

20 CATEGORY 14 INSIGHT

MICROWAVABLE & READY-TO-EAT POPCORN



POPCORN & SALTY SNACKS

Consumers continue to adopt a snacking culture by consuming snacks anywhere, anytime. Nearly half of Americans (47%) purchase salty snacks for snacking throughout the day and 35% are buying more than previous years due to consuming snacks as meal replacements. As the snacking culture grows, manufacturers are developing snack products for just about every occasion including movetime.

Of the 6,010 new snack products launched in North America between January 2010 and August 2014, 422 of them were popcorn products. 396 of them carried the microwavable claim and 355 carried the non-microwavable claim (pre-popped). Although popcorn only accounts for 7% of snack products, there was a 94% increase from 2010 to 2014, showing overall growth for this category.

Consumers are concerned about the nutrition of snacks and place high importance on products with better-for-you attributes. The popcorn market has tapped into consumers' demand for healthier options and brands are launching low-calorie, all-natural snacks that still offer factors of indulgence so consumers can snack guilt-free.



LOYAL CONSUMERS

Consumers appear to be brand loyal when it comes to purchasing salty snacks. Less than one third (31%) agree that store brands are comparable to name brands in quality and taste.

TOP 15 POPCORN BRANDS BY NUMBER OF PRODUCTS JAN. 2010 - AUG. 2014

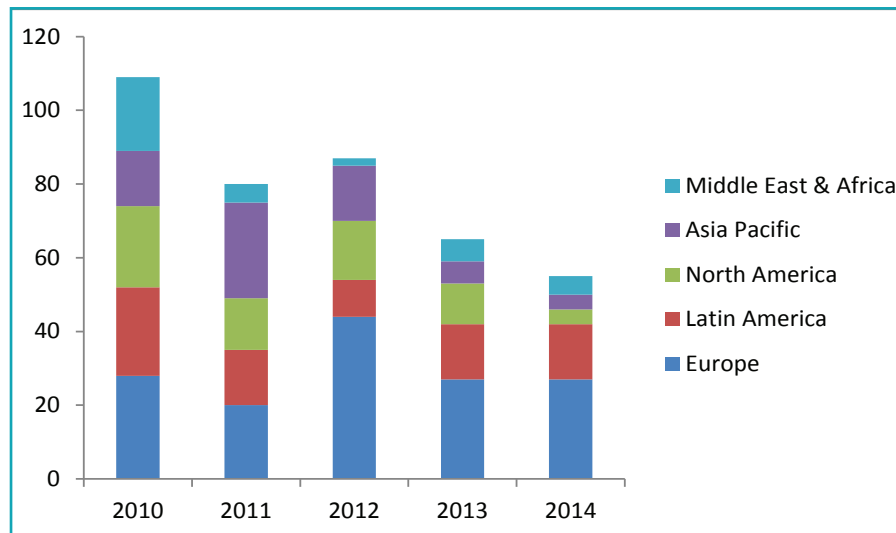
- Popcorn, Indiana
- Andie's
- Orville Redenbacher's Gourmet Popcornopolis
- Smartfood
- Act III
- Orville Redenbacher's Pop Up Bowl
- Market Pantry
- Pop Secret
- Good & Delish
- Kroger
- Nice!
- Popcorn Expressions
- G.H. Cretors

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MICROWAVABLE POPCORN GLOBALLY

GLOBAL NEW PRODUCT LAUNCHES BY REGION

Between January 2010 and August 2014 there have been **396** product launches with the microwavable claim. Europe has seen a 27% increase in product launches within this time period, followed by Latin America increasing 23%, North America increasing 22%, Middle East & Africa increasing 20% and Asia Pacific increasing 15%.



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GLOBAL PRODUCTS OF NOTE



NIGERIA: TNT FRUIT CHUTNEY FLAVORED MICROWAVE POPCORN

Described as a “perfect popping, great tasting, fresh, filling snack.” Kosher certified and retails in a 112g pack. (June 2014.)



SOUTH AFRICA: TOP OF THE POP BARBECUE FLAVORED MICROWAVE POPCORN

GMO-free and vegetarian. Retails in a single 200g pack. (April 2014.)



UK: POPZ WASABI FLAVORED MICROWAVE POPCORN

Gluten-free, wholegrain, high in fiber and free from trans fat. Retails in a box containing three 28g packs. (June 2014.)



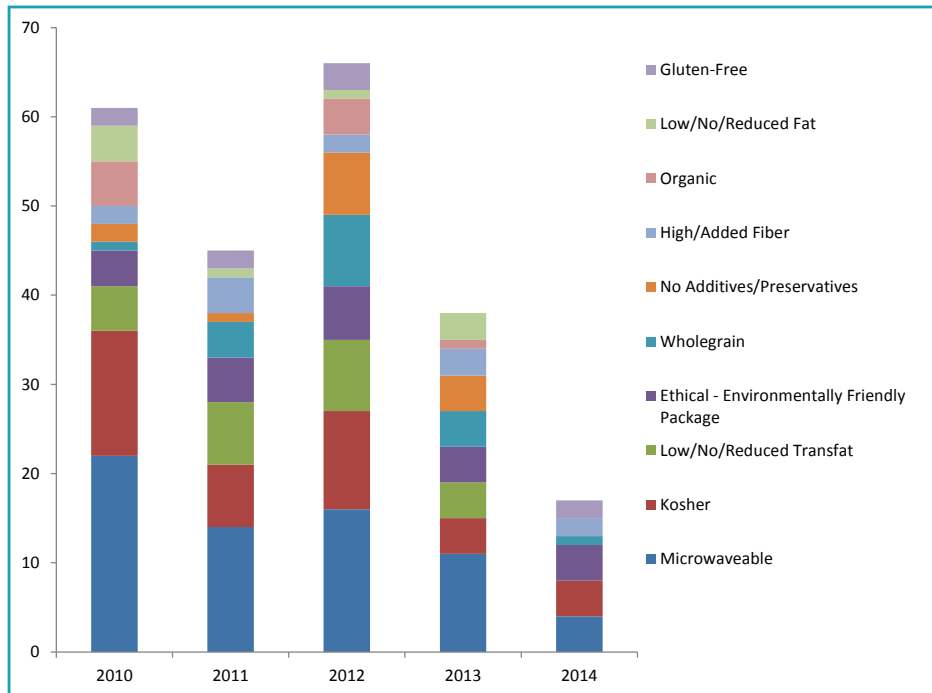
INDIA: AMERICAN GARDEN HOT N' SPICY POPCORN

Vegetarian, kosher certified and retails in a box containing three 91g packs. (March 2014.)

MICROWAVABLE POPCORN IN NORTH AMERICA

TOP CLAIMS

Of the **422** popcorn products launched between January 2010 and August 2014, **67** of them carried the microwavable claim. Behind microwavable, kosher has been the leading claim, increasing 14% between 2010 and 2014. Other top claims include Ethical - Environmentally Friendly Package, Wholegrain, Low/No/Reduced Transfat, No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, and High/Added Fiber.



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FLAVORFUL CRUNCH

Between January 2010 and August 2014 there have been **67** new products launched in North America.

Butter has been the leader of the top 10 flavor list from January 2010 to August 2014 with **35** new products launched. Salt/Salted comes in second with a total of 7 new products launched.

The majority of microwavable popcorn products have been flavored with classics like butter, caramel and cheese but we are starting to spot some new and interesting flavors and combinations:

- MAPLE SEA SALT
- GREEN APPLE CARAMEL
- SOUR CREAM & ONION
- JALAPENO PEPPER CHEDDAR CHEESE
- SALSA CHILI PEPPER
- OLIVE OIL & HERB

TOP 10 MICROWAVABLE POPCORN FLAVORS

JAN. 2010 - AUG. 2014

Butter
Salt/Salted
Bacon
Caramel
Parmesan Cheese
Lemon
Maple
Rosemary
Sea Salt
Cheddar Cheese

MICROWAVABLE POPCORN NEW PRODUCTS OF NOTE



POP SECRET SWEET 'N CRUNCHY SLIGHTLY SWEET PREMIUM CARAMEL POPCORN

Is said to pop up glazed and is kosher certified. Was launched in January 2014 and retails in a recyclable pack containing 3 pop-and-serve bags. Additional flavor includes Sweet 'n Crunchy Kettlecorn Slightly Sweet.



ASS KICKIN' ORIGINAL KETTLE CORN PREMIUM MICROWAVE POPCORN

Is said to be sweet and salty to perfection. Was launched in May 2014 and retails in a 3.5oz pack. Other flavors include Barbecue and Original Habanero.

SKINNY GIRL LIME & SALT POPCORN

Contains 100% wholegrain and 6g of fat and 25 calories per serving. Kosher certified and free from gluten. Was launched in August 2014 and retails in a 15oz. recyclable pack which contains 10 bags. Additional flavor includes Butter & Sea Salt.



QUINN BUTTER & SEA SALT MICROWAVE POPCORN

Made with organic, non-GMO and rBGH-free butter. Is free from gluten, hydrogenated oil, diacetyl and preservatives. Was launched in June 2014 and retails in a 3.5oz. "pure-pop" recyclable and compostable bag. This movie time snack was on display at the 2014 Sweets & Snacks Expo in Chicago.



ORVILLE REDENBACHER'S GOURMET NATURALS GARLIC BUTTER & SEA SALT FLAVORED MICROWAVE POPPING CORN

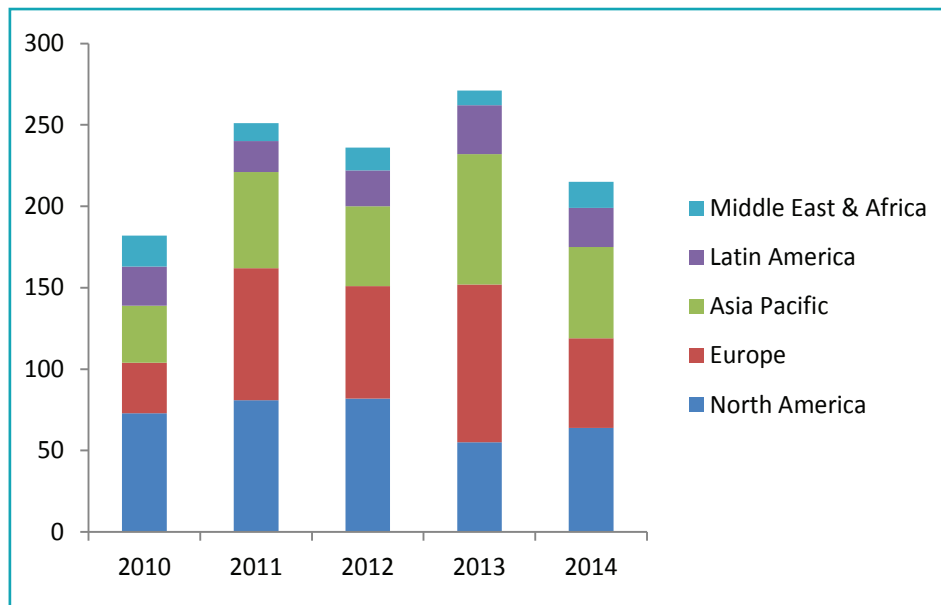
Made with natural ingredients and features 50% less fat than regular butter flavored microwave popcorn. 100% whole grain, gluten-free and kosher certified. Was launched in September 2013 and retails in a recyclable pack containing three Pop-Up-Bowl bags. Other flavors include Simply Salted & Classic Butter & Sea Salt.



READY-TO-EAT (RTE) POPCORN GLOBALLY

GLOBAL NEW PRODUCT LAUNCHES BY REGION

Between January 2010 and August 2014 there have been **1,155** new product launches excluding the microwavable claim. North America has seen a 72% increase in product launches in this time period, followed by Asia Pacific increasing 35%, Europe increasing 29%, Latin America increasing 23% and Middle East & Africa increasing 18%. Overall, new pre-popped popcorn products have increased in all regions since 2010.



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GLOBAL PRODUCTS OF NOTE



ITALY: PAM PANORAMA SALT FLAVORED POP CORN

Made with "carefully selected ingredients," is free from gluten and retails in a 100g package. (August 2014.)



GERMANY: JIMMY'S SWEET POPCORN

Described as being made with only the finest natural ingredients and is "honest, caring, safe and made with respect for man and nature." (August 2014.)



UK: PROPERCORN SWEET COCONUT & VANILLA FLAVORED POPCORN

Hand-popped and made with rapeseed oil, fresh coconut and Madagascan vanilla. Retails in a 25g pack. (July 2014.)



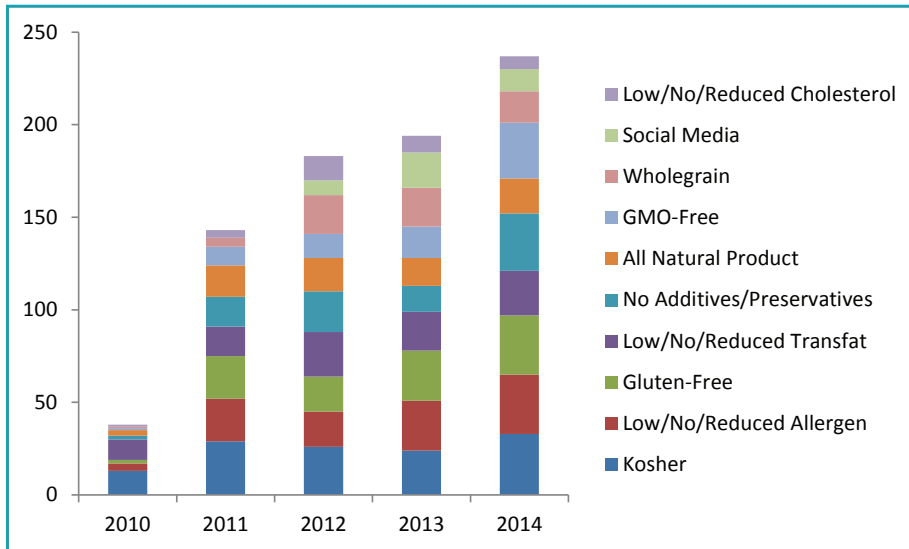
THAILAND: WONDERPUFF WASAMAYO POPCORN

Said to be made with "care, love and perfection, providing pleasure for everyone to enjoy every ingredient." Retails in a 110g pack. (June 2014.)

RTE POPCORN IN NORTH AMERICA

TOP CLAIMS

Of the **422** popcorn products launched between January 2010 and August 2014 in North America, **355** of them were non-microwavable. Kosher has been the leading claim, with 125 new products and increasing 11% between 2010 and 2014. Other top claims include Low/No/Reduced Allergen, Gluten-Free, Low/No/Reduced Trans-fat, No Additives/Preservatives, Wholegrain, All Natural Product and GMO-Free.



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FLAVORFUL MOVIE TIME SNACK

From January 2010 to August 2014, Caramel has been the leader of the top 10 flavor list with **245** new products launched. Salt/Salted comes in second with a total of 96 new products launched and Cheddar Cheese follows with 83 products.

The majority of RTE popcorn products have been flavored with classics like butter, caramel and cheese but we are starting to spot some new and interesting flavors combinations:

- CINNAMON SUGAR
- BUFFALO CHEESE
- SOUR CREAM & ONION
- CHOCOLATE, SEA SALT & Caramel
- BLUE CHEESE
- CHIPOTLE Caramel

TOP 10 READY-TO-EAT POPCORN FLAVORS

JAN. 2010 - AUG. 2014

Caramel
Salt/Salted
Cheddar Cheese
Butter
Chocolate
Cheese
Sea Salt
Toffee
Chili/Chili Pepper
Almond

RTE POPCORN NEW PRODUCTS OF NOTE



479° TOASTED COCONUT CARAMEL ARTISAN POPCORN

Features air popped corn containing 110 calories and no trans fat per 1 cup serving. Is gluten-free, wholegrain, all natural, non-GMO and is kosher certified. Was launched in August 2014. Additional flavor includes Toasted Sesame + Seaweed.



GARY POPPINS CARAMEL & CHEDDAR POPCORN

This premium popcorn is made in small batches and features creamy cheddar cheese and made-from-scratch buttery caramel. Was launched in August 2014. Other flavors include Cheddar & Aged White Cheddar and Cheddar Bacon.



G.H. CRETORS ORGANIC EXTRA VIRGIN OLIVE OIL POPCORN

Made from purely organic ingredients, contains no artificial colors or flavors, is gluten and GMO free and is skinny in calories. Was launched in June 2014. This popcorn was on display at the 2014 Sweets & Snacks Expo in Chicago.

MASALA POP CHAI POPCORN WITH ASSAM TEA

Blended with a fusion of Assam tea, cinnamon, cardamom, ginger, nutmeg, cloves. Exotic and low in calories, it is gluten-free, vegan, all natural and melts in the mouth. Was launched in March 2014.



SEXYPOP BLACK PEPPER FLAVORED POPCORN

Made with the finest air popped popcorn. Contains antioxidants and only 35 calories per cup. GMO and gluten-free, and kosher certified. This product was launched in August 2014. Other flavors include French Butter, Lightly Salted, Bangin' Cheddar, Bodacious Banana.



FONA CAN HELP!

Let our market insight and research experts translate these trends into product category ideas for your brand. They can help you with concept and flavor pipeline development, ideation, consumer studies and white space analysis to pinpoint opportunities in the market.

FONA flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. We understand how to mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution. From concept to manufacturing, we're here every step of the way. Contact our Sales Service Department at 630.578.8600 to request a flavor sample or visit www.fona.com.

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Sources:

1. Mintel GNPD
2. Mintel Market Insights

