

# Snacking





# Contents/Analysis



<b>Analysis</b> .....	<b>3</b>	<b>KP Snacks</b> .....	<b>26</b>
A combination of high-in fat sugar and salt (HFSS) legislation and consumers keen to adopt healthier diets has put the focus firmly on 'better for you' products over the past year. That said, the cost-of-living crisis has prompted shoppers to seek out value, although affordable treating is still a key driver for impulse purchase. Discover how suppliers are innovating to meet the multiple consumer demands placed upon them and which ingredients are proving on-trend as the category faces into 2024.		Delivering a diverse portfolio to drive category growth	
<b>Calbee UK</b> .....	<b>10</b>	<b>Jack Link's</b> .....	<b>28</b>
Accelerating its performance with affordable products		Offering high-growth meat snacking opportunities	
<b>Coopenoix</b> .....	<b>12</b>	<b>Nurture Brands</b> .....	<b>29</b>
Bringing quality French walnuts to the UK market		Providing a one-stop shop with its broad portfolio	
<b>Lactalis Nestlé Chilled Dairy</b> .....	<b>13</b>	<b>Mitsuba Snacks</b> .....	<b>30</b>
Driving growth with high-protein snacking options		Arriving in the UK with authentic Asian flavours	
<b>European Snacks Association – SNACKEX</b> .....	<b>14</b>	<b>Mondelēz International</b> .....	<b>32</b>
Inviting professionals to its unique snacking event		Identifying focus areas that shape snacking's future	
<b>Forest Feast</b> .....	<b>16</b>	<b>Nestlé UK &amp; Ireland</b> .....	<b>34</b>
Pushing the boundaries to elevate quality snacking		Developing the baby and toddler snacking market	
<b>General Mills</b> .....	<b>18</b>	<b>PepsiCo</b> .....	<b>36</b>
Shining the spotlight on 'better for you' brands		Revealing how Gen Z is driving snacking habits	
<b>Graze</b> .....	<b>20</b>	<b>pladis UK&amp;I</b> .....	<b>38</b>
Pioneering reformulation with quality and taste		Engaging consumers via its strong brand assets	
<b>Grenade</b> .....	<b>22</b>	<b>Symington's</b> .....	<b>40</b>
Building on the success of its high-protein launches		Diversifying the instant hot snacks category	
<b>KIND Snacks</b> .....	<b>24</b>	<b>Tayto Group</b> .....	<b>42</b>
Keeping kindness at the heart of its healthy ethos		Helping retailers profit from pork scratchings and PMPs	
		<b>Trigon Snacks Trading</b> .....	<b>44</b>
		Filling a snacking gap with 'good, better, best' solutions	
		<b>Valeo Snackfoods</b> .....	<b>46</b>
		Using a seasoned approach for tasty, textured snacks	

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# Firm focus on 'better for you'

**Shopper demand and legislation are driving interest in healthier snacks, and suppliers are innovating constantly to keep consumers invested**

Whether it's a direct result of the high in fat, sugar and salt legislation – or a combination of this and the pressure from Gen Z consumers for products to fit their healthier lifestyles, there is little doubt that the 'better for you' (BFY) sector of the snacking category is firmly in the driving seat right now.

Yet shoppers' love of snacking relies on a wide range of other factors, from taste to indulgence or simply on-the-go impulse.

So, in a crowded and competitive arena against the backdrop of a cost-of-living crisis, with products ranging from savoury to sweet and calorie-controlled to functional (to name a few), innovation is key for brands to retain consumer interest. And, despite the marketplace challenges, NPD is rife.

## Overall performance

When it comes to snacking, it's clear that Brits haven't lost their appetite: the total crisps, snacks and nuts segment is worth £4.16bn and growing at 13.8%<sup>1</sup>," says PepsiCo chief marketing officer Fiona Tomlin. "Crisps and snacks are the second-biggest segment in the category, making up 44% of all snacking occasions<sup>2</sup>."

As often happens in a tough economy, savoury snacks are performing well as consumers look to affordable treats to lighten the mood, outperforming total store at +13.4% vs +7.5%<sup>3</sup>, says Tayto Group marketing director Matt Smith. "Inflation has been the main driver of growth, with units only growing 0.3%<sup>4</sup>," he says. But beneath this, a key dynamic has been the shift into private-label as consumers look to economise.

As with many other categories, inflation has driven growth across crisps, snacks and popcorn, agrees Claire Hooper, marketing director at Calbee, with value impacted by higher prices and fewer promotions. This has resulted in a +14% value performance for the category but -1% decrease in volume<sup>5</sup>. However, the strength of the category lies in its 98% household penetration<sup>6</sup>, she notes, making it one of the few categories across grocery to gain shoppers. That said, there has been a definitive shift in shopper behaviour with consumers seeking value to help them cut their grocery spend without compromising on their crisp and snack purchases, she adds.

Mitsuba Snacks country manager UK Martyn Weller says bagged savoury snacks in GB are now worth £3.53bn



## Analysis

and are growing by 5.3%. He also agrees that the rise has “almost entirely been driven by price inflation, with the average bagged snack becoming 12p more expensive year on year<sup>8</sup>”. And he points to fewer promotions, with sales sold on deal having fallen by £130m<sup>9</sup>. “As we’re seeing in many categories, own-label products are performing strongly. In bagged snacks own-label products now account for 39.4% of volume up from 35.9% in 2022<sup>10</sup>,” he says. “However, the role of branded products is vital to help drive category growth. The average price per pack for an own-label bagged snack is £1.25 compared to £1.49 for a branded equivalent<sup>11</sup>. So for every buying occasion where a shopper switches from brand to own-label the category loses 24p.”

Despite the cost-of-living crisis, sweet biscuits are continuing to perform strongly, with occasions growing by 454m<sup>12</sup>, says Asli Özen Turhan, chief marketing officer at pladis UK&I. “In fact, this represents nearly half of the total growth in macro snacking occasions since 2019<sup>13</sup>, meaning that sweet biscuits are massively over-performing, so retailers need to be stocking up.” Meanwhile, putting extra sitings of savoury biscuits in-store have been shown to create sales increases of up to 81.8%<sup>14</sup>,” she adds.

Jack Link’s UK sales director David Harriman says the jerky and biltong meat snacks category is one of the fastest-growing across the total store and is now worth £32m retail sales value<sup>15</sup>. Rising both in value (+10%) and units (+4%) YTD<sup>16</sup>, he says the category has more than doubled over the past five years and has headroom to double again as still fewer than one in 10 households buy it.

As for the instant hot snacking category, this is worth £393m annually and is in strong value growth of 17.1%<sup>17</sup>, says Symington’s head of category and marketing Helen Scott. “New shoppers have been driving growth ahead of total ambient grocery,” she reveals, adding that inflation at total category level is high (+22%), making it a challenging environment for brands to grow

Snacking nuts has been challenging over the last 12 months, predominantly because it is so heavily private-label driven and it has taken a while for retailers to move pricing in line with inflation and this has had an impact

on profit margins, says Luke Pagarini, chairman of Trigon Snacks. “Also, innovation is slow compared to other snacking categories where brands have the biggest share,” he says. “However, the latest data now shows growth in both value and volume.”

Coopenoix, the French walnut cooperative, has seen an increasing trend across Europe for ready-to-eat snacks, which is boosting sales of walnut kernels, despite the fact that in-shell walnuts remain the business’ flagship product, reveals CEO Didier Catel. Although not yet in the UK, the business has a loyal client base, supplying leading supermarket chains across Europe, and has seen greater demand for smaller units against the backdrop of the cost-of-living crisis.

### Better for you

Emphasis on the ‘better for you’ (BFY) sector currently extends category-wide.

Within snacking, BFY products continue to be a key driver of growth as shoppers look for ways to improve their diets, says Joanna Allen, CEO at graze. “In fact, 61% of consumers are actively looking at the number of calories on snacking products, a significant increase versus 2021<sup>18</sup>. Over the past year, we have continued our mission to challenge the notion that healthy and delicious cannot co-exist. Ninety-five per cent of our range is now HFSS-compliant and, as of October 2022, the sugar content in our top six lines has been reduced by 14%.”

BFY, which has a 15% share of the total crisps and snacks category<sup>19</sup> is experiencing accelerated growth (+18% YOY<sup>20</sup>), which stems from HFSS restrictions driving NPD and reformulation across the category, says Calbee’s Hooper. Alongside existing HFSS-compliant snacks, such as Harvest Snaps, the company has reformulated products within its Seabrook range, making its Sour Cream & Onion Rings and Salt & Vinegar Fries compliant with the legislation.

Meanwhile, KP Snacks group sales director Andy Riddle says the company is committed to 55% of its sales coming from non-HFSS or 100 kcal or less per pack by 2030. Its popchips brand is the No.1 BFY brand in sharing with a 16% share of the healthier snacking segment<sup>21</sup>, he adds.

In the last year, consumers’ increasing interest in nutrition and



wellness has driven the growth of snacks at the healthier end of the spectrum, says General Mills head of snacks JP Del Carmen. “Whether that’s lower-calorie options or products that are boosted with functional benefits, research has shown that 40% of households state a clear preference for healthy snacks<sup>22</sup>. This puts the BFY category in a strong position, totalling £706.5m value sales and a 6% uplift<sup>23</sup>. “People are showing greater awareness of nutrition and want to combine both an enjoyable eating experience with boosting their intake of certain nutrients – but in an affordable way<sup>24</sup>,” he adds. “As a result the importance of protein remains an unwavering trend and an important purchase criterion in the snacking category.”

Nurture Brands has seen success with its Emily Veg Thins in impulse formats,





**£4.16bn**

Value of the total CSN segment in the UK<sup>1</sup>

*Nielsen*

**98%**

Household penetration for crisps, snacks and popcorn<sup>6</sup>

*Kantar*

**18%**

Growth of the 'better for you segment' in crisps and snacks

*Kantar*

**£66m**

RSV of the mint chocolate category<sup>v</sup>

*Nielsen*

which managing director Adam Draper says is an indication that consumers are looking for new healthier alternatives that don't compromise on taste. "We'd like to see this trend reflected in back of store, allowing consumers more choice beyond beige potato crisps in sharing formats, after ranges were cut post-pandemic," he says. He also points to the company's Emily Seaweed Crisps, which he describes as "a superfood alternative to traditional potato crisps", alongside more ethical choices such as its palm-oil free Doisy & Dam chocolate.

There is no need to sacrifice indulgence for health, maintains Kind Snacks' category manager Alice Jeavons, who says taste is the No.1 purchase driver of healthy snack bars<sup>25</sup>. "Kind is an entryway to permissible indulgence where shoppers can satisfy a craving for a sweet snack while

fuelling themselves with nutrient-dense ingredients."

Globally, the shift towards healthy snacking has had a positive impact on walnut consumption and that looks set to continue, says Coopenoix's Catel. "Walnuts boast many health benefits with positive repercussions for the heart, brain and reproductive system," he says. "Our walnuts are natural sources of vitamin E, folate, ellagic acid, which has antioxidant and anti-inflammatory properties. They also help to lower cholesterol."

Meanwhile, many more shoppers are realising the nutritional benefits of high-protein meat snacks, says Jack Link's Harriman. As well as beef jerky, the company manufactures biltong and has recently introduced Ham Snack, made of 100% lean pork and containing more than 50% protein, he

reveals. "As more shoppers search out high-protein, tasty convenient snacks that are healthy alternatives in both the grocery and convenience sectors, the opportunity to meet shopper demand and unlock additional sales is huge."

Healthy snacking is increasingly extending into the baby and toddler sector, as parents and caregivers seek nutritious, no added salt or sugar options beyond fruit and vegetables during the weaning period, says Vanessa Lessing, infant food lead at Nestlé Nutrition. "Child-specific snacks can be a useful alternative to complement the weaning diet and help support autonomous feeding," she says. "Snacking in between meals can be a useful way to add extra nutrition to a child's diet, as well as giving them the opportunity to explore and build a healthy relationship with their food."



## Analysis

At Mondelez International, home of the Cadbury chocolate brand, trade communications manager Susan Nash, says the company announced patented technology last December, capable of creating alternative versions of its chocolate and biscuit brands, with the potential for up to 75% less sugar and fat, and reduced calories. This is the latest development in the company's goal to offer consumers more choice when it comes to snacking mindfully and managing their overall diet, she says, and is the first time the company has produced technology that may be able to make these reductions to such an extent.

### HFSS impact

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

A major impact in supermarkets has been the restriction for savoury snacks on gondola ends, adds Smith. "The convenience sector has been impacted less as most stores are not large enough to be subject to regulations. This is one reason why convenience is outperforming major multiples in savoury snacks (+1.1% vs -2.6%)<sup>26</sup>."

Prior to HFSS legislation being implemented, planning how to maintain visibility of BFY snacks once the ban came into place was the number one priority for many brands in the category because a large part of snack sales come through impulse purchases, notes General Mills' Del Carmen. "At General Mills, we proactively provided guidance to our retailer partners, including advising to section off snacks that are specific to health needs and making sure these ranges are placed centrally in-store, to align with the legislation and maximise visibility with shoppers," he says.

Graze's Allen points to evidence that the HFSS legislation is starting to create positive changes. "With the increase in sales of HFSS-compliant



products<sup>27</sup> and with 56% of UK adults more likely to buy a product that has been reformulated to meet the HFSS guidelines, the demand for healthy snacking is clearly front of mind for shoppers," she says.

HFSS-compliant products saw a double-digit increase of 16.2% compared to YA<sup>28</sup>, which suggests a growing preference for these options, even in challenging times, says PepsiCo's Tomlin. "Health is firmly on the agenda and... we don't expect this trend to go away." Since setting a target last year for 50% of its snacks to come from products that do not classify as HFSS or from products in portions of 100 calories or less, the company is now over halfway to reaching this goal, after only a year into its initial three-year investment of £35m to drive product innovation and reformulation, she reveals.

Innovation in response to the HFSS challenge is still rife. "It has been

incredible to see how the wider treats and snacks category has taken HFSS in its stride," says Kind Snacks' Jeavons. "Despite initial challenges, there have been high levels of innovation, which not only engage shoppers in the category but make them healthier in the process. In addition, the category has been growing penetration at a faster rate than previous years and we see more shoppers switching from confectionery to healthy snack bars."

While over 50% of its snacks are non-HFSS, Forest Feast introduced a specific vegan range into the market earlier this year, replacing cow's milk with almond milk in the recipe, reveals marketing director Bronagh Clarke. "It is one of the only chocolate snacks available on the market that is non-HFSS, so it poses a great opportunity for the trade to offer something sweet at front of store," she says.

Meanwhile nuts are exempt from HFSS location restrictions, so offer a



# Sweet flavour development

On-trend and relevant new flavour innovations is one of the key drivers of sales within the chocolate confectionery category<sup>i</sup>, accounting for 28% of category growth<sup>ii</sup>, says Mondelez trade communications manager Susan Nash. “In particular, caramel is performing well with salted caramel ranked as the fourth most popular chocolate NPD flavour<sup>iii</sup>. Mondelez has tapped into this trend with the launch of a new Cadbury Dairy Milk Salted Caramel tablet, she reveals.

Other launches from the company include a new limited-edition flavour

Cadbury Twirl Mint and a Cadbury Dairy Milk Winter Orange Crisp (360g). “Mint is an incredibly popular flavour among shoppers as one of the top five flavours for standard chocolate<sup>iv</sup>,” adds Nash. “With the mint chocolate category as a whole worth £66m RSV<sup>v</sup>, it presents a significant opportunity for retailers.”

At pladis, the launch of White Chocolate Digestives has seen the brand achieve a value of £1m<sup>vi</sup> after only six weeks on supermarket shelves, reveals chief marketing officer Asli Özen Turhan. “The best news is that we are attracting new, younger shoppers to McVitie’s Chocolate

Digestives, with 70% of White Chocolate Digestives shoppers claiming not to have purchased Milk Chocolate Digestives in the last year<sup>vii</sup>. The company has also announced the launch of a “new on-trend flavour” for its Jaffa Cakes brand – Rocking Raspberry.

Following the success of its Grenade Oreo Milk Chocolate, the company has followed this up with the launch of Oreo White, made with Oreo crumb and crème combined with the triple layer of a Grenade protein bar. This, says MD Phil Greenhalgh, has “truly blurred” the lines between confectionery and healthier snacking.

Chocolate continues to be the most desired flavour of sweet snackers in the UK, says Kind Snacks category manager Alice Jeavons. The company’s most recent flavour, Chocolate Chip Cashew, has been one of the few HFSS-compliant bars to incorporate chocolate, she says.

General Mills has introduced a new Banoffee Flavour to its Fibre One 90 Calorie range of permissible doughnuts, says head of snacks JP Del Carmen, adding: “This dessert-inspired doughnut taps into consumer demand for ‘ultimate indulgence’ offering great flavour, texture and a high fibre content.”

huge opportunity, says KP Snacks’ Riddle, who maintains the company is driving incremental consumer occasions with flavour and format innovation. Its popchips range is non-HFSS and the brand recently made its debut in the popcorn category.

For nuts, there is an opportunity to capitalise on the HFSS legislation by repositioning and growing nut snacking, agrees Trigon Snacks CEO Mayank Bali. “Calling out the inherent health benefits and educating consumers can help drive sales. We are constantly monitoring salt and sugar levels in our [Big D] brand to ensure they are in line with the rest of the market. However, taste and flavour are still the most important considerations for consumers when buying snacks, so the main focus of the brand is ensuring we provide great taste, consistently excellent quality and value for money.”

Coopenoix’s Catel believes HFSS legislation can only be a positive

for its business, as walnuts are “a genuinely healthy snacking option”. “Globally, the shift towards healthy snacking has had a positive increase on walnut consumption that looks set to continue,” he adds.

At the sweeter end of the market, Grenade MD Phil Greenhalgh says the legislation has meant that HFSS-compliant flavours such as Caramel Chaos and Dark Chocolate Mint have become some of the company’s fastest-growing SKUs. “Having these snacks available for retailers to offer in impulse, promotional space drove sales into these particular flavours. However, customers continued to pick up favourites such as Chocolate Chip Salted Caramel from traditional fixtures, maintaining sales of the existing range.”

Meanwhile, Cadbury launched its first-ever range of non-HFSS treats this year, reveals Mondelez International’s Nash. “Cadbury Dairy Milk Fruiter

& Nuttier Trail Mix features a mix of fruits (raisins, sultanas, cranberries), nuts (roasted almonds and hazelnuts) and Cadbury Dairy Milk chocolate buttons, all dusted with cocoa powder,” she says. In addition, the company’s belVita brand expanded its non-HFSS Soft Bakes range to include Blueberry and Golden Oats flavours.

While the introduction of HFSS legislation has initiated a subtle shift towards healthier snacking choices, the majority of shoppers remain largely unaware of the regulations and their implications, resulting in only limited changes in purchasing habits, says pladis’ Turhan. “That said, we’ve seen a flurry of new non-HFSS launches in the crisps & snacks category, including our duo of Jacob’s Crinklys, as well as Jacob’s Mini Cheddars 30% less fat. This, alongside crisps & snacks having greater visibility across stores via secondary sitings, has driven growth. “On the flipside, when it comes to



## Analysis

sweet biscuits, shoppers still want to snack on their favourites – meaning they are making the extra effort to head to the biscuit aisles to find them.”

The HFSS legislation has been beneficial for some of Nurture Brands’ products, but not all, comments Draper. “The broad-brush approach in which the legislation has been implemented means some of our products that are genuinely better alternatives, such as our plant-based The Primary Pantry Protein Bars made with all natural ingredients, are classed as ‘unhealthy’ due to their natural properties, like the high sugar content of fruit or the fat content of nuts. We’d like to see a more pragmatic approach to helping consumers choose healthier alternatives.”

### Wider market drivers

With the cost-of-living crisis ongoing, Mitsuba Snacks’ Weller says the most important driver at the moment is value for money (46%), followed by overall taste (44%)<sup>29</sup>. And value for money is not just about pricing, he says. “It’s also about making shoppers feel they are getting value for money from what they are buying – the brand, the quality of the physical product, portion size, texture, flavour and authenticity.”

Tayto Group begs to differ, saying value for money remains the third most important reason for snacks purchase, after flavour and quality, with over 90% agreeing<sup>30</sup>. “However, especially in convenience, shoppers worry that they will pay more for shopping locally and PMPs give them confidence that they are not being ripped off. That’s why PMPs have increased to 77% of snacks in symbols & indies<sup>31</sup>,” says Smith. “£1 PMPs have been the main driver of category growth.”

Of the drivers for consumption of instant hot snack products, convenient formats are top of the list, says Symington’s Scott. “However, our portfolio of products do help shoppers make considered choices being free of MSG, artificial ingredients and helping them understand their calorie intake.”

Jack Link’s Harriman highlights the importance of in-store siting to drive impulse purchase of high-protein meat snacks. “Making a permanent home, ideally on the main fixture with other bagged snacks, especially next to crisps and nuts, will drive sales,” he says.



### Spicing up snacking

In terms of savoury flavours, spice is still leading the field, with a notable emphasis on Asian styles.

Bold flavours inspired by modern street and fast food are a current trend in the category, says Calbee’s Hooper. “Seabrook has capitalised on this with our new Loaded Curly Fries in Sour Cream, Bacon & Chive, Nacho Cheese & Jalapeño and Cajun Spice flavours,” she notes.

Street food has gained popularity over the past five years, agrees Trigon Snacks’ Bali. “Authentic flavours from different cultures appeal to consumers looking for new experiences. We are experimenting with global flavours and are in the process of collating feedback on the most popular ones.” Meanwhile, the boundaries between sweet and savoury continue to blur, she says, with sweet & spicy/sweet & salty products becoming more commonplace. “Favourable taste tests have show

popularity around sweet & spicy NPD we have developed.”

Graze has also taken a spicy approach with a peri-peri flavour introduced to its Crunch range. This, says Allen, shows that healthy can still mean delicious and while graze’s Crunch range has grown by 18% in the past year, research shows the new flavour is the brand’s most appealing to date, with purchase intent testing at 75%<sup>32</sup>, she notes.

On the savoury side, UK consumers still love classics like salt & vinegar, BBQ and spicy flavours but the specifics of these flavours are being driven by Asian and South American influences, such as sriracha, gochujang and chamoy, says Forest Feast’s Clarke. “We are also seeing more pick-up from umami flavours, so this year we launched a limited edition Truffle & Pecorino Cheese Roasted Nut Mix.”

With the rise of Asian cuisine an ongoing trend throughout Western





# What's next for the UK snacks market?

While health will continue to be important, catering to the Big Night In occasion in an ongoing cost-of-living crisis is an area that many brands are addressing.

Taste, health and creating moments of joy are what will shape the future of snacking over the next year, says PepsiCo chief marketing officer Fiona Tomlin. "The savoury snacks category has faced challenges such as HFSS, but has shown real resilience, demonstrating a strong response from suppliers with reformulations and NPDP, but also reiterating that consumers still want to enjoy the simple

pleasures of snacking and favour great taste above all."

"Offering shoppers everyday value without compromising on taste will be a key driver for the snacking market," agrees Calbee marketing director Claire Hooper.

At pladis, chief marketing officer Aslı Özen Turhan notes: "Our prognosis is that snacking will continue to outpace the growth of total grocery over the next year, with the current trends still influencing shopper behaviour and brands continuing to invest heavily in the category." While this will create opportunities for

shopper engagement across the category, she points to savoury biscuits as "a sleeping giant and a significant area of opportunity" going forward.

Snacking occasions are continuing to grow... with the percentage of consumers who snack and the average number of snacks per day both rising<sup>viii</sup>, says Mondelez trade communications manager Susan Nash. "At the same time, consumers will stay mindful of what they consume," she adds.

With consumers recognising the importance of more conscious eating, healthier snacking is set to continue its growth, says Grenade MD Phil Greenhalgh.

Forest Feast marketing director Bronagh Clarke points out that the UK lags behind markets like the US and Australia on dried fruit and nut consumption, where these are seen as healthier snacks and a source of positive nutrients. "There is a huge opportunity to grow sub-categories like trail mixes," she says.

Overall, innovation is key to driving excitement in the category – through new flavour, new formats or even new products, sums up Tayto Group marketing director Matt Smith. "If NPDP can both taste great and have healthier credentials, then that is a recipe for success."

Europe, Mitsuba is confident that its authentically Asian inspired portfolio will appeal to UK consumers, as it taps into the need for Asian snacking occasions, says Weller.

Even the hot snacking category is shedding its past reputation for traditional flavour snack pots, says Symington's Scott. "We see an evolution in exciting, bold and unique flavour variants, sparking a growing trend of younger consumers entering the category – household penetration in under-35s is 77%, up 2.8% vs YA<sup>34</sup>," she reveals. "This is reflected in the growth of more premium and Asian flavour brands such as Naked." The brand has recently launched Naked Thai Style Sriracha, which has been available in Tesco from 21 August.

Having introduced McCoy's Epic Eats this year, KP Snacks recently expanded the range with new multipack SKUs: McCoy's Epic Eats Chip Shop Curry Sauce and McCoy's Epic Eats Bangin'

BBQ. The new products are non-HFSS and have 45% less salt than the McCoy's core range, explains Riddle. The company also delivered new flavours on its Tyrrells brand "to keep consumers invested", he says, launching Tyrrells Tomato & Chilli Chutney and Tyrrells Black Garlic & Sour Cream.

At PepsiCo, Tomlin reveals that Gen Z is "a big demographic" for the company, with this sector having "a love for intense tastes in their snacks<sup>33</sup>, especially flavours that can be found in their favourite fast foods", says Tomlin.

To target these younger consumers, Walkers Max teamed up with Pizza Hut to launch two new products: Walkers Max Pepperoni Feast and Walkers Max Texan BBQ, both of which are also non-HFSS. "By offering younger shoppers the indulgent taste of these classic toppings on the well-loved ridged crunch of Walkers Max, we hope to offer maximum flavour," she says.

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- <sup>26</sup> Nielsen, Total mkt excl discounters, P1 2022
  - <sup>27</sup> Nielsen, Total mkt excl disc, MAT to w/e 26.12.21
  - <sup>28</sup> Nielsen, Ad-hoc web, Total mkt excl disc, Total Std Chocolate MAT to w/e 21.05.22
  - <sup>29</sup> Nielsen, info on mint in Total Std Choc, w/e 25.02.23
  - <sup>30</sup> Nielsen data to 12.08.23
  - <sup>31</sup> Kantar, 52 w/e 06.08.23
  - <sup>32</sup> Mondelez 2022, State of Snacking



Calbee UK

# Value switch propels Calbee

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Marketing Director

KEY BRANDS

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

“As the fastest-growing major UK manufacturer, with some of the fastest-growing brands in the category this year<sup>1</sup>, Calbee’s promise to deliver consistent value and great taste is accelerating its performance in the crisps, snacks and popcorn category,” says marketing director Claire Hooper.

With retail sales over £93m<sup>2</sup>, Calbee is growing ahead of the category with value sales up 19%<sup>3</sup>. “At a time when many established snack brands are experiencing a decline in volume as prices rise, Seabrook – and our healthier snacking brand Harvest Snaps – are resonating with consumers making the switch to products that taste great and are affordable, driving volume by +3%<sup>4</sup>,” reveals Hooper.

Seabrook has now reached retail sales of over £86m<sup>5</sup>. Established almost 80 years ago with its iconic crinkle cut crisps, the brand is now attracting a new, younger shopper demographic, she says.

Innovative crunchy snack brand, Harvest Snaps, crafted from vegetables such as lentils and chickpeas and using a production process that preserves their natural nutrients and flavours, is also performing strongly, as the fastest-growing brand in the better for you category<sup>6</sup>.

**Multipacks: household staples**

Multipacks are proving more resilient than some other formats, with volumes returning to 0.5% growth in the latest 12 weeks, driven by crisps<sup>7</sup>.

“Multipacks are a household staple for many families, perfect store cupboard items for lunches and snacking,” she notes. “In crisps, as budgets tighten, we’ve seen a trend away from larger packs with higher price points into medium and smaller packs.

“Seabrook is contributing to this sector performance, as the number 2 multipack crisp brand by volume<sup>8</sup>, as shoppers choose the brand for its great-tasting everyday value credentials,” she adds.

While value and volume are key growth drivers for Calbee, innovation



“Seabrook Crisps and Snacks have carved out a unique role in the category”

is also helping the brand to extend its range, driving shopper interest and impulse sales.

In fact, following investment in its production capability, Seabrook launched Loaded Curly Fries and Seabrook Crunchies potato snacks earlier this year, which are expected to impact positively on sales.

**Brilliant by the bagful**

Continuing its journey of innovation and evolution, Seabrook recently unveiled a fresh new look and an updated logo. The tagline ‘Brilliant by the Bagful’ takes centre stage in this new design, capturing the essence of the brand’s commitment to providing exceptional value and taste in every bag.

**Value landscape**

“In a landscape where affordability and quality are at the forefront of shoppers’ minds, Seabrook crisps and snacks have carved out a unique space. Through the brand’s unwavering dedication to delivering value, taste and variety, it has not only captured the attention of a new generation of shoppers, but has also carved out a unique role in the category,” Hooper concludes.



Source  
<sup>1-6/8</sup> Kantar, 52 w/e 11 June 2023  
<sup>7</sup> Kantar, 12 w/e 11 June 2023





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## Coopenoix



# UK opening for French walnuts

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### KEY BRANDS

ALP'NOIX

Coopenoix is on a mission to make French walnuts the UK's favourite healthy snack. "French walnuts are best appreciated for their flavour, but the nutritional value is also a huge plus, making them one of the healthiest ready-to-eat snacks," says CEO Didier Catel. "Our walnuts are popular in supermarkets across Europe, with Carrefour and Aldi two of our biggest customers, and we're certain there's a place for them on UK supermarket shelves, too – as a snack, but also in the salad, cheese and baking aisles."

Coopenoix's collective of 400 nut growers, with 3,500 hectares of orchards in the French Alps, produce 7,000 tonnes of walnuts each year. The growers are committed to the highest environmental and agricultural standards, going above and beyond even France's strict regulations, which guarantee durable and traceable production. "The delicious flavours of French PDO walnuts, the methods our growers use and our local, carbon-neutral production set us apart from other global nut producers," says Catel.

Coopenoix is now developing new flavours, such as salted and herb walnuts, to respond to UK consumer demands. Sold under its Alp'noix brand or as own-label, Coopenoix is flexible when it comes to packaging, willing to create new pack sizes and designs.

"Our aim is to ensure our growers receive fair payment and treatment, so they can continue to produce the world's best walnuts," he concludes.



Lactalis Nestlé Chilled Dairy

# High-protein snacks driving growth

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KEY BRANDS

Nestlé Lindahls Kvarg  
Nestlé Lindahls Pro+

UK consumers increasingly seek healthier and more affordable options for snacking. This means brands will need to deliver nutritionally complete and HFSS-compliant products to align with the evolving health goals and demands of target audiences. Nestlé Lindahls' range of high-protein, low-sugar and either fat-free or low-fat products, have rapidly driven growth in the high-protein yogurts and chilled desserts sector since launching into the UK market in 2018, says the company.

Alongside consumers' growing interest in health and nutrition, there is a "higher interest in products that deliver more nutritional ingredients without compromising on taste", says brand manager Priyanca Masrani. Lindahls has responded to this demand by introducing a new Blueberry Muffin flavour to its more indulgent Pro+ range, available in a 150g pot and containing 18g of protein, plus a unique mix of 50/50 whey casein



“Our tasty, indulgent products offer consumers protein-packed snacking”

protein. Lindahls has also launched a coconut protein snack bar, which has 6.4g protein per serving and is now available in selected Asda stores.

“Our tasty, indulgent products offer consumers protein-packed snacking at home or on the go,” adds Masrani. “Lindahls, now worth £42.4m<sup>1</sup>, boasts a wide range of flavours across its core Kvarg, Pro+ and Protein Puddings.”

Source

<sup>1</sup> Circana All Outlets, Yogurts & Chilled Desserts, Value sales and % change vs YA, 52 w/e 15.06.23

— INTENSELY —

# GOOD

Lindahls is leading the High Protein Chilled Yogurts and Desserts segment with sales of £42M, growing at 56% year on year\*

Highest purchase repeat rate in the High Protein category at 50%\*\*

**PROTEIN**

## KVARG — PUDDING — PRO+ KVARG

Reg. Trademark of Société des Produits Nestlé S.A.

\*Source: Circana All Outlets, Yogurts & Chilled Desserts, Value sales and % change vs YA, 52 w/e 15 Jul, 23. \*\*Source: Kantar Worldpanel, data ending 09th of July 2023, 52w/e.)



European Snacks Association – SNACKEX

# The heart of savoury snacks

DETAILS

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KEY CONTACTS

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KEY BRANDS

SNACKEX

➔ Snackex has a consistent history of 50-plus years and is considered the ultimate event to showcase savoury snacks and nut products, network with industry professionals, and learn from the experts, says organiser, the European Snacks Association (ESA) – the trade association for the savoury snacks industry in Europe.

Recognised as the only trade show in Europe that is 100% dedicated to the savoury snacks and nuts sector, Snackex 2024 will take place next year on 19-20 June in Stockholm, Sweden at Stockholmsmässan. Snackex is a biennial B2B trade show, gathering everybody from snack makers and retailers to suppliers of raw materials, ingredients, flavours, processing equipment, packaging machinery and consulting services.

Snackex 2024 will also feature free-to-access workshop sessions on the show floor, where speakers will share their insights and expertise on the latest trends, challenges and opportunities in the savoury snacks market. Attendees learn about consumer trends, product innovation, sustainability, regulation, nutrition, and much more, helping them improve their skills and knowledge on snack production and customer choices.

The trade-fair covers 10,000m<sup>2</sup> of exhibition space and welcomes 200+ exhibiting companies, as well as around 3,500+ attendees from 98+ countries across Europe and the world. It spans two full days, preceded by a well-attended welcome reception where 500+



# SNACKEX



“Anyone who is someone in the savoury snacks and nuts industry will be at the event. At Snackex, you will find very specific customers who cannot be found anywhere else at general food shows”

snack professionals are expected to network in a fantastic setting, enjoying live entertainment and delicious food. “Anyone who is someone in the savoury snacks and nuts industry will be there at the event,” says Veronica Yakicioglu, head of events and membership at the European Snacks Association. “It is the very niche aspect of this trade show that has kept its audience faithful over the course of so many years and thanks to which more than 90% of the exhibitors and visitors are returning ones. At Snackex you will find very specific customers, who cannot be found anywhere else at general food shows.”

Snackex is designed to inspire, inform and connect attendees within the savoury snacks community, she adds. “It is an investment that pays off in terms of increased sales, brand awareness, customer loyalty and competitive advantage.”

Everyone wishing to attend the show is invited to keep a close eye on the Snackex website as pre-registration will be launched early in 2024, and get ready for the most comprehensive international trade fair for the savoury snack sector. See you all in Stockholm!



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Snacks  
Association

 Stockholmsmässan



## Forest Feast

# A wonderful world of snacks

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**Julia Summerson**  
Head of Impulse Sales

### KEY PRODUCTS

Chocolate Dipped Nuts  
Chocolate Dipped Fruits  
Slow Roasted Nuts & Trail Mixes  
Premium Dried Fruits  
Seasonal & Gifting

Forest Feast continues to outpace the snacking and confectionery category, delivering 52% growth YoY in the latest 52 weeks<sup>1</sup>, with its innovative range of snacks. “From the beginning, we have pushed the boundaries, continuously looking for ways to bring news to the category or elevate it with products that deliver on real craft, quality and taste,” says Bronagh Clarke, marketing director.

“Our aim is to drive value into the category by creating more snacking occasions and by credibly increasing basket spend with outstanding products. We are leaders in Chocolate Dipped Nuts, Fruit and Trail-Mixes, and have added 54% incremental basket spend in the trade over the past year<sup>2</sup>.”

### Award-winning innovation

The Forest Feast team handcraft everything in-house at the company’s chocolate & roasting facility in Co. Armagh. This enables them to create many category firsts, such as Peanut Butter & Milk Chocolate Dipped Dates and new Blonde Chocolate Caramelised Hazelnuts, which launch this Christmas. “Innovation is ingrained in everything we do, and we have an exciting pipeline of new launches over the next 24 months,” reveals Clarke.

This year the brand also picked up many Great Taste Awards, including new stars for its Truffle & Pecorino Roasted Nut Mix, Fairtrade Preda Mango and Nutmilk Vegan Chocolate Peanuts.

### HFSS-compliant treats

One of the brand’s biggest innovations this year has been the launch of a new HFSS-compliant range of Vegan Milk Chocolate snacks.

Clarke says: “We wanted to create chocolate snacks for anyone cutting out or cutting down on dairy, but a lot of the products in the market were closer to dark chocolate and very bitter. We couldn’t source a good enough vegan milk chocolate to use, so we developed our own, using almond milk in place of cow’s milk. We then drenched our deep-roasted peanuts, juicy raisins, and crunchy corn in it to create snacks that all chocolate-lovers can enjoy. The



“Our aim is to drive value into the category by creating more snacking occasions and by credibly increasing basket spend with outstanding products”

range is vegan, gluten-free and has 30% less sugar<sup>3</sup> than regular chocolate, and is fully HFSS-compliant.

### Snacking on-the-go

The brand also launched a range of its best-selling snacks in impulse format. These innovative nuts are all seasoned or chocolate-dipped in-house, in small batches using local and artisan ingredients. The range is gluten-free, with vegan and non-HFSS options.

Forest Feast continues to bring the brand to life across media, in-store and at exhibitions. A nationwide sampling campaign is planned in the year ahead, targeting over 250,000 consumers. It has also made progress on its sustainability goals by removing palm oil from the brand, reducing its use of plastic and paper, continuing to source sustainably and plant trees for every order placed, and working with organisations like FareShare to redistribute excess stock to those in need.

### Source

<sup>1</sup> Internal Company UK & Ireland Sales Data, Sept 2023  
<sup>2</sup> IRI, Value Sales, Sept 2023  
<sup>3</sup> 30% less sugar & 50% more cocoa compared with market standard chocolate



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## General Mills

## Spotlight on 'better for you'

## DETAILS

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Head of Snacks (Nature  
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## KEY BRANDS

**Nature Valley**  
**Fibre One**

Increasing consumer interest in nutrition and wellness has driven the growth of snacks at the healthier end of the spectrum – whether that's lower-calorie options or those that are boosted with functional benefits. In fact, research has shown that 40% of consumers state a clear preference for healthy snacks<sup>1</sup>.

One of the category's major players, General Mills, is driving the better-for-you charge with brands Nature Valley and Fibre One 90 Calorie, reveals JP Del Carmen, head of snacks for both brands. "The UK's No.1 cereal bar brand with 10.2% share of the total category value<sup>2</sup>, Nature Valley is a key growth driver, up +8.9%<sup>3</sup> with a current brand value of £64m<sup>4</sup>, while Fibre One 90 Calorie is a staple in the basket for many shoppers, with impressive sales value of £30m<sup>5</sup>," he says.

## Innovating to offer choice

In light of the HFSS regulations, many brands have adapted their portfolios to offer consumers that all-important choice, notes Del Carmen. "General Mills created a totally new proposition outside of its Nature Valley core range to offer the best-selling products shoppers know and love, as well as drive excitement with new options," he explains.

"Nature Valley Oaty & Crispy, an HFSS-compliant duo of tasty oat-based cereal bars, landed on shelves this spring and has proved hugely popular, driving incremental sales since launch. Tempting tastebuds with both Honey and Cocoa flavours, each bar in the Oaty and Crispy range is made with 100% wholegrain oats and contains 30% less sugar than an average breakfast or cereal bar. An extensive research and development process has also ensured a light, crisp texture, differentiating it from the crunchier core range."

Aimed at the busy morning occasion in particular, Nature Valley Oaty and Crispy are designed for the whole family to enjoy, and consumer testing has proved they do just that, achieving a 79% purchase intent with parents and kids<sup>6</sup>.



“Nature Valley Oaty & Crispy landed on shelves this spring and has proved hugely popular. Meanwhile, Fibre One 90 Calorie also expanded its range with new Crispy Choc Squares and a Banoffee flavour added to its permissible doughnuts”

“Fibre One 90 Calorie has also expanded its range with two non-HFSS new products,” adds Del Carmen. “New Crispy Choc Squares are compliant with the regulations while offering a super-tasty product experience, mixing in crispy pieces to the bake for a deliciously textured bite. The brand’s popular Cookies and Cream Drizzle Squares have also been reformulated to now contain 50% less sugar.”

## The best of both worlds

General Mills’ strong innovation pipeline also saw the addition of a Banoffee flavour to Fibre One 90 Calorie’s range of permissible doughnuts, says Del Carmen. “The UK’s top brand in better-for-you snacks and leader in the diet management sector<sup>7</sup>, took flavour cues from the classic and much-loved treat Banoffee Pie to create this dessert-inspired mini doughnut,” he says.

“The new SKU taps into consumer demand for ‘ultimate indulgence’ with additional benefits built in. Fibre One 90 Calorie Banoffee flavour not only offers great flavour and texture, but also a high fibre content. This makes it the perfect, all-round functional snack; tasty, convenient and an easy way to boost fibre intake.”

## Source

<sup>1</sup> Nielsen Consumer (2022)

<sup>2</sup> Nielsen ScanTrack Total Market, MAT data to Aug 2023

<sup>3</sup> Nielsen ScanTrack data, GB Total Coverage, 52 w/e Aug 2023

<sup>4</sup> Nielsen ScanTrack, GB Total Coverage incl. discounters, Total Cereal Bars & Healthier Biscuits, MAT to Aug 2023

<sup>5</sup> Nielsen ScanTrack, Bars, GB Total Coverage incl. discounters 52 w/e MAT to Aug 2023

<sup>6</sup> NielsenIQ, BASES, May 2022

<sup>7</sup> Nielsen ScanTrack Total Market, MAT data to w/e 29.04.23



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\*Source: Nielsen Scantrack: Total GB 08.23



graze

# Making healthy taste great

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KEY BRANDS

Crunch  
Oat Boosts  
Flapjacks

Since graze's inception in 2008, it has challenged the conventions of the snacking industry with its range of healthy snacks that really deliver on taste. Today, graze continues to pioneer the future of snacking by evolving almost the entirety of its range to be HFSS-compliant, reveals the company.

"We've reformulated over 95% of our retail range to be HFSS-compliant, while still ensuring our products retain the great taste they're known and loved for," says Joanna Allen, chief executive officer of the UK's No.1 healthy snacking brand<sup>1</sup>, graze.

It has been a year since the HFSS legislation came into play and graze is looking to the future by working with retailers on making healthy snacking delicious and exciting to shop for, reveals Allen. "HFSS put healthy snacking in the spotlight and with nearly one-quarter (24%) of consumers<sup>2</sup> believing that healthy food doesn't taste great<sup>3</sup> and 52% often tempted by unhealthy choices<sup>4</sup>, there was much work to be done," she says. "When it comes to taste, graze has realised the opportunity to help transform the perception that 'better-for-you' snacks don't taste as good."

Earlier this year, graze launched Sticky Toffee Oat Boosts to satisfy that sweet craving, which has been the best-performing NPD in years, with an average of 4.7 star online reviews and a total market value of £472,000<sup>5</sup>, she reveals. "Containing 45% less sugar than an average cereal bar and made from natural, wholegrain oats mixed with chopped dates and rich treacle, Sticky Toffee Oat Boosts (RRP £2.75 for 120g) is HFSS-compliant and has been formulated as an indulgent yet healthy snack that shoppers want to grab time and time again," notes Allen.



**"We've reformulated over 95% of our range to be HFSS-compliant, while still ensuring our products retain the great taste they are known and loved for"**

**The HFSS sales opportunity**

More and more people are trying to make healthier choices, and they expect brands and retailers to help them do so. "The HFSS legislation is an opportunity to grow the snacking category and improve shoppers' health," says Allen. "The key to unlocking this growth is by creating exciting displays of non-HFSS products that make healthy choices as visible to shoppers as possible."

Putting this ethos into practice, graze ran a 12-week trial of off-branded gondola ends with a grocery retailer – which was a huge success, she adds. "Seventy-eight per cent of shoppers picked up graze for the first time in 12 months<sup>6</sup>, so if healthy alternatives are visible, shoppers will choose them."

Secondary locations at tills were also vital as they generate high footfall and visibility at front of store. These retailers saw a sales uplift of 122% from the trial<sup>7</sup> across graze's on-the-go range, showing that little actions can have a big impact.

"With almost 1bn snacking occasions every week, research shows 97% of people are planning<sup>8</sup> to snack the same, or more, in future. This demonstrates the category's strength and, with continued investment and collaboration, together we can future-proof the growth of healthy snacking."



Source

<sup>1,2</sup> Millward Brown Brand Tracking, 2021  
<sup>3,4</sup> 2023 HB Health Survey  
<sup>5</sup> Tableau 22.04.23-26.08.23  
<sup>6</sup> Loyalty Card Data, April-September 2022 vs prior 52 weeks.  
<sup>7</sup> Retailer EPOS 2022  
<sup>8</sup> The Value Engineers, n5000, 2022



# Stock up on the UK's no.1 healthy snacking brand\*



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\*#1 in spontaneous awareness for healthy snacking brands. Source: Attest Brand Health Tracking, UK nationally representative sample, n=500 (November 2022).  
\*\*Kantar Worldpanel penetration data, 52 w/e 2 Oct 2022 vs. LY, Total Market, Total Graze Savoury Snacks. \*\*\*Over 6,000 supermarkets across the UK now accept plastic bags and wrapping, which shoppers can take this type of plastic to for recycling. †Based on our new recipe passing the Action Standard of significantly improved product or opinion. Nationally representative sample (n=150).

Grenade

# Booming protein bar sales

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**Rob Page**  
Head of Product

KEY BRANDS

Grenade

↙ Grenade’s phenomenal growth through 2023 has cemented its spot as the UK’s No.1 protein bar brand with £39.4m of sales YTD, an increase of 29% on last year and double the sales of the No.2 brand<sup>1</sup>. With the overall category up 21% YTD<sup>2</sup>, more and more consumers are choosing protein bars as their snacking option, and savvy retailers are creating more space for their healthier snacking ranges, helping to boost category growth.

At the beginning of 2023, Grenade introduced the ground-breaking Oreo protein bar, which set the category alight, says managing director Phil Greenhalgh. “It fast became the best-selling protein bar in the category amassing £4.3m of value sales in the last 12 weeks, over double that of the second best-selling SKU<sup>3</sup>, Grenade Chocolate Chip Salted Caramel,” he notes.

“With 94% of adults trying to eat more healthily<sup>4</sup>, and 75% happy to swap for a healthier option if it’s tasty<sup>5</sup>, it’s no surprise that the Oreo protein bar has become so popular so quickly,” he adds. “With 80% of Oreo protein bar customers being incremental<sup>6</sup>, the strength of the Oreo flavour has really brought new customers into eating protein bars as a healthier alternative to typical confectionery snacking – in fact, Grenade Oreo is now the third best-selling confectionery single in the UK<sup>7</sup>.”

**Oreo White launch**

Following this ground-breaking launch, Grenade is introducing Oreo White – a white chocolate enrobed flavour expected to follow in the success of its milk chocolate counterpart. Available as a 60g bar from late September, Grenade Oreo White is a triple-layered protein bar, made with real Oreo pieces and the flavours fans expect. “Combining the original Grenade Oreo and Oreo White protein bars within a fixture is a certain winner to capture fans of healthier snacking,” says Greenhalgh.

**Wider range success**

Apart from the outstanding success of the Oreo protein bar, Grenade’s wider range of best-selling flavours have benefited from continued category



“Combining the original Grenade Oreo and Oreo White protein bars within a fixture is a certain winner to capture fans of healthier snacking”



growth, he adds. “With the impact of HFSS on supermarket ranges, having great-tasting compliant bars ready for retailers to solve the solution of maintaining impulse space for healthier snacking has proved lucrative for both supermarkets and Grenade.”

Different pack formats enables Grenade to be a credible healthier snacking option for all occasions, he adds. “The 60g single is still the go-to solution for snackers, but the recent introduction of the 35g snack-size bar provides the perfect on-the-go treat. For those wanting to stock up for later, the 4x60g multipacks are growing ahead of the protein bars market, up 50% YOY<sup>8</sup>, so provide an opportunity for retailers to capture bigger basket purchases.

Source

<sup>1,3</sup> IRI Total Marketplace, Protein Bars, Value sales 52 w/e 06.08.23  
<sup>4,5</sup> Mintel – Attitudes Towards Healthy Eating – UK – 2023  
<sup>6</sup> Retailer Shopper Data ending 30.07.23  
<sup>7</sup> IRI Total Marketplace, Value sales & EROS 12 w/e 06.08.23  
<sup>8</sup> IRI Total Marketplace, Protein Bars, Value sales YoY % chg 12 w/e 09.07.23



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KIND Snacks

# Kindness at its core

DETAILS

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KEY BRANDS

KIND

 In a post-HFSS world, the growth trajectory of healthy snacking is stronger than ever. It's estimated that healthy snack bars are worth US\$17bn globally and are forecast to grow 6.9% in the next 5 years<sup>1</sup>. Kind is starting to see these positive trends, having grown double the rate of the category in the last year<sup>2</sup> by leading the charge with HFSS-compliant innovation and standing out with unique activations.

**Innovating for category growth**

After the success of the launch of Kind Maple Pecan Almond and Kind Fruit & Nut last year, it has become obvious that HFSS-compliant products don't have to sacrifice great taste. As a result, Kind added Caramelised Biscuit Nut and Chocolate Chip Cashew flavours to its HFSS-compliant range. "Our compliant bars can be used to signpost healthy snacking at front of stores, encouraging shoppers to make healthier decisions in the most impulsive moments of their shopping journey," says category manager Alice Jeavons. "Because of this, healthy snack bar penetration has grown twice the rate of last year<sup>3</sup>.

"In 2024, Kind will continue to innovate in this space, with the aim of keeping healthy snacking at the front of stores and shoppers' minds, but without sacrificing great taste and nutrition."

**Fuelling women's football**

As the newly announced healthy snacking partner of the England women's football team, the company set out to celebrate this partnership in a way that is uniquely Kind; fuelling the Lionesses for the Women's World Cup. Kicking off the partnership with a nationwide media campaign 'what



**“Our HFSS-compliant bars can be used to signpost healthy snacking at front of stores, encouraging shoppers to make healthier decisions in the most impulsive moment of their shopping journey”**

fuels you', the Lionesses shared what fuels them for the games. Following this, Kind set out on a mission: to deliver a message of support that fuelled the England team as they headed to Australia for the summer tournament and as they returned home. Kind compiled thousands of messages from fans, family, friends, and Lioness Legends to create one unmissable message, reading 'Lionesses, You're Our Pride'. After the tournament, Kind also wanted to recognise the England team, who achieved historic success, with another epic message reading, 'Lionesses, You Did Us Proud'. The moment landed 350+ pieces of coverage, including featuring on ITV, BBC, Talk Sport, and Sky Sports News.

**Celebrating the UK's kind heroes**

With kindness at the core of the brand, Kind believes kindness has the power to change the world. This year, the company will be inspiring kindness through sharing real stories from people's experiences of kindness on billboards throughout London. Kind will also be celebrating kindness by searching for the UK's kind hero for the second year running. This will be celebrated with a statue, a night's stay for the unveiling, and a year's supply of Kind bars. Last year, Jo Newby was crowned the UK's kind hero for fostering over 90 children and setting up three pan-disability football teams. We can't wait to see the nominations this year.



**Source**  
<sup>1</sup> Euromonitor Health & Wellness data Nov 2022. Snacking = Confectionery, Ice Cream & Desserts, Savoury Snacks, Sweet Biscuits, Snack Bars & Fruit Snacks.  
<sup>2</sup> Nielsen, Total Coverage, Value Sales, Snack Bars, L52 w/e 15.08.23  
<sup>3</sup> Kantar, Total Market, Take Home Cereal & Fruit Bars, L52W Penetration % Change

# KIND<sup>®</sup>'s newest HFSS compliant bar



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\*Nielsen, Value Sales, MAT to 15.08.23



KP Snacks

# Diverse range drives growth

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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

 KP Snacks has one of the broadest portfolios on the crisps, snacks and nuts (CSN) market, uniquely covering all segments, including popcorn. Consumed by over 20m households, its diverse portfolio delivers something for everyone, across all occasions and different formats, up and down the value spectrum, and is a key driver of category growth, says group sales director Andy Riddle.

**Premium & better for you snacks**

Tyrrells is the fastest-growing premium hand-cooked crisp brand (+14.5% YOY in value<sup>1</sup>), with latest flavours including Tyrrells Tomato & Chilli Chutney and Tyrrells Black Garlic & Sour Cream. “As a quality product, Tyrrells offers consumers a tasty, affordable treat, which makes sharing occasions feel more special,” explains Riddle.

Meanwhile, KP Snacks’ ‘better for you’ portfolio is also delivering strong growth, he adds. “KP Snacks now has over 100 non-HFSS products on the market and, with taste remaining the No 1. category growth driver<sup>2</sup>, the company continues to deliver delicious ‘better for you’ snacking products without ever compromising on great taste. We are committed to 55% of sales coming from non-HFSS, or 100 kcal or less per pack by 2030.”

popchips holds a 16% share of the healthier snacking segment<sup>3</sup>, and the entire range is non-HFSS, says Riddle. “popchips also has a new multipack format, up 44.8% YOY<sup>4</sup>, and the brand recently made its debut in popcorn.”

HFSS location restrictions, from which nuts are exempt, also offer a huge opportunity for KP Nuts, with



“At KP Snacks, we are continuing to expand our portfolio with the right products in the right formats to drive category growth”

its flavour and format innovation driving incremental consumer occasions, says Riddle. Meanwhile, KP Flavour Kravers bring bold flavours to the nuts segment, igniting interest from younger consumers, while KP Snack Packs deliver a convenient, on-the-go solution.

**Nostalgia brands, punchy flavours**

Among KP Snacks’ portfolio of classic heritage brands are two of the best-performing brands in the market, with Discos (+49.4% YOY<sup>5</sup>) and Nik Naks (+61.2% YOY<sup>5</sup>), he reveals. “Hula Hoops, another iconic brand, celebrates its 50th anniversary this year and is rising ahead of the category at +19%<sup>6</sup>.”

The business also introduced McCoy’s Epic Eats this year. Delivering on McCoy’s iconic bold flavours, the range was recently expanded with new multipack SKUs: McCoy’s Epic Eats Chip Shop Curry Sauce and McCoy’s Epic Eats Bangin’ BBQ. The new products are non-HFSS with 45% less salt than the McCoy’s core range.

“In good or bad times, everyone wants an affordable, tasty treat,” concludes Riddle. “At KP Snacks we are continuing to expand our portfolio with the right products in the right formats to drive category growth.”



Source  
<sup>1-6</sup> NielsenIQ, Total Coverage,  
Total Value, 12.08.23



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**✓ NON-HFSS**

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FLAVOURS**  
AVAILABLE IN A MULTIPACK

**MCCOY'S MULTIPACKS  
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+23.3% YOY\***

\*NielsenIQ, Total Coverage, Value, MAT Aug '23



# UK'S NO.1 JERKY BRAND



**JACK LINK'S**  
MEAT SNACKS

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Nielsen unit sales 12 months to August 2023

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## Jack Link's



## High-growth opportunity

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### KEY CONTACTS

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Jack Link's UK  
Country Director

### KEY BRANDS

**Jack Link's**  
– Beef Jerky Original  
Sweet & Hot, Teriyaki  
– Biltong  
– Ham Snack  
– Beef Bars

Jack Link's is the UK's No.1 jerky brand<sup>1</sup>, leading the jerky and biltong meat snacks category, which is worth £33m in retail sales value<sup>2</sup> across total grocery and convenience. This is big news, says UK country director David Harriman. "Jack Link's mission is to support category growth, which is up in both value (+10%) and units (+7%) YTD<sup>3</sup> and has more than doubled in value over the last five years<sup>4</sup>. There is room to double again as still fewer than one in 10 households buy it<sup>5</sup>," he notes.

"Retailers can profit from this high-growth opportunity by stocking Jack Link's best-sellers as shoppers search out high-protein snacks. Jack Link's Beef Jerky Original 25g has the highest unit rate of sale<sup>6</sup> of any product in the category. The Jerky comes in Original, Sweet & Hot and Teriyaki flavours."

Jack Link's drives growth by continuing to invest very heavily in media, sampling at fitness and gaming events and its partnership with globally leading, UK-based e-sports team Fnatic, adds Harriman. "So, we've increased sales value by over one-third in the last six months<sup>7</sup>."

"Making it easy for shoppers to find high-protein meat snacks is key. They are best merchandised on the savoury bagged snacks fixture. Secondary siting next to categories with a high cross shop, such as energy drinks, and at till point build visibility across store and prompt incremental purchases.

"Jack Link's is a high-protein, high-growth, high-profit opportunity."

### Source

- <sup>1</sup> Nielsen, Latest 12 wks value and unit sales data to August 2023
- <sup>2</sup> Nielsen, MAT value sales to August 2023
- <sup>3</sup> Nielsen, YTD value and unit growth to August 2023 vs YA
- <sup>4</sup> Nielsen, MAT value sales 2018-2023
- <sup>5</sup> Nielsen Homecan Penetration MAT to July 2023
- <sup>6</sup> Nielsen, Grocery Multiples, latest 12 w/e 09.09.23
- <sup>7</sup> Nielsen, YTD value sales to July 2023



Nurture Brands

# Nurturing diversity and innovation

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**Govinda Kular**  
UK Sales Director

KEY BRANDS

**Rebel Kitchen** – organic raw coconut water and cold pressed juices  
**Doisy & Dam** – plant-based and palm oil-free chocolate  
**EMILY** – better-for-you veg crisps  
**Jax** – crisp and refreshing coconut water drinks  
**Indie Bay** – low-calorie pretzels  
**The Primal Pantry** – plant-based protein snack bars

With a portfolio of seven plant-based food and drink brands, including Rebel Kitchen, Emily and Doisy & Dam, Nurture Brands – a British B-Corp certified food and drink business, founded in 2019 – always has innovation worth talking about. The company’s ‘house of brands’ approach and product diversity are integral to its success, says Adam Draper, managing director. “We are a one-stop shop for retailers, offering a wide range of innovative, more sustainable, plant-based choices for their consumers,” he explains.

One of the business’ snacking brands, Emily, is a ‘better for you’ alternative that promises consumers can “ditch dull, eat bold”. “We offer consumers healthier alternatives to traditional snacks, that don’t compromise on taste,” adds Draper. “One example of this is Emily Veg Thins – low-calorie, HFSS-compliant tortilla chip alternatives made with pea, corn, lentils and beans.



“We are a one-stop shop for innovative, more sustainable choices”

“Emily Seaweed Crisps is the innovation that excites us most right now; they’re made with superfood seaweed, but have a satisfying crunch, just like crisps.”

Emily Sea Salt Seaweed Crisps in 50g sharing format will launch into Waitrose in October and Nurture Brands plans to extend the sharing bag range with other classic potato crisp flavours such as Salt & Vinegar and Vegan Cheese.

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TO STOCK UP CONTACT: sales@nurturebrands.com

PART OF THE  
**NURTURE BRANDS**  
FAMILY



## Mitsuba Snacks

# Mitsuba: the new kid in town

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**Danielle Kranenburg**  
 Marketing Manager

### KEY BRANDS

**Mitsuba Thai Chilli crispies** – Great Taste Award winner 2023

While Asian-inspired snacks have already been an established and growing category in the Netherlands for years, with a value up to €40m<sup>1</sup>, German consumers are also now exploring the Asian snacks market (+12.3% MAT to June 2023<sup>2</sup>) since Mitsuba Snacks entered the category in 2019.

The unstoppable rise of the Asian kitchen in Western Europe and the need for health-conscious snacking are important drivers behind the growth of this category. Also, in the UK, there seems to be headroom for brands to enter the sector, according to Danielle Kranenburg, marketing manager at the company.

“What appears to be needed by UK shoppers are brands that are authentically Asian-inspired within this sector,” she explains. “Forty per cent of Asian-inspired snack shoppers will buy more than two brands within the sector<sup>3</sup>, demonstrating that there is an appetite to try new products and flavours.”

### Safe flavour adventure

Mitsuba offers a range of snacks that will inspire the consumers and retailers alike, driving true incremental sales to the category, says Kranenburg.

“The Mitsuba snack portfolio is all about discovering Asian authentic flavours. With a wide range of Asian snack options offered by the company – from Street Food Snack Mixes to



“By the end of 2024, everyone will know that Mitsuba Snacks is here to stay”

Japanese Peanut Crunch & Crispies and the Great Taste Award-winning Thai Chilli Crispies – the shopper can go on a ‘safe flavour adventure’ to explore the taste explosions that the authentically Asian kitchen has to offer,” she says.

“All of our products are free from palm oil or any taste enhancers and are 100% vegetarian.”

### Bringing the taste to consumers

From November this year Mitsuba will start a roadshow across different types of food shows and fairs, such as the BBC Good Food Show. At these events, consumers can gain their first introduction to the Mitsuba brand and its portfolio and really taste the products.

Furthermore, brand-building will commence at the beginning of next year, with full social media support, influencer marketing, sampling and in-store support.

“By the end of 2024, everyone will know that Mitsuba Snacks is here to stay,” says Kranenburg. “Mitsuba... spice up your life.”



### Source

<sup>1</sup> Nielsen, MAT 2023  
<sup>2</sup> GfK, MAT 2023  
<sup>3</sup> TRKR insight, 1,000 UK bagged snack shoppers, September 2023



# NEW SNACK ALERT: MITSUBA THAI CHILLI CRISPIES

**PROUD WINNER OF  
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Mitsuba snacks are new in town.

Premium Asian snacks full of spice and crunch and celebrated by the Guild of Fine Foods for its GREAT TASTE! For more information about the entire range or requests for samples you can visit [www.mitsubasnacks.com/samplerrequest](http://www.mitsubasnacks.com/samplerrequest)

**MITSUBA, SPICE UP YOUR LIFE.**





## Mondelēz International

# Snacking made right

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Manager

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Cadbury  
Cadbury Dairy Milk  
Green & Black's  
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, explains Susan Nash, trade communications manager at the company. "We call this Snacking Made Right. Within this, we've identified key five focus areas that are shaping the future of snacking."

● **Value:** Value for money is even more crucial this year as shoppers look for affordable, familiar treats during these challenging times, says Nash. "Large pack formats offer reassurance to shoppers, with heritage brands such as Cadbury well-positioned for this." This Christmas, Cadbury's Mini Snowballs range will be joined by a 296g bag format that shoppers can share, which is set to help drive incremental sales for retailers this festive season.

● **Wellbeing:** "With consumers paying more attention to their physical and emotional wellbeing, we're committed to Mindful Snacking, an approach that places emphasis on intention and attention," she says. "We have a range of non-HFSS innovations, including non-HFSS belVita Soft Bakes in Blueberry and Golden Oats, as well as Cadbury Dairy Milk Fruitier & Nuttier Trail Mix, a delicious mix of fruits, nuts and Cadbury chocolate, to provide shoppers with choice. We have also launched Cadbury Delights, at just 91 calories per bar, catering to consumers looking for lower calorie options."

● **Occasions:** Consumers are enjoying evenings at home as a cost-effective way to spend time together<sup>1</sup>, meaning home consumption occasions will continue to be important throughout



“Our mission is to deliver the right snack for the right moment, made in the right way. Within this we've identified five focus areas that are shaping the future of snacking”

2023 and beyond, explains Nash. "Confectionery and snacking are key to the Big Night In occasion, so retailers should include the latest sharing innovations, such as our new 400g format for our Cadbury Chunk Collection, which has an exciting twist: for the first time, the product – comprising a variety of Cadbury Chunks – will now include Caramilk too.

● **Connections:** Connections bring people together, and food is an integral part of socialising, with 7 in 10 consumers believing sharing snacks with others is their love language<sup>2</sup>, she adds. "Moments that bring consumers together such as sports events and seasonal occasions are all potential opportunities for driving sales," she notes.

● **Sustainability:** "Through initiatives such as Pack Light and Pack Right, Cocoa Life and The Harmony Charter, we've made strong progress towards our sustainability goals. Additionally, this festive season, we are pleased to share that our core Cadbury selection boxes will now include trays made with ~80% rPET – post consumer recycled plastic PET<sup>3</sup>, enabling us to remove ~400 metric tonnes of virgin plastic as part of our 2025 sustainable packaging goals and progress towards UK Plastic Pact targets<sup>4</sup>."



### Source

<sup>1</sup> IGD Research, UK channel forecasts 2020-28 and Eating Out forecasts 2020-28  
<sup>2</sup> MDLZ 2022 State of Snacking  
<sup>3</sup> <https://www.recyclenow.com/>  
<sup>4</sup> <https://www.mondelezinternational.com/Snacking-Made-Right/Packaging-Innovation/>



# Help grow your snack sales

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**Mondelēz  
International**

SNACKING MADE RIGHT



Nestlé UK & Ireland

# Nutritious snacks for infants

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 Infant Food Lead

KEY BRANDS

**LITTLE STEPS®**

- **Organic Banana & Raspberry Star-puffs** – suitable from 8 months+
- **Organic Carrot & Orange Chip-puffs** – suitable from 10 months+
- **Organic Peanut Pop-puffs** – suitable from 12 months+

+ NB: The Department of Health recommends solid foods be introduced at around 6 months of age. Older infants and toddlers may need up to 2 healthy snacks between meals each day. Be mindful not to overfeed your child.

↙ The baby and toddler snacks category is the second-biggest category in baby food, worth £118m<sup>1</sup> in the latest 52 weeks, reveals Vanessa Lessing, infant food lead at Nestlé Nutrition.

“It is an impulse-driven category and has remained in value growth, as parents and caregivers are looking for age-appropriate and developmentally adapted snacks in new and exciting flavours to keep their babies and toddlers engaged, as well as give exposure to as many new flavours as possible,” she says.

Snacking is an important part of the weaning journey; while fresh snacks such as fruit and vegetables are preferable during the weaning period, some babies and toddlers refuse to eat such foods and therefore these type of child-specific snacks can be a useful alternative to complement the weaning diet and help to support autonomous feeding, she explains.

“Snacking in between meals can be a useful way to add extra nutrition to your child’s diet, as well as giving them an opportunity to handle, explore, and build a healthy relationship with their food.

“Healthy snacking is key for the baby and toddler snacks category as parents and caregivers are looking for nutritious, no added salt or sugar options,” she adds. “Convenience is another purchase driver, with single-serve/on-the-go solutions key to supporting parents and caregivers with snacks for those in between meal-times.

“Looking forward, we anticipate the baby and toddler snacks category will



“Healthy snacking is key for the baby and toddler snacks category as parents and caregivers are looking for nutritious, no added salt or sugar options”

continue to grow from strength to strength.”

**Little Steps to happiness**

The Little Steps snacks range launched in 2021 and comprised five SKUs across Popcorn puffs and Crackers. “We relaunched our puffs range in May 2023, into a new single-serve pack format and introduced some new shapes and flavours to the market,” reveals Lessing. “These changes have resulted in Little Steps food becoming the second-fastest growing baby and toddler snack brand<sup>2</sup> in the latest quarter.”

Little Steps puffs range are organic baby-specific extruded snacks, made with organic cereals, vegetables and fruits. They have no added salt or sugar<sup>3</sup> and are baked not fried, with at least 19 trips to mouth per serving.

“The texture, shape and size has been developed and assessed by safety experts to support the development of fine and oral motor skills such as grasping, chewing ability and bite force for infants from eight months+,” notes Lessing. “These changes are designed to recruit new shoppers and drive increased sales by offering a wider choice to consumers and lowering the entry point in the highly competitive baby and toddler snack market.”



Source

<sup>1</sup> Circana, IRI All Outlets inc Chemists, Value Sales 52 w/e 12.08.23  
<sup>2</sup> Circana, IRI All Outlets inc Chemists, Unit Sales 12 w/e 12.08.23  
<sup>3</sup> Contains naturally occurring sugars





# LITTLE STEPS® puffs



LITTLE STEPS® food is the 2nd fastest growing baby and toddler snack brand\*  
**Stock up now**

IMPORTANT NOTICE: The Department of Health recommends solid foods should be introduced at around 6 months. Older infants and toddlers may need up to 2 healthy snacks between meals each day. Be mindful not to overfeed your baby. \*Circana, IRI All Outlets inc Chemists, Unit Sales, 12 w/e 12 Aug, 23. \*\*Contains naturally occurring sugars. \*\*\*As required by legislation.



PepsiCo UK

# Gen Z drives snacking habits

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KEY BRANDS

- Walkers
- Walkers MAX
- Walkers Sensations
- Walkers Baked
- Wotsits
- Doritos
- Sunbites
- Pipers
- PopWorks
- Snack A Jacks
- Kurkure
- Off The Eaten Path

Keeping abreast of the snacking needs of Gen Z is vital if snacking brands want to maintain share of the market, according to Fiona Tomlin, chief marketing officer at PepsiCo. “Gen Z shoppers are driving some of the main trends we’re seeing in snacking at the moment, such as the rise of the Big Night In occasion, and it’s important for big brands such as ours to ensure our portfolio is fit for purpose,” she says.

### Sharing snacks

“We know that Gen Z over-index during the ‘uplifting moments with friends’ occasion<sup>1</sup>, so a mix of flavour combinations and new formats is pivotal to keep these consumers engaged,” notes Tomlin. “Our research has suggested that 71% prefer staying in compared to a night out<sup>2</sup>, and sharing bags are particularly important to Gen Z consumers. Offering larger formats, such as our 85g sharing bags of PopWorks popped corn crisps, will appeal to shoppers looking to buy for moments with friends and family, as well as those looking for more choice.

“Tapping into our core Gen Z audience’s desire for new and exciting snacks that they can enjoy at home, we recently partnered with Burger King®, home of the Whopper®, to launch Flame-Grilled-Whopper® flavour Doritos. With the SKU also non-HFSS, it’s another great example of how consumers no longer have to compromise on great flavour to enjoy a range of snacking options.”

### Big flavours

Another overarching Gen Z attribute is a love for intense tastes in their snacks<sup>3</sup>, adds Tomlin. “To tap into this, Walkers Max teamed up with Pizza Hut to launch two new products: Walkers Max Pepperoni Feast and Walkers Max Texan BBQ, both of which are non-HFSS and deliver a unique taste profile.

“The new additions to our Walkers Max range are tailored towards Gen Z consumers looking for more intense flavours from their snacks<sup>4</sup>. By offering shoppers the indulgent taste of these famous toppings on the well-loved ridged crunch of Walkers Max, we hope



“A mix of flavour combinations and new formats is pivotal to keeping Gen Z engaged”



to create excitement for the category and a point of difference for the brand. Alongside the NPD, we’ve backed the campaign with an on-pack promotion, running now until 31 December 2023. Consumers can get a slice of the action with a two-for-one offer on Pizza Hut pizzas across the new range, highlighting Walkers Max’s focus on winning with Gen Z.

“As part of our commitment to offering consumers more choice, we renovated PopWorks’ Sweet BBQ flavour to make the entire range non-HFSS,” she adds. “A rebrand also took place, with creative inspired by the bold movement of Pop Art, to attract more Gen Z shoppers to the brand. PopWorks recently launched a new Salted Toffee flavour, helping retailers to cater to the nation’s love for sweet and savoury tastes in one.”

Source

<sup>1</sup> Bolt Tracking MAT Q3’22 (Q4’21 – Q3’22) data  
<sup>2</sup> Imagen Insights x PepsiCo Night In-In 2022  
<sup>3</sup> Gen Z vs. Millennials Youth Snacking Trends Report by Knit, 01.23 2. Kanitar % of total demog £ spend, 52 w/e 22.01.23



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pladis UK&I

# The evolution of snacking

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 McVitie's  
 Carr's  
 Go Ahead

 In a nation of snackers, there have been 21.2 billion snacking occasions this past year<sup>1</sup> and the category has evolved in line with the current economic landscape.

“We cannot ignore the impact of rising living costs and HFSS food regulations, which is changing the way people are shopping, snacking and rediscovering the great value presented by some core categories,” explains Aslı Özen Turhan, chief marketing officer at pladis UK&I. “Take sweet biscuits. In a cost-of-living crisis, consumers are tightening their belts and diverting spend away from dearer snacking categories, meaning sweet biscuits occasions have grown by +454m<sup>2</sup> – nearly half of the total growth in macro snacking occasions since 2019.

“Savoury biscuits also present retailers with a significant opportunity. These products offer both affordability and health benefits, while putting extra sitings in-store has been shown to create sales increases of up to 81.8%<sup>3</sup>.”

**The role of established brands**

“Shoppers are increasingly turning to brands they know and trust and, as one of the snacking market leaders, pladis’ range of popular brands, including McVitie’s, Jacob’s and Go Ahead, should be at the top of every retailer’s shopping list,” says Turhan. “We’ve invested heavily in our portfolio to engage shoppers and, as a result, we’re driving the highest level of incremental growth in the category<sup>4</sup>.

“In sweet biscuits, we’re doing this more than anyone else – and almost twice as much as our nearest competitor,” she says. “And the same is true in savoury biscuits, while in crisps & snacks, our share of incremental sales is almost double our share of sales – all thanks to Jacob’s Mini Cheddars<sup>5</sup>.”

**Innovation and engaging marketing**

“Not content to rest on our laurels and rely on our legacy, we’ve also worked hard to alleviate the threat of shoppers trading down, with engaging marketing campaigns and trend-led NPD,” adds Turhan.

“For McVitie’s, we’ve reminded



**“We’ve invested heavily in our portfolio to engage shoppers, and are driving the highest level of incremental growth in the category<sup>5</sup>”**



shoppers of our 180-year+ history, through our ‘True Originals’ campaign. This first kicked off earlier this year, when we recruited TV personality Martine McCutcheon to help us ‘Bring Back The Biscuit Break’. We didn’t just drive awareness for McVitie’s – we got more people eating biscuits across the total category<sup>6</sup>. We’ll be going live with the next leg shortly, with an above-the-line campaign, including a return to TV with a brand new creative.

“We’ve also expanded some of our all-time McVitie’s favourites with trend-led NPD. This includes the highly anticipated launch of McVitie’s White Chocolate Digestives, McVitie’s Digestives Milk Chocolate Minis, plus McVitie’s Jaffa Cakes Raspberry.

“Finally, prioritising healthier and non-HFSS launches has been a huge focus,” she reveals. “Reformulating Go Ahead best-sellers has propelled the brand’s growth by +33%<sup>7</sup>, while Go Ahead Wholistic, lighter versions of popular McVitie’s biscuits, Jacob’s Mini Cheddars 30% Less Fat, and Jacob’s Crinklys non-HFSS also align with this health-conscious direction.”

Source

<sup>1</sup> Kantar Usage, L52 w/e 09.06.23  
<sup>2</sup> Kantar Usage, L52 w/e 16.04.23 vs FY 2019  
<sup>3</sup> Nielsen Latest 12 w/e 12.08.23 (Comparison Off Shelf v Fixture Sales unit growth Grocery Mults)  
<sup>4,5</sup> Nielsen Grocery Mults Latest 52 w/e 12.08.23  
<sup>6</sup> Kantar WPO 12 w/e 09.07.23: McV +2.1m trips, Total Sweet Biscuits excl Healthier +1.3m trips  
<sup>7</sup> Nielsen EPOS data, Grocery Mults, 52 & 12 w/e 22.07.23



pladis

Feast on snacking success...

Core McVitie's biscuits worth

€201M<sup>1</sup>



New

Look out for McVitie's return to TV screens nationwide

Total Jacob's portfolio worth

€112.8M<sup>2</sup>



...with these three favourites

pladis is driving the biggest category growth<sup>4</sup>



New

Go Ahead soaring by

+33%<sup>3</sup>

1. Nielsen MAT up to 22.07.23

2. Nielsen Total Coverage data to WE 09.09.23

3. Nielsen EPOS data, 52 & 12 WE 22.07.23 \*Market: Grocery Multiples

4. Nielsen Grocery Mults Latest 52 we to 12.08.23



Symington's

# Extending its hot snacks offer

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**KEY CONTACTS**

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Head of Marketing  
& Category

**KEY BRANDS**

**Naked**  
**Mug Shot**

↙ The instant hot snacks category is worth £393m annually and is experiencing strong value growth, rising by 17.1%<sup>1</sup>, reports Symington's head of category and marketing Helen Scott. Although inflation, at a total category level is high (+22%<sup>2</sup>), which has made for a challenging environment for brands to grow, consumers are not prepared to give up purchasing hot snack products altogether and still want to fulfil their need for an indulgent snack or treat.

"Symington's Naked brand has met this need state with the launch of a new premium brand platform, Naked Ultimate, which has driven incremental sales for the category, appealing to consumers looking for more premium products," she says. "Naked has a unique, modern proposition, specialising in Asian flavours made with quality ingredients, naturally, as they are free of MSG and artificial additives. They're adventure without the risk, and convenience without compromise on taste or flavour."

**Spicing up Naked noodles**

In August, Naked launched its newest and spiciest innovation yet, Spicy Thai Style Sriracha noodles. Crafted with a blend of quality, natural ingredients and infused with authentic Thai flavours, the Spicy Thai Style Sriracha noodles are the first of their range to include a spicy sauce sachet. "Set to become a hot favourite among spice enthusiasts and noodle lovers alike, each mouthful promises an explosion of heat that only true spice enthusiasts can handle," says Scott. "Ready in only four minutes, they're perfect for lunch or an afternoon snack."

In September, Naked announced the re-launch of the core range to reinforce quality and taste, she adds. "The new product reformulation brings punchier flavours and thicker egg noodles, providing the consumer with more bite and depth of flavour."

Alongside the product redevelopment in September, Naked kicked off a 360-degree 'Sorry Not Sorry' campaign and marketing initiative across VOD, social media and PR, including



“Naked has a unique modern proposition, specialising in Asian flavours made with quality ingredients, naturally”



sampling and paid influencer to accelerate brand awareness. The 'Sorry Not Sorry' campaign is an apology to all other noodle brands, for creating new noodles with bigger and better flavours.

**Adding Christmas cheer in a mug**

Meanwhile, Mug Shot delivers big comforting carbs in favourite flavours, allowing consumers to make better choices easier, notes Scott. "Our consumers are looking for quick and easy food where the worry is removed for their weekday lunch. Our distinctive sachet format, available in 11 flavours, allows them to enjoy a tasty, ready-in-5 Mug Shot – perfect for lunch during a busy working week."

Ahead of the festive season, Mug Shot is adding a dash of Christmas cheer to mealtimes with the launch of its limited-edition flavour, Pigs in Blankets, adds Scott. "This features the irresistible taste of succulent pork sausages wrapped in crispy bacon, all combined in a tasty, comforting pasta."

Source  
<sup>1,2</sup> Nielsen, Scan data, 52 w/e  
26.08.23



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Tayto Group

# Getting snacking sorted

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 Marketing Director

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' with Golden Wonder's range of fully-flavoured snacks, Real Hand Cooked crisps, as well as being Britain's leading supplier of pork snacks<sup>1</sup>, says the company. This unique range provides retailers with a snacking 'one-stop shop', it notes.

**Profit from pork**

The ultimate pub snack, pork scratchings are actually twice as likely to be eaten at home than in the pub<sup>2</sup>. Squeezed pockets mean consumers are swapping a night out for a night in, a shift that has helped pork snacks to grow unit sales faster than the market<sup>3</sup>. Tayto has almost a 70% market share and the leading, Great Taste award-winning brands – Mr Porky (No.1 brand) and Midland Snacks (No.2 brand)<sup>4</sup> – make the company the pork snacking expert, well placed to advise retailers with some top tips, says Matt Smith, marketing director.

"Scratchings consumers are very loyal, with over 20% unwilling to switch to another snack<sup>5</sup>, so retailers are missing out by not stocking them," he explains. "With consumption peaking at weekends, scratchings are the perfect partner to a drink. Three-quarters are bought on impulse and are much more likely than other snacks to be consumed on the day of purchase, so displaying scratchings prominently – ideally with BWS or other snacks – will drive incremental sales. All our best-selling pork snacks are available in SRP and clipstrips, so there is an easy solution for every store – no matter the size.

"We continue to drive the pork snacks market by investing in digital campaigns with our latest ads going live in October – reaching over 5m



“Scratchings consumers are very loyal, with over 20% unwilling to switch to another snack, so retailers are missing out by not stocking them”

consumers. This is all part of our mission to remind people that there really is 'No Matching a Scratching'.”

**The power of £1**

Value for money is now the third most important reason for snacks purchase (after flavour and quality), with over 90% agreeing<sup>6</sup>, says Smith. However, convenience shoppers worry they will pay more for shopping locally. PMPs give shoppers confidence that they are not being ripped off – which is why PMPs have increased to 75% of snacks sales in symbols & independents<sup>7</sup>.

"£1 has been the main driver of category growth – rising more than twice as fast as the market<sup>8</sup>," notes Smith. "Inflation pressure is forcing other brands to put prices up, but Golden Wonder is committed to putting consumers and retailers first, recognising how important the £1 price-point is to both groups," he adds. "Consumers are feeling the pinch, so instead of raising the headline price, Golden Wonder is staying at £1, demonstrating its commitment to delivering great consumer value and strong retailer margins.

"With 64% of consumers willing to switch brands for a lower price<sup>9</sup>, the chance to profit from Golden Wonder's £1 PMP has never been greater."

Source

<sup>1</sup> Circana Market Advantage, IRI All Outlets GB, Pork Snacks, Value, 52 w/e 06.05.23  
<sup>2</sup> Norstat, May 2022  
<sup>3</sup> Circana Market Advantage, IRI All Outlets GB, Pork Snacks and Crisps, Snacks & Popcorn, Units, Pork Snacks +7.4% vs CSP +0.1%, 13 w/e 06.05.23  
<sup>4</sup> See 1  
<sup>5</sup> Norstat, Aug 22  
<sup>6</sup> Norstat, Jun 23  
<sup>7</sup> Circana Market Advantage, Symbols & Independents GB, PMP and Non-PMP Snacks, Value to 12 w/e 21.01.23  
<sup>8</sup> Circana Market Advantage, Symbols & Independents GB, Total Crisps & Snacks, Value, 52 w/e 01.10.22 vs 4 Years Ago  
<sup>9</sup> Norstat, Jan 23





# THERE'S NO MATCHING A SCRATCHING

**No.1<sup>1</sup>**  
BRAND



**No.2<sup>1</sup>**  
BRAND

**42% of retailers who sell Crisps & Snacks don't sell Pork Snacks - missing out on sales of over £7m pa.<sup>2</sup>**

- ✓ Over half of savoury snacks shoppers also buy Pork Snacks<sup>3</sup>
- ✓ Over 1 in 5 won't buy another snack if scratchings aren't stocked<sup>3</sup>
- ✓ Over 80% of scratchings are eaten with a drink - so hang clipstrips with BWS for extra impulse sales!<sup>4</sup>

**BIG taste, BIGGER bite and EVEN BIGGER PROFITS!**



SNACKING SORTED

**STOCK UP NOW FOR HIGH POR VAT-FREE SALES!**

Sources: 1. Circana Market Advantage | All Outlets GB | Pork Snacks | Value | 52 w/e 06-May-23. 2. Circana Market Advantage | Symbols & Independents GB | Crisps, Snacks & Popcorn and Pork Snacks | Value | 12 w/e 06-May-23. 3. Norstat Feb 23. 4. Norstat | Jan 20.

## Trigon Snacks Trading

# Big D fills the snacking gap

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 Chief Executive

### KEY BRANDS

**Big D**  
 Bar Bites

Big D has over 50 years of heritage and a unique personality, so it stands out easily from a category that is currently extremely bland, says Trigon Snacks Trading chairman Luke Pagarani.

“Data suggests that savvy consumers are looking for ways to reduce their basket spend,” he notes. “But for indulgent categories like snacking nuts, the own-label offering is never going to feel like a real treat.

“There is a huge pricing gap between the brand leader and private-label, which means too much sales value is lost when consumers trade down – and this is where Big D plays an important role. Our products sit comfortably between the two and offer retailers a ‘good, better, best’ tiering solution to their ‘leaky bucket,’” he says.

Trigon Snacks has spent nearly two years on a brand reinvigoration project, researching and benchmarking its products, he explains. “We recently gave our packaging a big facelift, with retro sci-fi imagery to appeal to a wider audience, while giving a nod to Big D’s long and colourful history. Our image is quirky but our flavours are never niche. We know where we belong – slap bang in the middle of the mainstream, keeping the classics fresh.”

In the cost-of-living crisis it’s back-to-basics for snacking but with innovation on packaging formats, he adds. “Our new doy packs stand out on-shelf all year round. Our cans for Xmas make sharing feel more special, adding a touch of cross-generational ritual. Limited editions, such as our indulgent Maple Seasoned Nuts with Fruit and Fudge, are well-placed to add incremental seasonal sales. Alongside this, we are working



“There is a huge pricing gap between the brand leader and private-label, which means too much sales value is lost when consumers trade down – and this is where Big D plays an important role”

to make the brand more sustainable – we already have a fully recyclable film solution and are investigating paper packaging innovation.”

Roasted nuts have steadily gained appreciation as a healthy snacking option, says Pagarani. “Formerly seen primarily as an accompaniment to a beer, they are increasingly viewed as a source of plant-based protein and fibre,” he says. “Now, with the crusade against ‘ultra-processed foods (UPFs)’, we are seeing a massive shift in what is considered healthy eating. Unlike most of the snacking aisle, roasted salted snacks are not considered UPFs.”

Across the category, salt reduction projects have hit a brick wall called ‘taste’, he adds. “Arbitrary salt reduction targets may be an answer to the riddle of ‘when is a treat not a treat?’ But they are not the way to go for healthy diets,” he says. “Better to go with a simple natural product that packs a flavourful punch, so the consumer is satiated. Consumers are not going to look kindly on more over-priced, ‘low-calorie’ snacks that leave them feeling hungry. Fortunately, the era of over-engineered snacking gimmicks is coming to an end. The makers of mysterious extruded puffs and chips with a hundred ingredients just haven’t realised it yet.”





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## Valeo Snackfoods

# Delivering taste and texture

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Head of Brands

### KEY BRANDS

**KETTLE® Chips**  
**MANOMASA® Tortilla Chips**  
**Metcalfe's® Popcorn**

“Here at Valeo Snackfoods it has been an exciting year of new product launches and brand partnerships, with lots more in the pipeline,” reveals marketing director Russell Tanner.

“To further support Kettle – the UK’s No.1 hand cooked crisp brand<sup>1</sup> – we’ve introduced three HFSS-compliant SKUs to our range,” he reveals. “Our top-selling Lightly Salted<sup>2</sup>, which has the highest rate of sale across all branded hand-cooked crisp products in sharing packs for the total market in the latest 12 weeks<sup>3</sup>, along with classic Sea Salt & Crushed Black Peppercorns, are now both fully HFSS-compliant across all pack formats – sharing, single-serve, multi-pack and PMP – meaning the products may be displayed anywhere in-store to encourage impulse purchase. We’ve ensured there is no consumer compromise when reformulating these products to meet HFSS requirements and hold ourselves true to our ‘absolutely nothing artificial’ statement.

“In addition, Ridge Cut Asian Chilli Beef is joining the Kettle sharing range this October. Like all our seasonings, the recipe was developed by our Kettle Chef, using the best authentic and real food ingredients, including real beef. The delicious new ridge chips combine seared, succulent beef, rich in Asian inspired spices, with notes of ginger, chilli & star anise, all wrapped up in a tongue-tingling sweet chilli sauce, perfect for nights in this winter with friends and family.”

The company’s other rising star, Manomasa, offers a range of premium tortilla chips in both sharing and single-serve formats, adds Tanner. The brand is now worth over £8m at RSV<sup>4</sup>, with strong growth of 18% over the latest 12



“We’ve ensured there is no consumer compromise when reformulating products to meet HFSS requirements, and hold ourselves true to our ‘absolutely nothing artificial’ statement”

weeks<sup>5</sup>, ahead of the tortilla category, indicating high demand for these innovative and adventurously flavoured chips, he reveals. “Manomasa produces authentic tortilla chips packed with flavour, using ingredients from South America, such as Yucatan Honey, to bring the excitement of Latin America to the snacking aisle.

“Delivering great taste and texture with our Latin-inspired flavours and shapes has always been critical to success, so we’ve worked hard to ensure our HFSS-compliant SKUs, which now form the majority of the range, provide the great snacking experience our customers expect.

“Our seasonal edition of Pineapple & Habanero Chilli performed so well this summer, it will be rejoining the range again from January. Bursting with flavour and naturally gluten-free, the sweet, fruity pineapple combines with a habanero chilli kick to bring a taste of summer to the table all year round.”

Valeo Snackfoods offers a wide range of POS to allow its brands to stand out and be merchandised with complementary products. For example, bundles with drinks brands, such as Manomasa with Corona, help consumers tap into snacking occasions at key moments during the year and drive the impulse shopper mission.

### Source

- 1 Circana Marketplace, Total Hand Cooked Crisps (client-defined) Branded Category, Value Sales, 52 w/e 06.08.23, Circana Total Outlets UK
- 2 Circana Marketplace, Total KETTLE® Chips Products, Value Sales, 52 w/e 06.08.23, Circana Total Outlets UK
- 3 Circana Marketplace Total Hand Cooked Crisps (client-defined), Big Bag (≥60g) Branded Products (≥10% Weighted Distribution), Rate of Sale (Value/Weighted Store Count/Week), 12 w/e 06.08.23, Circana Total Outlets UK
- 4 Circana Marketplace Total MANOMASA® Tortilla Brand, Value Sales, 52 w/e to 06.08.23, Circana Total Outlets UK
- 5 Circana Marketplace Total Tortillas Big Bag (≥60g) Category/Total MANOMASA® Tortilla Big Bag (≥60g) Products, Value Sales, 12 w/e 06.08.23 vs Prior Period, Total Outlets UK





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CATEGORY WITH  
GROWTH OF +18%<sup>2</sup>

Source: 1: Circana Marketplace Total Hand Cooked Crisps (client-defined) Branded Category, Value Sales, 52 Weeks to 6th August 2023, Circana Total Outlets UK. 2: Circana Marketplace Total Tortillas Big Bag (≥60g) Category / Total Manomasa Tortilla Big Bag (≥60g) Products, Value Sales, 12 Weeks to 6th August 2023 vs Prior Period, Total Outlets UK.



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