



Passport

Sweet Biscuits, Snack Bars and Fruit Snacks in Australia

Euromonitor International

June 2021

This sample report is for illustration
purposes only.

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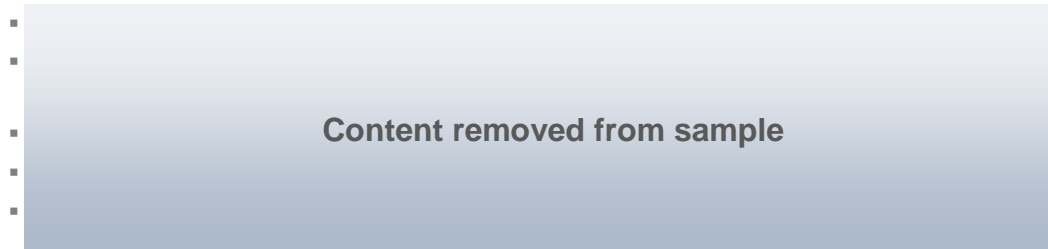
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SWEET BISCUITS, SNACK BARS AND FRUIT SNACKS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

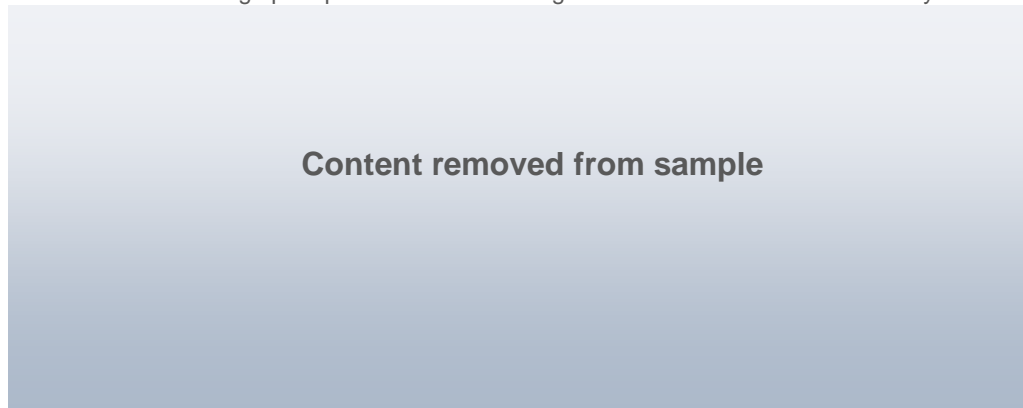
- Growth slows in 2021 as the COVID-19 home snacking trend slows with the easing of lockdown restrictions in Australia



2021 DEVELOPMENTS

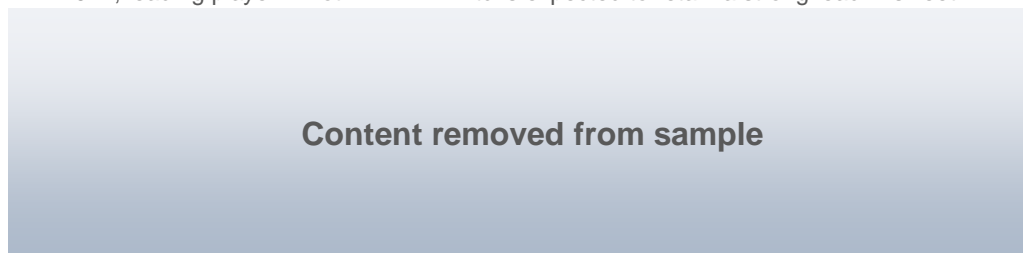
The COVID-19 boost comes to an end in 2021 as on-trade sales recover

Consumers stocking up on products and snacking more to stave off boredom as they work...



Arnott's launches new Tim Tam range as Mondelez expands its Belvita line

In 2021, leading player Arnott's Biscuits Ltd is expected to retain a strong lead in sweet...



Category becomes increasingly fragmented as dried fruit loses its appeal

Increasing fragmentation is seen across sweet biscuits, snack bars and fruit snacks in 2021.

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PROSPECTS AND OPPORTUNITIES

Plant-based products are on the rise as the vegan trend sets in

Over the forecast period, the vegan trend is expected to emerge more strongly in sweet biscuits, snack bars and fruit snacks as increasing numbers of consumers turn to vegan...

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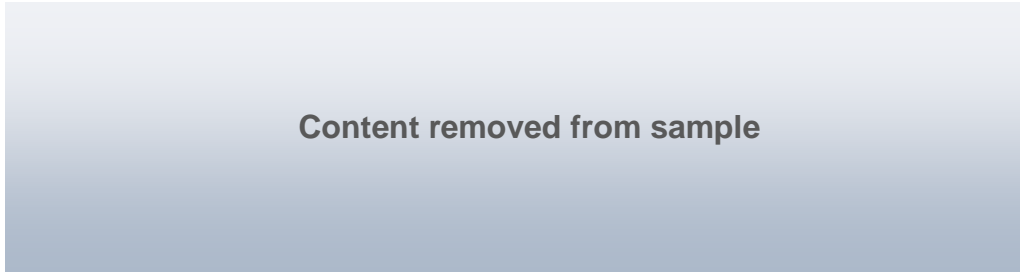
Consumers opt for functional products as they demand more from their snacks

Over the forecast period consumers are expected to demand more from their snacks, with...

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Consumers increasingly opt for more indulgent products

Although healthy products are gaining considerable momentum in the category, indulgence...



CATEGORY DATA

Table 1 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Fruit Snacks	Data removed from sample					
- 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 2 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2016-2021

AUD million	2016	2017	2018	2019	2020	2021
Fruit Snacks	Data removed from sample					
- 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

Data removed from sample

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

Table 3 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

Data removed from sample

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

Table 4 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

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 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 6 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
-----------------------------------	---------------	------	------	------	------

Data removed from sample

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

Table 7 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 8 LBN Brand Shares of Sweet Biscuits: % 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 9 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 10 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 11 NBO Company Shares of Fruit Snacks: % 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 12 LBN Brand Shares of 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 13 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2016-2021

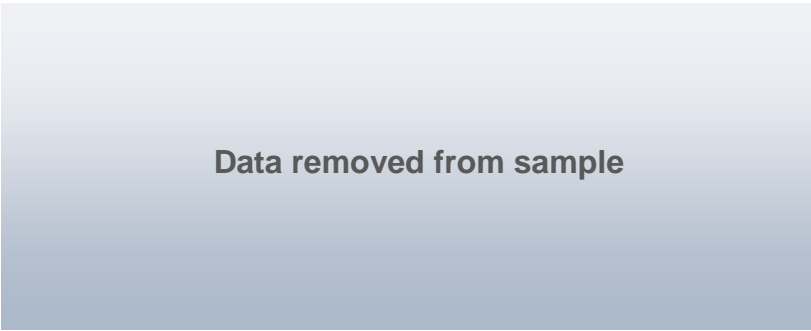
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional 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 14 Distribution of Sweet Biscuits 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 15 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 16 Distribution of Fruit 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 17 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	Data removed from sample					
- 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 18 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2021-2026

AUD million	2021	2022	2023	2024	2025	2026
Fruit Snacks	Data removed from sample					
- 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 19 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	Data removed from sample		
- 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 20 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			

Data removed from sample

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

SNACKS IN AUSTRALIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Snacks in 2021: The big picture

Comfort food trends are expected to remain a key driver of sales in snacks in 2021. Many consumers turned to products in snacks as a source of comfort and indulgence whilst other...

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Key trends in 2021

Health and wellness trends are increasingly influencing product development and consumer purchasing habits in Australian snacks, and this trend will continue in...

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Competitive landscape

Mondelez continues to lead snacks in Australia, with its Cadbury lines in chocolate...

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Channel developments

Due to the health and hygiene issues associated with the COVID-19 pandemic, e-commerce has gained considerable traction in Australia in 2020 and will continue to grow in 2021...

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What next for snacks?

Some of the changes in consumption behaviour in Australia are expected to remain in play over the forecast period as consumers adopt lasting habits during the long COVID-19 pandemic.

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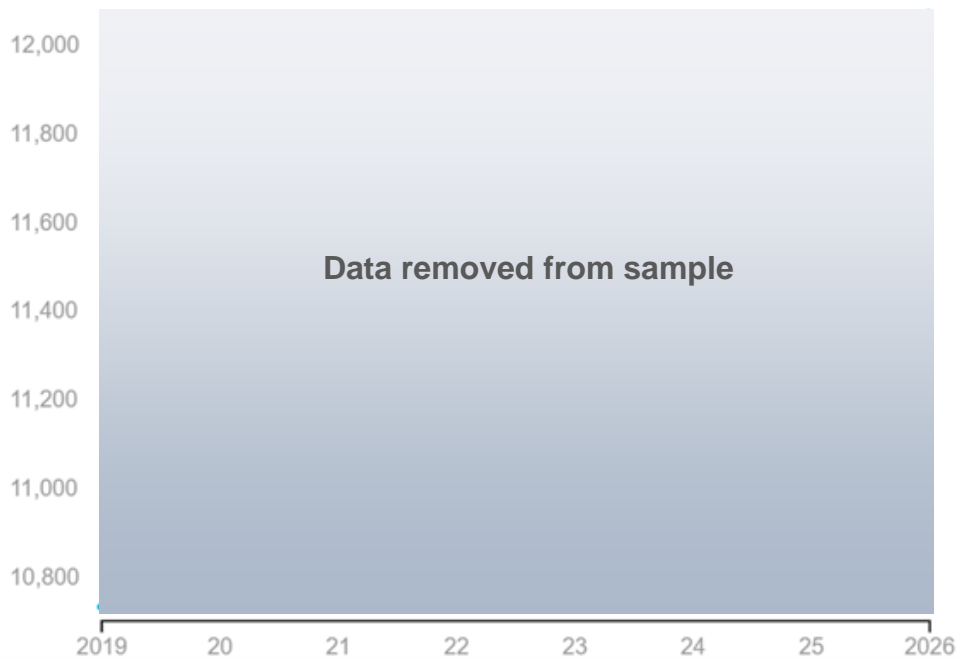
Chart 1 Snacks Value Sales Growth Scenarios: 2019-2026

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

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Snacks - Australia

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

Australia - Snacks

Retail Value Sales, Real Growth

Passport Baseline

Driver effects

GDP Per Capita

Product Price

Habit Persistence

Population

Socio-Economic Trends

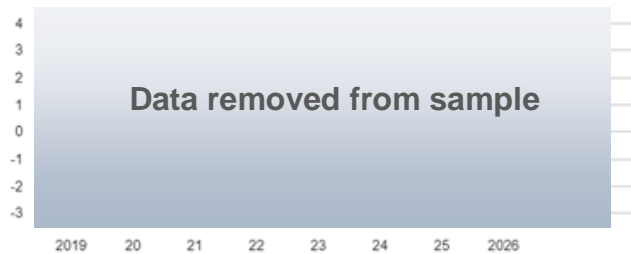
(Share of Population with Higher Education; Share of Vegetarian Population)

Market Environment

(Cheese Retail Volume Sales per Capita; Obese Population)

Soft Drivers

(- Channel Shifts; - Competition; - Consumer awareness; - Maturity of sector; + 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 21 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 22 Sales of Snacks by Category: Value 2016-2021

AUD 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

Data removed from sample

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

Table 23 Sales of Snacks by Category: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

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

Data removed from sample

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

Table 24 Sales of Snacks by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

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

Data removed from sample

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

Table 25 NBO Company Shares of Snacks: % 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 26 LBN Brand Shares of Snacks: % 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 27 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 28 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 29 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 30 Forecast Sales of Snacks by Category: Value 2021-2026

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

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

Table 31 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	Data removed from sample		

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

Table 32 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	Data removed from sample		

DISCLAIMER

Forecast and scenario closing date: 14 June 2021

Report closing date: 16 June 2021

Analysis and data in this report give full consideration to consumer behaviour and market 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 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

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

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Trade Associations

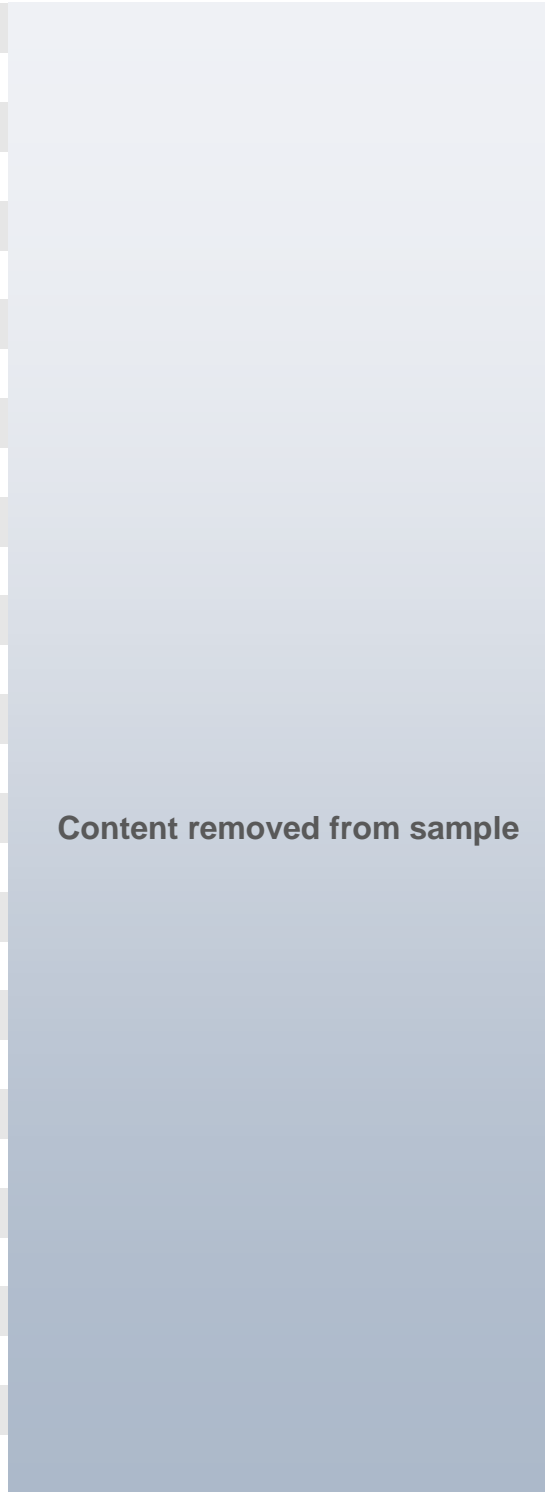
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[Redacted]

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Trade Press	



Content removed from sample

Source: Euromonitor International