

Executive Summary

OOH forecast to continue to grow into 2024 with summer of sport likely to help boost trade in many sectors

- OOH outperforms in Home in the UK seeing over double growth +18% vs +6% (Source: Take Home and OOH panels, Q1 2024, Worldpanel Division, Kantar)
- Globally OOH growth is driven by trips, while inflation slows in both IH and OOH indicating an organic recovery as trips grow. With Salty Snacks and Biscuits the fastest growing OOH categories in Q1 2024, as a response to the rising OTG Mission (Source: Take Home and OOH panels, Q1 2024, Worldpanel Division, Kantar Global results based on 9 markets: UK, Spain, Portugal, France, Brazil, Mexico, Mainland China, Thailand, India.)
- 2024 sees the UK eating out market exceed the £100 bn mark, year-on-year growth of 3.7%. However, not all sectors are equally affected; full-service restaurants will continue to struggle and lose share to QSRs due to the ongoing squeeze on consumers' discretionary spending. (IGD Research, 2024).
- Workplace has experienced a come-back with more days being worked in offices and employers using catering facilities as an incentive to entice their employees back.
- Visitor attractions (leisure) are seeing significant increases in visitor numbers year-on-year, driven by both an increase in inbound tourists and domestic day trips replacing staycations and holidays abroad for those that need, or choose, to prioritise spend elsewhere. (IGD Research, 2024).
- Pubs have performed better despite falling site numbers. A more casual way of socialising over drinks and snacks or sharing platters is appealing to cost-conscious consumers. A summer of sport will help boost trade across many sectors, notably pubs and QSR, in 2024. (IGD Research, 2024).

Channel - Crisps, Snacks & Nuts (L13wks)

At a Total Category level we see growth across all time periods. Though growth softens in L4wks after a strong year of growth. C&S growth slows +0.4% YOY with Premium growing +2.4% and Popcorn growing the fastest +18.4% despite being the smallest segment.

National Accounts (L13wks)

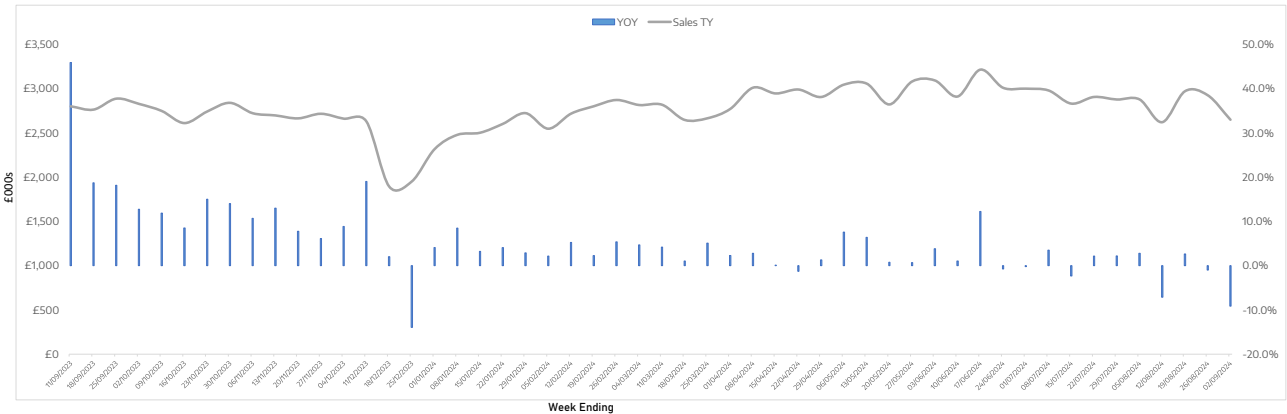
In the L13w, the category is growing +3%, with popcorn sees considerable growth and is outperforming +32% and Premium C&S grow +5%. Core C&S +1% and Nuts remains flat. KP is growing YOY +3%, in line with the total category. Walkers, Pladis, Kettle are underperforming whilst Pringles is the winning manufacturer growing +11%.

Freetrade

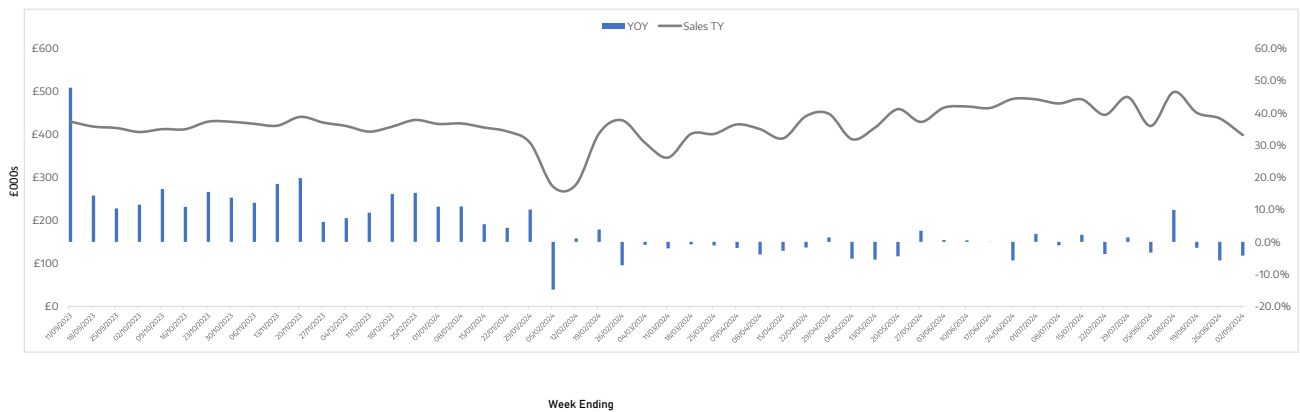
In Freetrade, Crisps & Snacks declines in L13wks and L4wks. Premium crisps is seeing sales decline in L4wks -3.5% however grows +1.3% in L13wks. Despite this they are a key driver of the channel as the largest proportion of Bagged Snacks at over 90% of sales. Popcorn also sees growth in this channel growing 4.4% and double that in the L4wks. Walkers, KP underperform at a slower rate than total category whilst Pladis and Kettle significantly underperform vs. total category. Pringles sees strong growth across all time periods ahead of the total category.

	Ltst MAT			YTD			Ltst 13 Wks			Ltst 4 Wks		
	Sales £m	Act Chg £m	YoY % Chg	Sales £m	Act Chg £m	YoY % Chg	Sales £m	Act Chg £m	YoY % Chg	Sales £m	Act Chg £m	YoY % Chg
Total	£144.1	£6.8	4.9%	£103.2	£2.2	2.2%	£37.8	£0.2	0.4%	£11.2	£-0.4	-3.6%
Crisps & Snacks	£95.1	£3.8	4.1%	£67.9	£1.0	1.5%	£24.5	£-0.2	-0.7%	£7.3	£-0.2	-3.3%
Premium C&S	£27.9	£1.5	5.6%	£20.1	£0.5	2.5%	£7.5	£0.2	2.4%	£2.2	£-0.1	-4.8%
Popcorn	£3.5	£0.4	11.7%	£2.5	£0.3	13.1%	£0.9	£0.1	18.4%	£0.3	£0.0	12.2%
Nuts	£12.2	£0.5	4.0%	£8.7	£0.0	0.1%	£3.3	£0.0	0.3%	£1.0	£-0.1	-7.2%
Fruit & Nuts	£1.2	£0.1	5.8%	£0.8	£0.1	6.8%	£0.3	£-0.0	-2.4%	£0.1	£-0.0	-3.9%
Meat & Other Dips	£4.3	£0.6	17.3%	£3.1	£0.3	11.9%	£1.2	£0.0	2.0%	£0.4	£-0.0	-3.9%

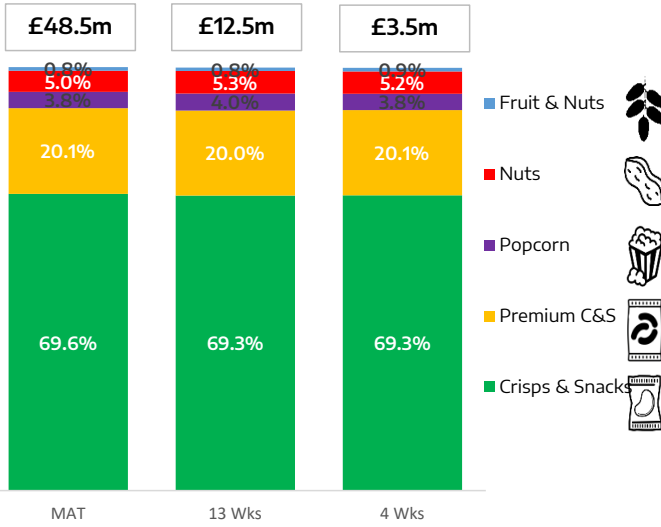
Total Crisps, Snacks and Nuts - Foodservice Weekly Trends - Booker, Brakes and Bidfood Combined



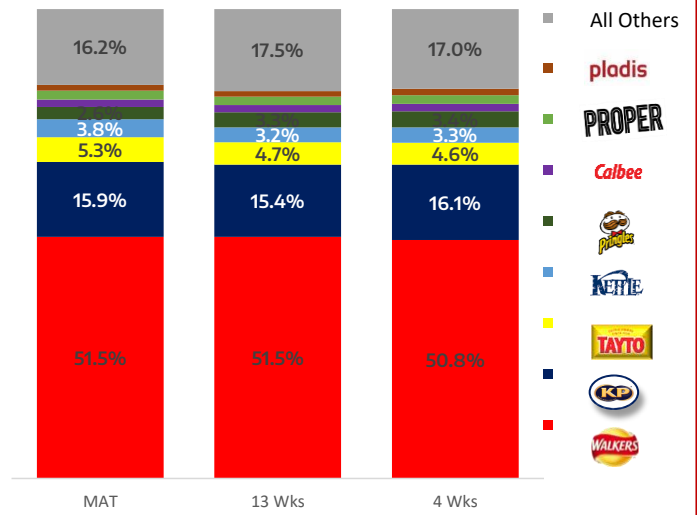
KP - Foodservice Weekly Trends - Booker, Brakes and Bidfood Combined



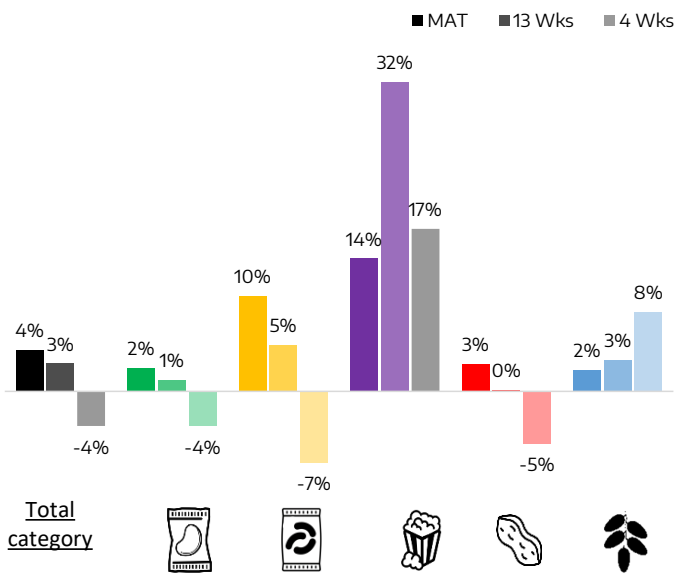
Sub Category Value % Share of Trade



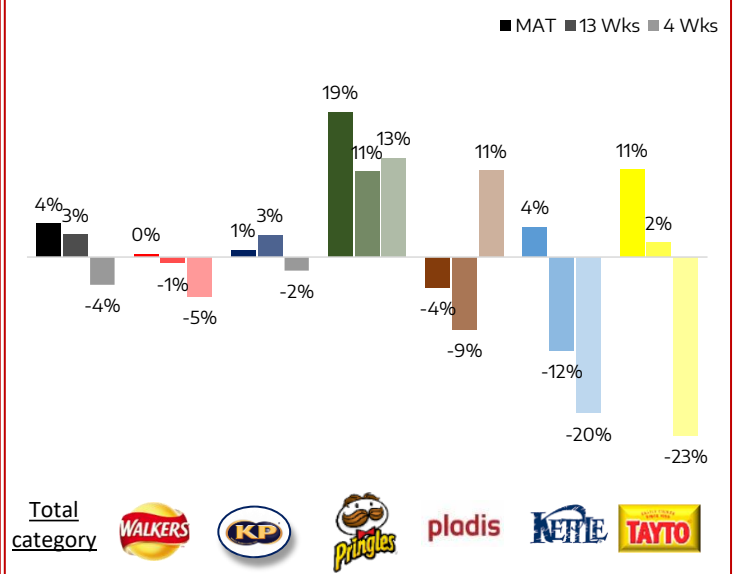
Key Manufacturers Value % Share of Trade



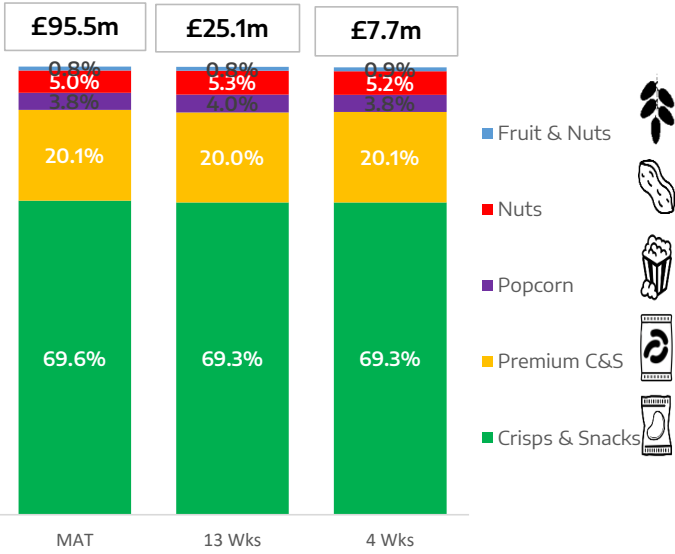
Sub Category YoY % Chg



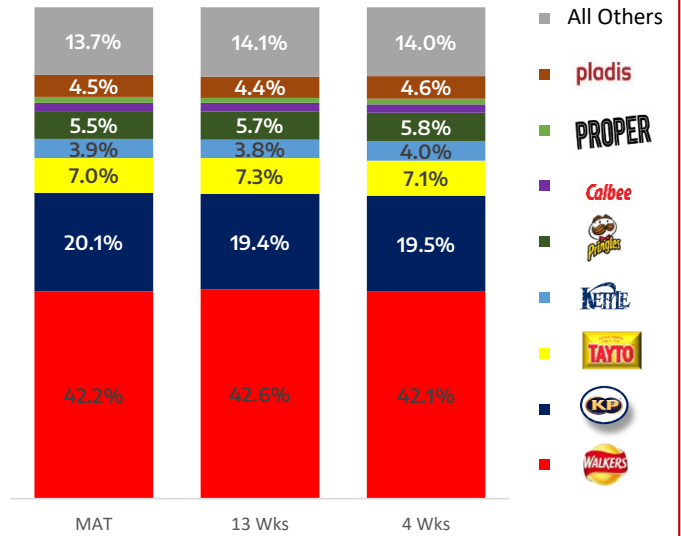
Manufacturer YoY % Chg



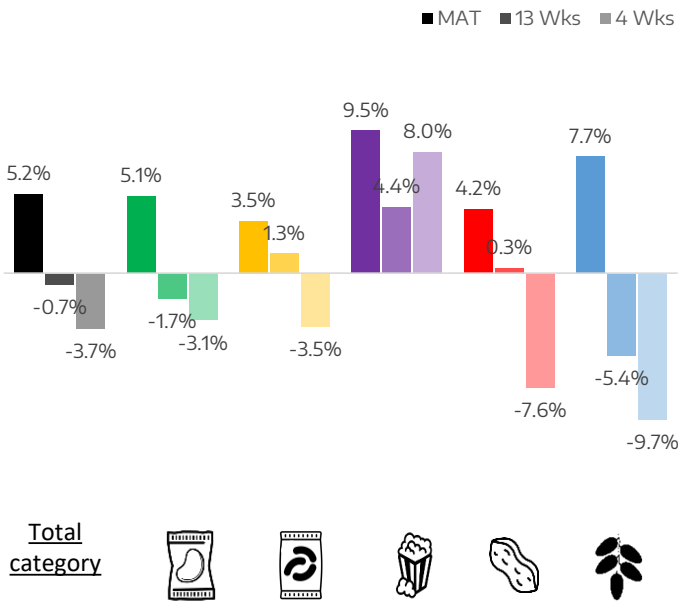
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Key Manufacturers Value % Share of Trade



Sub Category YoY % Chg



Manufacturer YoY % Chg

