

SNACK FOOD IN THE U.S.

2014 EDITION (Published July 2014. Data through 2013. Market projections through 2018.) More than 250 pages, with extensive text analysis, graphs, charts and more than 80 tables.



Through its BMC Information Services Groups, Beverage Marketing explores trends in an area that often shares usage occasions as well as certain challenges with beverages. This report examines market trends and recent industry developments, including the various mergers, acquisitions and spin-offs involving Kellogg, Procter & Gamble, Mondelez and Hostess Brands. It profiles leading companies, including those also involved with beverages, such as PepsiCo, as well as food giants like ConAgra and General Mills and snack food-centric entities like Herr Foods. The report also contains Beverage Marketing's exclusive five-year projections.

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QUESTIONS?

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THE ANSWERS YOU NEED

- On a wholesale, total market (all-sales-channel-inclusive) basis, how did the various segments of the exceptionally diverse U.S. snack food market perform in 2013?
- How have companies responded to concerns about health, nutrition, the environment and other issues affecting the industry?
- How did the leading snack food companies rank, and what were their sales in 2013?
- How does growth in the various candy sectors compare with snack segments?
- What does the future hold for snack food, and what trends are driving developments?
- Which snack and candy sectors will experience growth through 2018? Which will stabilize or decline?

THIS REPORT FEATURES

Snack Food in the U.S. covers all segments of the diverse packaged snack food industry, from salty to sweet and everything in between, examining market trends and recent industry developments. For greater perspective, the report provides a comparison between wholesale level trends vs. select sales channel results. It also includes a brief section on candy trends. Coverage includes:

- An overview of the total U.S. snack food market as well as a segment-by-segment breakdown
- Sales, market share and growth for snack food sub-segments including potato chips, crackers, tortilla chips, cookies, snack bars/granola bars, snack nuts/seeds/corn nuts, pretzels, fruit snacks, cheese snacks, dried meat snacks, rice/popcorn cakes, RTE Popcorn/caramel corn and pork rinds
- Examination of the regional markets, measured in wholesale dollars sales
- A look at candy market trends including wholesale sales, growth and share as well as results by sales channel for chocolate candy, chewy and soft candy, gum, hard candy, panned non-chocolate candy and licorice
- Includes profiles of Campbell Soup Company, ConAgra, Diamond Foods, General Mills, Herr Foods, Snyder's-Lance, Kellogg, Kraft, McKee Foods, PepsiCo, Sargento Foods, Shearer's Foods and Utz Quality Foods
- Discussions and data on pricing, advertising expenditures by media and demographics
- Beverage Marketing's exclusive five-year projections for snack and candy market segments

Snack Food in the U.S.

2014 Edition
July 2014



RESEARCH • DATA • CONSULTING

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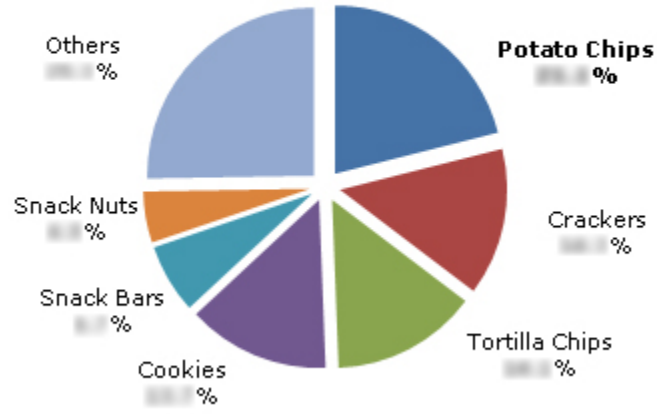
U.S. SNACK FOOD MARKET
SHARE OF ESTIMATED WHOLESALE DOLLAR SALES BY SEGMENT
2008 – 2013

Category	2008	2009	2010	2011	2012	2013
Potato Chips	28.1%	28.2%	28.3%	28.4%	28.5%	28.6%
Crackers	18.2%	18.3%	18.4%	18.5%	18.6%	18.7%
Tortilla Chips	12.3%	12.4%	12.5%	12.6%	12.7%	12.8%
Cookies	10.1%	10.2%	10.3%	10.4%	10.5%	10.6%
Snack Bars/Granola Bars	8.5%	8.6%	8.7%	8.8%	8.9%	9.0%
Snack Nuts/Seeds/Corn Nuts	6.7%	6.8%	6.9%	7.0%	7.1%	7.2%
Pretzels	5.9%	6.0%	6.1%	6.2%	6.3%	6.4%
Fruit Snacks	5.2%	5.3%	5.4%	5.5%	5.6%	5.7%
Cheese Snacks	4.8%	4.9%	5.0%	5.1%	5.2%	5.3%
Dried Meat Snacks	4.5%	4.6%	4.7%	4.8%	4.9%	5.0%
Rice/Popcorn Cakes	4.3%	4.4%	4.5%	4.6%	4.7%	4.8%
RTE Popcorn/Caramel Corn	4.1%	4.2%	4.3%	4.4%	4.5%	4.6%
Pork Rinds	3.9%	4.0%	4.1%	4.2%	4.3%	4.4%
All Others*	3.5%	3.6%	3.7%	3.8%	3.9%	4.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

* Includes snack cakes, corn snacks, other salted snacks, other non-salty snacks and other miscellaneous snacks.

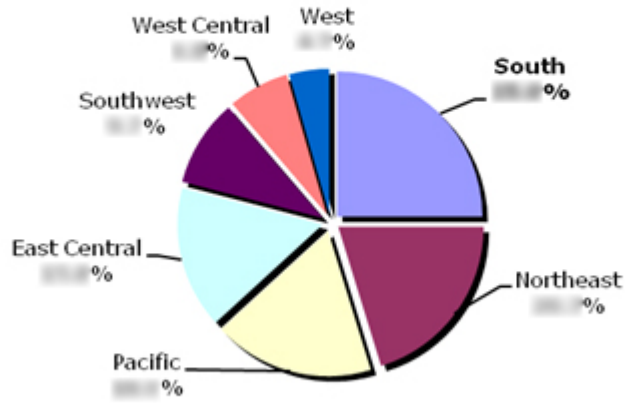
Source: Beverage Marketing Corporation

POTATO CHIPS LEAD SNACK FOOD MARKET
Share of wholesale dollars by segment, 2013



Source: Beverage Marketing Corporation

SOUTH LEADS U.S. SNACK FOOD SALES
Shares of wholesale dollars by region, 2013



Source: Beverage Marketing Corporation

The U.S. snack food industry in the first dozen years of the twenty-first century saw several changes in corporate structures as a result of mergers and acquisitions, bankruptcies or other types of restructurings.

- In 2008, for instance, Archway entered bankruptcy proceeding and the cookie concern ended up being acquired by Lance, Inc.
- Two years later, Lance merged with Snyder's of Hanover to form Snyder's-Lance.
- In 2014, Snyder's-Lance sold its private label snack business to Shearer's Foods.
- P&G thought it had worked out a way to leave the snack food business by selling its Pringles brand to Diamond Foods (which had earlier purchased other brands, such as Kettle). Bookkeeping issues scuttled the deal, and P&G sold its potato chip trademark to Kellogg in 2012.
- Also in 2012, Hostess Brands entered Chapter 11 again after having done so just few years earlier and Kraft announced the name – Mondelez – it planned to use for its snack food business once it separated it from its other food operations, as it previously announced that it intended to do. The implementation of the Mondelez spin-off occurred later in the year. (It was not a precise snack food/non-snack food split. The Planters trademark, which covers both snack nuts and snack bars as well as other nut-based food products, remained with Kraft, for instance.)
- In 2013, different parts of Hostess Brands were sold to various parties. The high-profile trademarks most closely associated with the Hostess name, such as Twinkies, became part of a reconfigured limited liability company, also called Hostess Brands, owned by Metropoulos & Company and Apollo Global Management.
- Flowers Foods acquired Wonder Bread, Nature's Pride, Home Pride, Butternut and Merita.
- McKee Foods purchased Drake's Cakes.
- Following a disruption in production of Hostess snack cakes while the earlier Hostess Brands was disassembled, the Metropoulos/Apollo-steered Hostess Brands returned the snack cakes to store aisles in summer 2013.
- For its part, McKee Foods relaunched some Drake's Cakes products later in the year.