

# Snacking

## The Snacking Society



When it comes to snacking, consumers want **fast, portable, value-priced, healthy, delicious and shareable snacks**. Typically eaten at a time other than traditional mealtime, snacks can be either a single food group (think a piece of fruit or chunk of cheese) or be a portion of a meal category (like half a sandwich). Bottom line? Consumers snacking habits completely reflect the status of U.S. consumers' lifestyles today.

## What's In a Snack

### Snack and Energy Bars

Stroll the grocery aisle and it's easy to see that snack bars have made a big image change. Yes, the expected oatmeal-based granola bar is still there, but joining it is the protein-rich meal replacement bar or the paleo bar with unique proteins. Close by is the salty/sweet dessert bar and bars accessorized with vegetable ingredients. The options are wide and varied and consumers should be able to find flavors that entice their tastes and ingredients and support their health goals.

### Salty Snacks

Whether in the form of nuts, popped chips, traditional potato chips, popcorn or crackers, salty snacks are preferred by most consumers as the perfect partners to dips and cheeses or on their own. The category is worth \$21.8 billion in sales.

### Sweet Snacks

Americans love their cookies for either a snack or a dessert, but whole grains are becoming more and more desired. Consumer interest in healthier cookies is high with **23%** desiring all natural cookies and **20%** interested in whole grain cookies. New product introductions fall short of this demand as only 17% of cookie introductions had all natural claims and 10% claimed whole grain ingredients.



## Snacking Tastes So Good

(Includes all snacks: nuts, potato chips, popcorn, snack bars, snack mixes, rice snacks, fruit-based snacks, bean-based snacks)

### Top Snacking Flavors

Cheddar Cheese	Fruit
Sea Salt	Butter
Chocolate	Berry
Cheese	Roasted & Salt
Strawberry	Nacho Cheese
Barbecue	Sour Cream & Onion
Peanut Butter	Cinnamon

### Unique Flavors

- Bacon and Whiskey
- Barbecue and Seaweed
- Bison Bacon and Cranberry
- Carrot, Chili Pepper and Lime
- Chocolate, Blueberry and Cranberry
- Dark Chocolate, Coffee and Cayenne

# Something to Snack On

## Labeling

Gluten-free and clean labels are winning with consumers. It's not enough to be low-sodium or natural anymore. Consumers want to recognize and understand the ingredients contained in the foods they purchase—even their snack foods.

## Protein Added to Snacking

**63%** of consumers look for protein content when purchasing packaged food and drink, while **57%** are trying to get as much protein as possible into their diet. With a third of high protein products coming from the snacking category mostly made up of snack bars, there is definitely opportunity for protein in the salty snack arena. Also, high protein snack bars with more than 15g of protein are limited in mainstream brands, which presents opportunity.



## Consumers Determine the Category of Snack

Just because it's labeled "snack" doesn't mean that's how consumers consume it. Portion size, portability and packaging are all factors that dictate meals or snacks in consumers' on-the-go lifestyles. Look for the snacking lines to blur as manufacturers position products based on lifestyles of their customers.

## Ethnic Flavors

Only **20%** of salty snackers will experiment with unique flavors, but consumers growing interest in ethnic cuisines and restaurants says otherwise. The winner of the 2014 Frito-Lay Do Us a Flavor competition created a wasabi ginger potato chip flavor, signifying a shift in snacking flavors. Especially seeing a surge in ethnic flavors is the popcorn segment, as smaller boutique manufacturers are taking advantage of consumers' obsession with sriracha and bold flavors. This is a segment with popping sales, as ready to eat popcorn sales surged to more than \$750 million in 2014, an increase of **60%** since 2012.

## Snacking 411

- The snacking industry represents over \$124 billion in retail sales in North America.
- In the U.S., salty snack sales have increased **28%** since 2008 and are expected to grow another **31%** by 2018.
- The number of consumers who would define themselves as "healthy snackers" has grown from 2 million to 41 million since 2004.
- Snacking is an all day event for most consumers, regardless of the time of day, but **60%** of consumers are snacking after noon.
- On-the-go snacking is a growing trend up **5%** since 2009 with **45%** of consumers looking for convenient, easy-to-pack snacks.
- **67%** of consumers snack because they are satisfying an emotional hunger, while **61%** eat to quell physical hunger.