



Passport

Savoury Snacks in France

Euromonitor International

July 2021

This sample report is for illustration
purposes only.

Some content and data have been
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SAVOURY SNACKS IN FRANCE - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Continued home seclusion in 2021 supports the demand for savoury snacks

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Virtual apéro culture booms

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Consumer demand for “made in France” products grows

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PROSPECTS AND OPPORTUNITIES

Flavour innovation will drive growth in the forecast period as local demand for French savoury snacks grows

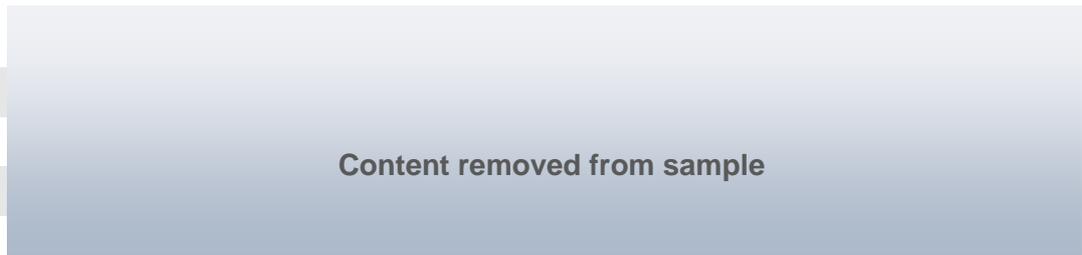
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Vegetable, pulse and bread chips will benefit from A move towards healthier savoury snacks

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Adoption of Nutriscore will lead to the launch of healthier offerings

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

CATEGORY DATA

Table 1 Sales of Savoury Snacks by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Nuts, Seeds and Trail Mixes	Data removed from sample					
Salty Snacks						
- Potato Chips						
- Tortilla Chips						
- Puffed Snacks						
- Rice Snacks						
- Vegetable, Pulse and Bread Chips						
Savoury Biscuits						
Popcorn						
Pretzels						
Other Savoury Snacks						
Savoury Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Savoury Snacks by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Nuts, Seeds and Trail Mixes	Data removed from sample					
Salty Snacks						
- Potato Chips						
- Tortilla Chips						
- Puffed Snacks						
- Rice Snacks						
- Vegetable, Pulse and Bread Chips						
Savoury Biscuits						
Popcorn						
Pretzels						
Other Savoury Snacks						
Savoury Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Savoury Snacks by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Nuts, Seeds and Trail Mixes	Data removed from sample		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			
- Vegetable, Pulse and Bread Chips			
Savoury Biscuits			
Popcorn			
Pretzels			
Other Savoury Snacks			
Savoury Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Savoury Snacks by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Nuts, Seeds and Trail Mixes	Data removed from sample		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			
- Vegetable, Pulse and Bread Chips			
Savoury Biscuits			
Popcorn			
Pretzels			
Other Savoury Snacks			
Savoury Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Savoury Snacks: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

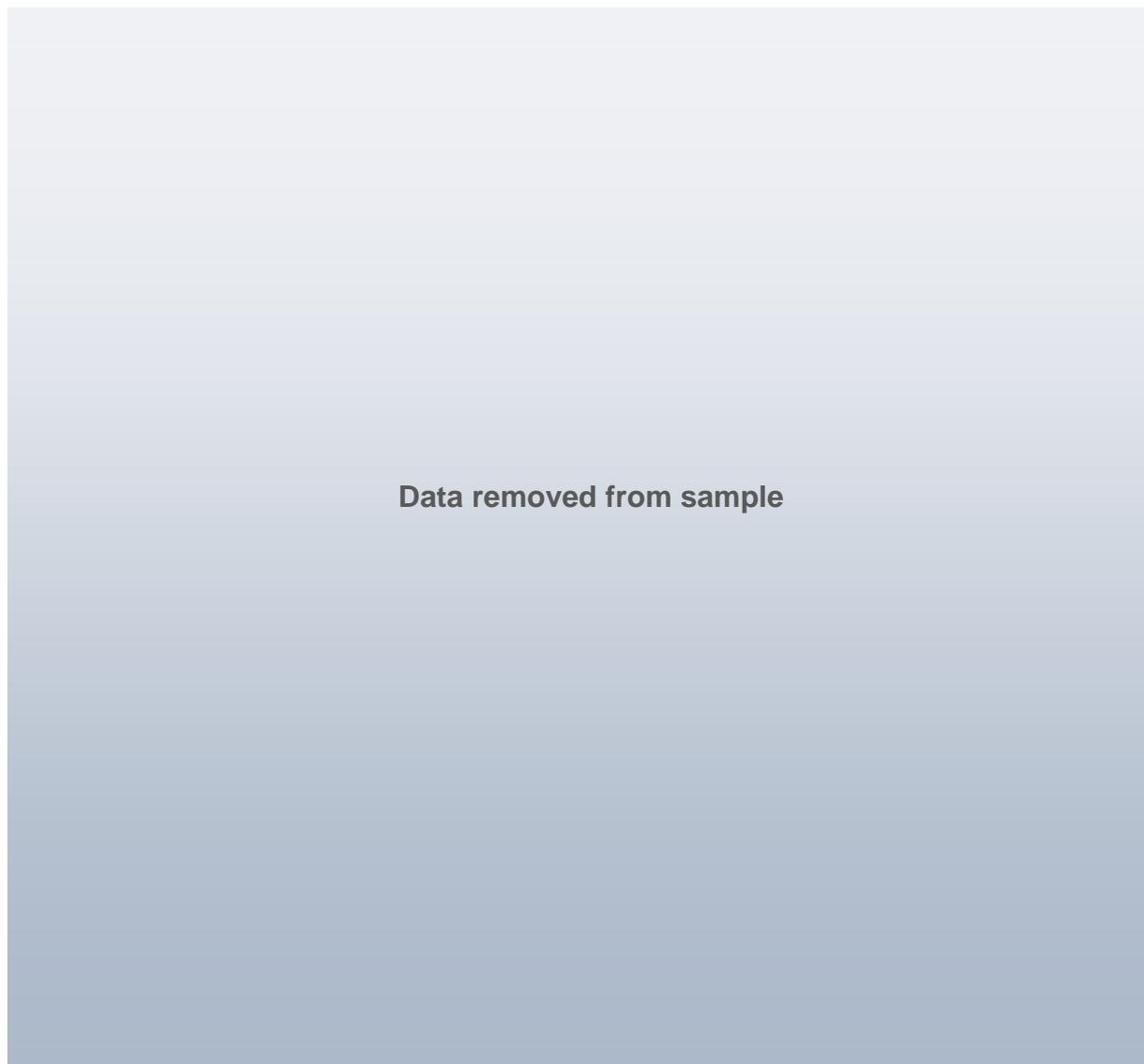
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Savoury Snacks: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 **Distribution of Savoury Snacks by Format: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						

- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Savoury Snacks by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
Nuts, Seeds and Trail Mixes	Data removed from sample					
Salty Snacks						
- Potato Chips						
- Tortilla Chips						
- Puffed Snacks						
- Rice Snacks						
- Vegetable, Pulse and Bread Chips						
Savoury Biscuits						
Popcorn						
Pretzels						
Other Savoury Snacks						
Savoury Snacks						

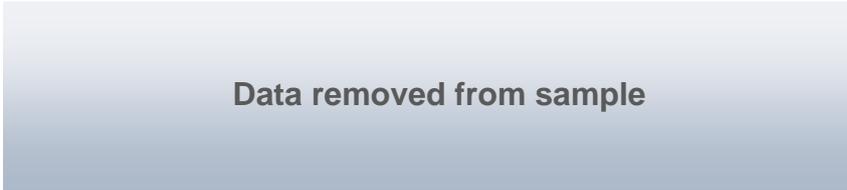
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Savoury Snacks by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Nuts, Seeds and Trail Mixes	Data removed from sample					
Salty Snacks						
- Potato Chips						
- Tortilla Chips						
- Puffed Snacks						
- Rice Snacks						

- Vegetable, Pulse and Bread Chips
- Savoury Biscuits
- Popcorn
- Pretzels
- Other Savoury Snacks
- Savoury Snacks



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2021-2026

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
Nuts, Seeds and Trail Mixes	Data removed from sample		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			
- Vegetable, Pulse and Bread Chips			
Savoury Biscuits			
Popcorn			
Pretzels			
Other Savoury Snacks			
Savoury Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Savoury Snacks by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Nuts, Seeds and Trail Mixes	Data removed from sample		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			
- Vegetable, Pulse and Bread Chips			
Savoury Biscuits			
Popcorn			
Pretzels			
Other Savoury Snacks			
Savoury Snacks			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SNACKS IN FRANCE - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Snacks in 2021: The big picture

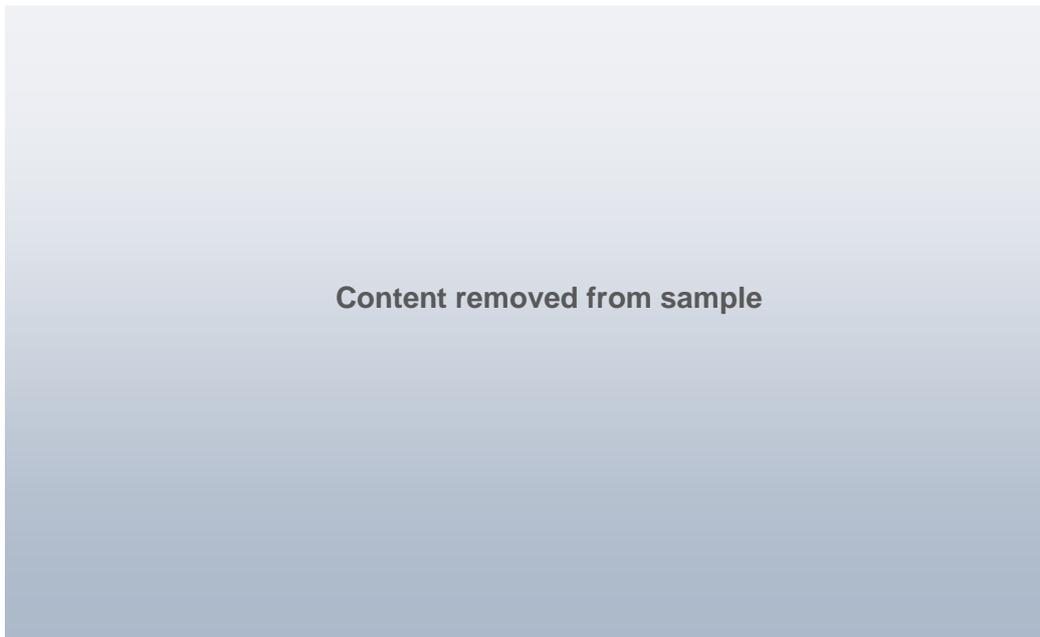
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Key trends in 2021

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Competitive landscape

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What next for snacks?

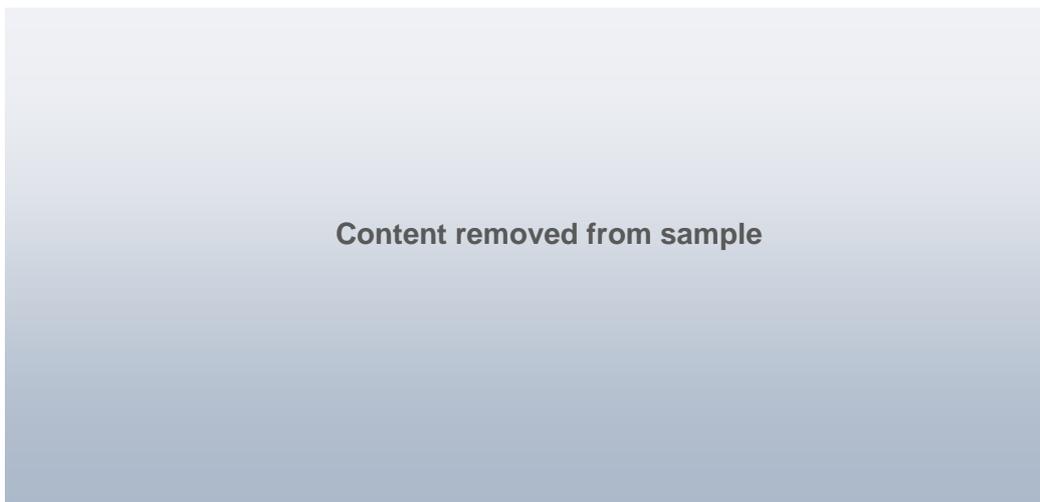


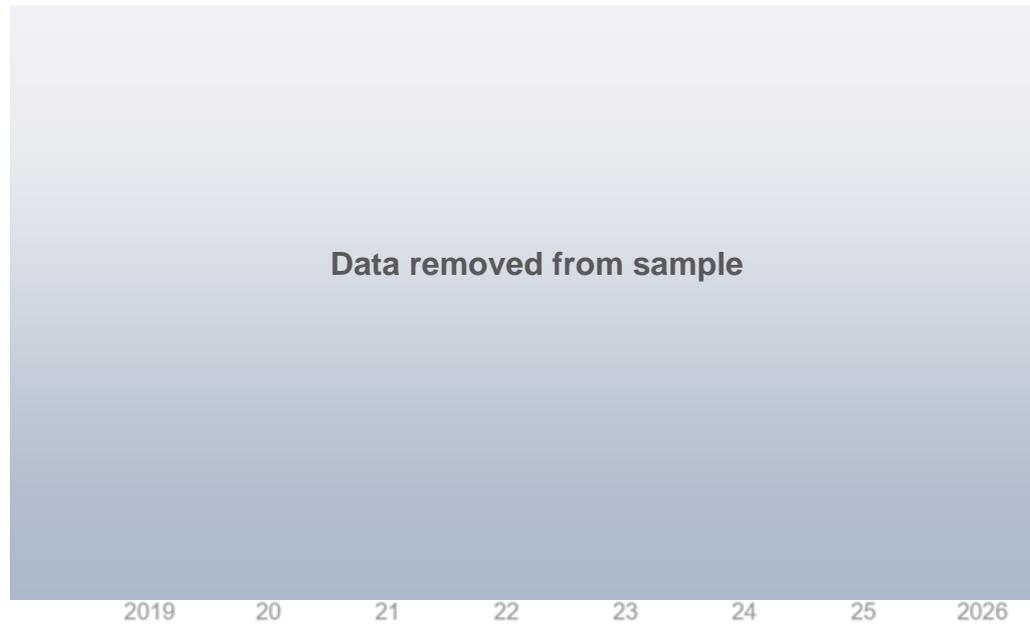
Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Snacks - France

Passport Baseline C19 Pessimistic1



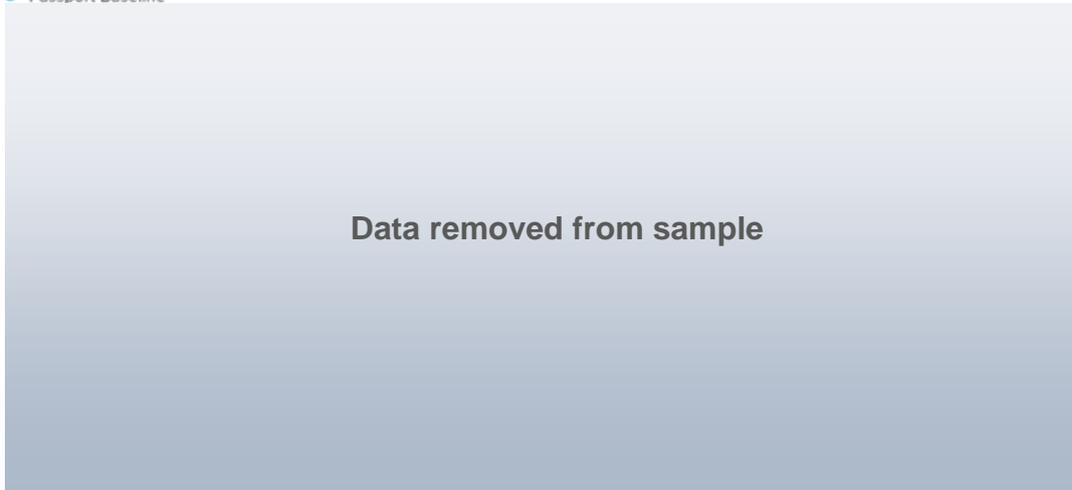
Source: Euromonitor International Industry Forecast Model

Chart 2 Snacks Impact of Drivers on Value Sales: 2019-2026

Retail Value Sales, Real US\$ mn 2019 - 2026
 2021 Constant Prices, 2021 Fixed Year Exchange Rate

France - Snacks

Retail Value Sales, Real Growth
 Passport Baseline



Source: Euromonitor International Industry Forecast Model

MARKET DATA

Table 12 Sales of Snacks by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen						
Desserts						
Savoury Snacks						
Sweet Biscuits, Snack						
Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Snacks by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen						
Desserts						
Savoury Snacks						
Sweet Biscuits, Snack						
Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Snacks by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	Data removed from sample		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Snacks by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	Data removed from sample		
Ice Cream and Frozen Desserts			
Savoury Snacks			
Sweet Biscuits, Snack Bars and Fruit Snacks			
Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 NBO Company Shares of Snacks: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

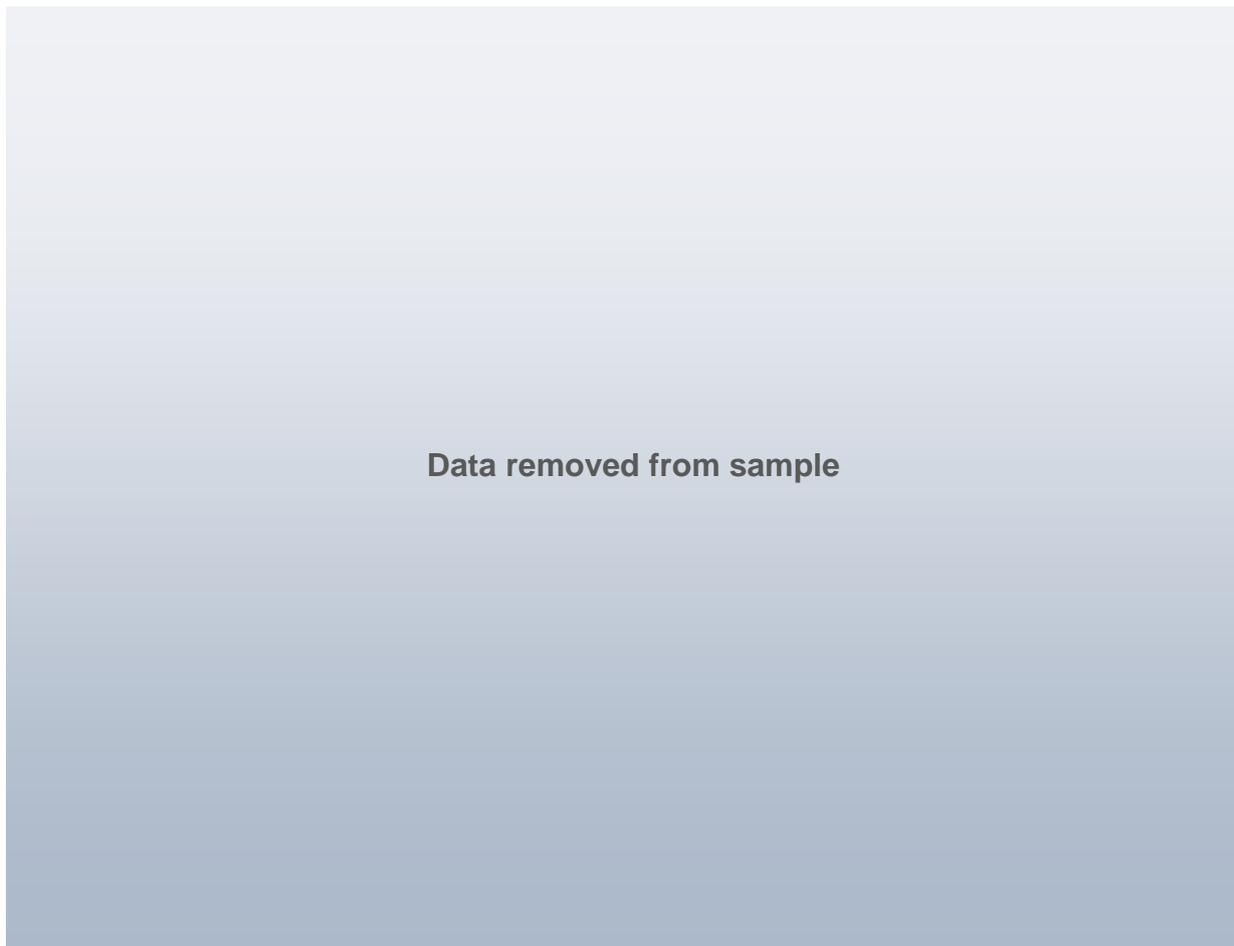
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 LBN Brand Shares of Snacks: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Confectionery	Data removed from sample					
Ice Cream and Frozen						
Desserts						
Snacks						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Snacks by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
-- Other Foods Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Forecast Sales of Snacks by Category: Volume 2021-2026

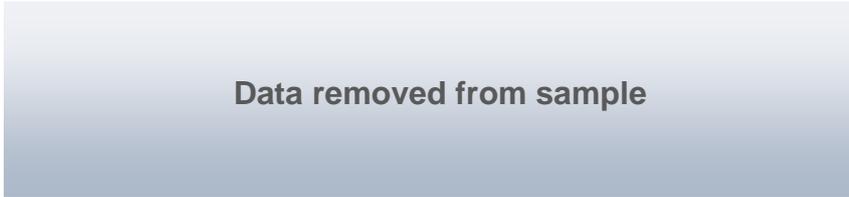
'000 tonnes	2021	2022	2023	2024	2025	2026
Confectionery	Data removed from sample					
Ice Cream and Frozen Desserts						
Savoury Snacks						
Sweet Biscuits, Snack Bars and Fruit Snacks						
Snacks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Snacks by Category: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
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Confectionery
Ice Cream and Frozen
Desserts
Savoury Snacks
Sweet Biscuits, Snack
Bars and Fruit Snacks
Snacks



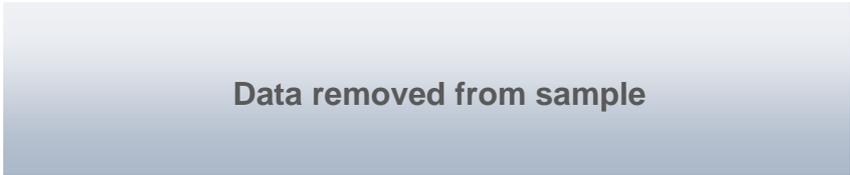
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Snacks by Category: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

Confectionery
Ice Cream and Frozen Desserts
Savoury Snacks
Sweet Biscuits, Snack Bars and Fruit
Snacks
Snacks



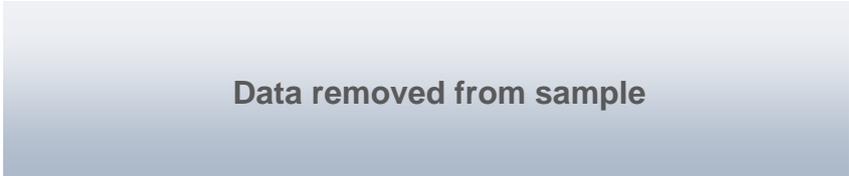
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Sales of Snacks by Category: % Value Growth 2021-2026

% constant value growth

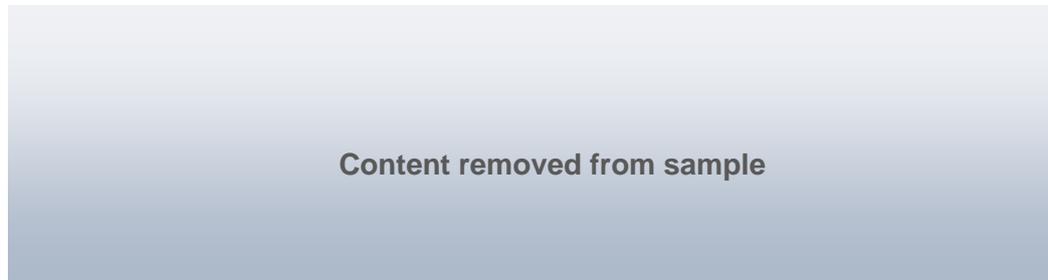
2021/2022 2021-26 CAGR 2021/26 Total

Confectionery
Ice Cream and Frozen Desserts
Savoury Snacks
Sweet Biscuits, Snack Bars and Fruit
Snacks
Snacks



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER



SOURCES

Sources used during research include the following:

Summary 2 Research Sources

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