Healthy Snacking Trends in Europe

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While snacking is an integral part of most consumers' diets, the pandemic and its associated stressors have influenced what's driving consumers to snack. This guide features an in-depth look on the latest snacking trends, including deep dives into consumer drivers in healthy snacking and bars in key European countries and globally.

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The pandemic is causing a shift in how and why European consumers are snacking.

According to The Hartman Group, besides the core snacking drivers of nourishment (for sustenance and health), optimisation (for physical and mental performance), and pleasure (for indulgence and discovery), COVID-19 has given rise to a new snacking driver: distraction.[1]

This expansion of snacking need states to include distraction comes at a time when consumers' lives have been turned upside down. Anxieties about catching the coronavirus, potential or actual job loss, and the state of the economy, combined with the challenges of lockdown such as social isolation and boredom have led to a strong desire for distraction. Key attributes of snacking for distraction include a lack of attention while eating, stress eating, and a preference for highly processed, low- or no-prep snacks.

Current Snacking Drivers in Europe

To understand how this desire for distraction might be influencing European consumers, Glanbia Nutritionals surveyed consumers in the UK, France, and Germany about their snacking habits. The results reveal 38% of consumers in Europe often snack while they're bored, while 50% snack to cope with stress or frustration.[2] These results confirm that distraction is indeed a major snacking driver in Europe.

At the same time, optimisation and nourishment remain important reasons for snacking for many European consumers. For example, 42% of consumers indicate snacking is a way for them to refuel after strenuous activity (physical optimisation), and 26% snack throughout the day to manage their alertness or focus (mental optimisation).[3] Snacks to support this need state often include important nutrients like protein, vitamins, minerals, and/or functional ingredients like caffeine or botanicals.

Snacking for nourishment also plays a key role in many consumers' daily diets, with 33% of Europeans using snacking to control calories as part of weight management and 22% snacking for sustained energy to get through the day.[4] Consumers snacking for nourishment may choose to snack on foods and beverages with whole grains, fibre, protein, and healthy fats—particularly those with minimal sugar.

United Kingdom

One in three (33%) of UK snacking consumers admit to eating more when people aren't around. The survey found[5] that 49% of those who snack are more likely to choose a healthy product at home than outside of home (10%) and in the workplace (10%). Nearly half (49%) of hybrid workers (working both at home and in the office) said they will be conscious of what they eat to stay healthy while hybrid working.

Of those working in a hybrid pattern, a quarter said they would eat more snacks as meal replacements, while 31% agreed they'd choose more on-the-go snacks as a result of their working routine.

However, those who eat 'healthy' snacks have different views on what is important depending on their age group: 'low in calories' topped the charts for Gen Z (25% of 16 – 24 year olds) while the over 55s look for 'low/no sugar' (36%). Protein is a priority for millennials (25– 34 year olds), with 18% looking for protein-rich healthy snacks.

Women who snack are more likely to do so for reasons other than nutrition: over half of UK consumers (54%) admit to snacking when they are bored – rising to 62% for women. Over 40% of men and 53% of women use snacks as a reward or to treat themselves.

Stress is another key factor for females who snack, with 46% of women claiming to use snacks to cope with frustration, compared to just 26% of men. This has been the primary driver for a rise in demand from brands for solutions such as neuro-enhancing adaptogens, with over half of 25-44 years stating that they find ingredients with calming effects appealing.[6]

France

Over half of those who snack (55%) admit to snacking when they are bored – rising to 59% for women, according to the survey.[7] Fourty-nine per cent of men and 55% of women use snacks as a reward or to treat themselves.

Fourty-nine per cent of women who snack claim they are doing so to cope with stress, compared to just 36% of men.

Results indicated that over half (58%) choose cookies and cakes to snack on. Fifty-three per cent of those who regularly snack are more likely to choose a healthy snack at home, compared to 9% outside of home and 10% in the workplace. Six in ten hybrid workers, said they will be conscious of what they eat to stay healthy while hybrid working.

Of those who are working in a hybrid pattern, 37% of survey respondents said working from home and in the office, would mean eating more on-the-go snacks while a quarter agreed they'd use snacks as meal replacements, as a result of their new set up.

For French consumers who claim to eat healthy snacks, the importance of no added sugar (27%) low calories (26%) and low sugar content (25%) remains consistent across the generations, with all age groups choosing these as their top priorities. Protein is important for healthy snackers too, with 15% of 25-34 and 35-44 year olds looking for snacks that are high in protein.

Germany

A quarter of German consumers admit to snacking more when no one is looking, but choose more healthily at home, based on the analysis of results from Germany.[8]

Healthy Snacks Driving Global Market Growth

The global health & wellness snacks market is forecast to reach $98 billion by 2025, growing at a CAGR of 5.8% between 2020 and 2025, according to Euromonitor.[9]

Nuts, seeds & trail mixes continue to lead the market, with a revenue share of 41%, followed by snack bars with 20% share.[10]

While North America is currently the largest market for healthy snacks, consumers in emerging economies in Latin America, Asia Pacific and the Middle East & Africa, are experiencing a shift in consumption patterns and increasing disposable incomes that could lead to high future growth in healthy snacks.

Clean label, sustainability and functional ingredient claims are driving snack food sales. According to Mintel Global Product Launch database, in the previous five years, snacks with a vegan/no animal ingredients claims grew by 11.8% annually, environmentally friendly packaging grew 7% annually, snacks with high or added protein grew 11.5% annually, and those with no or reduced sugar grew by 13.4% annually.[11]

The survey found that of those who snack more than once a month, 50% are more likely to choose a healthy snack at home compared to 13% outside of home and 11% in the workplace. 52% of hybrid workers, working from home and an office, said they will be conscious of what they eat to stay healthy in their new routine.

Nearly 1 in 3 (27%) of those with a hybrid working pattern said they will eat more snacks as meal replacements, while 37% agreed they'd choose more on-the-go snacks as a result of their new set up.

For German consumers who claim to eat healthy snacks, 'low/no' sugar was the highest priority claim across all age groups, while other factors had varying importance to different generations: no additives came second for 35-44 year olds (27%) while vitamin and mineral content is a key factor for 30% of millennials (25 - 34 year olds), closely followed by 23% looking for protein-rich healthy snacks.

Germans who snack are more likely to do so for reasons other than nutrition with over half (55%) using snacking as a reward – rising to 58% for women.

Balanced Snacking Is the New Normal

Despite the high levels of snacking for distraction that have emerged in Europe, there are signs that the COVID pandemic has also made consumers more aware of the importance of healthy eating and choosing healthier snacks. The research shows 32% of European consumers became more conscious of the snacks they were eating to stay healthy during the pandemic. [12] Looking ahead, almost the same number (33%) say they will be more conscious of what they eat to stay healthy as they enter a new hybrid of working from home and the office.[13]

This indicates a new normal in snacking among European consumers that centres on finding the right balance of enjoyment and wellness in a snack. Highly processed, low- and no-prep snacks preferred for distracted snacking that are also formulated with health in mind can address this need. This might include added protein or vitamins and reduced calories, as well as less sugar. These snacks could even include functional ingredients associated with stress relief and mood support.

While consumers in Europe will continue snacking for a variety of reasons, expect that the new awareness of the importance of healthy eating will affect consumers' snacking choices going forward. Brands that make sure even their most indulgent snacks offer some health benefits are likely to appeal to a large number of consumers and meet the emerging need for more balanced snacking.

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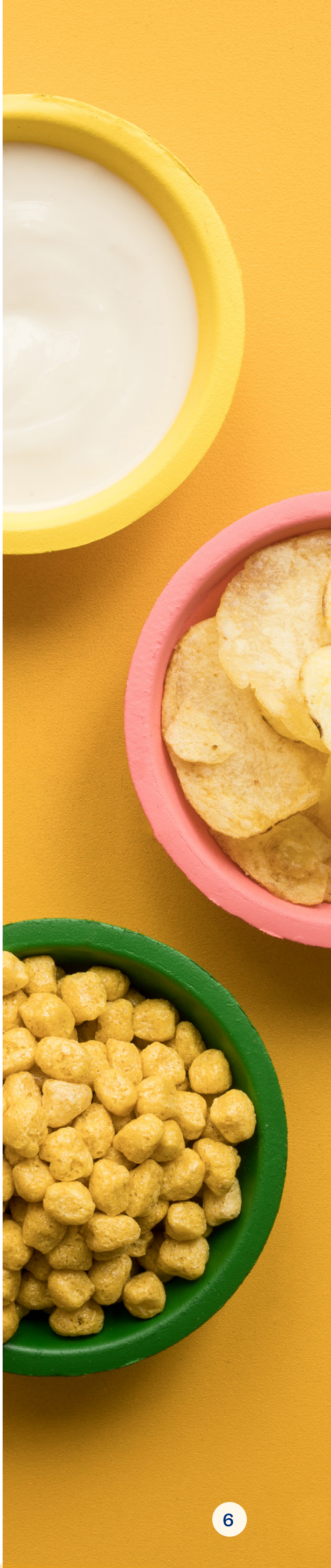
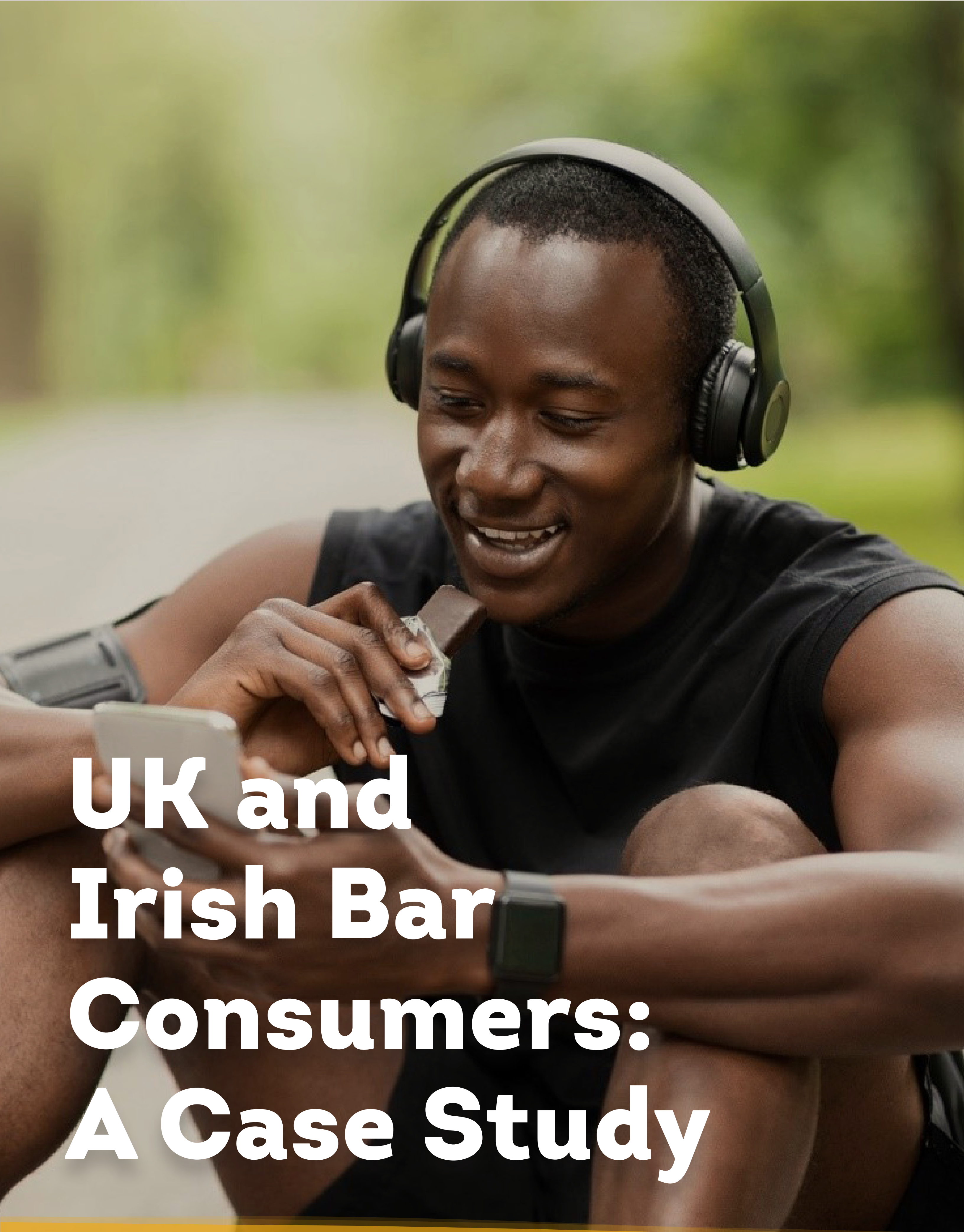




UK and Irish Bar Consumers: A Case Study

UK and Irish Bar Consumers: A Case Study

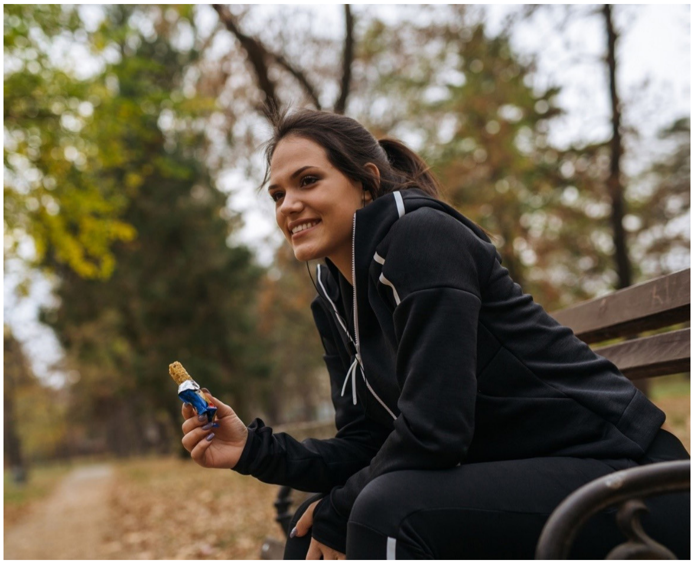
The past year has brought a number of changes in consumer eating habits—particularly around snacking.

Glanbia Nutritionals' recent proprietary consumer research explores the latest UK and Irish consumer preferences in bars and other snacks, including the top purchase channels and consumers' strong interest in protein.

Glanbia Nutritionals' Consumer Survey Methodology

To understand UK and Irish consumers' attitudes and behaviours around snacking, with a focus on bars, in particular, Glanbia Nutritionals went straight to the source. Our proprietary primary research study[1] surveyed over 800 bar consumers (those that consume a protein bar or granola/cereal/snack bar at least every 6 months), split evenly between the UK and Ireland, to learn about their snack consumption and purchase habits, as well as what they're looking for in these products.

Here's a look at some of the top insights from our research—plus key takeaways for bar manufacturers.



Bar Preferences in the UK and Ireland

In looking at bar consumption, our study shows the consumption of granola/cereal/snack bars and candy bars is pervasive among bar consumers, with 96% eating granola/cereal/snack bars and 94% eating candy bars at least occasionally. In addition, nearly two-thirds of bar consumers in the UK and Ireland are consuming protein bars.

Compared to one year ago, consumption of bars among these consumers is slightly up. Protein bars have seen the highest increase, with 26% of bar consumers eating more protein bars. Consumption has also increased for granola/cereal/snack bars and candy bars (by 25%). However, another 21% have decreased their candy bar consumption, indicating an overall trend toward healthy snacking during the pandemic.

Top Purchase Channels for Bars

Our consumer study also investigated the preferred shopping locations for bars and other snacks. For granola/cereal/snack bars, 74% of consumers typically buy at the supermarket, followed by 8% at the convenience store—similar to the purchasing patterns for salty snacks and sweet snacks.

Protein bar purchases follow a pattern more similar to those of energy and sports drinks, with 54% of consumers typically purchasing them at the supermarket, 16% at the convenience store, and 11% at the petrol station. However, a significant proportion of consumers (8%) buy protein bars online.

Spotlight on Protein

With protein as one of today's biggest healthy snack trends, we also did a deep dive with a subset of about 200 protein bar consumers to understand how important protein is to UK and Irish protein bar consumers, as well as preferences in protein type. The results show that one in three protein bar consumers feels "high protein" is an important attribute for bars. In choosing the single most important attribute of bars, "high protein" came in second, after taste.

What type of protein do you prefer protein bars to contain?

Source	Total	UK	Ireland
Naturally-occurring protein	36%	40%	32%
Whey protein	35%	30%	39%
Milk protein	29%	29%	28%
Rice protein	21%	25%	18%
Soy protein	19%	28%	11%
Lentil protein	14%	18%	11%
Hemp protein	12%	13%	12%
Pea protein	9%	10%	8%
Not sure/I don't care	17%	19%	15%

Clean label ingredients also continue to be important in the UK and Ireland, with "naturally-occurring protein" preferred by 36% of protein bar consumers. For specific types of protein, whey is the top choice, at 30% of UK protein bar consumers and 39% of Irish protein bar consumers, followed by milk protein. Rice and soy are the most preferred plant proteins, with UK protein bar consumers over-indexing on the preference for soy.

Why Consumers Are Choosing Bars

Our consumer research reveals the top two reasons UK and Irish bar consumers choose bars (including protein bars and granola/cereal/snack bars) are that they're "easy to grab and go" (49%) and "convenient" (48%). Other important reasons are that consumers "like the taste" and "it's healthy" (both at 41%).

This indicates that healthy snacking continues to be important to consumers during the COVID-19 pandemic and that bars are effectively meeting this need. In addition, the majority of bar consumers are checking the nutrition and ingredient labels of products at least sometimes (78% for UK and 73% for Irish bar consumers).

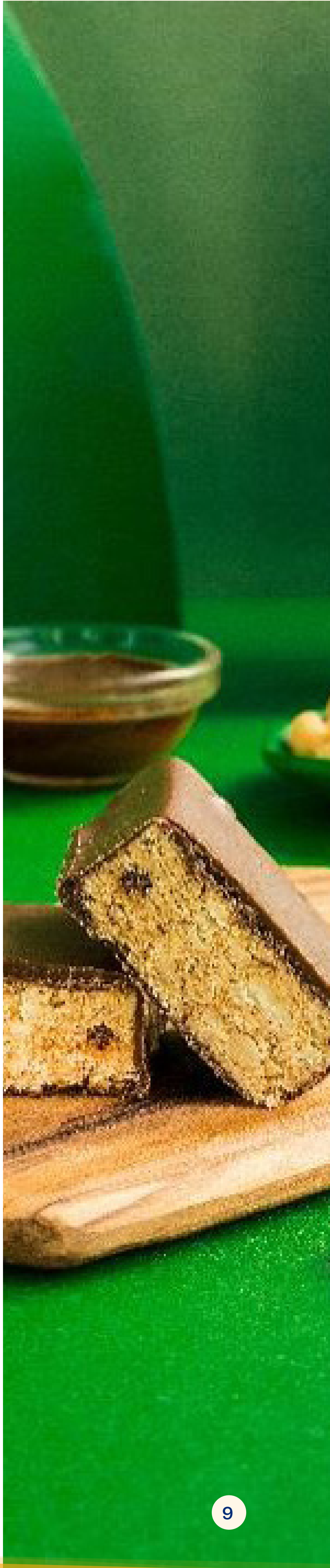
What Consumers Are Looking for in Bars

We also asked consumers which attributes are important to them when it comes to bars. For both UK and Irish bar consumers, taste is the most popular answer, followed by price. Next in line are attributes that touch on health and nutrition: low/no sugar, high protein, no added sugar, low in calories, and low in fat. For 1 in 4 bar consumers, all-natural is also important.

Our study probed further to see if those with concerns over sugar have a preference in the amount of sugar when they look for low sugar bars. The data shows that most bar consumers are looking for five grams of sugar or less, while many are unsure. In addition, honey is the most positively perceived sweetener, followed by agave nectar, maple syrup, stevia, and monk fruit.

Trend Watching

We also asked consumers which attributes are important to them when it comes to bars. For both UK and Irish bar consumers, taste is the most popular answer, followed by price. Next in line are



attributes that touch on health and nutrition: low/no sugar, high protein, no added sugar, low in calories, and low in fat. For 1 in 4 bar consumers, all-natural is also important.

When it comes to bars, which attributes are important to you?

Attribute	% of consumers
Taste	60%
Price	46%
Low/no sugar	33%
High protein	32%
Low in calories	29%
Low in fat	27%
All natural	26%
Texture	21%
No artifical color/flavour	19%
No preservatives	15%
Brand	13%

Clean Label

Results show that three out of four bar consumers believe it's moderately to very important that a bar has a "clean label," with 41% of UK bar consumers saying it's very important vs. 29% of Irish bar consumers. Most consumers determine if it's clean label by checking ingredients on the ingredient list (70%) and the messages on the packaging (51%). In addition, 46% look for a short ingredient list to decide if a product is clean label.

Vegan Claims

For the 5% of bar consumers who indicate a vegan claim is important for a bar, 68% say it's moderately to very important. Furthermore, 50% of Irish and a whopping 79% of UK bar consumers who value a vegan claim say they would buy the product if it was marketed as vegan. For the consumers who did not indicate a vegan claim was important, 57% say they have a neutral perception of vegan products, while 32% have a positive view.

Packaging

Packaging attributes that can influence consumer purchases are diverse and range from sustainability to convenience to visual appeal. For UK and Irish bar consumers, recyclable packaging is what the majority are looking for (74% in the UK and 57% in Ireland) in the packaging of bars. Since most bar wrappers are not easily recyclable, this indicates a key opportunity for manufacturers. Most consumers are also looking for bars in packaging that's easy to open.

Addressing Trends and Looking Ahead

These results show that bars are still very much in demand in the UK and Ireland, especially if they can offer consumers healthy snacking benefits like added protein. The right type of protein is also important to meet consumer demand and should be tailored to the specific market. Consumers' preference for naturally occurring protein also signals continued interest in clean label ingredients that bar and snack manufacturers can emphasize in their front-of-package claims and other communications.

There's no doubt that the grab-and-go convenience and great taste of bars make them a favorite snack among UK and Irish consumers. But beyond meeting these expectations, manufacturers who address current trends—such as healthy nutrition profiles, clean label ingredients, and more sustainable packaging—will be well-positioned for growth ahead.

Source

Glanbia Nutritionals Proprietary Study – Bars in the UK & Ireland, December 2020. Base: 801 bar consumers (or those that had consumed a protein bar or granola/cereal/snack bar at least every months).

Plant Focused & Planet Friendly

Plant-based products continue to gain traction across Europe.

Plant-based products are showing steady growth in the European market, with the pandemic spurring even greater interest in plant-based nutrition. Explore the rise in vegan claims along with key drivers and the most popular product categories and claims.

Vegan Launches Trending Up Across Europe

Vegan product claims continue to grow across Europe. The percentage of new foods and beverages launched in Europe that included a vegan claim quadrupled between 2014 and 2020, growing from 3% to 12%.[1] Germany had the highest percentage of vegan claims in new products in 2020 at 22%, followed by the UK at 19%, the Netherlands at 14%, and Spain at 10%.[2]

There are signs that the COVID pandemic has given plant-based nutrition a boost. Mintel reports 17% of consumers in Spain, 13% in France and Germany, and 12% in Italy indicate the COVID pandemic has made a vegan diet more appealing to them.[3] Two out of five German consumers and at least one in three Spanish consumers agree the pandemic proves people need to eat fewer animals.[4] According to FMCG Gurus, one in five German and French consumers plan to change their diets to include more plant-based foods going forward.[5]

Key Drivers and Preferred Plant-Based Products

Top reasons for adopting plant-based or plant-centreed eating include health, the environment, and animal welfare. For example, FMCG Gurus reports that among UK consumers who plan to add more plant-based foods to their diets, 63% believe plant-based foods are healthier, 59% believe they're better for the environment, and 22% are concerned about the welfare and treatment of animals, with plant-based milk and plant-based meat the preferred product choices.[6] German consumers show similar product preferences.

Plant-Based Products Consumers Plan to Increase[7]

Among those planning to boost plant-based intake

Product Type	UK	Germany
Plant-based milk	48%	60%
Plant-based meat	41%	50%
Plant-based meals	24%	22%
Plant-based yoghurt	18%	17%
Plant-based cheese	15%	12%
Plant-based ice cream	14%	5%
Other plant-based beverages	10%	8%
Other	19%	10%

Plant-Based Snack Trends

The rise of snacking due to COVID lockdowns has made snacks a particularly important area to watch for plant-based innovation. Plant-based snacking options range from bars to plant-based dairy alternatives like beverages and yogurts. According to Mintel, 26% of UK consumers and 20% of Irish consumers indicate they're more likely to eat snacks with a vegan label, with younger consumers showing the strongest preference for snacks with vegan claims.[8]

Among new snack launches in the UK and Ireland in the past five years, vegetarian is the leading claim at 50%, while 28% list a vegan claim.[9] Protein and fibre are also trending in snacks; 16% of new snack launches in this period contain high or added fibre claims, while 12% contain high or added protein claims.[10]

For bars, plant-based claims grew an impressive 220% between 2019 and 2020 in UK and Ireland new product launches, making it the fastest-growing claim in the category.[11] Ethical claims around packaging are also on the rise, with 39% of new bar launches claiming environmentally friendly packaging and 29% including a recycling claim.[12]

In plant-based beverages, yogurts, and ice creams, vitamin and mineral fortification is the trend to watch. Vitamin/mineral fortified takes the lead in "plus" claims in these categories in new product launches in Europe.[13] Calcium and other nutrients associated with traditional dairy products are an important part of delivering the healthy nutrition consumers expect.

Connecting with the Plant-Based Consumer

Across product categories, an important strategy for connecting with plant-based consumers is communicating important product benefits quickly. Key terms being leveraged by European food and beverage companies include plant-based, vegan, sustainability, and animal welfare. These are increasingly found on product packaging, as well as in digital brand messaging.

Since health is the top motivator for many consumers seeking plant-based products, the addition of relevant health and nutrition claims can also be effective. Added vitamins and minerals, high fibre, and high protein are all claims that signal to consumers they're making a healthier choice by purchasing that plant-based product.

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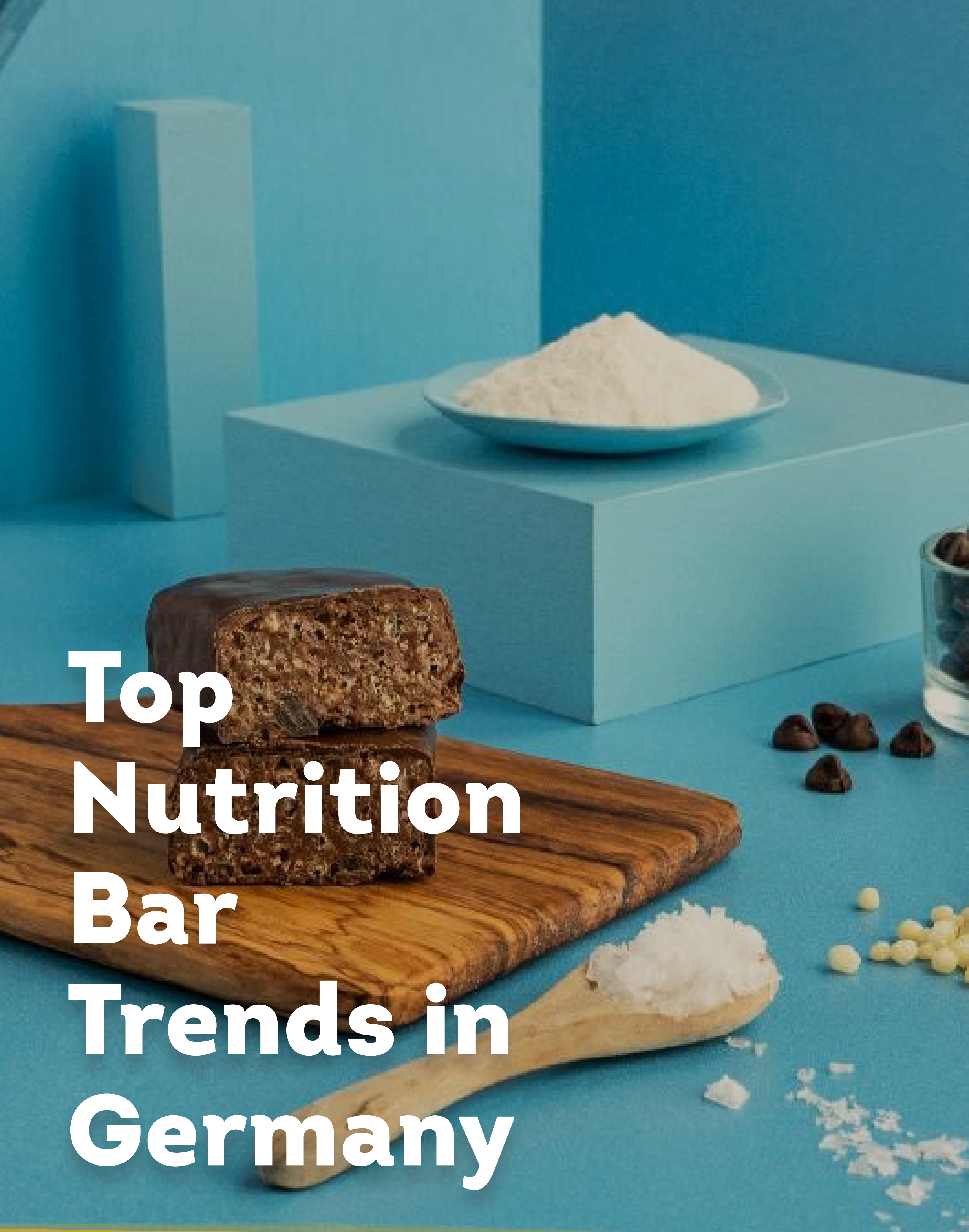

Top Nutrition Bar Trends in Germany

Top Nutrition Bar Trends in Germany

As Germany's nutrition bar market continues to evolve, see how trends in ingredients, claims, textures, and formats are creating exciting new opportunities.

With an estimated €317 million in sales last year, Germany's retail bar market is forecast to grow at a CAGR of 6.4% through 2025 to reach €433 million.[1] Schwartauer Werke continues to lead the category, claiming a 43% market share.[2] However, private label also plays a major role in the German bar market, making up 38% of the market.[3]

Within the bar category, the €40 million retail protein/energy bar segment (CAGR 4–6%, 2020–2025) represents a dynamic area with a number of players competing on innovation.[4] The top five brands in the German protein/energy bar market—Myprotein, Multipower, Champ, PowerBar, and Power System—account for 61% of the market, with Myprotein leading at 16% market share.[5] During the past three years, brands in the top five saw sales growth ranging from 3 to 7%.[6]

A Look at Nutrition Bar Trends in Germany

While the need for convenience is high in Germany due to increasingly busy lifestyles, the focus on health is also growing, especially since the COVID-19 outbreak. This is creating new opportunities in the protein/energy bar segment since these products can deliver healthy convenience along with an enjoyable sensory experience.

Here's a look at Germany's nutrition bar trends that manufacturers should know:

New Texture and Format Experiences

German snack bar consumers are seeking bars that can give them new sensory experiences—especially in texture and format—with 82% indicating they enjoy experimenting with new types of bars.[7] These consumers are interested in mini or bite-sized formats (61%), bars with multiple textures (40%), and bars with fillings (37%).[8] Innovative product examples include Seeberger Bites 2go for a fun, snackable format and Corny My Style bar in Chocolate Brownie Shake that blends crispy and creamy textures.

Less Sugar

Another trend to watch is German consumers' demand for products with less sugar. A whopping 55% of Germans think snack bars contain

The Shift Towards Conscious Indulgence

The trend in conscious indulgence continues to shape snacking preferences, with 64% of global consumers believing it's okay to enjoy indulgent treats as part of a healthy diet.[1]

The craving for a decadent treat now and then, whether it's biscuits after a long workday or ice cream as a bedtime snack, is familiar to most of us. Even among the healthiest eaters, moments of feeling good matter.

As more consumers seek to balance the desire for indulgent treats with healthy eating, what they're looking for in a snack is shifting.

The trend in conscious indulgence represents the growing demand for indulgent treats that are healthier in some way than the traditional versions. This includes indulgent high-protein snacks such as protein cookies, muffins, and brownies, as well as ready-to-drink shakes and lattes that offer functional nutrition. Even smaller portions meet this trend—for example, protein or energy balls in decadent flavours.

Adding protein to an indulgent snack is a clear opportunity to achieve better-for-you positioning. Protein cookies, brownies, and snack cakes are all examples of products found in the sports nutrition section that have enormous potential to engage mainstream consumers.

too much sugar.[9] 'No added sugar' claims are on the rise in bars, showing brands are responding to this need. Last year, 1 in 5 bars launched in Europe featured a 'no added sugar' claim; in Germany, this was 1 in 4.[10]

Functional Benefits

German consumers are also expressing interest in bars with specific functional benefits for physical or mental health. For example, 32% of German consumers are interested in snack bars that help them focus, while 29% are interested in bars that can help them relax.[11] More than 1 in 3 have an interest in snack bars that can support a healthy gut.[12] Bars for weight loss support (such as One Meal +Prime) will be particularly important post-COVID, with protein as a key ingredient. Protein is an in-demand ingredient for a variety of reasons, with 40% of last year's bar launches in Germany containing a high or added protein claim.[13]

'Cleaner' Bars

Clean label messaging is also trending in Germany's nutrition bar market as brands look for new ways to stand out as a healthier option and build trust with consumers. Examples of products focusing on clean label strategies include Sponser's Pure & Natural vegan bar with a "free from additives" claim and Enervit's The Nature Deal raw bar which features the EU organic logo. Calling out whole food ingredients on the front of the package is another appealing approach.

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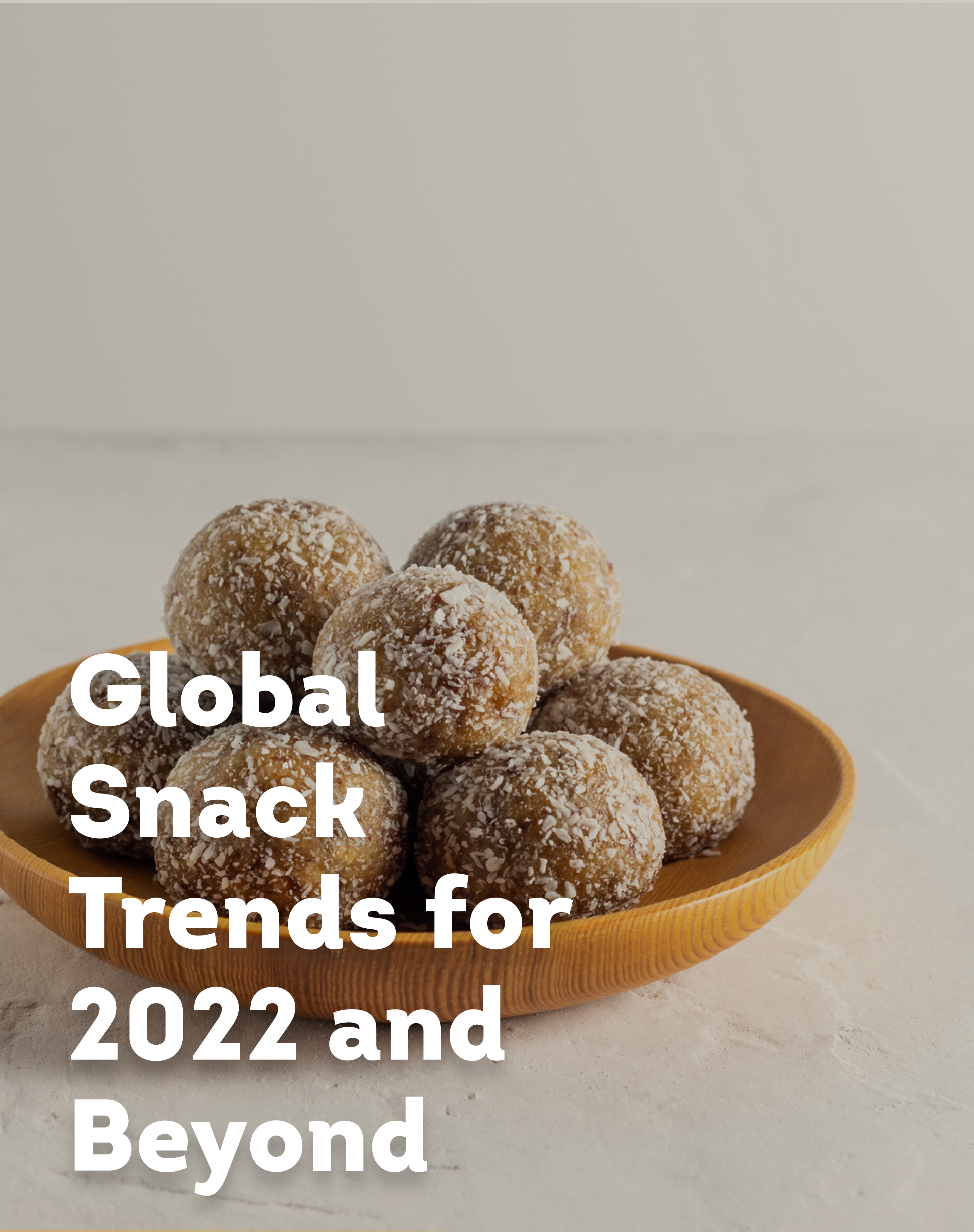

Global Snack Trends for 2022 and Beyond

Global Snack Trends for 2022 and Beyond

While the definition of a snack may vary, from country to country or by generation, the snacking occasion is growing.

The pandemic may have affected where global consumers eat snacks, but the occasion continued to thrive in the home and around the world. Over half of global consumers consider a snack to be either single serve or something that offers a nutritional boost.[1] So snacks that offer a health benefit like protein or provide upscale ingredients and are convenient are the future of snacking.

Drivers of Snackification

The Hartman Group identified "a cultural shift toward regular and frequent snacking sprung from a variety of factors", including:

- New time pressures and the upending of daily food rituals
- Broadening diversity and accessibility of cuisines and food
- Increasing attention to food & beverage solutions to support wellness
- Heightened awareness of sustainability[2]

Snacking Occasions

Marketers and product developers of snack foods may wish to tailor their products to specific snacking occasions to ensure the ingredients and messaging are on target with consumer needs for that time of day. The main snacking occasions have been identified as:

- Early morning
- Mid-morning
- Afternoon
- After dinner
- Late night

For example, a high-fibre, milder flavoured snack may work well as an early morning snack, whereas a sweet snack may be a better fit for the late night.

Nutrition Trends

Protein

The popularity of high-protein snacks is a top trend, with 51% of global consumers stating they've switched from traditional snack products like chocolate and confections to high protein/low sugar alternatives.[3] Millennials are driving this interest in high-protein snacks which provide satiety and work well as meal replacements. The bar category continues to be strongly affected by this trend, with protein bars leading category growth. Of global snack bar launches in 2020, nearly 1 in 3 featured a high protein claim.[4]

Chips, puffs and popcorn have been getting protein makeovers in the last few years. Market leader Quest Nutrition Protein Chips offer 19 g of dairy-based proteins with nine essential amino acids and 4 g of net carbs per serving. Icon Meals Protein Popcorn comes in a variety of flavours from Peanut Butter Vanilla to Orange Creamsicle and Canadian Maple. One cup of their popcorn contains 10g of protein. Protein balls, which are a bite-sized alternative to bars, offer a new format for snackable protein. Protein balls have been popularised by Bounce Energy Protein Balls across the globe, with brands across Europe jumping on the trend including: The Protein Ball Co. and Tribe Nature Bombs, Prozi Mix & Nibble Protein Balls, Foodspring and Health Lab.

Functional

As concerns over health increase, functional snacks are also expanding. Fortified vegan snacks that contain ingredients like turmeric and probiotics to inherently good superfoods, snacks that offer functional nutrition represent the next frontier in healthy snacking. Leading functional snack trends include energy, focus, and calming/relaxation. Functional foods and beverages especially popular as snacks include bars and ready-to-drink beverages. Clear messaging around the product's benefits is key as consumers may not always be familiar with the individual ingredients.

Adding a custom nutrient premix is a fast way to incorporate healthy nutrients like omega-3 fatty acids, amino acids, vitamins, minerals, botanicals, and even probiotics into a snack food.

Trending Ingredients and Flavours

Manuka Honey

From the Mori name of the tree, manuka honey is produced by European honey bees. This specialty honey has a strong, aromatic flavour. Product launches globally with manuku honey or manuku honey flavour has grown annually at an average of 47% since 2016.[5]

Cheese

Cheese is having a revival in the snacking space. Not only as a stand-alone product or in a healthy snack kit like Sargento Balanced Breaks, but globally as a flavour or ingredient. European varieties of cheese are popping up in Asian snack brands including Bourbon Cheese Jaga Camembert Cheese Potato Chips (Japan), Sunbites Italian Parmesan Cheese Baked Multigrain Snacks (Thailand), and Homeplus Signature Gorgonzola Shrimp Snack (South Korea).

Truffles

The distinct flavour of fresh, shaved truffles or truffle oil over a dish is a widely celebrated culinary delight. This year, the taste of truffles has expanded beyond fine dining into retail packaged products, including snack foods. In 2020, Nestle introduced three new Quality Street truffle boxes in Europe, called Intrigue, to add a premium line to their confection brand. Waitrose in the UK featured a limited time offering for the holiday season of Black Truffle Hand Cooked Potato Crisps.

Indian Inspired

Globalization of flavours is on the rise, and Indian flavours are spicing things up. Indian-spiced snacks like Garam Masala, Tamarind Sesame, and Chai Masala are showing up in snacks globally. Indian flavour combinations present an opportunity to combine sweet and savoury which may entice consumers to try a new product. According to a survey by Mintel, 41% of UK snackers agree that sweet snacks containing spices are appealing.[6]

Nutrition Trends

Sugar Reduction

The lower sugar trend is showing up across multiple food categories with claims that include reduced sugar, low sugar, no sugar, and no added sugars.

While savoury snacks—such as roasted chickpea snacks, ancient grain crackers, and veggie chips—have an inherent advantage here, great strides are being made in creating delicious, low and no sugar nutrition and snack bars, as well as sports nutrition and meal replacement beverages.

Consumer preference for clean label has made stevia a go-to ingredient for manufacturers working to meet the growing demand for lower sugar snacks.

Trends in Blends

Snackfections

"Snackfections" is a term coined by the Hershey Company a few years to describe a new hybrid category that combines traditional confections with snacks. Several confection companies have pursued product innovation in this area in response to slowing growth in confections, with impressive success. Consumers looking to find snacks that allow for a conscious indulgence is helping to drive brands not only in confections but in the health & wellness category as well. Globally, 64% of consumers believe it is okay to enjoy indulgent treats as part of a healthy diet, while 54% indicate they expect snacks to offer a nutritional boost.[7] The overlap of these two trends has created a space for a hybrid snacking category that combines indulgence with convenient nutrition.

Snackfections often blend indulgent ingredients and flavours like chocolate or caramel with nuts, seeds, fruits, cookie pieces, or pretzels, which can be combined in a variety of ways beyond snack mixes.

Snackfections also provide an opportunity for snack companies to incorporate a little indulgence, especially via chocolate, into their products.

'Fusebiquity'

A new term coined by Datassentials, "means combining early stage flavours that may be a little too new for consumers with dishes and flavours that they know and love."[8]

Providing the path to an approachable adventure, many brands are choosing to featuring novel flavours with ubiquitous formats or flavour combinations to ease consumers into authentic regional flavours.

This is particularly appealing to younger consumers globally.

Some examples of this include in Japan Pringles London Fish & Chips Potato Chips or Frito Lay Premium Popcorn with Lipton Milk Tea, in China Lay's Refreshing Lime Flavoured Taro Chips, in Canada ActivPop! Sweet 'n' Salty Organic Popcorn with activated charcoal and Honest Artist Range 70% Chocolate with Miso and Tamari Sunflower Seeds in South Africa.

Looking Ahead

It's no surprise that consumers look forward to new flavours and sweet treats, but what stands out the most this year is the interest in healthier snacks. When that snack attack comes, increasingly, people want to feel good about their choices.

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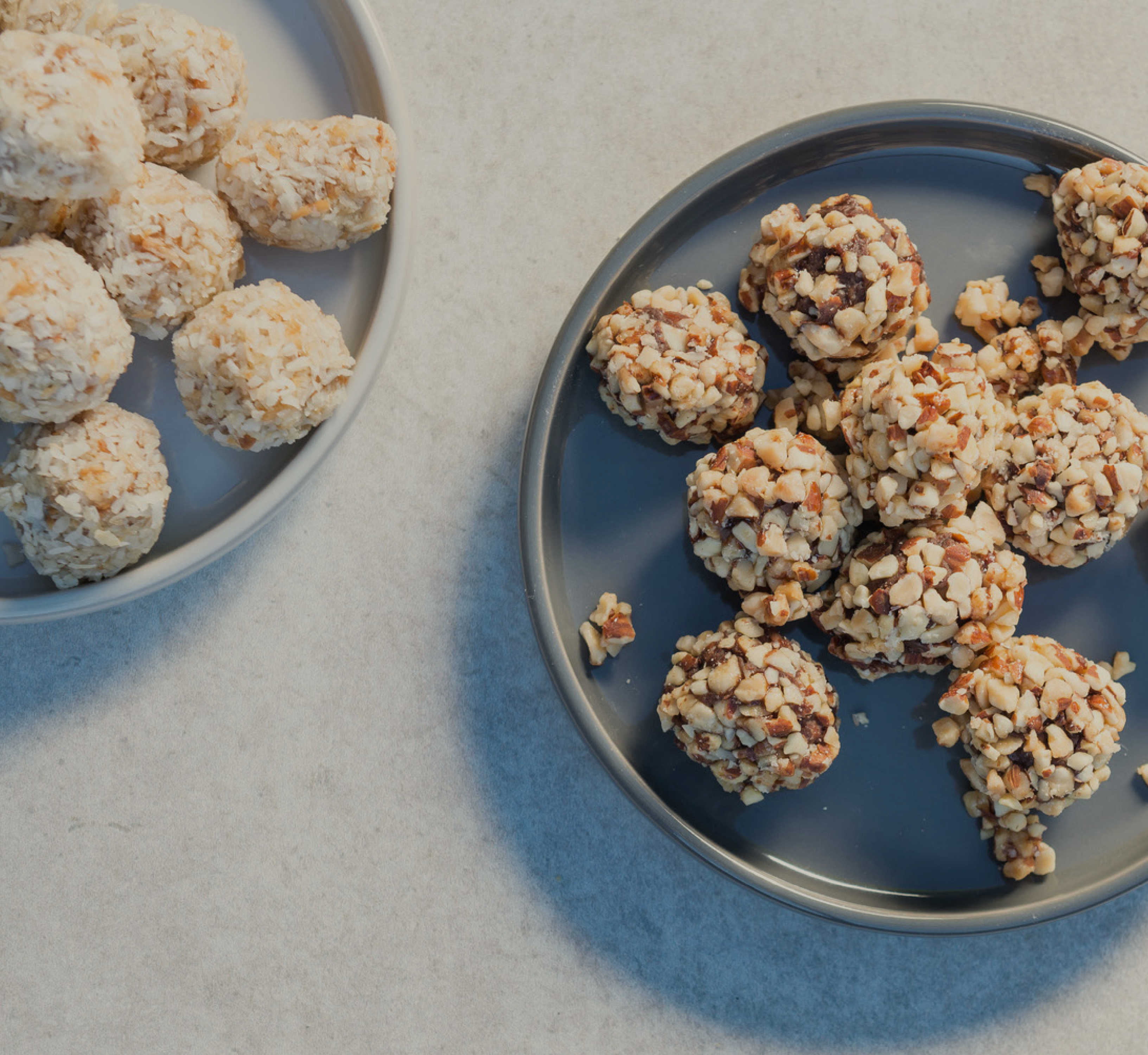
The Grab-and-Go Consumer

Grab-and-go foods and beverages are a way of life for many consumers. Drivers include on-the-go lifestyles that require portable meals and snacks, as well as the anytime convenience of ready-to-eat and heat-and-eat foods.

While the pandemic may have led us to the next normal, most consumers eating patterns were not signficantly affected.

As was prevalent before the pandemic, the line between meals and snacks continues to blur. According to the Hartman Group, 70% of Americans snack on an average day.[9]

In China, consumers snacked more frequently in 2020 than 2019, according to Mintel.[10] In Ireland, 84% of consumers say they snacked at least once per day.[11]



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