Salty Snacks in the U.S., 3rd Edition

Description: Nearly everybody eats salty snacks. More than 90% of households in the country report using a salty snack in the past 30 days, and very few households limit themselves to only one or two kinds of salty snacks. Two out of three American households routinely use at least three kinds of salty snacks.

Salty Snacks in the U.S. sheds new light on a rapidly evolving market that food marketers increasingly count on to lift their overall profitability. The report shows how the packaged food industry's recent efforts to roll out a wider array of exciting and innovative healthy-ingredient versions of salty snacks can succeed by targeting a critically important subset of healthy snackers.

There are 50 million consumers who often snack between meals and agree that “salted snacks are my favorite snack.” Within the population of these self-professed frequent salty snackers, there is a cadre of 14.2 million “healthy” salty snackers, whose favorite snack is a salty snack and who also claim that they “usually only snack on healthy foods.” These frequent salty snackers exercise often, seek out healthy-ingredient foods of all kinds and do not see a conflict between craving salty snacks and pursuing a healthy snacking diet.

The report highlights some of the most salient trends expected to generate challenges and opportunities for marketers of salty snacks. For example, potatoes and corn, once the rulers of the salty snack world, will continue to face growing competition from snacks made from an ever-growing panoply of vegetables and legumes.

The report demonstrates that salty snacks marketers will need to be agile and fast-moving to be up to the challenges presented by today's generation of salty snackers. For example, it is no longer enough for salty snacks marketers to roll out products with a single flavor, no matter how robust or exotic. Dedicated snackers are seeking out surprises in the form of unexpected combinations of flavors. Moreover, salty snacks marketers will need to be alert to new possibilities for creating innovative products by merging traditional platforms into new snack forms. At the same time, established marketers face intensifying competition from smaller players bent on launching creative and healthy products to meet the needs of today's increasingly health-conscious snackers.

Market Definition

This Packaged Facts report defines the market for salty snacks based upon the following product types: potato chips; tortilla/tostada chips; other salted snacks (not including nuts); pretzels; cheese snacks; corn snacks (not including tortilla chips); ready-to-eat popcorn/caramel corn; and pork rinds. The report also analyzes consumer behavior related to the four categories of salty snacks tracked by Simmons National Consumer Study (NCS): potato chips, popcorn products, corn/tortilla chips/cheese snacks and pretzels.

Contents: Chapter 1: Executive Summary
- Market Definition
- Methodology
- Market Overview
Table 1-1: U.S. Retail Sales of Salty Snacks, 2008-2013 (in million $)
Table 1-2: Projected U.S. Retail Sales of Salty Snacks, 2013-2018 (in million $)
- Insights and Opportunities
Nearly Everybody Eats Salty Snacks
Many Households Eat All Kinds of Salty Snacks
Salty Snacks Morph into Better-for-You Snacks
Folksy Independent Marketers Have Major Impact
- The Competitors
Frito-Lay North America Continues to Dominate
Smaller Marketers and Private Labels Pick Up Steam
Competitive Highlights
Frito-Lay North America Buys Prospects of PepsiCo, Inc.
Utz Quality Foods, Inc. Launches Expansion Program
General Mills, Inc. Bets on Green Giant
- Marketing and Retailing Trends
Seasonal Products and Marketing Programs on the Upswing
7-Eleven Upscales Snack Offerings
Kellogg Company Expands C-Store Merchandising Tools
Private Label Snacks Need Better Merchandising
- Consumer Trends
Who's Eating Large Quantities of Salty Snacks
Popcorn Tops in Popularity among All Demographic Segments
Frequent Salty Snackers Conflicted about Food
Store-Made Meals and Frozen Dinners Popular

Chapter 2: Insights and Opportunities

- Topline Consumer Insights
Nearly Everybody Eats Salty Snacks
Table 2-1: Use of Salty Snacks by Type of Snack, 2013 (in thousands)
Many Households Eat All Kinds of Salty Snacks
Table 2-2: Household Use of Other Salty Snacks by Type of Snack, 2013
Table 2-3: High-Volume Household Use of Salty Snacks by Type of Snack, 2013
77 Million Households Use at Least Three Types of Salty Snacks
Table 2-4: Household Use of Various Combinations of Salty Snacks, 2013 (in thousands)
Pretzels Get No Respect
Table 2-5: Household Use of Various Combinations of Salty Snacks Rank Ordered, 2013 (in thousands)
Serious Salty Snackers Hark Back to a Bygone Middle America
Table 2-6: Distinguishing Characteristics of Consumers Living in Households Using All Four Types of Salty Snacks
Salty Snackers Push Back Against Low-Fat Potato Chips
Table 2-7: Trends in Consumer Preferences for Potato Chips by Type Used Most Often, 2004 vs. 2013 (in thousands)
- Topline Market Trends and Opportunities
Salty Snacks Morph into Better-for-You Snacks
Table 2-8: Excerpts from Websites of Salty Snacks Marketers Promising Healthful Products
Folksy Independent Marketers Have Major Impact
Table 2-9: Trends in Consumer Preferences for Potato Chips by Flavor Used Most Often, 2004 vs. 2013 (in thousands)
Tortilla Chips Move Beyond Tradition
Pretzels Get a Makeover
Pork Rinds Get a Second Look
Store Brands Gain Favor
Table 2-10: Number of Consumers Using Store Brand of Salty Snacks Most Often by Type of Snack, 2004 vs. 2013 (in thousands)
Table 2-11: Total IRI-Tracked Dollar Sales of Private Label Salty Snacks by Market Segment (in thousand $)
Permission to Indulge
Wild Flavor Combinations
Gluten Be Gone
Popped Snacks
Single Servings
Regional Preferences
An Authentic and Artisanal Image
More Veggies, Please
New Flavor and Ingredient Ideas from the Mediterranean
More Crossover Snacks

Chapter 3: Market Trends

- Historical Trends
Use of Salty Snacks Outpaces Household Growth
Table 3-1: Percent of Households Using Salty Snacks in Last 30 Days by Type of Snack, 2005 vs. 2013 (in thousands)
Americans Are Eating Larger Quantities of Salty Snacks

Table 3-2: Number of Bags of Salty Snacks Eaten by Households in Last 30 Days by Type of Snack, 2005 vs. 2013 (in thousands)

Table 3-3: Average Number of Bags of Salty Snacks Used by Households in Last 30 Days, 2005 vs. 2013 (in thousands)

High-Volume Consumers of Salty Snacks Grow in Importance

Table 3-4: Trends in Household Use of Salty Snacks by Type of Snack and Number of Bags Used in Last 30 Days, 2005 vs. 2013 (in thousands)

Table 3-5: Trends in Household Use of Salty Snacks by Type of Snack and Number of Bags Used in Last 30 Days, 2013

- Market Size and Composition

Salty Snacks Market Has Experienced Moderate Growth

Table 3-6: U.S. Retail Sales of Salty Snacks, 2008-2013 (in million $)

Potato Chips Lead the Pack

Table 3-7: U.S. Retail Sales of Salty Snacks by Type, 2013 (in million $)

Retail Channels Analyzed

Figure 3-1: Share of U.S. Retail Sales of Salty Snacks by Retail Channel, 2013

Popcorn Explodes in Mass Market

Table 3-8: IRI-Tracked Dollar Sales of Salty Snacks by Type of Snack (in thousand $)

Table 3-9: IRI-Tracked Sales of Salty Snacks by Dollar and Volume Growth (in thousands)

Tortilla Chips Top List of Fastest-Growing Products

Table 3-10: Fastest-Growing Salty Snacks with IRI-Tracked Dollar Sales of at Least $3 Million by Product Type

Table 3-11: Fastest-Growing Salty Snacks with IRI-Tracked Dollar Sales of at Least $3 Million (in thousand $)

- Projected Market Growth

Snacking Trends Favor Market Growth

Table 3-12: Changes in Attitudes toward Eating and Snacking Habits, 2004 vs. 2013 (in thousands)

Food Marketers’ Focus on Snacks Will Propel Market

Table 3-13: Trends in Importance of Snacks in U.S. Dollar Sales of General Mills, Inc. and Kellogg Company (in million $)

More Health Halos around Salty Snacks Will Boost Sales

Smaller Companies Will Help Drive Growth

Demography Is Destiny

Major Marketers Still Need to Overcome Health Concerns

Growth Expected to Pick Up

Table 3-14: Projected U.S. Retail Sales of Salty Snacks, 2013-2018 (in million $)

Chapter 4: The Competitors

- Marketer and Brand Shares

Frito-Lay North America Continues to Dominate

Figure 4-1: Percent of IRI-Tracked Dollar Sales of Salty Snacks by Major Marketer

Smaller Marketers and Private Labels Pick Up Steam

Table 4-1: IRI-Tracked Dollar Sales of Salty Snacks by Major Marketer (in thousand $)

Competitive Highlights: Potato Chips

Table 4-2: IRI-Tracked Dollar Sales of Potato Chips (in thousand $)

Competitive Highlights: Tortilla/Tostada Chips

Table 4-3: IRI-Tracked Dollar Sales of Tortilla/Tostada Chips (in thousand $)

Competitive Highlights: Other Salted Snacks (No Nuts)

Salty Snacks in the U.S. Table of Contents

November 2013 © Packaged Facts v

Table 4-4: IRI-Tracked Dollar Sales of Other Salted Snacks (No Nuts) (in thousand $)

Competitive Highlights: Pretzels

Table 4-5: IRI-Tracked Dollar Sales of Pretzels (in thousand $)

Competitive Highlights: Cheese Snacks

Table 4-6: IRI-Tracked Dollar Sales of Cheese Snacks (in thousand $)

Competitive Highlights: Corn Snacks (No Tortilla Chips)

Table 4-7: IRI-Tracked Dollar Sales of Corn Snacks (No Tortilla Chips) (in thousand $)

Competitive Highlights: Ready-to-Eat Popcorn/Caramel Corn

Table 4-8: IRI-Tracked Dollar Sales of Ready-To-Eat Popcorn/ Caramel Corn (in thousand $)

- Competitive Trends

PepsiCo, Inc. Seeks to Expand Opportunities for Salty Snacks

Table 4-9: IRI-Tracked Dollar Sales of Salty Snacks by PepsiCo, Inc./ Frito-Lay North America by Market Segment (in thousand $)
Utz Quality Foods, Inc. Launches Aggressive Expansion Program
Table 4-10: IRI-Tracked Dollar Sales of Salty Snacks by Utz Quality Foods, Inc. by Market Segment (in thousand $)
Table 4-11: Trends in Consumer Preferences for Utz vs. Selected Other Salty Snack Brands, 2004 vs. 2013 (in thousands)
General Mills, Inc. Bets on Green Giant
Table 4-12: IRI-Tracked Dollar Sales of Salty Snacks by General Mills, Inc. by Market Segment (in thousand $)
Mexican Marketers Adopt Different Strategies
Table 4-13: IRI-Tracked Dollar Sales of Salty Snacks by Mexican Marketers (in thousand $)
Table 4-14: Trends in Consumer Preferences for Mission and Tostitos Brands of Tortilla Chips, 2008 vs. 2013

Chapter 5: Marketing, Retailing and New Product Trends
- Marketing Trends
  Seasonal Products and Marketing Programs on the Upswing
  Snyder's-Lance, Inc. Thinks Local
  Popcorn, Indiana Launches National Campaign
  Doritos Brand Goes Global
  Popchips Teams Up with Kate Perry
- Retailing Trends
  7-Eleven Upscales Snack Offerings
  Kellogg Company Expands C-Store Merchandising Tools
  Frito-Lay North America Merchandises One Store at a Time
  Private Label Snacks Need Better Merchandising
- New Product Trends
  New Salty Snacks Products Highlighted
  Table 5-1: Selected New Salty Snacks Products
  Most Successful New Products in Mass Market
  Table 5-2: New Salty Snacks with IRI-Tracked Dollar Sales of at Least $1 Million (in thousand $)
  Lay's Potato Chips Crowdsources New Flavors
  Snyder's of Hanover Rolls Out New Flavor Combinations
  Flamous Brand's Newest Addition

Chapter 6: Consumer Trends
- Consumer Insights: Frequent Salty Snackers
  Who Are Frequent Salty Snackers?
  Table 6-1: Number of Snackers by Category, 2013 (in thousands)
  Deconstructing Frequent Salty Snackers
  Table 6-2: Demographic Profile of Frequent Salty Snackers, 2013
  Frequent Salty Snackers Not Necessarily Couch Potatoes
  Table 6-3: Physical Fitness Activities of Frequent Salty Snackers, 2013
  Healthier Eating on the Minds of Frequent Salty Snackers
  Table 6-4: Attitudes toward Healthy Eating by Frequent Salty Snackers, 2013
  Calories Don't Scare Frequent Salty Snackers
  Table 6-5: Attitudes toward Dieting and Weight Control of Salty and Other Snackers, 2013
  Store-Made Meals and Frozen Dinners Popular
  Table 6-6: Eating Habits of Frequent Salty Snackers, 2013
  Healthy Ingredients Preferred
  Table 6-7: Preferences for Food Ingredients of Salty and Other Snackers, 2013
- High-Volume Consumers of Salty Snacks
  Who's Eating Large Quantities of Salty Snacks
  Table 6-8: Number of Consumers Living in Households Consuming High Volumes of Salty Snacks by Type of Salty Snack, 2013 (in thousands)
  Pretzel Eaters Are Different
  Table 6-9: Demographic Characteristics of Consumers Living in Households Using High Volumes of Salty Snacks, 2013
  Popcorn Tops in Popularity among All Demographic Segments
  Table 6-10: Percent of Demographic Segments Living in Households Using High Volumes of Salty Snacks, 2013
Ordering:  
Order Online - http://www.researchandmarkets.com/reports/2811422/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Salty Snacks in the U.S., 3rd Edition
Web Address: http://www.researchandmarkets.com/reports/2811422/
Office Code: SCBRR67

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Copy</td>
<td>USD 3400 + USD 58 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>USD 2400</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License</td>
<td>USD 4500</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td>USD 6000</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [Mr □ Mrs □ Dr □ Miss □ Ms □ Prof □]
First Name: ____________________________ Last Name: ____________________________
Email Address: * ____________________________
Job Title: ____________________________
Organisation: ____________________________
Address: ____________________________
City: ____________________________
Postal / Zip Code: ____________________________
Country: ____________________________
Phone Number: ____________________________
Fax Number: ____________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: 

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World