda licensed movie snacks.”



Source

¹ UFB Internal sales data
^{2,4} Kantar Out-of-home, 52 w/e 09.06.24 vs Kantar Out-of-home, 52 w/e 24.12.23

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brands

Valeo Foods UK

Extending premium snacking

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KEY BRANDS

KETTLE® Chips
Manomasa® Tortillas
Metcalfe's® Popcorn

It has been another exciting year at Valeo Foods UK for product launches in the snacks category, says Jon Davis, shopper marketing manager at the company.

“We are proud to expand our iconic Kettle sharing range unlocking ridge-cut with two exciting flavours. The first is Chorizo & Red Pepper, featuring spicy cured chorizo, perfectly balanced with the sweetness of red bell peppers on a ridge-cut chip. We have also launched Sour Cream & Chive, the perfect combination of creamy, dairy rich sour cream with a pinch of fresh chive.

“There are also two new varieties for consumers looking for premium tortillas from our Manomasa range. We now have Sea Salt & Pink Peppercorn, made with a white corn base and packed with seeds – perfect for dipping. And this summer saw the launch of our limited edition for 2024, Chimichurri Steak, with tender steak, layered with hearty black beans, feisty chilli and a touch of parsley and coriander.

“All our new products are indulgent favourites suitable for sharing occasions all year round. They are also all HFSS-compliant, delivering the best possible flavour and texture experience to the consumer while staying true to our roots of having absolutely nothing artificial in our products.”

Mentoring programme

The company’s Kettle brand is a gourmet product, with a reputation of having the highest level of food quality and a superior taste, says



“All our new products are indulgent favourites, suitable for sharing occasions all year round”

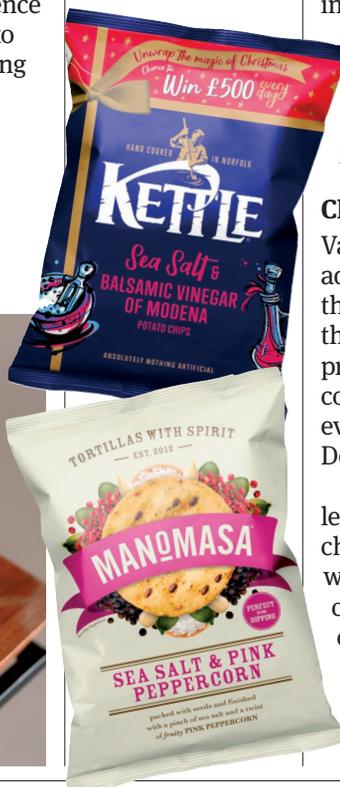
Davis. “The range is invented by a chef and crafted with passion and care,” he says. “To build on this, we have signed a commercial chef, Rachel Khoo, and together are launching the Kettle Khoo Academy, a unique mentoring programme for women seeking a career in gourmet food.

“The final five aspiring women were selected on 24th September, following input from Rachel Koo, the Kettle marketing team and the Women in Food Industry team, with the academy starting in October 2024 and running for six months to March 2025.”

Christmas promotion for Kettle

Valeo Foods UK has had strong advertising for its Kettle brand so far this year and plans to continue this theme with another exciting on-pack promotion for Christmas, offering consumers the chance to win £500 every day between 16 September and 9 December, reveals Davis.

“This campaign will be visible in leading press and key social media channels, including Instagram, where we will feature a luxury advent calendar to give consumers even more opportunities to win with Kettle. It will of course be supported with in-store and online activation in the major retailers, plus a massive sampling campaign.”



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