



# MEAT SNACKS: ACCELERATED OPPORTUNITY

## 2018 • TREND INSIGHT REPORT

It's a space following closely with the biggest trends in food and beverage (including premiumization, clean label & protein-rich). The meat snacks business is growing at an epic pace, with new innovation around everything from new flavors to unique protein and ingredients. As the fastest-growing snack food, it's garnering a wide base of consumers looking for high protein foods or easy snacks. As it moves well beyond the classic convenience store jerky, let's look at the flavors, claims and formats driving meat snack elevation and popularity.

# CATCHING UP TO CHIPS

Global meat snack sales could hit \$9.47 billion by 2021, according Technavio research, and Nielsen says the US market is now a \$2.8 billion category with predictions for 4.2% annualized growth through 2022. Food Navigator reports that among salty snacks, meat snacks are second after potato chips in terms of sales and are the fastest-growing segment of the snack food industry.

10

The number of times the average U.S. consumer currently enjoys meat snacks each year, up significantly from 8 in 2012, says Darren Seifer of NPD Group. Natural, artisanal and premium products are seen as the drivers of this growth

\$25.81

Average annual household spend on meat snacks according to *Food Navigator*

89%

Of Millennials consumed one or more better-for-you snacks in the past week.  
-*The Center for Generational Kinetics*

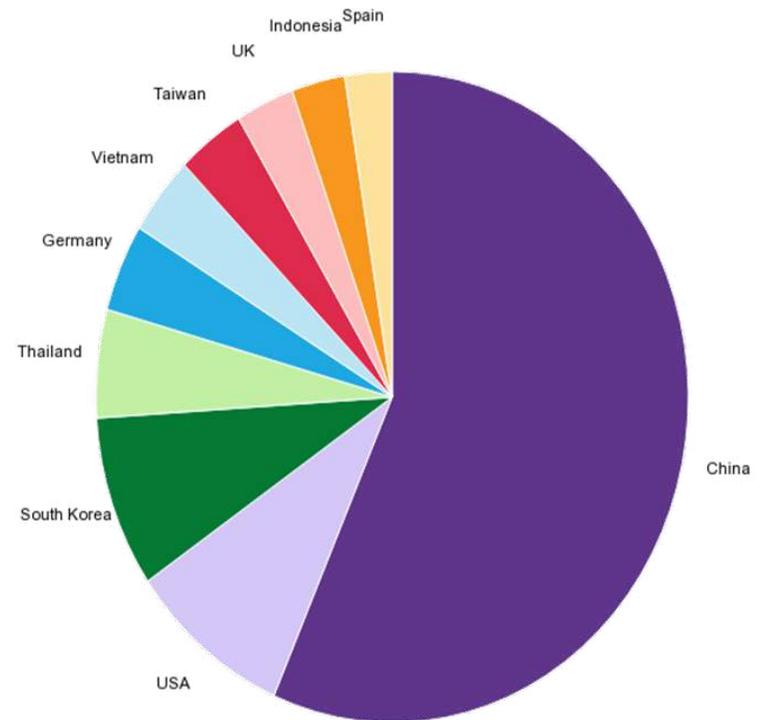
## A GLOBAL LOOK

Percentage of consumers who ate meat snacks in 2017

34% US  
22% Germany  
20% Spain  
12% UK

## TOP COUNTRIES FOR MEAT SNACK LAUNCHES, 2013-2017

China  
US  
South Korea  
Thailand (+127%)  
Germany (+127%)  
Vietnam  
Taiwan  
UK +117%  
Indonesia +443%



# HEALTH: CLEAN LABEL & CLAIMS

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## HIGH PROTEIN

- 30% of global meat snack introductions in 2017 were positioned on a health platform of some kind.
- In Europe, high protein claims on meat snacks more than doubled between 2014 (11%) and 2017 (25%).
- 42% of North American meat snack launches in 2017 carried the high protein claim.

“Meat snacks have benefited from the increasing prevalence of Americans trying to eat more protein as part of a healthful diet,” Jorday Rost, VP of consumer insights at Nielsen, told Food Navigator. And meat snacks are seen by some consumers as a more natural alternative to powders and bars, who could be the target of Country Archer’s tagline: “your new favorite protein bar.”

Nielsen’s Rost also pointed out that meat snacks have particularly resonated with consumers following meal plans like paleo that focus on eating protein-rich, low sugar and carb diets.

Brands with names such as Caveman Foods are pointed in their positioning. We also see callouts for specific diets in meat snack advertising, such as the packaging for The New Primal and Chomps which carry logos denoting compliance with paleo and Whole30 meal plans.



**We changed our vision from being the dominant leader in jerky to really being the dominant leader in protein snacking.**

*- Jack Link's chief marketing officer  
Tom Dixon*



# FREE FROM

About 26% of 18-34-year-old US consumers like the notion of preservative-free products, a category claim that has seen huge growth over the last four years. In fact, several claims related to clean labels and products have seen large increases between 2013-2017:

- Hormone Free +525%
- Low/No/Reduced Allergen +433%
- Gluten Free +428%
- All Natural +273%
- No Additives/Preservatives +142%

ChikPro's chicken-protein-based Meat Snx target these consumers looking for clean, "free from" labels and those following high protein diets. The company says ChikPro's gluten-free, dairy-free and soy-free ingredient list makes it perfect for people following specialty diets such as ketogenic and paleo. The snacks are made with chicken and pea protein and come in 5 flavors: Ranch, Cheese Pizza, Sriracha, Sweet BBQ, and Cinnamon Bun.



## TOP 10 CLAIMS, MEAT SNACKS, NORTH AMERICA JAN. 2013-MAY 2018

Low/No/Reduced Allergen  
Gluten Free  
No Additives/Preservatives  
High/Added Protein  
Low/No/Reduced Fat  
All Natural Product  
Premium  
Hormone Free  
Social Media  
Convenient Packaging

## TOP 10 CLAIMS, MEAT SNACKS, GLOBAL, JAN. 2013-MAY 2018

No Additives/Preservatives  
Low/No/Reduced Allergen  
Ease of Use  
High/Added Protein  
Gluten Free  
Social Media  
On-the-go  
Halal  
Low/No/Reduced Fat  
Premium

**32% of 18-34 year-old U.S. consumers show interest in grass-fed meat snacks.** -Mintel

# WHITESPACE IN BRAZIL

44%

of Brazilians are interested in fortified snacks, like those with high protein.

1%

of Brazilian snack launches were meat snacks from October 2014-October 2017.

Mintel dubbed Brazilians “enthusiastic meat consumers” If you’ve ever visited a Brazilian steakhouse that’s not a surprise. However, meat snacks are barely on the radar in the country. More than 40% of Brazilians are interested in fortified snacks, like those with high protein, (especially younger consumers) and 24% eat meat snacks (34% of 16-24 year-olds). But meat snacks only account for 1% of snacks launched in Brazil from October 2014-October 2017. This shows a great deal of whitespace for product developers to create snacks targeting Brazilian consumers who are enthusiastic when it comes to meat!



Sadia Salamitos Pepperoni Flavored Salami Snacks are made from 100% salami, contains 11g protein, are gluten-free, and can be consumed at anytime and anywhere.

## CONSUMER CLOSEUP: WHO IS EATING MEAT SNACKS?

Meat snacks have typically been marketed to men and while men are top consumers, more than 20% of women report eating meat snacks as well. As developers are able check more and more boxes for consumers as a whole (snacking, high protein, convenience, humane, etc.), companies are successfully broadening the appeal to women.

For example, Country Archer’s website directly addresses gender by saying, “You don’t have to be a dude” to enjoy their Sweet Pork BBQ Bars. Link Snacks launched Lorissa’s Kitchen meat snacks, targeting “active, upscale women looking for a healthy snack with varieties such as Ginger Teriyaki and Korean Barbecue Beef.” In Poland, ZM Henryk Kania launched a meat stick specifically for women, and VP Dominika Raba says that the market for meat snacks targeting women is a “promising market segment.”

# JERKY JR.

Teens are also supporting the rise of meat snack popularity. In 2013, only 6% of meat snacks were purchased for teens, but in 2017 this number jumped to 30%.

This sky-rocketing interest from younger consumers opens whitespace for product developers to create meat snacks targeted specifically to kids, such as New Primal's Snack Mates. Described as "the first paleo-friendly meat sticks made just for kids," the products are said to have a "mild, non-spicy flavor, perfect for the young palate." The products focus on the protein content: the beef variety has 6g of protein per serving, while the turkey has 7g of protein. Such products also target parents who are looking for healthy snacks for their kids.



# PREMIUMIZATION

Meat snacks have, as *Food Navigator* described it, graduated from their days as a gas station snack. Now, elevated ingredients, clean labels and a raft of flavor and form innovations have targeted health and fitness enthusiasts, parents looking for low sugar, high protein snacks for their kids, and busy consumers needing sustaining, convenient, on-the-go sustenance at work and play.

Companies share origin stories, market their meat snacks in modern, eye-catching packaging and emphasize ethical/humane farming and sourcing. Words like luxurious, gourmet, clean, natural, premium and artisan are common, and Krave Jerky even references their customers' "discerning palates." Also notable are the protein sources themselves. Today's snacks feature proteins such as grass-fed beef and wild caught Coho salmon.

28% of consumers find grass-fed meat snacks appealing

- Mintel/Convenience Store Decisions

# INGREDIENTS & FLAVOR

41%

of consumers would like to see more meat snacks made from premium meat cuts. - *Mintel/Convenience Store*

1/3

of consumers avoid at least one type of protein source. - *Mintel*

The new wave of meat snacks features adventurous flavors with global inspiration and premium ingredients. Meat snack used to mean basic beef jerky, but today protein sources include premium options such as grass-fed beef, pasture-raised venison, cage-free turkey and chicken, and Coho salmon said to be caught wild by Alaskan native peoples. Add to this the rise of plant-based protein snacks, and there is now something for everyone looking for a portable, high protein snack.

## TOP 10 FLAVORS, MEAT SNACKS, NORTH AMERICA, JAN. 2013-MAY 2018

Beef  
Pork  
Smoke  
Teriyaki  
Chicken  
Turkey  
BBQ  
Bacon  
Pepper  
Hickory Smoke

## TOP 10 FLAVORS, MEAT SNACKS, GLOBAL, JAN. 2013-MAY 2018

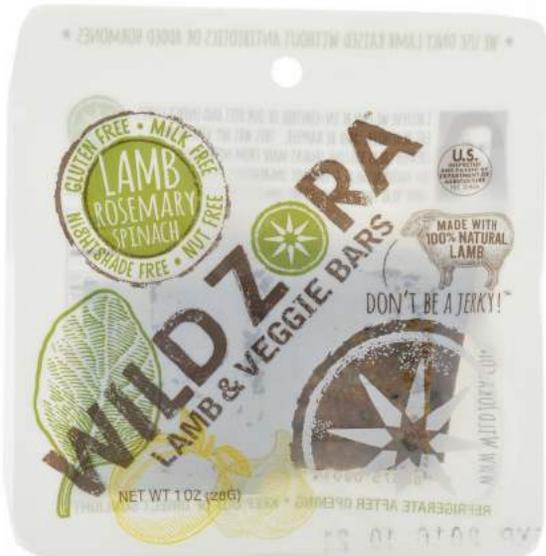
Beef  
Spice  
Fish  
Pork  
Chicken  
Squid  
Duck  
Hot  
BBQ  
Five Spices



# HERBS & ETHNIC FLAVORS

As in other food categories, herbs and spices with an international flair are appearing in meat snacks. We see rosemary, basil, curry, chipotle, kimchi and adobo appearing in meat snacks. Wild Zora Bars, which feature meat, veggies and spices are a perfect example with flavors like Mediterranean Lamb with Spinach, Rosemary and Turmeric; Curry Turkey with Dates, Cardamom and Spinach; and Apple Pork with Kale, Parsley, Sage, Rosemary and Thyme.

The Mediterranean Lamb variety was given a premium review by Molly Jean Bennett of Paste Magazine when she said it was “supremely herby and not too salty, like a tiny lamb burger you can carry in your purse.” This is not your grandfather’s beef jerky.



## STAND-OUTS

Epic, the company that was on the forefront of premium meat snack innovation, makes bars from meats such as venison, lamb, wild boar and even has Alaskan Salmon Maple Dill Bites. Country Archer’s Cayenne Beef with Bacon Bar is marketed as being made with “real ingredients” such as grass-fed beef, antibiotic-free pork and collagen peptides.

True Jerky’s product line offers a variety of flavors: Honey Bourbon Brisket, Thai Chili Mango Beef, Blackberry Merlot Beef, and Citrus Chardonnay Turkey. Their trail mix, marketed as “protein, taste & texture all in one bag” uses ingredients like roasted edamame, salted cashews, pumpkin seeds and golden raisins.

## CONSUMERS SPEAK: THE MOST APPEALING TYPES OF MEAT

80% Beef	27% Venison
49% Chicken	26% Salmon
45% Turkey	22% Lamb
45% Pork	17% Boar
34% Bison	11% Other Fish

# PLANT-BASED MEAT SNACKS

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39%

of Americans and 43% of Canadians are actively trying to incorporate more plant-based foods into their diets.

23%

of global consumers want more plant-based proteins on the shelves. - Nielsen

We've looked at how the source of meat snacks' protein has gone premium -- but some products in the space have also gone meatless, with ingredients such as beans, nuts, chia, flax, soy, seitan, mushrooms and kelp.

Soy, seitan and mushrooms are used to mimic the texture of meat snacks, and companies will often use meat flavorings and classic meat snack flavors like beef, teriyaki, barbecue and mesquite in these products, as well.

As Mintel's Director of Insight Marcia Mogelonsky points out, copying the taste and texture of meat "may satisfy consumers who are eschewing meat for medical or health reasons, (but) not for ethical or moral principles." In other words, product developers should keep in mind there are consumers who want to enjoy high protein snacks but may not feel like they are "missing out on" meat.

The plant-based meat market will be worth \$5 billion by 2020 according to *Fast Company*.



# KELP & COCONUT

Sea greens are expected to account for 15% or \$750 million of the predicted \$5 billion plant-based meat market by 2020.

AKUA Kelp Jerky, made with 100% ocean-farmed lattissima kelp contains 8 g protein per serving) with the addition of pea protein and mushroom stems (which add umami flavor, as well). Available in Sea Salt & Sesame with Nori, Thai with Turmeric and Coconut, and Rosemary BBQ with Maple.

Brands promote coconut jerky's protein content and texture, which is similar to meat jerky. Coconut lends itself to both savory and sweet flavor profiles like Cocoburg's Ginger Teriyaki and Chili Lime varieties and Mighty Bee's Chocolate Hazelnut.

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Lattissima kelp is called the bamboo of the sea because every year it actually yields exponential returns for the farmers. The nutrients that the kelp leaves in the water means that it grows faster and bigger the following year.

-AKUA Co-founder Courtney Boyd Myers

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# NEW FORMATS PROVIDING VARIETY IN TEXTURE & FLAVOR

As the meat snack trend has grown, innovative formats have appeared on the market providing consumers with a variety of texture and flavor options. Beyond jerky, products are being dubbed cuts, strips, bars, pieces, chips, sticks and bites.

## TRAIL MIX

Trail mixes, introduced by companies like Oberto, Epic, Dick Stevens, and Ostrim have provided a format to introduce more textures and flavors to consumers in a single snack. True Jerky Trail Mix, for example, pairs meat snacks with ingredients such as roasted edamame beans, salted cashews, sweet cranberries, golden raisins, and sunflower and pumpkin seeds. The mix is marketed as “protein, taste and texture all in one bag” and has 12-20 grams of protein per bag.

30%

of consumers aged 18-34 are interested in meat snack trail mixes.

27%

of consumers aged 18-34 are interested in meat snack bars. -*Convenience Store Decisions*

## CHIPS

Thin meat chips and crisps are a new format that deliver the protein consumers are looking for with the crunch of a cracker or chip, offering a new texture and a healthier snack alternative to classic potato chips. Wilde Brand chips are made from chicken, cassava root and coconut oil and contain 15 grams of protein. The New Primal Beef Thins are promoted as having “the tempting look of jerky and the satisfying crunch of a chip” and deliver up 13 grams of protein. They are available in Sea Salt or BBQ flavor.



**YEH ROSEMARY & MEYER LEMON TURKEY CHIPS** are made with 100% lean turkey breast, freshly cut rosemary, and meyer lemon for a touch of citrus-y sweetness. For added texture and flavor, California almonds and crushed red pepper are also featured. This US product is available in Umami Bacon flavor. The products were inspired by a wafer-thin street snack made of meat discovered on a trip to Taiwan.



**EPIC BITES TENDER VENISON STEAK** is made with 100% grass-fed, free range venison. Free from soy and gluten and provides 10g protein per serving. US February 2018



**YAPPAH PROTEIN CRISPS** are made with what the company calls “rescued foods:” chicken breast trim and leftovers from vegetable juicing or beer brewing at Molson Coors Brewing Co. Flavors include Chicken Celery Mojo; Chicken Carrot Curry; Chicken IPA White Cheddar; and Chicken Shandy Beer.

# THE TAKEAWAYS

*Ethnic flavors. New proteins. Growing market. Consumer interest. Meat snacks is an area ripe for product development. It's the fastest growing snack category with clear opportunity. A segment following closely with overall consumer trends (premiumization, clean label, health-focus), consider your audience in this space. As specialized diets, protein and convenience remain important to consumers, meat snack developers have room for continued innovation in flavor, form and ingredients.*

## YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your "what's next." Our technical 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. Let's 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 for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at [www.fona.com/contact-fona/](http://www.fona.com/contact-fona/)

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