



# Snacks in the United Kingdom

June 2024

Table of Contents

## Snacks in the United Kingdom

### EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for snacks?

### MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024

Table 2 - Sales of Snacks by Category: Value 2019-2024

Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024

Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Snacks: % Value 2020-2024

Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024

Table 7 - Penetration of Private Label by Category: % Value 2019-2024

Table 8 - Distribution of Snacks by Format: % Value 2019-2024

Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029

Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Chocolate Confectionery in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Persistent inflation and HFSS regulation drive retail volume decline for chocolate confectionery

The need for affordable luxuries mitigates impact of cost-of-living crisis

Competitive landscape remains stable with major players leading

#### PROSPECTS AND OPPORTUNITIES

Growth set to be driven by premiumisation as retail volumes stagnate

New set of restrictions on HFSS for chocolate confectionery scheduled

Investment in cocoa-free and vegan chocolate is set to accelerate

### CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2024

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

## Gum in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Gum continues to recover from impact of the pandemic  
HFSS regulation boosts in-store visibility of sugar-free chewing gum  
Investment in flavour expansion drives growth

#### PROSPECTS AND OPPORTUNITIES

Gum sales are expected to grow as impulse purchases recover  
Innovation of flavours, packaging formats and claims expected to drive future growth  
Plastic-free gum offerings are set to expand their presence

#### CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024  
Table 26 - Sales of Gum by Category: Value 2019-2024  
Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024  
Table 28 - Sales of Gum by Category: % Value Growth 2019-2024  
Table 29 - Sales of Gum by Flavour: Rankings 2019-2024  
Table 30 - NBO Company Shares of Gum: % Value 2020-2024  
Table 31 - LBN Brand Shares of Gum: % Value 2021-2024  
Table 32 - Distribution of Gum by Format: % Value 2019-2024  
Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029  
Table 34 - Forecast Sales of Gum by Category: Value 2024-2029  
Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029  
Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

## Sugar Confectionery in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Inflationary pressures challenge sugar confectionery's retail volume sales  
Sugar confectionery displays mixed performance  
Flavour expansion remains the primary growth driver

#### PROSPECTS AND OPPORTUNITIES

Category set to grow as innovation focus attracts young consumers  
HFSS regulation is set to drive innovation towards healthier variants  
Vegan and clean label variants to expand presence as sustainability and health concerns increase

#### CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024  
Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024  
Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024  
Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024  
Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024  
Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024  
Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024  
Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

## Ice Cream in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Total demand for ice creams drops due to economic and regulatory challenges

The desire for indulgence drives innovation in flavour expansion

“Snackification” trend drives demand for mini formats

#### PROSPECTS AND OPPORTUNITIES

Retail volume sales set to return to growth, yet environment will remain challenging

HFSS regulation is set to accelerate investment in healthier variants

Extended seasonality creates opportunity for new consumption occasions

#### CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

## Savoury Snacks in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Savoury snacks severely hit by supply chain crisis

Manufacturers invest in flavour expansion to bring excitement to savoury snacks

HFSS-compliant products enter savoury snacks

#### PROSPECTS AND OPPORTUNITIES

Per capita consumption underperforms amid rising awareness of healthy nutrition

Flavour expansion remains the main growth engine for savoury snacks

High-protein and high-fibre snacks to outperform overall category

#### CATEGORY DATA

#### Summary 4 - Other Savoury Snacks by Product Type: 2024

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

### Sweet Biscuits, Snack Bars and Fruit Snacks in the United Kingdom

#### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Despite strong inflationary pressures, demand for sweet biscuits, fruit snacks and snack bars remains resilient

The implementation of HFSS regulation challenges impulse purchases

Desire for indulgence and premiumisation influences new product development

#### PROSPECTS AND OPPORTUNITIES

Category to record steady growth as inflationary pressures ease

Focus on healthy nutrition is expected to drive further product launches

Manufacturers to focus on sustainability as category becomes increasingly regulated

#### CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/snacks-in-the-united-kingdom/report](http://www.euromonitor.com/snacks-in-the-united-kingdom/report).