

# SALTY SNACKS – THAI CONSUMER – 2023

Sodium reduction can help motivate consumption. Consumers want salty snacks to support physical, mental and emotional health while also delivering flavour novelty.



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# Salty Snacks – Thai Consumer – 2023

## This report looks at the following areas:

- Consumption patterns of salty snacks
- Penetration of the different types of salty snacks
- Barriers towards higher consumption frequency of salty snacks
- Interest in trying healthy, better-for-you salty snacks and their success potential
- Features that are most crucial for a salty snack to be considered healthy to trigger consumption
- Consumers' attitudes regarding salty snacks and behaviours regarding choice of salty snacks
- Consumers' perception regarding features that would be good for different consumption occasions

## Overview

Salty snacks garner a high penetration in the market, but daily consumption remains limited. A negative health halo is inhibiting more frequent consumption among consumers. With comfort snacking on the rise in the market, salty snacks will continue to grow in relevance; however, the demand for better-for-you innovations will continue to shape consumption.

The more frequent the consumption, the higher the interest in healthy salty snacks. Permissibility is at the front of consumers' minds when they think of healthy salty snacks, with sodium content being the greatest barrier towards higher consumption. Brands have the opportunity to prioritise sodium claims with positive nutrition such as high protein and fibre.



Sodium reduction can help motivate consumption. Consumers want salty snacks to support physical, mental and emotional health while also delivering flavour novelty.

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Moreover, older men and women aged 35+ are driving the demand for functional indulgence, as they seek innovations with functional ingredients that provide holistic wellness.

Aside from better-for-you features, flavour innovations will be key to maintain consumption frequency and keep daily consumers engaged.

In this Report, learn how brands can increase consumption frequency and maintain relevance among daily consumers. Understand how brands can rightly develop a better-for-you proposition, position for different dayparts and occasions, and drive novel flavour innovations.

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# Report Content



## EXECUTIVE SUMMARY

- Mintel's perspective

### Key issues covered in this Report

- Overview
- The outlook of the salty snacks market in Thailand
- Salty snacks are becoming a 'soul food' with rising demand for functional indulgence
- The more frequent the consumption, the higher the interest in healthy salty snacks; prioritise sodium reduction
  - Graph 1: interest in trying healthy salty snacks, by consumption frequency of salty snacks in the last three months, 2023
- Men and women aged 35+ desire holistic wellness benefits
- The more frequent the consumption, the higher the search for novel flavour varieties

## KEY TRENDS

- What you need to know
- Apply different expressions of indulgence to cater to diverse consumer needs

### The emotional snacking revolution

- "Sorry, not sorry!" – heavy mental load drives desire for unguilty pleasures
- Comfort foods and snacking are on the rise for emotional support
  - Graph 2: ways of enhancing state of mind in the last six months, 2022
- Junk foods transition to 'soul food': salty snacks are a famous emotional indulgence among Thais
  - Graph 3: food and/or drink consumed to enhance state of mind in the last six months, 2022
- Salty snack brands are building associations with mood-enhancement benefits

### Growing demand for permissible and functional indulgence

- Health is at the top of Thai consumers' minds
  - Graph 4: top three most important factors considered when choosing packaged food and/or drinks, 2022
- Health/nutrition claims have flourished in Thai food and drinks over the last three years as a way to add perceived product value
  - Graph 5: launches of food and drinks, by claim category, 2020-22
- Consumers are rationalising the added nutrition in food and drinks
- Consumers are relying on brands to guide them towards healthy product choices
- Consumers seek functional indulgence that expands beyond nutrition to include emotion



## The adventuresome consumer: hunger for new experiences

- The price of experience is growing
- Consumer desire for novel experiences sets expectations for flavour innovations
- Mintel Trend: Sense of the Intense
- Sensorial attributes in food and drinks have a direct link with mental enhancement for Thai consumers
  - Graph 6: attributes in food and/or drinks that consumers think can enhance mental wellness, 2022

## WHAT CONSUMERS WANT AND WHY

- What you need to know

### Consumption of salty snacks

- A quarter of Thais consume salty snacks daily
  - Graph 7: consumption frequency of salty snacks in the last three months, 2023
- Gen Z are daily snackers while Millennials snack a few times a week
  - Graph 8: select consumption frequency of salty snacks in the last three months, by generation, 2023
- Segmenting consumers by their frequency of snacking
- Potato chips win the salty snacks space by a significant margin
  - Graph 9: consumption of salty snack types in the last three months, 2023
- Bean-based snacks, wheat-based snacks and salted nuts are popular among older Thai consumers
  - Graph 10: consumption of select salty snack types in the last three months, by generation, 2023
- Dayparts and consumption occasions play a significant role in the choice of salty snacks

### Drive consumption with permissible indulgence

- The more frequent the consumption, the higher the interest in healthy salty snacks
  - Graph 11: interest in trying healthy salty snacks, by consumption frequency of salty snacks in the last three months, 2023
- Among non-daily consumers, a negative health halo inhibits consumption
  - Graph 12: reasons for not consuming salty snacks more frequently, 2023
- Better-for-you salty snacks garner the most interest from urban Bangkokians
  - Graph 13: select 'very interested' in trying healthy salty snacks, by region and area, 2023
- Potential exists for better-for-you salty snacks to draw a premium
  - Graph 14: agreement with select statements about salty snacks, by monthly personal income and financial situation, 2023
- To make salty snacks healthy, call out protein source and reduce fat and sodium content
  - Graph 15: factors most crucial for a salty snack to be healthy enough to consume, 2023
- Prioritise sodium reduction in salty snacks
  - Graph 16: 'low in salt' is crucial for a salty snack to be healthy enough to consume, by generation, 2023
  - Graph 17: consumers that have not consumed salty snacks more frequently in the last three months because the sodium content is concerning, by generation, 2023

## Salty Snacks – Thai Consumer – 2023

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- Skip the salt, not the taste
- Make use of potassium chloride to reduce sodium in salty snacks

### **Optimise nutrition for the 'snackified-meal' occasion**

- Target the 'snackified meal' occasion with high-protein salty snacks
- Call out protein quantity and source front and centre of pack
- Offering satiety and wholesome nutrition can unlock new occasions for salty snacks
- Satiety benefits can boost snacking frequency among non-daily snackers
- Focus on ingredients and macronutrients to showcase satiety
- Position as an energy boost with fibre to satisfy hunger for a longer time
- Pack size and texture can help communicate satiety
- Use high-protein and high-fibre claims to tailor salty snacks for meal occasions
- Meal in-a-bag: innovate and communicate all the nutrients needed for a balanced meal

### **Opportunity for snacks that feed the mind**

- Men and women aged 35+ desire holistic benefits in better-for-you salty snacks
  - Graph 18: select 'contains functional ingredients for both physical and mental health well being' as crucial factor for a salty snack to be healthy enough to consume, by gender and age, 2023
- Mind-boosting functional ingredients to highlight in salty snacks
- Innovate with functional ingredients such as adaptogens
- Take inspiration from innovating with nootropics to position for a healthy mind: support mood, energy and focus
- Offer mental comfort with indulgent and familiar flavours
- Target Gen Z's me-time snacking occasion with indulgence plus feel-good messaging
- Stress-relieving ingredients can elevate the mood-boosting qualities of snacks
- Mood-boosting, stress-alleviating ingredients to highlight in salty snacks
- Celebrate stress-relieving ingredients to provide support for anxious consumers

### **Drive engagement with fun and novel flavour innovations**

- Offer fun flavours and textures for the we-time snacking occasion
- Drive communications with flavour intensity and fun at the core
- Innovate with common Thai street food flavours such as boat noodles
  - Graph 19: consumers that constantly look for new flavors of salty snacks to try, by consumption frequency, 2023
- Take inspiration from emerging flavours in the Thai salty snacks market to provide novelty
- Explore novel flavours that hold a stable growth momentum in the Thai market
- Take inspiration for novel flavour innovations
- Offer novelty by twisting familiar flavours into a novel format
- Leverage the use of co-branding to push the boundaries of flavour innovations
- Position as a tea/coffee accompaniment with sweet-flavoured salty snacks

- Take inspiration from sweet-flavoured salty snacks to balance out taste palates

### **APPENDIX**

- Consumer research methodology

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