

A top-down photograph of several granola bars on a light-colored, weathered wooden surface. The bars are made of oats, nuts, and dried fruits like blueberries and green grapes. Some bars are whole, while others are broken into pieces. A white bowl filled with oat flakes is visible in the top left corner, and a blue and white plaid cloth is partially visible in the top center. The background is a soft-focus pattern of granola ingredients.

BARS

2018 CATEGORY REPORT

The sky's the limit for bars, as shown by a stroll through Philadelphia's airport terminal shops. A microcosm of the category: Shelves are filled with bars of all types: high protein, low sugar, vegan, refrigerated, seeds, nuts, meat. Pistachio bars and birthday cake bars. Bars stacked in coolers and circling displays. Bars for energy or for sleep. Whatever your need or diet, terminal C had a bar for you. And like a direct flight to L.A., this category growth isn't slowing down. Reports looking toward 2023 predict a 6.7% CAGR globally, and we continue to see interesting innovations in flavor and form that address consumers' new and existing needs. Let's explore a few of these trends.

TOP DRIVER: HEALTH

Health continues to be the top driver in the category with North American consumer interest in clean labels and plant-based bar options leading to products promoting “whole” and “real” ingredients, as well as vegan formulations. We also see format varieties, such as balls, sticks and bites, providing alternatives for bar-fatigued consumers.

PRODUCTS OF NOTE



**NAKED BLUE MACHINE
FRUIT, NUT & VEGGIE BAR**

Packed with vitamins A, C, E and iron, and made with five fruits and vegetables, this on-the-go product contains 160 calories per bar, is free from preservatives and gluten, and is suitable for vegans.

USA August 2018



**MADE IN NATURE ORGANIC
SUPERSNACKS CHOCO CRUNCH FIGGY POP**

Described as a sublimely satisfying fruit and nut snack that will keep the consumer going strong all day, this kosher certified product contains no GMO or refined sugars, are made with cocoa, cherries, dates, figs, pepita seeds, coconut and cacao nibs.

Canada July 2018



2,318

NORTH AMERICA LEADS THE WAY IN BAR LAUNCHES (Jan. 2014-Aug. 2018)



+1,300%

TOP TRENDING GLOBAL SNACK BAR CLAIM: FUNCTIONAL - BRAIN + NERVOUS SYSTEM (Q2 2017 - Q2 2018)

TOP FIVE CLAIMS

- Low/No/Reduced Allergen
- Gluten Free
- Kosher
- GMO Free
- Ethical-Environmentally Friendly Package



CLIF BAR ORGANIC TART CHERRY BERRY FRUIT SMOOTHIE FILLED ENERGY BAR

Featuring a blend of cashew butter, dried fruit and juice concentrates, this retails in a recyclable pack made from 100% recycled content with a maximum of 65% pre-consumer content and a minimum of 35% post-consumer fiber content.

USA July 2018

TOP 5 FLAVORS INCLUDING BLENDS

Chocolate, Chocolate & Peanut Butter, Peanut Butter, Blueberry, Berry



PROBAR LIVE PEANUT BUTTER LIVE PROBIOTIC NUTRITION BAR

Contains 10g plant-based protein and live probiotics, and is free from no added sugar, gluten and GMO.

USA July 2018

COMPOSTABLE WRAPPER



Shanvalley Innovative Food Company of County Mayo, Ireland, launched Karma Free snack bars in compostable packaging made of bio-based materials that decomposes within 180 days.



16

NEW SNACK BARS FEATURING HEMP AS A FLAVOR COMPONENT LAUNCHED IN NORTH AMERICA SINCE 2014



185%

INCREASE IN VEGAN PRODUCTS LAUNCHED IN UK BETWEEN 2012 AND 2016.

PLANT POWER: HEMP



From milks to snacks to menu entrees, plant-based ingredients are on the rise, and snack bars are no exception. As consumers continue to look for whole food ingredients, health propositions, and vegetarian/vegan options (20% of launches carry the vegan claim, Jan. 2014-Aug. 2018), we see use of ingredients such as flax, chia, pumpkin and hemp seeds increasing.

Hemp seeds are promoted as providing protein, fiber and amino acids and are appearing in more mainstream products like Trader Joe's Organic Hemp Seed Bars. Launched this August, they're made with organic almonds, cashews, crisped brown rice,

gluten-free oats, wild blueberries, currants and hulled hemp seeds that give the bars a

"delicately earthy flavor." While not vegetarian/vegan,

Crickstart protein bars (Canada, August 2018) are an

interesting find as they pair hemp with crickets in

three flavors: Lemon Lime, Cinnamon Cardamom, and

Chili Chocolate.



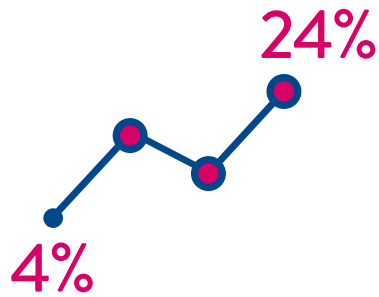
ELEMENTAL SUPERFOOD BARS CURRANT, CACAO & HEMP BARS

Featuring sunflower, pumpkin, flax and sesame seeds, buckwheat and Brazil nuts, these bars are said to support healthy organ and brain function, healthy skin and hair, increase focus and reduce inflammation. Also available in Mulberry, Cacao & Spirulina, Cranberry, Almond & Lucuma and Dark Chocolate & Peanut Butter.



353

BARS LAUNCHED GLOBALLY BETWEEN JAN 2014 AND AUG 2018. ONLY 16 WERE IN NORTH AMERICA.



HEMP AS AN INGREDIENT ROSE FROM 4% OF LAUNCHES TO NEARLY A QUARTER (24%) (Jan. 2012-Aug. 2018)



WE THINK CANNABINOIDS ARE GOING TO BE A NEW CATEGORY OF FUNCTIONAL INGREDIENTS, JUST LIKE PROBIOTICS, OMEGA-3S OR FLAVONOIDS.

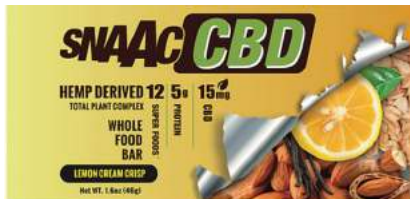
Justin Singer, CEO of cannabinoid supplier Stillwater Brands



PLANT POWER: HEMP_{cont'd}

Another interesting launch is the first bar on the market to feature marijuana-sourced cannabidiol (CBD), a non-psychoactive oil "recommended for pain management, sleep, stress, inflammation and mood recovery."

The SNAAC CBD bars are only available in a few locations in California and come in Chocolate Cherry Almond and Lemon Cream Crisp flavors, both of which contain 15 milligrams of CBD oil.



SPOTTED: HEMP BAR FLAVOR COMBINATIONS

- Coconut + Cashew Butter
- Cacao Nibs + Dates
- Chia + Flax Seeds + Almonds
- Gogi Berries + Honey + Dates
- Turmeric + Cinnamon + Sunflower Seeds + Coconut
- Tahini + Oats + Dates + Maple Syrup

PLANT POWER: BEER



Denise Bronner, postdoctoral researcher in microbiology and immunology at UC Davis, has launched Anu, a bar company that uses leftover grain from beer brewing as the main ingredient. In the brewing process, once the sugar has been extracted, the leftover grain has no real use, and breweries struggle with what to do with the waste. Bronner explains that much of the grain ends up in landfills, but that it's "full of fiber, antioxidants, amino acids and vitamins. And because the sugars have been extracted, it has a low glycemic index."

Bronner sees rich opportunities for the spent grain and hopes to turn it into flour "for baking options like bread, cookies and crackers, or dog biscuits and treats" in the future. But right now, she mixes the spent grain with dried fruits to create bars she describes as "not too chewy, not too crunchy." Flavors are Blueberry Delight with walnuts and a yogurt frosting, Berrylicious with cranberries, almonds and a dark chocolate coating, and non-coated versions, as well.

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A PERSON'S INTEREST PERKS UP AT THE IDEA OF EATING BEER WITHOUT THE ALCOHOL.

Denise Bronner, founder Anu Snack Bars

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PRODUCT OF NOTE

REGAINED SUPERGRAIN BARS



Launched in 2016, Regained bars use spent grain to create snacks in three flavors: Chocolate Coffee Stout Energizing, Honey Cinnamon IPA Immune Supporting, Blueberry Sunflower Saison Antioxidant. Founders Dan and Jordan went from hauling spent grain to dumpsters to upcycling it into functional bars packaged in plant-based wrappers. Their motto is "All taste, no waste!"

ALLERGEN-FREE BARS



EVERY THREE MINUTES, A FOOD ALLERGY REACTION SENDS SOMEONE TO THE EMERGENCY ROOM.



BETWEEN 1997 AND 2008, THE PREVALENCE OF PEANUT OR TREE NUT ALLERGY APPEARS TO HAVE MORE THAN TRIPLED IN U.S. CHILDREN.



ABOUT 1 IN 3 CHILDREN WITH FOOD ALLERGY REPORTS BEING BULLIED AS A RESULT.

BLAKE'S SEED-BASED



Nuts are a great source of nutrition, but if you are one of the millions of people with a nut allergy, these products are not an option. Blake

Sorensen is one of these individuals. His frustration at the number of bars either including nuts or made in a facility with nuts led him to develop his own line of allergen-friendly snack bars featuring seeds such as pumpkin, sunflower and flax in Chocolate Chip, Raspberry, Pineapple flavors. Blake's Seed-Based are certified free from the top 8 allergens and are made in a certified allergen-free facility — the two critical steps for consumers with life-threatening allergies.

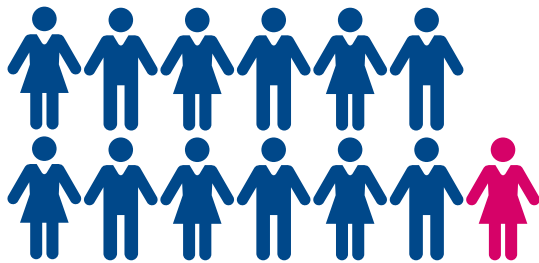


DON'T GO NUTS IS NOT JUST ABOUT KEEPING PEOPLE SAFE FROM NUTS, IT'S ABOUT MAKING PEOPLE FEEL SAFE EMOTIONALLY WITH WHAT THEY PUT IN THEIR BODIES.

Lily Pinto, school-age nut-allergy sufferer, driving force behind her family's company Don't Go Nuts



ALLERGEN-FREE BARS cont'd



According to the Food Allergy Research & Education organization 15 million Americans have food allergies, including 5.9 million children under age 18, which equates to **1 in 13 children**, or roughly two in every classroom. That's a large segment of the population who could be consumers of truly allergen-free snack bars, making this area one product developers should consider.

With allergies being potentially life-threatening and altering how people interact with others, particularly children in school, having a trusted brand that help them feel included and provides flavor variety and nutritional substance could be major wins.



PRODUCT OF NOTE

QUAKER CHEWY PEACH FRUIT CRUMBLE GRANOLA BARS

Made with real fruit and 100% Canadian oats, these bars are free from peanuts and artificial colors and flavors. They are made in a peanut-free facility and contain 10g whole grain per serving.

Canada July 2018



LOW/NO/REDUCED ALLERGEN IS
THE #1 CLAIM FOR BAR LAUNCHES

North America Jan. 2014 - Aug. 2018



SUGAR + KIDS

33% OF PARENTS IN KIND BAR SURVEY SAID SUGAR IS BIGGEST PROBLEM WITH TODAY'S KIDS' SNACK OPTIONS



64% SAID SUGAR IS TOP INGREDIENT THEY WANT TO LIMIT IN SCHOOL LUNCHES



Research shows that parents are concerned about sugar and want to give their children healthy snack options. But they're also busy, tired, and need easy solutions their kids will actually eat. Kind launched its new line of Kind Kids chewy granola bars hoping to address all of those issues. "We know how hard it is for parents to find healthy options that their kids will actually eat," said Jon Lesser, VP marketing for Kind said in Convenience Store News. "That's why, when crafting Kind Kids, we balanced nutritious ingredients with delicious flavor to ensure the bars would be a lunchbox win for everyone." And if they're not? Lesser says they'll refund your money. The bars come in 3 flavors: Chocolate Chip, Peanut Butter Chocolate Chip and Honey Oat.

Only 4% of North American bar launches carry the claim Children (5-12), but the number of launches more than doubled from 2014 to 2016.

Jan. 2014 - Aug. 2018

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KIDS SNACKS OFTEN EMPHASIZE FLAVOR BUT LACK NUTRIENT DENSITY AND INGREDIENT VARIETY

Stephanie Perruzza, R.D. with Kind bars

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SUGAR + KIDS cont'd

Susan Viamari from IRI told *Convenience Store News* that “snack manufacturers and retailers should recognize that Millennials seek a balance between healthy and indulgent snacks” for both themselves and their children. Reviews of Thunderkids bars support this idea. Named a “best snack of 2017” by Health.com, the nut, fruit and spice bars were loved for adults, too, with reviewers saying the smaller size was great for “mini snack attacks” and that they had just the right amount of sweetness to make them a treat.

Viamari explained that Millennials’ desire for balance means snack developers need to offer “healthier and more indulgent options,” but also need to think about how to blend the two, creating “indulgent treats that are healthier and healthy options that are indulgent.”



THUNDERKIDS

Promotes “zero added sugar,” “simple whole foods,” and says they’re a product “moms and dads will feel good about” giving their kids. Flavors: Peanut Butter and Jelly, Chocolate Chip Cookie, Apple Pie, and Fruit Punch.



MORE THAN 50% OF MILLENNIAL MOMS SAY THEIR KIDS ARE MORE LIKELY TO CHOOSE A BETTER-FOR-YOU SNACK COMPARED TO ANOTHER PREPACKAGED SNACK.

2017 study from The Center for Generational Kinetics



THINKKIDS VANILLA CUPCAKE PROTEIN BARS

ThinkKids Vanilla Cupcake Protein Bars’ packaging features a large cupcake (signaling indulgence), but highlights 7g protein, 3g fiber and 4g sugar per serving, as well as being free from artificial flavors, colors, high fructose corn syrup, GMO and gluten (signaling health).

THE TAKEAWAYS

From savory breakfast bars to high protein bars for kids, this category's continued innovations and consumers' continued demands for portable, snackable items that are more than empty calories keep the market evolving and product developers creating. Products addressing rising concerns such as food allergies, sugar and food waste provide opportunities for product developers looking for new ways to connect with consumers.

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/

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