



# Passport

## Snacks in Italy

Euromonitor International

July 2021

This sample report is for illustration  
purposes only.

Some content and data have been  
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# SNACKS IN ITALY - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Snacks in 2021: The big picture

The COVID-19 pandemic will continue to have a mixed impact on snacks in Italy in 2021. The consumption patterns that were formulated in 2020 are set to be repeated in 2021, albeit to a lesser extent, as the restrictions will be more relaxed allowing consumers to spend more time outside the home for both professional and leisure purposes. This will lead to an increase in impulse purchases – a factor which several snacks categories are heavily dependent upon - with retail sales of snack bars especially benefitting from increased consumption on-the-go as well as during sports and exercise. Impulsivity is a particularly strong sales driver in ...

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Meanwhile, the indulgence trend that was observed in 2020 is anticipated to remain strong in 2021, albeit somewhat moderated by the increased time spent outside the home. Nevertheless, as consumers have shifted many of their activities to the home...

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### Key trends in 2021

The pandemic has accelerated the growth of the health and wellness trend in Italy and has raised awareness of the importance of nutrition in immunity and general wellbeing. For this reason, snacks that are perceived as healthy, such as vegetable, pulse and bread chips, continue to record growth...

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### Competitive landscape

Barilla Alimentare, as the number one player in savoury snacks and sweet biscuits, continues to lead snacks in Italy. Although it has been challenged by the successful launch of Nutella Biscuits in sweet biscuits...

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Barilla Alimentare's leadership is expected to be cemented by consumers becoming increasingly interested in supporting domestic production...

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### Channel developments

In 2021, there is expected to be a slowdown in the retail sales of snacks as foodservice starts to recover. In the first months of 2021, despite lockdown restrictions being implemented at regional levels in Italy, foodservice venues were allowed to remain open under restricted capacities...

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### What next for snacks?

Over the forecast period, the trend towards health and wellness is expected to drive growth of snacks. As consumers are becoming increasingly aware of how nutrition affects immunity and general wellbeing...

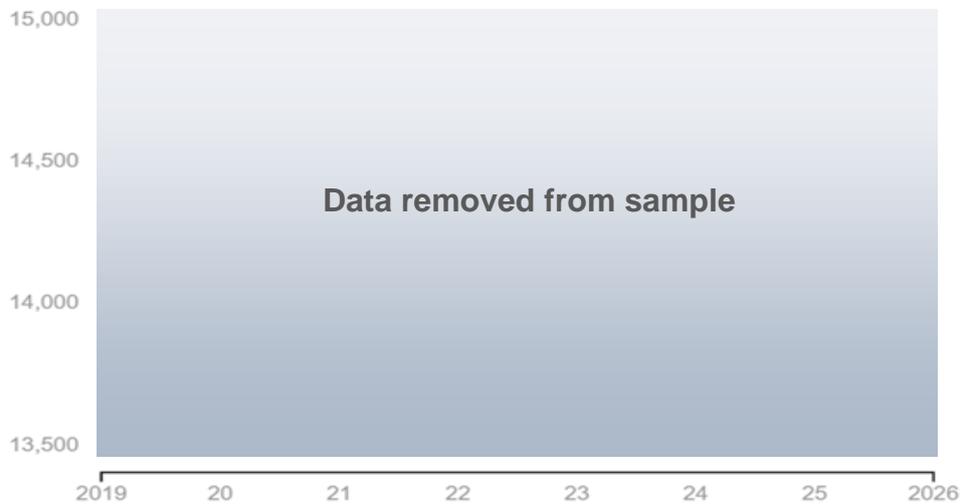
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**Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026**  
**Retail Value Sales, Real, US\$ mn, 2019 - 2026**

2021 Constant Prices, 2021 Fixed Year Exchange Rate

**Snacks - Italy**

Passport Baseline C19 Pessimistic1



Source: Euromonitor International Industry Forecast Model

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

**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

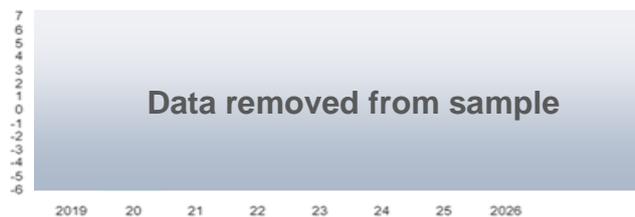
**Italy - Snacks**

**Retail Value Sales, Real Growth**

Passport Baseline

**Driver effects**

- GDP Per Capita
- Product Price
- Habit Persistence
- Population
- Socio-Economic Trends  
(Share of Population with Higher Education; Share of Vegetarian Population)
- Market Environment  
(Grocery Outlets; Per Capita expenditure on HW Packaged Food Products)
- Soft Drivers  
(- Competition; - Maturity of sector; + Availability; + Lifestyle trends; + Product variety; + Promotion)



Source: Euromonitor International Industry Forecast Model

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

## MARKET DATA

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

'000 tonnes	2016	2017	2018	2019	2020	2021
Confectionery	<b>Data removed from sample</b>					
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 2 Sales of Snacks by Category: Value 2016-2021**

EUR million	2016	2017	2018	2019	2020	2021
Confectionery	<b>Data removed from sample</b>					
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 3 Sales of Snacks by Category: % Volume Growth 2016-2021**

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	<b>Data removed from sample</b>		
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 4 Sales of Snacks by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Confectionery	<b>Data removed from sample</b>		
Ice Cream and Frozen Desserts			
Savoury Snacks			

Sweet Biscuits, Snack Bars and Fruit  
 Snacks  
 Snacks

**Data removed from sample**

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

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

% retail value rsp Company	2017	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 6 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 7** Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Confectionery	<b>Data removed from sample</b>					
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 8** Distribution of Snacks by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 9 Forecast Sales of Snacks by Category: Volume 2021-2026**

'000 tonnes	2021	2022	2023	2024	2025	2026
Confectionery	<b>Data removed from sample</b>					
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 10 Forecast Sales of Snacks by Category: Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Confectionery	<b>Data removed from sample</b>					
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 11 Forecast Sales of Snacks by Category: % Volume Growth 2021-2026**

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Confectionery	<b>Data removed from sample</b>		
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 12 Forecast Sales of Snacks by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Confectionery	<b>Data removed from sample</b>		
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

Forecast and scenario closing date: 14 June 2021

Report closing date: 7 July 2021

Analysis and data in this report give full consideration to consumer behaviour and category performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on [www.euromonitor.com](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

## SOURCES

Sources used during research include the following:

### Summary 1 Research Sources

Official Sources

Trade Associations

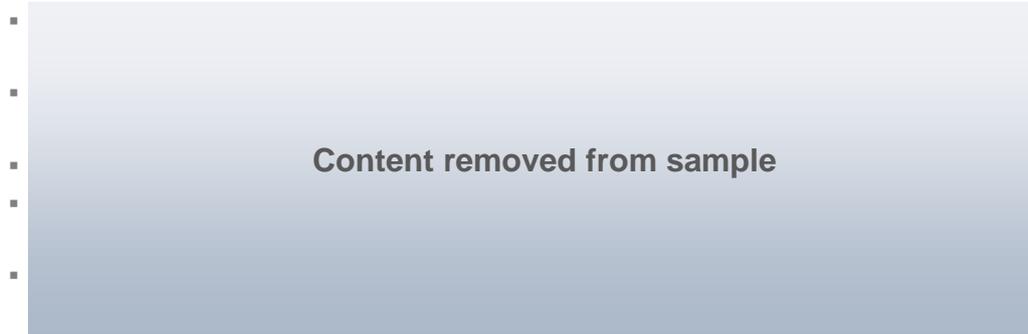
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Source: Euromonitor International

# CHOCOLATE CONFECTIONERY IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

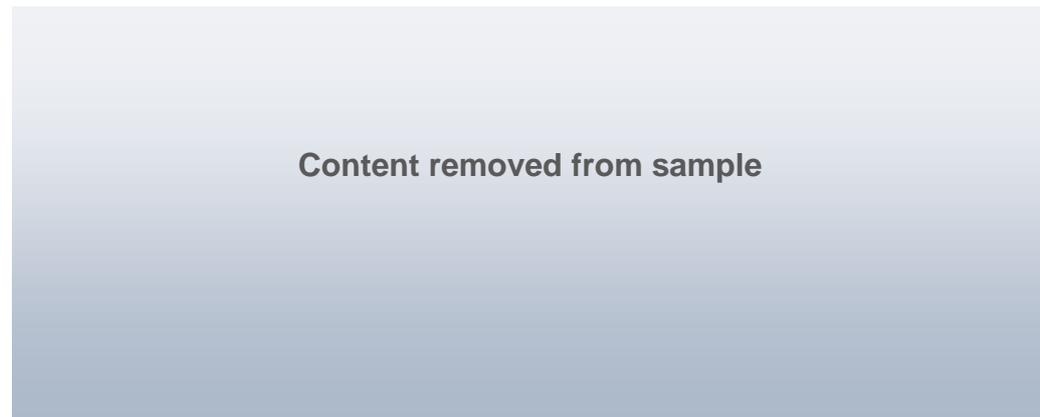
- Fewer restrictions on festive celebrations to increase demand for seasonal chocolate and chocolate with toys in 2021



## 2021 DEVELOPMENTS

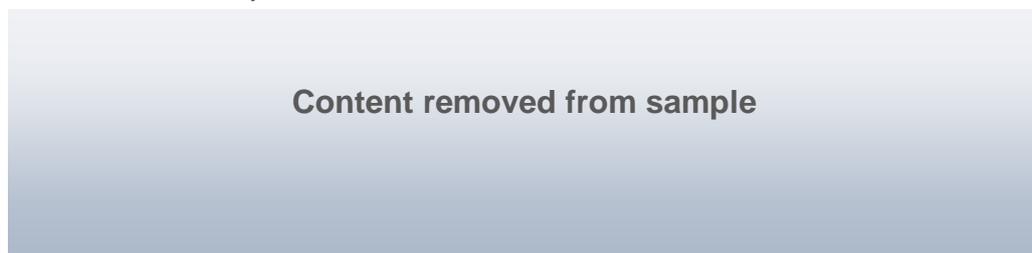
### Increase in demand for seasonal chocolate and chocolate with toys drives total current value sales growth

The outbreak of the pandemic last year had a mixed impact on chocolate confectionery in Italy. On one hand, the lockdown restrictions forced consumers to spend more time at home...



### Ferrero retains category leadership while focusing on sustainability

Despite the company's negative performance in 2020, Ferrero maintained its leadership in chocolate confectionery...



## Health and wellness trend boosts the demand for dark chocolate

As consumers' awareness on healthy nutrition has been accelerated with the presence of COVID-19, the demand for chocolate confectionery with health-related claims and functional properties continues increasing...

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## PROSPECTS AND OPPORTUNITIES

### The premiumisation effect supports the retail category growth in value terms

The impact of COVID-19 is expected to create a long-term shift in chocolate confectionery consumption. As the vaccination programme proceeds, Italian regions are more likely to be allowed to keep their foodservice venues open...

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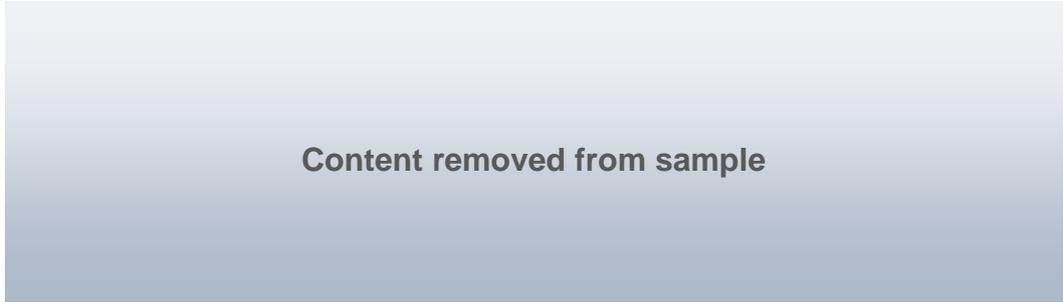
### Demand for chocolate confectionery with healthy benefits will continue soaring

The pandemic outbreak increased consumers' awareness of healthy nutrition and the importance of a balanced diet....

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### Consumer awareness will further focus on sustainable production across the supply chain

Due to health considerations and the increasing awareness of sustainable production, international and local manufacturers will continue focusing on sustainable cocoa sourcing...



### CATEGORY DATA

Table 13 Sales of Chocolate Confectionery by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Chocolate Pouches and Bags	Data removed from sample					
Boxed Assortments						
Chocolate with Toys						
Countlines						
Seasonal Chocolate						
Tablets						
Other Chocolate						
Confectionery						
Chocolate Confectionery						

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

Table 14 Sales of Chocolate Confectionery by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Chocolate Pouches and Bags	Data removed from sample					
Boxed Assortments						
Chocolate with Toys						
Countlines						
Seasonal Chocolate						
Tablets						
Other Chocolate						
Confectionery						
Chocolate Confectionery						

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

**Table 15** Sales of Chocolate Confectionery by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Chocolate Pouches and Bags	<b>Data removed from sample</b>		
Boxed Assortments			
Chocolate with Toys			
Countlines			
Seasonal Chocolate			
Tablets			
Other Chocolate Confectionery			
Chocolate Confectionery			

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

**Table 16** Sales of Chocolate Confectionery by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Chocolate Pouches and Bags	<b>Data removed from sample</b>		
Boxed Assortments			
Chocolate with Toys			
Countlines			
Seasonal Chocolate			
Tablets			
Other Chocolate Confectionery			
Chocolate Confectionery			

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

**Table 17** Sales of Chocolate Tablets by Type: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Filled	<b>Data removed from sample</b>					
Plain Dark						
Plain Milk						
Plain White						
Total						

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

Table 18 NBO Company Shares of Chocolate Confectionery: % Value 2017-2021

% retail value rsp Company	2017	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 19 LBN Brand Shares of Chocolate Confectionery: % 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 20** Distribution of Chocolate Confectionery by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 21** Forecast Sales of Chocolate Confectionery by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Chocolate Pouches and Bags	<b>Data removed from sample</b>					
Boxed Assortments						
Chocolate with Toys						
Countlines						
Seasonal Chocolate						
Tablets						
Other Chocolate Confectionery						
Chocolate Confectionery						

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

**Table 22 Forecast Sales of Chocolate Confectionery by Category: Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Chocolate Pouches and Bags	<b>Data removed from sample</b>					
Boxed Assortments						
Chocolate with Toys						
Countlines						
Seasonal Chocolate						
Tablets						
Other Chocolate Confectionery						
Chocolate Confectionery						

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

**Table 23 Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2021-2026**

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Chocolate Pouches and Bags	<b>Data removed from sample</b>		
Boxed Assortments			
Chocolate with Toys			
Countlines			
Seasonal Chocolate			
Tablets			
Other Chocolate Confectionery			
Chocolate Confectionery			

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

**Table 24 Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2021-2026**

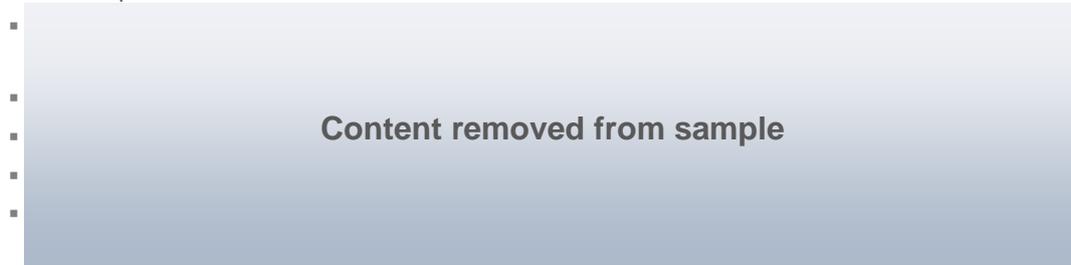
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Chocolate Pouches and Bags	<b>Data removed from sample</b>		
Boxed Assortments			
Chocolate with Toys			
Countlines			
Seasonal Chocolate			
Tablets			
Other Chocolate Confectionery			
Chocolate Confectionery			

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

# GUM IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

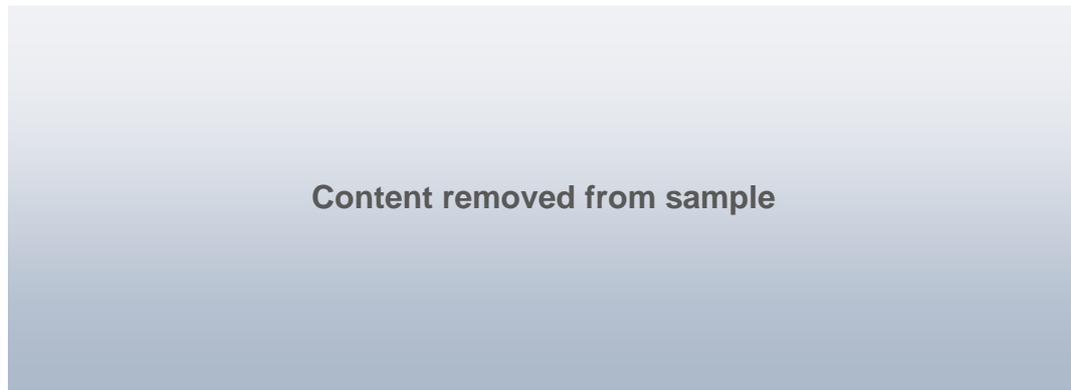
- Increased opportunity for socialising and making impulse purchases drives growth of gum consumption in 2021



## 2021 DEVELOPMENTS

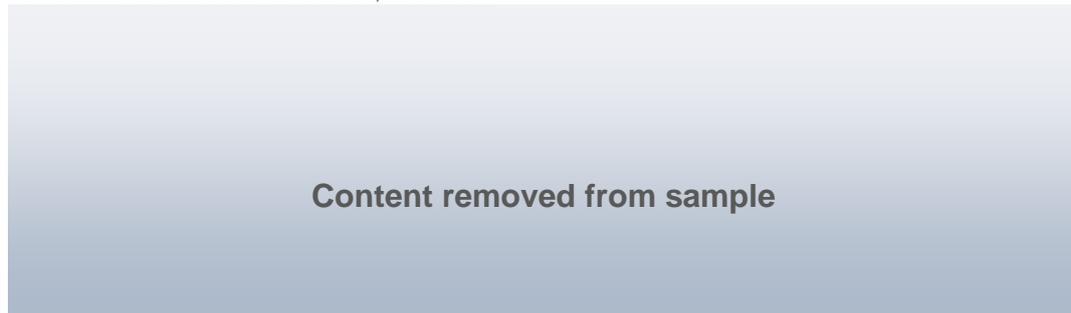
### Easing of lockdown restrictions allow the growth of gum sales

Gum was one of the snacks categories most heavily impacted by the pandemic outbreak in 2020...



### Perfetti Van Melle Italia retains leadership thanks to product diversification

Perfetti Van Melle continued to hold absolute dominance in gum in Italy in 2020 thanks to its numerous well-established brands, such as...



### Mind the Gum continues increasing in the category of fortified gums

Despite the declining performance of the category in 2020, the Italian start-up company Dante Medical Solutions...

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## PROSPECTS AND OPPORTUNITIES

### Oral health concerns drive gum sales to decline

Despite the spike in current value sales in 2021 ...

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### Innovation continues focusing on physical and mental health

As gum consumption loses momentum, manufacturers will continue...

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## Packaging innovation will address the sustainability concerns

Gum is currently available in multiple packaging formats...

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### CATEGORY DATA

**Table 25** Sales of Gum by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Bubble Gum	<b>Data removed from sample</b>					
Chewing Gum						
Gum						

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

**Table 26** Sales of Gum by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Bubble Gum	<b>Data removed from sample</b>					
Chewing Gum						
Gum						

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

**Table 27** Sales of Gum by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Bubble Gum	<b>Data removed from sample</b>		
Chewing Gum			
Gum			

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

**Table 28 Sales of Gum by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Bubble Gum	<b>Data removed from sample</b>		
Chewing Gum			
Gum			

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

**Table 29 Sales of Gum by Flavour: Rankings 2016-2021**

ranking	2016	2017	2018	2019	2020	2021
Spearmint	<b>Data removed from sample</b>					
Peppermint						
Mint						
Strawberry						
Honey & Lemon						
Menthol						
Fruit						
Cola						
Strawberry & Cream						

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

**Table 30 NBO Company Shares of Gum: % Value 2017-2021**

% retail value rsp	2017	2018	2019	2020	2021
Company	<b>Data removed from sample</b>				

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

**Table 31 LBN Brand Shares of Gum: % Value 2018-2021**

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

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

**Table 32** Distribution of Gum by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 33** Forecast Sales of Gum by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Bubble Gum	<b>Data removed from sample</b>					
Chewing Gum						
Gum						

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

**Table 34** Forecast Sales of Gum by Category: Value 2021-2026

EUR million	2021	2022	2023	2024	2025	2026
Bubble Gum	<b>Data removed from sample</b>					
Chewing Gum						

Gum

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

Table 35 Forecast Sales of Gum by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Bubble Gum Chewing Gum Gum	<b>Data removed from sample</b>		

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

Table 36 Forecast Sales of Gum by Category: % Value Growth 2021-2026

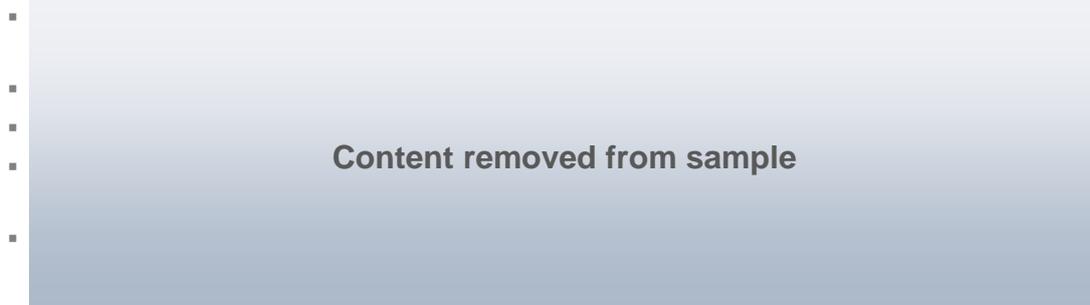
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Bubble Gum Chewing Gum Gum	<b>Data removed from sample</b>		

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

# SUGAR CONFECTIONERY IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

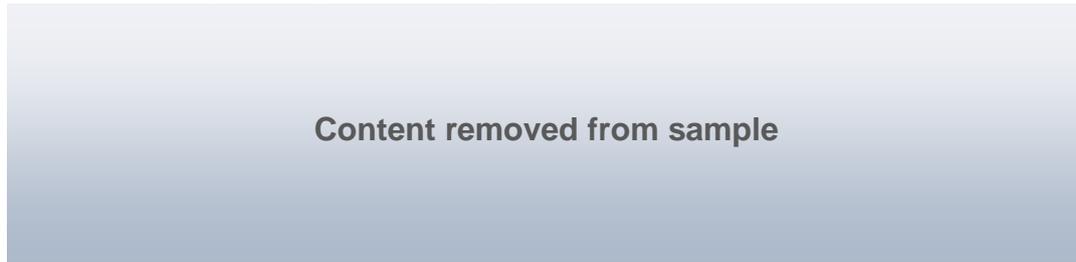
- Taste and functionality alongside the increase in impulse purchases are the main drivers of growth for sugar confectionery in 2021



## 2021 DEVELOPMENTS

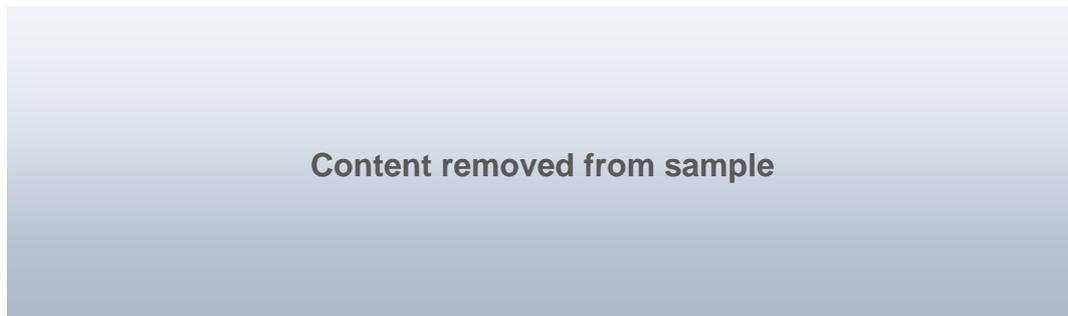
### Increase in impulse purchases drives A partial recovery for the sugar confectionery category

Over the review period, sugar confectionery has been in...



### Perfetti Van Melle Italia retains leadership thanks to new product developments

Perfetti Van Melle remained the category leader in sugar confectionery in 2020 further expanding its current value shares...



### Taste and functionality drive the category growth

Despite the sales increase in 2021, sugar confectionery will continue to be challenged by the increasing awareness of sugar consumption and the negative effect it has on obesity levels and oral health...

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### PROSPECTS AND OPPORTUNITIES

#### Health considerations lead to the decline on sugar confectionery consumption

Despite the increase in 2021, retail sales of sugar confectionery is anticipated to decline throughout the forecast period...

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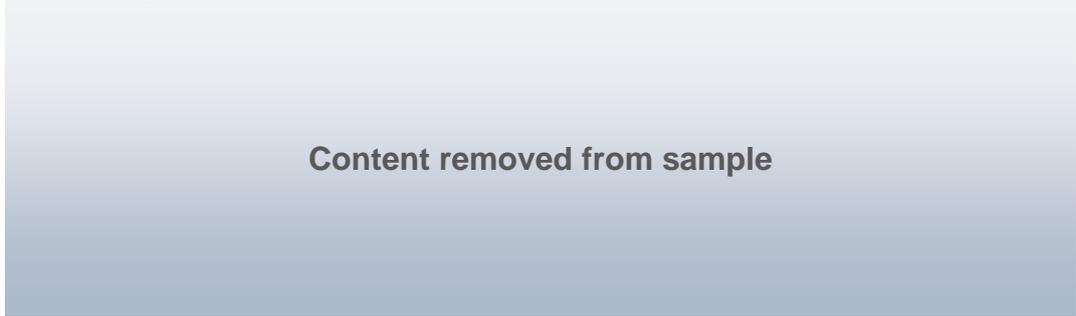
#### Innovation strategies will continue focusing on strong tastes and functional properties

As sugar confectionery will continue being perceived as...

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### Target audience shifts from children to adults

The public awareness around children obesity rates is leading to parents reducing their children's sugar intake...



#### Summary 2 Other Sugar Confectionery by Product Type: 2021

Product type

Marshmallows-

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

### CATEGORY DATA

Table 37 Sales of Sugar Confectionery by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Boiled Sweets	Data removed from sample					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

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

**Table 38** Sales of Sugar Confectionery by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Boiled Sweets	<b>Data removed from sample</b>					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

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

**Table 39** Sales of Sugar Confectionery by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

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

**Table 40** Sales of Sugar Confectionery by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

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

**Table 41 Sales of Pastilles, Gums, Jellies and Chews by Type: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Gums, Jellies and Chews	<b>Data removed from sample</b>					
Pastilles						
Total						

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

**Table 42 NBO Company Shares of Sugar Confectionery: % Value 2017-2021**

% retail value rsp	2017	2018	2019	2020	2021
Company	<b>Data removed from sample</b>				

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

**Table 43 LBN Brand Shares of Sugar Confectionery: % Value 2018-2021**

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

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

**Table 44** Distribution of Sugar Confectionery by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 45** Forecast Sales of Sugar Confectionery by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Boiled Sweets	<b>Data removed from sample</b>					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

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

**Table 46 Forecast Sales of Sugar Confectionery by Category: Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Boiled Sweets	<b>Data removed from sample</b>					
Liquorice						
Lollipops						
Medicated Confectionery						
Mints						
- Power Mints						
- Standard Mints						
Pastilles, Gums, Jellies and Chews						
Toffees, Caramels and Nougat						
Other Sugar Confectionery						
Sugar Confectionery						

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

**Table 47 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2021-2026**

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			
Toffees, Caramels and Nougat			
Other Sugar Confectionery			
Sugar Confectionery			

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

**Table 48 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Boiled Sweets	<b>Data removed from sample</b>		
Liquorice			
Lollipops			
Medicated Confectionery			
Mints			
- Power Mints			
- Standard Mints			
Pastilles, Gums, Jellies and Chews			

Toffees, Caramels and Nougat  
Other Sugar Confectionery  
Sugar Confectionery

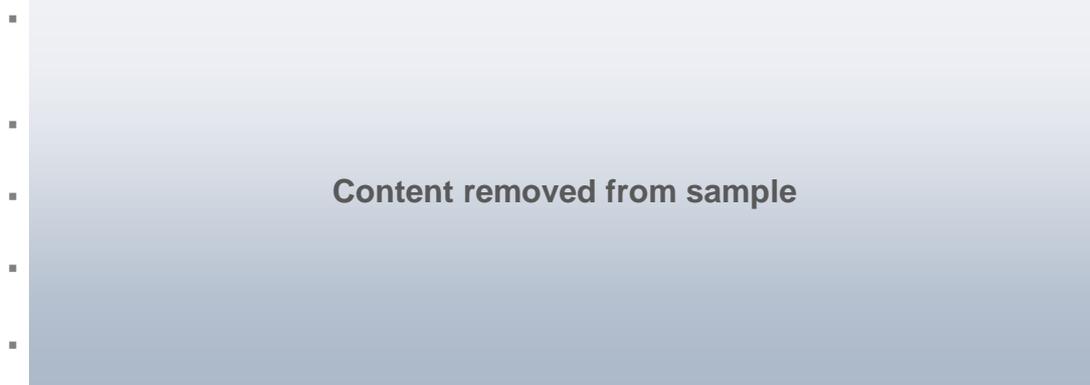
**Data removed from sample**

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

# ICE CREAM AND FROZEN DESSERTS IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

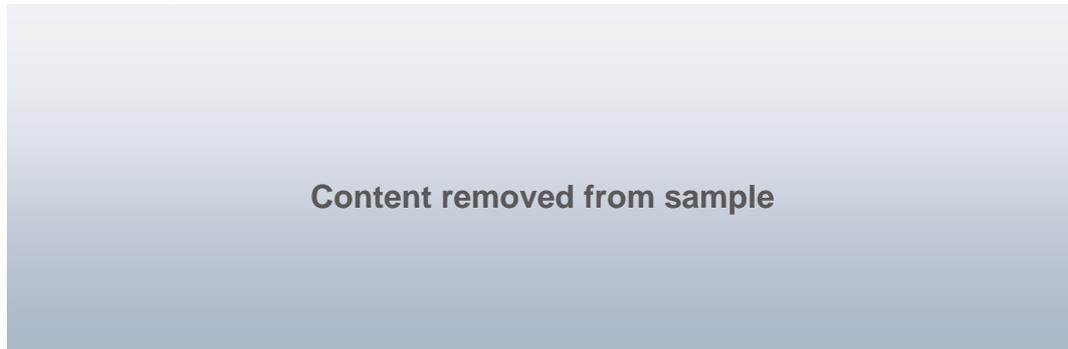
- Increased out of home movement drives the demand for unpackaged and impulse ice cream but leads take-home ice cream category to decline in 2021



## 2021 DEVELOPMENTS

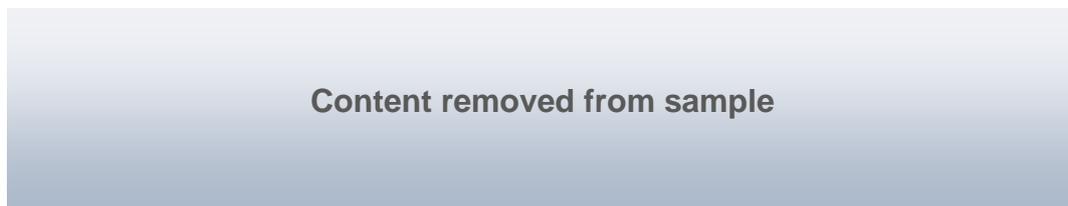
### Unpackaged and impulse ice cream benefits from reduced home seclusion but take-home ice cream sales decline

In 2020, the ice cream category experienced an overall negative impact from the pandemic and the subsequent lockdown restrictions...



### Unilever retains leadership while its ice cream ally Ferrero expands its range

In 2020, Unilever Italia Mkt Operations retained its leadership thanks to...



### Innovation focuses on healthy ice cream and frozen yoghurt

The pandemic outbreak has accelerated the increasing awareness of healthy nutrition and sustainable consumption. This has positively affected the demand for ice cream bearing health claims...

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## PROSPECTS AND OPPORTUNITIES

### Ease of travel restrictions and out-of-home movement boosts the sales of unpackaged ice cream

The health and sustainability trend will drive the demand for free from dairy ice cream which is projected to record...

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### Manufacturers focus on high quality ingredients to compete with artisanal ice cream

Considering COVID-19 and the increasing health and wellness trend, plenty of awareness has been raised around the health benefits of home-made ice cream...

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### Manufacturers focus on extended seasonality to enlarge the consumption of ice cream.

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**CATEGORY DATA**

**Table 49 Sales of Ice Cream and Frozen Desserts by Category: Volume 2016-2021**

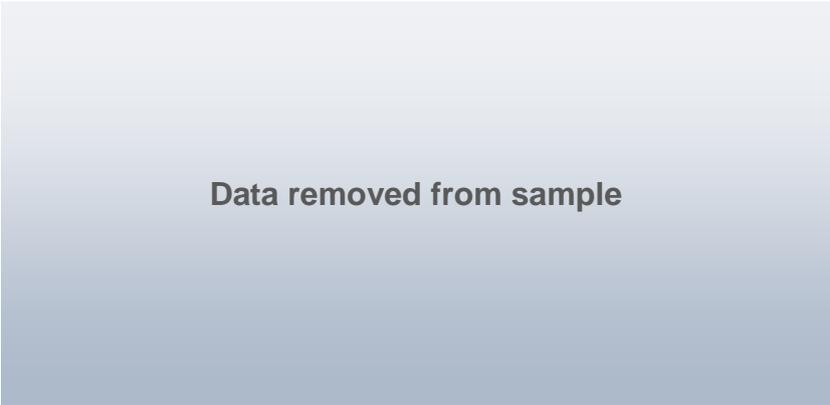
	2016	2017	2018	2019	2020	2021
Frozen Desserts ('000 tonnes)	<b>Data removed from sample</b>					
Ice Cream (million litres)						
- Frozen Yoghurt (million litres)						
- Impulse Ice Cream (million litres)						
-- Single Portion Dairy Ice Cream (million litres)						
-- Single Portion Water Ice Cream (million litres)						
- Unpackaged Ice Cream (million litres)						
- Take-Home Ice Cream (million litres)						
-- Take-Home Dairy Ice Cream (million litres)						
--- Bulk Dairy Ice Cream (million litres)						
--- Ice Cream Desserts (million litres)						
--- Multi-Pack Dairy Ice Cream (million litres)						
-- Take-Home Water Ice Cream (million litres)						
--- Bulk Water Ice Cream (million litres)						
--- Multi-Pack Water Ice Cream (million litres)						
Ice Cream and Frozen Desserts (Not calculable)						

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

**Table 50 Sales of Ice Cream and Frozen Desserts by Category: Value 2016-2021**

EUR million	2016	2017	2018	2019	2020	2021
Frozen Desserts	<b>Data removed from sample</b>					
Ice Cream						
- Frozen Yoghurt						
- Impulse Ice Cream						
-- Single Portion Dairy Ice Cream						
-- Single Portion Water Ice Cream						

- Unpackaged Ice Cream
- Take-Home Ice Cream
- Take-Home Dairy Ice Cream
- Bulk Dairy Ice Cream
- Ice Cream Desserts
- Multi-Pack Dairy Ice Cream
- Take-Home Water Ice Cream
- Bulk Water Ice Cream
- Multi-Pack Water Ice Cream
- Ice Cream and Frozen Desserts



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

**Table 51 Sales of Ice Cream and Frozen Desserts by Category: % Volume Growth 2016-2021**

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Frozen Desserts	Data removed from sample		
Ice Cream			
- Frozen Yoghurt			
- Impulse Ice Cream			
-- Single Portion Dairy Ice Cream			
-- Single Portion Water Ice Cream			
- Unpackaged Ice Cream			
- Take-Home Ice Cream			
-- Take-Home Dairy Ice Cream			
--- Bulk Dairy Ice Cream			
--- Ice Cream Desserts			
--- Multi-Pack Dairy Ice Cream			
-- Take-Home Water Ice Cream			
--- Bulk Water Ice Cream			
--- Multi-Pack Water Ice Cream			
Ice Cream and Frozen Desserts			

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

**Table 52 Sales of Ice Cream and Frozen Desserts by Category: % Value Growth 2016-2021**

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Frozen Desserts	Data removed from sample		
Ice Cream			
- Frozen Yoghurt			
- Impulse Ice Cream			
-- Single Portion Dairy Ice Cream			
-- Single Portion Water Ice Cream			
- Unpackaged Ice Cream			
- Take-Home Ice Cream			

- Take-Home Dairy Ice Cream
- Bulk Dairy Ice Cream
- Ice Cream Desserts
- Multi-Pack Dairy Ice Cream
- Take-Home Water Ice Cream
- Bulk Water Ice Cream
- Multi-Pack Water Ice Cream
- Ice Cream and Frozen Desserts

**Data removed from sample**

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

**Table 53 Sales of Ice Cream by Leading Flavours: Rankings 2016-2021**

ranking	2016	2017	2018	2019	2020	2021
Chocolate	<b>Data removed from sample</b>					
Nut						
Vanilla						
Lemon						
Strawberry						
Coconut						
Coffee						
Forest Fruits						
Stracciatella						
Banana						

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

**Table 54 Sales of Impulse Ice Cream by Format: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Cones	<b>Data removed from sample</b>					
Sticks						
Others						
Total						

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

**Table 55 NBO Company Shares of Ice Cream and Frozen Desserts: % Value 2017-2021**

% retail value rsp					
Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

**Table 56** LBN Brand Shares of Ice Cream and Frozen Desserts: % Value 2018-2021

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

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

**Table 57** NBO Company Shares of Ice Cream: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

Table 58 LBN Brand Shares of Ice Cream: % 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 59 NBO Company Shares of Impulse Ice Cream: % Value 2017-2021

% retail value rsp Company	2017	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 60 LBN Brand Shares of Impulse Ice Cream: % 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 61 NBO Company Shares of Take-home Ice Cream: % Value 2017-2021**

% retail value rsp Company	2017	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 62 LBN Brand Shares of Take-home Ice Cream: % 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 63** NBO Company Shares of Frozen Desserts: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

**Table 64** LBN Brand Shares of Frozen Desserts: % Value 2018-2021

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

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

**Table 65** Distribution of Ice Cream and Frozen Desserts by Format: % Value 2016-2021

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



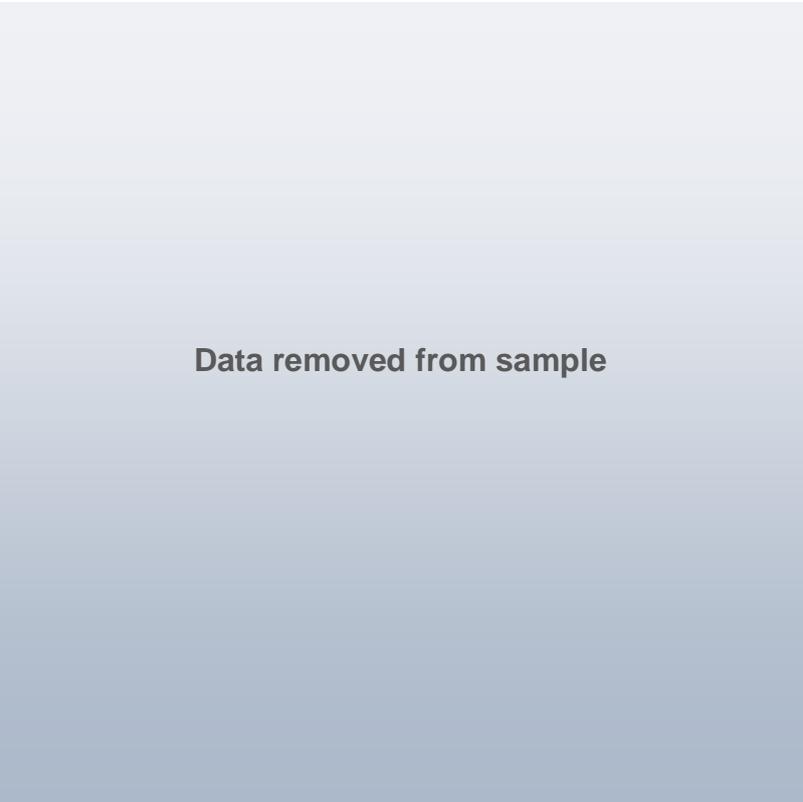
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 66**      **Distribution of Ice Cream by Format: % Value 2016-2021**

% retail value rsp

2016      2017      2018      2019      2020      2021

- Store-Based Retailing
- 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 67** Distribution of Frozen Desserts by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 68** Forecast Sales of Ice Cream and Frozen Desserts by Category: Volume 2021-2026

	2021	2022	2023	2024	2025	2026
Frozen Desserts ('000 tonnes)	<b>Data removed from sample</b>					
Ice Cream (million litres)						
- Frozen Yoghurt (million litres)						
- Impulse Ice Cream (million litres)						
-- Single Portion Dairy Ice Cream (million litres)						
-- Single Portion Water Ice Cream (million litres)						
- Unpackaged Ice Cream (million litres)						
- Take-Home Ice Cream						

- (million litres)
- Take-Home Dairy Ice Cream (million litres)
- Bulk Dairy Ice Cream (million litres)
- Ice Cream Desserts (million litres)
- Multi-Pack Dairy Ice Cream (million litres)
- Take-Home Water Ice Cream (million litres)
- Bulk Water Ice Cream (million litres)
- Multi-Pack Water Ice Cream (million litres)
- Ice Cream and Frozen Desserts (Not calculable)



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

Table 69 Forecast Sales of Ice Cream and Frozen Desserts by Category: Value 2021-2026

EUR million

	2021	2022	2023	2024	2025	2026
Frozen Desserts	Data removed from sample					
Ice Cream						
- Frozen Yoghurt						
- Impulse Ice Cream						
-- Single Portion Dairy Ice Cream						
-- Single Portion Water Ice Cream						
- Unpackaged Ice Cream						
- Take-Home Ice Cream						
-- Take-Home Dairy Ice Cream						
--- Bulk Dairy Ice Cream						
--- Ice Cream Desserts						
--- Multi-Pack Dairy Ice Cream						
-- Take-Home Water Ice Cream						
--- Bulk Water Ice Cream						
--- Multi-Pack Water Ice Cream						
Ice Cream and Frozen Desserts						

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

**Table 70 Forecast Sales of Ice Cream and Frozen Desserts by Category: % Volume Growth 2021-2026**

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Frozen Desserts	<b>Data removed from sample</b>		
Ice Cream			
- Frozen Yoghurt			
- Impulse Ice Cream			
-- Single Portion Dairy Ice Cream			
-- Single Portion Water Ice Cream			
- Unpackaged Ice Cream			
- Take-Home Ice Cream			
-- Take-Home Dairy Ice Cream			
--- Bulk Dairy Ice Cream			
--- Ice Cream Desserts			
--- Multi-Pack Dairy Ice Cream			
-- Take-Home Water Ice Cream			
--- Bulk Water Ice Cream			
--- Multi-Pack Water Ice Cream			
Ice Cream and Frozen Desserts			

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

**Table 71 Forecast Sales of Ice Cream and Frozen Desserts by Category: % Value Growth 2021-2026**

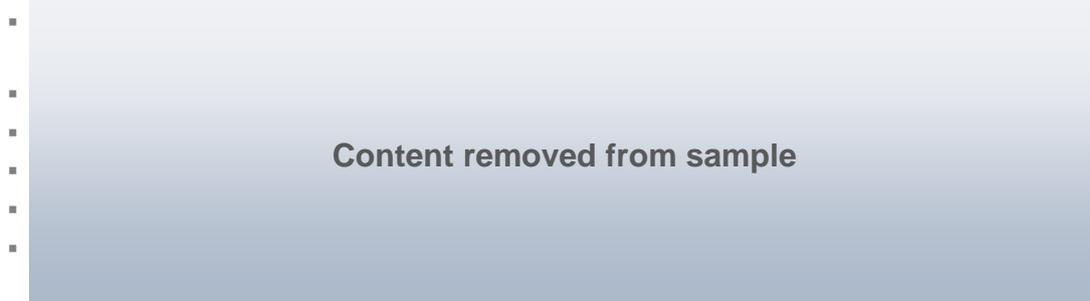
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Frozen Desserts	<b>Data removed from sample</b>		
Ice Cream			
- Frozen Yoghurt			
- Impulse Ice Cream			
-- Single Portion Dairy Ice Cream			
-- Single Portion Water Ice Cream			
- Unpackaged Ice Cream			
- Take-Home Ice Cream			
-- Take-Home Dairy Ice Cream			
--- Bulk Dairy Ice Cream			
--- Ice Cream Desserts			
--- Multi-Pack Dairy Ice Cream			
-- Take-Home Water Ice Cream			
--- Bulk Water Ice Cream			
--- Multi-Pack Water Ice Cream			
Ice Cream and Frozen Desserts			

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

# SAVOURY SNACKS IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

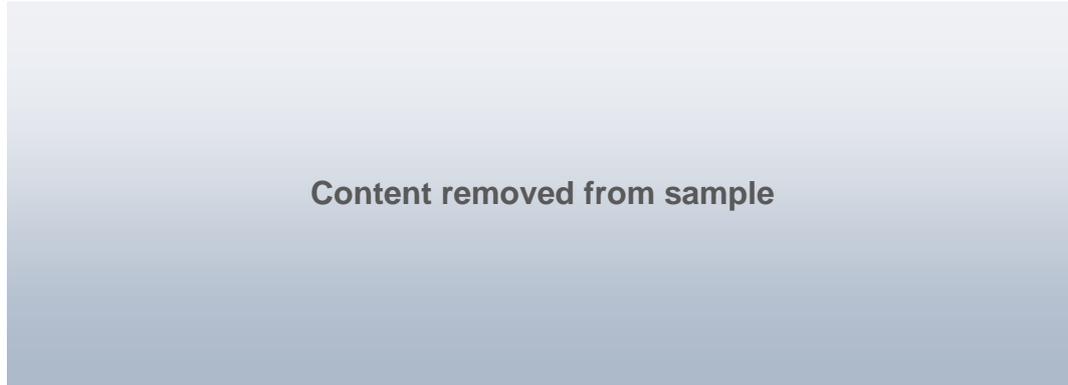
- Demand for savoury snacks declines in 2021 as consumers spend less time at home



## 2021 DEVELOPMENTS

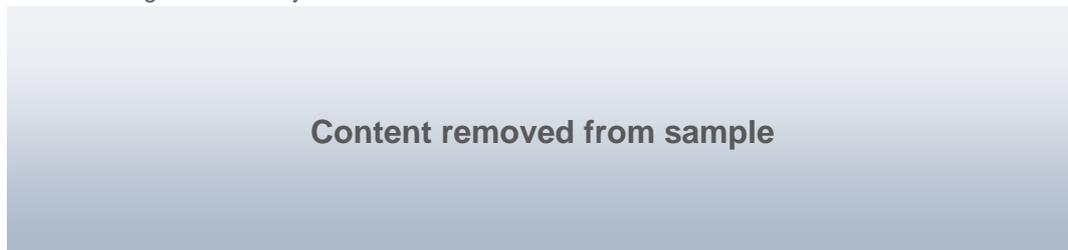
### Savoury snacks consumption declines due to reduced home seclusion

In 2020, the Italian savoury snacks category experienced an impressive increase due to home seclusion and the closure of the foodservice sector and entertainment venues in the lockdown months...



### Innovation focuses on health and wellness

The trend towards health and wellness has impacted the innovation activities of savoury snacks during the last few years...



## Legume-based snacks gain ground and attract new product launches

Vegetable, pulse and bread chips is the category that will see the highest growth...

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## PROSPECTS AND OPPORTUNITIES

### Healthy snacks perform the fastest growth

The demand for healthy snacks observed in 2020 and 2021 is expected to remain throughout the forecast period...

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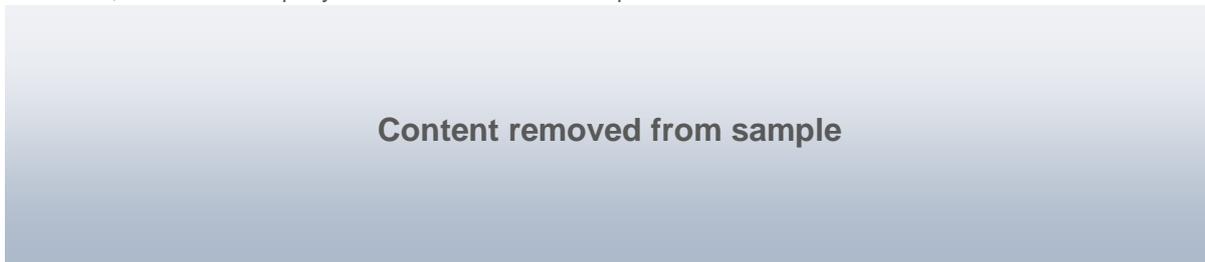
### Packaging formats shift to larger size

From 2022 onwards, it is expected that most movement restrictions will be eased allowing to Italians increased out-of-home movement...

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### Consumers continue showing preference towards Italian products

In 2021, the Italian company Barilla Alimentare is anticipated to retain its...



### CATEGORY DATA

**Table 72** Sales of Savoury Snacks by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Nuts, Seeds and Trail Mixes	<b>Data removed from sample</b>					
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 73** Sales of Savoury Snacks by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Nuts, Seeds and Trail Mixes	<b>Data removed from sample</b>					
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 74 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	<b>Data removed from sample</b>		
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 75 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	<b>Data removed from sample</b>		
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 76 NBO Company Shares of Savoury Snacks: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	<b>Data removed from sample</b>				



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

Table 77 LBN Brand Shares of Savoury Snacks: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 78** Distribution of Savoury Snacks by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 79** Forecast Sales of Savoury Snacks by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Nuts, Seeds and Trail Mixes	<b>Data removed from sample</b>					
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 80 Forecast Sales of Savoury Snacks by Category: Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Nuts, Seeds and Trail Mixes	<b>Data removed from sample</b>					
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 81 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2021-2026**

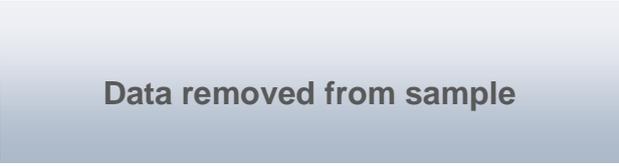
% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Nuts, Seeds and Trail Mixes	<b>Data removed from sample</b>		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			
- Vegetable, Pulse and Bread Chips			
Savoury Biscuits			
Popcorn			
Pretzels			
Other Savoury Snacks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

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

**Table 82 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	<b>Data removed from sample</b>		
Salty Snacks			
- Potato Chips			
- Tortilla Chips			
- Puffed Snacks			
- Rice Snacks			

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

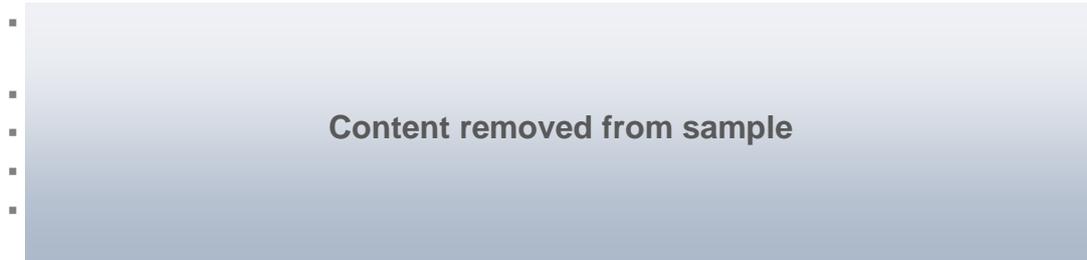


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# SWEET BISCUITS, SNACK BARS AND FRUIT SNACKS IN ITALY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

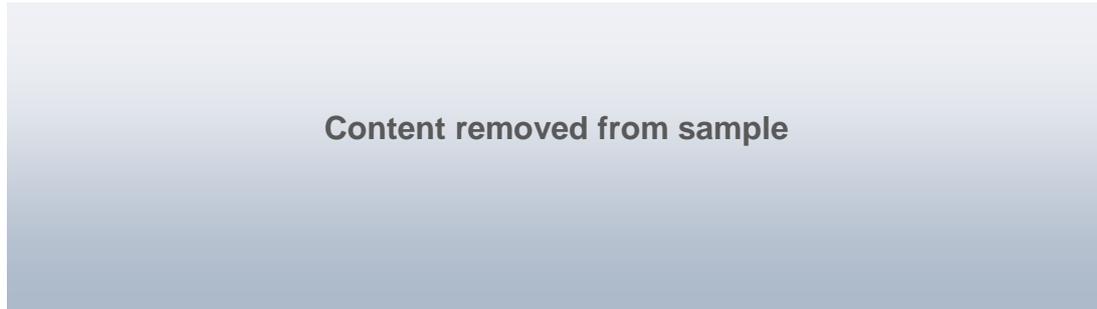
- Increased impulse purchasing occasions drive the growth for snack bars in 2021 while the reduced home seclusion and indulgence trend lead sweet biscuits to stagnate



## 2021 DEVELOPMENTS

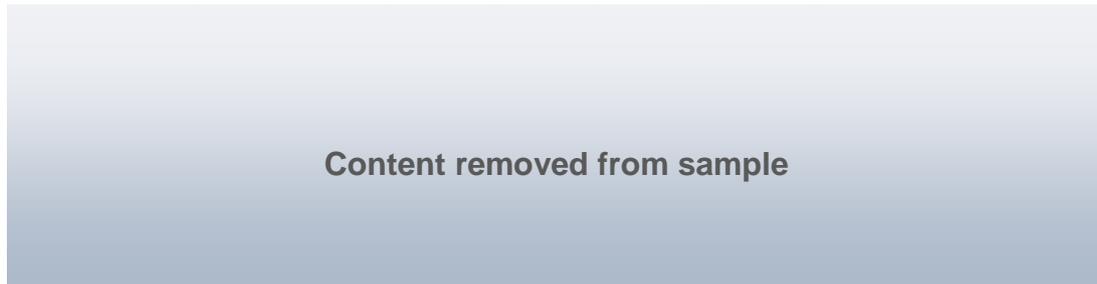
### Reduced home seclusion leads snack bars and fruit snacks to grow while sweet biscuits stagnate

The onset of the COVID-19 pandemic had a mixed impact on sweet biscuits, snack bars and fruit snacks in 2020...



### Familiarity drives the preference towards Italian established brands

The category of sweet biscuits and fruit snacks is dominated by Italian companies with local and international presence. In 2020, branded products performed particularly...



## Ferrero is expanding its Nutella Biscuits production to capitalise on its successful launch

In just one year since its launch, Nutella Biscuits managed to dominate the category of filled biscuits...

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## PROSPECTS AND OPPORTUNITIES

### Trends towards health and indulgence drives category growth

The pandemic shed light on consumers' desire to pamper themselves with indulgent treats while spending most of their time at home...

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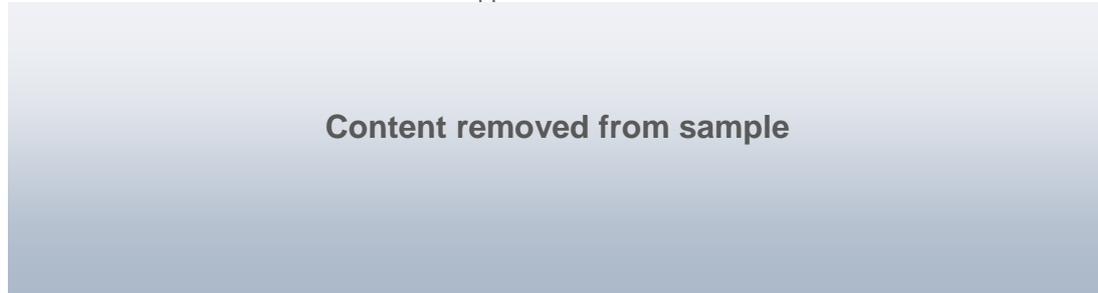
### E-commerce continues expanding and creates new opportunities for customer engagement

In 2020 the online channel experienced a spike in sales of sweet biscuits, snack bars and fruit snacks as many Italians shifted from store visits to e-commerce...

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### Out of home movement increases the demand for single-portion packaging

The increased home seclusion observed in 2020 has already been somewhat moderated in 2021 as Italian consumers have had more opportunities to leave home...



### CATEGORY DATA

**Table 83** Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2016-2021

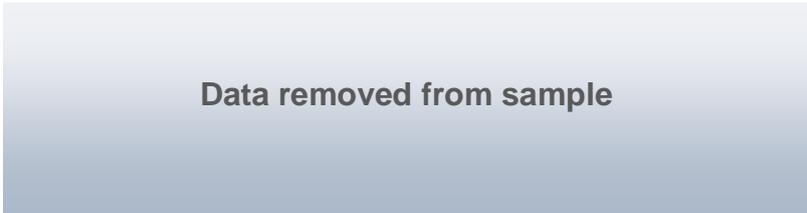
'000 tonnes	2016	2017	2018	2019	2020	2021
Fruit Snacks	<b>Data removed from sample</b>					
- Dried Fruit						
- Processed Fruit Snacks						
Snack Bars						
- Cereal Bars						
- Protein/Energy Bars						
- Fruit and Nut Bars						
Sweet Biscuits						
- Chocolate Coated Biscuits						
- Cookies						
- Filled Biscuits						
- Plain Biscuits						
- Wafers						
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 84** Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2016-2021

EUR million	2016	2017	2018	2019	2020	2021
Fruit Snacks	<b>Data removed from sample</b>					
- Dried Fruit						
- Processed Fruit Snacks						
Snack Bars						
- Cereal Bars						
- Protein/Energy Bars						
- Fruit and Nut Bars						
Sweet Biscuits						

- Chocolate Coated Biscuits
- Cookies
- Filled Biscuits
- Plain Biscuits
- Wafers
- Sweet Biscuits, Snack Bars and Fruit Snacks



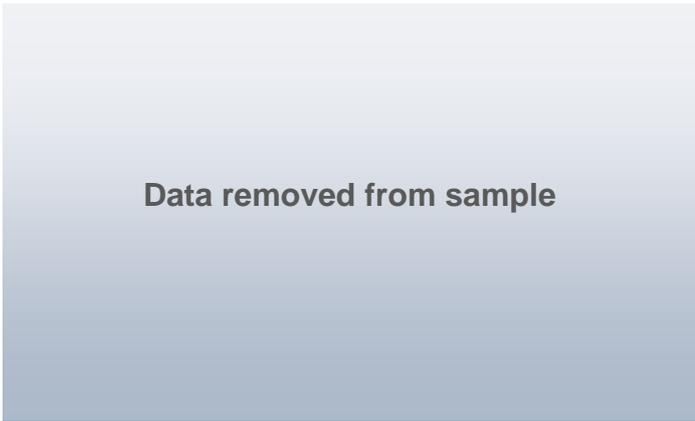
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 85 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2016-2021**

% volume growth

2020/21      2016-21 CAGR      2016/21 Total

- Fruit Snacks
- Dried Fruit
- Processed Fruit Snacks
- Snack Bars
- Cereal Bars
- Protein/Energy Bars
- Fruit and Nut Bars
- Sweet Biscuits
- Chocolate Coated Biscuits
- Cookies
- Filled Biscuits
- Plain Biscuits
- Wafers
- Sweet Biscuits, Snack Bars and Fruit Snacks



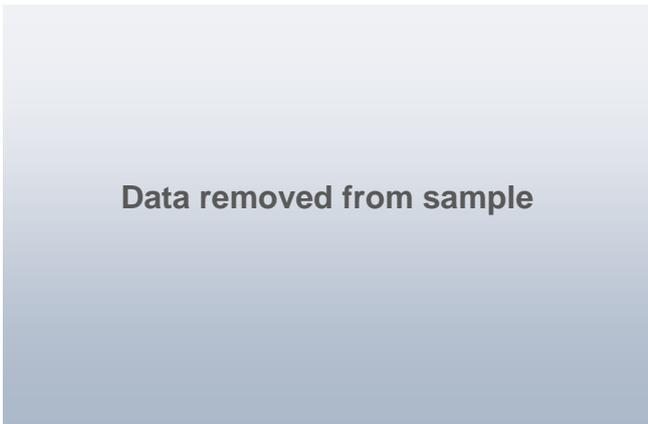
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 86 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2016-2021**

% current value growth

2020/21      2016-21 CAGR      2016/21 Total

- Fruit Snacks
- Dried Fruit
- Processed Fruit Snacks
- Snack Bars
- Cereal Bars
- Protein/Energy Bars
- Fruit and Nut Bars
- Sweet Biscuits
- Chocolate Coated Biscuits
- Cookies
- Filled Biscuits
- Plain Biscuits
- Wafers
- 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 87 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2017-2021**

% retail value rsp Company	2017	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 88 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit 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 89 NBO Company Shares of Sweet Biscuits: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

**Data removed from sample**

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

Table 90 LBN Brand Shares of Sweet Biscuits: % 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 91 NBO Company Shares of Snack Bars: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

**Data removed from sample**

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

**Table 92 LBN Brand Shares of Snack Bars: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**

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

**Table 93** NBO Company Shares of Fruit Snacks: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
<b>Data removed from sample</b>					

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

**Table 94** LBN Brand Shares of Fruit Snacks: % Value 2018-2021

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

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

**Table 95** Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2016-2021

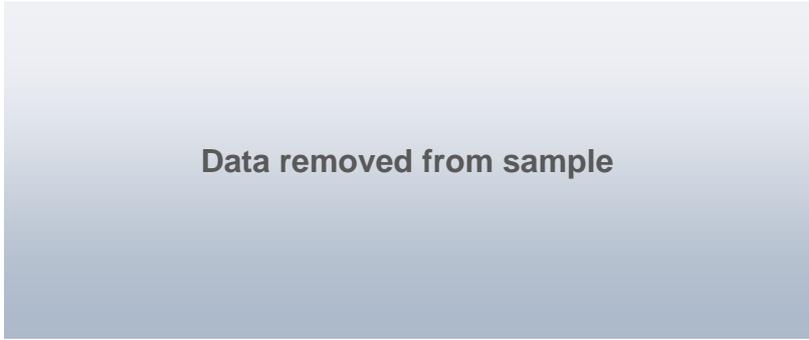
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional 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 96** Distribution of Sweet Biscuits by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 97**      **Distribution of Snack Bars 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 98** Distribution of Fruit Snacks by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- 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 99** Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Fruit Snacks	<b>Data removed from sample</b>					
- Dried Fruit						
- Processed Fruit Snacks						
Snack Bars						
- Cereal Bars						
- Protein/Energy Bars						
- Fruit and Nut Bars						
Sweet Biscuits						
- Chocolate Coated Biscuits						
- Cookies						
- Filled Biscuits						
- Plain Biscuits						
- Wafers						
Sweet Biscuits, Snack Bars and Fruit Snacks						

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

**Table 100 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2021-2026**

EUR million	2021	2022	2023	2024	2025	2026
Fruit Snacks	<b>Data removed from sample</b>					
- Dried Fruit						
- Processed Fruit Snacks						
Snack Bars						
- Cereal Bars						
- Protein/Energy Bars						
- Fruit and Nut Bars						
Sweet Biscuits						
- Chocolate Coated Biscuits						
- Cookies						
- Filled Biscuits						
- Plain Biscuits						
- Wafers						
Sweet Biscuits, Snack Bars and Fruit Snacks						

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

**Table 101 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2021-2026**

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Fruit Snacks	<b>Data removed from sample</b>		
- Dried Fruit			
- Processed Fruit Snacks			
Snack Bars			
- Cereal Bars			
- Protein/Energy Bars			
- Fruit and Nut Bars			
Sweet Biscuits			
- Chocolate Coated Biscuits			
- Cookies			
- Filled Biscuits			
- Plain Biscuits			
- Wafers			
Sweet Biscuits, Snack Bars and Fruit Snacks			

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

**Table 102 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2021-2026**

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Fruit Snacks			
- Dried Fruit			
- Processed Fruit Snacks			
Snack Bars			
- Cereal Bars			
- Protein/Energy Bars			
- Fruit and Nut Bars			
Sweet Biscuits			
- Chocolate Coated Biscuits			
- Cookies			
- Filled Biscuits			
- Plain Biscuits			
- Wafers			
Sweet Biscuits, Snack Bars and Fruit Snacks			



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