"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

DID YOU KNOW?

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

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In snacks, flavor is a must

Younger consumers driving the shift to less traditional snacks
Wellness increasingly drives snacking habits

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

Product Development: Now – Current Snack Flavor Trends

The mainstream is getting peppered with diversity

Spicy and sour flavors meet in the middle to deliver experience

Brands in action

Herbs

Brands in action

Some consumers shy away from grain ingredients for wellbeing

Brands in action

Rising Asiago cheese flavor provides pleasure and adventure

Brands in action

Everything bagel flavor revels in social buzz

Brands in action

Product Development: Near – What to Watch for Tomorrow
Seaweed snacks connect to multiple consumer trends

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

Brands in action
Chimichurri provides bold Argentinian experiences
Brands in action
Za’atar brings exotic experiences to snacks

Brands in action
The free-from brand

Preferred flavors are increasingly influenced by social media
Emerging flavors face familiarity challenges
Consumers enjoy experimenting with flavors…to a point

Snacks are a platform for new flavor discovery

Younger women are following flavor trends online

Consumer segmentation by snack attitudes
Entrée-inspired snacks become viral hits with Social Followers

Preferred Snack Flavor Families

Some like it hot, but not as much as sweet

Flavor pairings interest younger snackers
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Optimal snack flavor lineup banks on the familiar
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Source: Lightspeed/Mintel
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Trending Flavors and Ingredients in Snacks - US - February 2020

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Mintel Menu Insights
Mintel Food and Drink Shopper Segmentation
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Abbreviations
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Consumer segmentation by snack attitudes
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Appendix – The Market

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

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