The Grocer

MASTERCLASS
BISCUITS CATEGORY

Mondelēz International
SNACKING MADE RIGHT



Driving category value in biscuits

We are a nation of biscuit-lovers. The category has a penetration of over 99%[1], and biscuits are the most frequently purchased impulse category[2]. Indeed, biscuits are truly embedded into our heritage with rituals like elevenses, afternoon tea and dunking part of our daily lives.

Half of consumers indulge in biscuits twice a week with 60% having a biscuit with a hot drink[3]. Biscuits also bring out our sociable side, with 55% consuming biscuits with two or more people[4]. Over 50% of consumers are also keen to try new flavours while half stick to their favourites[5].

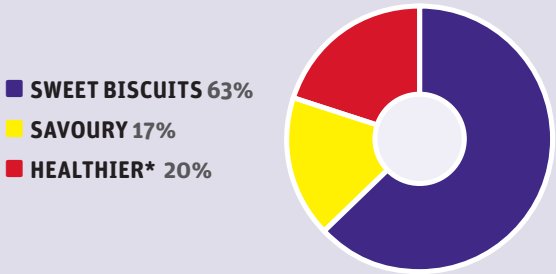
The category is worth over £4bn and growing in value at +2.2%[6]. The market is split into three main segments: sweet, savoury and healthier*. Sweet biscuit sales account for 63% of the category value[7] and include brands such as OREO, Cadbury Biscuits and LU. Healthier* biscuits such as belVita are the second-biggest segment in terms of value followed by savoury biscuits like Ritz[8].

The category divides into two main shopper missions: on-the-go and take home, with 76% of biscuit occasions happening at home[9]. Biscuits help consumers meet a range of need states from an everyday treat, an indulgent moment, a means of nourishment to satisfy hunger, or a shared moment. Regardless of need state, taste is crucial to biscuit consumption.

By truly understanding what motivates biscuit shoppers, we can drive category value, and stores can help to grow their biscuit sales by ensuring they have a range based on insight, innovation and investment.

Source: [1] World Panel by Numerator. 52 w/e 09.08.26; [2] Impulse excl. soft drinks. Worldpanel by Numerator. 52 w/e 09.08.26; [3] Mintel, Sweet biscuit snacking, Biscuits, March 2024; [4-5] MDLZ 5W's2024; [6] NIQ, OS RMS Biscuits, Total Coverage, MAT value, w/e 08.08.26; [7] NIQ, OS RMS Biscuits, Tot Coverage, YTD value, w/e 08.08.26; [8] NIQ, OS RMS Biscuits, Total Coverage, YTD value sales w/e 08.08.26; [9] Mondelēz demand spaces (March 24, data 52 w/e 22.01.24); * As defined by Nielsen.

Share of biscuits by type



Source: NielsenIQ, OS RMS Biscuits, Total Coverage, YTD value sales, w/e 08.08.26

Manufacturers' performance (MAT value)

Mondelez International	£367.6M
Pladis UK	£762.9M
FBC UK	£357.9M
Nestlé Rowntree	£160,5M
Lotus Bakeries	£126.7M
Kellanova	£101.7M
General Mills	£84.9M
Ferrero	£83.2M
Tunnock's	£75.1M
Mars	£65.0M
Bahlsen Biscuits	£45.8M

Source: Nielsen IQ, OS RMS Biscuits, Tot Coverage, MAT value, w/e 08.08.26

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

Cadbury · OREO · belVita · LU · RITZ · Barny · Mikado

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Understanding what motivates shoppers

Identifying shopper needs

Understanding consumers is at the heart of everything we do at Mondelez International and we invest heavily in research to ensure continued deep insight into current and future shopper trends.

Value and affordability

Affordability is the number one purchase driver when shoppers are choosing new food and drinks products, with consumers prioritising it, ahead of other drivers such as health and convenience[10]. Shoppers are also trading frequency for value, with biscuit occasions per buyer in slight decline while value per occasion increased, underlining the need for bigger packs, better value propositions[11] in snacking. Bigger packs are available in the OREO, belVita and Cadbury Brunch.

However, biscuits do have wide appeal with no significant difference in usage by income or financial situation, making the category somewhat resilient to pressures on household budgets[12].

Importance of brands

Brands account for 68%[13] of sales in the category and heritage brands provide emotional reassurance. UK consumers trust products with decades of history[14], and eating biscuits with a connection to childhood can also boost consumers' mood[15].

Occasions and indulgence

Most consumers say biscuits give them a chance to have a break in the day making the break the single strongest consumption driver ahead of textural appeal and nostalgia[16].

There is also a trend emerging of a 'justified treat' shopper mission, defined by fewer but better treats where shoppers use portion control and quality to signal 'worth it' while balancing indulgence with health cues[17].

Growth is shifting from small, single snacking formats to multipacks and XXXL sizes, reflecting a shift toward social 'at home' snacking occasions[18]. The lunch box occasion also over-indexes for biscuits when it comes to families[19], who see smaller formats and multipacks as a winning formula.



Wellbeing

Shoppers want organisations to take the lead on supporting their healthier needs. Forty-five per cent believe retailers and manufacturers should clearly label products and that suppliers should increase their NPD in the 'healthier' space[20], while 66% of biscuit buyers seek treats that make it easy to have a small portion[21].

Sustainability

Sustainable packaging is a secondary driver when it comes to purchasing, with the number of shoppers looking for new foods and drink products with minimal, sustainable, or easy-to-recycle packaging, coming below value for money and wellness considerations[22], but above other considerations.

Source: [10-11] NIQ Snacking trends, Tensions & Opportunities 2026; [12] Mintel UK, Sweet Biscuits UK 2024; [13] NielsenIQ, OS RMS Biscuits, Total Coverage, YTD value, w/e 08.08.26; [14] Flavours & texture trends, Social listening report UK, 2026; [15-16] Mintel Sweet Biscuits UK 2026; [17-18] See 10-11; [19] NIQ, Unpacking the lunchbox Occasion 2026; [20] Kantar Evolving Health June 2025; [21] See 15-16; [22] See 10-11

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Sweet biscuit sales by segment

Total sweet	1,560.9M
Everyday treats	537.5M
Chocolate biscuit bars	336.9M
Everyday biscuits	283.3M
Special treats	207,6M
Children's biscuits	133.1M
Sweet SYC+	62.4M

Source: NielsenIQ, OS RMS Biscuits, Total Coverage, Value sales, YTD w/e 08.08.26.
+SYC includes traditional, seasonal and assortments

How different products address different need states

Exploring the biscuits category by sector

Sweet biscuits: treats or opportunities

Sweet biscuits are the largest category segment, accounting for 63% of sales[23]. A variety of need states are catered for by sweet biscuits, from everyday treats to indulgence.

Everyday treat is the largest sub-segment with brands like OREO helping to drive value through trade-up opportunities from everyday biscuits. OREO plays a key role in attracting new biscuit-lovers, with investment linking it to popular culture. In 2026, OREO partnered with BTS and has continued to challenge consumers to 'Twist Lick and Dunk'. New flavours help create excitement and engagement with consumers.

Did you know that OREO is the world's No.1 biscuit brand[24]?



OREO has also recently launched a new pack for its Enrobed version, which enables indulgence on-the-go and the OREO Sharing Tray holds 36 biscuits, offering a bigger, better-value pack. The resealable tray format means it can be used for occasions where families and friends are gathering to enjoy time together.

The 110g OREO Mini Snack Bags are the perfect packs for friends and families looking for a fun shareable treat for a Big Night In occasion, as recent studies have shown that 67% of snacking occasions happen in the afternoon and evening[25].

Did you know that Cadbury fingers were first launched in 1897?

Cadbury's biscuit brands offer a special treat, ideal for consumers wanting to indulge. Cadbury Fingers brand has the highest equity score in the sweet biscuits segment[26] and is anchored in family sharing moments appealing to all ages.



Premium biscuits

LU sits in the special treat segment and brings authentic French bakery flavour to UK shelves. Its premium quality and sophisticated packaging elevate the brand identity and differentiate it on the biscuit shelf. In 2026, LU Le Petit Chocolat Noir joined the range.

Seasonal biscuits

OREO and Cadbury biscuits tap into special seasons with limited-edition offers at a range of price points. Both brands are perfectly positioned for the seasons, as they are rooted in playfulness and generosity, which resonates with consumers. Mondelez International's seasonal biscuits grew by 19% in 2025 versus 2024[27] and OREO's range included a Halloween Spooky and Christmas Gingerbread special edition, perfect for sharing with friends and family.

The OREO Yard has also proved popular, growing by more than 16% in 2025 versus 2024[28], bringing playfulness to seasonal gifting. OREO Enrobed White offers an indulgent twist on the classic style, as it's covered with a smooth white chocolate flavour cream.



Cadbury Fingers offers a special 'snowy fingers' option for Christmas and Cadbury Festive Animals bring a fun element to family sharing.

Source: [23] NielsenIQ, OS RMS Biscuits, Total Coverage, YTD value, w/e 08.08.26; [24] Euromonitor Int/Snacks 2026 ed – Sweet Biscuits Category definition, brand share 2025, Retail value sales; [25] Mondelez Demand Spaces (Mar24, data 52 w/e 22.01.24); [26] 2025 Brand Equity Deep Dive. UK Sweet Baked Snacks; [27-28] NielsenIQ Discover, Total Coverage, Value Sales, Total Biscuits, Show You Care, Seasonal, Cal Yr 2025 – w/e 27.12.25

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Satisfying a range of appetites

Exploring healthier and savoury options

Consumers continue to look for a variety of options to suit different snacking needs. Healthier* biscuits are an important part of this choice, with brands such as Cadbury Brunch and belVita, the No.1 and No.2 most penetrated brands in healthier* biscuits[29], offering a range of formats and flavours.

belVita offers a range of mainly non-HFSS biscuits^, all containing fibre and belVita's signature blend of five wholegrains.

In 2026, belVita launched its Minis product – belVita Honey and Chocolate Chip Minis – to give consumers even more choice when it comes to snacking throughout the day. BelVita Honey and Chocolate Chip Minis offer a convenient bite-sized format which is great for lunchboxes, while also supplying five wholegrains, high fibre, and a source of iron and calcium.



The brand also has bigger, better value packs in the range with 540g packs of its best cookie sellers!



The Cadbury Brunch range

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 Cadbury chocolate. Cadbury Brunch bars are available in four flavours, with the non-HFSS Cadbury Brunch Light range offering two additional flavours. The No. 1 SKU in the healthier segment is Cadbury Brunch Choc Chip[30], which now comes in a value pack featuring 10 bars. This format is designed to drive value and cater to larger households, supporting both shopper needs and retailer sales.

Savoury sensations

The savoury biscuit segment is worth £0.7bn and is growing at 5.1% value MAT[31]. Ritz is the No. 1 branded cracker in the category[32].

Ritz has offered consumers its signature moreish buttery taste and scalloped edge for 65 years!



Oven baked with sunflower oil, Ritz is a versatile snack that can be eaten on its own, stacked with toppings or served with dips – perfect for gatherings, picnics, family parties or lunch boxes.

For more information, visit snackdisplay.co.uk.

Harmony – 100% of the wheat volume needed for the European business' biscuits production is grown under the Harmony charter[33]. For more details go to Harmony.info

Source: [29] Kantar MyWorldpanel, Period End Date: 09-08-2026 Retailer: Total Market Transactions: Total Transactions Duration: 52 Weeks, Measure: Penetration; [30] Nielsen Discover, Total Coverages inc. Discounters, Total Biscuits, Healthier. Cadbury Brunch Oats, 52 w/e 11.07.25; [31] Nielsen MAT to 28.08.26; [32] Nielsen, Total coverage, UK Savory, July 2026, MAT. Ritz Cracker the Original 150g is the biggest single SKU in value and units, excluding private label products.

[33] Goal and reported information for wheat volume sourced under Harmony is based on 2025 data, on a controlled blending approach, which means that we aim to have a minimum of 70% of Harmony wheat in our products under our biscuit brands in Europe. For the remaining 30%, equivalent volumes for that portion are grown under the Harmony program but may not be purchased by Mondelēz International. For more information, visit Harmony.info

* As defined by Nielsen