Forward Thinking: The Rise of Snacking

With consumers snacking at all times of the day and demanding a range of products to match their lifestyle, brands and manufacturers are responding in kind with bold, culinary-inspired flavors in a variety of bases such as meat, poultry, fish and plant-based ingredients.

According to Citi Research and Euromonitor*, the global snack market was worth $406 billion in 2018, and salty snacks were worth $83 billion with a 14% share of the global snack market. According to Mintel’s Global New Products Database (GNPD)b, China is the leader of salty snack innovation with 11% of the world’s salty snack product launches in 2018. The United States follows with 8%, India 7% and Indonesia and Japan each represent 5%.

According to data from the National Confectioners Association (NCA)c, U.S. retail sales of snacks were $51 billion in 2018 and were the second

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*c https://www.foodbusinessnews.net/articles/13901-top-trends-at-events-snacks-2019
largest consumable category. In addition, new products account for nearly 5% of sales in the snack category compared to about 3% of sales for overall consumer packaged goods. According to IRI\(^4\) for the 52 weeks ending Feb. 24, 2019, in the convenience store channel, total salty snacks sales reached $5.6 billion, a 5.4% rise over the previous year. Sales of potato chips reached more than $1.7 billion, up 2.6% while tortilla/tostada chip sales exceeded $1.1 billion, an increase of 11.6%, and pretzels recorded $245.1 million in sales, up 2.2%.

Consumers are snacking at all times of the day and looking for a variety of products to meet their lifestyle needs. Brands and manufacturers are capitalizing on this trend and meeting their evolving demands by offering a selection of bold, culinary-inspired flavors and a variety of bases such as meat, poultry and fish, as well as alternative plant-based ingredients and healthier preparation methods.

**Snack Attack**

In our hectic, fast-paced society, on-the-go lifestyles continue at a frenetic pace, and three-square meals a day are no longer viable. Consumer behaviors are rapidly evolving and they are changing their eating habits and snacking more often.

NPD found\(^5\) that Americans consumed nearly 386 billion of ready-to-eat snack foods in 2018, with the vast majority of those eaten between main meals. Additionally, snack food growth is happening mostly during the day with more snacking at meals and as meal replacements. According to IRI’s April 9, 2019 webinar titled “How America Eats 2019 State of Snack Industry,”\(^6\) 47% of consumers eat three plus snacks per day. Consumers are snacking all day long – 26% early morning, 36% morning, 66% afternoon, 57% evening and 40% late evening. Mintel’s data\(^7\) showed similar behavior and revealed that over half of respondents (52%) enjoy snacks between meals.

The Superbowl and summer gatherings are popular activities for individuals to consume salty snacks. Frito-Lay North America, the makers of Doritos, Cheetos and Tostitos, was the official sponsor of Super Bowl LIII and in Jan. 2019, the company unveiled its inaugural U.S. Snack Index. The Snack Index\(^8\) found that nine out of 10 viewers plan to have at least one snack during the game, and 80% of Americans will have potato chips or tortilla chips. In addition, nearly half of Gen Z and millennials selected cheesy snacks as a top pick followed by spicy snacks. Similarly, Frito-Lay North America released its summertime U.S. Snack Index in May 2019. The Snack Index\(^9\) revealed that nearly nine out of 10 Americans see snacking as important to summer occasions or cannot imagine summer without their favorite snacks. Additional results discovered that 92% of its respondents believe “convenience” is the most important factor for travel snackers, with 65% picking up single-serve packaging options.

**Flavor Focus**

Bold and savory culinary food trends and seasonal holiday flavors serve as inspiration for new snack introductions. According to Mintel\(^10\), 64% of U.S. salty snack eaters consider taste an important attribute. Furthermore, Mintel’s research showed that 41% of salty snack buyers like to try new kinds of salty snacks. Innova Market Insights’ research\(^11\) echoed this sentiment and when asked “Why have you increased your consumption of salty snacks?” one in three U.S. consumers have increased their consumption of salty snacks due to more variety and novelty being available.

Frito Lay’s launched **Flavor Shots**, a collection of chips that feature bold, intense flavors including Cheetos Flamin’ Hot Asteroids, Doritos Fiery Habanero Triangles, Doritos Nacho Cheese Nuts.

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\(^4\) https://cstorerecisions.com/2019/05/20/salty-snacks-get-hot-and-healthier/


\(^7\) https://www.preparedfoods.com/articles/123924-snack-trends-flavor-function-and-freshness-dominate

\(^8\) https://cstorerecisions.com/convenience-channel-players-bringing-their-game-big-time-


and **Doritos Flamin' Hot Nacho Cheese Nuts**. Conagra brand, Slim Jim debuted **Slim Jim Fire Fries**, which are flavored potato snacks in Buffalo Style and **Inferno** varieties that do not contain meat. **Bigs**, known for sunflower seeds, released a new product, **Crispy Fries** in Nacho Cheese and Ranch flavors while **Vlasic**, the pickle brand, launched **Fried Pickle Chips**. In honor of Rapper Cardi B, Rap Snacks dropped a **Cardi B** collection in four variants: **Cheddar BBQ Potato Chips**, **Habanero Hot Cheese Popcorn**, **Honey Drip Butter Popcorn** and **Jerk BBZ Potato Chips**. In addition, Rap Snacks created two **Migos** flavors: Bar-B-Quin With My Honey With A Dab Of Ranch Wavy Chips and **White Cheddar With A Dab Of Ranch Cheese Puffs**. Kettle Brand added **Wasabi Ranch Krinkle Cut Potato Chips** to its line, which “combines the creaminess of ranch dressing with the piquant heat of wasabi for an unexpected flavor fusion.”

**Pringles Wavy** joins the Pringles portfolio and features “a thick, wavy texture meant to deliver a bold crunch and big flavor in every bite.” The four flavors are inspired by grilling and include **Applewood Smoked Cheddar**, **Classic Salted**, **Fire Roasted Jalapeño** and **Sweet & Tangy BBQ**.

**Kettle Krave!** is a new snack brand that offers duo flavor combinations of premium sweet and salty kettle corn in one bag. The brand offers **Buffalo Wing/ Creamy Ranch**, **Honey/Barbecue** and **Maple/Bacon** flavors, with more varieties in the pipeline. A novel product is **All That & a Bag of Chips** ice cream by **Enlightened**, which highlights potato chip ice cream made with chocolate chips and a salted fudge swirl.

In the UK, Kettle Chips launched the **Kettle & More** range of chips that are seasoned and paired with food inclusions. The three varieties are: **Kettle & Apple Slices with Norfolk Pork Sausage seasoning**, **Kettle & Beetroot Slices with Goats’ Cheese & Caramelized Onion seasoning** and **Kettle & Sweet Potato Slices with Smoked Chipotle & Creme Fraiche seasoning**. According to the brand, these chips were designed “to engage the senses, to add vibrancy, texture and taste to the traditional crisp eating experience.”

Like other consumer packaged goods, snack brands are introducing limited-edition seasonal flavors for the holidays. For example, for Thanksgiving last year, **Trader Joe’s** released **Turkey & Stuffing Seasoned Kettle Chips**. In the UK, **Walkers** introduced a range of Christmas flavors including **Brussel Sprouts**, **Pigs in Blankets** and **Turkey & Stuffing**. Supermarket chain **Iceland** in the UK launched **Luxury Christmas Tree Flavored Salted Crisps** made with pine needle oil.

### The Big Cheese

Cheese is a popular and expected snack flavor. According to data from **IRI**, cheese snacks grew 5.9% to reach $2.3 billion for the 52 weeks ending Sept. 9, 2018. In the convenience store channel, cheese snack sales topped $742 million, a 7.1% gain from the previous year, for the 52 weeks ending Feb. 24, 2019, according to **IRI**.

**Cheez-It Snap’d** crackers join the Cheez-It line and are “designed to capitalize on two savory trends: light, crispy snacks and strong, bold flavors.” The products are made with real cheese and available in four flavors: **Cheddar Sour Cream & Onion**, **Double Cheese**, **Jalapeño Jack** and **White Cheddar & Bacon**. **Cheetos White Cheddar Bites** are a new product that feature “bite-sized tater tot-like corn pouches dusted with a white cheddar cheese powder.” **Combos** has added **Jalapeño Cheddar** to its range and the bite-size snack combines the “cheezy goodness” with a mix of spices.

**Imagine’s Cheese Stars** and **Yogurt Crisps** launched in late Oct. 2018 and were created to

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provide children better snacking options with nutrients, protein and calcium. The Cheese Stars highlight Parmesan and White Cheddar varieties and are non-GMO Project verified and do not contain artificial colors or flavors. ParmCrisps launched two new flavors: Cheddar and Sour Cream & Onion, which are oven-baked and gluten-free with low carbs, calories and sugar. In Japan, Calbee introduced Potato Chips Lovely Cheese, designed to appeal to women in their 20s and 30s. The new chips are a mixture of rich gouda and cream cheese with blueberry and are meant to pair with sparkling wine.

Where’s the Beef?

Fueled by Paleo and Whole30 lifestyles, there’s been an increased awareness of meat-based protein and a renewed interest in meat, chicken and pork snacks. In the 52 weeks ending Sept. 22, 2018, meat snack sales in convenience stores totaled over $1.5 billion, a 3.6% increase from the same period in 2017, according to Nielsen®. Mordor Intelligence research® expects the North America meat snacks market to record a CAGR of 7.2% between 2018-2023. The jerky industry is projected to generate $1.4 billion in revenue, up nearly 5% from 2015, according IBISWorld®.

According to Mintel’s data from 2017, 41% of consumers would like to see more meat snacks made from premium meat cuts; 28% of those polled found the idea of grass-fed meat snacks appealing, and 26% like the notion of preservative-free products. Furthermore, Jack Links’ 2018 Protein for Performance Study®, found that meat snacks meet growing consumer demand for high protein, on-the-go snacks, with 58% of shoppers citing protein as “very important” and 32% ranking it as “important.”

Le-Vel has released Thrive Bites, a range of single-serve beef snacks in three variants: Black Pepper & Sea Salt, Savory Garlic and Sweet & Spicy. The products are 98% fat-free and contain eight grams of protein per serving. Chomps added Chomplings, a smaller-size snack stick, scaled for smaller appetites. Offered in Original Beef and Original Turkey, the products are formulated with clean-sourced meats, are non-GMO, gluten-free, paleo and Whole30 approved. Foster Farms introduced Bold Bites, a line of refrigerated on-the-go chicken snacks. The fully cooked chicken breast pieces are available in five flavors: Cajun, Caribbean Jerk, Chile Verde, Korean BBQ and Parmesan Garlic and contain 15 grams of protein per serving.

Minneapolis-based Riffs Smokehouse has developed Bacon on the Go, a line of fully cooked, shelf-stable, thick-cut strips of bacon in five flavors: Habanero Heat, Hot Coffee, Raspberry Chipotle, Sweet and Spicy and Thai Curry. The ready-to-eat product can be microwaved for five seconds to create a "hot-off-the-smoker" taste and aroma. Hofmann Hunter Sticks added Prime Rib Beef Jerky to its lineup. The product is fully cooked, contains no fillers, no by-products or added MSG and are minimally processed and gluten-free. Pacific Gold Reserve added Jerky Trail Mix, Smoked Sausage Sticks and Cracked Peppercorn Turkey Jerky to its collection. The Jerky Trail Mix has a blend of fruits, nuts and seeds and is available in three flavors: Bourbon Glazed Beef Jerky with Cherries and Walnuts, Cracked Peppercorn Turkey Jerky with Dark Chocolate and Espresso Beans and Korean BBQ Pork Jerky with Mango and Papaya. The Sausage Sticks come in Sweet Italian, Original Smoked Recipe and Spicy Chorizo varieties. Chef’s Cut Real Jerky Co. launched Original and Spicy Chili biltong, which has no sugar and 26 grams of protein per bag.

Chorizo Bee & Pork, Hatch Chile Turkey, Maple Pork, and Pineapple Pork meat sticks join the Country Archer Jerky Co. meat stick line. The meat sticks are crafted with USDA-inspected 100% grass-fed beef, extra-lean antibiotic-free turkey and pork,
and are free of nitrates, MSG, gluten, antibiotics and added hormones.

Gone Rogue High Protein Chips by Land O’Frost Inc. “combines the crunchiness of a potato chip with the protein-rich benefits of jerky.” There are four varieties available: BBQ Flavored Chicken, Buffalo Style Chicken, Chicken Bacon and Chicken Teriyaki and each serving contains 17 grams of protein. DNX Foods launched a high protein Peri-Peri Chicken bar, which is shelf-stable for a year and is non-GMO, free of gluten, soy, MSG and dairy. In addition, the bar is Whole30 approved, Paleo and Keto compliant and contains 13 grams of protein. Dietz & Watson debuted Dietz Nuts, the first-ever “meat nut” snack, which features protein-packed, savory sausage bites.

Fish Out of Water

Fish jerky is an alternative to meat, pork and poultry and is an emerging snack. Fishpeople produce salmon jerky made from whole strips of sustainably harvested wild Alaskan keta salmon in four varieties: Ancho Chili+Lime, Lemon Zest+Herb, Rainbow Peppercorn and Sweet+Smoky Original. The jerky boasts 24 grams of protein and 900 milligrams of Omega 3. OneForNeptune crafts wild-caught whitefish jerky in three flavors: Fiery Cajun, Honey Lemon Ginger and Smoked Sea Salt & Juniper. The products are made from premium quality sustainable seafood and are gluten-free, free of preservatives (including nitrates), dairy-free and non-GMO.

Snacks on Tap

The craft beer culture continues to rise and has been spilling into the snack category. According to the Brewers Association¹, craft beer sales continue to grow and account for 24% of the total $114 billion U.S. beer market.

Inspired by craft brewing, Brewhouse Legends Snack Nut Mixes created three pub-inspired flavors: Hoppin’ Chili, Hops and Pepper and Michelada. Cape Cod and Samuel Adams Brewery partnered on the launch of the limited-edition Cape Cod Summer Potato Chips. The Cracked Pepper & Lemon flavor potato chips were created to accompany the citrus fruit notes of Sam Adams New England IPA. UK brand Noisy Nuts was developed as an artisan peanut kit with flavored seasonings to pair with craft beers. Noisy Nuts are available in five variants: Bacon Jalapeno (pairs with porter), Chilli and Lime (pairs with IPA). Meaty Beef (pairs with stout). Pickled Onion (pairs with lager) and Thai Sweet Chilli (pairs with pale ale). In March 2019, as part of the Turn Up The Flavor campaign, Lay’s released limited-edition Kettle Cooked Classic Beer Cheese, which was inspired by classic rock.

Unique Pretzel Bakery, Inc. released the Original Sourdough Craft Beer Pretzel Rings that are formulated with real malted barley and hops and are non-GMO, vegan and kosher with no added preservatives or flavors. In Oct. 2018, Planters forayed into the craft beer market with the launch of Mr. IPA-Nut. The beer is brewed with Wakatu and citra hops and “has a unique citrus aroma with a hint of honey-roasted peanuts followed by a slightly salty finish.”

Snacks Get Healthy

According to Innova Market Insights¹, there was a 17% increase in the growth of snacks with a health claim in launches between 2013-2017 and a 22% rise in those with a nutritious claim. Launches with a protein claim grew at a 31% CAGR during the period while plant-based ingredients grew at a 44% CAGR.

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OneForNeptune crafts wild-caught whitefish jerky made from premium quality sustainable seafood. The products are gluten-free, free of preservatives (including nitrates), dairy-free and non-GMO and offered in three flavors: Fiery Cajun, Honey Lemon Ginger and Smoked Sea Salt & Juniper. Courtesy of OneForNeptune.
According to the "Hartman Group’s The Future of Snacking Study⁴," 80% of consumers are willing to pay more for snacks with health attributes.

**Full of Beans**

Legumes such as beans, chickpeas, peas and lentils are popular, healthful plant-based ingredients being used in a variety of snacks, many of which are vegan. Beanitos revamped its snack line with “a new recipe with lighter textured bean chips that are crispier, more flavorful and more nutritious.” The snacks are made from whole black, pinto or white beans, sourced from farmers in Nebraska, Michigan, North Dakota and Colorado. The Beanitos are available in three collections: Classics, Crunch and Dippers with 16 SKUs in flavors such as **Party At The Ranch White Bean Chips** (buttermilk, herbs, and roasted garlic), **Mac N’ Cheese Baked Bean Crunch**, **Red Hot Cajun White Bean Chips** and **Sweet Chili and Sour Cream White Bean Chips** (sweet onion, chili, and cream). Baked bean brand Bush’s introduced a portfolio of better-for-you snacks including bean chips and crisp-roasted chickpeas. The **Bean Chips** come in **Chili Lime**, **Sweet Mesquite** and **Sea Salt** flavors, while the **Crisp-Roasted Chickpeas** are available in **Cracked Pepper**, **Roasted Garlic** and **Sriracha Lime** varieties. **Biena Snacks** launched a new line of baked **Chickpea Puffs** with a new look and tagline. The updated line features **Aged White Cheddar**, **Blazin’ Hot** and **Vegan Ranch** flavors.

World Peas Brand **Peatos** added **Ranch** to its portfolio of plant-based snacks formulated with peas and lentils. Safe + Fair Food introduced **Pea Protein Chips** made with lentil flour and pea protein offered in three flavors: **Hickory BBQ**, **Sea Salt** and **Sweet Jalapeño**. The chips are certified gluten-free, non-GMO, kosher, cholesterol-free, vegetarian and free from artificial preservatives, high fructose corn syrup, MSG and trans-fat. **Honestly Veggie** released **Popper Duos**, which are made with green peas, red lentils or black beans and contain no artificial colors or flavors. Popper Duos are available in three flavors: **BBQ & Ranch**, **Mac & Cheese** and **Zesty Queso**. Liberty Trade released **Crunch Instinct Chips**, a line of vegan snacks in **Turnip**, **Pumpkin**, **Carrot** and **Beet** varieties. The chips are gluten and palm-oil-free and do not contain artificial flavors, preservatives or taste intensifiers. **FitJoy Himalayan Salt Grain Free Pretzels** are plant-based, gluten-free, dairy-free, non-GMO, corn-free and soy-free and made with cassava and chickpea flour.

**Springing Up Like Mushrooms**

In addition to legumes, mushrooms are springing up in snacks because of their meaty texture and nutritional value. Pig Out Chips are 100% plant-based using mushrooms like king trumpet and are offered in **Pigless Bacon Chips** and **Snacklins Cracklins without the Pork**. Variants include: **Cheddar**, **Chipotle**, **Kansas City BBQ** and **Original** U.S. mushroom grower South Mill Champs has launched Shrooms Snacks in four product lines: **Shrooms Crispy Mushrooms**, **Shrooms Mushroom Jerky**, **Shrooms Snack Bar** and **Shrooms Splits Jerky**. The products are nut-and-dairy-free, vegan, and kosher; and many varieties are gluten-free, non-GMO and kosher: Shrooms Crispy

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⁴ https://crunchy.com/crunchy-healthy-snacking-stores
Mushrooms are available in five flavors: Mesquite Barbeque, Original Portabella, Pizza, Sea Salt and Spicy Jalapeno, while Shrooms Mushroom Jerky come in three varieties: Honey Chipotle Shiitake, Original Portabella and Roasted Teriyaki Portabella. Shrooms Splits Jerky includes Berries+Portabella, Filet Mignon+Portabella, Peppered Beef+Portabella and Turkey+Portabella flavors and Shrooms Snack Bars come in Crispy Mushroom Chocolate Chunk and Crispy Mushroom Sweet & Savory variants.

What’s Poppin’?

Popped snacks are a healthy alternative to fried snacks. A variety of ingredients such as whole grain corn, water lily, lotus seeds and rice are being explored. Ready-to-eat popcorn/caramel corn reached $236.5 million, a 3.4% gain from last year for the 52 weeks ending Feb. 24, 2019, according to IRI.

Pop Zero is a gluten-free, vegan, whole grain popcorn line made with algae oil offered in four varieties: Chili Lime, Cinnamon Toast, Guilt-Free Cinema and Sea Salt. The products are free from cholesterol, preservatives, trans fat, GMOs and high-fructose corn syrup. Bohana debuted a line of snacks made from popped water lily seed in three flavors: Himalayan Pink Salt, Soulful Spice and Wild White Cheddar. Bohana was one of 10 brands chosen for PepsiCo Inc.’s Nutrition Greenhouse accelerator program, which invested $20,000 in grant funding and offered personalized mentorship. The products are formulated with all-natural, non-GMO ingredients and are low in calories and fat and each bag contains six grams of protein.

In the UK, Native Snacks introduced a plant-based snack line formulated with popped lotus seeds that are vegan, non-GMO and halal, as well as gluten-, sugar- and MSG-free. The snacks are available in Cheesy, Jalapeno & Kar Lime and Pink Salt & Black Pepper flavors. Kellogg’s UK unveiled Pringles Rice Fusion Chips and are said to have a lighter texture, with less saturated fat and less salt than traditional Pringles. Indian Tandoori Chicken Masala, Malaysian Red Curry and Peking Duck with Hoisin Sauce are the three flavors available. Also, in the UK, Danone introduced Marty’s, a new allergen-friendly line of snacks, which are free from eggs, peanut and gluten. The first product is Popped Chickpea Crisps available in three options: Barbecue, Cheese & Onion Ready and Salted.

Snacks on Demand

Consumers are eating snacks at all hours of the day. Convenience is a key factor in their busy lifestyles. To meet consumers’ demands, brands are creating unique delivery methods and incorporating technology to offer snacks when and where consumers want them.

For the 2019 Super Bowl, Reynolds Wrap designed the Reynolds Wrap Hunger Harness, which was dubbed as a “one-of-a-kind wearable snack pack [with] everything you need to go all four quarters plus the Halftime Show without taking a break.” The Baby Bjorn-like device was sold for only one day and featured a main thermal pouch, an integrated food tray, a thermal drink holder, an insulated dip holder and adjustable silver straps. Tokyo snack-maker Koike-ya Inc. created the One Hand brand, which “features a line of splintered potato chips and other snacks that can be consumed like a bottled drink.” The potato chips are pre-smashed to enable users to pour in their mouth, as they would the crumbs at the bottom of a bag. And for those consumers that want luxurious snacks, Koike-ya
Inc. collaborated with gold-leaf maker Hakuichi and crafted the **Pride Potato Kanazawa Gold Leaf Salt Chips**. The chips are laced with real gold leaf and through a special frying process, the chips are thoroughly coated.

Australian startup **Grabox** is similar to U.S. Cargo, which sells snacks through a cashless system for rideshare drivers who use their phones to scan a QR code to buy a snack. Self-described as an “in-car convenience store,” Grabox introduced a vending machine-like box that straps to a car’s center console. The company partnered with brands like Coca-Cola and Mars Wrigley and drivers earn $1 per transaction and 20% commission on the cost of all products sold. PepsiCo’s Hello Goodness brand collaborated with Robby Technologies to develop a self-driving snack robot. The University of the Pacific in Stockton, California is the test site for three **Snackbots** with plans to grow to five. Via the app, students can order snacks at any time of the day, which the bots will deliver to more than 50 locations across the campus. Three workers on campus restock the bots with Baked Lay’s, SunChips, Smartfood Delight, Lifewtr, Starbucks Cold Brew, Pure Leaf Tea and Bubly sparkling water.

**Snackification on the Rise**

Snackification is a global phenomenon that shows no signs of slowing down. According to Mintel®, a total of 69% of snackers believe that anything can be considered a snack. Consumers’ lifestyles continue to be hectic and their demand for convenience coupled with bold flavors and better-for-you snacks is not waning. Regardless of the food or beverage category, brands and manufacturers are vying for consumers’ attention and snacks are a key driver for growth. Inspiration from culinary food trends and seasonal holidays combined with new better-for-you ingredients, such as meat and plant-based applications will continue to drive innovation and create new opportunities and challenges for flavor suppliers and consumer packaged goods.