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Snack Bars February 2024



**For more information, please contact
Tree Top Ingredients at
1-800-367-6571**

Contributing Editor
Justine Olson, Senior Client Success Manager
Mid Market CPG, Mintel



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US lifestyles have rendered meals relative; snack bars and healthy snacks' versatility primes them to fit within today's definition and the next.

Mintel's Market Predictions

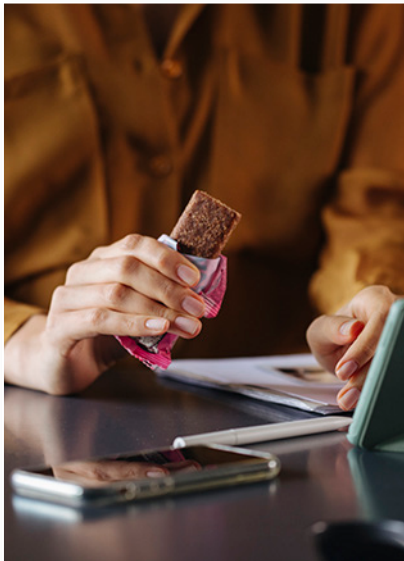
NOW 2024



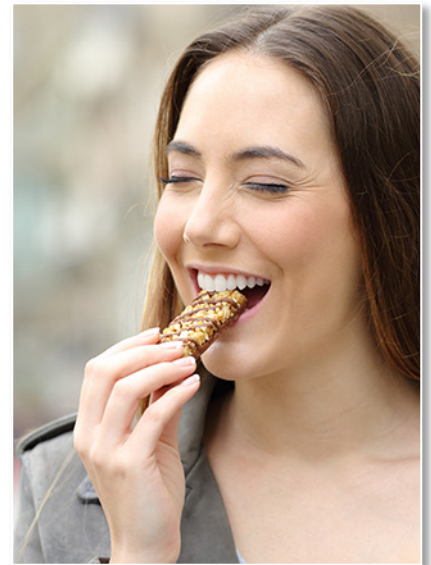
Following record inflation, consumers prove they would rather switch to private label or trade bar types than not engage with the category. Bar brands of all types are challenged to communicate value.

NEXT 2025-26

Consumers' lifestyles and external stressors may heighten the appeal of bars as convenient, concentrated hunger solutions. Continued innovation may also heighten the appeal of familiarity in the decision-making process.



FUTURE 2027-28

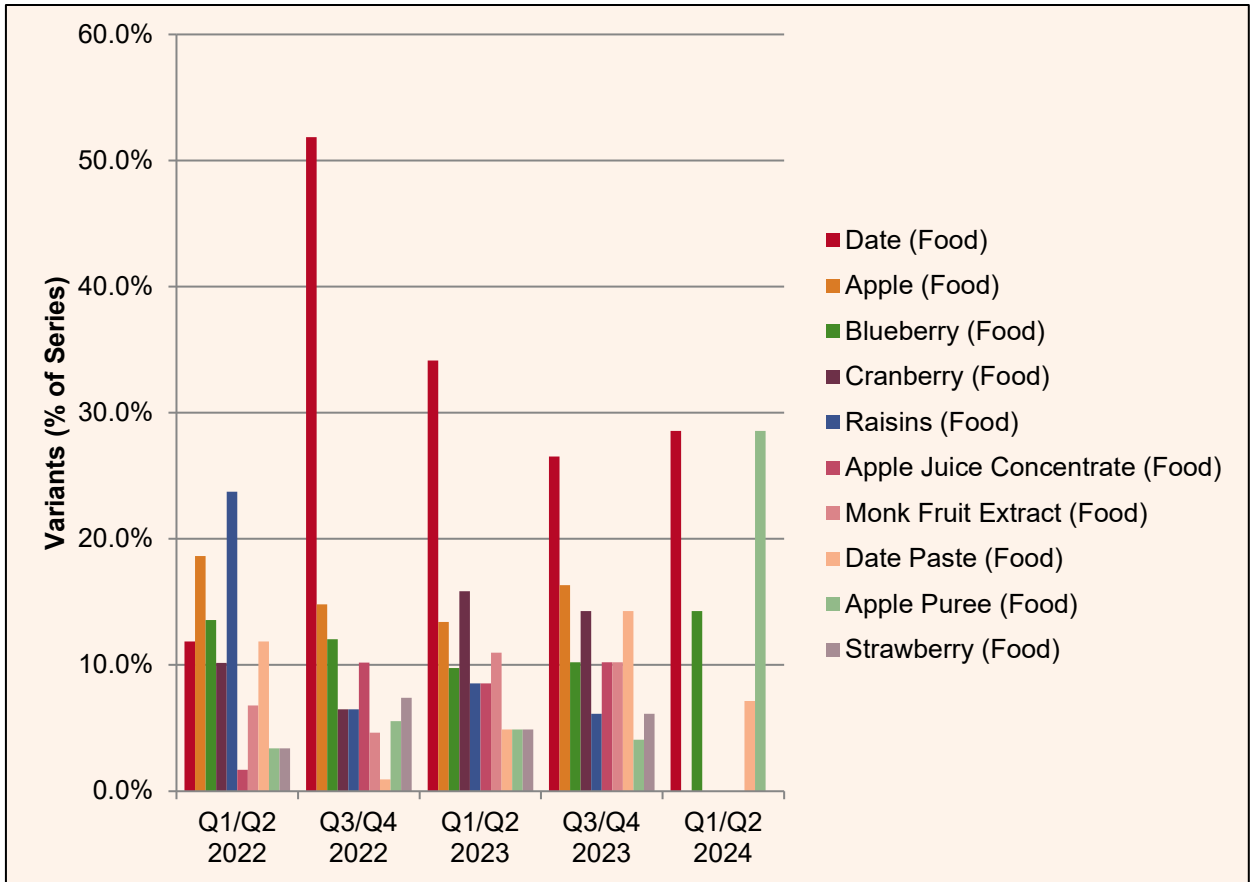


Format innovation challenges standard "bar" presentation and adds to the innovation mix. Further functional offerings heighten wellness appeal of select bars: though indulgent offerings will dive further into their differentiators, too.



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Top 10 Fruit Ingredients - Snack Bars



Nature Valley Fruit & Nut - Cranberry & Pomegranate Chewy Granola Bars



Naturally flavored - Made with real fruit - With almonds, cranberries and pomegranate

Kind Thins Caramel Apple Cinnamon Bars



A smooth caramel drizzle with the sweet taste of apple and cinnamon, rounded out by nuttiness



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Source: Mintel Global New Products Database (GNPD)





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The snack, nutrition and performance bar consumer: fast facts

- Consumers are widely engaged with bars (**78%**). Certain factors may change degree of engagement (parenthood) or bar type (finances), but the fact that financial comfort only changes type and not overall engagement says a lot about consumers' priorities.
- **Routines** impact frequency, seen in performance bars' higher daily consumption compared to other bars.
- At-home occasions lead for **adults** and **kids** – opening room for creativity that suits current meal and snacking habits.
- **Adults** want bars that are "real" and filling for themselves or other adults; **parents** want something their kids will eat.
- **Indulgence** still has a time and place, and can even be positioned as "better than" mindless binges within wellness definitions that save space for dessert.
- **Familiarity** is less intimidating and can be used to introduce new flavors and concepts.



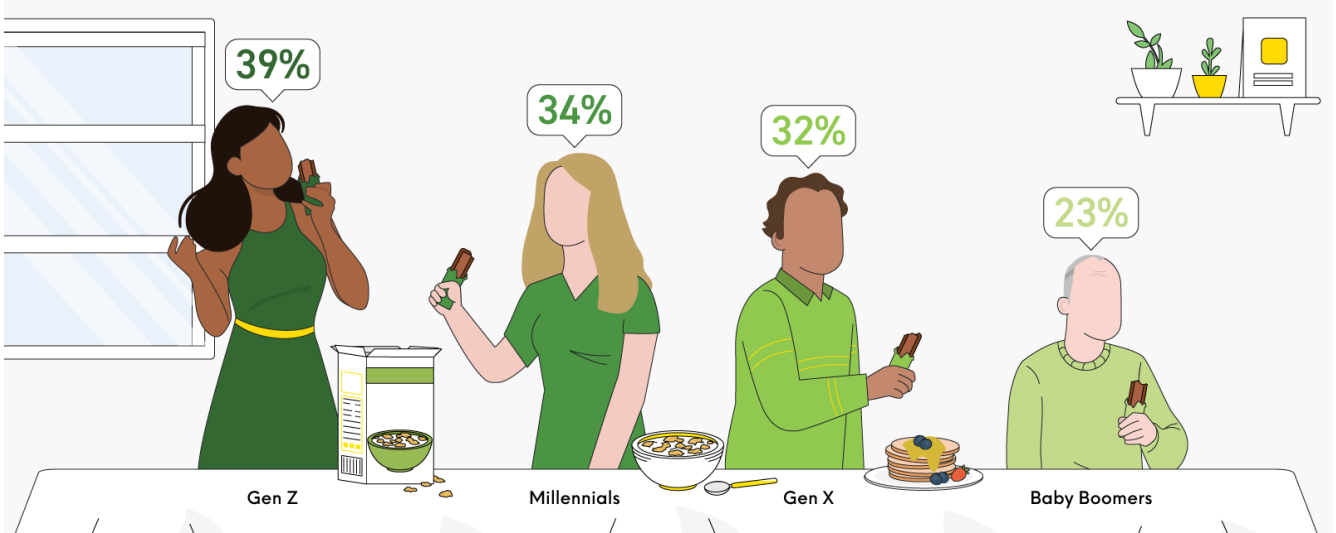


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Generational differences point to shifting snacking behaviors



US: adult bar occasions – as **breakfast**, % of respondents by generation, 2023



Base: 1,086 internet users aged 18+ who purchase bars for themselves or another adult in the household
 Source: Kantar Profiles/Mintel, October 2023



Kodiak - Cinnamon Oat & Apple Soft-Baked Sandwich Breakfast Bars

The product checks all the boxes for a better breakfast on the go - Crafted with 100% whole grains - 10 grams of protein - Soft oat + fruit filling - Fuel for any adventure



Atkins Soft Baked Energy Bar - Blueberry Protein Meal Bar

Full of protein - Limiting the amount of sugar and simple and refined carbs can help minimize spikes in blood sugar and provide steady energy - On the go - Keeps one satisfied at meal time - Chewy, crunchy, sweet and salty snack, anytime, anywhere - Fits into a low carb lifestyle



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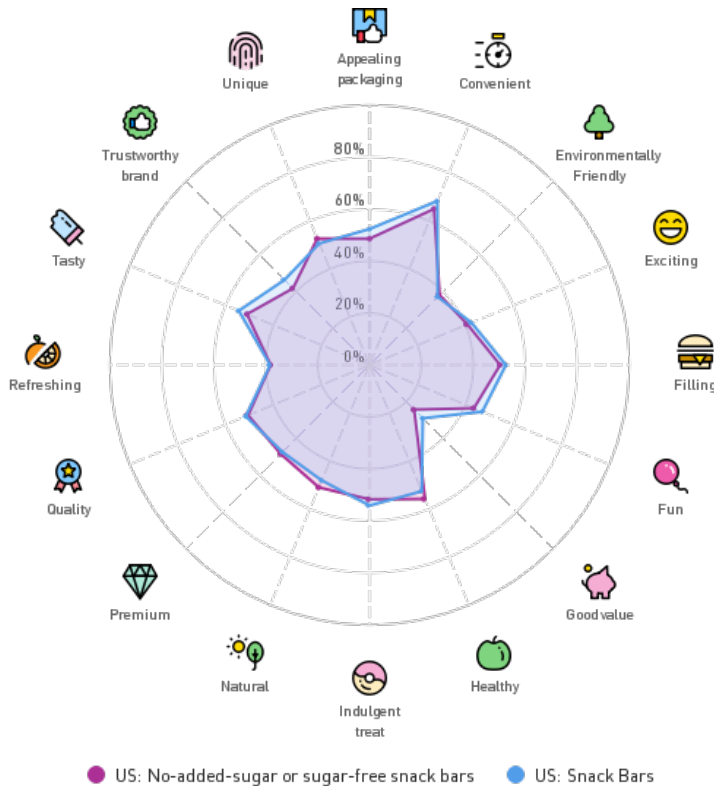
Finding the sweet spot for reduced-sugar bars is a challenge



Snack bars have long been plagued by consumers' concerns about high sugar content. Consumers rate low sugar content among the most important attributes they seek in snack bars. In the UK, 58% of snack bar consumers agree that bars targeted at children are too high in sugar.

The challenge is communicating the benefits of lower-sugar bars while maintaining the importance of great taste. As Mintel Purchase Intelligence shows, US consumers regard no-added-sugar or sugar-free products as less tasty than their full-sugar counterparts.

The 'war on sugar' has become more difficult. Brands need to navigate the complexities of consumer opinion on alternate sweeteners after the WHO announced that aspartame could possibly cause cancer in humans. Even other sweeteners like stevia are facing backlash.



Base: US internet consumers aged 18+ reviewing no-added-sugar or sugar-free snack bars 11,000; all snack bars 113,000 (September 2020-August 2023)
 Source: Mintel Purchase Intelligence



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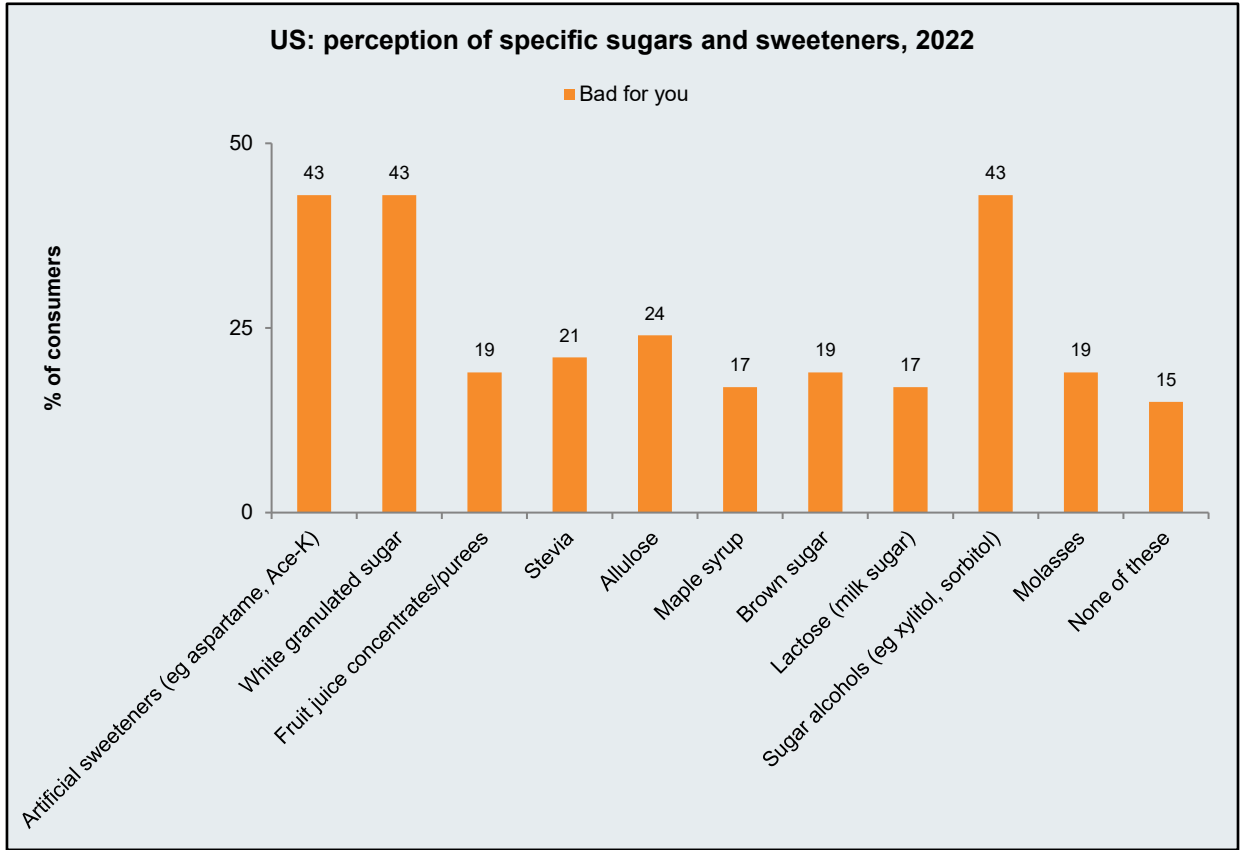
Source: Mintel Global New Products Database (GNPD)





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It's not just a war on sugar, it's a war on sweeteners



In addition to avoiding the perception of poor taste surrounding reduced-sugar products, brands must also consider the consumer backlash against some alternate sweeteners.

Artificial sweeteners (aspartame or Ace-K), sugar alcohols (mannitol, sorbitol, xylitol) and white sugar are all perceived as bad for you by the same percentage (43%) of consumers in the US.

In France, **only 22% of consumers** trust that the sweeteners used in food and drinks are safe.

The consumer perception of specific alternate sweeteners is leading brands to communicate the absence of them on pack.



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Source: Mintel Global New Products Database (GNPD)



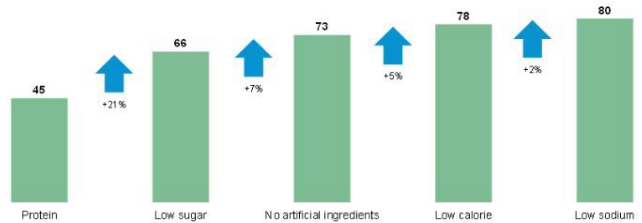


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Protein sets the stage; other attributes sweeten the deal (even without sugar)



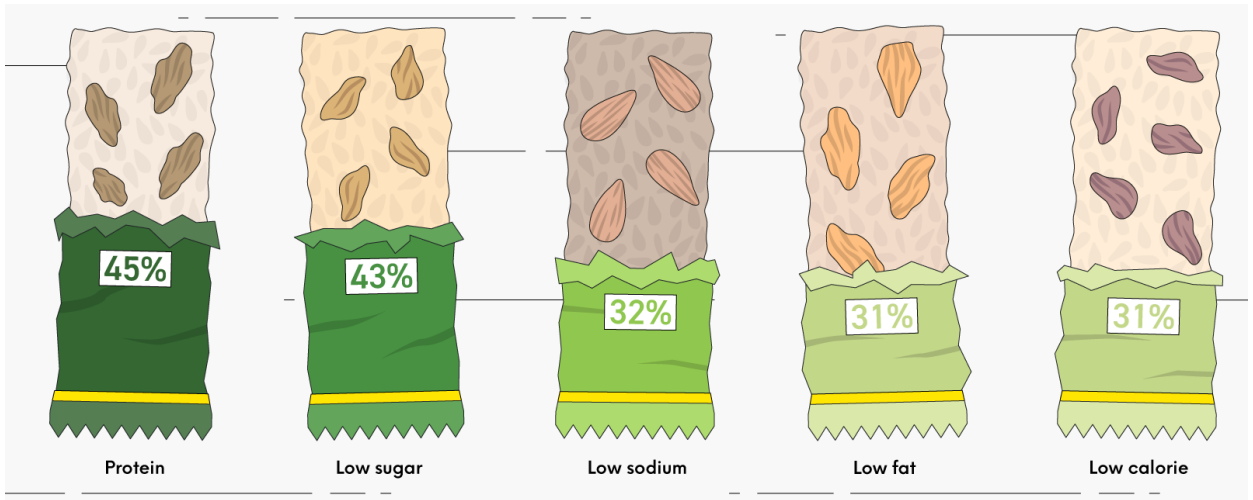
Whether its a singular snack, the product mix on a retailer's shelf or offerings within a brand portfolio, its the mix that matters. Stacking claims allows BFY snacks to reach more consumers by meeting more needs.



US: TURF analysis – important BFY snack features, 2024

Protein content and low sugar content are the most impactful features: a product with these two features alone would be appealing to around two-thirds of consumers who are considering a healthy snack.

Beyond that, niche brands can further engage the healthiest snackers with low/no claims, including low calorie and low sodium, but these specific claims are most likely to resonate with consumers with specific health needs (eg, hypertension).



US: protein is still the BFY darling, % of respondents, 2023

Base: 1,973 internet users aged 18+ who snack
Source: Kantar Profiles/Mintel, November 2023



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Source: Mintel Global New Products Database (GNPD)





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Think outside the bar (and flavor profiles)



Format innovations that retain the convenience and nutrition of traditional bars – with a twist – add an element of fun and snackability.



Evolve Habanero Mango Bark

Contains nutrient-dense "superfood" grains, seeds and adaptogens in a format that is less standard, yet still retains "bar" characteristics.

Thunderbird Mexican Hot Chocolate Superfood Bar

Contains less than 10 ingredients, with sweetness from dates and flavor from spices.

Upland Mango, Pineapple, Quinoa, Chia, Turmeric Freeze-Dried Bites

Offer immune-focused nutrition in a freeze-dried bar format.

