



# Passport

## **Sweet Biscuits, Snack Bars and Fruit Snacks in Pakistan**

Euromonitor International

July 2023

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# SWEET BISCUITS, SNACK BARS AND FRUIT SNACKS IN PAKISTAN

## KEY DATA FINDINGS

- Retail value sales increase by 28% in current terms in 2023 to PKR159 billion
- Sweet biscuits is the best performing category in 2023, with retail value sales rising by 28% in current terms to PKR159 billion
- English Biscuit Manufacturers (Pvt) Ltd is the leading player in 2023, with a retail value share of 51%
- Retail sales are set to rise at a current value CAGR of 18% (2023 constant value CAGR of 10%) over the forecast period to PKR363 billion

## 2023 DEVELOPMENTS

### Plain biscuits remain firm favourite at tea time

In Pakistan, biscuits are commonly consumed at tea time with plain biscuits one of the most popular options. Indeed, tea with biscuits is a cherished tradition for many consumers. During this tea time ritual, biscuits are often seen as a luxurious accompaniment to a hot cup of tea, offering both indulgence and satisfaction. Tea time biscuits also hold a cultural significance and are associated with hospitality in Pakistani households. When guests visit, serving a selection of biscuits alongside tea is a common practice to make them feel welcome. Nevertheless, consumption occasions are gradually shifting, with consumers becoming more open to biscuits as a snack between meals. TUC by LU has engaged in heavy advertising to promote its brand as a snack for between meals, with much success.

### English Biscuits Manufacturers (Pvt) retains leading position

English Biscuits Manufacturers (Pvt) leads sweet biscuits and indeed the overall category by a considerable margin. The player is the oldest biscuit manufacturer in the country and is highly regarded. It enjoys high brand equity and an unrivalled distribution network, where its products are available through more than 500,000 retail outlets nationwide. Peek Freans Sooper is the most popular biscuit brand in plain format, although its two flavours (cardamom and chocolate) have been also doing well. Smaller SKUs have made it possible for Peak Freans Sooper to penetrate consumers living in semiurban locations, with pricing strategies adapted for this target audience. Peek Freans Sooper has introduced a soft cake that has gained popularity in urban locations and widened its customer segmentation to incorporate kids as well.

### Fruit snacks and snack bars still garner little attention

A few artisans and small-scale manufacturers have started producing snack and fruit bars in Pakistan, although sales remain negligible in 2023. There is a growing focus on health and wellness among young adults, particularly mid- and high-income young adults in urban areas, which is attracting manufacturers into this area. Affluent consumers are aware of the evolving international trends, and are shifting towards snack bars that can be a healthy alternative to sweet-based products. These products carry high prices which place them out of reach for many mass consumers in Pakistan. Nevertheless, post-pandemic there is increasing interest in clean

eating and perceived healthy products with minimum artificial products. Introducing protein/energy bars with wider distribution in urban areas by local manufacturers could create growth opportunities.

## PROSPECTS AND OPPORTUNITIES

### Shift towards healthy eating promotes sales of protein/energy bars

Consumers in Pakistan are increasingly shifting towards healthier eating habits and embracing international trends and products. Following the COVID-19 pandemic, there has been a surge in awareness regarding clean and healthy products, with a focus on minimizing the consumption of artificial ingredients. Local manufacturers have an opportunity to capitalise on the health and wellness trend by introducing protein and energy bars on a larger scale. Moving forward, manufacturers are expected to expand their product offerings and tap into growing demand for nutritious and convenient snacks.

### Digital culture to support e-commerce sales

Pakistan has seen significant growth in internet and smartphone penetration, leading to increased adoption of e-commerce and online shopping. Sweet biscuit brands in Pakistan are expected to leverage e-commerce platforms and digital marketing to reach a wider consumer base, and deliver more convenience when shopping. There is also the opportunity to engage with consumers through personalized marketing campaigns. E-commerce flourished as an alternative distribution channel for sweet biscuits during the pandemic. The increase in the remote working population has also positively affected this, with local consumers who have shopped online appreciating the convenience of home delivery and wide range of products available.

### Consumers demand on-the-go impulse snacks

There is growing demand for convenient and portable snacks in Pakistan. Consumers' fast-paced lifestyles and the rising urbanization witnessed across the country is driving demand for snacks that can be consumed on-the-go. Sweet biscuits packaged in convenient formats, including single-serve, are gaining popularity in Pakistan. Manufacturers will respond by adapting key brands and products to suit the impulse purchasing occasion.

## CATEGORY DATA

Table 1 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023

'000 tonnes	2018	2019	2020	2021	2022	2023
- Wafers	-	-	-	-	-	-
- Plain Biscuits	127.9	136.8	145.2	153.3	161.0	168.4
- Filled Biscuits	85.8	89.6	92.7	95.0	99.9	104.6
- Cookies	41.6	46.0	51.0	55.0	59.1	63.1
- Chocolate Coated Biscuits	-	-	-	-	-	-
Sweet Biscuits	255.3	272.4	288.9	303.3	320.1	336.1
- Fruit and Nut Bars	-	-	-	-	-	-

- Protein/Energy Bars	-	-	-	-	-	-
- Cereal Bars	-	-	-	-	-	-
Snack Bars	-	-	-	-	-	-
- Processed Fruit Snacks	-	-	-	-	-	-
- Dried Fruit	-	-	-	-	-	-
Fruit Snacks	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	255.3	272.4	288.9	303.3	320.1	336.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023**

PKR billion	2018	2019	2020	2021	2022	2023
- Wafers	-	-	-	-	-	-
- Plain Biscuits	38.7	41.9	46.1	50.4	62.7	80.8
- Filled Biscuits	25.0	26.7	29.5	32.4	41.3	50.9
- Cookies	12.1	13.9	15.4	16.7	20.8	27.5
- Chocolate Coated Biscuits	-	-	-	-	-	-
Sweet Biscuits	75.9	82.4	90.9	99.5	124.8	159.2
- Fruit and Nut Bars	-	-	-	-	-	-
- Protein/Energy Bars	-	-	-	-	-	-
- Cereal Bars	-	-	-	-	-	-
Snack Bars	-	-	-	-	-	-
- Processed Fruit Snacks	-	-	-	-	-	-
- Dried Fruit	-	-	-	-	-	-
Fruit Snacks	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	75.9	82.4	90.9	99.5	124.8	159.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
- Wafers	-	-	-
- Plain Biscuits	4.6	5.7	31.7
- Filled Biscuits	4.7	4.0	21.9
- Cookies	6.7	8.7	51.7
- Chocolate Coated Biscuits	-	-	-
Sweet Biscuits	5.0	5.7	31.7
- Fruit and Nut Bars	-	-	-
- Protein/Energy Bars	-	-	-
- Cereal Bars	-	-	-
Snack Bars	-	-	-
- Processed Fruit Snacks	-	-	-
- Dried Fruit	-	-	-
Fruit Snacks	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	5.0	5.7	31.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023**

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Wafers	-	-	-
- Plain Biscuits	28.8	15.9	108.7
- Filled Biscuits	23.3	15.3	103.3
- Cookies	31.9	17.7	126.1
- Chocolate Coated Biscuits	-	-	-
Sweet Biscuits	27.5	16.0	109.7
- Fruit and Nut Bars	-	-	-
- Protein/Energy Bars	-	-	-
- Cereal Bars	-	-	-
Snack Bars	-	-	-
- Processed Fruit Snacks	-	-	-
- Dried Fruit	-	-	-
Fruit Snacks	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	27.5	16.0	109.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023**

% retail value rsp Company	2019	2020	2021	2022	2023
English Biscuit Manufacturers (Pvt) Ltd	48.9	49.5	50.0	49.6	51.1
Continental Biscuits Ltd	26.4	26.4	26.5	27.0	27.2
Ismail Industries Ltd	14.0	14.6	14.9	14.9	15.0
KS Sulemanji Esmailji & Sons (Pvt) Ltd	3.7	3.5	3.1	2.4	2.8
Asian Food Industries (Pvt) Ltd	3.2	3.2	3.2	3.1	2.4
Others	3.7	2.9	2.4	3.0	1.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Peek Freans	English Biscuit Manufacturers (Pvt) Ltd	49.5	50.0	49.6	51.1
Bisconni	Ismail Industries Ltd	14.6	14.9	14.9	15.0
LU Prince (Mondelez International Inc)	Continental Biscuits Ltd	7.3	7.4	7.6	7.7

LU Zeera Plus (Mondelez International Inc)	Continental Biscuits Ltd	4.9	5.0	5.2	5.3
LU Bakeri (Mondelez International Inc)	Continental Biscuits Ltd	3.8	3.7	3.9	3.9
LU Gala (Mondelez International Inc)	Continental Biscuits Ltd	3.2	3.2	3.3	3.3
LU Candi (Mondelez International Inc)	Continental Biscuits Ltd	3.3	3.3	3.3	3.3
Kolson	KS Sulemanji Esmailji & Sons (Pvt) Ltd	3.5	3.1	2.4	2.8
Mayfair	Asian Food Industries (Pvt) Ltd	3.2	3.2	3.1	2.4
Oreo (Mondelez International Inc)	Continental Biscuits Ltd	1.6	1.6	1.6	1.8
Others	Others	5.0	4.6	5.2	3.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 NBO Company Shares of Sweet Biscuits: % Value 2019-2023**

% retail value rsp Company	2019	2020	2021	2022	2023
English Biscuit Manufacturers (Pvt) Ltd	48.9	49.5	50.0	49.6	51.1
Continental Biscuits Ltd	26.4	26.4	26.5	27.0	27.2
Ismail Industries Ltd	14.0	14.6	14.9	14.9	15.0
KS Sulemanji Esmailji & Sons (Pvt) Ltd	3.7	3.5	3.1	2.4	2.8
Asian Food Industries (Pvt) Ltd	3.2	3.2	3.2	3.1	2.4
Others	3.7	2.9	2.4	3.0	1.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 LBN Brand Shares of Sweet Biscuits: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Peek Freans Sooper	English Biscuit Manufacturers (Pvt) Ltd	12.6	12.7	13.2	13.6
Peek Freans Rio	English Biscuit Manufacturers (Pvt) Ltd	8.5	8.5	8.6	9.0
LU Prince (Mondelez International Inc)	Continental Biscuits Ltd	7.3	7.4	7.6	7.7
Peanut	English Biscuit Manufacturers (Pvt) Ltd	6.3	6.4	5.5	5.7
LU Zeera Plus (Mondelez International Inc)	Continental Biscuits Ltd	4.9	5.0	5.2	5.3
Peek Freans Gluco	English Biscuit Manufacturers (Pvt) Ltd	4.9	4.9	5.1	5.2
Bisconni Chocolate	Ismail Industries Ltd	5.2	5.2	5.0	4.9

Chip Cookies					
Bisconni Cocomo	Ismail Industries Ltd	4.1	4.2	4.6	4.8
LU Bakeri (Mondelez International Inc)	Continental Biscuits Ltd	3.8	3.7	3.9	3.9
Peek Freans Party	English Biscuit Manufacturers (Pvt) Ltd	3.5	3.5	3.5	3.6
Peek Freans Lemon Sandwich	English Biscuit Manufacturers (Pvt) Ltd	3.4	3.4	3.5	3.6
Bisconni Chocolatto	Ismail Industries Ltd	3.4	3.5	3.4	3.4
LU Gala (Mondelez International Inc)	Continental Biscuits Ltd	3.2	3.2	3.3	3.3
LU Candi (Mondelez International Inc)	Continental Biscuits Ltd	3.3	3.3	3.3	3.3
Peek Freans Marie	English Biscuit Manufacturers (Pvt) Ltd	2.9	2.9	3.0	3.1
Mayfair	Asian Food Industries (Pvt) Ltd	3.2	3.2	3.1	2.4
Peek Freans	English Biscuit Manufacturers (Pvt) Ltd	1.9	2.2	2.0	2.0
Peek Freans Chocolate Sandwich	English Biscuit Manufacturers (Pvt) Ltd	2.2	2.2	2.2	1.9
Bisconni	Ismail Industries Ltd	1.9	2.0	1.9	1.9
Oreo (Mondelez International Inc)	Continental Biscuits Ltd	1.6	1.6	1.6	1.8
Peek Freans Chocolicious	English Biscuit Manufacturers (Pvt) Ltd	1.8	1.9	1.6	1.7
Jam Hearts	KS Sulemanji Esmailji & Sons (Pvt) Ltd	1.8	1.6	1.2	1.6
Peek Freans Jam Delight	English Biscuit Manufacturers (Pvt) Ltd	1.5	1.5	1.3	1.5
Kolson	KS Sulemanji Esmailji & Sons (Pvt) Ltd	1.7	1.5	1.2	1.1
Others	Others	5.0	4.6	5.2	3.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9** Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value  
2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	100.0	100.0	100.0	100.0	100.0	100.0
- Retail Offline	99.6	99.6	99.5	99.3	99.3	99.2
-- Grocery Retailers	99.6	99.6	99.5	96.1	96.0	95.7
--- Convenience Retail	3.3	3.6	3.7	3.7	3.9	4.1
---- Convenience Stores	-	-	-	-	-	-
---- Forecourt Retailers	3.3	3.6	3.7	3.7	3.9	4.1
--- Supermarkets	6.2	6.5	6.3	6.1	7.5	9.5
--- Hypermarkets	3.1	3.4	3.4	3.5	4.3	5.3
--- Discounters	-	-	-	-	-	-
--- Warehouse Clubs	-	-	-	-	-	-
--- Food/drink/tobacco specialists	12.1	12.9	13.1	12.4	11.7	11.5
--- Small Local Grocers	74.9	73.3	73.0	70.3	68.6	65.4
-- Non-Grocery Retailers	-	-	-	3.2	3.3	3.6
--- General Merchandise Stores	-	-	-	-	-	-



--- Apparel and Footwear Specialists	-	-	-	-	-	-
--- Appliances and Electronics Specialists	-	-	-	-	-	-
--- Home Products Specialists	-	-	-	-	-	-
--- Health and Beauty Specialists	-	-	-	3.2	3.3	3.6
--- Leisure and Personal Goods Specialists	-	-	-	-	-	-
--- Other Non-Grocery Retailers	-	-	-	-	-	-
-- Vending	-	-	-	-	-	-
-- Direct Selling	-	-	-	-	-	-
- Retail E-Commerce	0.4	0.4	0.5	0.7	0.7	0.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10** Distribution of Sweet Biscuits by Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	100.0	100.0	100.0	100.0	100.0	100.0
- Retail Offline	99.6	99.6	99.5	99.3	99.3	99.2
-- Grocery Retailers	99.6	99.6	99.5	96.1	96.0	95.7
--- Convenience Retail	3.3	3.6	3.7	3.7	3.9	4.1
---- Convenience Stores	-	-	-	-	-	-
---- Forecourt Retailers	3.3	3.6	3.7	3.7	3.9	4.1
--- Supermarkets	6.2	6.5	6.3	6.1	7.5	9.5
--- Hypermarkets	3.1	3.4	3.4	3.5	4.3	5.3
--- Discounters	-	-	-	-	-	-
--- Warehouse Clubs	-	-	-	-	-	-
--- Food/drink/tobacco specialists	12.1	12.9	13.1	12.4	11.7	11.5
--- Small Local Grocers	74.9	73.3	73.0	70.3	68.6	65.4
-- Non-Grocery Retailers	-	-	-	3.2	3.3	3.6
--- General Merchandise Stores	-	-	-	-	-	-
--- Apparel and Footwear Specialists	-	-	-	-	-	-
--- Appliances and Electronics Specialists	-	-	-	-	-	-
--- Home Products Specialists	-	-	-	-	-	-
--- Health and Beauty Specialists	-	-	-	3.2	3.3	3.6
--- Leisure and Personal Goods Specialists	-	-	-	-	-	-
--- Other Non-Grocery Retailers	-	-	-	-	-	-
-- Vending	-	-	-	-	-	-
-- Direct Selling	-	-	-	-	-	-
- Retail E-Commerce	0.4	0.4	0.5	0.7	0.7	0.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 11 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category:  
Volume 2023-2028**

'000 tonnes	2023	2024	2025	2026	2027	2028
- Wafers	-	-	-	-	-	-
- Plain Biscuits	168.4	175.5	182.5	189.4	196.1	202.6
- Filled Biscuits	104.6	108.9	112.9	116.9	120.7	124.6
- Cookies	63.1	66.9	70.5	74.0	77.4	80.7
- Chocolate Coated Biscuits	-	-	-	-	-	-
Sweet Biscuits	336.1	351.2	366.0	380.3	394.2	407.9
- Fruit and Nut Bars	-	-	-	-	-	-
- Protein/Energy Bars	-	-	-	-	-	-
- Cereal Bars	-	-	-	-	-	-
Snack Bars	-	-	-	-	-	-
- Processed Fruit Snacks	-	-	-	-	-	-
- Dried Fruit	-	-	-	-	-	-
Fruit Snacks	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	336.1	351.2	366.0	380.3	394.2	407.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 12 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category:  
Value 2023-2028**

PKR billion	2023	2024	2025	2026	2027	2028
- Wafers	-	-	-	-	-	-
- Plain Biscuits	80.8	90.1	100.4	111.2	122.3	133.6
- Filled Biscuits	50.9	54.8	58.6	62.6	66.7	70.9
- Cookies	27.5	33.2	39.0	44.6	49.6	54.2
- Chocolate Coated Biscuits	-	-	-	-	-	-
Sweet Biscuits	159.2	178.0	198.0	218.4	238.7	258.7
- Fruit and Nut Bars	-	-	-	-	-	-
- Protein/Energy Bars	-	-	-	-	-	-
- Cereal Bars	-	-	-	-	-	-
Snack Bars	-	-	-	-	-	-
- Processed Fruit Snacks	-	-	-	-	-	-
- Dried Fruit	-	-	-	-	-	-
Fruit Snacks	-	-	-	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	159.2	178.0	198.0	218.4	238.7	258.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 13 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: %  
Volume Growth 2023-2028**

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
- Wafers	-	-	-
- Plain Biscuits	4.2	3.8	20.3
- Filled Biscuits	4.1	3.6	19.1
- Cookies	6.0	5.1	28.0
- Chocolate Coated Biscuits	-	-	-
Sweet Biscuits	4.5	3.9	21.3
- Fruit and Nut Bars	-	-	-
- Protein/Energy Bars	-	-	-
- Cereal Bars	-	-	-
Snack Bars	-	-	-
- Processed Fruit Snacks	-	-	-
- Dried Fruit	-	-	-
Fruit Snacks	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	4.5	3.9	21.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 14 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028**

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
- Wafers	-	-	-
- Plain Biscuits	11.5	10.6	65.3
- Filled Biscuits	7.5	6.8	39.2
- Cookies	20.9	14.6	97.4
- Chocolate Coated Biscuits	-	-	-
Sweet Biscuits	11.8	10.2	62.5
- Fruit and Nut Bars	-	-	-
- Protein/Energy Bars	-	-	-
- Cereal Bars	-	-	-
Snack Bars	-	-	-
- Processed Fruit Snacks	-	-	-
- Dried Fruit	-	-	-
Fruit Snacks	-	-	-
Sweet Biscuits, Snack Bars and Fruit Snacks	11.8	10.2	62.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources