

CHILDREN'S SNACKS – GERMANY – 2021

Parents' increased health focus due to COVID-19 necessitates further health-led innovation, for example, in snacks with lower sugar or with functional benefits.



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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Impact of COVID-19 on children's snacking

- COVID-19 outbreak boosts at-home snacking in 2020, and this will continue in 2021
- COVID-19's impact on children's snacking and German consumer behaviour

Market context

- COVID-19 outbreak boosts at-home snacking over 2020-21
- Snacking is near universal
 - Graph 1: types of snacks bought for children, by category, December 2020
- Falling birth rates and trend towards smaller families set a challenge for the category
 - Graph 2: live birth rates, 2015-19
- Many children are missing the mark on health

Mintel predicts

- Multiple factors for companies to consider in the wake of the pandemic

What consumers want, and why

- Consumers want: snacks with high fruit/vegetable content
- Consumers want: snacks with no added sugar
- Consumers want: more guidance on healthy snacks
 - Graph 3: parents who agree there is not enough guidance on which snacks are healthy for children, by age group, December 2020
- Consumers want: snacks with functional benefits

Opportunities

- Good opportunities for new snack launches
- Promote single-serve packs as helping to control children's nutritional intake
- Scope for expansion in plant-based children's snacks
- Quick download resources

MARKET DRIVERS

- A return to lockdown
- Rates of at-home eating to remain high in 2021
- Consumers' weakened finances to prompt trading down in 2021

Children's Snacks – Germany – 2021

- Graph 4: extent to which people are worried the COVID-19 outbreak might affect their lifestyle, by parental status, 4-17 March 2021
- Birth rate falls in 2019 and is expected to decline further in 2020
 - Graph 5: number of live births, 2015-19
- Develop snacks aimed at teenagers to retain users for longer
- Delayed motherhood trend is a barrier to volume sales growth
 - Graph 6: average age of mothers at birth of the first child (amongst married women), 1999-2019
- A fifth of 3-17 year olds are overweight
 - Graph 7: rates of obesity among children and adolescents, by age group, 2017
- Food industry is tasked with reducing fat, salt and sugar
- Government looks to regulate school meals
- Many children are missing out on their five-a-day
- The impact of COVID-19 on the German economy
 - Graph 8: key economic data, in real terms, 2019-22
- Brexit: some disruption for German trade will be inevitable

WHAT CONSUMERS WANT AND WHY

Impact of COVID-19 on consumer behaviour

- Parents' heightened health consciousness offers both a challenge and an opportunity
- Shift to online shopping provides scope for direct-to-consumer services
- Offer more locally sourced products to tap into the localism trend
 - Graph 9: consumers who agree that their local community has become a higher priority for them since the COVID-19 outbreak, by parental status, 2-12 February 2021
- Companies need to be proactive on sustainability
 - Graph 10: consumers who agree the environment has become a higher priority for them since the COVID-19 outbreak, by parental status, 2-12 February 2021

Types of snacks bought for children

- 97% of German parents buy snacks for their children
 - Graph 11: types of snacks bought for children, by category, December 2020
- Fresh fruit/vegetables are the most widely bought snack
 - Graph 12: types of snacks bought for children, December 2020
- Parents of 5-15s are most likely to buy snacks
 - Graph 13: types of snacks bought for children, by category, by age of the oldest child in the household, December 2020
- More scope for NPD in children's snacks

Frequency of snacking among children

- 90% of under-15s snack once a day or more

Children's Snacks – Germany – 2021

- Graph 14: frequency of snacking among children aged 0-15, December 2020

Where children snack

- Children mainly snack at home
 - Graph 15: where children snack, December 2020
- Focus more on school-time occasions to drive purchase
- Promote sharing bags for celebrating children's reunions with friends post-pandemic

Factors influencing parents' choice of snacks for children

- Focus on fruit/vegetable content to win over parents
- High fruit/vegetable content is the most sought-after attribute
 - Graph 16: factors influencing choice of snacks for children, December 2020
- Appeal to health-conscious parents with fruit/vegetable content on-pack
- Explore vegetable ingredients in crisps and sweet snacks
- International inspiration: fruit & vegetable blend yogurts
- Use packaging and novelty shapes to make vegetables more visually appealing for children
- International inspiration: children's vegetable snacks
- Children's preferences hold considerable sway
- Favourite brands have more of an influence as children get older
 - Graph 17: child's favourite brand as an influencing factor when choosing snacks for children, by age of oldest child, December 2020

Parents' behaviours relating to children's snacks

- Good opportunities for innovation in children's snacks
 - Graph 18: parents' behaviours relating to children's snacks, December 2020
- Innovate with flavours and types of snacks to keep shoppers engaged
- Use seasonal flavours to maintain consumer interest
- International inspiration: adult food trends extend into children's products
- Snacks that support immune health are an unrealised opportunity
- Examples of snacks with immune health claims
- Develop snacks with eye health benefits
- Examples of snacks with eye health claims

Parents' attitudes towards snacks for children

- Make children's snacks as natural as possible
 - Graph 19: parents' attitudes towards snacks for children, December 2020
- Single-serve packs are key to portion control
- International inspiration: advertising themed around small portion size giving permissibility
- Use sustainable packaging on single-serve formats to win over consumers
- Need for more health-led innovation in children's snacks

- 45% of parents want more guidance on healthy snacks
 - Graph 20: parents who agree there is not enough guidance on which snacks are healthy for children, by age group, December 2020
- Offer healthy meal plans with snack suggestions to appeal to parents
- Plant-based children's snacks attract strong consumer interest
- Non-dairy children's yogurts

LAUNCH ACTIVITY AND INNOVATION

- A note on product coverage and definitions
- Children's snacks take a small share of snack launches
- Chocolate products lead for children's snack launches
 - Graph 21: children's snack launches, by category, 2017-20
- Sugar-related claims are under-explored in the children's snacks category
- A few brands release reduced sugar children's products in 2020
- Examples of reduced-sugar claims in children's snacks
- Fortified snacks launches
 - Graph 22: leading 'plus' health claims in children's snack launches, 2017-20
- Fortified biscuits should appear as a better-for-you treat
- Offer organic children's snacks to appeal both on health and ethical grounds
- Examples of organic children's snack launches
- Examples of launches with clean label claims
- Vegan launches rise in 2020
- Examples of children's snacks with vegan claims

APPENDIX

Appendix – abbreviations and consumer research methodology

- Abbreviations
- Consumer research methodology
- A note on language use

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