






Biscuits & Crisps and Snacks Monthly S&I Review

March 2025 -
April 2025 report



Overview

Market/Category	Insights	Actions
	<ul style="list-style-type: none"> For convenience retailers, value messaging will continue to be key to help deter shoppers' perception of being more expensive. Applying promotions like meal deals to drive spend will also allow shoppers to feel they are getting the most for their money. Convenience Shoppers expect Food to Go missions to be close to home, speedy and convenient Almost half of convenience visits are focused on Food-To-Go only 	<ul style="list-style-type: none"> Important to have variety of meal deal options, to meet a variety of shopper needs and drive value Use beacon brands to help signposting and drive the efficiency for a shopper Availability is key to shopper satisfaction – with better weather comes more opportunity!
	<ul style="list-style-type: none"> S&I sees underperformance vs other channels in the L4W. Unit losses come from Everyday Biscuits and Everyday Treats, with Oreo, Maryland, and Private Label driving the greatest unit declines. Innovation and ATL campaigns have driven strong performance within pladis, robusting value and volume growth within the number 1 manufacturer. Innovation can help meet shoppers' needs on-the-go. 	<ul style="list-style-type: none"> Special Treats have shown growth, so focus in this area drives additional value per unit sold. Increasing focus within this area, helps meet shoppers' need for quality and offers a trade-up. Gold Billions now moves into the Top 10 biscuit brands – capitalise on this brand and Flipz to meet increases in Food-to-Go and cross-category missions.
	<ul style="list-style-type: none"> A tough C&S period continues within Symbols & Indies. Whilst Kellanova increases through Cheez-Its, Pringles is now in decline. Walkers Crisps continue to decline, with additional declines for Nik Naks – potentially shifted to Takis sales? Sharing continues to grow within C&S. Handypacks suffer with S&I, with a potential switch across to Sharing and a focus on Sharing within innovation. 	<ul style="list-style-type: none"> Take advantage of all campaigns to excite shoppers – core campaigns as well as NPD signpost the category and create shopper interruption. Unlock increase Food-to-Go opportunities through including handypacks within Meal Deals.



Convenience Trends ***a spotlight on Missions***

Convenient location top driver to store, with convenient meal options winning the food-for-later missions.

In IGD's most recent ShopperVista research, they asked shoppers about their motivation for completing key missions, including food-for-later, snacking, and top-ups.

55% of shoppers claimed that the main reason they chose to visit a convenience store in February was due to its convenient location. Convenience extends not only to when shoppers purchase their products, but in how they are prepared and consumed.

Food for Later

For the food-for-later missions, shoppers were **driven by convenience**. Convenience in this sense not only meant the location of the store but also extended to how they cooked and consumed the meal itself. They wanted **something quick and easy**. Above all else, they **didn't want to have to travel far** to get it.

Key insight:

In convenience stores, manufacturers should make the most of limited space by **collaborating with adjacent categories to create food-for-later-focused fixtures**.

Meal deals key in driving value within Snacking with shoppers open to multiple retailers to complete a top-up mission.

Snacking

On the snacking mission, **shoppers favoured forecourts**, but quickly acknowledged they were paying more to shop there. Even with this, **value was still a key driver**. Some shoppers opted to buy more through **meal deals** as they sought the best value. For others, value meant **planning ahead** and **incorporating snacks into a larger mission**.

Key insight:

For convenience retailers, **value messaging will continue to be key** to help deter shoppers' perception of being more expensive. **Applying promotions like meal deals to drive spend** will also allow shoppers to feel they are getting the most for their money.

We have seen the growth in **premium offerings** for lunchtime meal deals, which are likely to appeal to shoppers. However, to enhance the value offering beyond price, convenience retailers should consider **calling out health credentials in meal deals**, particularly highlighting healthier options.

Main Shop

While shoppers tend to pick the **same retailer every time for main shop** missions, **when it comes to top-up, they are much more open** to multiple retailers. The main driver of this openness is simply the **convenience of the location**.

Key insight:

The frequency and openness of the top-up missions means it is vital for **manufacturers to increase their visibility** across channels and retailers so that no matter where a shopper is going, they can find your product.

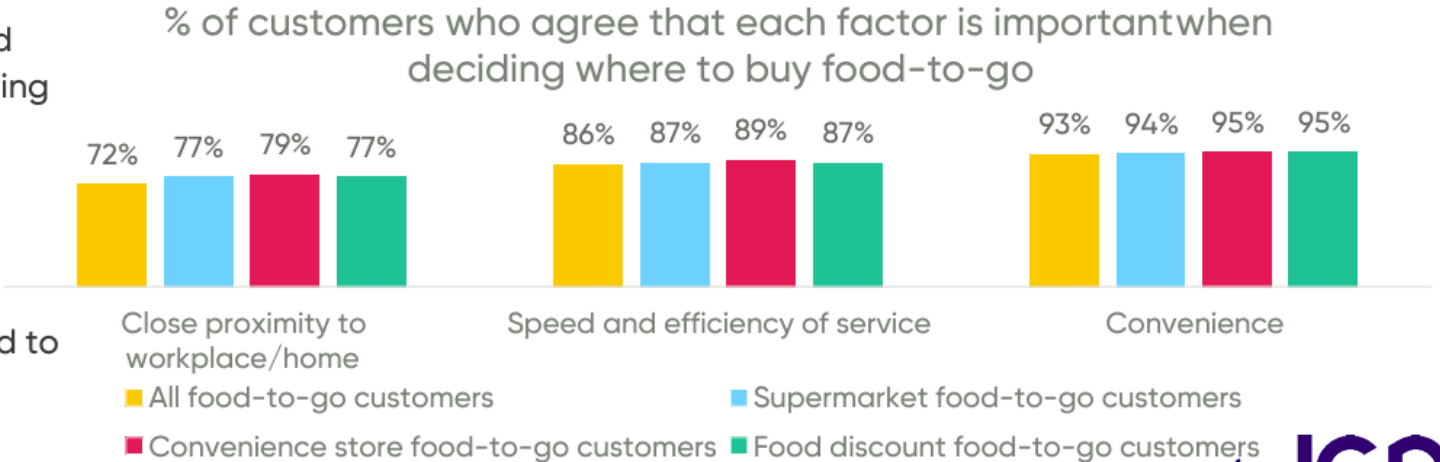
Convenience shoppers expect Food To Go missions to be close to home, speedy and convenient.

Attitudes towards retail food-to-go centre around it being functional, habitual and convenient. Customers over-index on choosing their store based on location and speed of service.

As these are some of the main key satisfaction drivers, it is important that retailers keep convenience at the top of the priority list when developing food-to-go strategy. Making the experience more 'enjoyable' must not add friction into the process.

Format focus will be important here – for example, food-to-go-focused stores in city centres and dedicated food-to-go zones and checkouts in larger stores for customers wanting to avoid the main store.

There are still more opportunities for retail to make food-to-go more exciting – with wider ranges, targeting more dayparts, brand partnerships and a renewed focus on hot food to compete with foodservice operators.

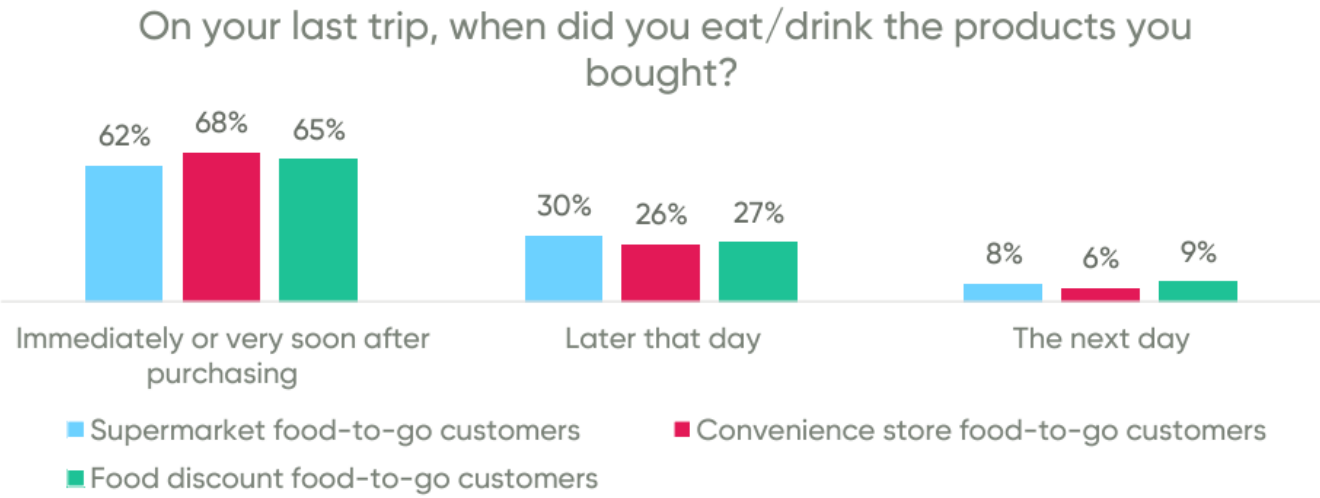
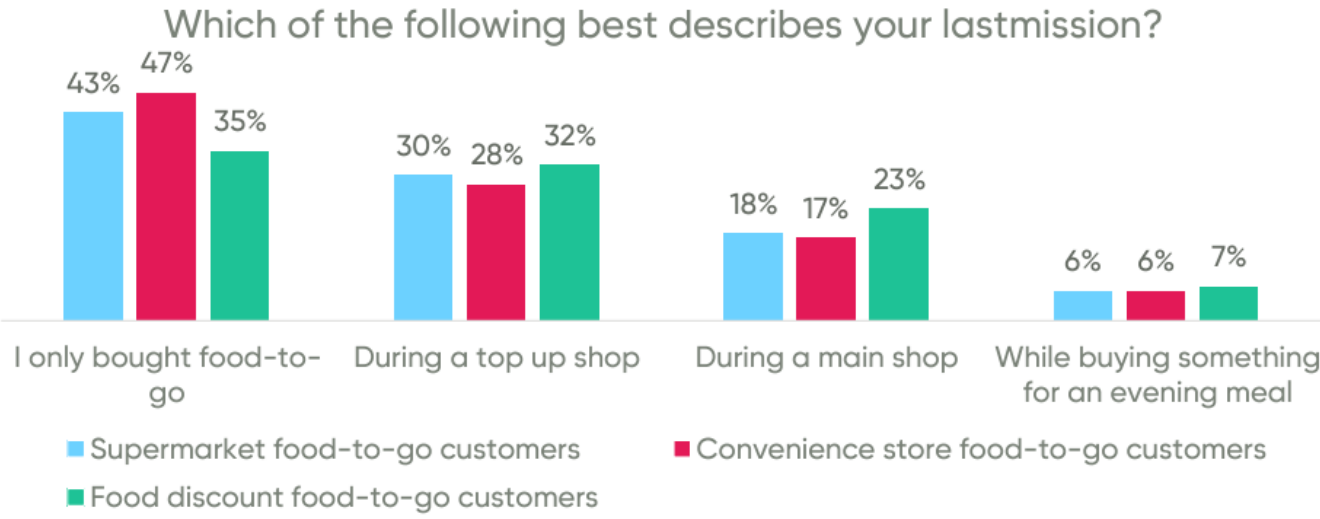


Almost half of convenience visits are focused on Food To Go only.

Convenience store food-to-go customers are most likely to be on standalone food-to-go missions. This aligns with our [wider channel usage and missions data](#).

The convenience channel being most likely to be used for a standalone mission and the products being consumed immediately is partly reflective of the store locations. A higher proportion of convenience stores will be in city centres and transport hubs, where office workers and travellers will be, making convenience stores an appealing option.

With these customers only focused on food-to-go, poor availability of products could turn them away to another retailer or foodservice operator. Ensuring good availability throughout the day will be crucial to not losing out on the whole basket.



In summary



Convenience store customers

1

Most likely to be on a standalone food-to-go mission and to consume products immediately after purchase

2

Most concerned by convenience-related factors such as nearby location and a fast and efficient process

3

Least likely to be satisfied with value for money on last mission, and only channel to have not seen this increase vs last year

1

Important to have variety of meal deal options, to meet a variety of shopper needs and drive value

2

Use beacon brands to help signposting and drive the efficiency for a shopper

3

With improved weather comes increased footfall – ensure stores are geared up to capitalise on OTG purchases and drive perception of value through Meal Deal and cross-category promotions



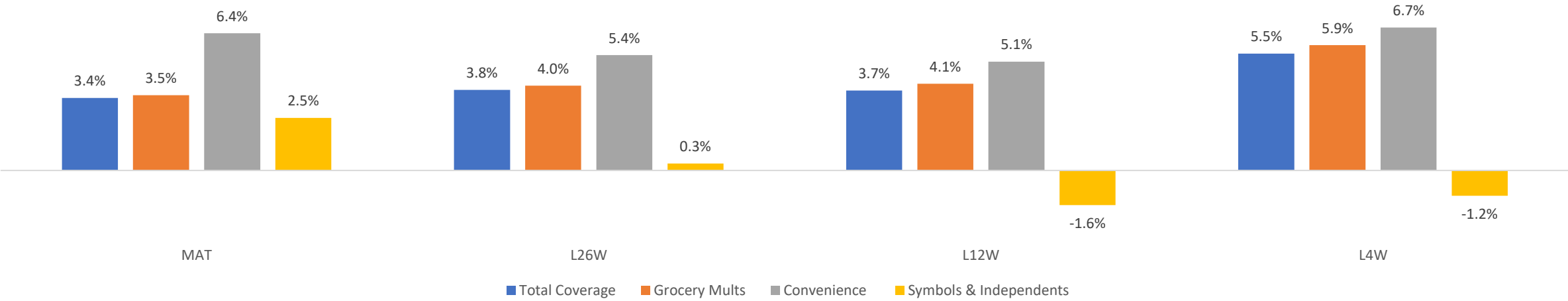
Biscuits Performance Review



S&I shows underperformance in value and volume compared to other customer markets in L4W, despite overall value growth in longer time frames. All channels suffer in terms of units in L12W.

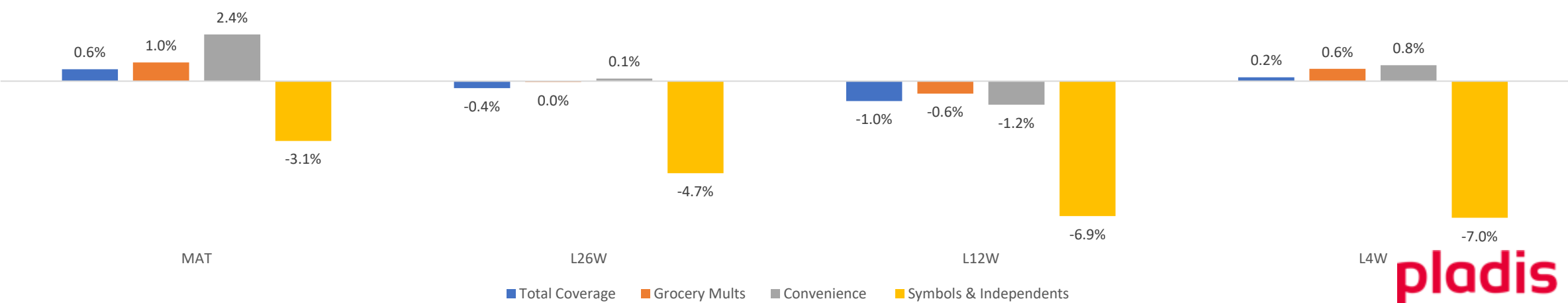
VALUE % CHG

Biscuits Value % Change by channel vs YA, by time period



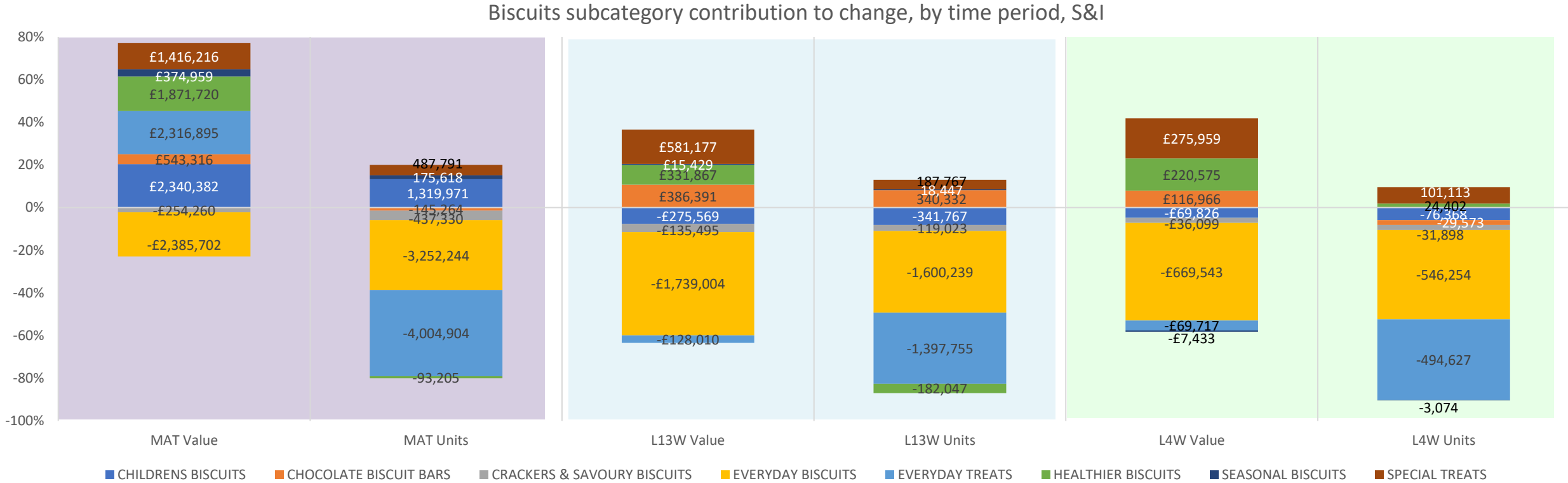
UNITS % CHG

Biscuits Units % Change by channel vs YA, by time period





SUBCATEGORY: A challenging performance in L4W, with Everyday Biscuits most significantly draining both value and volume. Everyday Treats drains value and especially volume. Special Treats is now the biggest driver of value and volume growth. Value and volume growth for Healthier Biscuits in the L4W, although gains do not offset losses.



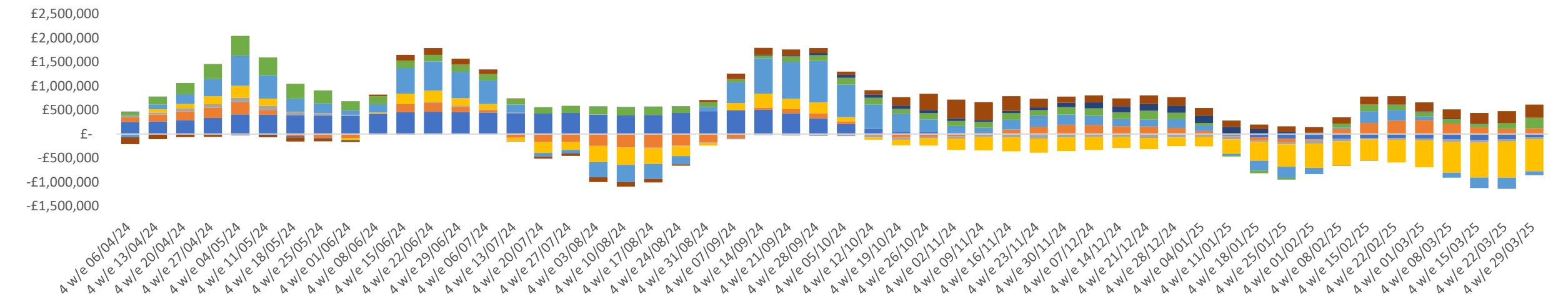
In the L4W, Special Treats growth has been driven by Foxs Fabulous Cookies (+£106.0k and +47.6k) and Foxs Fabulous Half Coated Cookies (+£93.4k and +39.6k). Healthier Biscuits growth led by Cadbury Brunch Bar (+£68.8k and +49.6k).

Everyday Biscuits declines in L4W come through Maryland Cookies (-£229.1k value and -179.4k units). Caramel Chocolate Digestives (-£179.7k and -103.5k) driving Everyday Treats decline, as well as Bobby's Biscolata Stix (-£53.1k and -89.2k).

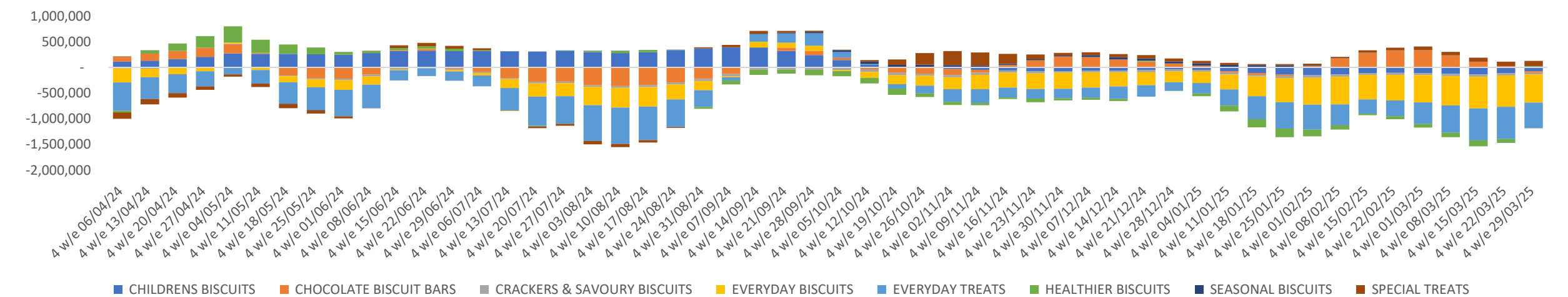


Volume continues to suffer, with Everyday Biscuits and Everyday Treats leading unit declines in recent time frames. Everyday Biscuits is also the largest value drainer. Special Treats has begun leading value and volume growth.

Trended S&I value £ contribution to Biscuits change in 2024 by subcategory vs YA rolling 4W



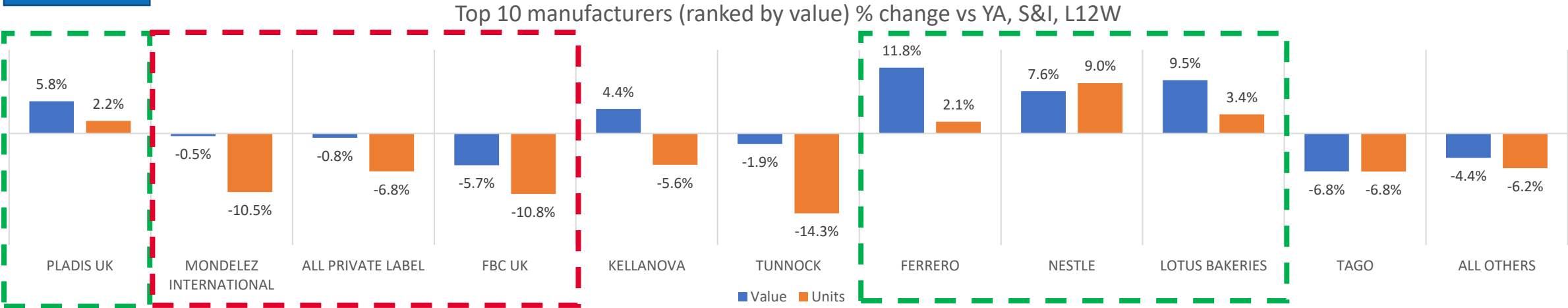
Trended S&I unit contribution to Biscuits change in 2024 by subcategory vs YA rolling 4W



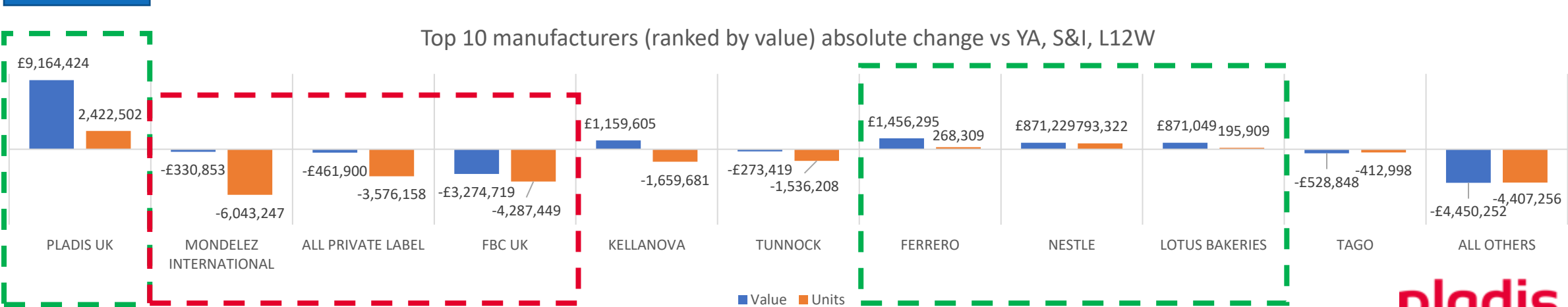


MANUFACTURER: Value and volume growth delivered by pladis, Ferrero, Nestle and Lotus, with pladis outperforming all other manufacturers. Mondelez is the biggest drainer of volume growth, while FBC most significantly drains value. Heavy volume losses for Private Label.

% CHANGE



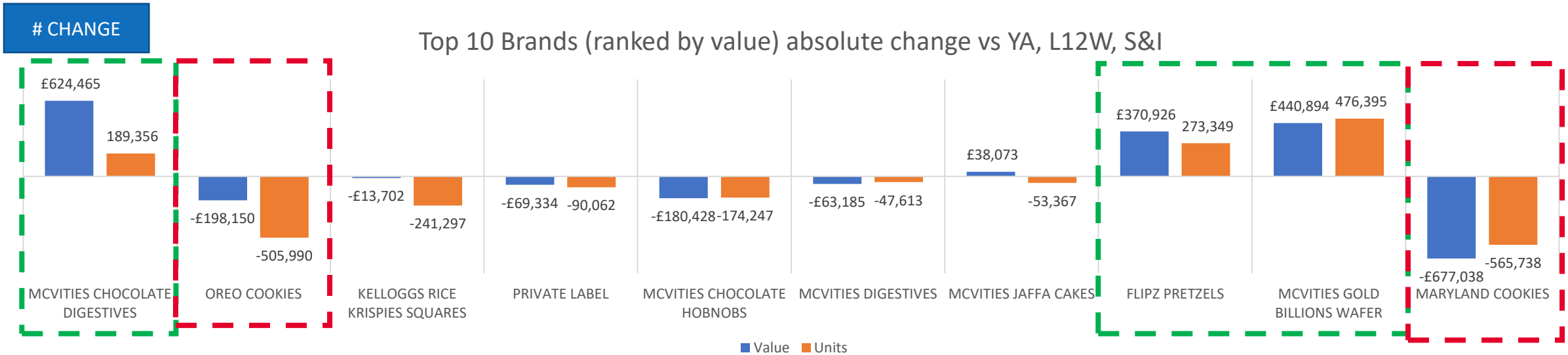
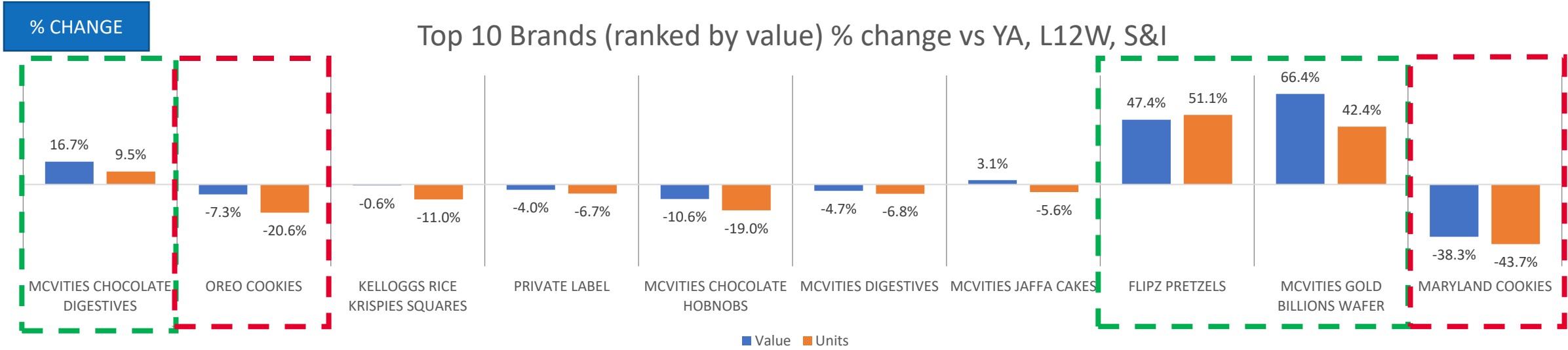
CHANGE



pladis



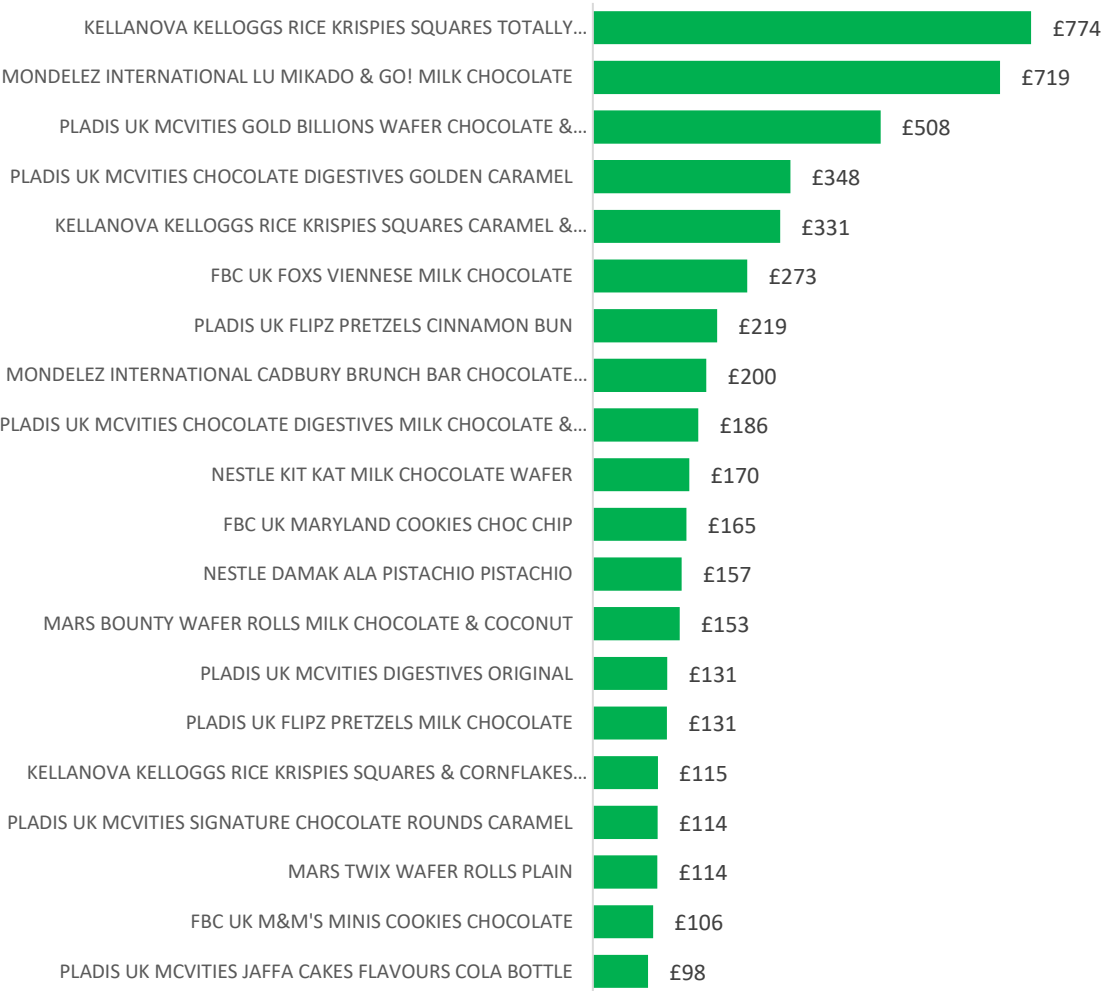
BRAND: Continued value and volume contribution from McVitie's Chocolate Digestives, Flipz, and Gold Billions Wafer (now a Top 10 brand!). Maryland Cookies and Oreo haemorrhage over 1m units in the L12W, with Rice Krispies Squares pulling Healthier biscuits back.



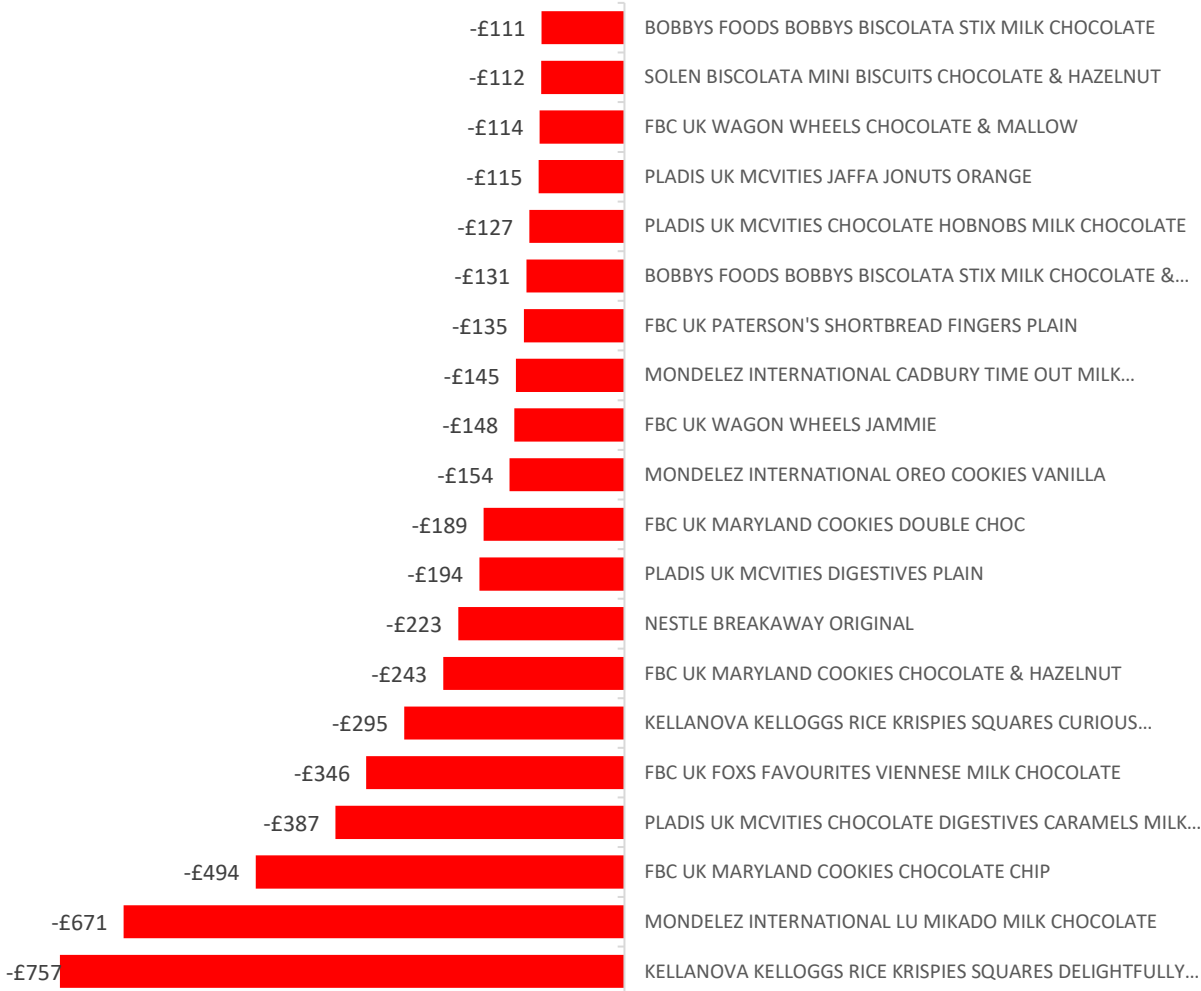


Innovation driving growth with McVities Gold Billions Hazelnut now driving top change, followed by Gold Chocolate Digestives. A strong performance from Cinnamon Bun Flipz and Cadbury Brunch Bar. Maryland Cookies Chocolate Chip leads declines, while Maryland Hazelnut also suffers. Brand descriptor changes to both Chocolate and Caramel Rice Krispies Squares, as well as to Lu Mikado, Foxs Viennese and Caramel Chocolate Digestives, make them all appear at the top and bottom.

Top 20 product drivers - L12W £000s



Bottom 20 product drivers - L12W £000s





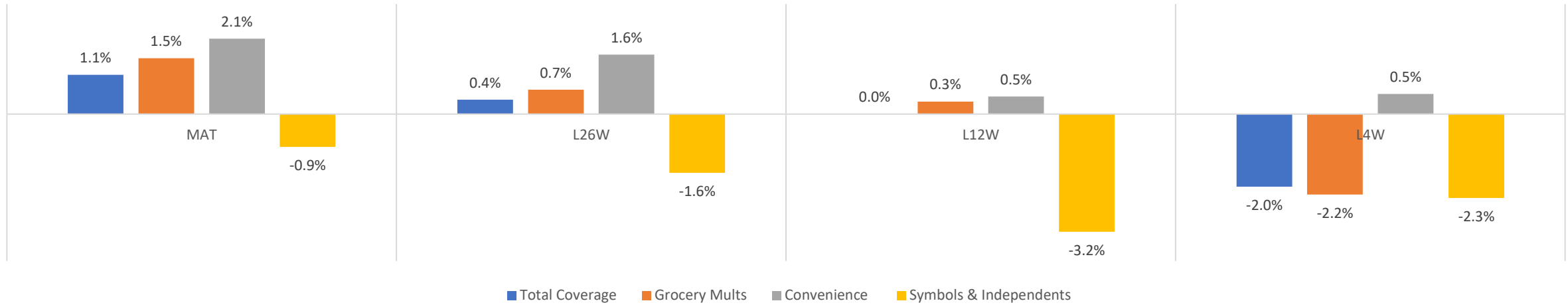
C&S Performance Review



A tough four weeks across the board. The overindex of handypacks in S&I drives continual declines in volume, with the channel underperforming vs Total Market. S&I also suffers heavy value losses. Convenience outperforms vs other markets in L4W.

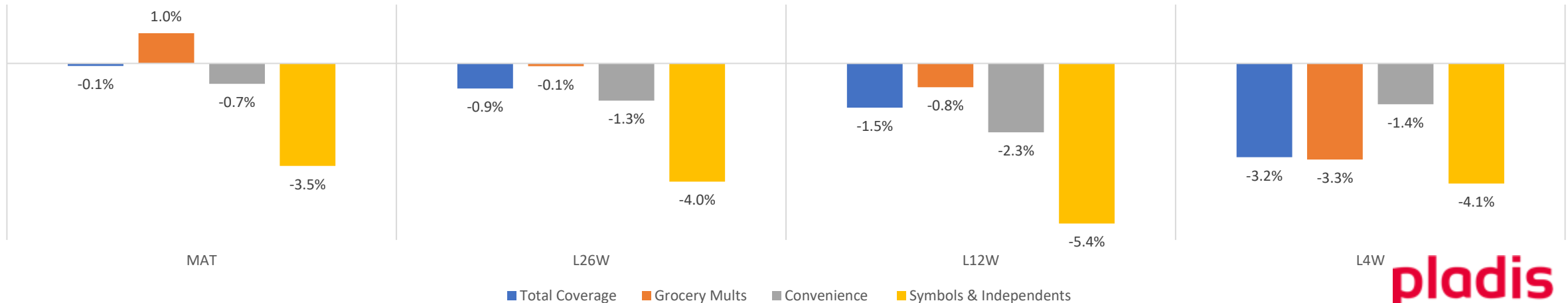
VALUE % CHG

C&S Value % Change by channel vs YA, by time period



UNITS % CHG

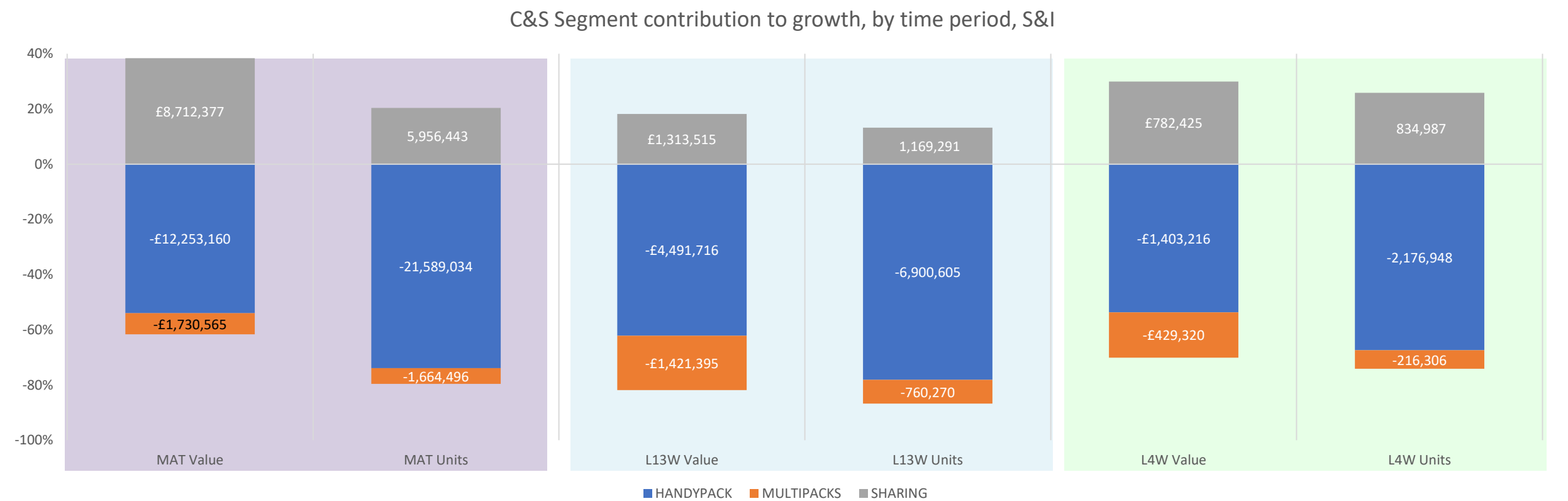
C&S Units % Change by channel vs YA, by time period



pladis



SEGMENT: Handypacks remains in consistent value and volume decline and haemorrhages the market. Multipacks also suffer across all time frames. Sharing segment offers value and volume growth, but this is not enough to offset declines.

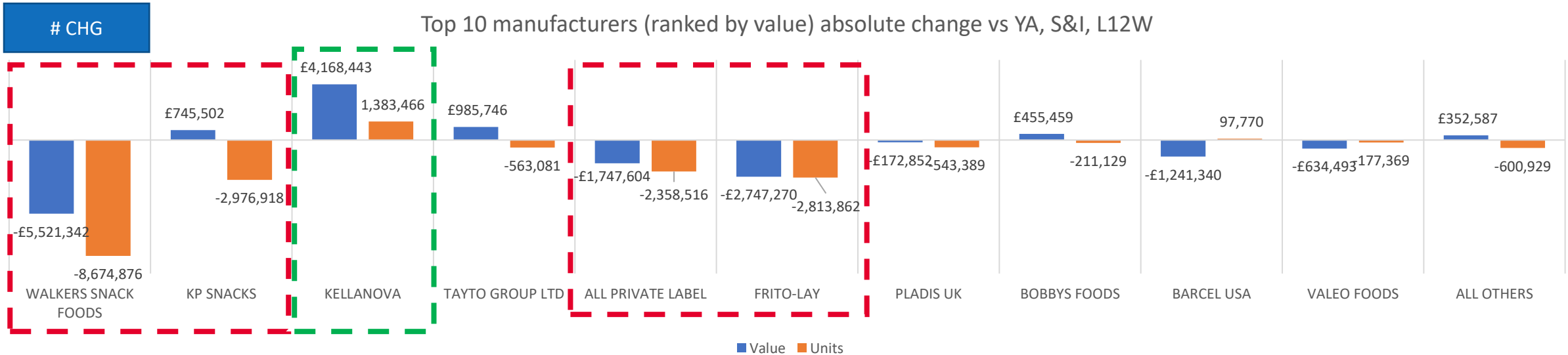
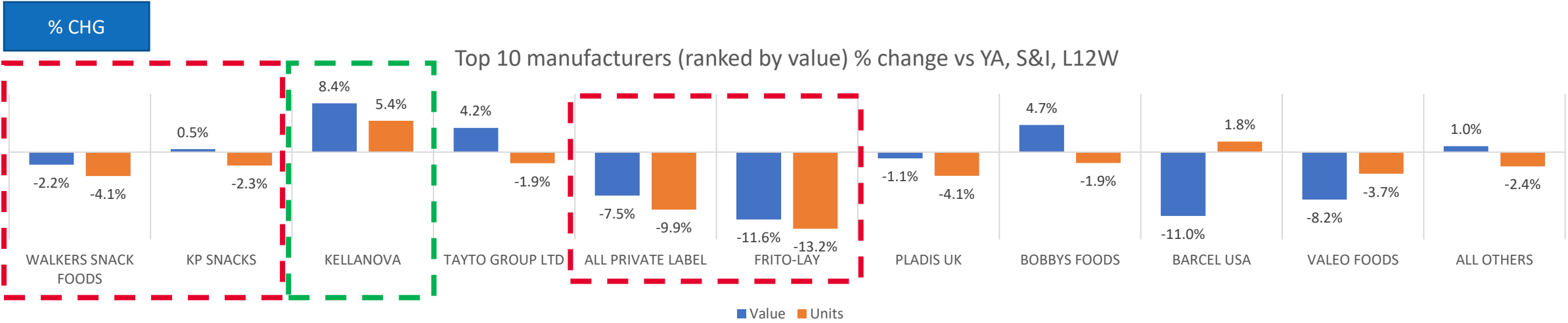


Sharing delivers consistent growth over all time periods in both value and volume.

Multipacks are in value and volume decline across all periods. Huge declines for Handypack in all measures and time periods, impacting the overall performance of S&I, with on the go packs overindexing in this channel.

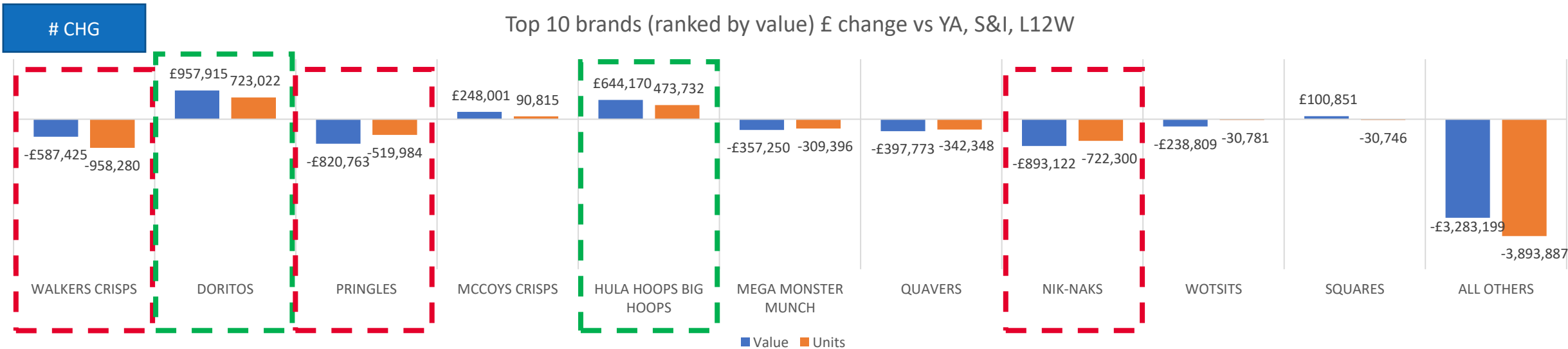
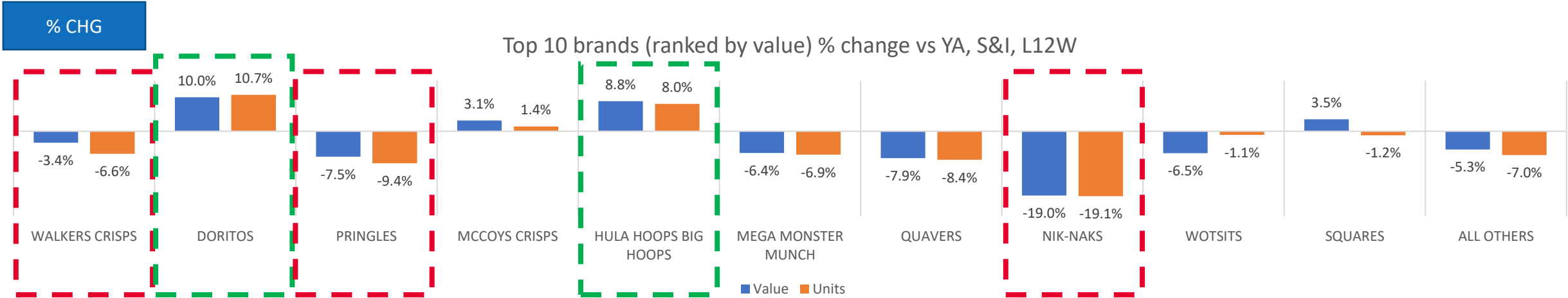


MANUFACTURER: A tough L12W across the board, with most suppliers in volume decline. Walkers and KP lead declines, with Private Label and Frito-Lay also suffering heavy losses (primarily in volume due to the over-index of Handypacks in S&I). Kellanova drives strong value and volume growth, notably through Cheez-Its launch. Barcel USA also drives volume growth.





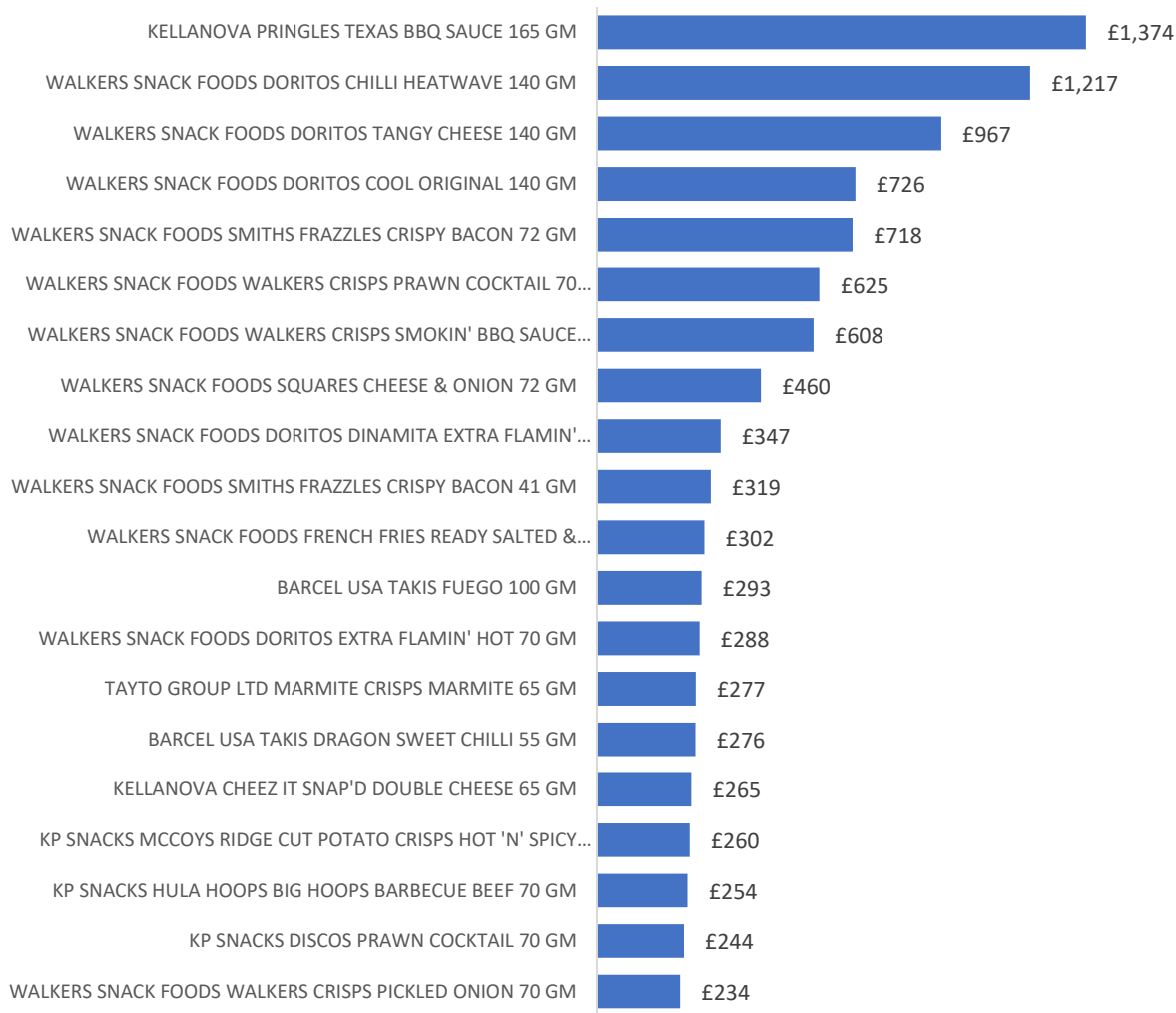
BRAND: Walkers Crisps and Nik-Naks are the key volume drainers, with Nik-Naks also leading value declines. Pringles suffers heavy losses despite a strong performance last month. Doritos, McCoys and Hula Hoops Big Hoops deliver value and unit growth. Overall, gains do not offset losses for both value and volume within the top 10.



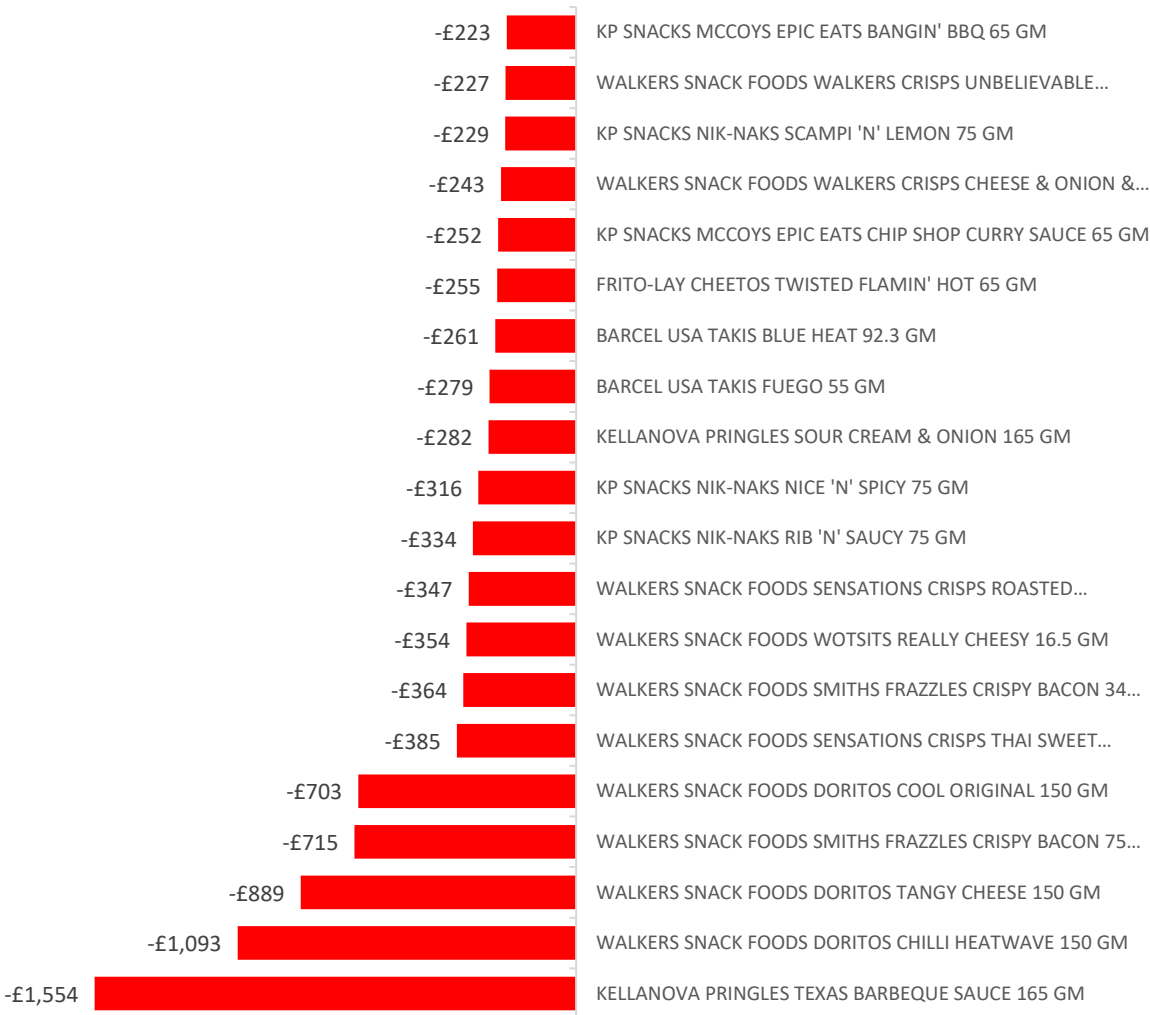


Walkers Prawn Cocktail, Smokin' BBQ Sauce and Squares Cheese & Onion drive sales, while Sensations Thai Sweet Chilli and Wotsits Really Cheesy drive decline. Top and bottom growth appears through a name change to Pringles Texas BBQ and weight changes to Doritos and other Walkers products (Frazzles).

Top 20 product drivers - L12W £000s






Bottom 20 product drivers - L12W £000s





Summary

In Summary

Market/Category	Insights	Actions
	<ul style="list-style-type: none"> For convenience retailers, value messaging will continue to be key to help deter shoppers' perception of being more expensive. Applying promotions like meal deals to drive spend will also allow shoppers to feel they are getting the most for their money. Convenience Shoppers expect Food to Go missions to be close to home, speedy and convenient Almost half of convenience visits are focused on Food-To-Go only 	<ul style="list-style-type: none"> Important to have variety of meal deal options, to meet a variety of shopper needs and drive value Use beacon brands to help signposting and drive the efficiency for a shopper Availability is key to shopper satisfaction – with better weather comes more opportunity!
	<ul style="list-style-type: none"> S&I sees underperformance vs other channels in the L4W. Unit losses come from Everyday Biscuits and Everyday Treats, with Oreo, Maryland, and Private Label driving the greatest unit declines. Innovation and ATL campaigns have driven strong performance within pladis, robusting value and volume growth within the number 1 manufacturer. Innovation can help meet shoppers' needs on-the-go. 	<ul style="list-style-type: none"> Special Treats have shown growth, so focus in this area drives additional value per unit sold. Increasing focus within this area, helps meet shoppers' need for quality and offers a trade-up. Gold Billions now moves into the Top 10 biscuit brands – capitalise on this brand and Flipz to meet increases in Food-to-Go and cross-category missions.
	<ul style="list-style-type: none"> A tough C&S period continues within Symbols & Indies. Whilst Kellanova increases through Cheez-Its, Pringles is now in decline. Walkers Crisps continue to decline, with additional declines for Nik Naks – potentially shifted to Takis sales? Sharing continues to grow within C&S. Handypacks suffer with S&I, with a potential switch across to Sharing and a focus on Sharing within innovation. 	<ul style="list-style-type: none"> Take advantage of all campaigns to excite shoppers – core campaigns as well as NPD signpost the category and create shopper interruption. Unlock increase Food-to-Go opportunities through including handypacks within Meal Deals.