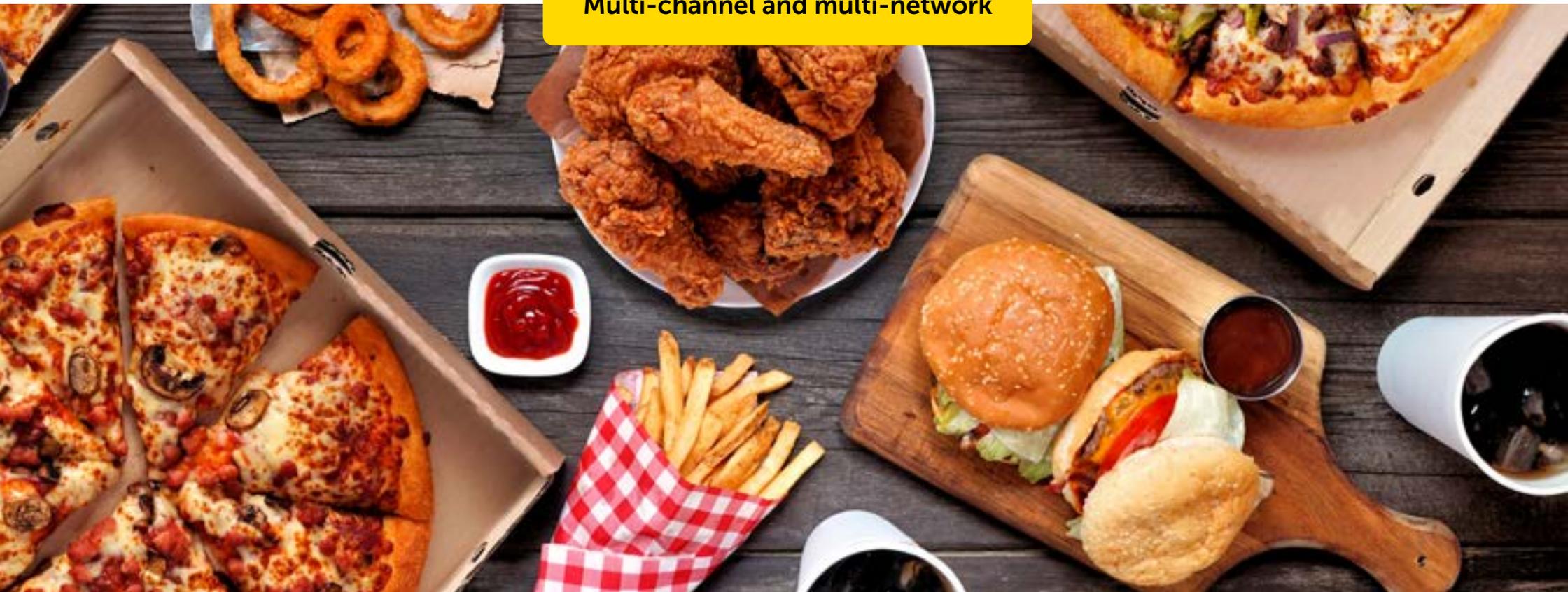




THE SNACK FOOD MARKET

Multi-channel and multi-network





The term “snack food” originally had connotations of tiny morsels to nibble on, nowadays it stands for a real dietary practice, one that involves quickly consuming ready-to-eat dishes, without necessarily needing cutlery. Full meals, typically consumed at lunchtime, snack food tends to be more affordable than a traditional restaurant meal.

Introduction

The snack food family covers a wide variety of actors: fast food, bakeries, restaurants (dine-in/takeaway), supermarkets, local groceries, meal delivery platforms, and the list goes on.

Nonetheless, fast food restaurants are the only ones that mainly sell this type of meal, even if COVID led a large number of more traditional restaurants to redirect their efforts towards **these new takeaway or delivery offerings**.

Snack food today is the real engine fuelling commercial restaurants, ever since the pandemic gave it a boost with curbside pickup and delivery options.



Although working from home has delayed **a strong recovery in fast lunch meals**, experts agree that this market segment is constantly evolving.

And this trend should continue with higher quality menus and a rise in the average bill.

A boost in the appeal of snack food for consumers due to the pandemic

COVID shined a light on consumer interest in snack food. A study published in Les Echos* reported that nearly **9 in 10 adults around the world** (88%) said they **snacked more** (46%) or as much (42%) during the pandemic as before. More than half of the respondents (52%) stated that snack food was a “lifesaver” during the pandemic, especially parents working from home (69%).

British people eat 2.5 times a day outside of mealtimes and 1 out of 3 meals are eaten outside the home (European record !)

* Les Echos and Mondelēz. Methodology: online survey conducted by The Harris Poll for Mondelēz International between 6 and 20 October 2020, with 6,292 respondents over the age of 18 from 12 countries (Australia, Brazil, Canada, China, France (n=519), Germany, India, Indonesia, Mexico, Russia, UK and USA)

** CHD Expert, March 2019





Key figures: **2022-2023**



A market worth
£22 billion
(+4.1% in 2023)



A market with
152,120 outlets
(+0.9% from 2022), with
1,397 new outlets in 2023



The average snack meal costs
£5-7

Source: Food to Go Market Report 2023



Top 3 most popular savoury snack foods since the start of 2022

1.

Indian



2.

Burger



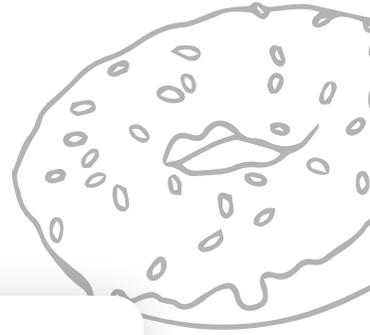
3.

Pizza





Snack food at supermarkets



TOP 3 SNACK MEALS SOLD BY SUPERMARKETS

1.

Sandwiches (58%)



2.

Pizza (50%)



3.

Salads (32%)



TOP 3 SNACK DESSERTS SOLD BY SUPERMARKETS

1.

Fresh fruit (40%)



2.

Yoghurt (25%)



3.

Baked goods (23%)



Source: CHD Expert and Datassential, 2022

Source: CHD Expert and Datassential, 2022





A boom in meal deliveries



A market **up 85%** between 2019 and 2021



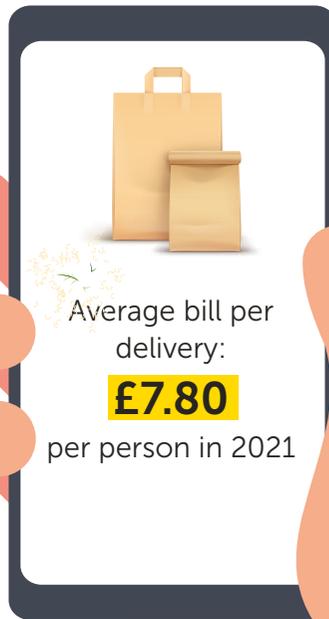
Men in control of orders (57%)



Families account for **1/3 of deliveries**



Burgers **no. 1** in sales (1 in 3 orders)



Average bill per delivery: **£7.80** per person in 2021



Poke bowls for lunch: No. 1 in worldwide sales for Deliveroo in 2021

Pizza

No. 1 in UK sales for Just Eats UK in 2021

Source: The NPD Group

Source: Deliveroo





Trends on the UK Food Market

Healthier products

UK is a leader in innovation in this sector, with high consumer expectations for health claims, such as immunity, stress relief and improved sleep. Consumers are prepared to pay more for snack food if they are assured that they contain quality ingredients (certified products, organic, healthy, balanced recipes, etc.). We are witnessing the “premiumization” of beverages, meals and snacks.

Healthy options abound, with the requisite “xxx-free” recipes (additive-free, colourant-free, preservative-free, gluten-free and meat-free).

Vegan & Vegetarian

The takeaway sector has responded with speed to the shift in consumer demand for vegan and vegetarian. Over 90% of takeaway restaurants offer vegetarian options with more than half also catering for gluten free, dairy free and vegan customers. In addition, more than three quarters offer dishes such as salad or fruit, 73% offer a choice on portion sizes and 50% of takeaway restaurants in the UK now offer low-salt options.





Alternative products

In the interests of health and the environment, substitute products are nowadays a real demand, replacing our everyday food products by products that are just as nutritious and better for health and environment. With the growing population and the estimated to reach 9.8 billion people by 2050, these alternative products will have to play a major role in future food demand. Here are some examples of healthy alternative/substitute products :

Seaweed

Seaweed would be the most promising food to feed the world's 9 billion people by 2050. The WHO sees algae as the food of the future. Humans only consume 4% of the algae available on Earth. Originally from Japan, the consumption of seaweed is gradually arriving in the Western world.

Insects

Insects also have nutritional advantages: mealworms and crickets are on a par with meat in terms of protein, and can be rich in fat (including essential fatty acids). They are also rich in omega-6, vitamins B2 and A and iron. Recently, they have been marketed in some countries as meat substitutes, in the form of steaks for burgers or meatballs.

Plant-based

More and more plant based products are appearing on the market. Manufacturers are succeeding in imitating the textures and tastes of various products ranging from simple steak to from steak to foie gras to merguez.





Latest news in snack food

Plastic-free packaging

In response to a new regulation, snack foods need to be greener, namely by using packaging that is plastic free, recyclable, recycled, compostable, reusable, etc.

Innovative beverages

As accompaniments for meal deals, beverages are undoubtedly one of the most dynamic snack food sectors. One of the [trends observed in 2022](#) was the arrival of new beverage options that have contributed to the recovery of the fast casual segment.

Regulatory change in 2023

The UK Government will introduce legislation on 1 October 2023 to restrict the marketing of high-fat, high-sugar and high-salt foods by volume, meaning that high-volume promotions will no longer be permitted. Already, from October 2022, foods in this category can no longer be sold at key shop locations, such as shop entrances, aisle ends and checkouts. This represents a new challenge for food manufacturers as companies reformulate their products to avoid these restrictions. Further legislative tightening is planned for 2024.

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