

The Grocer

Focus On: Crisps, Nuts & Bagged Snacks

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Intro: It's crunch time for bagged snack brands, which since January have been banned from advertising high fat, salt and/or sugar (HFSS) products on TV before 9pm and banned outright from advertising online.

- How has HFSS impacted sales?
- How has HFSS changed retailer and supplier strategies?
- What other factors are influencing the snacking category?

Reformulation: There's been no shortage of HFSS-compliant product innovation in the past year. Despite this, campaigners say efforts to reduce salt and fat content don't go far enough.

- Who's leading the way on HFSS-compliant reformulation?
- What percentage of crisps, nuts and bagged snacks sales are HFSS-compliant?
- What have been the most successful HFSS-compliant launches?
- What challenges need to be overcome in making snacks HFSS-compliant?
- 'Healthier' chocolate has never taken off – is it easier or more difficult to make savoury snacks healthier? Why?
- Do consumers understand what HFSS regs are... and do they care?

The Nutrient Profiling Model: In January, the government updated its Nutrient Profiling Model – the mechanism used to determine whether food and drinks is deemed HFSS, sparking criticism from the industry.

- How has the NPM been changed?
- Why has it been changed and when will it come into use?
- What impact will this have on the bagged snacks industry?

Advertising: The long delayed clampdown on advertising HFSS food and drink came into force in January, banning online advertising outright and banning TV ads before 9pm.

- Exactly what kind of adverts are banned and are any still allowed?
- How have brands and retailers responded?
- Has it had any impact on sales?
- Is there any evidence that suggests HFSS regs have had a positive impact on people's health?
- What's next in terms of HFSS regulation?

Consumer perspectives: We will be working with our research partner Vypr to explore consumer perspectives on snacking.

- Do people understand what HFSS regs are?
- Do they care?
- Do they support government efforts to help them make healthier choices?
- Do people want to eat healthier snacks?
- Or do they just want to treat themselves?
- What kind of snacks do they look for when they're after a treat or something healthy?

Nuts: Nuts have several health benefits – including being high in fibre and protein – although they can also be high in salt.

- Where do nuts sit in terms of HFSS regulations?
- How are they performing in terms of sales?
- What are brands and retailers doing to drive growth?
- What packaging formats are in growth or decline?
- When, where and why do people eat nuts?
- How can nuts be made healthier?

Popcorn: A few years back, many industry commentators were tipping popcorn to be the next big thing in snacking.

- How has the popcorn category performed in the past year?
- Where does popcorn sit in terms of health?
- What percentage of popcorn sales are HFSS-compliant?
- What have brands and retailers been doing – in terms of NPD, deals, marketing, etc – to drive growth?

Flavour innovation: Ready salted, salt & vinegar and cheese & onion have long been the holy trinity of crisp flavours, but what new flavours are gaining ground?

- What flavour trends are shaping the category?
- What have been the most successful new flavour launches in crisps, nuts, popcorn etc, in the past year?
- How do brands ensure new flavours actually drive incremental growth and don't cannibalise existing lines?
- How important are 'limited-edition' flavours and what are their benefits?
- What will be the next big thing in terms of snack flavours?

Innovation: We will be profiling five new product launches – ideally products that have not yet been launched and haven't been featured in the press. We need: launch date; rsp; pack weight/volume; stockist details; full product details and a high resolution pack shot.