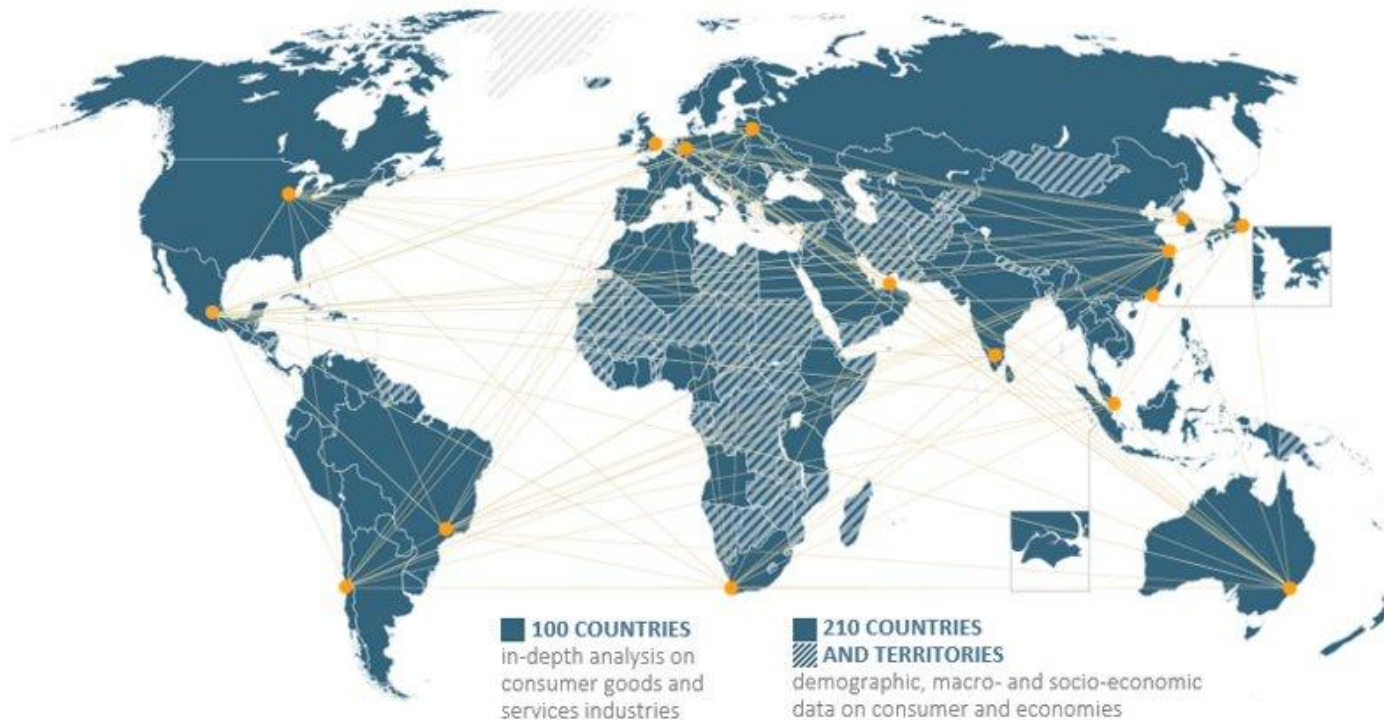


UK savoury snacks market trends

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Overview

- 1 Overview of savoury snacks in the UK
- 2 Overview of processed potato products in the UK
- 3 Key trends driving the market in 2025
- 4 Forecast drivers and opportunities for growth

Overview of savoury snacks in the UK

United Kingdom is largest market in Europe



#1: United Kingdom

#2: Germany

#3: France

**7.9kg per
person**

Average per capita
consumption of savoury
snacks* in the UK in 2024

23% of savoury snacks* sales in Europe are sold in the UK in 2024
(£7 Billion retail value RSP)

Source: Passport Snacks 26ed *excluding nuts, seeds and trial mixes

Potato chips maintain market leadership



44%

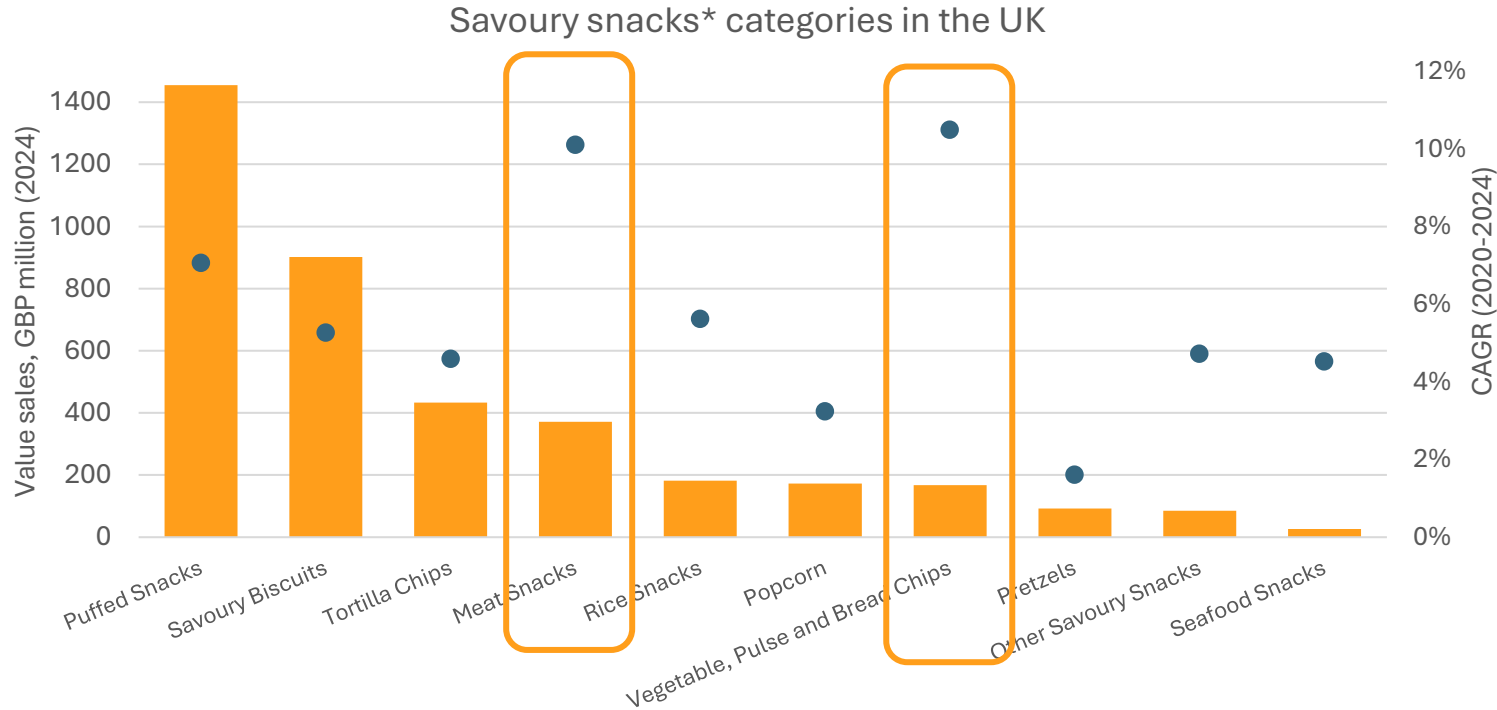
of savoury snacks* retail
value share in 2024
(£3 Billion in retail value RSP)

**2.7kg per
person**

Average per capita
consumption of potato
chips in the UK in 2024

Source: Passport Snacks 26ed *excluding nuts, seeds and trial mixes

Vegetable, pulse and bread chips and meat snacks driving growth in the last years



Source: Passport Snacks 26ed *excluding nuts, seeds and trial mixes



Source: company website

Eat Real launches new plant-based lines and updated pack design

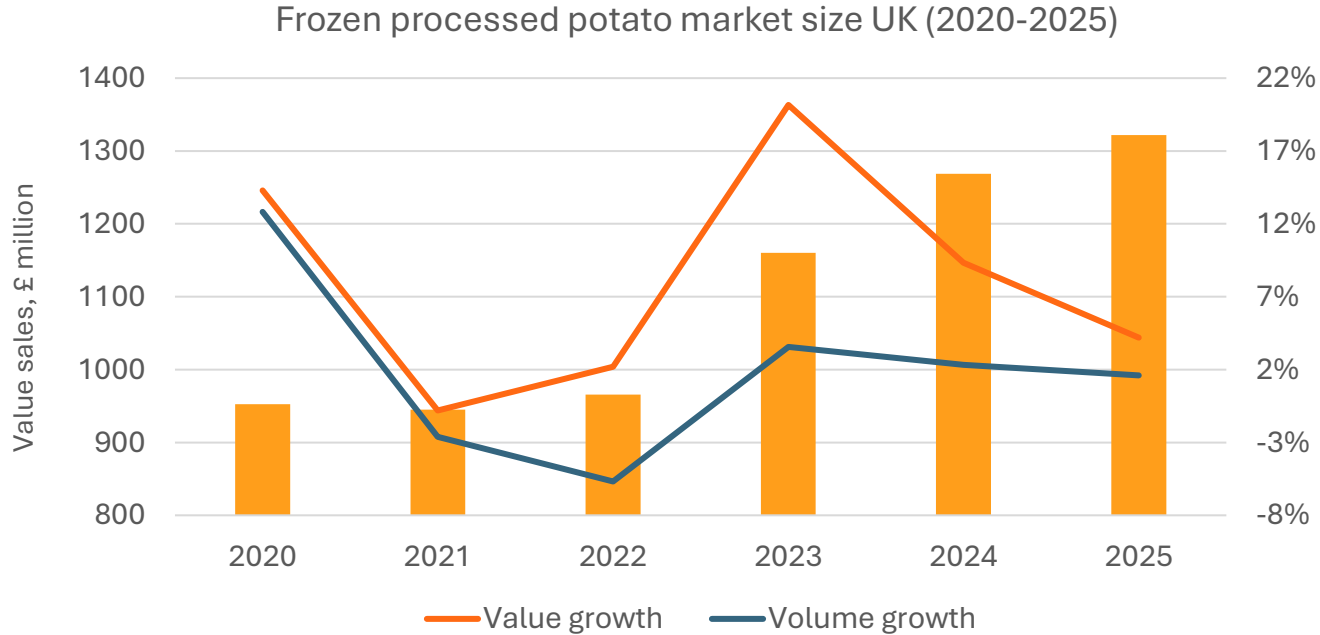


Source: company website

Mr Porcky launches a lighter alternative to pork scratchings

Overview of frozen processed potato in the UK

Momentum builds on affordability and convenience



6.8kg per person

Average per capita consumption of frozen processed potatoes in the UK in 2024

Source: Passport Staple Foods 26ed

Private label share growth normalises as prices stabilise

Company shares in frozen processed potato UK in 2024



Source: company website
McCain launched a new frozen potato snack



Source: company website
Seabrook expands into frozen processed potato with classic crisps flavours

Source: Passport Staple Foods 26ed

Key trends driving the market in 2025

Cost sensitivity in a post-inflation landscape



Flavour exploration from global to local



Evolving health landscape in snacking

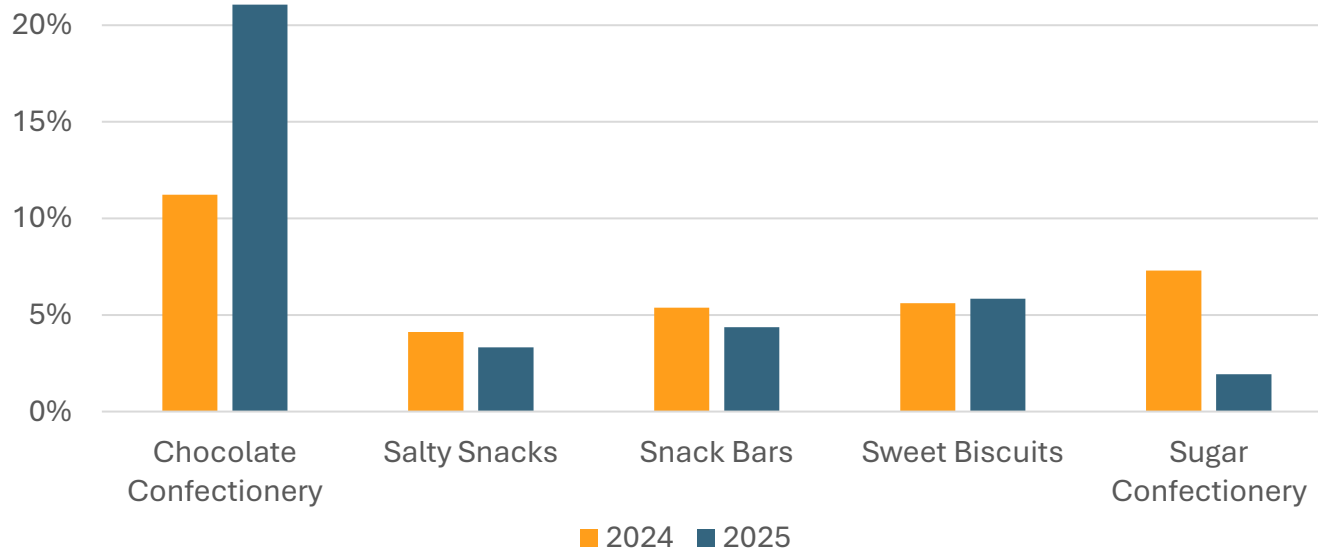


Cost sensitivity in a post-inflation landscape



Salty snacks see moderate pricing in 2024

2025 VS 2024 Price changes for snack categories (UK)



3.2%

Expected average unit price growth in **2025** for salty snacks

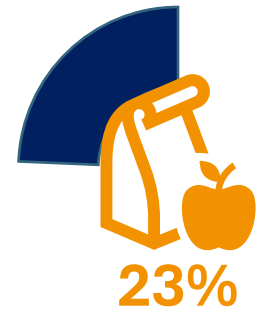
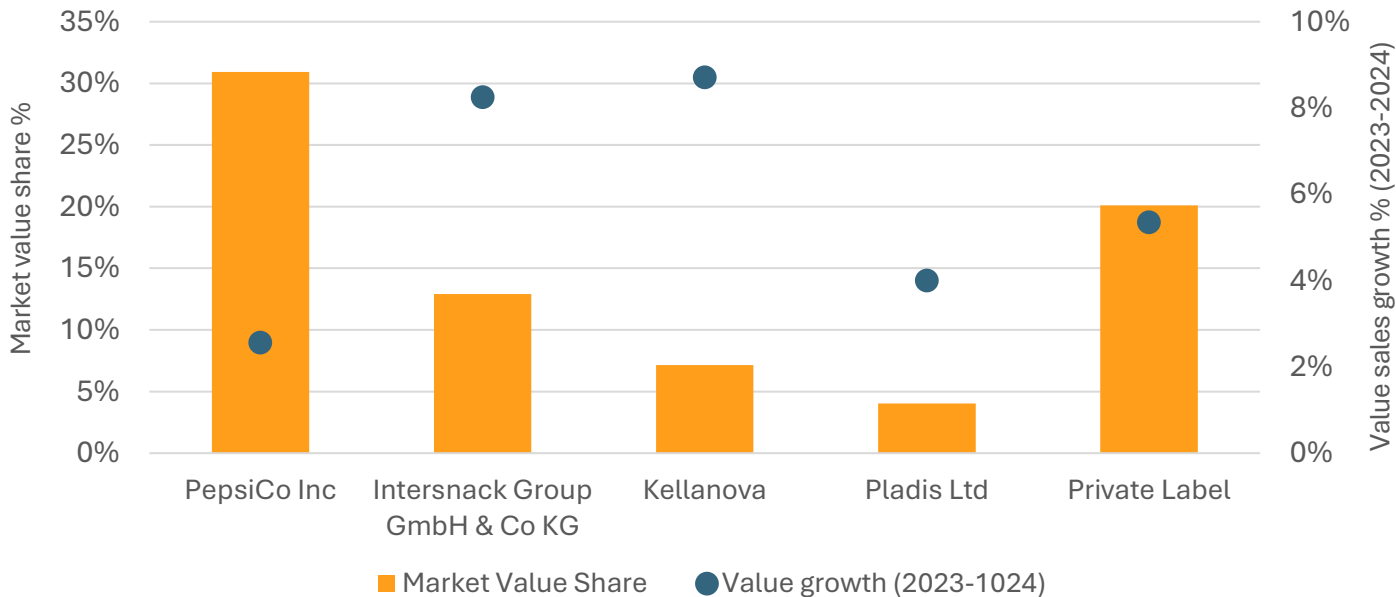
1.1%

Expected volume sales growth in **2025** for salty snacks

Source: Passport Snacks 26ed

Private label's enduring role amid cost pressures

Leading company shares in savoury snacks* UK in 2024



23% of UK consumers intend to increase their purchase of private labels in the next 12 months

Source: Passport Snacks 26ed *excluding nuts, seeds and trial mixes

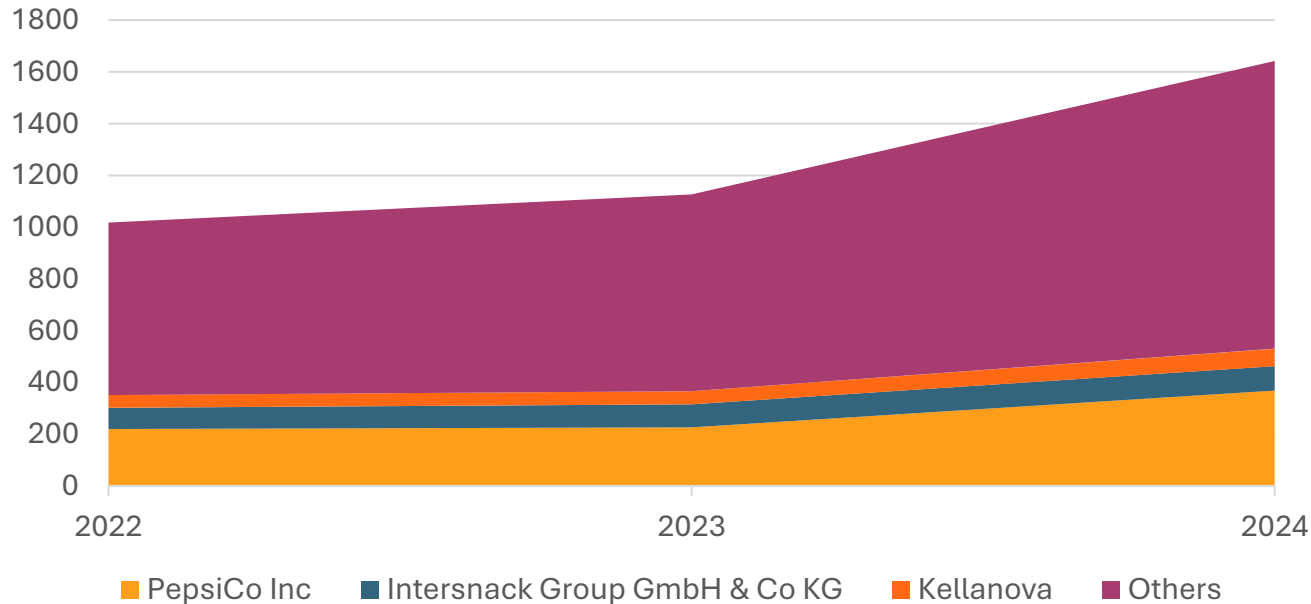
Source: Euromonitor lifestyle survey 2025, n=915, fielded in Jan to Feb 2025

Flavour exploration from global to local



Traveling taste: Spicy flavours

Evolution of spicy SKUs in savoury snacks UK (2022-2024)



Source: company website

Jacob's Mini Cheddars
collaborated with Frank's
Red Hot sauce

Source: Euromonitor VIA SKU Tracker

International flavours drive savoury snacks flavour innovation



Source: company website

Walkers UK launched 2 new flavours: Sticky Teriyaki and Masala Chicken



Source: Tesco.com

Tesco released Japanese-inspired fried chicken products

+45%

Increase in SKUs for global cuisines in UK packaged food from 2022-2024

Source: Euromonitor VIA SKU Tracker; SKUs that include word China, India, Japan, Korea in their description.

Tapping into local taste and seasonality



Source: company website

Walkers UK relaunched the Worcester Sauce crisps in 2025



Source: company website

Tyrrell's teams up with British series Downton Abbey to launch limited edition flavour



Source: company website

Pringles most recent mystery flavour released for the Christmas season

Evolving health landscape in snacking



Evolution of health and wellness trends



26%

of UK consumers closely read the nutrition labels of food and beverage in 2025

Top consumer welfare attributes

% willing to pay a premium for attribute

Health and nutritional properties (e.g. omega-3)

20%

Superior Taste

19%

All Natural

17%

Source: Euromonitor Lifestyle Survey 2025, fielded in Jan to Feb 2025, n=1003, n=1010

Functional claims in savoury snacks



Source: company website

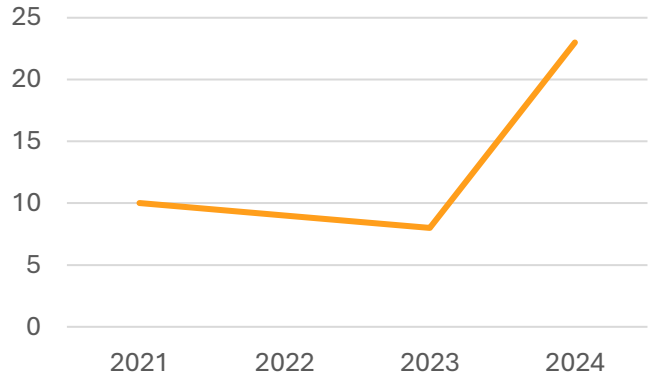
The Curators UK have had several new protein snack launches in 2025, including protein chips and limited-edition Tajín-flavoured pork puffs



Source: company website

Khloé Kardashian launches **Khlood Protein Popcorn** in the US, claims to contain 3 times amount of protein than regular popcorn

New products with "High Protein" claims
of Launches



Source: Euromonitor Innovation tracker; UK snack categories (salty snacks, savoury biscuits)

HFSS and industry reformulations



Volume-based promotion restrictions are already live and the next big shift will be on advertising restrictions from January 2026



Source: company website

Walkers has almost halved the salt content across its popular flavours including Salt & Vinegar, Prawn Cocktail and Smoky Bacon, making them HFSS-compliant



Source: company website

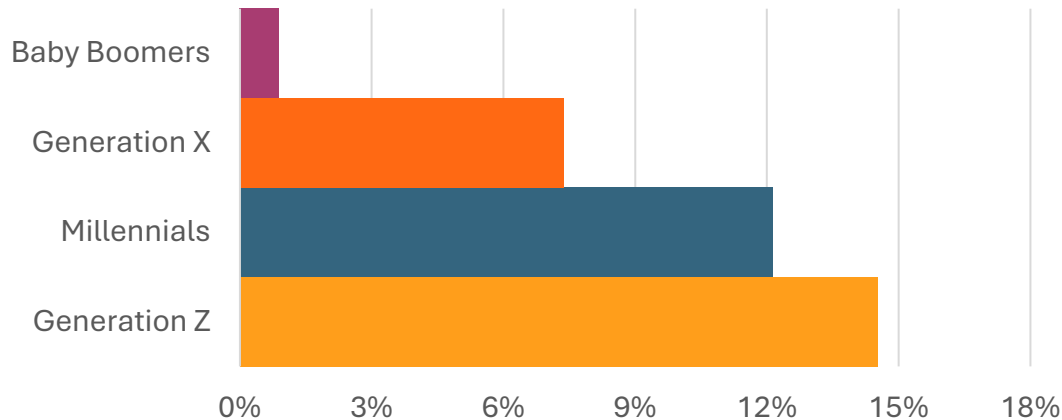
Pringles latest non-HFSS flavour includes new Blazin' Fried Chicken flavour in the UK

Forecast drivers and opportunities for growth

Positive forecast and expansion of snacking occasions

“I eat a lot of snacks in between meals”

% of UK consumers



Source: company website

PROPER Snacks and Netflix teamed up to launch a pillow-sized pack of sweet and salty popcorn

Source: Euromonitor Voice of the Consumer: Health and Nutrition Survey, fielded in Feb 2025 (n=1002)

Thank you



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