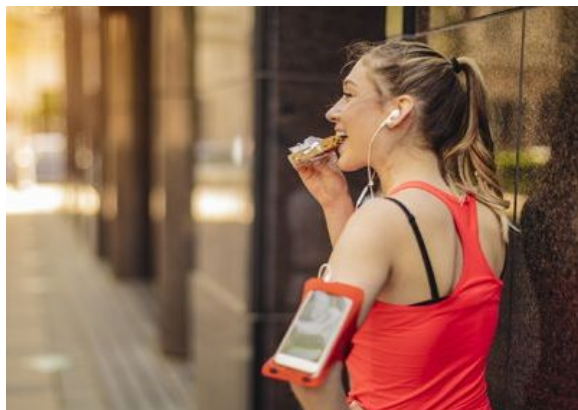


Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Consumer interest in convenient food options and an effort to adopt healthier lifestyles have supported category growth. While the likely continuation of these trends is an advantage to bar players, the subsequent growth in other food and drink categories stepping in to meet these needs presents a challenge. Year-over-year gains in the category are predicted to slow."

- Beth Bloom, Associate Director - Food & Drink

This report looks at the following areas:

- Bars continue steady year-over-year growth, slowdown in sight
- Omnipresence of snacking can challenge snack categories
- Sugar content down across the board

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

Bars continue steady year-over-year growth, slowdown in sight

Figure 1: Total US sales and fan chart forecast of snack, nutrition, and performance bars, at current prices, 2013-23

Omnipresence of snacking can challenge snack categories

Figure 2: Percentage growth in select snack categories, 2012-17

Sugar content down across the board

Figure 3: Bar launches, by average sugar total, 2014-18

The opportunities

Daily bar eaters do so for function

Figure 4: Reasons for bar consumption, by consumption frequency, December 2018

Protein amount drives bar choice, for now

Figure 5: Attributes of interest, February 2018 and December 2018

It's OK to move beyond protein

Figure 6: Holistic health approach, November 2018

What it means

The Market – What You Need to Know

Bars continue steady year-over-year growth, slowdown in sight

Snack and nutrition bars continue to gain share

Ubiquitous snacking can challenge snack categories

Portability is a strength, room for flavor improvement remains

Aging population should put the bar category on alert

Market Size and Forecast

Bars continue steady year-over-year growth, slowdown in sight

Figure 7: Total US sales and fan chart forecast of snack, nutrition, and performance bars, at current prices, 2013-23

Figure 8: Total US retail sales and forecast of snack, nutrition, and performance bars, at current prices, 2013-23

Figure 9: Total US retail sales and forecast of snack, nutrition, and performance bars, at inflation-adjusted prices, 2013-23

Market Breakdown

Snack and nutrition bars continue to gain share

Figure 10: Total US retail sales of snack, nutrition, and performance bars, by segment share, 2016 and 2018 (est)

Figure 11: Total US retail sales of snack, nutrition, and performance bars, by segment, 2013-23 (fore)

“Other” retail channels dominate bar sales

Figure 12: Total US retail sales of snack, nutrition, and performance bars, by channel, at current prices, 2013-18 (est)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Market Perspective

The snack landscape continues to grow crowded

Figure 13: Percentage growth in select snack categories, 2012-17

Figure 14: Snack purchase drivers, November 2018

Snack bars perform well for portability, portion control, and satiety

Figure 15: Correspondence Analysis – Symmetrical map – Perception of snacks, December 2018

Figure 16: Perception of snacks, December 2018

Nutrition bars excel for portability, time savings

Figure 17: Correspondence analysis – Symmetrical map – Perception of nutrition products, December 2018

Figure 18: Perception of nutrition products, December 2018

Performance bars seen as time-savers and good before workouts

Figure 19: Correspondence analysis – Symmetrical map – Perception of performance products, December 2018

Figure 20: Perception of performance products, December 2018

Market Factors

Snack frequency increasing

Figure 21: Snacking frequency, January 2015 and November 2018

Aging population should put the bar category on alert

Figure 22: Population by age, 2013-23

Nutritional focus will have a wider reach than athletic performance

Figure 23: Fitness/health engagement, December 2018

Figure 24: Fitness activities participation, December 2018

Key Players – What You Need to Know

Big brands score points with consumers

Performance bars may be pricing themselves out of the general market

Protein content continues to rise

It's OK to move beyond protein

Company and Brand Sales of Snack, Nutrition, and Performance Bars

The big three controls nearly 60% of MULO sales of bars

Figure 25: Multi-outlet sales of snack, nutrition, and performance bars, by leading companies share, 52 weeks ending November 4, 2018

Figure 26: Multi-outlet sales of snack, nutrition, and performance bars, by leading companies, rolling 52 weeks 2017 and 2018

What's Working?

Big brands score points with consumers

Lärabar gains keep General Mills in the positive

Figure 27: Multi-outlet sales of snack bars, by leading companies and brands, rolling 52 weeks 2017 and 2018

RXBar posts strong MULO gains

Figure 28: Multi-outlet sales of nutrition bars, by leading companies and brands, rolling 52 weeks 2017 and 2018

Atkins is on the rise in MULO

Figure 29: Multi-outlet sales of weight loss bars, by leading companies and brands, rolling 52 weeks 2017 and 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Crunchy and chewy textures lead introductions

Figure 30: Bar launches, by texture share, 2014-18

Flavor innovation finally moves beyond traditional chocolate

Figure 31: Bar launches, by flavor share, 2014-18

Gluten free claims keep growing

Figure 32: Bar launches, by claim share, 2014-18

Protein totals continue to rise

Figure 33: Bar launches, by average protein total, 2014-18

Pea protein, please

Figure 34: Bar launches, by protein type share, 2014-18

Chilled launches on the rise among growing segments

Figure 35: Bar launches, by storage, 2014-18

What's Struggling?

Performance bars may be pricing themselves out the general market

Figure 36: Multi-outlet sales of performance bars, by leading companies and brands, rolling 52 weeks 2017 and 2018

Total sugar content down across the board

Figure 37: Bar launches, by average sugar total, 2014-18

Use of white sugar is in decline

Figure 38: Bar launches, by sugar/sweetener type share, 2014-18

What's Next?

Downsizing

Bars for any age

Figure 39: Fitness/health engagement, by age, December 2018

Moving beyond protein

Figure 40: Holistic health approach, November 2018

The Consumer – What You Need to Know

More than two thirds of US adults eat bars

Bars are primarily snacks

Protein amount drives bar choice

Close to half of bar eaters look for between 5-14g of protein

Half of bar eaters want bars with less than 9g sugar

Bar Consumption

More than two thirds of US adults eat bars

Figure 41: Bar consumption, December 2018

A third of consumers are eating two or more bar types

Figure 42: Bar consumption – Repertoire, December 2018

Men make up the lion's share of performance bar eaters

Figure 43: Share of bar consumption, by gender, December 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The majority of bar eaters are under age 45

Figure 44: Share of bar consumption, by age, December 2018

Younger consumers try multiple bar types

Figure 45: Bar consumption – Repertoire, by age, December 2018

Three quarters of Hispanic consumers eat bars

Figure 46: Bar consumption, by Hispanic origin, December 2018

Performance bars may be cost prohibitive

Figure 47: Share of bar consumption, by household income, December 2018

Granola bars lead consumption

Figure 48: Types of bars consumed, by age group, 2018

Bar consumption is down among kids and teens

Figure 49: Kids (age 6-11) cereal bar consumption, 2014-18

Figure 50: Teen (age 12-17) bar consumption, 2014-18

Reasons for Bar Consumption

Bars are primarily snacks

Figure 51: Reasons for bar consumption, December 2018

Daily bar eaters do so for function

Figure 52: Reasons for bar consumption, by consumption frequency, December 2018

Performance bar eaters looking for function

Figure 53: Reasons for bar consumption, by bar type, December 2018

Men are more likely to turn to bars for function

Figure 54: Reasons for bar consumption, by gender, December 2018

Younger eaters want more from their bars than satiety

Figure 55: Reasons for bar consumption, by age, December 2018

Bar Attributes of Interest

Protein amount drives bar choice, for now

Figure 56: Attributes of interest, December 2018

Figure 57: Attributes of interest, February 2018 and December 2018

Price and sugar may be barriers to more frequent consumption

Figure 58: Attributes of interest, by consumption frequency, December 2018

Performance bar eaters are particularly interested in protein

Figure 59: Attributes of interest, by bar type, December 2018

Men are more likely to focus on protein, women look at price and sugar

Figure 60: Attributes of interest, by gender, December 2018

Sugar is top of mind for older consumers

Figure 61: Attributes of interest, by age, December 2018

Hispanic respondents pay particular attention to protein source

Figure 62: Attributes of interest, by Hispanic origin, December 2018

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Protein Amount

Close to half of bar eaters look for moderate protein amounts

Figure 63: Protein amount, December 2018

More than a third of performance bar eaters look for bars with 15g+ protein

Figure 64: Protein amount, by bar type, December 2018

Figure 65: Protein amount, by fitness engagement, December 2018

Meal replacers pay closer attention to protein

Figure 66: Protein amount, by occasions, December 2018

A third of women don't pay attention to protein amount

Figure 67: Protein amount, by gender, December 2018

Younger consumers are more likely to pay attention to protein amount

Figure 68: Protein amount, by age, December 2018

Sugar Amount

Half of bar eaters want bars with less than 9g sugar

Figure 69: Sugar amount, December 2018

Performance bar eaters pay attention to sugar

Figure 70: Sugar amount, by bar type, December 2018

Older bar eaters are most interested in low sugar amounts

Figure 71: Sugar amount, by age, December 2018

Mintel Food/Drink Consumer Segmentation

Figure 72: Food/drink shopper segmentation, December 2018

Quality Seekers (37%)

Figure 73: Profile of Quality Seekers, December 2018

Adventure Eaters (32%)

Figure 74: Profile of Adventure Eaters, December 2018

Time Savers (17%)

Figure 75: Profile of Time Savers, December 2018

Value Chasers (15%)

Figure 76: Value Chasers, December 2018

Implications of food/drink consumer segments on the snack, nutrition, and performance bar category

The bar category is built for Time Savers

Figure 77: Reasons for bar consumption, by food/drink consumer segmentation, December 2018

Quality Seekers could be swayed by a focus on ingredients

Figure 78: Attributes of interest, by food/drink shopper segmentation, December 2018

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Snack, Nutrition and Performance Bars - US - February 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumer survey data

Correspondence analysis methodology

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 79: Total US retail sales and forecast of snack bars, at current prices, 2013-23

Figure 80: Total US retail sales and forecast of snack bars, at inflation-adjusted prices, 2013-23

Figure 81: Total US retail sales and forecast of nutrition bars, at current prices, 2013-23

Figure 82: Total US retail sales and forecast of nutrition bars, at inflation-adjusted prices, 2013-23

Figure 83: Total US retail sales and forecast of performance bars, at current prices, 2013-23

Figure 84: Total US retail sales and forecast of performance bars, at inflation-adjusted prices, 2013-23

Figure 85: Total US retail sales and forecast of weight loss bars, at current prices, 2013-23

Figure 86: Total US retail sales and forecast of weight loss bars, at inflation-adjusted prices, 2013-23

Figure 87: US supermarket sales of snack, nutrition, and performance bars, at current prices, 2013-18

Figure 88: US drugstore sales of snack, nutrition, and performance bars, at current prices, 2013-18

Figure 89: US sales of snack, nutrition, and performance bars through other retail channels, at current prices, 2013-18

Appendix – Key Players

Figure 90: Multi-outlet sales of snack, nutrition, and performance bars, by leading companies, rolling 52 weeks 2017 and 2018

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com