

20 CATEGORY 17 INSIGHT



Bars: Big Impact in a Small Package

With 25% growth expected in the next five years, it's no surprise that snack bars are a huge area of focus for product developers. The reasons for the popularity track perfectly with consumers' overall needs and interests: convenience, portability and nutrition-focused. The variety of forms and tastes truly spans the spectrum. Meanwhile developers are innovating and expanding their toolbox daily. Let's take a global look at bars, from new forms like bites to opportunities within functional ingredients, reduced sugar, savory spins and plant proteins.

Global Launches

Global snack bar introductions rose 5% in one year alone (2015-2016).

Global bar introductions rose 5% from 2015 to 2016. The category is expected to reach \$8.2 billion by 2021, equaling a five-year-gain of 23%. In the US, sales increased 24% from 2011-2016 to \$6.7 billion. Across the Atlantic, we see France with a 325% increase in launches over this time period, Italy with 496% and the Czech Republic tallying a huge 1,640% increase.



Other European markets such as the UK, Turkey, Sweden, Norway, as well as Russia, aren't currently on the bar bandwagon. This lack of saturation could mean huge opportunity, since consumers worldwide demand healthier, more nutrient-dense, portable snack foods.

Snack bars are expected to see 23% growth over the next 5 years.

Flavors

While highlighting health attributes is important for bar brands, it always come back to taste. While good-for-you ingredients Chia, Quinoa, Flax, Spirulina and Hemp are increasing, beloved tastes like Chocolate, Nuts and fruits like Coconut and Apple reign supreme.

An interesting cross-category influence to note is the rise of coffee culture bringing cafe inspiration to bars. Flavors like Coffee, Mocha, Espresso and Cappuccino are all appearing more often in the market. We see classic pairings with flavors such as Chocolate, Vanilla, Brownie, Almond, Cinnamon, Walnut, and Cacao, as well as more adventurous combinations with Cake, Raspberry, Cashew, Stout, Sour Cherry and Chia.

Top 15 Flavors

- Chocolate
- Almond
- Nut
- Cranberry
- Coconut
- Dark Chocolate
- Apple
- Peanut
- Strawberry
- Cocoa
- Fruit
- Peanut Butter
- Yogurt
- Banana
- Honey

Top 15 Growing Flavors

- Chia
- Quinoa
- Cake
- Butter
- Fruit
- Apple Pie
- Cookie Dough
- Pretzel
- Hemp
- Coffee/Espresso
- Spirulina
- Flax
- Pumpkin Seed
- Sweet & Salty
- Coffee/Cappuccino



LIEBHART'S ORGANIC CAPPUCCINO FLAVORED FRUIT BAR

is free from egg, comprises a honey and almond bar formulated with whole milk, chocolate and coffee.

Germany Oct. 2017



PALEO ESPRESSO PROTEIN BAR

has been reformulated with probiotics and prebiotics. This snack bar contains egg white protein and has 100mg caffeine per bar.

US March 2017

Products of Note



HARVEST BOX SNACK PACKS GOGO GOJI HEALTH BOMBS

are all-natural, cold-pressed, bite-sized balls comprising goji, chia, cashew and almond. Positioned as guilt-free, the snack contains superfoods, is a source of fiber and is free from added sugar, artificial coloring, flavoring and preservatives.

New Zealand Oct. 2017



ROO'BAR PROTEIN BAR WITH CHIA AND SPIRULINA

with 22% protein power contains vegan protein sources such as rice protein and chia.

Russia Sept. 2017



NAKD. LEMON DRIZZLE RAW FRUIT & NUT BARS

are made with 100% natural ingredients. These cold-pressed, never baked bars are made with fruit and nuts smushed together and are suitable for vegans.

Portugal Aug. 2017



NU+CAO ESPRESSO RAW CACAO & HEMP SEED BAR

provides plant-based protein. The manufacturer claims that ingredients have been combined in a way that the body can most effectively absorb the nutrients.

Austria Oct. 2017



GATHR CROBAR COFFEE, VANILLA & CRICKET FLOUR BAR

is described as an ethical source of protein. Roasted into versatile flour, crickets take less resources to farm, produce less harmful by-products and are higher in protein and micro-nutrients than beef.

UK Sept. 2016

Protein Candy Bars

Snickers, Mars, Milky Way, Bounty

Blogs and Pinterest boards have long been home to homemade protein candy bars, recipes created to take a favorite treat and give it a healthy twist. For example, interested snackers could make Protein Pow's Snickers-Inspired Protein Bars featuring ground almonds, coconut flour, almond milk and Medjool dates. Or, use peanut butter, honey and coconut oil to make Healthy Homemade Snickers Protein Bars, positioned as "quick, easy and portable snacks" on The Big Man's World blog.

Now, if you live in the UK or shop on Amazon, you can pick up the real deal: Protein Snickers, Milky Way, Mars and Bounty candy bars.

Reports from consumers who have tried one of these new creations is that they taste like the original candy bars, just with 18-19g of protein per bar as an added bonus. The bars clock in at fewer than 200 calories and have 9-13g of sugar. These nutritional stats put the bars on level footing with other protein bars on the market (and definitely more healthy than the original candy bars!).

Quest

Mars bars have headed into protein bar land and now Quest is heading into candy bar land. Known for their indulgent flavors, Quest bars have now gone all in with the launch of Hero, a "high protein, multi-textured candy bar." The bars contains 15 to 17 grams of protein, 10 grams of fiber and under 200 calories.

A point of interest with this bar is it is said to be the first mainstream food product in the US containing the "rare sugar" allulose. According to Mintel, allulose is emerging as a "next generation" sweetener that is essentially calorie-free and provides the same bulking, browning, texture and mouthfeel properties as white sugar.



MARS & SNICKERS PROTEIN CANDY BARS have 18-19 g of protein per bar and with less than 200 calories and have 9-13 g of sugar, consumers can feel better about their snacking indulgence.



QUEST HERO PROTEIN BAR is described as a "high protein, multi-textured candy bar" with 15-17 g of protein and under 200 calories per bar.

Flavor Trend: A Move Toward Savory Flavors

The majority of snack bars have sweet flavors, but in the US, where 84% of consumers claim to limit the amount of sugar in their diets, nearly a third of consumers show interest in snack bar innovation with savory flavors. It's not just the United States where savory flavors are gaining favor. Globally, savory flavors and descriptors such as spicy and salty are on the rise. Ethnic flavors also continue to gain traction as society becomes more diverse and world travel more common. These trends open doors for product developers to expand their toolkits of savory flavors, including formulating with more vegetables, meat, herbs and global spices, as well as offering bold flavors, such as smoky and sour.

Founded by a trio of avid travelers, Journey Bars incorporate all of these flavor trends into their products. They're made from almonds, whole grains like quinoa, amaranth, oats, and flaxseed and real herbs and spices inspired by global cuisine. Designed to be a grab-and-go snack that "tastes like a meal, not candy," they have 7g of sugar and a soft, chewy texture. Flavors include Thai-inspired Coconut Curry, Italian-inspired Pizza Marinara, Japanese-inspired Sesame Ginger, French-inspired Rosemary, and Sea Salt.



MEDITERRA SAVORY BAR WITH KALE, POMEGRANATE, QUINOA & ALMONDS

boasts a gourmet blend of pea crisps, quinoa, almonds, and a touch of extra virgin olive oil. Other flavors include Kale, Apple, Quinoa & Almonds; Kale & Pumpkin Seeds; and Black Olives & Walnuts. [US June 2017](#)



VÉA WORLD RECIPES PERUVIAN SWEET POTATO MINI CRUNCH BARS

have layers of Peruvian-inspired flavor with shredded sweet potato and cayenne pepper all combined with real ingredients like black chia seeds. [US Sept. 2017](#)



BRICKS MEALS & SNACKS TURKEY SWEET POTATO CRANBERRY AND PUMPKIN SEED BAR

is made with turkey. Also available in Grass Fed Beef Uncured Bacon Cranberry and Sunflower Seeds flavor. [US Jan. 2016](#)

Plant Power

From Beyonce's 22 Days Nutrition vegan product and meal line to Tom Brady's collaboration with Purple Carrot, plant-rich diets (or at least incorporating more vegetables into meals) continue to gain popularity with big names bringing the benefits of plant-based diets to a wider, mainstream audience.

And as consumers buy in to this way of eating, whether for health, environmental, ethical or "hey, it worked for Tom Brady" reasons, bar manufacturers have responded by developing products featuring ingredients such as cashews, quinoa, dates, and rice, pea and hemp protein. Soy is also a popular vegan protein source, but it is often seen as problematic because it is a common allergen and much is genetically modified.

NO BEATING AROUND THE BUSH, SO TO SPEAK

When it comes to plant positioning, get right to it. Research shows terms such as "plant-powered" resonate with US consumers. Jodie Monotto of Mintel reports that "vegan and plant-based diets now hold such appeal, that these words are now being elevated beyond claims, and incorporated into brand names." In fact, 6% of all snack bars launched in this market over the 12 months to May 2017 made direct references to the presence of plants in the product. Examples include PowerBar Plant Protein and 22 Days Plant Power Protein Bar.

"If a Houston-born foodie like me can do it, you can, too."

- Beyonce, sharing encouragement for joining the plant-powered lifestyle

31% of US consumers include at least one meat-free meal in their week, while 30% are trying to eat a 'more plant-based diet'.

Mintel, Vegetables – US – May 2016



New York Knicks player Kristaps Porzingis is the new brand ambassador for vegan snack bar Zing.

Flavors

The top flavor components for plant-powered bars are similar to the category as a whole with chocolate, almond, coconut, nut and fruit leading the way. The fastest growing flavors from Q3 2016 to Q3 2017 include:

- **Beet (+200.00%)**
- **Spirulina (+200.00%)**
- **Orange (+166.67%)**
- **Peanut Butter (+100.00%)**
- **Brownie (+100.00%)**
- **Red Berry (+100.00%)**



Top Growing Claims

Q3 2016 vs. Q3 2017

- **Premium (+300%)**
- **Low/No/Reduced Carb (+100%)**
- **Limited Edition (+100%)**
- **Ethical-Human (+87.5%)**
- **Digestive (Functional) (+50%)**



VEG BAR CHOCOLATE PEA AND SOY PROTEIN BAR

is vegan friendly. This 100% vegetable product contains max pea protein, zero lactose, 12g protein, and nature identical synthetic flavoring. [Brazil April 2017](#)



ALOHA CHOCOLATE FUDGE BROWNIE PLANT-BASED ORGANIC PROTEIN BARS

are vegan certified and are made with whole food ingredients, including brown rice and pumpkin seeds. [US August 2017](#)



MAX SPORT NUTRITION BARS

are made with legumes, seeds, vegetables and olive oil. They are said to be a unique salty snack and are available in four flavors: Grill, Pizza, Sesame, Veggie Mix. [Slovakia](#)

Functional Ingredients

In their 2018 trends outlook, Mintel advises brands to promote self-care as a permissible and essential. An attitude of “Take control of your health, even if you can’t control life.” Food is, of course, a major player in self-care and wellness, and as consumers continue to focus on feeling better and leading happier lives, they want convenient food products to help in this mission.

In response, global launches of bars with a Functional claim rose 82% between 2011 and 2016. The majority of these products are from the US (22%) with UK, Australia, Mexico and Italy rounding out the top 5. Italy experienced incredible growth with launches climbing from only 2 in 2011 to 57 last year. And France appears to be poised for similar growth: the country currently only accounts for 3% of global bar launches with Functional claims, and 65% of French consumers say they’d like to see more bars with added health benefits.

Looking at specific functional claims, Brain & Nervous System more than doubled from 2011-2016, Other functional claims jumped 278% (metabolism, anti-inflammatory, etc.) and Cardiovascular rose 142% from 2011-2015. The top growing claim in functional bars is Low/No/Reduced Lactose with +400% growth.

WHAT DRIVES US CONSUMERS TO PURSUE A HEALTHIER LIFESTYLE?

- 69% feel better
- 57% be happier
- 57% live longer
- 53% look better

Source: Mintel January 2017

ADAPTING TO CONSUMER VIEWS

Two bar brands we spotted changing their approaches to product functionality: Atkins and Zing. Atkins, known for a weight loss positioning, launched high protein Lift sports nutrition bars to try to appeal to younger fitness enthusiasts and protein-seekers who have been uninterested in their low carb weight loss positioning.

Zing vegan nutrition bars, founded by registered dietitians in 2007, rebranded to position themselves as a product providing customers “vitality” rather than “energy.” CEO David Ingalls told Food Navigator that energy has “become synonymous with sugar and caffeine, whereas vitality comes from great taste and sustained energy.”

Top Growing Flavors

- White Chocolate +200.00%
- Seed +400.00%
- Sea Salt +100.00%
- Date +100.00%
- Carob +100.00%
- Red Berry +100.00%



Products of Note



APTONIA ULTRA APPLE FLAVORED FRUIT BARS

are said to contain maltodextrin and are easy to chew. The product supports cardiac function, reduces fatigue and contributes to normal energy metabolism

France Oct. 2017



BIOTECH USA GO PROTEIN CHOCOLATE-MARZIPAN FLAVOURED PROTEIN BAR WITH BCAAs, L-GLUTAMINE AND VITAMINS

contains protein, and vitamin B6 that contributes to normal protein glycogen metabolism and the reduction of tiredness and fatigue.

Switzerland Sept. 2017



ZONE PERFECT REVITALIZE SALTED CARAMEL LATTE BARS

are designed to improve mental focus. These bars are made with green tea extract, which contains caffeine for a burst of uplifting energy; choline to support brain health; and 11g of protein.

US Sept. 2017



TWO MOMS IN THE RAW SOUL SPROUT CACAO NIB CRUNCH GRANOLA BARS

feature an Accelerated Nutrition, which is driven by the body's positive responses to raw and sprouted ingredients that provide wellness and high energy.

US Sept. 2017



WIPALA HEALTHY SNACKS BANANA FLAVORED ANDEAN QUINOA & ANDEAN LUPIN BAR

is 100% vegan, raw, free from gluten and contains 1g fat per bar.

US August 2017



AWAKE ENERGY GRANOLA DARK CHOCOLATE PEANUT BUTTER CHEWY BARS

are made with caffeine and B vitamins. Each snack bar is equal to half a cup of coffee to help fuel the body.

US March 2017

Small Size, Huge Opportunity

Snack bars (including the array of ever-expanding formats) answer a clear need for consumers: deliver convenience, pack in health and nutrition, and provide a myriad of tastes and ingredients. Bars are growing and show no sign of slowing, with an estimated 25% increase in the next five years. Dream big when it comes to this space. Whether bars, bites or balls, protein/energy snacks, consumers are engaged. Help them find the functional benefits they need and make it easy to explore through savory flavors, ethnic spices, vegetable and meat ingredients and plant proteins. And when these elements come together in a well-crafted ingredient list, consider it an asset, and don't hide it away in the small print.

FONA CAN HELP!

Let FONA's 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.

Our 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.

CONTACT OUR SALES SERVICE DEPARTMENT

at 630.578.8600 to request a flavor sample or visit www.fona.com.

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