

## SNACKING TRENDS #2

Seasoning concepts for savoury snacks // pellet snacks

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The global snacking trend continues to gain momentum

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## The global snacking trend continues to gain momentum

Historic steady growth in the snacks category is clearly replicated over the forecast period. Vegetable, pulse and bread chips are among the categories with the highest value growth within the last two years.

A flurry of new product developments driven by health & wellness trends, innovation towards exotic ingredients and flavours, as well as regional cuisine influence the growth and lead to category consolidation in the premium space.

Modern consumers are much more educated about what they consume and pay attention to product labels. Companies are therefore catering to consumer demands for healthier snacks but also clear and easy-to-read labels. As a result, new product developments through inclusion of sustainable proteins, ancient grains, local and functional ingredients will see positive growth in the category.



## The global snacking trend continues to gain momentum

**The rise of private label brands:** Private label has undergone considerable transformation in recent years, introducing savoury snacks with exotic flavours, seasonal themes and by following healthy trends, all at attractive prices for consumers.

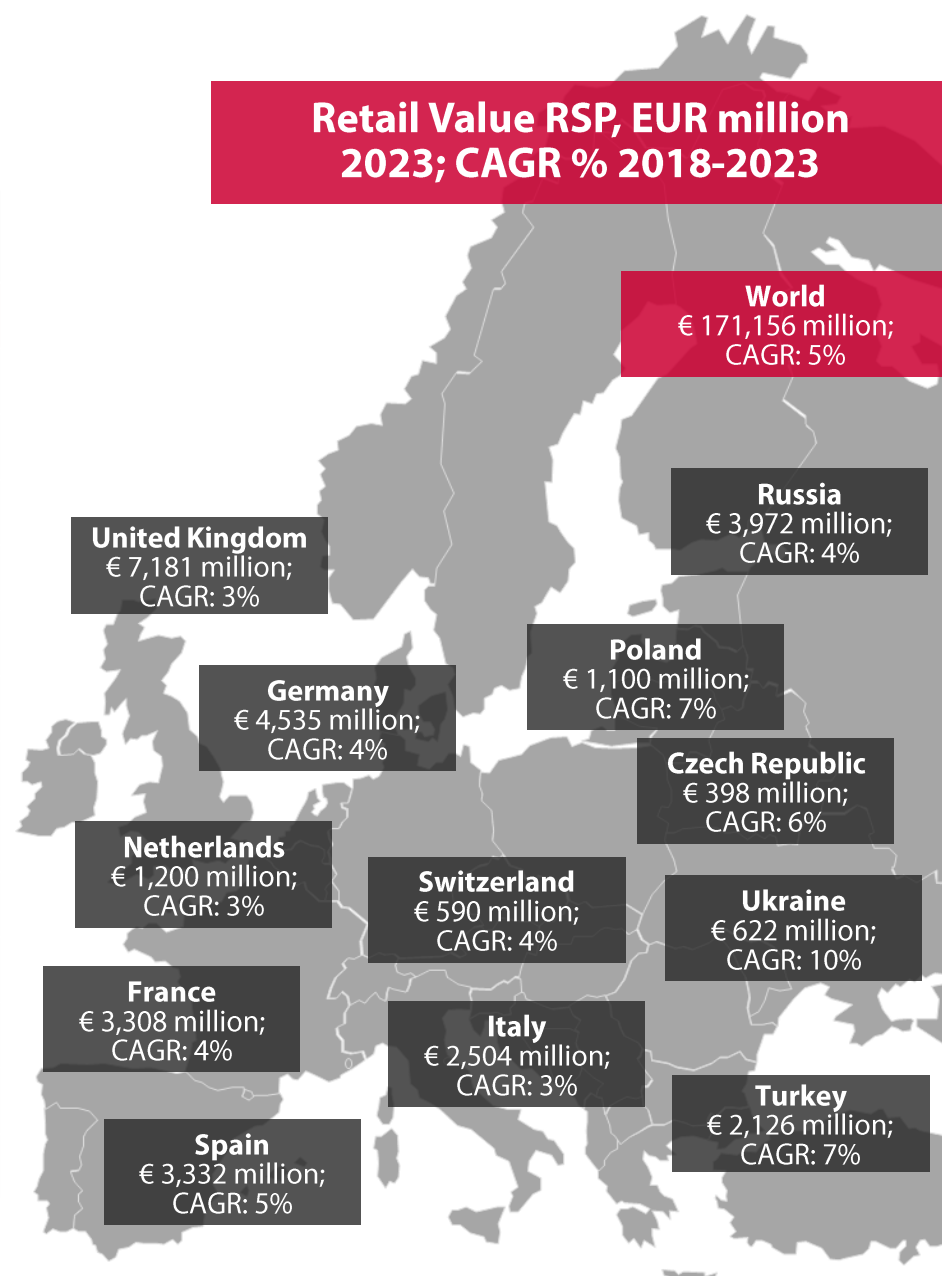
**In summary,** high urbanisation, healthy claims and innovations bringing "better-for-you" options to the market will contribute to overall growth in savoury snacks. This strong influence of healthy trends, supported by the growth of social media will see consumers turn to products that are more natural, less processed, higher in fibre and protein as well as reduced in fat and sugar.

**Category innovation combined with mindful consumption will drive sales.** With further growth driven by indulgence and the need for healthier snacking options, the industry needs to focus on delivering both excellent taste and functional product solutions.

# Market data: Forecast

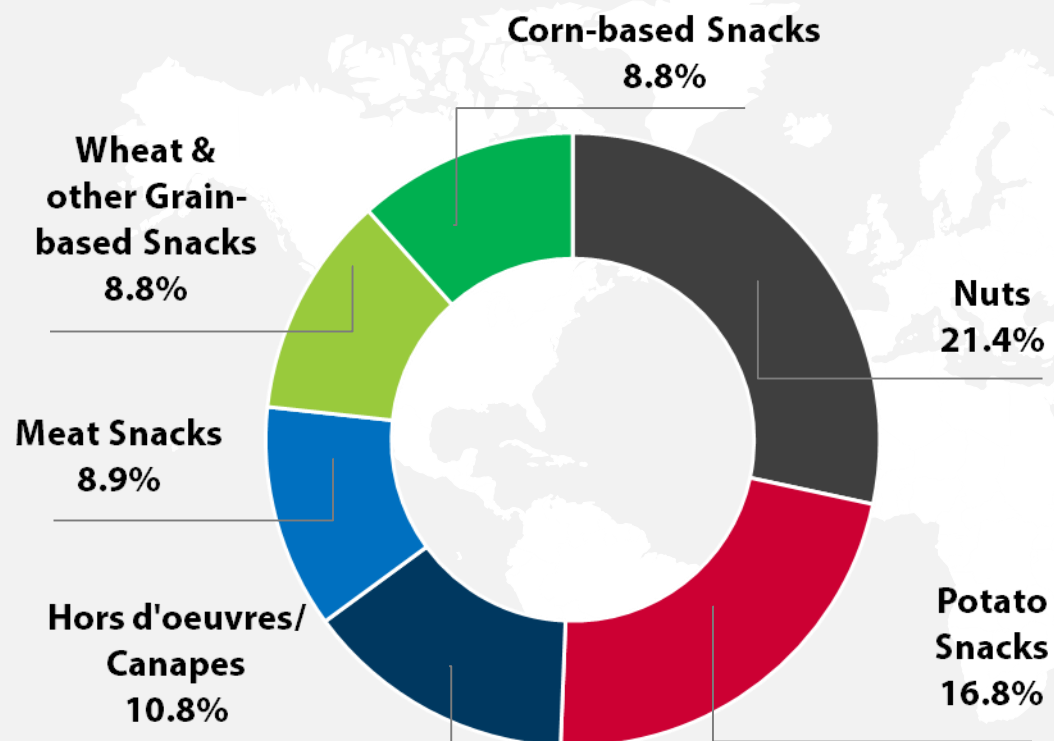
Savoury Snacks   Market Sizes   Total Volume   `000 Tonnes							
Geography	2018	2019	2020	2021	2022	2023	2018 - 2023 %
World	19,606.4	20,215.3	20,853.3	21,536.1	22,273.2	23,258.3	19% (CAGR: 4%)
United Kingdom	733.6	736.1	735.5	735.7	735.7	736.8	0.4% (CAGR: 0.1%)
Italy	411.1	420.7	431.0	442.4	455.0	637.1	55% (CAGR: 9%)
Russia	553.3	564.7	576.5	588.7	601.3	613.9	11% (CAGR: 2%)
Spain	498.5	513.5	528.2	543.0	558.2	574.0	15% (CAGR: 3%)
Germany	471.0	485.2	497.5	507.7	515.7	521.8	11% (CAGR: 2%)
Turkey	308.8	326.2	346.0	366.4	387.4	409.5	33% (CAGR: 6%)
France	345.7	351.5	356.8	362.1	367.4	373.0	8% (CAGR: 2%)
Poland	144.5	150.8	157.3	163.9	170.7	177.3	23% (CAGR: 4%)
Netherlands	163.2	165.3	167.7	170.3	172.8	175.2	7% (CAGR: 1%)
Ukraine	83.3	85.8	89.2	93.1	97.5	102.2	23% (CAGR: 4%)
Czech Republic	46.0	46.6	47.2	47.7	48.2	48.6	6% (CAGR: 1%)
Switzerland	40.6	41.2	41.8	42.4	42.9	43.5	7% (CAGR: 1%)

## Retail Value RSP, EUR million 2023; CAGR % 2018-2023

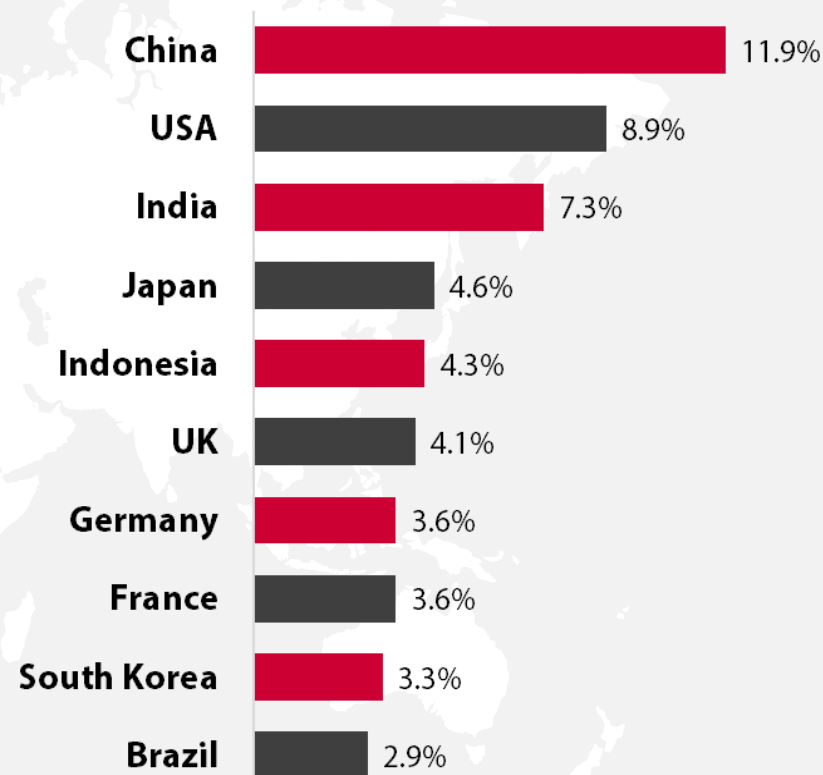


# Market insight: Savoury snacks NPD // Global

**Top 6 sub-categories** as a % of NPD in savoury snacks\*, 01/2016 - 06/2019



**Most active countries** as a % of NPD in savoury snacks\*, 01/2016 - 06/2019



\*Savoury snacks category contains: Bean-Based Snacks, Cassava & Other Root-Based Snacks, Corn-Based Snacks, Potato Snacks, Rice Snacks, Vegetable Snacks, Wheat & Other Grain-Based Snacks, Other Snacks, Snack Mixes, Nuts, Meat Snacks and Hors d'oeuvres/Canapes.

# Market insight: Savoury snacks NPD // Europe

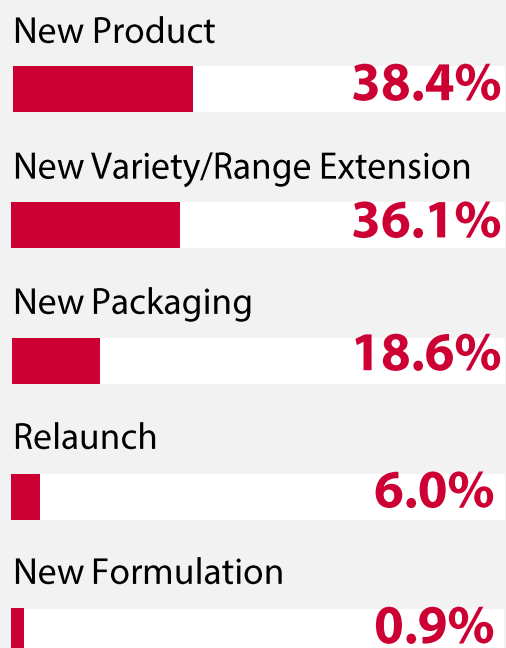
NPD activity on savoury snacks in Europe,  
01/2016 - 06/2019

Mintel

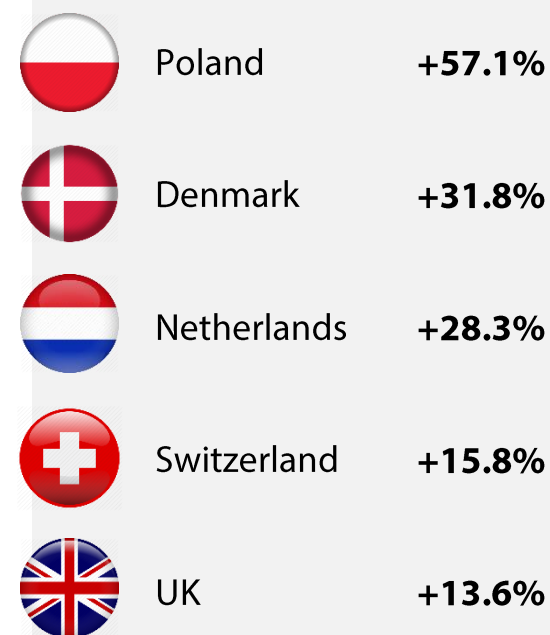
## Total Number of Launches:



## Launch Type



## Top Growing Countries



\*Savoury snacks category contains: Bean-Based Snacks, Cassava & Other Root-Based Snacks, Corn-Based Snacks, Potato Snacks, Rice Snacks, Vegetable Snacks, Wheat & Other Grain-Based Snacks, Other Snacks, Snack Mixes, Nuts, Meat Snacks and Hors d'oeuvres/Canapes.

# Market insight: Savoury snacks NPD // Europe

NPD activity on savoury snacks in Europe,  
01/2016 - 06/2019

**Mintel**

## Top Flavours/Taste Directions:

Salt/Salted	5.7%
Salt/Salted & Roasted/Toasted	4.4%
Roasted/Toasted	2.8%
Cheese	2.6%
Salt (Sea)/Fleur de Sel	2.4%
Paprika	1.9%
Onion & Sour Cream	1.2%
Barbecue/BBQ/Barbacoa	1.1%
Chili/Chilli Pepper	1.0%
Vegetable	1.0%

## Top 5 – Growing Flavours (01/2016 - 12/2018):

**+51.2%** Vegetable

**+43.8%** Salt (Sea)/Fleur de Sel

**+42.9%** Sour Cream & Onion

**+40.0%** Peanut/Groundnut

**+27.0%** Sweet Chili

# Market insight: Savoury snacks NPD // Europe

NPD activity on savoury snacks, 01/2016 - 06/2019, Europe

MINTEL

## Top Claims on Packaging:

Low/No/Reduced Allergen	18.5%
Gluten Free	17.9%
Vegetarian	16.3%
No Additives/Preservatives	15.7%
Social Media	14.1%
Organic	13.3%
Vegan/No Animal Ingredients	11.4%
Ethical - Environmentally Friendly Package	8.4%
Ethical - Recycling	7.4%
Ease of Use	5.2%

## Trending Claims (01/2016 - 12/2018):

**+72.1%** High/Added Fibre

**+65.4%** Vegan

**+29.5%** Gluten Free

**+28.8%** No/Reduced Allergen

**+26.8%** Low/No/Reduced Fat





## Consumer insights: The evolution of the snacking market

- The healthy snacking trend creates a strong need for natural ingredients, transparency and simplicity of ingredients, with a majority of consumers looking for snacks without artificial additives.
- It further indicates a need to focus on salt-reduced product developments and low-calorie options in the long-run.
- At the same time, added nutrients (i. e. high fibre or protein content) are an overall approach of manufacturers to evolve the category of "better for you snacks".
- Innovation towards reformulation with claims around vegan, gluten free and raw ingredients is estimated to keep attracting new consumers to the savoury snack categories over the forecast period.



## Consumer insights: The evolution of the snacking market

- The snacks category is also driven by a shifting demand towards convenience formats or texture varieties and most of all new concepts.
- As "all time snacking" becomes mainstream, there is an ever-increasing variety of snacking options available, driving the interest of consumers for novelties, experimentation and shareable, "insta-ready" experiences.
- Indulgence and enjoyment still represent the main consumption criteria in the snack sector. Offerings are therefore focusing on excellent and unique taste, premium ingredients or superior production methods, such as "hand-cooked".
- Texture should not be forgotten as consumers will continue to choose new and different formats like lattice, which holds more flavour.

# The snacking evolution: Key findings

1

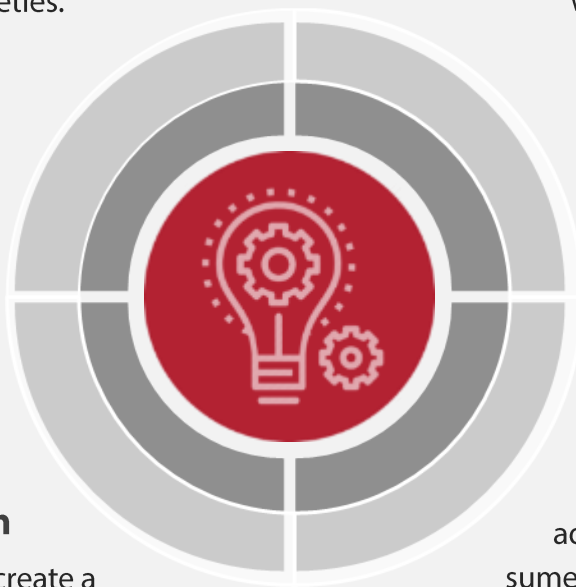
## Health-conscious consumers driving sales

Savoury snacks are perceived as a healthier snacking option, compared to high-sugar varieties. Presence of healthier options (such as fruit or vegetable chips) and nutrient-dense products with a clear shift towards higher protein and fibre content will see further strong growth. Innovative ingredients such as ancient grains and sustainable proteins positively impact the category.

2

## New, exotic flavours and textures are driving innovation

Unique tastes and adventurous flavours help create a total eating experience; as a result, shelves are increasingly full not only with local but also with Mexican flavours, spicy tastes and Asian influences, that are expected to keep flourishing in the coming years.



## Ethical concerns continue shaping the snacks arena

3

Educated consumers are seeking products with shorter ingredient lists and clean, simple packaging information with reduction of E labels. Locally-sourced, sustainable, natural ingredients and less processed products are especially appealing to modern consumers.

## Market maturity can slow down the progress

4

Market maturity and saturation might be problematic in some regions. Successful advertising campaigns, engagement with consumers via social media and increased possibilities for consumers to choose from a variety of products, formats and flavours will therefore have a positive impact. Portability and packaging invention will also play an important role in category growth.

# Innovation implications & macro trends for savoury snacks



## FLORAL FLAVOURS

Flavour combinations between savoury and sweet have been blurring in recent years.

- ➔ Floral tastes are well established in sweet segments
- ➔ Consumers are open to the concept of blurred lines between sweet and salty
- ➔ Opportunity for floral flavours to shift over



## SUPER POWDER

Powder topping is currently popular for categories such as smoothies and cereals/bowls.

- ➔ They help to customise, adding a variety of flavours or nutrients
- ➔ Offering options of added powder for snacks addresses busy consumers looking for products that fit their needs while being hassle-free



## DAY-PART TARGETING

Consumers are snacking partly because they are busy, and try to replace full meals.

- ➔ They will appreciate products allowing them to save time, e.g. through product sizing
- ➔ Day-part targeting will likely be a key part of a product proposition: e. g. targeting the mid-morning break or post-work relaxation

# Future outlook: #What'sNext?



## INSECT PROTEINS

The popularity of protein diets is influencing the mass market and fostering opportunities for insect proteins, as consumers show greater openness and experimental tendencies across the globe.



## PRODUCT REFORMULATION

Simplicity of ingredients is important in a time where consumers are sceptical about what they consume. Reflecting this instantly to busy consumers will also be an important quality.



## CARBOHYDRATES ARE HERE TO STAY

Carbohydrates are often regarded as having a negative impact on health. Highlighting “good carbs” and informing about consumers’ intake will be key to change perceptions.




## COLOURFUL ALL AROUND

Social media plays a huge part in individual’s lives, and this means savoury snacks can benefit from having “insta-ready” qualities that make consumers want to share images.

### KEY INNOVATION PLATFORMS

- |   |  |  |   |
|---|--|--|---|
| <ul style="list-style-type: none"><li>• Target health and ethical-focused consumers using the nutritional properties of insect proteins</li><li>• Use flour formats to make eating insects mainstream and skip the „ick-factor“</li><li>• For experimental use, insect snacks should be naturally looking and able to be identified as such</li></ul> | <ul style="list-style-type: none"><li>• List ingredients (that consumers recognise) in front of the packaging and highlight simplicity via branding</li><li>• Focus on short ingredients lists or see-through packaging</li><li>• Products made from by-products can help to stand out and boost value</li></ul> | <ul style="list-style-type: none"><li>• Focus on using ingredients consumers associate with having a positive impact, and emphasise nutrients such as fibre</li><li>• Clearly label healthy ingredients on the packaging</li><li>• Using exotic ingredients with good carbs is a good way to excite experimental consumers</li></ul> | <ul style="list-style-type: none"><li>• Offer snacks made from exotic ingredients or present unique taste variations</li><li>• Consumers aged under 25 are influenced by products that their friends are talking about, as well as through celebrity endorsements</li></ul> |
|---|--|--|---|



## Addressing current market needs and consumer trends within the snacking sector – Bell's capabilities for savoury snacks

Based on its extensive global network, Bell has a strong expertise in predicting dynamic market categories, major trends and taste directions that will shape the snacking industry in the future.

Recognising consumer behaviour at an early stage and reflecting the taste preferences of different consumer groups and markets is therefore a key element of successful product creation at Bell.

Underlining its vision of being the partner of choice for creating inspirational and winning product concepts, Bell is therefore focusing on product developments to define or differentiate the final taste of a product or to deliver functional solutions for savoury snacks.

**Get in touch with taste – and discover Bell's authentic snack seasonings inspired by major snacking trends.**

# Delivering solutions for the snacking industry – authentic seasonings based on taste and functionality



Intense and complex flavour profiles for creating authentic eating experiences.



Product creations based on consumer needs as well as in-depth market and trend research.



Functional taste solutions (e.g. clean labelling, depictional ingredients, low salt or sugar content, allergen free, non-GMO, if required).



Tailored services including sensory validation and support, regulatory expertise and manufacturing flexibility.



Broad portfolio of classic and innovative seasonings based on natural flavours.



Customised solutions focusing market needs on a global and regional level.

Bell's portfolio of natural snack seasonings delivers high quality taste solutions for a variety of snacking products, including classic potato chips, extruded snacks and pellet snacks, as well as vegetable or grain-based snacks and popcorn.



# SNACKING TRENDS

## Culinary Street Food Varieties

# #1

### TREND OUTLOOK:

- Unique tastes and adventurous flavours help create a total eating experience. As a result, shelves are increasingly full not only with local but also with Asian tastes and other regional influences, that are expected to keep flourishing in the coming years.
- **Flavours continue to explore on-trend cuisines:** Salty snacks producers increasingly find inspiration from modern cuisines to pique consumers' interest.
- World food flavours associated with typical street food varieties are a popular theme in potato chips, but are further being explored by vegetable-based and meat snacks.

### CONSUMER INSIGHTS:

Consumers across all ages are happy to try food from other cultures and countries.

Exotic flavoured savoury snacks will trigger curiosity of consumers and their wish for experimentation and novelty.

With authenticity also being key for consumers, taste varieties need to focus on the unique ingredients that characterize regional street food cuisine.



**75%**  
of global consumers  
state that they enjoy  
experimenting with  
products from other  
countries.\*

# SNACKING TRENDS

## Culinary Street Food Varieties

#1



### ASIA: Creamy Chicken Satay

#### 4800320 Chicken Satay Seasoning

Declaration: Flavouring; allergen free; halal-conform;  
vegetarian & vegan

Dosage: 9%

RTE-Salt-Content: 1.2g

*Satay peanut sauce and chicken deliciously melt together in this seasoning.*



# SNACKING TRENDS

## Culinary Street Food Varieties

#1



### SCANDINAVIA: Kottbullar

#### 4800325 Kottbullar Seasoning

Declaration: Natural Flavouring; halal-conform;  
vegetarian

Dosage: 9%

RTE-Salt-Content: 1.2g

*A classic recipe delivering a meaty, creamy and slightly  
sweet taste profile.*



# SNACKING TRENDS

## Culinary Street Food Varieties

#1



### PACIFIC RIM: Exotic Poke Bowl

#### 4800321 Exotic Poke Bowl Seasoning

Declaration: Flavouring; fish powder, honey powder;  
halal-conform; palm oil free; yeast free

Dosage: 9%

RTE-Salt-Content: 1.2g

*A culinary journey and a great combination of honey,  
smoked fish and spices.*



# SNACKING TRENDS

## Culinary Street Food Varieties

#1



### JAPAN: Togarashi Seasoning

#### 4800337 Togarashi Seasoning

Declaration: Natural Flavouring; seaweed powder, chili powder; allergen free; vegetarian & vegan; yeast free

Dosage: 9%

RTE-Salt-Content: 1.1g

*Togarashi means "seven-flavour chili pepper" – and that's exactly what you get!*





# SNACKING TRENDS

## Foodie Culture

# #2

### TREND OUTLOOK:

- **Engage with young foodies:** More experimental approaches to innovation are needed to match the premium expectations of today's younger consumers.
- Snack food producers should consider more novelty in product developments. Especially adventurous flavours and cross-category inspirations generate attraction.
- Visual and sensory features are key in delivering share-worthy experiences to young consumers, while customisation could meet their interest in personalising their food.

### CONSUMER INSIGHTS:

Adventurous consumers are moving out of their comfort zones to explore multi-sensory food experiences and new discoveries.

A new generation of foodies is craving new sensations by exploring shape, texture, colour and flavour. They want to play with their food, exploring diverse cuisines, food trends and cutting-edge fusion foods with the potential to create share-worthy memories.



# 40%

of millennials are interested in innovative flavours, while 69% of millennials take pictures of their food before eating.\*

# SNACKING TRENDS

Foodie Culture

#2



## BURGER SAUCE - Natural Grill Notes -

### 4800318 Burger Sauce Seasoning

Declaration: Natural Flavouring; allergen free; halal-conform; vegetarian & vegan

Dosage: 9%

RTE-Salt-Content: 1.2g

*Grilled, meaty accords meet intense notes of mustard and a hint of creamy sauce – this taste pairing is simply irresistible!*



# SNACKING TRENDS

Foodie Culture

#2



## CRAFT BEER & BBQ SAUCE - Natural Smoke Notes -

### 4800319 Craft Beer BBQ Sauce Seasoning

Declaration: Natural Flavouring; allergen free; vegetarian & vegan; palm oil free; yeast free

Dosage: 9%

RTE-Salt-Content: 1.2g

*Tasteful malt and smoky BBQ accords create a unique and distinctive snack experience combining indulgent snacks with the craft beer mega trend.*





# SNACKING TRENDS

## Food Pairing at its Best: Pepper & Gin

# #3

### TREND OUTLOOK:

- While top chefs have experimented and applied the craft of food pairing some time ago, it is now experiencing new interest in a broader area, offering chances in conventional or innovative product developments.
- Evolving palates are driving the need for more adventurous or unexpected ingredient combinations, presenting new challenges for savoury snacks to evolve and develop sophisticated products.
- **Opportunities for snacks to pair with alcoholic drinks:** Enjoying savoury snacks with an alcoholic drink is not new but there is scope for operators to leverage this occasion more imaginatively.

### CONSUMER INSIGHTS:

Consumers want taste, flavour, texture, and unique pairings they may not have heard of.

Customisation and tailored products are equally appealing for today's consumers, as they have turned away from the "one-fits-all" concept and expect products to fit within their particular lifestyles, or reflect an alignment with their personality, ethical or social values, etc.



Snack variants that are tailored for pairing with alcoholic drinks garner interest for a sizeable **41%** of UK snacks users.\*

# SNACKING TRENDS

Food Pairing at its Best: Pepper & Gin

#3



## THE PERFECT MATCH:

*This unique snacking experience gets invigorated when combined with a refreshing Gin & Tonic!*



## BENGAL PEPPER Incl. Bengal Pepper Extract

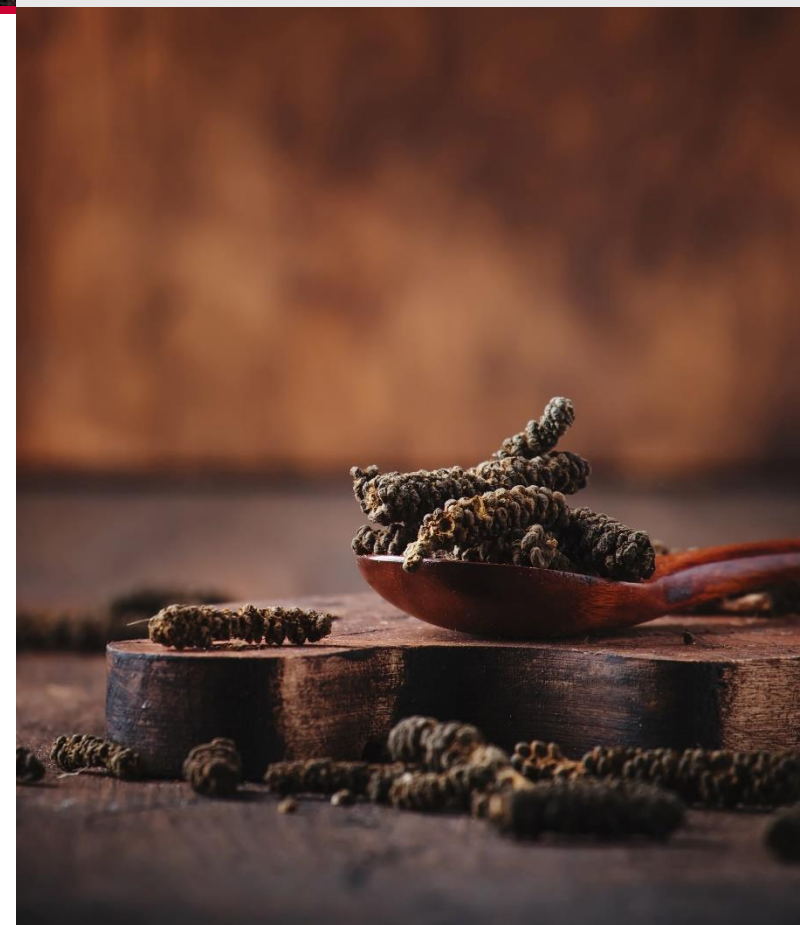
### 4800324 Bengal Pepper Seasoning

Declaration: Natural flavouring (incl. Bengal pepper extract); allergen free; halal-conform; vegetarian & vegan; palm oil free; yeast free

Dosage: 9%

RTE-Salt-Content: 1.2g

*A tingling and authentic seasoning emphasising exotic, spicy-warm notes that characterise Bengal pepper.*



# SNACKING TRENDS

Food Pairing at its Best: Pepper & Gin

#3



## THE PERFECT MATCH:

*This unique snacking experience gets invigorated when combined with a refreshing Gin & Tonic!*



## NEPAL PEPPER Incl. Nepal Pepper Extract

### 4800317 Nepal Pepper Seasoning

Declaration: Natural flavouring (incl. Nepal pepper extract); allergen free; halal-conform; vegetarian & vegan; palm oil free; yeast free

Dosage: 7%

RTE-Salt-Content: 1.2g

*A sharp, exotic seasoning that recalls nuances of herbs and grapefruit, and further delivers a distinctive cooling effect.*





# Ingredients List

## CREAMY CHICKEN SATAY

maltodextrin, sugar, spices, salt, yeast extracts, flavouring, instant caramel powder, acid (citric acid)

## KOTTBULLAR

maltodextrin, salt, whey powder, dextrose, spices, natural flavouring, yeast extracts, citric (citric acid)

## EXOTIC POKE BOWL

maltodextrin, sugar, salt, onion powder, garlic powder, flavouring, acidity regulator (sodium acetate), honey powder, fish powder, acid (citric acid), cocoa powder

## TOGARASHI

maltodextrin, sugar, salt, seaweed powder, chili powder, spices, acid (citric acid), natural flavouring (contains ginger and Nepal pepper extract)

## BURGER SAUCE

maltodextrin, salt, dextrose, spices, natural flavouring, yeast extracts, instant caramel powder, acid (citric acid), acidity regulator (sodium acetates)

## CRAFT BEER & BBQ SAUCE

maltodextrin, sugar, dextrose, salt, paprika powder, tomato powder, natural flavouring, instant caramel powder, acidity regulator (sodium acetates, calcium lactate), acid (lactic acid)

## BENGAL PEPPER

maltodextrin, sugar, salt, dextrose, flavouring preparations (contains Bengal pepper extract), spices, acid (citric acid)

## NEPAL PEPPER

maltodextrin, salt, sugar, dextrose, flavouring preparations (contains Nepal pepper extract), acid (citric acid), spice

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