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The Grocer Guide to...

The
Grocer

Snacking



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Analysis

Four little letters – HFSS – have become a major talking point among snacking suppliers as the UK government plans its 2022 legislation move

Unsurprisingly, with Covid-19 lockdowns a recent memory and the government's high-fat, salt and sugar (HFSS) legislation sitting around the corner, much of the focus in the snacking category this year has been on health and wellbeing.

Consumers are focusing on low sugar, natural ingredients and functional or nutritional benefits as never before, as they take an increasingly holistic view of their wellbeing following the pandemic. This is colouring the way in which they approach the snacking category where the competitive climate is ramping up.

Meanwhile, the balance between snacking at home and on-the-go is creating a shift back towards the single-

serve market, as impulse buys ramp up once more. That said, the multipack business remains strong as consumers retain a hybrid working system of both home and office.

Snacking suppliers, meanwhile, are responding to this ebb and flow in the market, with innovative NPD and shifts in packaging styles to suit the differing consumption occasions.

"Snacking hasn't changed, but what consumers snack on has," says Steve Rich, managing director at Fulfil. "People are more demanding of their snacks, with 80% of consumers now snacking with purpose¹. We are increasingly seeing 'mindless munching' being replaced with snacks that deliver a

beneficial purpose as people make more informed snacking choices. The impact of the Covid-19 pandemic has accelerated the demand for brands that support a healthier lifestyle."

Shoppers are looking for added benefits in their snacking, says Graze chief brand officer Pia Villa. "Forty-four per cent of adults see snacks as a good way to boost their nutritional intake, while 53% of consumers are actively trying to eat snacks that are more healthy²," she says. That said, over half of consumers are tempted by unhealthy choices and identify this as a key barrier to being healthy², she adds.

"Snacks which boost nutrition through added fibre or protein, those

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fortified with vitamins or those that help consumers get their five-a-day or reach certain lifestyle goals will be key drivers for the sector, as shoppers become more health-conscious,” notes Roisin Witart, marketing manager at General Mills. “This trend has been fuelled by the coronavirus pandemic, with 80% of consumers saying they will make greater attempts to stay healthier because of Covid-19³.”

“Consumers will also be relying on weight management solutions after more than a year of restricted movement and increased indulgence due to the various lockdowns, with the weight management category now valued at £120.7m⁴,” Witart adds.

Stuart Ball, head of category at Kind, notes that the big drivers within the snack bar category have been products with a clear calorie call-out, as well as products that lead with natural and wholesome ingredients, which consumers perceive as immunity-boosting. “In the past 12-24 months, we’ve seen more brands launch into the ‘lifestyle protein’ sub-category.” As a player in this category, the company recently launched single protein lines into multipacks to meet consumer demand, he reveals.

“Health and wellness have never been as important as they are now after a year of facing the challenges brought on by the Covid-19 pandemic,” says Mondelez trade communications manager Susan Nash. “In fact, 25% of shoppers are more influenced by health when grocery shopping than pre-pandemic⁵. Of course, wellbeing can mean different things to different people,” she observes. “We have identified four key drivers of growth within the health and wellness sector: permissible options, things that are ‘better for me’, functional nutrition offerings or snacks that are more authentic, natural and simple. If retailers can hit these key areas through different products in their snacking range, they can help health-conscious shoppers make better choices and grow category sales.”

Meanwhile, at Indie Bay Snacks, founder and CEO Dafna Bonas reveals: “We’ve quizzed thousands of respondents on what matters to them, and we consistently see the same features: calorie counts, natural ingredients and protein. The use of





HFSS: challenge and opportunity

While the government's intention to implement its high-fat, salt and sugar (HFSS) legislation may have been put back a few months (from April to October next year), those six months of grace will disappear all too rapidly for those in the snacking, confectionery and soft drinks sectors – and the retailers that offer them. Under the regulation, pre-packaged products deemed non-compliant will not be allowed to advertise on TV before the 9pm watershed, conduct multibuy promotions or be located in specific impulse areas of certain stores (over 2,000 sq ft, with more than 50 staff or part of a symbol or franchise group), such as ends of aisles, checkout areas (till and surrounding floor spaces) and store entrances.

Primarily aimed at targeting obesity, this legislation has been described as “the biggest single intervention in UK diets since rationing during the Second World War”, and snack food suppliers have plenty to say on the matter, with many embracing it as a new opportunity, despite the inevitable challenges it will pose.

● HFSS will fundamentally change how shoppers

purchase our category, says Valeo Snackfoods head of brands Claire Hooper. The crisps & snacks category is impulsive in nature – 40% of purchases are unplanned and 67% of purchases are made in-storeⁱⁱ, with shoppers using deals and aisle ends to cut through the noise and aid in purchase decisions. With these removed, we will need to employ new tactics to encourage shoppers into the aisle, therefore in-store signposting and stand-out on-shelf will become more important.”

While there will be more display opportunities for healthier snacks, consumers will only repurchase those that also deliver on taste, she notes. “Those that provide the holy grail of great taste combined with the benefits of lower fat and calorie content will continue to help drive future growth in snacking.”

● The government's proposed ban on the promotion of HFSS products provides retailers with a major issue, given that there are very few non-HFSS products currently available in the bagged snacks category, says Calbee UK commercial director Jon Wood. “This will inevitably lead to an overhaul of

ranging and pricing within the category to ensure there are products on fixture which meet the new guidelines and will be allowed in feature space, while traditional snacks will be required to optimise sales from within the aisle.”

● It's important for retailers to offer healthy options to consumers that can still deliver growth for their stores, says General Mills marketing manager for snacking Roisin Witart, adding that the ban will reinforce the interest in health snack bars. The company is working towards HFSS-compliant SKUs that will complement its existing offer, she says.

● Richard Northridge, sales director at Indie Bay Snacks, points to the “huge opportunity” for challenger brands and smaller producers to break into a crowded sector. “Not only will their focus on healthier snacking allow promotion above and beyond HFSS snacks, but research from Kantar shows consumers expect to pay more for products that show clear health claims. This means that effective on-pack communication coupled with smart promotions has the potential to create a compounding

effect that will light a fire under healthy snacking sales,” he says.

● Kind Snacks head of category Stuart Ball says the company meets regularly with key stakeholders to discuss the UK's nutrition and policy landscape, to gain insights on the HFSS nutrition model and the impact of the legislation. “As nuts are the first and predominant ingredient in Kind Snacks bars – and therefore nutrient-dense – they are disadvantaged under HFSS nutrition profiling due to their high-fat and -calorie content, and are therefore not compliant,” says Ball. However, the company's range of offerings includes non-HFSS breakfast bars made of wholegrain oats. “Kind will not deviate from brand or nutritional guardrails and will stay true to developing and delivering tasty and nutrient-dense snacks that UK consumers love,” he adds.

● Meanwhile, KP Snacks says it has worked hard to reduce salt content, since making a pledge to do so in 2018. Significant progress has been made across several key brands, including a 42% reduction on Hula Hoops and a 25% reduction

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spelt in our snacks alongside clean ingredient decks means we're offering all these benefits and more, while remaining accessible to the growing tribe of vegan consumers."

According to IGD over 50% of people⁶ are looking to make changes to their diet for health and sustainability reasons and improving personal health is the No.1 motivator in the wake of the pandemic," says Valeo Snackfoods head of brands Claire Hooper. "That said, 38% of people perceive healthy and sustainable diets to be more expensive and that rises to 48% among people who perceive themselves to have a less healthy diet, making price the biggest barrier to purchase⁶."

However, she makes the important point that "taste is key and people are only happy to make changes to their diet and eat more healthily if the food is as delicious as it was before".

Grenade managing director Phil Greenhalgh agrees wholeheartedly on the taste factor: "While low-sugar and high-protein health credentials are pivotal within the protein bar sector, taste cannot be underestimated," he says. This is something Grenade has a keen eye on, regularly innovating in the market and has led to Carb Killa becoming "the clear market leader with a 44% share of the market"⁷, he notes.

Before Grenade developed Carb Killa in 2015, protein bars didn't taste great, he adds. "We worked hard to redefine the category, ensuring we delivered great-tasting products as a priority," The result he says is that the company is "outperforming the protein bar market, with year-on-year sales rising 19% against wider market growth of 12%⁸".

"Taste is king," agrees Indie Bay Snacks' Bonas. If it doesn't taste good, it really doesn't matter what you are offering in terms of health benefits. Consumers aren't looking for negative approaches – less this, lower that, fewer of these. What they want are products offering additive value: 'enjoy flavours you love with natural ingredients and more protein'."

She points out that consumers aren't necessarily looking for wild and wacky flavours. "If you can deliver old favourites with a healthy twist, or a better version of a traditionally greasy classic, then your flavour is already safely couched in the consumers' snack repertoire," she says.





in its core McCoy's flavours. "We have made a 2.73% reduction across our total range and will continue to reduce this further again in 2022," it says. The company also notes that it has 30 products with 100 calories or fewer per pack, including popchips, Penn State, Skips, Pom-Bear and Hula Hoops Puft, with the latter growing in value by 7.4%ⁱⁱⁱ.

"Nuts are exempt from HFSS restrictions and represent a huge opportunity for growth, as they are naturally packed with protein and fibre, appealing on both taste and health cues," it adds. "KP Nuts is the number one brand in nuts, growing by 13.9% to £81.5m RSV^{iv}."

● "HFSS is the best thing that has happened to the industry in the last few years," says Fitbakes founder Ella Rauen-Prestes. "The NHS spends £6bn per year on obesity-related illnesses; that is more than is spent in the police, fire department and judiciary system combined. It's time for the food industry to take its slice of responsibility on this matter and offer healthier options that still taste good."

"Fitbakes is the only indulgent cake brand compliant with the new HFSS policy. To give you an idea, our cakes score 3 on the HFSS scale, and all the other brands score above 15. A product has to score below 4 to be HFSS-compliant."

● "Two factors are likely to influence health in the near future: external legislation pressures and consumer-driven widening of the definition of health," says Simply Roasted marketing director Ruth Fittock. "HFSS products will have a substantial impact on consumer choices, especially those relying heavily on promotions. The Simply Roasted range is the only crisp brand that's in line with government guidelines for healthier snacking."

● "HFSS brings huge opportunities – and we're ready," says Perkier managing director Ann Perkins. "Non-HFSS products will be able to capitalise on display opportunities in store, driving significant incremental sales. Perkier's range of non-HFSS snack bars offer different textures from soft to crunchy, flavours from nutty to fruity and we also provide two ranges that are zero-rated for VAT to maximise cash margin for our retail partners."

● "With the rules and regulations aimed at limiting the visibility and promotion of HFSS products in-store, retailers will be looking re-evaluate their ranges and dedicated shelf spaces," says Graze chief brand officer Pia Villa. "The majority of our Crunch and Protein Power ranges are already HFSS-compliant or in HFSS-

exempt categories. For example, our best-selling Smoky Barbecue Crunch flavour^v contains 50% less salt than the average bag of crisps."

● Liz Jacobs, head of marketing at malt bar and cake specialist Soreen, says the company has long believed there is scope for bakery to offer everyday alternatives seen in other indulgent categories, such as ice cream, biscuits and crisps. "So we're excited that the new [HFSS] legislation will bring an opportunity to innovate with product and in-store delivery. Soreen's range is compliant with the new legislation, so will continue to feature on secondary displays and in advertising."

● Nature's Heart general manager Tom Benton notes: "HFSS is an opportunity and we are in a great place to benefit from it. We have always believed in healthy snacking and this legislation should give space to products that are genuinely healthy. We currently have products in our snacking range that comply with the HFSS legislation, such as our Blueberry Cashew & Almond Immune Mix. We also have a great pipeline of new non-HFSS snacks with interesting flavours and ingredient combinations that will launch next year."

"HFSS is going to give truly healthy brands the edge. Longer-term, it will drive further growth and trial as

the healthy snacking category gets great visibility. Brands such as ours, which are investing heavily in both innovation and communication around non-HFSS will win and drive overall category growth."

● At PepsiCo UK & Ireland, the company reformulated its under-100 calorie Snack a Jacks range earlier this year to meet both flavour and nutritional needs, reveals Fernando Kahane, marketing director for Walkers Snacks. With this reformulation, he says, the company is showing its commitment to offering consumers choice, "especially as research has shown that calorie content is the number one consideration for families when making snack purchases^{vi}."

● "HFSS provides an opportunity to take millions of calories out of consumers' diets by redeveloping products to lower levels of fat," says Tayto Group marketing director Matt Smith. "The key is to ensure any compromise on taste is kept to a minimum – which is a challenge – but we believe this is achievable and expect to be launching a number of non-HFSS products in the coming months. The impact of HFSS regulations will be significant," he adds, "but the creativity of both suppliers and retailers means it can be viewed as offering just as much an opportunity as a risk."

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Taste is the No. 1 consideration for consumers when buying healthy snacks ahead of price and ingredient make-up, confirms Ball at Kind.

“Protein additions and ‘healthy indulgence’ are key to offering consumers a satiating treat with a ‘better-for-you’ ingredient profile.”

Flavour is also the No.1 purchase driver in crisps, snacks & nuts (CSN), says KP Snacks. “Seventy-six per cent of consumers recognise that nuts provide a positive source of energy and 24% of shoppers are looking to increase protein in their diet⁹. KP Nuts plays well to these dynamics with its high protein and fibre content, as well as natural vitamins and minerals.”

“Preferences for foods that fulfil health demands and convenience without compromising on taste are factors currently driving the snacking industry,” reveals Laura Trivulzio, marketing director for Peperami & Jack Link’s at LSI Netherlands. “Healthier and better for you snacking – which translates as high protein, lower sugar, gluten free and under 100 calories – have clearly become key benefits consumers continue to look for. The total meat snacking category has grown by 26% vs last year¹⁰.”

Clean-label is becoming a watchword in the snacking category as much as in any other sector, with consumers attracted by natural and wholesome ingredients.

“More and more shoppers have been avoiding ‘processed’ and high sugar snack bars and switching to whole and raw ingredients such as nuts, fruit and wholegrain,” says General Mills’ Witart. At the start of 2021, the company launched its Nature Valley Protein Soft Bakes in Oat & Honey and Blueberry & Almond flavours, containing 8.4g of protein per bar, which she notes will be attractive to the 38% of consumers looking for protein content in their breakfast cereal bars¹¹.

Meanwhile, Bel UK has launched The Laughing Cow Blends, bringing chickpeas and herbs to its creamy cheese spread. “With the taste of the product close to the on-trend flavour of hummus, the new launch has the opportunity to attract a younger audience to the brand,” says brand manager Oliver Richmond.

While consumers are interested in healthy alternatives (72% already



buy or would buy¹²), there is a concern that taste will be compromised and they “won’t be worth the calories”, points out Tayto Group marketing director Matt Smith. “The majority of savoury snack consumers are looking for ‘low & no’ – [equating to] lower fat, salt, calories and no artificial ingredients – rather than ‘positive’ health connotations.”

“Certain ingredients rise in popularity for snacks at different times of day or different occasions, too,” says Mondelez’s Nash. “Oats are the most popular ingredient in breakfast snacking¹³, for example, which makes brands like belVita a key part of a retailer’s breakfast range.”

“Inulin is a magic ingredient,” says Fitbakes founder Ella Rauen-Prestes. It’s liquid fibre (gut health friendly), brings sweetness without the sugar content (low sugar friendly), has reduced calories and is even plant-based – it doesn’t get better than that.”

Flavours – savoury

Within savoury snacking the core flavours – sea salted, cheese & onion, salt & vinegar, prawn cocktail and beef – still command the majority share of the market, says Jon Wood, commercial director at Calbee UK. “What we are seeing is that modern variations of these traditional flavours are most likely to succeed. For example, sour cream & chive and Thai sweet chilli have established themselves in the market over the past few years and can be seen as more premium and adventurous choices.”

Tayto Group’s Smith agrees that the core flavours of cheese & onion, salt & vinegar, sweet chilli, BBQ and sour cream & onion remain the best-sellers. However, hot and spicy flavours continue to be on-trend and create interest with consumers, as shown by the success of its Golden Wonder Spicy Bikers in the £1 sharing segment, where it has become a top 10 best-seller within

Functional products gain consumer favour

"We have witnessed protein and functional snacks gaining momentum, offering consumers products that keep them satisfied throughout the day," says Laura Trivulzio, marketing director for Peperami & Jack Link's at LSI Netherlands. The company's Peperami brand recently launched Chicken Bites, which she says has driven "over 80% of incremental sales so the branded chicken snacks sub-category"^{vii}.

With Google searches for healthy snacks rising by 110%^{viii}, Bel UK's latest NPD has focused on "the

increased appetite for more functional foods", says brand manager Oliver Richmond. "Babybel + Vitamin is rich in vitamin B12 and Babybel + Live Cultures contain one billion LGG cultures, contributing to the normal function of the immune system."

Both Tom Benton, general manager at Nature's Heart and Ann Perkins, managing director of Perkier point to immune support as a key driver [in snacking. "There was a 670% increase in Google searches for 'food' and 'immune system' in February and March 2021^{ix}," says Benton.

"We launched our Immune System snacking range last year in response to market demand for more health and wellness choices. Each product is packed with a combination of different fruits, nuts and seeds and is a natural source of key vitamins and minerals that support normal function of the immune system."

"94% of healthy snackers find immune support appealing^x," agrees Perkins. "Perkier vitamin-packed immune bars are the best-selling single bars in Sainsbury's free-from fixture^{xi}."

In addition, gut health is an emerging trend, with over 30% of UK consumers now seeking foods to improve that aspect of their wellbeing^{xii}. Perkier has a range of snacks in Morrisons with billions of probiotics and 5g prebiotic fibre for a happy healthy gut, she says.

"Containing added vitamins, high in protein and low in sugar, Fulfil has identified a gap in the market to create a unique snacking range that delivers on health and taste in equal measure," says managing director Steve Rich. "The trends towards increased physical

activity, mindfulness and a focus on food and nutrition are here to stay, with immunity playing an increasingly important role and vitamins a key element."

"With health-conscious consumerism on the rise, the snacking market is turning to natural ingredients to provide on-the-go functionality," says Simply Roasted marketing director Ruth Fittock. "Keto and gut health and snacks that have ingredients such as adaptogens, nootropics and even CBD are increasingly popular, especially with Millennials."

a year of launch¹⁴, he says.

"Spicy (+7.1%), meaty (+5.8%) and BBQ (+4.5%)¹⁴ are the fastest-growing flavours in crisps, snacks and nuts (CSN)," says KP Snacks. The company recently launched McCoy's Fire Pit, with three products inspired by open fire or 'wood-fired' cooking, including Flame Roasted Peri Peri, Flame Smoked Chorizo and Flame Scorched BBQ Ribs.

Over in the 'better for you' segment, meanwhile, shoppers are demanding new and exciting flavours that offer something unusual," says Fernando Kahane, marketing director for Walkers Snacks at PepsiCo UK & Ireland. "As part of this we're seeing demand increase for herbs and spices flavour profiles¹⁵, which is something we've tapped into as part of our innovation pipeline." In March, the company launched the new Roast Onion & Turmeric flavour as part of its SunBites brand. Also, launching in the UK in Q4, Kurkure – one of the biggest snack

brands in India and Pakistan – is "a perfect example of a product made with intense flavour and different ingredients. Made with dal (chickpea) rice and corn, it features Naughty Tomato and Masala Munch flavours.

One of the trends observed at Valeo Snackfoods is 'Accessible Gourmet', whereby consumers are seeking authentic food experiences from around the world to enjoy at home, says Hooper. Given the lockdown restrictions, "people are looking for culinary dishes and tastes that allow them to travel around the world without leaving their kitchen", she says. This has led the company to introduce Thai Sweet Chilli to its Kettle range last year and, this summer, it introduced Kettle Steakhouse Barbecue "inspired by authentic American BBQ grill tastes". Its Manomasa tortilla chips range, inspired by Mexican street food, is also well-placed to capitalise on the popularity of Latin American food, she notes.

As well as world travel, recreating popular restaurant flavours has been a theme adopted by a number of companies. "Our latest campaign has seen us create four new limited-edition flavours inspired by the UK's best-loved local restaurant dishes – Madras Curry, Thai Green Curry, Fish & Chips and Chicken Burrito – which launched in August this year, says PepsiCo's Kahane.

Flavours – sweet

That hunt for world flavours extends into the sweet snacks sector, with Tom Benton, general manager at Nature's Heart, pointing to the boom¹⁶ in globally inspired cuisines. "We are the world's largest producer of goldenberries from South America, where our journey began," he says. "We have found that balancing new with more familiar flavours really works for our audience. For example, we cover our exotic dried goldenberries with rich dark chocolate or pair goji berries with

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cashews, almonds and blueberries to offer a good balance of traditional and more adventurous flavours.”

Yet, despite the fact that new flavours and innovations are constantly coming to the market, chocolate remains one of the top flavours that will have a broad appeal to a large range of shoppers, says Levi Boorer, customer development director at Ferrero. “Consumers are looking for small portions that suit their lifestyle choices without having to compromise on taste.” Kinder, which has extended from its heartland confectionery sector into chilled snacks and biscuits, is on course to have its best year ever, he reveals, with Kinder Cards – thin individually wrapped snacks – launched in the summer.

“Within chocolate snacks, great-tasting ingredients and flavour combinations – such as orange, mint, hazelnut and caramel with chocolate – remain incredibly popular,” says Mondelez’s Nash. “In fact, Cadbury Twirl Orange is now our most popular single chocolate bar⁷, despite only hitting shelves permanently last year. New Cadbury Wispa Gold Hazelnut flavour is also tapping into a popular flavour combination.”

Fulfil’s Rich points to salted caramel, peanut and brownie as some of the most popular snack bar tastes, while Kind’s Ball agrees with Nash that chocolate orange has led the way in driving sweet snacking innovation growth across confectionery, biscuits and snack bars in the past 18 months. The company recently launched its own Dark Chocolate Orange Almond Bar, which he says has been its “strongest-performing singles NPD ever”.

Perkier managing director & co-founder Ann Perkins cites salted caramel, peanut, Madagascan vanilla and nutty toffee as appealing flavours in healthy snack bars. These, she says, are best-sellers in Perkier’s ranges with “flavours that offer indulgence and products that deliver on health”. Niche flavours are to be avoided, she adds, as they “limit the market opportunity”.

Grenade has brought back its Gingerbread Carb Killa Protein Bar for a limited time only, with a soft gingerbread-flavoured nougat centre, layered with caramel and dark chocolate chips. “The new bar has been smothered in milk chocolate with a



blitz of white chocolate on top,” adds Greenhalgh. “We’ve had a lot of interest in bringing it back, so hopefully we’ve surprised a few people.”

Fitbakes is launching low-sugar millionaire Caramel Cakes in the next few weeks. “It’s a classic flavour,” says Rauen-Prestes. “We learned that, in the British cake market, you have to play with the classics. Brits know their cake.” The company also plans to launch a low-sugar Mint Chocolate Crunch Bar in the next few months.

Sustainability and environment

Three in five shoppers now think more about sustainability when shopping than they did five years ago¹⁸, says KP Snacks. “Reduction is the first phase of our packPromise, a three-stage plan to minimise the environmental impact of our packaging with the goal of making all of our plastic packaging fully reusable, recyclable or compostable by 2025,” it says. Last year the company

removed 77 tonnes (t) of plastic packaging across Hula Hoops, Tyrrells and popchips, with planned projects this year aiming to remove a further 410t of plastic from its packaging chain.

Mondelez has set itself the “ambitious target” of 100% recyclable packaging and 100% sustainable cocoa sourcing globally for chocolate by 2025, reveals Nash. More locally, it has joined forces with several other large branded manufacturers in the UK on the £1m Flexible Plastic Fund to help make flexible plastic recycling economically viable for recyclers and easier for consumers. This aims to give flexible plastic a stable value, thus increasing the supply of recycled plastic and enabling the industry to become more circular and meet the forthcoming UK plastic packaging tax obligations.

While committed to moving to more sustainable packaging, Tayto Group’s Smith acknowledges the lack of kerbside recycling for flexible plastic

Plant-based trend keeps growing

“The plant-based trend shows no sign of waning, with people classifying themselves as non-meat-eaters increasing by 6% vs the start of the pandemic^{xiii},” says Valeo Snackfoods head of brands Claire Hooper.

“Plant-based offerings are the central component to our product offering,” says Stuart Ball, head of category at Kind. “Next year, we will continue to introduce products that are nutrient-dense and plant-based across all of our ranges.”

KP Snacks says more consumers are actively choosing diets that incorporate

more veg and plant-based foods, with nuts growing in popularity. Recent introductions from the company include its popchips Veg Vibes range, made of chickpea rice, and Tyrrells Lentil Crisps, in Sour Cream & Onion and Sweet Chilli & Red Pepper flavours.

Insights show that more than two-thirds (68%) of British consumers have considered or are open to considering a transition to a vegan diet^{xiv}, says Bel UK brand manager Oliver Richmond. As dairy-free alternatives to cheese are growing faster than [traditional dairy-based]

cheese^{xv}, plant-based cheese alternatives present “a clear sales opportunity for retailers”, he says. The company will follow up its soft launch of Nurissh Plant Based Alternative to Camembert in Sainsbury’s with two further plant-based products a Mozzarella Style Block and a Cheddar & Mozzarella Style Blend Grated. The full range also launched in Asda at the end of March.

Both the meat-free and meat snacking categories have grown side by side, with “feeling good” cited as the key motivation for meat-free choices, says Laura Trivulzio,

marketing director for Peperami and Jack Link’s at LSI Netherlands. Peperami recently announced its move into the meat-free category for the first time, launching Vegerami Chick’nless Bites in Pep’d Up and Smokin’ flavours, made from pea protein and “appealing to nutritionally aware young adults and families”.

“The savoury bagged snacks aisle has not traditionally had an overtly plant-based option,” says Calbee UK commercial director Jon Wood. “Harvest Snaps is the first brand to be marketed

as plant-based, being made from lentils, chickpeas and peas, with the added benefits of lower calories, baked not fried, vegetarian, vegan, gluten-free and non-HFSS compliance.”

Soreen head of marketing Liz Jacobs says it can be difficult and expensive to find a plant-based sweet treat. “So we’re pleased to be able to offer our malt and fruit loaves as an option.” The company declared its whole range (excluding its pre-buttered slices) vegan this year, with many of its fruit flavoured loaves already naturally dairy-free.

means there is currently insufficient recycled material to create a circular economy for flexible packaging. “Recent moves by retailers to provide flexible packaging recycling facilities at store are therefore a welcome step forward,” he says, adding that the company has reduced annual film use by over 370t over the past five years through a combination of reducing pack dimensions and other measures.

General Mills has a three-pillar approach to nutrition and CSR: good food, good for the planet and good for communities, says Witart. It aims to reduce greenhouse gas emissions by 30% by 2030 and is targeting carbon neutrality by 2050, she says.

Sustainability is at the heart of Perkier’s mission, says Perkins, with snacks that “taste good, do you good and don’t mess up the planet”. The company is B-Corp certified and has set a goal to be net-zero by 2025. “Our packaging is 100% recyclable and

we are continuously reviewing new packaging technologies as they become available to further improve our sustainability footprint.” The company also prides itself on being palm-oil free and partners with International Animal Rescue to raise awareness of the “devastating impact palm oil has in critically endangering orangutans”.

2025 is also the deadline Bel UK has set itself to achieve 100% recyclable or compostable packaging. The company joined the TerraCycle scheme in the UK last year and invests in a substantial equity campaign, inspiring consumers to ‘Join the Goodness’ by encouraging more mindful snacking, says Richmond.

At Valeo Snackfoods, there is “a substantial plastic reduction project under way, which together with our savings from 2020 will remove 198t of plastic from our packaging, equating to 33 full size elephants”, says Hooper. “We’re looking at ways to reduce this

even further and fully support a move from single-use plastic.”

Meanwhile, Kind Snacks has conducted several consumer focus groups to learn first-hand sentiment on packaging sustainability and enable continuous feedback on its approach, says Ball. “Kind is trialling new materials that are better for our environment and, by the end of this year, we will transition to wrappers that have 17% less plastic. Next year, we will embark on phase two of our packaging sustainability journey and transition to wrappers made with post-consumer recycled plastic.”

At the Graze factory and bakery, the company has already “made great strides, with electricity 100% carbon neutral, generated by a wind farm in Scotland, reveals Villa. “We also recycle over 50% of our waste on site and have a waste reduction target of 20% year-on-year.” In addition, 83% of the company’s packaging is already

Analysis

fully recyclable and 79% plastic-free with more progression to come. Its pledge is to be carbon-neutral by 2030.

At Nature's Heart, The Goldenberry Plan is the company's "responsible sourcing programme that helps improve livelihoods for thousands of farmers in Ecuador and Colombia, whom we partner through secured volume, fair prices, no child labour and continuous agricultural training", says Benton. In addition, the company is using mono plastic in its films to improve the recyclability potential of its range and launched its latest Immune line in a recyclable PE film.

Outlook

So, the future looks full of continued challenge and opportunity for the snacking category, as it flexes to meet continually evolving consumer demand.

Given the current difficulties faced in the supply chain, however, Calbee UK's Wood sounds a note of caution: "The most pressing and immediate challenge all crisp and snack manufacturers are facing, along with all other food producers, is the exponential rise in costs we are experiencing. If the situation doesn't soften imminently, it will inevitably lead to sizeable price increases at shelf edge."

That said, there is plenty of optimism for the ongoing performance of both the healthier and more traditional snacking sectors. "Latest industry figures to July 2021 show that the healthier bar segment is outperforming impulse snacking and growing by 46%¹⁹ year on year," says Fulfil's Rich. "Protein bars now account for 60%²⁰ of healthier bar sales, overtaking cereal bars as the number one segment."

The future looks extremely bright for the snacking market, agrees General Mills' Witart, noting that healthier snack bars are forecast to grow 14%²¹ over the next three years as confectionery and biscuits become a smaller part of the snack repertoire.

While 2020 has been "tough" for snacking, the category is recovering extremely quickly in 2021, says Ball at Kind. "We see healthy snacking as a driver of category growth moving forwards, with Euromonitor projecting that this sector will see a 6% CAGR out to 2026²², which is well in excess of some traditional snacking categories."

Even in the more traditional



categories, there is positivity. "CSN is a fast-growing priority category with huge scale, worth £3.4bn and growing at 3.3% YoY²³," says KP Snacks. "Our snacks are consumed by over 20m households and our portfolio has delivered 48% of category growth in the last five years²⁴."

Meanwhile, formats in the market are regaining some equilibrium as out-of-home snacking returns.

"Following the massive growth of take-home formats over the past 18 months, we are expecting to see shoppers take a more balanced approach to crisps and savoury snacks as on-the-go consumption increases, albeit not to pre-pandemic levels," says PepsiCo's Kahane. "Working from home is here to stay, and at-home lunch occasions will also remain as a result."

Home working is here to stay, with 37% of the UK workforce working from home in 2020 and 85% of homeworking adults saying they want a hybrid approach going forwards²⁵, agrees Valeo Snackfoods' Hooper. "It's an exciting yet challenging time. The snacking category is becoming much broader with more traditional crisps and snacks now sitting alongside a wealth of other products, including popcorn, crackers, popped and extruded snacks. The key is for more traditional products to provide relevant

innovation of their own, while the burgeoning healthy arena continues to offer wider market expansion opportunities.

"Yet even as healthier offerings grow, it's important to remember that taste and quality will always be key in treating."

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Fitbakes

Healthier bake options for shoppers

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KEY BRANDS

Fitbakes cakes and
crunch bars

With the UK facing an obesity epidemic and Covid-19 making people even more aware of the danger of obesity-related illnesses, offering healthier cake and confectionery products is becoming essential.

Fitbakes says it is the only indulgent cake brand compliant with the UK's new HFSS policy, noting it has absolutely no compromise on taste. "Everyone enjoys a cake or a chocolate bar, but who wants to dunk a protein bar in a cup of tea? We're showing consumers you can have your cake and eat it."

With more than 65,000 followers on social media, Fitbakes is an official partner of Weight Watchers on its Wellness Wins programme, and will be launching in 1,000 Tesco stores next month as part of a meal deal. "Given Fitbakes' digital background, we do a lot of geo-targeted digital ads, reaching people that fit our audience profile. We drive the audience into the store," it says.

"We have a centre stage brand name



"We're showing consumers you can still have your cake and eat it"

on-pack to maximise brand recognition on-shelf and the key claims are clear, with calorie count very visible.

"Fitbakes still has one launch in 2021 – the low-sugar protein Fitbakes Millionaire Caramel Cake, coming out in the next few weeks," it adds. "We are also looking at multipacks and more single cake bar options to help consumers with their Fitbakes choices."

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Bel UK

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Boursin
Babybel
Port Salut
The Laughing Cow
Nurishh

As consumers return to routine following lockdown restrictions, health is firmly on the agenda, with Google searches for 'healthy snacks' up by 110%¹. "Catering to consumers broadening their repertoire and seeking a wider range of healthier snacks, Bel UK is diversifying its range with a plethora of exciting insight-driven innovations," reveals brand manager Oliver Richmond

"Evolving from a focus on cheese to a broader focus on snacking, Bel's loved brands – such as the No.1 snacking cheese brand², Babybel, and the No.1 Cheese Spread Portion³, The Laughing Cow – deliver on the need for healthier snacking choices, as well as meeting the demand for convenient and versatile formats in an array of fun, portion-controlled options."

Healthy sales

"A must-stock for retailers looking to maximise healthy snacking sales, Babybel has unveiled two new additions to its market-leading line-up this year," says Richmond.

Catering to the consumer appetite for healthy grab-and-go options, Babybel Plus is the brand's first-ever functional cheese snack line specifically for the food-to-go category. With functional food formulations being one of this year's biggest trends, Babybel Plus meets consumer demand for health-focused grab-and-go snack options, launching with two variants, Babybel + Live Cultures and Babybel + Vitamins.

"Both rich in protein and calcium and delivering the much-loved taste and convenience of Babybel Original, Babybel Plus is delivered in two-pack portions" he adds. "Meanwhile, Babybel + Vitamins is rich in Vitamin



“Evolving from a focus on cheese to a broader focus on snacking, Bel UK's brands deliver on the need for healthier snacking choices, as well as convenient and fun formats”

B12, Babybel + Live Cultures features a billion active lactobacillus (LGG®).

"Also, Babybel recently launched Babybel Light Cheese, Apple & Grapes nationwide in partnership with Jupiter Group, in the food-to-go fixtures of Tesco, catering to the elevated interest in healthy snacks⁴ with the fun addition of fresh fruit produce."

Innovative category firsts

Having innovated for 100 years, The Laughing Cow sees 230 of its triangles bought every minute⁵ and 8m shoppers enjoying the brand each year⁶.

"Recently updating the Original triangles recipe, now made with only four dairy ingredients, the brand also bolstered its market-leading line-up with the launch of The Laughing Cow Blends," says Richmond. "This new category-first combines the creamy goodness⁷ of The Laughing Cow cheese spread with the deliciousness of chickpeas and herbs. Naturally rich in protein, portion-controlled, and presented in a portable, user-friendly format, the individually wrapped triangles keep the delicious cheese spread blend fresher for longer. With no artificial flavours, colours or preservatives added, and 36 kcals per portion, it's perfect for spreading on a cracker or as a standalone snack."

Source

¹ Data from medical advice service Flawless.org

² IRI, Total Grocery + Discounters CYTD, 24.07.21

³ IRI, Value sales total market, MAT 24.07.21

⁴ Calcium is needed for the maintenance of normal bones & teeth as part of a varied, balanced diet and healthy lifestyle

⁵ IRI, Unit sales total market, MAT 24.07.21

⁶ Kantar, Penetration total market, MAT 08.08.21

⁷ Protein contributes to the growth of muscle mass





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1. IRI Total Grocery Outlets + Discounters, value sales 52 w/e 24/07/21

2. Kantar WOP, Babybel penetration within lunchbox cheese, 52 w/e 11/07/21



Calbee UK

Confidence for the future

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Harvest Snaps



“It’s an exciting time at Calbee UK, with a £5m investment programme increasing both our manufacturing capabilities and our capacities, enabling us to diversify and innovate within the snacking category while building brand growth,” comments Daniel Woodward, group MD of Calbee UK.

“Our Bradford factory, the home of Seabrook Crisps, has seen a £3m investment, contributing to a successful year for the brand. Seabrook is now the largest crinkle-cut brand in the market and the second-largest multipack crisp brand with 50 million packs sold in the last year¹.

“The brand is now worth £65m and we’re really proud it is growing faster than the overall category (+11.3% year-on-year), with an increase of 25.8% year-on-year¹.

“We’ve extended the brand proposition by launching a modern, on-trend twist to everyday snacks with Loaded Fries, Cheese & Bacon and Chilli Heat, with the big, bold flavours that the Seabrook brand is renowned for,” he reveals.

“Collaborating with branded partners such as Lea & Perrins to produce Seabrook Worcestershire Sauce flavoured crisps has also contributed to brand growth.”

Back on TV

However, it’s not just investment in manufacturing that has led to success, acknowledges Jon Wood, commercial director. “Earlier this year, Seabrook Crisps returned to TV advertising for the first time in almost 15 years with its national ‘Brilliant by the Bagful’ campaign, which went on to win gold at the Drum Roses Awards in May for Best Art Direction,” he says.

Innovation and HFSS resilience

Investment was not solely in Bradford; the culmination of a £2m project at Calbee’s Deeside factory has created greater flexibility in the shapes and bases of snacking products manufactured, opening up innovation opportunities for the business.

Wood continues: “Harvest Snaps,



Brilliant by the bagful

“Made from vegetable and pulse bases, the new snacks are baked and not fried, and with under 100 calories per portion, Harvest Snaps is bang on-trend”

a new range of plant-based products, falling below the proposed government HFSS restrictions, is the first brand creation enabled by our Deeside investment.

“When the new legislation comes into force next year, Harvest Snaps can still be merchandised in promotional display space.

“Made from vegetable and pulse-based snacks that are baked and not fried and with under 100 calories per portion, Harvest Snaps is bang on-trend, given the growth in plant-based diets for both environmental and holistic health reasons. The brand is lower than traditional crisps and snacks on salt, fats and saturates and, most importantly, tastes great.

“We believe Harvest Snaps is the first brand to provide retailers with a solution to potential HFSS issues and we have high hopes for it in the ‘better for you’ category – in which there is still massive headway to reach penetration levels of the total market. Delivering better value and snacks which don’t compromise on taste is key to this.”

Woodwards sums up: “There’s no doubt the Covid-19 pandemic and Brexit have thrown up many challenges, from coping with fluctuations in demand, changing consumer habits, to supply chain issues. But with strategic investments, a sound plan and a great team to bring it all together, I am confident of the way ahead at Calbee.”

Source

¹ Kantar, Total Crisps, Snacks, Nuts and Popcorn, 16.05.21

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Following an extended period of uncertainty, with changing guidance impacting how much time people were spending on-the-go at places of work or at home, the snacking category has been able to constantly adapt to meet shopper needs. Whether to suit new habits forged by spending more time at home or by offering popular flavours in new ways, the category has been resilient in the face of varying consumption habits.

“Following a move to multipacks of popular treating options when lockdown restrictions were at their tightest, we expect to see singles come back to prominence as people venture out more and return to their places of work more regularly,” says Levi Boorer, customer development director at Ferrero. “We have launched several new products that suit a range of treating occasions, each coming in single-serve and multipack formats to help consumers enjoy their favourite products in moderation.”

Dealing a winning hand

Expanding Ferrero’s presence in the biscuit category, Kinder Cards launched this summer to bring the distinctive milk and cocoa taste that the brand is loved for to a new sector, Boorer says. With 49% of shoppers visiting the biscuit aisle¹, the range – including single-serve packs of two cards, as well as a multipack of four (eight cards) – Kinder Cards will appeal to existing shoppers as well as attracting new ones to a widely recognised family brand.

“Now, more than ever, shoppers have a functional approach to their visits and a clear idea of the products they need before entering a store,” Boorer adds. “With products from well-loved



“Now, more than ever, shoppers have a functional approach to their visits and a clear idea of what they need before entering a store”

brands, retailers can secure more impulse purchases. Kinder Cards, thin and individually wrapped, are perfect for the family to enjoy and support retailers looking to drive sales for both on-the-go and at-home consumption.”

A new chocolate biscuit bar

Duplo brings Ferrero’s expertise in hazelnut and chocolate to the category, and the product is set to reinvigorate the chocolate biscuit sector following exceptional performance across other markets in Europe, reveals Boorer. Featuring two delicate layers of crispy wafer, sandwiched between a smooth hazelnut centre and coated in milk chocolate, each biscuit bar is 100 kcals to provide a delicious on-the-go treat.

Early consumer testing in the UK and Ireland showed that Duplo has a wide appeal across age groups, particularly among adults aged 24-45², he adds, due to its distinctive nutty flavour and creamy texture.

“The initial positive consumer response shows this launch can help retailers shake up their chocolate biscuit fixture,” explains Boorer. “The varied product formats and pack sizes give Duplo appeal across different shopper missions, offering something new as on-the-go purchases return and allowing consumers to manage their treating with our larger multipacks.”

**Source**

¹ Shopper intel/Biscuits/2018
² CPT Research

NEW

Kinder Cards

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Belgian Chocolate Coated
Nuts & Dried Fruits
Preda Mango & Dried Fruits
Toppers & Gluten
Free Granolas
Seasonal Snacks & Nuts



Premium snack brand Forest Feast has built on its core portfolio with the launch of Vegan 60% Cocoa Dark Chocolate Dipped Fruit.

Bronagh Clarke, marketing director at Forest Feast says: “One of the biggest trends for 2021 is the ‘clean-treat’ trend, where consumers are looking for permissible treats – indulgent but with a healthier and more conscious slant. We have seen chocolate-dipped fruit gain traction in the US and that trend will follow here in the UK.

“At Forest Feast we create the most delicious flavours, textures and tastes. The range takes the best of our dried fruit, dipped in-house in rich indulgent 60% cocoa dark chocolate,” she adds.

In a move to increase its offering, Forest Feast is extending the successful Slow Roasted & Seasoned Nut range, with a new Sea Salt & Cider Vinegar Nut Mix, due for launch in the new year.

“We know that salt & vinegar is one of the nation’s favourite flavours and we have had repeated requests from consumers, so have developed a piquant Sea Salt & Cider Vinegar Nut Mix to add to our Slow-Roasted Nut range. Consumer taste panels have indicated an 88% propensity to purchase with a 96% repeat intent, so we think we’re onto a winner.”

Premium snacking on-the-go

With the easing of government restrictions, coinciding with more back-to-office working and increased travel taking place, the brand will launch a range of six premium impulse snacks, comprising their best-selling snack lines, in a convenient on-the-go format.

The range will be gluten-free



“With snacking occasions on the rise again, we wanted to ensure consumers had choice at the premium end of the market”

and vegan/vegetarian-friendly, in recyclable packaging and with four of the six being compliant with the new high-fat, -sugar & -salt (HFSS) guidelines due to roll out in 2022. This puts the brand in a strong future-proofed position. Also, reformulation of key lines and innovation have been stepped up to guarantee that retailers have plenty of snacking choices to offer to consumers.

“With snacking occasions on the rise again, we wanted to ensure consumers had choice at the premium end of the market,” says Clarke. “We know this will also encourage trial of the products before trading up to the larger purchases for at-home consumption.”

The Wonderful World of Forest Feast

The past 18 months have seen the Forest Feast brand evolve, with a refreshed brand world coming to life across media, in-store and at exhibitions.

Vibrant jewel-coloured packaging gives great on-shelf presence with core ingredients called out front-of-pack. It is this ingredients provenance paired with the hero product that has introduced the concept of ‘The Wonderful World of Forest Feast’, inviting consumers to learn more about the provenance and the expertise that goes into crafting these delicious snacks. This will be further supported by the relaunch of the Forest Feast website in the autumn. Clarke adds: “When consumers step into the Wonderful World of Forest Feast they know they are getting exceptional quality products, sourced ethically and sustainably.”

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FULFIL

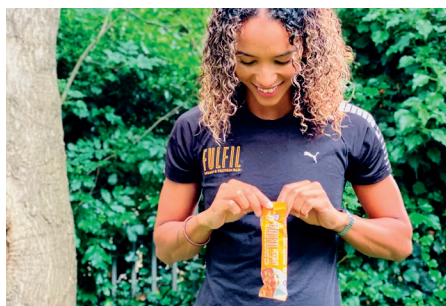
➡ Fulfil is the fastest-growing brand within UK healthier snack bars, growing by 114%¹, and there are three simple and unique reasons, says Steve Rich, managing director of Fulfil. “Firstly it is all about taste and, following research, we know consumers have a clear taste preference for Fulfil ahead of other bars within the protein bar sector. There is increasing demand for functional snacks that taste great and Fulfil meets that sweet spot of providing great taste at the same time as providing nutritional benefits.

“It’s also important that when people try healthier bars for the first time, their experience encourages them back, in turn driving category growth,” he adds. “As well as taste, our brand is unique, as our bars contain nine essential vitamins, delivering a third of the recommended daily allowance, as well as being high-protein and low-in-sugar. The ongoing focus on wellness and immunity has been accelerated further by the pandemic, where prioritising better care, both physically and mentally, is more relevant than ever.

“We have an unrivalled range of formats with our 40g bars meeting the on-the-go snacking mission, the ideal companion to a coffee or as part of a meal solution. Our 55g bars provide a bigger eat, ideal to fuel a larger appetite and are also a great post-workout snack. Finally, our new multipack formats (3x40g), designed for those who want to have healthier functional snacks in the home, are launching from September.”

Clear communication

Fulfil has also focused on making it easier for shoppers to understand the



“It’s important that when people try healthier bars for the first time, their experience encourages them back, in turn driving category growth”

benefits in its bars, by visibly showing ‘9 Vitamins’, ‘High Protein’ and ‘Low Sugar’ on-pack, so they can make an informed choice. “We have invested heavily on in-store execution and visibility, helping retailers to signpost the category, where Fulfil can play a leading role,” explains Rich.

“In the rest of the year, we will be supporting our recent innovation with the new Fulfil Chocolate Caramel Bar and the new multipack formats, both in-store and across our media platforms. We are proud to have brand ambassadors that are passionate about Fulfil and will play an active role as part of our team.

“In 2022, we will be investing heavily in connecting with and recruiting consumers, focusing on social and digital first, and we have lots of exciting news for 2022, which we will share with you very soon.”

Source

¹ IRI, UK scanning data, 12 weeks to July 2021 vs previous year

FULFIL

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*Source: IRI UK data to July 2021.
12 weeks vs previous year.

General Mills

Shaking up healthy snacking

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Fibre One
LÄRABAR

Despite the challenges posed by the pandemic, including the decline of the on-the-go sector, snacking is still an important category for retailers and shoppers, and is expected to increase by 2% over the next three years¹, says General Mills.

However, habits have shifted. People are moving towards more permissible options, with healthier snack bars forecast to grow 14%² as confectionery and sweet biscuits become a smaller part of the snacking repertoire.

A high-performing portfolio

General Mills' Better For You Snacking brands have seen great success over the last 12 months, injecting excitement into the category thanks to a host of NPD and campaign launches, reports the company. The portfolio – including Nature Valley, Fibre One 90 Calorie and Lärabar – has seen growth of £7.6m, with a combined value of £100m³.

Fibre One has played a significant part in this success, and is now the third-biggest brand in the category, contributing £6.5m⁴ in growth. “This can be attributed to the fact it sits firmly in the sweet spot between health and treating,” says the company. “While offering shoppers a delicious range of bars based on popular goodies – from chocolate fudge brownies to red velvet cake – its 90-calorie proposition allows reassurance for the consumer. Plus, the brand ramped up its permissible indulgence credentials last year, reducing the sugar content of its brownie range by 30% – all without compromising on taste.”

For shoppers leaning towards whole and raw ingredients, Nature Valley's new ‘real food’ bar, Full Mix, made its UK debut this year. “Available in



“People are moving towards more permissible options, with healthier snack bars forecast to grow 14%² as confectionery and sweet biscuits become a smaller part of the snacking repertoire”

Peanut Butter & Blueberry and Peanut Butter & Cranberry, the range is a truly indulgent, yet wholesome snack,” it says. “Our gluten-free, dairy-free, and vegan snack bar brand Lärabar – made with no more than six ingredients – also meets the demand for minimally-processed options that suit a variety of lifestyles.”

Meanwhile, with 38% of consumers who eat cereal bars for breakfast looking for protein content⁵, Nature Valley Protein Soft Bakes, launched in January, contain 8.4g of protein per bar and therefore meet this specific, previously underserved, need.

HFSS-proof

The upcoming HFSS ban looks set to reinforce the interest in healthy snack bars, as shoppers look for an alternative to HFSS chocolate or confectionery.

Through continued innovation and working hard to meet the needs of its shoppers, General Mills has ensured it will meet this demand with a variety of better-for-you options, it says. “Our portfolio offers a great variety of healthy snacking options, and we are working towards HFSS-compliant SKUs.

“Our Nature Valley Family Packs will keep delivering value for our consumers in a post-HFSS world, all while delivering amazing taste, which we know is the number one purchase driver of the category⁶.”

Source

¹2 Euromonitor Snacking Forecast, 2021-2024

³Nielsen, Total coverage including Discounters, MAT to 03.07.21

⁴Nielsen, Total coverage, Latest 52 weeks to 01.05.21

⁵NielsenQP & Mindshare Receptivity UK Survey, N=1500 July 2019

⁶Kantar Covid-19 Barometer Wave 4 2 Top Box



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graze

Redefining great snacking

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KEY BRANDS

graze

From the very beginning, Graze has always been focused on rewriting the snacking rulebook for healthy people and planet, and it does not plan to stop any time soon. By listening to its community of over 5 million grazers, the No.1 healthy snacking brand¹, has adapted its snacking portfolio to meet changing consumer demand, creating a range that inspires the nation to choose healthy snacking day after day.

"We stand against what's wrong in traditional snacking and we're on a mission to offer healthier alternatives with our broad portfolio of cereal bars, snacking nuts and on-the-go snacks," says Pia Villa, chief brand officer at Graze. "We don't want snackers to feel like they are compromising when they choose health. We believe consumers can have health and taste in one bite, and that's what Graze aims to deliver every single day. Our latest NPD launch, Wow Bakes, is a great example of this. With 90kcal and no artificial ingredients, Wow Bakes delivers delicious taste without the guilt factor."

Graze also continues to push its agenda of being a force for good, she adds, achieving B Corp certification in 2021, joining a strong line-up of businesses committed to balancing purpose and profit.

Daring to reimagine

Looking ahead, Graze sees a huge opportunity for growth in healthy snacking in 2022. With its unique non-HFSS product ranges, and cutting-edge HFSS data analytics tool, Graze is helping retailers prepare for the HFSS transition and the growth opportunities that lie within. "Known by 90% of the UK², and the market leader in terms of brand differentiation³, Graze is the brand that retailers can continue to back now and beyond," says Villa.

Health is incredibly important to shoppers, with 92% of UK adults saying they take precautions with food and drink to protect long-term health⁴. However, more than half (52%) are tempted by unhealthy choices making this a key barrier to being healthy⁵. As we see the health trend



"We don't want snackers to compromise or feel unsatisfied; instead, we want to offer options that are genuinely tasty and healthy too"

return, shoppers are choosing Graze, represented by our outperformance across the market in the recent 13 weeks' timeframe, in all three categories we operate in⁶.

"All our snacks contain added nutritional benefits and are well-balanced delicious snacks," adds Villa. "Our category-leading health promise on sugar also makes us stand out. Since 2019, we've removed 160 tonnes from our snacks, and we're not stopping there. Our Oat Boosts now contain up to 60% less sugar than the average cereal bar, while our Wow Bakes contain 40% less sugar."

With 26 recipes spanning 57 different formats, Graze delivers variety and choice for shoppers across a range of consumption moments during the day, notes Villa. Whether grazers are looking for a sweet or savoury snack, a morning boost or an evening reward, Graze has everyone covered, she says.

Graze is also investing in making healthy snacks famous, launching its first-ever TV ad as part of a £5m campaign and reaching 60% of the UK's 35- to 54-year-olds. That was just the beginning of the brand's TV debut, as it has even bigger plans in 2022.

Source

¹ Kantar Brand Health Tracking

2021 – spontaneous

awareness of healthy snacks

² Attest, July 2021

³ Millward Brown, 2020

⁴ Propel, 2020

⁵ graze health survey, 2021

⁶ Nielsen, Snacking Nuts & Cereal Bars: Graze Grocery Multis, w/e 11.09.21/Nielsen, On the Go Healthy Snacking, Total Market, w/e 14.08.21

Certified



Corporation

less
sugar for
sweeter
sales

that's a
graze idea



the UK's no.1
healthy snacking
brand is back on TV²



£5M
media
support
in 2021

¹go to graze.com/nutrition. ²Kantar Brand Health Tracking 2021 – spontaneous awareness of healthy snacks.

Grenade

Biting into protein bar sales

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KEY BRANDS

Carb Killa
Grenade Energy

Recently acquired by global snacking leaders Mondelez International, sports nutrition brand Grenade continues to outperform the market. This has been led by sales of its high-protein, low-sugar Carb Killa protein bar range, which continues to outsell the nearest competition by more than three times and accounts for the largest share of the market at 44%¹, reveals managing director Phil Greenhalgh (pictured below).

“Year-on-year, while the total protein bar market has grown by 12%, Grenade’s Carb Killa sales have risen by 19%², outperforming the market,” he says. “This phenomenal growth is evidence of strong consumer demand for the brand, and the public’s continued focus on leading healthier lifestyles in the wake of the pandemic.”

Driving category growth

With eight of the top 10 performing bars for value sales and cash rate of sale³, Carb Killa is overwhelmingly responsible for driving growth in the category, rendering the brand a must-stock for retailers, notes Greenhalgh. “This has been buoyed by sales of Grenade’s best-selling Carb Killa flavour, Chocolate Chip Salted Caramel, currently the number one protein bar in the market for value sales and cash rate of sale⁴,” he adds.

“Grenade owes its success to its focus on the key category drivers of health, taste and innovation, with taste being particularly key,” explains Greenhalgh. “If a product maxes out on functional benefits but neglects taste in any way, it won’t be considered by consumers, and it won’t sell. Marketed as a healthier alternative to traditional confectionery, 50% of



“Grenade owes its success to its focus on the key category drivers of health, taste and innovation, with taste being particularly key”

shoppers who purchase Carb Killa for the first time becoming frequent purchasers of the brand⁵ – a key driver that ensures profitability for retailers.”

Disruptive marketing

Also pivotal to Grenade’s success has been its focus on disruptive, humour-based marketing, says Greenhalgh. “Within this, ‘always on’ influencer and partnership activity is a cornerstone for the brand, building genuine relationships with everyone from fitness professionals and elite athletes to foodie creators and online personalities; it’s this that has helped Grenade to establish its core product lines, introducing the brand to wider audiences.”

Grenade also innovates with regular tweaks to existing lines, continually launching NPD to “surprise and delight” customers, he adds. Notably, in September, the brand launched an exciting seasonal Carb Killa flavour, Gingerbread.

Source

¹ IRI Marketplace, Total UK Market, Value Sales, 52 w/e 08.08.21

² IRI Marketplace Total UK Market, EValue Sales Protein Bars Total Grenade YTD 09.08.20 & YTD 08.08.21

³ IRI Marketplace, Total UK Market, Value/Store/wk, 12 w/e 08.08.21

⁴ IRI Marketplace, Total UK Market, Value/Store/wk, 52 w/e 08.08.21

⁵ Market Measures, Online Consumer Survey, July 2020



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PROTEIN BAR BRAND^[1]



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MORE PROTEIN. MORE PROFIT.

DRIVING MORE CASH THROUGH THE TILL THAN LEADING CHOCOLATE BARS^[2]

[1] IRI Marketplace Total UK Market Value Sales Protein Bars Carb Killa Category Brand Level 156 weeks to 11/07/2021

[2] IRI 12w/e data to 21.03.21. Convenience Channel. EROS. Grenade Carb Killa vs. Chocolate Confectionery

Indie Bay Snacks

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KEY BRANDS

Indie Bay Snacks

“2021 has been a huge year for us here at Indie Bay,” says founder and CEO Dafna Bonas. “With the launch of our ground-breaking Pretzel Thins, the stage was set to capitalise on consumer trends and healthier habits.”

“We continue to lead with first-of-their-kind innovative, clean-label, vegan-friendly flavours that snackers can’t resist. With 100% more protein and 70% less fat than crisps, our Thins deliver what families want.”

The special ingredient that makes all Indie Bay’s health claims possible is the spelt it uses in its dough. “We’ll use a 1-2 punch of digital and physical media to show snackers that spelt has it all: more flavour, more protein and fibre and, perhaps most importantly, more easily digested gluten molecules. Watch out for new formats and flavours, driven by what store buyers need to satisfy smart consumers looking for more.”

Indie Bay’s newest national partner is Morrisons, launching just in time



“Our strong on-pack health claims and competitive on-shelf pricing will be a potent mix”

for back-to-school across its full estate. “Our beautiful, bright branding helps us stand out on-shelf, encouraging consumers to switch to smarter snacking,” says Bonas. “Research shows consumers will pay more for healthier products, so our strong, on-pack health claims and competitive on-shelf pricing will be a potent mix we think consumers will appreciate.”

INDIE BAY • SNACKS •

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VEGAN



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Morrisons
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Perkier Foods



Perkier enjoys healthy growth

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& Co-Founder

KEY BRANDS

Perkier

Perkier, an independent British company, is the UK's fastest-growing healthy snack bar, selling one bar every ten seconds, says managing director Ann Perkins. "We're on a mission to make the healthiest snacks on the planet," she adds. "Our range has non-HFSS recipes and up to 60% less sugar, 34% more protein and 100% more fibre than our competitors. We provide leading-edge innovation, with vitamin-packed bars for immunity, probiotics for a happy healthy gut, and nutritious energy to avoid the afternoon slumps.

"First to market, we launched our Immunity NPD in six months from concept to market, in 500+ Sainsbury's stores and every Morrisons supermarket." As a result, Perkins is now a finalist in the 2021 Great British Entrepreneur awards for food & drink.

"Beyond health, every snack we make tastes good, does you good and doesn't mess up the planet," she notes. "On taste, our recipes include Salted Caramel and Madagascan Vanilla with a thick layer of Belgian Dark Chocolate.

"We're 100% plant-based and use recyclable packaging. Also, 100% palm oil-free, we partner with International Animal Rescue to drive awareness of the devastating impact of palm oil on orangutans, which will be extinct in less than 25 years if we don't act fast."

After a successful funding round, Perkier's growth is accelerating as it lists with new customers, executes bespoke retailer marketing and increases consumer marketing, she says.

PERKIER

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PROTEIN



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SAVE THE ORANGUTANS



Interested? Contact us for more info
ann@perkier.co.uk

*Source Nielsen, 52w/e 5th June 2021; Premium snacking brands inc. Nakd, Graze, Kind, Trek and Eat Natural Bars.

KIND Snacks

Getting the nation moving

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Head of Category

KEY BRANDS

KIND

↙ This year has been a busy one at Kind, with new NPD launches, charity partnerships and in-store activations, says head of category Stuart Ball. “Also, who can forget learning to adapt both in and out of lockdown?” he adds. “It certainly has been interesting.”

One of the company’s standout moments of 2021 was launching its first exclusive flavour here in the UK, Kind Dark Chocolate Orange Almond, he reveals. “Not only are we obsessed with how good it tastes... but also, it’s been our strongest-performing singles NPD to date.

“Due to its success, we’ve just extended this singles launch into multipacks and we’re confident to see it perform well in the main aisle in grocery.”

Gearing up for 2022

Kind has some exciting NPD in the pipeline for 2022, as well, in and among its jam-packed brand plans.

“The new year is such a pivotal time for healthy snacking, so we’re gearing up to a big first quarter with our campaign move for Kind, whereby we want to encourage the nation to get moving, in any way they can,” says Ball. “We’ll be making sure we make a splash both in-store through impactful point-of-sale (POS), eye-catching media and through our brand platform with a heavy emphasis on partnerships, influencers and brand activation. So, watch this space!”

Transparency with shoppers

As always, it is important that when shoppers see the company’s brand



“The new year is such a pivotal time for healthy snacking, so we’re gearing up to a big first quarter with our campaign move for Kind, whereby we want to encourage the nation to get moving in any way they can”

on-shelf, they know what Kind stands for, adds Ball. “We make sure to showcase our bar and its ingredients, so that we are transparent with shoppers. We shout about Kind’s No.1 ingredient on every pack as it is always nutrient-dense.

“We also think there’s a key place for on-shelf activation, so we often use things like shelf talkers and aisle fins to communicate Kind’s unique benefits to our shoppers.”

Building a kinder world

Everything the company does is in aid of building a kinder world, whether that be through communities, the planet or eating more nutritionally dense food, explains Ball. “This is what sets us apart from other brands. These themes come through everything we do at Kind.

“We can’t wait to bring our consumers on this journey with us into 2022.”

stock up now on the UK's #1 snack bar singles brand*

new

KIND breakfast
almond butter



*Nielsen, UK total market snack bars value sales MAT to 22.05.21

12g plant
protein

have you seen us around?

we're on TV for the first time!

£2M

media spend

16

weeks on air

now is the time to stock up on KIND as your shoppers will see us on the TV.

we've created a podcast with Katie Piper



check out our new podcast, KIDS LIVE KIND as host Katie Piper asks the experts - kids - to teach us how we can all be more kind. scan the QR code to listen to the podcast and watch the TV advert



KP Snacks

Masters of snacking trends

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McCoy's
KP Nuts
Butterkist
popchips
Tyrrells
Skips
Pom-Bear
Penn State
Nik Naks
Wheat Crunchies
Space Raiders
Discos
Frisps
Roysters

➡ Crisps, snacks & nuts (CSN) is a fast-growing, priority category of huge scale, worth £3.4bn and growing at 3.3% YOY¹.

"We're seeing dynamic change across the category as a result of pandemic-related shifting shopper patterns," says KP Snacks group sales director Andy Riddle. "KP Snacks has one of the broadest CSN portfolios, traversing all category-driving trends including 'together time', 'mealtime magic' and 'positive picks'," he notes. "It has delivered 48% of category growth in the last five years², making KP Snacks the No.1 contributor to CSN growth during that period. The primary CSN category driver is taste, and we are in the business of making great-tasting snacks, across all snacking segments."

Together time

Understandably, consumers spent more time at home this year, fuelling an increased desire to make at-home occasions feel more special. The sharing segment is the largest in CSN, worth £1.3bn and growing by 6.7% MAT³.

"There is a high demand for premium lines, with 46% of shoppers more inclined to trade up when dining at home as they look to replicate night-out experiences," says Riddle. "Tyrrells Hand Cooked Crisps (up 10.2%⁴) has been supported by a £4.5m marketing investment this last year. Popcorn sharing occasions are also growing by 21%⁵ and Butterkist, the nation's favourite popcorn brand, enjoys a 37.1%⁶ market share."

Positive picks

With the introduction of new high-fat, -salt & -sugar (HFSS) restrictions next year, healthy snacking is set to



“We’re seeing dynamic change across the category as a result of pandemic-related shifting shopper patterns”

grow exponentially. “popchips is a beacon brand in this sector,” adds Riddle “Worth £33.6m RSV, popchips’ value growth is 16% YTD, contributing £2.8m⁷ and generating 57% of growth in healthy snacking YTD. At under 100 calories per serving, suitable for vegetarians, and with a third less fat than the market leader, popchips provides a more permissible snack without compromising on big flavour.

“Exempt from HFSS restrictions, nuts represent a huge opportunity,” he points out. “Naturally packed with protein and fibre, and appealing on both taste and health cues, KP Nuts is the No.1 brand in nuts, more than six times bigger than the nearest branded competitor⁸ and increasing 13.9% (to £81.5m RSV)⁹.”

Mealtime magic

With food-to-go a long-term, resilient growth trend, the category is insulated for recovery. “We have seen a visible come-back and expect the market to continue to rebound,” says Riddle.

“McCoy’s is the UK’s No.1 ridged crisp¹⁰, with Salt & Vinegar and Flame Grilled Steak the No.1 and No.2 best-selling meal deal choices. Our newest line, McCoy’s Fire Pit, has achieved sales of £3.7m since launch¹⁰. The brand features three sizzling flavours: Flame Roasted Peri Peri, Flame Smoked Chorizo, and Flame Scorched BBQ Rib.”



Source

- ¹ Nielsen Scantrack, 17.07.21
² AC Nielsen, 2015 to 2020
^{3,4} Nielsen Scantrack, 17.07.21
⁵ Kantar 2020
^{6,7} Nielsen Scantrack, 17.07.21
⁸ HIM 2018
^{9,10} Nielsen Scantrack, 17.07.2021

KP SNACKS BEST SELLING BRANDS

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SNACKPARTNERS

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Unlocking functional snacks

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KEY BRANDS

Peperami Snack Boxes
Peperami Chicken Bites
Peperami Jerky
Peperami Salami Sticks
Peperami Vegerami
Chick'nless Bites

Jack Link's Beef Jerky
– Original
– Sweet & Hot
– Teriyaki
Jack Link's Original Biltong
Jack Link's Beef Bars

“Functional snacks are clearly becoming a popular area of innovation for many brands, as consumers look to gain health benefits and on-the-go functionality from their snacks,” notes Laura Trivulzio, EMEA marketing director at Jack Link's. “In particular, high-protein snacks have seen high demand from consumers looking for a natural energy boost.”

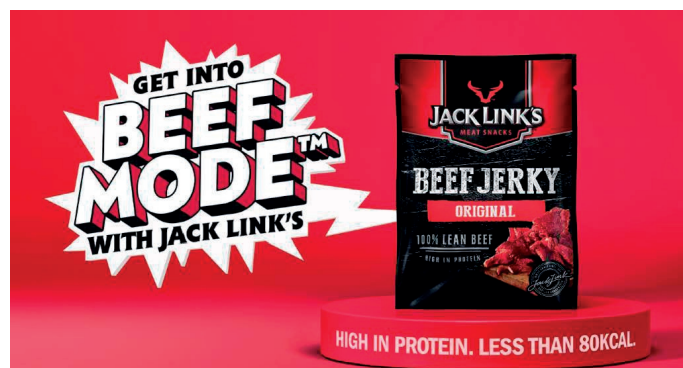
As a result, the meat snacking category has grown significantly, up 26% on last year, with one in four UK households purchasing a meat snack every year¹. Peperami has continued to grow in double digits, remaining the leading chilled meat snack brand in the UK².

“From the brand's iconic salami sticks, with just 112 calories, to its Chicken Bites range made with 100% chicken breast and containing just 103 calories per 50g bag, market growth has been driven by Peperami's range of better-for-you products,” she says.

“Jack Link's Jerky is also perfectly positioned to meet this consumer demand, as the full range is made with 100% beef, high in protein and all under 80 calories per serving,” she notes. “As the biggest and fastest-growing jerky and biltong brand in the UK³, it offers a range of savoury snacks to help power them through the afternoon.” The portfolio is made up of its 100% lean Beef Jerky in three flavours, including Original, Sweet & Hot and Teriyaki, and its Original Biltong and Beef bars.

“Consumers are also looking for more plant-based options within the snacks category, and Peperami has recently announced its move into the meat-free sector, launching its new 40g Vegerami Chick'nless Bites in Pep'd Up and Smokin' flavours made from pea protein,” reveals Trivulzio. “The new range targets flexitarians and vegetarians alike, offering a great-tasting meat-free snack that appeals to both young adults and families.”

To drive further category sales and awareness, Peperami and Jack Link's are continuing to invest in multimedia campaigns that highlight the benefits of protein-rich, better-for-



“Consumers are looking to high-protein snacks to give them a natural energy boost”

you snacks this year. In recent weeks, Peperami launched its latest integrated seven-figure campaign ‘Ban the Bland’, with three celebrities – Rio Ferdinand, Joe Swash and Olly Murs – taking part in an exciting food-based challenge that aims to right British snacking wrongs. “The campaign aims to highlight the versatility and flavour credentials of the range, being the perfect on-the-go snack or protein boost for speedy mealtimes,” explains Trivulzio.

Meanwhile, as part of its plan to attract a broader audience, Jack Link's has launched a new campaign, dubbed ‘Beef Mode’, which is landing across different touchpoints, designed to target young urbans who are discerning snackers and food-lovers, looking for a tasty and empowering snack. ‘Beef Mode’ is a state of mind where everything is possible and Jack Link's range is full of protein and low in calories – the ticket to unlocking this attitude.

Source

¹ Nielsen, 19.06.21

² Nielsen, 17.07.21

³ Nielsen, 19.06.21



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BIGGEST
JERKY BRAND¹**

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MARKETING
INVESTMENT²**

**UK'S
PREFERRED
BEEF JERKY³**

*PER PORTION. 1. NIELSEN VALUE SALES YTD 27.02.2021. 2. MARKETING INVESTMENT OVER 3 YEARS. 3. HAYSTACK PREFERENCE TESTING, APRIL 2018 & AUGUST 2019

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Mikado
Toblerone
Oreo
Ritz
Barry
Dairylea
Philadelphia

➡ The pandemic has led to many changes in shopper behaviour but snacking remains a key opportunity for retailers, with 9 in 10 adults saying they are snacking more or the same vs pre-pandemic¹. Mondelez says its mission is to deliver the right snack, for the right moment, made in the right way. “We call this Snacking Made Right,” says trade communications manager Susan Nash. “Within this, we’ve identified five key focus areas that are shaping the future of snacking.”

Wellbeing

Many consumers are placing an even higher focus on their wellbeing – be it physical or emotional. In fact, 25%² of shoppers are more influenced by health when grocery shopping than pre-pandemic. “We’ve responded to this through innovation such as Cadbury Nuttier, bringing shoppers a more permissible treat with whole fruit and nuts and a hint of indulgence,” says Nash. “Elsewhere, belVita moved into the adult healthier³ snack bar segment this year with new belVita Baked Bars.

Sustainability

Shoppers are now more conscious of where things come from and the packaging they come in. In fact, 90% of consumers are equally or more concerned about environmental issues since the pandemic⁴. “Mondelez has made some big commitments, such as setting an ambitious target of 100% recyclable packaging and 100% sustainable cocoa-sourcing globally for chocolate by 2025,” adds Nash. “Most recently, we announced a move to recyclable packaging for Philadelphia and Dairylea as part of our ‘Pack Light and Pack Right’ strategy.



Source

¹ MDLZ, State of Snacking report, 2020

² IGD Research, 21/22, 02, 21. Base: 2,001 British shoppers

³ As defined by Nielsen

⁴ Sustainability Matters Now More Than Ever for Consumer Companies (bcg.com)

⁵ IGD Shopper Vista, May 2021



“Snacking remains a key opportunity for retailers, with 9 in 10 adults¹ saying they are snacking more or the same compared to pre-pandemic”

Value

Good value for money is as crucial as it has always been for shoppers, but premiumisation also remains key for those looking to treat themselves. Shoppers are again focusing on spending more on quality snacks versus price⁵. “Premium chocolate brand Green & Black’s has seen a packaging refresh across its Organic tablets to encourage shopper trade-up,” reveals Nash. “This also showcases a category-first Chocolate Intensity Scale on-pack.

Occasions

In-home consumption occasions became more important than on-the-go during lockdown. With restrictions now eased, on-the-go is returning but sharing formats are still in demand to meet the more permanent changes in shopper behaviour. “Confectionery and snacking are key to the ‘big night in’, so retailers should include innovations like Caramilk – a new golden blend of smooth white chocolate from Cadbury – in their range,” she says,

Connections

Connections and special moments are really important, as consumers look to make up for cancelled celebrations over the past 18 months. “Snacking plays a vital role at these times, especially for festive sales,” says Nash. “Our returning favourites and new treats for Christmas include the retro icon Cadbury Puds to excite consumers and drive seasonal sales.”

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NO.1 HEALTHIER BISCUIT SKU*



MADE WITH OATS

Tasty Snacks, Trusted Brands

Mondelez International

SNACKING MADE RIGHT

*Nielsen, Sales value, total coverage MAT, 17.04.21. Healthier as defined by Nielsen

**Magnesium contributes to normal energy - yielding metabolism

Nature's Heart

Nutritious, healthy snacking

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KEY BRANDS

**Immune System
fruit & nut mixes:**

- Cashew, Goji & Chocolate Goldenberry
- Mango, Cashew & Chocolate Banana
- Blueberry, Goji & Almond

Snack bars:

- Cashew, Blueberry & Dark Chocolate Protein Bar
- Almond, Peanut & Double Choc Protein Bar
- Dark Chocolate & Sea Salt Nut Bar
- Pecan, Banana & Dark Chocolate Nut Bar
- Chocolate-covered fruits
- Dark Chocolate Goldenberries
- Dark Chocolate Bananas

 Nature's Heart, a South American plant-based brand, specialises in healthy snacking and superfoods. Launched in the UK in 2012, the portfolio features a tasty range of products, packed full of nuts, fruits, dark chocolate and seeds, which are a natural source of protein, fibre, vitamins and minerals.

This year, the brand launched its Immune System range in response to people prioritising their health. This line of three fruit and nut mixes, including ingredients such as cashew, goji and chocolate goldenberry, comes in 100g resealable bags. "It only uses high-quality, great-tasting ingredients, which contribute to the normal function of the immune system," says Tom Benton, general manager UK.

"The response to these products has been great so far. Since the range became widely available in Sainsbury's and other outlets in July 2021, they've brought an incremental 49% of shoppers into the healthy snacking category¹.

"With many consumers returning to active, on-the-go routines and juggling the work/life balance in the 'new normal', Nature's Heart is introducing a new range of nut and plant protein bars, the perfect snack to keep people feeling full of energy throughout the day," he adds. "The bars come in four flavour combinations – cashew, blueberry & dark chocolate; almond, peanut & double chocolate; almond, dark chocolate & sea salt; and pecan, banana & dark chocolate. They are rich in nutrients, offer a great taste, and the ingredients in these snacks are certified by the Rainforest Alliance."

Suitable for vegetarians, gluten-free and containing no artificial colours,



“With many consumers returning to active, on-the-go routines and juggling the work/life balance in the new normal, Nature's Heart is introducing a new range of nut and plant protein bars, rich in nutrients”

flavours, preservatives, or sweeteners, the 45g protein bars contain 10g of plant protein sourced from pea and nut and do not include any soya or whey protein.

"Nature's Heart is also a brand committed to care, supporting local communities," explains Benton. "Whether that's cacao certified by the Rainforest Alliance, investing in The Goldenberry Plan to improve the livelihoods of thousands of local farmers in South America, or supporting food banks through their partnership here in the UK with FareShare.

"Looking ahead, high-fat, -salt & -sugar (HFSS) will be a key driver of the category," he notes. "Nature's Heart already has non-HFSS products within the range, such as the Blueberry, Goji and Almond Immune System mix, with more products in the pipeline. In 2022, it will launch a new non-HFSS vegan range with on-trend flavours and ingredients to help consumers snack in a truly nutritious and healthy way."

Source

¹ Nature's Heart internal sales data



WE GROW SALES.

(and some of the tastiest Goldenberries)



49% of shoppers are incremental to the category*
+£2m investment for Nature's Heart

*Retailer data 6 weeks to 21st August'



Nestlé UK

Chance for a sunshine break

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KEY BRANDS

Milkybar
Aero
Munchies
Smarties
Rowntree's

For the UK population, having had a sustained period of time where lockdown has restricted family and friends from getting together, the desire to spend time together is now greater than ever. The 'Big Night In' occasion is therefore important and food plays a key role within it.

Confectionery is often central to a Big Night In and formats such as bags and blocks are ideal for this occasion, perfect for dipping into and sharing with friends and family, says Nestlé.

This autumn much-loved Nestlé confectionery brands are adding even more excitement to the 'Big Night In' occasion by giving shoppers the chance to go from sofa to sunshine with a brand-new 'Win a Sunshine Break' on-pack promotion across its range of sharing bags and blocks.

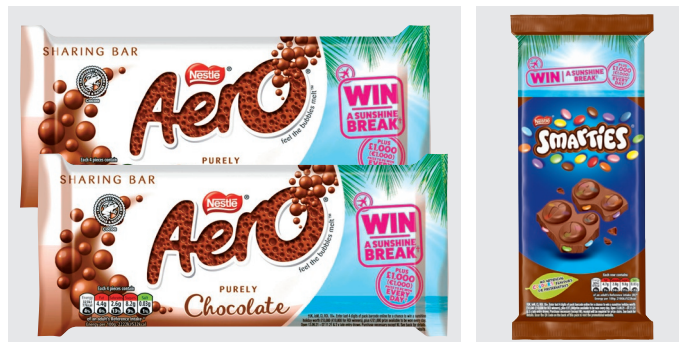
Five top prizes of a holiday worth £10,000 are up for grabs, plus a further prize of £1,000 to be won every day during the promotional period. With holidays off-limits during the Covid-19 pandemic, the chance to win a sunshine break is expected to appeal to many shoppers. The 'win now, book later' prizes also ensure winners are able to book their holidays while following government travel guidelines.

The promotion features across the sharing formats of some of Nestlé's biggest brands, including Milkybar, Aero, Munchies, Smarties and Rowntree's. Stock of promotional packs will be available from 23 August, with the promotion live from 13 September to 7 November. 'Win a Sunshine Break' will also benefit from a media campaign aimed at driving shoppers into stores, which will centre around out-of-home poster advertising and social media. This media is expected to be seen 42 million times.

Sharing formats have grown in popularity in recent months, and in particular across 2020, as shoppers made fewer shopping trips but bought bigger baskets. Sharing bags appeared in an additional 30 million baskets in 2020, while chocolate blocks appeared in an additional 81 million baskets with an additional 1.5 million new shoppers buying into the format¹.

Source

¹ Kantar Worldpanel, Take Home Confectionery, 52 w/e 27.12.20.



“We expect ‘Big Night In’ occasions to continue to be popular as people make up for lost time, getting together with family and friends”

“We expect ‘Big Night In’ occasions to continue to be popular as people make up for lost time getting together with family and friends – and sharing confectionery, such as bags and blocks, plays a key role in these occasions,” says Helen Bailor, shopper marketing manager, Nestlé Confectionery. “Add this together with the chance to win a long-awaited holiday, and our ‘Win a Sunshine Break’ promotion is sure to capture shoppers’ attention and boost sales of these formats in-store.”

Also, retailers can continue to capitalise on sales of sharing bags and blocks by cross-merchandising social sharing categories together – such as sharing bags, chocolate blocks, sharing crisps, beers, wine and spirits (BWS) – and highlighting occasions through point-of-sale (POS), which focuses on the Big Night In and offers shoppers a complete sharing solution. This could also be centred around key calendar occasions such as sporting events.

WIN A SUNSHINE BREAK[†]

PLUS
£1,000
(€1,000)
PRIZE TO BE WON
EVERY
DAY[†]

CONSUMER PROMOTION



GIVE YOUR SHOPPERS A CHANCE TO WIN

PRIZE CLAIMANTS MUST FOLLOW GOVERNMENT TRAVEL GUIDELINES.

For illustrative purposes only.

[†]UK, IoM, CI, ROI. 18+. Enter last 4 digits of pack barcode online for a chance to win a sunshine holiday worth £10,000 (£10,000 for ROI winners), plus £/€1,000 prize available to be won every day. Open 13.09.21 – 07.11.21. Purchase necessary (except NI), receipt will be required for prize claim. Max. 2 entries/person/day during the promotional period. Max. 1x prize type/person and max. 1x prize type/household. Full T&Cs at www.nestle-promotions.co.uk/sofatosunshine

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PepsiCo

Snacking without compromise

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KEY BRANDS

Walkers MAX
Walkers Sensations
Walkers Oven Baked
Walkers
Wotsits Giants
Wotsits
Doritos
Doritos Stax
Off the Eaten Path
Pipers
Snack A Jacks

There have been huge shifts in consumers' shopping and eating habits as a direct result of the Covid-19 pandemic. However, snacking behaviours will continue to be a big part of daily lives, says PepsiCo. In fact, on average, UK consumers have more than five snacks a day¹, amounting to around 350 million daily snacking occasions² – more than 70% of which are packaged snacks³.

In terms of daypart, lunch is still the single biggest savoury snacking occasion⁴, and this is being accelerated both in- and out-of-the home⁵. As people emerge from the pandemic and consumers return to snacking while out and about, it will be important for retailers to offer the right range of products in the right formats.

Fernando Kahane, marketing director for Walkers Snacks at PepsiCo, comments: "The data shows snacking remains incredibly important to shoppers, but macro trends are influencing what they consider when buying into the savoury snacks category. High up on the agenda is health and wellbeing, as consumers are more mindful of their diet and health. The challenge for suppliers and retailers is to offer choice through a balanced range to meet different shopper needs."

Taste is key

Taste and satiety are the two biggest needs in snacking⁶, so some of the most successful innovations last year were taste-led. For example, our new Quavers Retro, Monster Munch Giants and Walkers Max KFC launches have put taste at the forefront.

Kahane continues: "Despite shoppers' growing mindfulness when it comes to their health, they are unwilling to compromise on taste. Savoury snacks, in particular, are growing⁷ and well-positioned to thrive amid HFSS regulations. We will continue to offer a balanced portfolio of crisps and snacks that don't compromise on taste, as well as portion-controlled alternatives.

"With more regulations on how we advertise to consumers we believe our range of non-HFSS offerings, portion-



“Walkers is the nation's favourite crisp brand¹⁰, and Doritos is the UK's number one tortilla chip brand¹¹”

controlled snacks and consumer-centric campaigns will continue to drive category growth across our total portfolio by connecting with shoppers in- and out-of-store.”

Health and enjoyment

There is a perceived tension between health and enjoyment when it comes to snacking, with consumers wanting to treat themselves as part of a healthier, more balanced diet. Enjoyment is the primary driver of around 70% of snacking occasions⁸, particularly in the evening as consumers seek moments of comfort and indulgence. Health is the primary driver for the remainder of snacking occasions⁹, and plays a key role in daytime and social events.

"It is clear that retailers need to offer the right selection of products to satisfy these two needs," Kahane continues. "At PepsiCo, our varied portfolio includes some of the UK's favourite snacks that are also portion-controlled under 100 calories per pack, demonstrating our continued commitment to offer consumers those healthier options alongside great taste.

"We believe both new technology and ingredients can play a key role in this mission, to give customers the snacks they love without compromise."



Source

¹⁻²⁺³ PepsiCo UK, Shape of Snacking Study (May '20-Feb '21: 25,000 consumers aged 2+, Total Snacking – all categories, 150,000+ snacking occasions)

⁴⁺⁵ Kantar, Usage Panel, In Home & Carried Out, 12 w/e 08.08.21

⁶⁺⁸⁺⁹ PepsiCo UK, Shape of Snacking Study (May '20-Feb '21: 25,000 consumers aged 2+, Total Snacking – all categories, 150,000+ snacking occasions)

⁷ Nielsen, Savoury Snacks, Total Coverage, MAT growth is +3.2% despite strong growth YA of +3.8% MAT to 28.08.21; 2020 vs 2019 growth was +5.0%

¹⁰ Nielsen, Total Savoury Database, Value Sales, MAT to 21.08.21, Walkers has largest brand share of all brands within potato chips (29.8%)

¹¹ Nielsen, Total Savoury Database, Value Sales, MAT to 21.08.21

1000 CALORIES OR LESS **PER PACK**



100
CALORIES
OR LESS
RANGE

Soreen

Taste, enjoyment and health

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KEY BRANDS

Soreen

➡ Taste and enjoyment remain the number one priority for consumers when it comes to convenient snacking. However, health is also a key driver, particularly the holistic view of long-term well-being benefits.

Liz Jacobs, head of marketing at Soreen, notes: "Soreen perfectly fits the changing demands of consumers, in that it delivers an enjoyable treat-like taste while also providing a source of fibre and energy. As for reducing sugar and fat intake, our Malt and Banana Loaf Bars are compliant with the new HFSS regulations, making Soreen a guilt-free choice for consumers, too."

Earlier this year, Soreen launched its biggest ever plant-based range. All its products, excluding its pre-buttered slices, can now be enjoyed as part of a dairy-free, vegan or plant-based diet.

"Our vegan-friendly Loaf Bars come in three deliciously squidgy flavours – Chocolate, Banana and Malt – enabling shoppers to grab a healthy choice fast at



“Soreen delivers an enjoyable taste while providing a source of fibre and energy”

a reasonable cost. For people returning to the office, staying at home, or in need of an energy boost, our Loaf Bars are a tasty, affordable snack,” she adds.

Soreen also launched its new Fruit & Veg-Mmms range this year, in Orange & Rainbow Carrot and Berry & Beetroot flavours. High in fruit and veg, these are popular with parents of pre-school children, for whom health is a priority.

30% LESS SUGAR THAN THE AVERAGE CEREAL BAR*



Malt



Banana



Source
of
fibre

Non-HFSS
Products**

Low in
saturated
fat



*To compare our nutritional values visit www.soreen.com/nutritionals

**To help improve people's diets the government will restrict the promotion of foods that are high in fat, sugar and salt (HFSS) by location and volume price from October 2022. The HFSS nutrient profile model is available at: www.gov.uk/government/publications/the-nutrient-profiling-model

Tyson Foods

Protein snack that packs a punch

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KEY BRANDS

GRAB IT

Source

¹ The Grocer, November 2020, Protein perceptions, savoury preferences and flavour seekers: 10 charts explaining UK attitudes to meat snacks: <https://tinyurl.com/zrn6tucx>
² Food Navigator, May 2020, Is coronavirus changing how we eat?: <https://tinyurl.com/z2mpss4t>

A 2020 survey by The Grocer and Harris Interactive¹ shows how Covid-19 has prompted GB consumers to consider healthier, low-in-sugar snacks.

According to recent data by FMCG Gurus², 72% of European shoppers said their Covid-19 experience has made them want to make “greater attempts” to eat and drink more healthily in the future. And, when it comes to deciding what snacks to enjoy as part of a healthy and balanced diet, 36% of adults¹ in the Harris Interactive survey said they choose to buy meat snacks at least once a week when hunger strikes – with chicken bites their top low-in-fat choice.

So, how about a protein-packed snack that will grab consumers’ attention?

Introducing Grab It

As demand for nutritious, high-in-protein snacks continues to rise¹ and products containing lean chicken meat grow in popularity¹, Grab It is the perfect snack option for consumers



“Covid-19 has prompted GB consumers to consider healthier, low-in-sugar snacks”

right now, says Tyson Foods.

“Containing high-quality 100% chicken breast fillet, this relaunched brand has used exciting new recipes to create products that are bursting with flavour – for a delicious snack that really packs a punch while containing at least 10g of protein and less than 68 calories.

“Help give your store a healthy sales boost by visiting go-grabit.co.uk.”

THE PERFECT
HIGH PROTEIN
LOW FAT
DELICIOUS
CHICKEN
SNACK

STOCK UP NOW!

VISIT GO-GRABIT.CO.UK

LOW FAT

HIGH PROTEIN



Grab It

GIVE YOUR STORE A HEALTHY SALES BOOST

f GRABITSNACKING @ GRABITSNACKING t GRABITSNACKING in GRABIT

Simply Roasted

Simply the best crisps

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KEY BRANDS

Simply Roasted
– Sea Salt
– Mature Cheddar & Red Onion
– Sea Salt & Cider Vinegar
– Black Truffle

Simply Roasted is the result of a £20m investment and 10 years of hard work and innovation, culminating in the creation of a patented multi-step preparation and cooking system that is completely new to the market, explains the company.

This has resulted in skin-on crisps that are as similar to a traditional fried crisp as you can get, but with 50% less fat, lower salt and under 100 calories per serving. “Innovation with moreish and on-trend, premium flavours will be a primary focus within our NPD,” says marketing director Ruth Fittock.

“Design is a fundamental part of our brand and on-shelf strategy. We’re so proud of our packaging, it’s bold, distinctive and modern. The colour palette is bright and playful and challenges the category conventions. We think it delivers great stand-out on shelf and importantly, online too.”

A major focus for Simply Roasted is sampling, which it believes will be fundamental in driving initial awareness and reach, reveals Fittock. “Given that 76% of consumers want to come and sample a product if it’s new*, it’s a must-do,” she says. “We know that consumers are looking for options that are ‘better for you’ but aren’t willing to compromise on taste, so trial will be really important for us. With our crisps tasting really is believing.

“Another area will be our work with influencers which will be instrumental in building a feedback loop as well as helping us create strong user generated content (UGC) that will help us further drive on-site sales and capture the



“Consumers are looking for options that are ‘better for you’ but aren’t willing to compromise on taste, so trial will be really important for us”

category. We’re also looking forward to a large consumer press launch early 2022 to build national awareness.”

For many people in this country, crisps are a natural part of life from early childhood, it’s a category with a household penetration of 93%*, notes Fittock. “So it’s fair to say crisps really cut across age, race and gender in a way that very few categories do. At the same time, we know there’s an established and growing need for healthier options.

Tasty, HFSS-compliant crisps

“We’re disrupting the category with our crisps, which are the first to truly bridge the gap between indulgent and better-for-you,” she says. “Simply Roasted crisps have everything you want and expect from a traditional fried crisp; crunch, taste satisfaction, but our health claims are among the best in the category – 50% less fat, lower in salt and under 100 calories a serving.

“Ours is the only sliced potato crisp that won’t be affected by HFSS legislation, and we’ve managed to achieve this with no compromise on taste or flavour,” adds Fittock. “This sets us apart from the rest of the category, and will be key to our success with consumers.”



introducing the 20 million pound crisp.



RRP from £1.19 per pack



Scan here to speak
to us about
becoming a stockist

50% less fat than regular fried crisps.
under 99 calories (per portion).
roasted, never fried.
made from real, sliced potatoes.
all natural ingredients.
<0.5g salt per portion.

[@simplyroasted_](https://www.instagram.com/simplyroasted_)
[simplyroastedcrisps.co.uk](https://www.simplyroastedcrisps.co.uk)

Sun Valley

Nuts For... an invitation

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Commercial Director

KEY BRANDS

Sun Valley Nut Co
– Classic peanuts for pubs, bars and hospitality: carded, barpots and speciality ranges
– Delicious snacks to be enjoyed in good company
– Peanut butters
Sun Valley Snack Co
– Well-crafted crisps: hand-cooked, punchy flavours
Nuts for
– Fun nut mixes: bold flavours and interesting inclusions
– Healthier snacks which deliver on taste

Established in 1949, Sun Valley is one of the UK's largest and best-known independent suppliers of peanuts and nut products. The business has recently expanded its portfolio with some innovative new nut mixes under its Nuts For range, it says.

“Savvy online consumers are already raving about the new, distinctively different Nuts For brand, which delivers healthy snack-time satisfaction,” says marketing manager Alison Robson. “Sun Valley is now inviting retailers and wholesalers to stock up and profit from its expanding Nuts For range, which includes a number of new HFSS-compliant snacks in innovative 100% plastic-free packs.”

Here's the thing

Nuts For is a new, fun, nut-snacking brand, targeting younger, high-snacking consumers with healthier snacks that deliver on treat and indulgence.

“Nuts For's disruptive design recalls punk rock's rebel roar,” says Robson. “Its loud and proud look delivers huge shelf stand-out, and the product itself is packed with flavour and personality. The packs shout out the product benefits, such as source of protein, high fibre content plus vegan credentials.”

Breaking news!

In January 2022, Sun Valley will extend Nuts For's best-selling range. The current line-up includes savoury nut snack mixes, sweet mixes that combine fruit, nuts and confectionery, and a lightly chocolate-coated almond snack. These come in single-serve 30-35g bags, RRP £1. “Joining these will be three new products: Protein Pick-up and Berry Boost are vegan, and a source of plant protein and minerals, such as



Source

¹ Kantar, 52 w/e Jan 2020/Dec

27 2020, Nuts +12.9%

² Harris Interactive, survey of 2,111



“Nuts For's disruptive design recalls punk rock's rebel roar. Its loud and proud look delivers huge shelf stand-out and the product is packed with flavour and personality”

copper, which supports immunity.

“Nuts For's second Simply Dip'd option, Honey Cashews and Peanuts will offer the delicious taste of honey-roast nuts with more honey and less sugar than the average. The new SKU will sit alongside a repackaged Simply Dip'd Dark Chocolate Almonds SKU.”

Nuts For's new lines come in 100% plastic-free, compostable packs, and are HFSS-compliant, so retailers can use them to drive impulse purchase next to tills and on aisle ends.

Recent market research confirms why retailers and wholesalers should go ‘Nuts For’ the new snacks:

- 77% of consumers enjoy nut snacks and the market is in growth (+12.9%)¹;
- 86% of 20- to 34-year-olds snack daily and 50% say taste is the deciding factor when choosing a snack².

It's your move

“Nuts For is now recruiting wholesale and retail partners. Contact us and join the nutty revolution,” says Robson.

NUTS FOR...

HEALTHIER PROFITS?

CASH IN ON THE **86%** OF 25-34 YEAR OLDS WHO
SNACK EVERY DAY¹ AND LOOK FOR HEALTH AND FLAVOUR² WITH...



Become a part of the nutty revolution and stock NUTS FOR!

www.nuts-for.com

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[@nutsforsnacks](https://www.instagram.com/nutsforsnacks)

TEL 0151 482 7100

Sources: Harris Interactive survey of 2,111. ¹86% of 25-34 year olds snack at least daily, and 21% snack as often as three times a day. ²50% of 25-34 year olds named taste as the most important factor when choosing a snack.

Tayto Group

Snacking sorted

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KEY BRANDS

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

➡ Tayto Group, the UK's largest family-owned snacks business, says it has 'Snacking Sorted' with Golden Wonder's fully-flavoured crisps and snacks plus the leading pork snack brands – Mr Porky, Midland Snacks and The Real Pork Co. "This unique range provides retailers with a snacking 'one-stop-shop'," it says.

Profit from pork

Pork scratchings are uniquely British, offering exceptional opportunities for incremental sales and strong profits – given they are VAT-free, explains marketing director Matt Smith. "Having been voted Britain's favourite pub snack¹, scratchings are synonymous with the pub, but almost half of purchases are in retail². Pork snacks are growing faster than the market³ as consumers continue to 'take the pub taste home' – a Covid-19 habit that has continued even with pubs now open."

Retailers can maximise sales by tapping into shopper behaviour, he notes. "As over 80% of scratchings are consumed with a drink², smart merchandising can drive sales. Consumers talk about buying scratchings on impulse from the 'offie' – i.e. a convenience store or forecourt – so, hanging pork snacks clipstrips with beer, wine & spirits (BWS) will capture these impulse sales without taking up precious shelf or floor space."

Driving the pork snacks category

As category leaders, Tayto recently delivered the biggest-ever advertising campaign for pork scratchings with the strapline 'There's no matching a scratching', Smith explains, "With national radio coverage and upweighted regional activity across out-of-home, radio and digital, the campaign heroed the unique taste that only a scratching can deliver and featured Mr Porky – the No.1 brand with 43.7% share and growing faster than the market (+6.8% vs 5.5%)⁴."

Midland Snacks, the No.2 brand, has also performed exceptionally in the past year, growing significantly faster than the market (+37.3%)⁴ by offering



“Pork scratchings are synonymous with the pub, but almost half of purchases are in retail. Pork snacks are growing faster than the market³ as consumers continue to 'take the pub taste home'”



a traditional, hand-cooked scratching synonymous with the Great British pub.

Smith concludes, "Taste is everything in snacking and we continue to lead the pork snacks market with the biggest brands – with Great Taste awards across the entire range of Mr Porky and Midland Snacks."

Golden Wonder-ful

Golden Wonder continues to offer great branded value to both consumers and retailers and is launching the new Even More range of £1 PMP crisps with unique, premium flavours – Mature Cheddar & Spring Onion, Chargrilled Steak and Crispy Smoked Bacon. Smith explains: "Since launching our first Cheese & Onion crisps almost 60 years ago, Golden Wonder has been famous for delivering more punch per crunch."

"These latest flavours, exclusively available in £1 PMP packs, are the perfect way to upgrade any sharing occasion. They will sit alongside our other £1 packs, including Spicy Bikers which has become a top 10 seller within months of launch⁵."

"With health becoming increasingly important to consumers, Ringos – Golden Wonder's No.1 snack brand – continues to perform by delivering great taste from 59 calories per pack at a great price."

Smith concludes: "Health and value are important to consumers, but taste remains the number one reason for purchase – snacks have to be worth the calories. Ringos achieves this balance perfectly and we have some exciting products under development that will continue to deliver Golden Wonder's legendary taste while being non-HFSS. Watch this space."

Source

¹ Perspectus Global Poll, March 2021

² Norstat, 4,009 pork snacks occasions, January 2020

³ IRI Market Advantage, IRI All Outlets GB, Pork Snacks and Crisps, Snacks & Popcorn, 52 w/e 21.08.21, Value Sales % Change vs YA, +5.5% vs +2.8%

⁴ IRI Market Advantage, IRI All Outlets GB, Pork Snacks, 52 w/e 21.08.21, Value Sales and Value Sales % Change vs YA

⁵ IRI Market Advantage, Symbols & Independents Scotland, £1 PMP Sharing Snacks, 12 w/e 21.08.21, Avg weekly value per store selling

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No1
Brand*



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and MSG
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NEW



NEW



Family
Favourite



Great
Value



From
59 Cals



99 Cals
Gluten
Free



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BRITISH-MADE & FAMILY-OWNED

Source: *IRI Market Advantage |
IRI All Outlets GB | Pork Snacks |
52 w/e 21-Aug-21 | Value Sales

Valeo Snackfoods

Kettle has Xmas wrapped up

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KETTLE®
Metcalfe's
Manomasa

➡ Kettle Chips, the UK's leading hand-cooked crisp brand¹, is launching a new TV advert, which will run from October to December, to ensure the brand is top of mind at this key time of year, says the company.

In the run-up to Christmas the campaign is designed to prompt a reappraisal of Kettle among new consumers and remind existing shoppers of the reasons why they love the brand, it says. "Significant investment of over £2.5m means an audience of 78% of ABC1 adults will be reached via high-profile slots, including The Great British Bake Off, and will capitalise on shoppers' desire to trade up during the festive season."

The TV advertising runs alongside Kettle Chips' year-round sponsorship of ITV's James Martin's Saturday Morning, which reaches a third of UK households and reinforces the brand's premium, foodie credentials.

"Back by popular demand, Kettle sharing bags are again having a festive make-over," it reveals. "Following the success of last year's designs, the eye-catching Christmas packaging is being re-introduced across the core range, including the 'with love from ...' tag on the front, which allows consumers to personalise and gift the bags."

Claire Hooper, Valeo Snackfoods head of brands says: "Consumers consider Kettle Chips as good enough to gift, and this year they have eight flavours to choose from as our new Steakhouse Barbecue seasoning, made with real slow-cooked beef, will also be specially wrapped. The limited-edition packaging creates strong shelf stand-out, especially when displayed as a block, and is bound to encourage impulse purchase."



“Following the success of last year's designs, the eye-catching Christmas packaging is being re-introduced across the core Kettle Chips range”

The other snack brands in Valeo Snackfoods' portfolio are Metcalfe's – tasty popcorn and ricecakes, including a selection of products with under 100 calories, and Manomasa – premium tortilla chips made by UK producer 'It's All Good', which was acquired by Valeo Snackfoods at the end of last year.

Metcalfe's popcorn and ricecakes meet consumer demand for tasty snacks they don't have to feel guilty about, which is brought to life by angel and devil characters on boldly coloured packs to ensure on-shelf stand-out, says Hooper.

Metcalfe's Ricecakes are about to be relaunched with Belgian chocolate and a new Yogurt and Strawberry variant, made with real strawberry pieces, yet they remain under 100 calories per serving, so make it easy for consumers to both enjoy and still feel good about the snacks they're eating, she says.

Manomasa offers a range of premium tortillas in both sharing and single-serve formats, using ingredients from around the world to make unique flavour combinations such as Manchego & Green Olive and Chipotle & Lime. "Every ingredient is chosen with the utmost care to ensure the chips are all unique in flavour, texture and shape," says Hooper. "Latin American food is hugely popular, and consumers love the Manomasa range as demonstrated by the strong sales growth of 36.8% year on year²."

Source

¹ IRI, Total Hand Cooked Crisps Branded Category, Value Sales, Total UK, 52 w/e 08.08.21

² IRI, Value Sales, Total UK, 52 w/e 08.08.21

THE UK'S No.1 HANDCOOKED CRISP BRAND*



FESTIVELY WRAPPED FOR CHRISTMAS



NEW TV CAMPAIGN LIVE OCTOBER

*TRI TOTAL MARKET DATA TO 8/8/21

William Reed

INFORMING BUSINESS GROWTH

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