

BETTER FOR YOU SNACKING – US – 2024

As snacking replaces main meals, the BFY snack is critical to meeting nutritional needs. Despite a crowded market, consumers want ideas for BFY snacks that are easy, satiating, and delicious.



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Better For You Snacking - US - 2024

This report looks at the following areas:

- The profile of the typical snacker
- How often consumers are snacking – presently, and compared to last year
- What snacks are considered always healthy and sometimes healthy
- Sought after BFY snack features
- Interest in BFY snack innovations
- Snacking habits and related behaviors
- BFY snacking attitudes

Overview

Snacking continues to rise as a consumer behavior, and now its encroaching on meals. The shifts are led by Gen Z and Millennials, many of whom are at least in some way driven by parenthood: the shift in lifestyle subsequently adds more snacking to the mix. As society generally moves towards a more casual vibe, there is clear blurring between snacks and meals, creating space for BFY to step in as a nutritional solution. Protein content and low sugar are among the top consumer asks, likely because if a snack might replace a meal (or part of a meal), it should be nutritionally similar to more typical mealtime options.

Still, consumers don't necessarily want or need their BFY snacks to be nutritionally perfect; "too healthy" can actually be a red flag, signaling potentially disappointing taste. Small tweaks can protect the enjoyment of snacks while meeting needs related to health and wellness.



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Solving problems for consumers is always a winning strategy; when it comes to BFY snacks, the main problems revolve around planning for snack time and running out of BFY ideas. Help consumers build their snack "pantry" in a way that meets nutritional needs, satisfies cravings and balances the familiar with the exciting and interesting to become their brand of choice. **Consumers don't need inspiration *to* snack, they need inspiration on *how* to snack.**

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities
- Kodiak answers another call from busy consumers looking for BFY
- BFY claims will resonate more when produce is an ingredient
- Small swaps, big payoff

CONSUMER INSIGHTS

Consumer fast facts

Snacker profiles

- Snacking: a way of life
 - Graph 1: snacking frequency, 2023
- Snacking eases pressure for women
 - Graph 2: snacking frequency, by gender, 2023
- Snacking eases pressure for women
- BFY snacks let Gen Z feel good about their snacking habit
 - Graph 3: snacking frequency, by generation, 2023
- Snacks bridge the gap for lower income consumers
 - Graph 4: snacking frequency, by financial situation, 2023

Perceptions of healthy snacks

- The power of pairing snacks can cover a lot of sins
 - Graph 5: health perception of snacks, 2023
- Protein content wins the health halo, even if products have higher fat content
 - Graph 6: health perception of snacks, by generation – always healthy, 2023
- Moderation gains ground with financial struggles
 - Graph 7: health perception of snacks, by financial situation – healthy in moderation, 2023

Attributes of healthy snacks

- A tiered approach builds BFY the best
 - Graph 8: perception of healthy snack attributes, 2023
- A tiered approach builds BFY the best

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- What women (don't) want
 - Graph 9: features looked for when choosing a healthy snack, by gender, 2023
- Snack nutrition mirrors meals for generations snacking the most
 - Graph 10: features looked for when choosing a healthy snack, by generation, 2023
- Protein sets the stage; other attributes sweeten the deal (even without sugar)

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- Consumers aren't overthinking their snacking
 - Graph 11: important snack attributes, 2023
- Budgets may cause more stress than diet with kids
 - Graph 12: important snack attributes, by gender, 2023
- Older consumers get nostalgic with snacks
 - Graph 13: important snack attributes, by generation, 2023

Innovation interest

- BFY snack innovation should keep core snack attributes in mind
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- Reimagining competitive sets for BFY snacks allows meal replacement behavior to still meet nutritional needs
 - Graph 15: interest in snack innovation, by financial situation, 2023
- Snack solutions extend beyond product innovation
 - Graph 16: interest in snack innovation, by parental status, 2023

Snacking behaviors

- Variety (and reliability) spice up snacks
 - Graph 17: snacking behaviors, 2023
- Snacking evolves in more ways than one
 - Graph 18: snacking behaviors, by generation, 2023
- Help parents stay prepared
 - Graph 19: snacking behaviors, by parental status, 2023

Snacking attitudes

- BFY doesn't have to be good-for-you
 - Graph 20: snacking attitudes, 2023
- Snack's evolution includes more than satiety
 - Graph 21: snacking attitudes, by generation, 2023
- Parents will boost brands if brands help them first
 - Graph 22: snacking attitudes, by parental status, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Flavourscape AI
- Marshmallow crispy treats get a BFY makeover
- Cauliflower gets more than 15 minutes
- Putting vegetables front and center is a direct route to BFY
- Fruit forward snacks don't have to prove nutrition
- Sargento finds balance by partnering with Chips Ahoy brand
- Classic PB&J flavor makes a less common format feel familiar
- Eight superfoods is better than one
- Kodiak does it again

Marketing and advertising

- That's it gives tangible solutions to parents' problems
- Skinny Pop puts the pop culture in popcorn
- Build snacks from the ground up

Opportunities

- Brands have a role in innovation outside of product development
- Help consumers make a plan
- Ingredient spotlight: vegetables

THE MARKET

Market context

- Snack attacks are on the rise
 - Graph 23: changes in snacking in the last year, 2023
- Generation, parenthood drive increases in snacking
 - Graph 24: snacking more since last year, by various demographics, 2023
- Healthy eating efforts are a challenge BFY snacks can solve
 - Graph 25: efforts towards healthy eating, 2023

Market drivers

- Disposable income signals rooms for snacks
- Positive nutrition is trending, positively
- Eating BFY doesn't have to be hard (but right now, it is)
- Keeping it casual can create real value

APPENDIX

- Market definition
- Consumer research methodology
- Methodology: TURF analysis
- Generations
- Abbreviations and terms

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