



Snacks in Poland

July 2024

Table of Contents

Snacks in Poland

EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024

Table 2 - Sales of Snacks by Category: Value 2019-2024

Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024

Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Snacks: % Value 2020-2024

Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024

Table 7 - Penetration of Private Label by Category: % Value 2019-2024

Table 8 - Distribution of Snacks by Format: % Value 2019-2024

Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029

Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stakes are high in 2024 in discounters' price war

Rising cocoa prices lead to greater diversification in the category

Local consumers gravitate towards healthier and tastier chocolate confectionery

PROSPECTS AND OPPORTUNITIES

Ongoing price rises will see players re-evaluate procurement strategies in the years ahead

Alternative ingredients to cocoa are expected to gain traction in Poland

Marketing will become increasingly important in a highly competitive arena

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Bright outlook for gum in Poland in 2024
Younger demographics are key targets for gum players
Reduction in visits to retailers negatively impacts sales of chewing gum in 2024

PROSPECTS AND OPPORTUNITIES

Wrigley will retain its dominance of the category in the years ahead
Health and wellness trend will continue to drive innovation in gum in Poland
Effects of inflation are likely to be limited in the gum arena

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024
Table 26 - Sales of Gum by Category: Value 2019-2024
Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024
Table 28 - Sales of Gum by Category: % Value Growth 2019-2024
Table 29 - Sales of Gum by Flavour: Rankings 2019-2024
Table 30 - NBO Company Shares of Gum: % Value 2020-2024
Table 31 - LBN Brand Shares of Gum: % Value 2021-2024
Table 32 - Distribution of Gum by Format: % Value 2019-2024
Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029
Table 34 - Forecast Sales of Gum by Category: Value 2024-2029
Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029
Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sugar confectionery sees robust value growth in 2024
Discounters remains the leading distribution channel for sugar confectionery in Poland
Expansion of Ukrainian sugar confectionery gives the category a boost

PROSPECTS AND OPPORTUNITIES

Players will seek to diversify to tap into health and wellness trend
Expansion of private label will continue apace in the years ahead
Lack of sugar tax offers positive prospects for sugar confectionery

CATEGORY DATA

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024
Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024
Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024
Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024
Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024
Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024
Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024
Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024
Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029
Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029
Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Operational and production costs forcing major industry changes within ice cream

Players tap into demand for artisanal ice cream through speciality outlets

Collaboration between celebrities and manufacturers boosts sales

PROSPECTS AND OPPORTUNITIES

Competition within the category is set to intensify over the forecast period

Downsizing and premiumisation trends set to continue

Domestic brands are expected to perform well in the years ahead

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth across all metrics for savoury snacks in 2024

Potato chips remains the largest subcategory in savoury snacks

Enduring popularity of LKay's crisp brand sees Frito-Lay retain the top spot

PROSPECTS AND OPPORTUNITIES

Savoury snacks set to be transformed by health and wellness trend in the years ahead

Nuts, seeds and trail mixes will help drive category growth over the forecast period

Novel and international flavours set to boost demand across subcategories

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024
Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024
Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024
Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029
Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029
Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029
Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Poland

KEY DATA FINDINGS

2024 DEVELOPMENTS

The success of protein bars reflects Poland's burgeoning health and wellness trend in 2024
Private label benefits from weakened purchasing power and prominent displays in retailers
Marketing campaigns seek to grab consumers' attention

PROSPECTS AND OPPORTUNITIES

The convenience factor will remain key, favoured by on-the-go lifestyles
Innovation will continue to prioritise health and wellness
Category will likely consolidate in the years ahead

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024
Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024
Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024
Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024
Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024
Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024
Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024
Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024
Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024
Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024
Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024
Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024
Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024
Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024
Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024
Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024
Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029
Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029
Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029
Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.

- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-poland/report.