Nutritional Food and Drink - US - January 2013

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"The blurring of lines between snack bars, cereal bars, performance bars and nutrition bars means nutrition bar makers need to work even harder to differentiate their products from others on the market while appealing to the same consumer preferences that snack bars do."

– Sarah Day Levesque, Food Analyst

In this report we answer the key questions:

- How can nutrition and diet bars differentiate from other bars?
- Why aren't parents buying nutritional food and drink for their kids?
- How can nutrition and diet products attract more men?

After three years of slow sales growth the nutritional food and drink market grew in 2011 and 2012. Americans are increasingly health conscious, motivating many consumers to seek more nutritious food alternatives. Nutritional food and drink companies have found success in meeting consumers' increasing demand for nutritious snacks, meal supplements, diet tools and fuel. Increasing competition from a variety of categories, including snack foods and snack bars, means that nutrition bar companies need to more clearly define the additional nutritional and functional benefits of nutrition bars that set them apart from competing products. Repositioning products to serve a wider variety of functions and attract a more diverse range of consumers will be key for companies to accomplish this.

Among the topics covered in this report are:

- What is driving the nutritional food and drink market as well as the current market size and future projections?
- How can nutritional food and drink companies leverage trends in healthy eating and concerns over obesity to grow sales in the category?
- Which companies have been the most aggressive in terms of marketing, product mix and product innovations, and are they in sync with what consumers are most interested in?
- What factors influence consumer behavior and what matters most to consumers?

This report builds on the analysis presented in Mintel's *Nutrition and Energy Bars—U.S., February 2012*, as well as the February 2011, March 2009, March 2007 and May 2005 reports of the same title. It also complements the *Meal Replacement Food and Drink—U.S.*, June 2011 report.

Mintel recognizes that the definition of nutritional food can be subjective, and manufacturers can market brands for a variety of eating occasions. Consumers know that the same product can be used as a snack, a meal replacement, a supplement, or as part of a special diet or weight loss program.

For this report, Mintel defines nutritional food and drink as those products that offer nutrition and convenience, and fill a specific need, such as providing additional added amounts of vitamins/minerals than are found in a regular diet or that are needed to support a special diet. Mintel has segmented the market into three main types of nutritional foods:

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Health/nutrition bars are classified as general-purpose nutrition bars, and include products like LUNA BAR, CLIF BAR, Balance Bar, and Fiber One bars. These items generally include additional nutrients such as fiber, protein, calcium, iron or vitamin D.

Diet bars are meant to be used for diet and weight loss/management purposes, and include products such as Atkins, Slim-Fast, and Zone Bars. They are usually portion controlled or nutrient specific for consumer diet needs.

RTD/Powdered meal replacements are nutritional drink that are packaged ready-to-drink beverages and shakes or powders that can be added to milk or water designed to replace or supplement a meal. RTD meal replacements include items like Ensure, Glucerna, Boost, Slim-Fast and EAS Carb Control and powdered meal replacements include products such as Carnation Instant Breakfast.

Candy bars, cereal/breakfast bars, granola bars, and performance/athletic bars are not included in the scope of this report. Also excluded are cake bars, nut-based confectionery bars, trail mixes, and crackers. Products that are marketed as medical food and drink, and sold at retail, are not included in this report, with the exception of Glucerna, since the product's mix, labeling, and marketing reflect traditional meal replacements rather than medical products.

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