



# Competitor Strategies in Snacks

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## INTRODUCTION

Scope

Key snacks market strategies

Key findings

## COMPETITIVE LANDSCAPE

Ferrero and Nestlé swap rank, Mars to see Kellanova boost, and Lindt rises to top 10

Big M&A moves expected to consolidate and reshape the snacks industry's top ranks

Strategic industry actions and consumers' resilient value in snacks drives more growth

More purposeful actions are needed in a time when value scrutiny is elevated

Leading players lean into unique strategies to make their snacks share robust

Manufacturers boost brand investment and upbrand in view of affordability concerns

Some shake-up to the industry top 10 is expected for a number of players

## TOP FIVE MARKET PLAYERS

PepsiCo's modernisation strategy spans across its branding, products, and marketing

PepsiCo advances cultural snacking and health and wellness strategy to maintain lead

Mondelez ranks second in overall snacking with a strong brand portfolio and footprint

The company's category focus, omnipresence, and pack strategy hold its strong share

Mars maintains its leading industry rank with potentially stronger play in the future...

...finding premium pockets and driving cultural and holistic snacking strategies

Ferrero continues to grow industry share, in part through strategic acquisitions

The company is also backing its biggest brands and markets with strong innovation

Nestlé's Kit Kat and self-named brand drive growth for the company

Nestlé is also increasing marketing spend and tightening its innovation funnel

## INDUSTRY LEADER STRATEGIES

The Magnum Ice Cream Company, now as its own entity, set to push ice cream growth

Hershey's sweet and salty portfolio impacted by pricing, wellness, and shopper shifts

Kellanova and Lindt hold category leadership ranks – driving category growth

Lindt and General Mills act on the need for levelled-up productivity

## APPENDIX

Projected company sales: FAQs

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