The Grocer

MASTERCLASS

BISCUITS CATEGORY

Mondelēz International
SNACKING MADE RIGHT

Driving excitement and category value

As a nation of biscuit lovers, the category is truly embedded into our heritage and culture, with moments and rituals like elevenses, afternoon tea and dunking being part of daily life.

Worth £4.2bn[1] the category makes up 15% of total snacking value[2], with 99.2% of households purchasing biscuits in 2024[3], confirming them as a cupboard staple. Shoppers continue to choose biscuits as an affordable and necessary indulgence. The category is growing by 2.7% in value[4] and splits into three key segments: sweet, savoury and healthier*.

Sweet biscuits, including brands such as OREO, Cadbury biscuits and LU, are the largest sub-segment, at 64% of sales[5].

With 67% of category sales accounted for by brands[6], half of all consumers stick with their preferred brand[7].

Shopper missions in the category can be broadly divided into two main areas – take home and on-the-go. Sweet biscuits have a higher share of 'take home sales' and 'healthier' biscuit sales are more weighted to on-the-go compared to other sectors.

Biscuits can help consumers meet a range of need states, whether that's fuel throughout a busy day or indulgence, as well as gifting and sharing. However, taste is crucial.

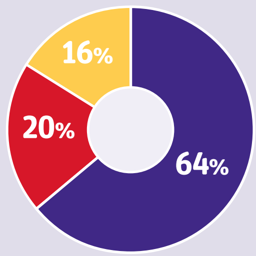
Insight into different shopper and consumer need states drives category value, as does differentiated product innovation. New products also engender excitement in the category, with 53% of shoppers looking to trial new flavours[8].

As such, stores can help to grow their biscuit sales with a range based on consumer insight, innovation and investment.

[1] Nielsen Total Biscuits, Total Market incl discounters, Value sales 52 w/e 06.09.25; [2] Euromonitor Consumption per capita average 2010-2023, Biscuits June 2024 excl modelled data, UK&I; [3] Kantar Worldpanel, 52 w/e 29.09.24; [4-6] See 1; [7-8] Mondelēz 5Ws 2024. *As defined by NielsenIQ

Total category value

TOTAL BISCUITS: £4.2bn
SWEET: £2.7bn
HEALTHIER: £814m
SAVOURY: £682m



Source: Nielsen, Total biscuits, Total market incl discounters, Value sales 52 w/e 06.09.25

Branded manufacturer shares

Branded manufacturer shares	£m
Pladis UK	747.2
Mondelez International	371.1
FBC UK	345.6
Nestlé Rowntree	150.3
Lotus Bakeries	116.7
Kellanova	100
General Mills	85.1
Tunnock's	75.5
Quaker	48.9
Ferrero	46.3
Ryvita	45.8
Bahlsen Biscuits	41.5

Source: Nielsen, Total biscuits, Total market incl discounters, Value sales 52 w/e 06.09.25

Grow your biscuit category by offering a range based on insight, innovation and investment

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BISCUITS CATEGORY

Trends in the aisles

Understanding the biscuit shopper

Key to optimising any biscuit range is ensuring the latest consumer need states are met. Consumers are at the heart of everything Mondelez does, and the company invests heavily in insight to ensure it maintains a deep understanding of those shoppers, which shapes our category and innovation investment.

Indulgence

Growing across many categories including biscuits, indulgence is the fastest-growing need in snacking, accounting for 1 in 5 snacking occasions - up from 13% in 2018[9].

In sweet biscuits, the indulgence need state is ever more significant, growing from 17% to 25% between 2018 and 2024[10]. In the biscuit category, these consumers are looking for traits such as indulgence, high quality, rich taste, texture and products containing chocolate, and they are often looking for a moment of relaxation or a reward[11]. Conversely, 7 out of 10 'indulge and pamper' biscuit buyers also buy everyday treat biscuits – pointing to the importance of range[12]. Finally, consumption of more indulgent biscuit tends to peak mid-afternoon and evening[13].

Value

While many shoppers are looking for affordable, familiar treats during these times, we also know that value has different meanings to different consumers.

While price remains important, value is more than just the financial cost to the consumer. Value encompasses a range of factors, such as time, quality, gift worthiness, experience and reward. So, though value is – and will continue to be – important for shoppers, they are prepared to balance these elements across their total needs, rather than focusing simply on price. Mondelez's portfolio offers something to suit all shopper needs.

The importance of brands

Favourite brand is a key driver of choice in the biscuit category, even in difficult times. Premium brands provide a way of creating a special moment, however mainstream brands are still selected for indulgent moments, a choice predominantly driven by affordability consideration. So, biscuit ranges need to have both premium and mainstream offers. Also, 96% of consumers think chocolate is important in a sweet biscuit for an indulgent occasion[14].

Wellbeing

There is undoubtedly a long-term consumer trend towards wellbeing – both physical and emotional – that comes into consideration when purchasing snacks. 73% of UK consumers consider wellness a top priority[15]. Most shoppers take a balanced approach: 38% claim to eat in a healthier way most of the time while having treats now and again, while 43% eat what they consider to be less healthier treats on a regular basis[16]. Demand for vegetarian and vegan alternatives is growing[17], while moments of indulgence are increasingly important, particularly for younger adult consumers[18] as a way to wind down and reduce stress.

Sustainability

Sixty-one per cent of consumers say sustainability is more important to them than it was two years ago, and 54% feel they can make a difference to the world with choices they make[19]. Consumers are undoubtedly making choices based on sustainable claims to a great degree in the category.

Occasions

Biscuits are typically eaten at home with 94%[20] of occasions at home – and 26% of these occasions alone are within special treat consumption[21]. Often, consumption is with a hot drink, particularly with indulgent biscuits[22].

[9-10] Mondelez Insight & Analytics, Demand Needs 2024; [11-14] Human8, Indulgence & Pamper Biscuits, September 2024; [15] Shopify, Health & Wellness trends shaping the industry, April 2024; [16] IGD Shopper Vista 2024; [17] IGD Shopper Vista, July 2022; [18] Watchme think/Mintel: The not so healthy snacking habits of Gen Z, plus Cajole UK, 2021; [19] Kantar Global Monitor 2023; [20] Kantar, Usage panel data 2021; [21] Kantar, Demand spaces usage data, June 2024; [22] See 11-14

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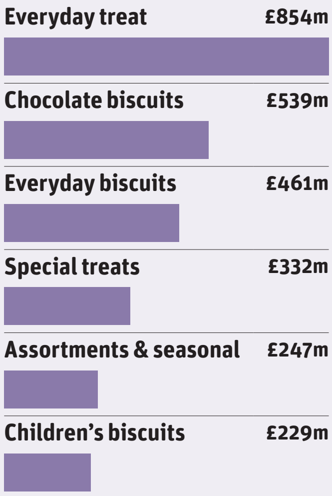
Biscuit sub-categories by value (£m)



Source: Nielsen, Total biscuits, Total market incl discounters, Value sales 52 w/e 06.09.25

Purchase drivers

Embracing a sense of style and occasion

Sweet biscuits is the largest segment of the category, accounting for 64%[23] and catering to a variety of need states within different sub-categories.

Everyday treat is the largest sub-segment, with brands like OREO helping to drive value and trade-up opportunities from the everyday biscuit sub-category. OREO plays a key role, attracting the next generation of biscuit-lovers, with investment linking it, as the world's No.1 biscuit[24], to popular culture via campaigns that target Millennials and Gen Z. In 2025, the brand partnered with A Minecraft Movie, and more recently, launched OREO Night Twist – both helping to create excitement and engagement with consumers.

The special treat sub-category, which has seen growth in the last 12 months is ideally placed for consumers wanting to indulge and 'de-stress'. Cadbury, one of the top special treat biscuit brands – including Cadbury Dairy Milk Fingers, Cadbury Cookies, Cadbury Crunchie Melts and Cadbury Snack. Cadbury Fingers 114g – is the No.1 branded SKU in the special treat sub-category[25]. Established in 1897, Cadbury Fingers is anchored in family sharing moments, while the brand's 'Sign with Fingers Big and Small' campaign continues to get Britain learning British Sign Language, with the goal of ensuring no one is excluded from the conversation. It also celebrates the role of Cadbury Fingers in helping people come together for everyday interactions. Go to https://signwithfingers.cadbury.co.uk/ to access sign language lessons.

Premium biscuits

LU is the fastest-growing brand in the special treat biscuits segment, up +28.7% value and with a +1.4ppt share[26]. A recent redesign, highlighting its premium quality and French heritage, features bold bright colours to differentiate each biscuit in the range. Consumers increasingly look for biscuits that meet their demand for indulgence and pampering – and LU brings the authentic flavour of the French bakery to UK shelves. LU's fresh, sophisticated new packaging elevates the brand's identity and market differentiation.

Seasonal occasions

Mondelez International has a range of biscuits to tap into special seasonal occasions, bringing excitement to shoppers as Christmas approaches and providing an offer that is perfect for sharing with family and friends.

OREO's range includes the return of limited-edition OREO Gingerbread, one of 2024's biggest branded seasonal launches[27]. In addition, a new OREO Assortments pouch features three different types of OREO. Mondelez is also bringing back OREO White Enrobed, its No.1 festive biscuit in 2024[28].

Cadbury Snowy Fingers – the winter twist on the classic Cadbury Fingers with a milk and white chocolate coating – is also returning to shelves for 2025, alongside Cadbury Festive Animals, both designed to tap into more festive joy.

[23] Nielsen Total Biscuits, Total market incl discounters, Value sales 52 w/e 06.09.25; [24] Euromonitor Int. Ltd/Snacks 2026 ed – Sweet Biscuits Category definition, brand share 2025, Retail value sales; [25] Nielsen, 52 w/e 11.10.25; [26] Nielsen discovery, Total coverage, 52 w/e 24.05.25; [27] NielsenIQ Market: Total coverage incl discounters, 52 w/e 28.12.24; [28] Mondelēz International internal data

Meeting the need for health & wellbeing

Mindful consumption

With consumer interest in wellbeing set to continue, the future is positive for this segment of the biscuit category. In fact, on-the-go shopper missions in healthier* biscuits have risen by 6%[29] year-on-year.

Brands such as belVita and Cadbury Brunch are therefore key pillars of a retailer's snacking offer, providing a variety of formats and flavours.

belVita offers a range of tasty flavours for lasting fulfilment, and the entire soft baked range and best-selling baked biscuit range is non-HFSS.

Recently, belVita launched a limited-edition belVita Duo Crunch Choco Hazelnut, a combination of chocolate – the No.1 flavour in healthier* biscuits[30] – high fibre and belVita's signature blend of five wholegrains.

+See details below right

The Cadbury Brunch range is where delicious ingredients meet irresistible flavour. Each bar blends satisfying oats, crispies and bran flakes with a drizzle of honey and indulgent Cadbury chocolate. The brand recently launched standout packaging with bold graphics that highlight its taste credentials and ingredients. The new packaging dials up Cadbury's distinctive purple, while maintaining its position as a great grab-and-go snack.

The Cadbury Brunch range now includes a new value pack of 10 bars for the No.1 SKU in healthier* biscuits[31], Chunky Choc Chip, aiming to meet the needs of families and shoppers looking for better value.

Savoury enjoyment

The savoury category accounts for 16% of all biscuit sales and is in value growth, with Ritz

the No.1 branded cracker in the category[32].

A timeless classic snack, Ritz has been a household staple, known for its moreish, buttery taste and signature scalloped edge since 1961 in the UK. Oven-baked in sunflower oil Ritz crackers bring a familiar, feel-good crunch whether stacked with toppings, served with dips or eaten on their own and add enjoyment to any occasion – from lunchboxes and picnics to family gatherings and parties. Suitable for vegetarians.

[29] Kantar TH + OTG Shopping Missions, 12 w/e 12.03.24, Q1 23 vs Q1 24; [30] Belvita in GB_Groc Mults during 52 w/e 01.02.25; [31] Nielsen Discover, Total coverage incl. discounters, Total biscuits, Healthier. Cadbury Brunch Oats, 52 w/e 11.07.25; [32] Nielsen, Total biscuits, Total market incl discounters, Value sales 52 w/e 06.09.25
*NielsenIQ defined. + **Note:** Cadbury Brunch Bars come in Choc Chip, Raisin, Bournville and Peanut options. Cadbury Brunch Light Bars, which are non-HFSS, are 47% less sugar for the Golden Honey version and 38% less sugar for the Zesty Orange version than standard Cadbury Brunch bars.

The Harmony Wheat Charter

The Harmony Wheat Charter is Mondelez International's pioneering sustainable wheat programme; a regenerative charter that aims to have a lasting impact by contributing to its net zero commitment, reversing biodiversity losses, supporting farmers in transitioning to regenerative agricultural practices while driving wheat quality in biscuits. Over 1,100 farmers in 7 European countries are involved in the programme. For more details go to Harmony.info