

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The popularity of snacking has benefited all of the salty snacks segments and contributed to sales gains of 4.8% in 2018. While continued growth is projected in this \$18 billion market, a slower growth pace is projected through 2023."

- **Beth Bloom, Associate Director – Food & Drink**

This report looks at the following areas:

- Slight sales slowdown in salty snack sales predicted
- Salty snacks remain a slight snack favorite, but competition can be seen
- The tug-of-war between health and indulgence

Strong demand for snacks has resulted in increased competition and an expanded view of what constitutes a snack, which can challenge traditional snack categories. While craving satisfaction, flavor, and indulgence are key in this category, nearly two thirds of salty snack eaters wish there were healthier options for them to turn to.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Slight sales slowdown in salty snack sales predicted

Figure 1: Salty snack statements – Reduction, January 2019

Salty snacks remain a slight snack favorite, but competition can be seen

Figure 2: Salty snack statements – Any agree: Preference, January 2019

The tug-of-war between health and indulgence

Figure 3: Salty snack statements – Any agree: Health, January 2019

The opportunities

Smaller segments may do well to diversify offerings

Figure 4: Salty snack consumption, January 2019

Flavor rules salty snack choice

Figure 5: Important salty snack attributes, January 2019

Low-calorie snacks could hit sweet spot of health and desire

Figure 6: Healthy salty snacks compared to innovation of interest, January 2019

What it means

### The Market – What You Need to Know

Salty snack sales reach \$18 billion in 2018

Snacking remains strong

Salty snacks remain a slight snack favorite, but competition can be seen

Category players can reinvent to maintain relevance

### Market Size and Forecast

Salty snack sales reach \$18 billion in 2018

Figure 7: Total US retail sales and forecast of salty snacks, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of salty snacks, at current prices, 2013-23

Figure 9: Total US retail sales and forecast of salty snacks, at inflation-adjusted prices, 2013-23

### Market Breakdown

“Other” salty snacks soar

Meat snack segment benefits from interest in protein

Cheese snacks see big gains, new products can expand engagement

Strong popcorn growth projected to slow

Pretzels sales are flat

Figure 10: Total US retail sales and forecast of salty snacks, by segment share, at current prices, 2016-18

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 11: Total US retail sales and forecast of salty snacks, by segment, at current prices, 2013-23

"Other" channels continue strong category gains

Figure 12: Total US retail sales of salty snacks, by channel, at current prices, 2016 and 2018

### Market Perspective

Salty snacks have a small, perhaps fleeting, snack advantage

Figure 13: Salty snack statements – Any agree: Preference, January 2019

The snack space gets complex

Figure 14: Percentage growth in select snack categories, 2013-18

Figure 15: Snack purchase drivers, November 2018

Stacked against other snacks, category struggles with health

Figure 16: Correspondence analysis – Symmetrical map – Perception of snacks, December 2018

Figure 17: Perception of snacks, December 2018

### Market Factors

Snacking remains strong

Figure 18: Snacking frequency, January 2015 and November 2018

Pay attention to demographic shifts

Figure 19: Population by age, 2013-23

### Key Players – What You Need to Know

PepsiCo domination persists

"Low and no" claims are most popular in the category

Salty snacks get sweet

RTE popcorn challenges microwaveable

### Company and Brand Sales of Salty Snacks

PepsiCo dominates MULO sales of salty snacks

Figure 20: Multi-outlet sales of salty snacks, by leading companies share, 2018

Figure 21: Multi-outlet sales of salty snacks, by leading companies, rolling 52 weeks 2017 and 2018

### What's Working?

All meat snack leaders see growth

Figure 22: Multi-outlet sales of meat snacks, by leading companies and brands, rolling 52 weeks 2017 and 2018

Cheetos dominate cheese-flavored snacks, but even cheesier products move in

Figure 23: Multi-outlet sales of cheese snacks, by leading companies and brands, rolling 52 weeks 2017 and 2018

Private label sees strong growth in corn snacks

Figure 24: Multi-outlet sales of corn snacks, by leading companies and brands, rolling 52 weeks 2017 and 2018

Private label also makes gains in "other" salty snacks

Figure 25: Multi-outlet sales of other salty snacks, by leading companies and brands, rolling 52 weeks 2017 and 2018

GMO-free claim gains steam

Figure 26: Salty snack launches – Claims share, by segment, 2015-19\*

Salty snacks hit the sweet spot

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 27: Salty snack launches – Flavor share, by segment, 2015-19\*

### What's Struggling?

Pop Secret struggles to compete against RTE popcorn options

Figure 28: Multi-outlet sales of popcorn, by leading companies and brands, rolling 52 weeks 2017 and 2018

Most pretzel leaders dip

Figure 29: Multi-outlet sales of pretzels, by leading companies and brands, rolling 52 weeks 2017 and 2018

### What's Next?

Flavor frenzy

Protein promotion

Very veggie

For the love of legumes

Diet specific

Vegan varieties

### The Consumer – What You Need to Know

91% of US adults eat salty snacks

Cravings drive consumption

Consumers aren't exhibiting healthy snack behavior

Consumers don't want to sacrifice flavor for health

Snackers are more likely to stick to flavors than brands

Big brands don't completely stumble on health

### Salty Snacks Consumption

Salty snack consumption nears ubiquity

Figure 30: Salty snack consumption, January 2019

Close to a third of salty snacks eaters have reduced consumption

Figure 31: Salty snack statements – Reduction, January 2019

Men make up a larger share of meat snack eaters

Figure 32: Share of salty snack consumption, by gender, January 2019

The majority of salty snack eaters are under 45

Figure 33: Share of salty snack consumption, by age, January 2019

Presence of children increases likelihood of snacking

Figure 34: Salty snack consumption, by parental status, January 2019

### Reasons for Salty Snacks Consumption

Cravings and indulgence lead consumption drivers

Figure 35: Reasons for salty snack consumption, January 2019

Functional attributes resonate with men

Figure 36: Reasons for salty snack consumption, by gender, January 2019

Many options for messaging to younger snackers

Figure 37: Reasons for salty snack consumption, by age, January 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Parents look for time savings

Figure 38: Reasons for salty snack consumption, by parental status, January 2019

### Snack reducers can be retained through time savings

Figure 39: Reasons for salty snack consumption, by snack statements, January 2019

## Important Salty Snacks Attributes

### Flavor rules salty snack choice

Figure 40: Important salty snack attributes, January 2019

### Salty snack segments can focus on unique appeal

Figure 41: Important salty snack attributes, by salty snack segment, January 2019

### Snack motivation impacts attribute importance

Figure 42: Important salty snack attributes, by reasons for salty snack consumption, January 2019

### Appeal to women through health and men through indulgence

Figure 43: Important salty snack attributes, by gender, January 2019

### Price is key to younger snackers

Figure 44: Important salty snack attributes, by age, January 2019

### Lower-earning households look for affordability and satiety

Figure 45: Important salty snack attributes, by household income, January 2019

### Influence of children seen in portability, portionability, and durability

Figure 46: Important salty snack attributes, by parental status, January 2019

## Salty Snacks Flavors

### Three quarters of salty snack eaters want cheese-flavored options

Figure 47: Salty snack flavors, January 2019

Figure 48: Salty snack flavors, by salty snack consumption, January 2019

### Flavor preferences differ by gender, men go for the extreme

Figure 49: Salty snack flavors, by gender, January 2019

### Younger snackers show greatest interest in unique flavors

Figure 50: Salty snack flavors, by age, January 2019

## Healthy Salty Snacks

### Consumers aren't exhibiting healthy snack behavior

Figure 51: Salty snack statements – Health, January 2019

Figure 52: Salty snack statements – Any agree: Health, January 2019

### Young snackers are more interested in indulgence, but they recognize the value of health

Figure 53: Salty snack statements – Health, by age, January 2019

Figure 54: Salty snack statements – Any agree: Health, by age, January 2019

### Category can aim at health through sodium reduction

Figure 55: Healthy salty snacks, January 2019

### Health-conscious women can be targeted through ingredient claims

Figure 56: Healthy salty snacks, by gender, January 2019

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Salty Snacks Innovation

Close to half of snackers are interested in low-calorie salty snacks

Figure 57: Innovation of interest, January 2019

Pretzel thins eaters are more likely to be drawn to health innovation

Figure 58: Innovation of interest, by salty snack consumption, January 2019

High-protein snacks appeal to men; women open to small pack sizes

Figure 59: Innovation of interest, by gender, January 2019

Stress snackers plead for help

Figure 60: Innovation of interest, by reasons for salty snack consumption, January 2019

### Snack Statements

Emotion

Salty snacks are more likely to improve mood than cause guilt

Figure 61: Salty snack statements – Any agree: Emotion, January 2019

Habits

Majority of salty snack choices are impulsive

Figure 62: Salty snack statements – Any agree: Impulse, January 2019

Brand

Snackers are more likely to stick to flavors than brands

Figure 63: Salty snack statements – Any agree: Habits, January 2019

Big brands don't completely stumble on health

Figure 64: Salty snack statements – Brand, January 2019

### Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

### Appendix – The Market

Figure 65: Total US retail sales and forecast of meat snacks, at current prices, 2013-23

Figure 66: Total US retail sales and forecast of meat snacks, at inflation-adjusted prices, 2013-23

Figure 67: Total US retail sales and forecast of popcorn, at current prices, 2013-23

Figure 68: Total US retail sales and forecast of popcorn, at inflation-adjusted prices, 2013-23

Figure 69: Total US retail sales and forecast of cheese snacks, at current prices, 2013-23

Figure 70: Total US retail sales and forecast of cheese snacks, at inflation-adjusted prices, 2013-23

Figure 71: Total US retail sales and forecast of pretzels, at current prices, 2013-23

Figure 72: Total US retail sales and forecast of pretzels, at inflation-adjusted prices, 2013-23

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Salty Snacks - US - March 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 73: US retail sales and forecast of corn snacks, at current prices, 2013-23

Figure 74: Total US retail sales and forecast of corn snacks, at inflation-adjusted prices, 2013-23

Figure 75: Total US retail sales and forecast of other salty snacks, at current prices, 2013-23

Figure 76: Total US retail sales and forecast of other salty snacks, at inflation-adjusted prices, 2013-23

Figure 77: US supermarket sales of salty snacks, at current prices, 2013-18

Figure 78: US drug store sales of salty snacks, at current prices, 2013-18

Figure 79: US convenience store sales of salty snacks, at current prices, 2013-18

Figure 80: US sales of salty snacks through other retail channels, at current prices, 2013-18

### Appendix – Key Players

Figure 81: Multi-outlet sales of salty snacks, by leading companies, rolling 52 weeks 2017 and 2018

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)