

SNACK, NUTRITION AND PERFORMANCE BARS – US – 2024



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



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Snack, Nutrition And Performance Bars - US - 2024

This report looks at the following areas:

- Bar type purchase and frequency
- Adult and kids' bar occasions
- Adult and kids' bar priorities
- Attitudes toward bars
- External factors impacting bar purchase
- The market and brand activity



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

Overview

Bars are mini-experiences that can span the health and wellness spectrum according to what consumers need in a given moment. And consumers' current lifestyles mean these needs change – often. Between balancing changing work dynamics and kids' changing schedules, time for quality nutrition is limited and opens doors for brands to offer relief for the whole family.

These mini-experiences can offer both momentary comfort and novelty without reinventing the wheel. It makes sense that familiarity and routines are strong factors in managing day to day decisions, bar choices included; but these can be expanded with some creativity that creates new associations and occasions that exponentially build on bars' inherent versatility.

The main challenge brands face may be a growing private label presence, seen across segments as inflation wore on consumers post-pandemic. Brands may need to reconvince consumers of their value as modern stressors continue to pile on consumers' day to day; yet these same stressors can increase bars' appeal, too.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

The snack, nutrition and performance bar consumer: fast facts

Bar type purchase

- Are meal replacement bars absorbing nutrition bar needs?
 - Graph 1: bar type purchase, 2022-23
- Finances change bar type – but not overall engagement
 - Graph 2: bar type purchase, by financial status, 2023
- Moms want hunger solutions; dads want tools
 - Graph 3: bar type purchase, by parental status and gender, 2023
- Support kids' growing independence with bars
 - Graph 4: snack, nutrition and performance bar purchase, 2023

Bar frequency

- Performance bars demonstrate role of routine
 - Graph 5: bar consumption frequency, 2023

Adult bar occasions

- Creative pairings can expand bar occasions
 - Graph 6: adult bar occasions, 2023
- Support entire financial spectrum with well-rounded solutions
 - Graph 7: bar occasions, by financial status, 2023
- Generational differences point to shifting snacking behaviors
- Generational differences point to shifting snacking behaviors
 - Graph 8: adult bar occasions, by generation, 2023

Children's bar occasions

- Help parents control the chaos
 - Graph 9: children's bar occasions, 2023

Adult bar priorities

- "Real" and filling top the charts
 - Graph 10: adult bar priorities, 2023
- Priorities by financial health reflect widened dietary gaps
 - Graph 11: adult bar priorities, by financial status, 2023
- Parents' own needs reflect US lifestyles
 - Graph 12: adult bar priorities, by parental status, 2023

Children's bar priorities

- Bargaining with kids' palates wins out
 - Graph 13: children's bar priorities, 2023

Attitudes toward bars

- Expand flavor horizons via casual introductions...without neglecting core
 - Graph 14: select attitudes toward bars, 2023
- Get parents' attention via fun flavor innovation
 - Graph 15: attitudes toward bars, by parental status and gender, 2023
- Own distinct bar identities
 - Graph 16: select attitudes toward bars, 2023
- Younger generations set time and place for high-power formulations
 - Graph 17: attitudes toward bars, by generation, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Flavor innovation showcases rich experiences in small packages
- Flavor innovation showcases rich experiences in small packages
- "Real" formulations: pare it down, jazz it up
- Pared down...
- ...jazzed up
- Think outside the bar

Opportunities

- Versatility can expand even the most classic options
- Tack on functionality to drive a premium

- Graph 18: attitudes toward bars, 2023

THE MARKET

Market context

Market drivers

- Flexible schedules encourage flexible solutions
 - Graph 19: work situation, 2023
- Snacking as a way of life
 - Graph 20: snacking frequency, 2023
- "Ozempic era" reflects blurring of pop and diet culture
 - Graph 21: interest in BFY benefits, 2023
- Ultra-processing discussions may draw higher scrutiny of ingredient labels
 - Graph 22: attitudes toward bars, 2023

Market size and forecast

- Bars' versatility will carry the category through 2028
- Retail sales and forecast of bars
- Retail sales and forecast of bars

Market segmentation

- Retail sales of bars, by segment
 - Graph 23: total retail sales and forecast of snack, nutrition and performance bars, by segment, at current prices, 2018-28
- Snack bars: lean into on-the-go flavor
- Retail sales of snack bars
- Performance bars: maintain specialized identity
- Retail sales of performance bars
- Nutrition bars: quality, concentrated nutrition as a value proposition
- Retail sales of nutrition bars
- Weight loss bars: find new footholds
- Retail sales of weight loss bars

Market share/brand share

- Category leaders challenged by private label, "others"
- Sales of bars, by company
- Nature Valley maintains lead within snack bars segment
- Nature Valley releases
- Sales of snack bars, by company

- Cliff holds half performance bar market, despite share loss
- Sales of performance bars, by company
- Quest secures quarter nutrition bars market
- Sales of nutrition bars, by company
- "Other" brand losses prop up leaders amid overall weight loss bar declines
- Sales of weight loss bars, by company

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Forecast
- Forecast fan chart
- Total market (inflation-adjusted)
- Retail sales of snack bars (inflation-adjusted)
- Retail sales of performance bars (inflation-adjusted)
- Retail sales of nutrition bars (inflation-adjusted)
- Retail sales of weight loss bars (inflation-adjusted)

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