

Trending Flavors and Ingredients in Snacks - US - February 2020

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.



"This Report examines flavor and ingredient trends in the salty snack category, taking a "now, near, next" approach to identify current and future product trends – all based on consumer data."

- **Mimi Bonnett, Director - Food and Drink, Foodservice**

This report looks at the following areas:

- In a crowded snack aisle, let flavor be the difference
- Fickle snackers ripe for experimentation
- Next level interests point to consumers looking beyond "basic" innovation
- The future is flavorful

**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

Trending Flavors and Ingredients in Snacks - US - February 2020

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

Market overview

Top takeaways

Figure 1: Snack attitudes -- Health, November 2018

Fickle snackers ripe for experimentation

Mainstream innovation must leverage familiar flavors for mass appeal

Next level interests point to consumers looking beyond "basic" innovation

Figure 4: Snack flavor experience and interest, tier two flavors, November 2019

The future is flavorful

Figure 5: Snack flavor experience and interest, tier three flavors, November 2019

Source: Lightspeed/Mintel

Market Landscape – What You Need to Know

Snack growth continues unabated

Snack growth comes with movement into healthier options

Flavor innovation drives snack choice

Alternative snacks ramp up to target younger consumers

Flavor & ingredient innovation can propel growth

State of the Market

Strong overall snack sales growth

Figure 6: Total US retail sales of salty snacks, by segment, at current prices, 2014 and 2019 (est)

Innovation is leaning into BFY format

Figure 7: Product launches by snack segment, change in percent of total launches 2018-2019

With consumers, traditional offerings still dominate, yet niche snacks gain steam

Figure 8: Snack Consumption, November 2019

Young (foodies) are the catalyst of snack change

Figure 9: Generational profile of snack eaters, by snack type, indexed against all respondents, November 2019

Meat snacks enjoy strong growth

Flavorful innovation in meat snacks

Flavorful pork rind snack innovation

Alternative chips appeal to younger consumers

Alternative chips feature cutting-edge flavors

There's a lot of territory to explore...

Mintel Trend Drivers – Mapping the Catalyst of Change

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

Trending Flavors and Ingredients in Snacks - US - February 2020

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.

In snacks, flavor is a must

Figure 11: Snack choice drivers, November 2018

Younger consumers driving the shift to less traditional snacks

Wellness increasingly drives snacking habits

Figure 13: Snack Behaviors, Health, November 2018

Flavor = excitement

Flavor innovation in pretzels

Brand Landscape – What You Need to Know

Legacy brands and disruptors feed each other

Snack innovation should be rooted experience with some healthy nods

Now: New takes on classic favorites

Next: International influence crosses new snack borders

Pipeline: Future flavors will rely on connections

Brand Landscape

Same goal, different approach

A tale of two types of snack brands

Figure 14: US: Instant reaction and purchase intent, new snacks from top disruptors vs new snacks from top mainstream brands, Jan 2017 to Dec 2019

Figure 15: US: Attribute perceptions, new snack launches from disruptors vs new snacks from top mainstream brands, Jan 2017 to Dec 2019

Product Development: Now – Current Snack Flavor Trends

The mainstream is getting peppered with diversity

Figure 16: Preferred snack flavor types November 2019

Spicy and sour flavors meet in the middle to deliver experience

Figure 17: Percent change in snack launches with spicy/sour flavors, 2018-2019

Figure 18: US: Instant reaction & purchase intent for snacks with spicy and sour flavors, 2017-2019

Brands in action

Herbs

Figure 19: Percent change in snack launches with herbal flavor component, 2018-2019

Brands in action

Some consumers shy away from grain ingredients for wellbeing

Figure 20: Categories where free-from claims are sought, April 2019

Brands in action

Rising Asiago cheese flavor provides pleasure and adventure

Figure 210: Purchase intelligence scores, Cheese snacks versus other flavor snacks, January 2019

Figure 22: Cheese varietal growth on menus, % change Q2 2016 to Q2 2019

Brands in action

Everything bagel flavor revels in social buzz

Brands in action

Product Development: Near – What to Watch for Tomorrow

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

Trending Flavors and Ingredients in Snacks - US - February 2020

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.

Seaweed snacks connect to multiple consumer trends

Figure 23: Snack attitudes, ingredient scrutiny and ethics, August 2019

Figure 24: International food consumption – net any consumption, Asian cuisines, November 2017-November 2018

Brands in action

Indian influence rises as snacks leverage adventurous taste experiences

Brands in action

Popped water lily seeds leverage nutritional punch

Brands in action

Lemongrass delivers adventurous Southeast Asian tastes

Figure 26: Growth of US menu instances of lemongrass, Q4 2015-2019

Brands in action

Product Development: Next – What’s in the Pipeline

The free-from brand

Brands in action

Chimichurri provides bold Argentinian experiences

Brands in action

Za’atar brings exotic experiences to snacks

Figure 27: US menu instances of za’atar, percent change Q3 2015-Q3 2019

Brands in action

The Consumer – What You Need to Know

Spoiler alert: young foodies love bold international flavors

Preferred flavors are increasingly influenced by social media

Emerging flavors face familiarity challenges

Consumers enjoy experimenting with flavors...to a point

Snack Flavor Attitudes

Snacks are a platform for new flavor discovery

Figure 28: Snack flavor attitudes, November 2019

Younger women are following flavor trends online

Figure 29: Snack attitudes, % of snackers, by generation, November 2019

Figure 30: Snack attitudes, by gender and age, November 2019

Consumer segmentation by snack attitudes

Entrée-inspired snacks become viral hits with Social Followers

Figure 31: Preferred snack flavors, by snack attitudes, November 2019

Preferred Snack Flavor Families

Some like it hot, but not as much as sweet

Figure 32: Preferred snack flavors, November 2019

Flavor pairings interest younger snackers

Figure 33: Preferred snack flavors, % of respondents, by gender and age, November 2019

**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

Trending Flavors and Ingredients in Snacks - US - February 2020

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.

Now: Primary Snack Flavors Consumed

Most frequently consumed flavors led by barbecue

Figure 34: Snack flavors consumed, November 2019

Optimal snack flavor lineup banks on the familiar

Figure 35: TURF Analysis – snack flavors consumed, November 2019

Tangy flavors interest Hispanic consumers

Figure 36: Snack flavors consumed, % of snackers, by race/ethnicity, November 2019

Near: Snack Flavor Experience and Interest

Trial and level of interest suggest that consumers are looking beyond “basic” innovation

Figure 37: Snack flavor experience and interest, tier two flavors, November 2019

Figure 38: Snack flavor experience and interest, tier two flavors, Net any interest, November 2019

Net flavor score defined

Herbal flavors garner universal interest

Figure 39: Snack flavor interest, tier two, net flavor score, November 2019

Millennials want it all but don’t neglect Gen X

Figure 40: Snack flavor interest, tier two flavors, net flavor score, by generation, November 2019

Figure 41: Blue Diamond almond flavor innovation appeals to specific consumer segments

Next: Snack Flavor Experience and Interest

Interest levels indicate education is needed for tier three flavors

Figure 42: Snack flavor experience and interest, tier three flavors, November 2019

Source: Lightspeed/Mintel

Net flavor score defined

Flavors of the future will be social

Figure 43: Snack flavor interest, net flavor score, by snack attitudes, November 2019

Lack of familiarity holds emerging flavors back

Figure 45: US: Attribute perceptions, snack launches with emerging flavors vs snacks with established flavors, Jan 2017 to Dec 2019

Figure 46: Emerging snack flavor interest, net flavor score, November 2019

Asian and Hispanic consumers open to new flavor experiences

Figure 47: Snack flavor interest, tier three flavors, net flavor score, by race/ethnicity, November 2019

Snack Flavors by the Mintel Food and Drink Consumer Segmentation

Figure 48: Snack flavor interest, tier two, net flavor score, by food and drink shopper segmentation, November 2019

Premium private label can act as a gateway to new flavors

Figure 49: Emerging snack flavor interest, tier three, net flavor score, by food and drink shopper segmentation, November 2019

Premium private label snacks with cutting-edge snack flavors

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

**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

Trending Flavors and Ingredients in Snacks - US - February 2020

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.

Purchase Intelligence

Mintel Menu Insights

Mintel Food and Drink Shopper Segmentation

Abbreviations and terms

Abbreviations

Terms

Appendix – The Consumer

Consumer segmentation by snack attitudes

Figure 50: Demographic profile of snack eaters, by snack type, indexed against all respondents, November 2019

Appendix – The Market

Figure 51: Total US retail sales of salty snacks, by segment, at current prices, 2014 and 2019 (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