

Brand Background Review - Doritos

Group 5: Mia Buchholz, Jasper Deen, Fiona McGinnis, Olivia Sullivan

1. **Category and Market Share Trends** --A brief conceptual description (two sentences) of the growth trend for the entire category (not segment) over the last three years, with emphasis on the most recent year's percentage change versus the prior year. After your prose, show the specific category size (dollars) plus the percent change for each year in a table, not a graph.
 - a. Then a brief conceptual description (two sentences) of the brand's market share (percent of the entire category) trend over the last three years, with emphasis on the most recent year's share point change (difference) versus the prior year. After your prose, show the specific share levels and the share point changes (difference) for each year in a table, not a graph. Remember, difference means subtraction, not division

The US salty snack category was valued at \$27.7 billion in 2022, \$29.7 billion in 2023, and is estimated at \$30.3 billion in 2024. This shows steady category growth, with a 7.2% year-over-year increase from 2022 to 2023 and a 2% increase from 2023 to 2024.

US Salty Snack Category Growth 2022-2024

Year	Category Size	YoY% Change
2022	\$27.7 B	-
2023	\$29.7 B	+7.2%
2024	\$30.3 B	+2.0%

Doritos has seen steady market share growth from 2022 to 2024, starting at approximately 11% in 2022 and ending at 13% in 2024, with a \$3B to \$3.93B valuation. That is a +1.5 share-point increase from 2022 to 2023 and a +0.6 share-point increase from 2023 to 2024.

Doritos US Market Share Over Time (2022-2024)

Year	Doritos Sales	Category Size	Doritos Market Share	Share Point Change
2022	\$3.03 B	\$27.7 B	10.9%	-
2023	\$3.67 B	\$29.7 B	12.4%	+1.5 pts
2024	\$3.93 B	\$30.3 B	13.0%	+0.6 pts

2. **Brand Assets**--What are the brand's top five major, inherent strengths (including equities) that could be communicated to the consumer to grow the brand faster? Note, this is not about existing trends in the brand's business. It is only about the intrinsic

assets or components of the brand itself that could potentially be leveraged to tell the consumer in order to achieve new, incremental growth. A simple list of top five strengths in order of their importance.

1. Bold flavor.
2. More crunch (compared to crisp).
3. Integrity/thickness of the chip. The chips don't break in the bag.
4. Brand Legacy and nostalgic feelings.
5. Extra flavor on the chip leaves dust on fingers.

3. **Vulnerabilities**--What are the brand's five major vulnerabilities? This is not about trends in the business, but rather inherent aspects or components of the brand itself that are weak--notably, specific areas where some competitor could attack. A simple list of top five in order of their importance.

1. Some consumers dislike bold flavor.
2. Doritos leave dust on fingers.
3. Prone to scattering crumbs.
4. Doritos creates a loud eating experience.
5. The size of the chip is too big to eat in one easy bite.


4. **Uniqueness**--In one brief phrase, what is the single most important element that makes this brand unique from (better than) all other brands in the category? The primary advantage this brand has over other brands in the same category.



Bold flavor with every crunchy bite.

5. **Product Quality**--Utilizing simple phrases, list three main strengths and three main weaknesses of the quality of the physical product itself compared to major competitive brands. In other words, from the consumer's perspective, what is good and what is bad about the actual physical product. Note, this is only about "actual physical stuff" such as the functionality, the aesthetics, the efficacy, etc., so it would not include any aspects related to the image or marketing of the brand.

Strengths	Weaknesses
Bold Flavor	Loud, noticeable crunching sound
Crunch	Crumbs everywhere
Consistently stable product (intact in bag, full of flavor powder, less breakage)	Bold, Intense flavor

6. **Packaging**--List the five elements of the brand’s packaging (graphics or container) that are the most distinctive versus all other brands in the category? Each of the five must be true for all of the flavors, sizes, and items that are sold by the brand.

Elements	Description
Flavor Descriptions are Right Aligned	<p>All Doritos packaging includes the flavor description on the lower right side of the logo. This applies to variations on classic flavors, such as Flamin' Hot, Dinamita, and Simply. On these products, the sub-brand name is directly under the Doritos logo, while the flavor description remains right-aligned. Competitor products typically place the product flavor description directly underneath the chip logo (center aligned). Because all of Doritos’ flavor descriptions are on the right side, the brand logo is naturally emphasized over other identifying features.</p> 

<p>Sharp design and angles (Visual Sharpness)</p>	<p>All of the Doritos packaging and lettering use sharp angles to highlight the snack's boldness and emphasize its triangular shape. The rigid typeface, pointed icons, and triangle brand logo directly contrast with the typical soft edges and circles seen on chip packaging. By having lots of sharp angles, it depicts the intensity of the chip and differentiates itself from the natural chip shape (circle). On Doritos' packaging, there are barely any rounded edges. Ex. The Dinamita product line uses colorful graphics, and Flamin' Hot adds flames to the chip and packaging to highlight the intensity.</p> 
<p>Bold Doritos Logo</p>	
<p>Triangle Symbol</p>	<p>Triangle-themed branding, such as “Try Another Angle”, logo, etc.</p>
<p>Physical photo of product</p>	<p>Always high-definition.</p>

7. **Demographics & Psychographics**--Describe the three most highly developed aspects of the brand's consumer demographic profile? And, again, for psychographics. In other words, what makes this brand most unusual versus the average consumer? Highest numerical deviation in the index above the norm (100). List in one table the three

components for demographics and another table for psychographics, along with the actual index numbers for each. Please make sure you select factors that have adequate base sizes.

Doritos Demographics from MRI-Simmons:

Category	Index
Principal Shopper age 35-39	161
Any Child 0-17 Years	176
Household presence of 8 & 11 year olds	251

Doritos Psychographics from MRI-Simmons:

Category	Index
Top Brands: 32% Takis	897
Food: “Often I can be swayed by coupons to try new food products” 18% Agree	150
Food: “Fast food fits my busy lifestyle.”	151

8. **Brand Positioning**--In one very simple phrase, what is the brand’s current positioning? One single idea expressed in just a very few words. Said another way, what is the strategic essence of how the brand is portrayed to the consumer--NOT a line of copy from an ad, but rather the single differentiating strategic concept? What makes the brand unique? Then go on to explain (in two sentences) why this specific positioning is

especially important to the consumer compared to other brands in the category. And why would the consumer care?

Positioning: Doritos are the iconic triangle-shaped tortilla chip with **bold** flavor in every crunchy bite.

Portrayal to Consumer: Consumers shopping for Doritos want to quickly satisfy their cravings in a bold way. They choose Doritos for its tortilla-chip crunch, nostalgic flavors, and the yummy dust they get to lick off their fingers when they finish a bag.

9. **Competitor Positioning**--Identify the three major competitors to the brand and describe the positioning of each of these brands. One single, simple phrase (the one strategic idea) for each brand, as described in #8 above. Then explain (in one sentence) why each positioning is especially important to the consumer.
 1. Takis (Grupo Bimbo- Barcel USA)
 - a. **Strategic Idea:** Intense tortilla rolls packed with flavor and crunch.
 - b. **Why important to the consumer:** Takis delivers an aggressive crunch and bold chili-lime punch that appeals to consumers who want a flavorful and crunchy snacking experience.
 2. Cheetos (Frito-Lay-Pepsi-CO)
 - a. **Strategic Idea:** The signature cheesy, crunchy snack.
 - b. **Why important to the consumer:** Cheetos provides a crunchy yet airy snacking experience packed with cheesy flavor and spicy options.
 3. Lays (Frito-Lay-Pepsi-CO)
 - a. **Strategic Idea:** The everyday potato chip.
 - b. **Why important to the consumer:** Lay's provides a light and crispy chip with lots of flavor variety.

10. **Category Dynamics**--Describe the three factors most dramatically impacting the changing category dynamics--no more than two sentences each. Consider factors such as changes in: technology, raw material availability/cost, health & safety issues, distribution channels, retail pricing, legal or regulatory issues, product type/segment, consumer usage habits, purchase dynamics, and culture/societal values. Please make sure the three factors are discrete (not related) and explain how each one impacts this category. List the factors in order of their importance.

Factors	Description	Source
On-the-go snacking/ Needed Convenience	Younger generations snack more, prioritizing convenience in their busy, on-the-go lifestyles. In 2024, Circana's <i>New Product Pacesetters</i> reported that 46% of consumers snack 3 or more times per day.	Circana report
Financial Insecurity - Consumers Buying Less	Financial insecurity is prompting consumers to tighten their budgets, reducing spending on non-essentials such as salty snacks. Frito-Lay North America struggled in 2025, with revenue down 1%, and they raised prices enough to offset the fact that people are buying less of their products.	Pepsi-Co Q3 2025 8-K Pepsi-Co Lowering Prices 2026
Rising Health Consciousness	Consumers are increasingly seeking healthier snack options. According to the World Health Organization's Global Health Observatory, 73% of consumers now read nutrition labels when purchasing snacks, up from 45% in 2019.	Emergen Research

11. **Competitive Threat**--Which competitive brand represents the single most direct threat to our short-term growth? This competitor may be the fastest-growing brand in the category, or it may even be a small brand that has some critical advantage over our brand. Next, explain (in a sentence) why this brand is the greatest threat. Then go on to list (in phrases) that brand's top three assets and its top three vulnerabilities (as in the assets and the vulnerabilities questions up above)?

Takis are the most direct threat to the Doritos business. Takis contain significantly more "bold"/intense flavor than Doritos, outcompeting them on this primary point of difference. Takis' top three product assets are their very intense flavor, sturdier (rolled) chip, and being very crunchy. Their biggest vulnerabilities are the intense flavor, their messy eating experience (flavor on fingers), and high acidity, which, when eating many at a time, can cause gastroesophageal problems like heartburn. (Citric acid is the 4th ingredient listed of ~30 Takis ingredients, compared to being the 34th listed Doritos ingredient.)

12. **Advertising Expenditures**--Describe in a sentence the trend of advertising spending (total media dollars only) for the brand through the last three years, with emphasis on the percent change in the most recent year? After the prose, show the actual advertising dollar spending levels (plus percent changes) for each one of the last three years in a table, not a graph.

Doritos' total media advertising spend was highly volatile over the last three years, surging sharply in 2023 (\$35M), dropping significantly in 2024 (\$20M), and then rebounding strongly in 2025 (\$29M), with a +46.3% increase versus the prior year.

Doritos Brand Advertising Spending (\$ Million) from Vivvix/Ad Spender

2023	2024	2025
\$35M (+193.3%)	\$20M (-42.5%)	\$29M (+46.3%)

13. **Growth Opportunity**--Where would be the brand's single largest source for incremental market share growth (dramatic extra business) next year? This direction should be based on an existing brand advantage or marketplace dynamic (something specific that you uncovered), not some hope or dream. Then, in a sentence, justify exactly why this would generate a tremendous market share gain? Note, this is about generating incremental growth for the brand within its current category.

Introducing a higher-protein version of Doritos would leverage the brand's indulgent flavor to attract snackers who want additional nutrition alongside bold taste and crunch.

14. **Business Contribution**--What percent of the entire corporation's total U.S. sales does this single brand represent in the U.S. (proportion of the corporation's portfolio of all U.S. brands)? The purpose is to understand how important this brand is to the parent corporation within this country.

The Doritos brand represented approximately **12%** of Frito-Lay North America sales in 2023.

$$\frac{\text{Doritos sales } (\$2.744B)}{\text{Frito-Lay sales } (\$23.4B)} = 11.7\%$$

Work Cited

1. Mintel Salty Snack Overviews (2022-2025)
 - a. Category Market Values
 - i. Salty Snack - US - 2023
<https://clients-mintel-com.colorado.idm.oclc.org/report/salty-snacks-us-2023?fromSearch=%3Ffreetext%3Dsalty%2520snack%2520market%26resultPosition%3D6%26resultPosition%3D6>
 - ii. Salty Snacks - US - 2024
<https://clients-mintel-com.colorado.idm.oclc.org/report/salty-snacks-us-2024?fromSearch=%3Ffreetext%3Dsalty%2520snack%2520market%26resultPosition%3D3>
 - b. Salty Snacks - US - 2025
<https://clients-mintel-com.colorado.idm.oclc.org/report/salty-snacks-us-2025?fromSearch=%3Ffreetext%3Dsalty%2520snacks%26resultPosition%3D1>
 - c. Dorito's Sales 2022-2024:
 - i. <https://www.snackandbakery.com/articles/111705-state-of-the-industry-2024-tortilla-chips-gain-ground>
 - ii. <https://www.snackandbakery.com/articles/109436-state-of-the-industry-2023-consumers-crave-bold-flavors-in-their-tortilla-chips>
 - iii. <https://www.snackandbakery.com/articles/99118-state-of-the-industry-2022-tortilla-chips-continue-to-crunch>
2. X
3. The Forbidden Snack: Why Doritos are the Worst
<https://thesophian.com/the-forbidden-snack-why-doritos-are-the-worst/#:~:text=However%2C%20one%20of%20the%20explicit,Worse%2C%20Dorito%20dust%20stains>
4. X
5. <https://thesophian.com/the-forbidden-snack-why-doritos-are-the-worst/#:~:text=However%2C%20one%20of%20the%20explicit,Worse%2C%20Dorito%20dust%20stains>.
6. X
7. MRI Simmons Doritos Consumer Data:
<https://insights-mrisimmons-com.colorado.idm.oclc.org/v2/profile/brandcatalyst>
8. X
9. On-the-go snacking
 - a. [Circana report](#)
 - b. Financial insecurity
 - i. [Pepsi-Co Q3 2025 8-K](#)
 - ii. [Pepsi-Co Lowering Prices 2026](#)
 - c. Health
 - i. [Emergen Research](#)
10. Statista Salty Snacks

- a. <https://www.statista.com/study/179486/brand-kpis-for-salty-snacks-doritos-in-the-united-states/>
 - b. <https://www.statista.com/statistics/309346/industry-total-sales-of-salty-snacks-in-the-us/>
11. X
12. Doritos Total Ad Spend from Vivvix/Ad Spender
- a. 2023
<https://app-vivvix-com.colorado.idm.oclc.org/360/KMI/IntelliDrive/AppUI/Spas/AdvReview2/AdvReviewPage.aspx?.pl=AdvertiserReview&e=167383&t=139#!/advReview>
 - b. 2024
<https://app-vivvix-com.colorado.idm.oclc.org/360/KMI/IntelliDrive/AppUI/Spas/AdvReview2/AdvReviewPage.aspx?.pl=AdvertiserReview&e=1593990&t=118#!/advReview>
 - c. 2025
<https://app-vivvix-com.colorado.idm.oclc.org/360/KMI/IntelliDrive/AppUI/Spas/AdvReview2/AdvReviewPage.aspx?.pl=AdvertiserReview&e=1593990&t=118#!/advReview>
13. Healthy Snacking Trends in the US
- a. <https://www.statista.com/statistics/1115097/consumer-interest-in-nutritious-snacks-by-age-us/>
 - b. <https://www.innovamarketinsights.com/trends/healthy-snacking-in-the-us/>
14. Doritos's sales numbers
- a. Doritos US sales in 2023:
<https://www.nxtbook.com/sosland/sw/snac-world-official-state-of-the-industry-2024/index.php#/p/40>
 - b. Frito Lay NA sales in Q2 2023 (multiplied by four to approximate whole-year sales):
<https://www.bakingbusiness.com/articles/61873-frito-lay-quaker-curb-q2-revenue-gain-for-pepsico>