



Snacks in Western Europe

January 2025

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REGIONAL OVERVIEW

Western Europe will be the least dynamic region in terms of sales growth over 2024-2029

Positive growth expected for snacks in the coming years

Western Europe has the biggest confectionery market among the global regions

HFSS regulations come into force in the UK

Turkish snacks sales recording very strong growth in the last three years

Savoury snacks adds the most new sales in 2019-2024

Taste and indulgence remain key, but HFSS regulation boosts health awareness in the UK

New regulation means large retail chains must offer gluten free products in Turkey

Hypermarkets lead in the UK and France, and supermarkets in Italy and Spain

Turkey joins Germany as a country in which discounters is the biggest sales channel

LEADING COMPANIES AND BRANDS

Private label continues taking share from the leading brand manufacturers in Turkey

Still room for premium brands to flourish despite cost-of-living crisis

“Made in France” and limited editions popular in the French snacks market

Number of HFSS-compliant products increasing in the UK

FORECAST PROJECTIONS

Positive growth expected for snacks over most of the forecast period

HFSS likely to continue impacting the UK market in the next few years

Healthier snacks likely to see increasing demand across the region

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Austria: Competitive and Retail Landscape

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