



Bars

Market Trends

March 2022



**For more information, please contact
Tree Top Ingredients at
509-698-1435**

Contributing Editor
Justine Olson, Client Success Manager, Mintel



Snack Bars March 2022

Tree Top is proud to partner with Mintel to provide our customers with the latest research and new product introductions. Mintel is the world's leading market intelligence agency offering perspectives, purchasing data and insights.

Mintel's Perspective: 6 Years and Beyond

The return of the sustainable consumer

The need for sustained pro-environmental efforts will push more snack bar brands to adopt meaningful sustainability practices. These might include fully recyclable packaging solutions, ingredient upcycling and clearer on-pack communication.

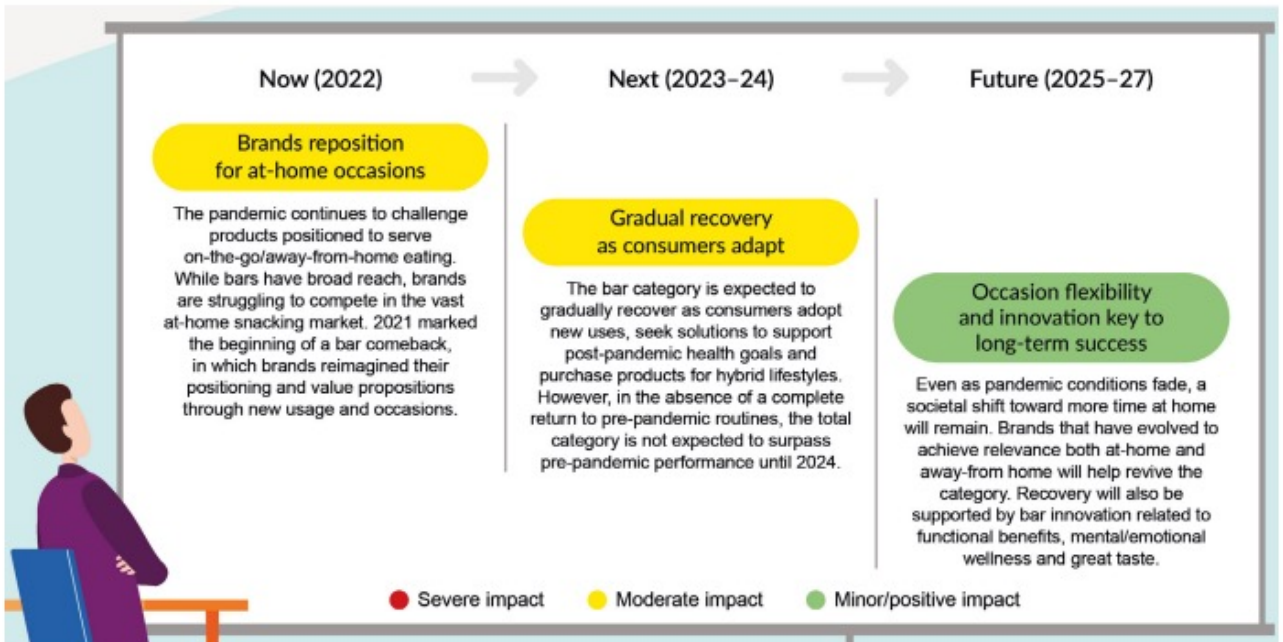
A (mini) meal for every occasion

Snack bar brands can find greater success in overtly positioning themselves as at-home/out-of-home meal replacements, providing 'convenient nutrition' beyond the morning meal occasion.

The evolution of smart nutrition

The definition of meal replacements is undergoing a makeover, with 'smart/complete nutrition bars' expected to gain a stronger market presence. 'Nutrient dense' can become a more common descriptor used when targeting a more mainstream audience.

FIGURE 2: SNACK, NUTRITION AND PERFORMANCE BARS OUTLOOK, 2022-27



Source: Mintel, January 2022



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Source: Mintel Global New Products Database (GNPD)





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Top Fruit Snack Bar Flavors and Claims (Feb 2020-2022)

Top Flavors

Sort by <input type="text" value="A-Z"/>	2020	2021	2022	Total Sample
Apple & Cinnamon	4.2%	8.2%	0.0%	5.5%
Apple	0.0%	12.2%	0.0%	4.7%
Banana & Choco...	4.2%	4.1%	16.7%	4.7%
Chocolate (Dark/...	4.2%	2.0%	0.0%	3.1%
Fruit	0.0%	8.2%	0.0%	3.1%
Banana & Peanu...	2.8%	2.0%	0.0%	2.4%
Almond & Choco...	4.2%	0.0%	0.0%	2.4%
Mango	2.8%	2.0%	0.0%	2.4%
Chocolate & Che...	1.4%	2.0%	0.0%	1.6%
Cinnamon & Raisin	2.8%	0.0%	0.0%	1.6%
Total Sample	100.0%	100.0%	100.0%	100.0%

0% of 2022 products are in Cinnamon & Raisin

Top Claims

Sort by <input type="text" value="A-Z"/>	2020	2021	2022	Total Sample
Kosher	73.6%	67.3%	66.7%	70.9%
Low/No/Reduced...	76.4%	61.2%	33.3%	68.5%
Gluten Free	75.0%	51.0%	33.3%	63.8%
GMO Free	63.9%	53.1%	33.3%	58.3%
Vegan/No Animal...	56.9%	30.6%	16.7%	44.9%
Social Media	27.8%	34.7%	50.0%	31.5%
Ethical - Environ...	30.6%	30.6%	50.0%	31.5%
Ethical - Recycling	30.6%	30.6%	50.0%	31.5%
No Additives/Pre...	27.8%	28.6%	66.7%	29.9%
Dairy Free	33.3%	24.5%	16.7%	29.1%
Total Sample	100.0%	100.0%	100.0%	100.0%

Top Fruit Snack Bar Products based on Purchase Intent (Feb 2020-2022)



1

Nature Valley Fruit & Nut
Trail Mix Chewy Trail Mix Granola Bars
66%* Purchase Intent



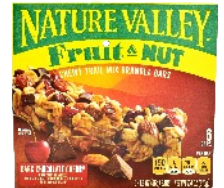
2

Millville Fruit & Grain
Apple Cinnamon Soft Baked Bar
65%* Purchase Intent



3

Nature Valley Soft-Baked Oatmeal Squares
Banana Bread & Dark Chocolate Bars
63%* Purchase Intent



4

Nature Valley Fruit & Nut
Dark Chocolate Cherry Chewy Trail Mix Granola Bars
63%* Purchase Intent



5

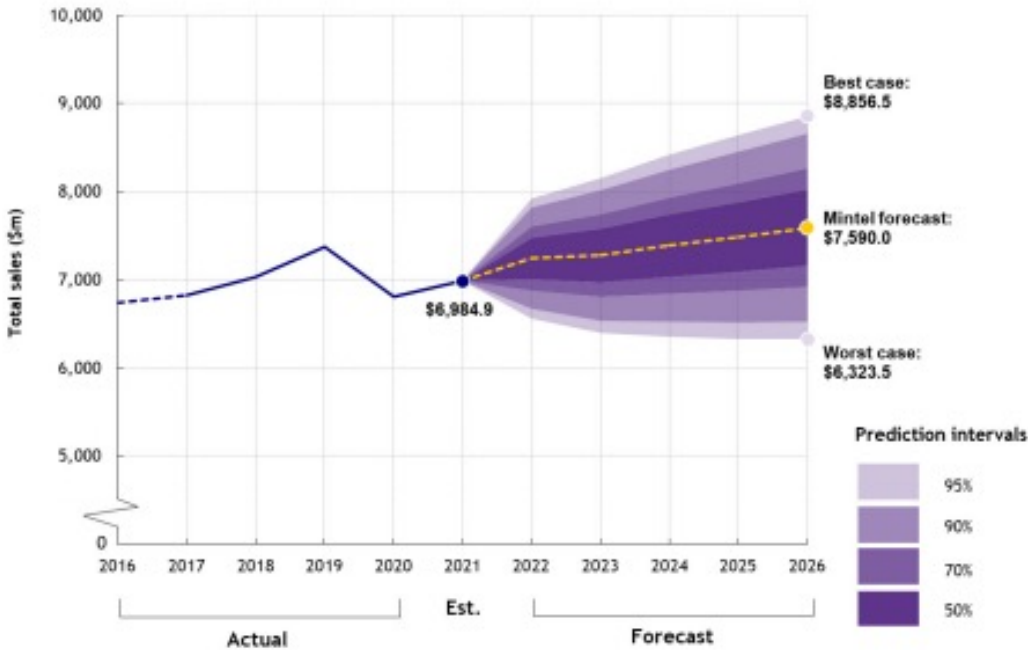
GFB
Chocolate Cherry Almond
Gluten Free Bars
61%* Purchase Intent



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Category Forecasting

FIGURE 9: TOTAL US SALES AND FAN CHART FORECAST OF SNACK, NUTRITION AND PERFORMANCE BARS, AT CURRENT PRICES, 2016-26



Source: based on IRI InfoScan® Reviews; CSPDailyNews.com; US Census Bureau, Economic Census/Mintel

Performance bars perform

While still falling shy of 2019 sales, performance bars saw the strongest growth of any segment in 2021, with another year of strong growth expected in 2022. To regain ownership of the fitness occasion, performance bars should look beyond the physical health benefits of working out.

Continued loss of relevance for weight-loss bars

Weight-loss bars are the only segment to see continuation of 2020 decline through 2021. Aligning with culturally relevant diets, such as Keto and Paleo, is a strategy already in the works by weight-loss bar segment leaders Special K and Atkins. 18% of US adults would be encouraged to try a new bar if it were made for a specific diet.

Bars on the menu

According to Mintel Menu Insights, snack/granola/breakfast bars have increased 115% on restaurant menus between Q2 2018-Q2 2021, primarily driven by the QSR segment. Further, 70% of US adults visit fast food restaurants, and 50% of QSR visitors would like to see healthier options. While previously the most natural fit for bars on QSR menu was likely kids meals, brands should strive to carve a spot on snack/value menus or even dessert menus.



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Source: Mintel Global New Products Database (GNPD)





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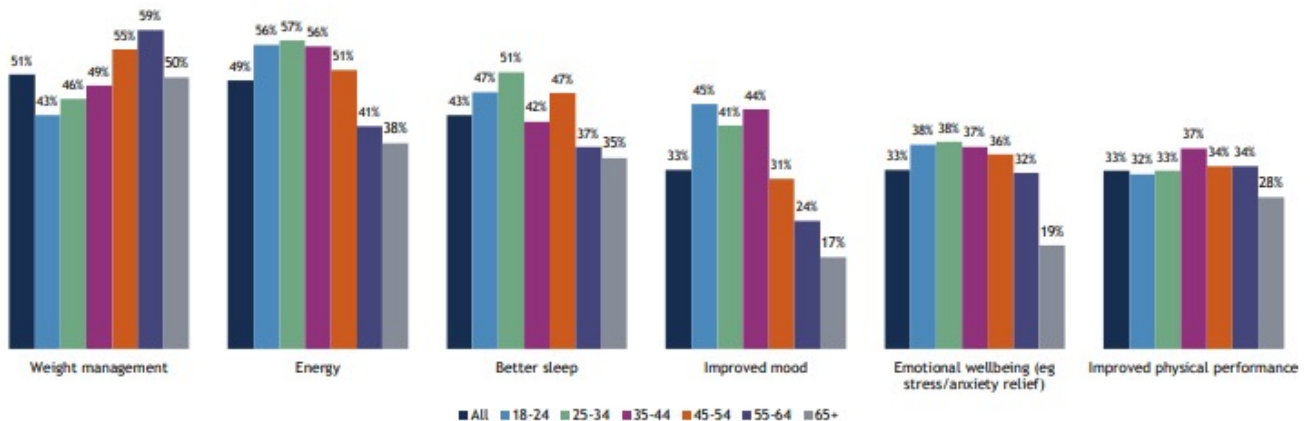
The Evolving Definition of Healthy

According to Mintel’s Better for You Eating Trends – US, 2021, half of consumers are choosing healthy foods more often than they were in the prior year (September 2020); however, what constitutes as a “healthy foods” is changing. A substantial portion of consumers, notably those aged 18-44, who represent **the core bar buying audience, want to see BFY food claims related to functionality, such as energy, sleep and mood support, and prioritize these claims over weight management.** Further explanation for consumers’ desire for food that supports holistic wellbeing is seen through Mintel’s Approach to Health Management – US, 2021, which finds consumers were more likely to experience a mental health condition from August 2020-21 than a common or chronic illness.

Nearly four in 10 US adults would be interested in purchasing a bar if it offered functional benefits.

The definition of personal health has been evolving for some time, accelerated by prolonged and ongoing pandemic conditions and the associated anxiety and burnout. As such, supporting consumers’ “healthy” dietary choices translates to solutions for physical, mental and emotional health.

“Which of the following benefits would you like to see from healthy/better-for-you foods? Please select all that apply.”



Base: 2,000 internet users aged 18+
Source: Kantar Profiles/Mintel, September 2021



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Health-conscious Snack Bar Products



Lidl Apple Cinnamon Flavored Soft Baked Fruit & Grain Cereal Bars are made with real fruit filling and are naturally flavored. This product is free from high fructose corn syrup, artificial flavors and certified synthetic colors, is a good source of nine essential vitamins, minerals, and contains 8g whole grain per serving.



Enjoy Life Chocolate Chip Banana Breakfast Ovals have been repackaged with a new look, and same delicious taste. The soft baked fruit and oat bars are free from 14 allergens including wheat, peanuts, tree nuts, dairy, casein, soy, egg, sesame, mustard, lupin, added sulfites, fish, shellfish and crustaceans. The gluten- and GMO-free bars provide 20g wholegrain per serving.



Lärabar Apple Pie Bars have been repackaged. This kosher and plant based product is suitable for vegans, is a good source of fiber, minimally processed and is made with just six real ingredients: dates, almonds, apples, walnuts, raisins and cinnamon. It is free from GMO, added sugar, gluten, dairy and soy

Consumers are interested in possible health factors of diet trends

The COVID-19 pandemic has encouraged more consumers in North America to more effectively manage their nutrient intake and eat a more balanced diet. In the US, for example, **93% of adults are making some effort to eat healthfully**. At the same time, 37% agree that diet trends like intermittent fasting or keto are a healthy way to eat.

The strength of this attitude illustrates how food producers, including snack bar brands, should consider such dietary behaviors in their innovation plans. Indeed, over the past year, snack bar brands have been innovating around more specific dietary interests.



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Anxiety is an Issue That Needs To Be Addressed

The COVID-19 pandemic continues to impact mental health, with many people experiencing anxiety – the body's reaction to stress – in their daily lives. A multidimensional construct, anxiety is also increasingly affecting the wellbeing of children and teens.

Managing stress and anxiety is therefore now more important than ever; dietary changes, physical activity, better sleep hygiene and relaxation techniques can all be part of anxiety management. Seeking professional help is, of course, the preferable solution when dealing with severe anxiety symptoms. In the US, for example, 84% of consumers say there is nothing wrong with getting help from a mental health care professional.

IN THE US

42%

of US adults like their food and drink to contribute to both their mental and physical health

It has also been shown that there is a link between heavy social media use and an increased risk of anxiety, which might drive more businesses to give up their social media presence.

Celebrate stress-relief ingredients to deliver added value for anxious consumer



Soothing lavender

Raw Fruit Bars with Organic Lavender are made with organic lavender to promote the wellbeing of the body and mind (Czech Republic).



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Dessert-themed Flavors And Multi-textural Creations Can Increase The Indulgent Nature Of Bars. On-pack And Social Media Communication Can Be Linked To Stress Relief



RXBAR Layers Layered Protein Bars are made with three egg whites, 29 peanuts and one date. Inspired by our nut butter and RXBARs, this two-layered protein bar packs its own delicious 1-2 punch with both peanut butter and chocolate



Good & Gather Pumpkin Pie, Date & Nut Bars are made with just seven ingredients including dates, cashews, dried pumpkin, ginger, cinnamon, nutmeg and allspice. This limited edition, vegan friendly and kosher certified product is gluten free and is said to be a wholesome addition to desk drawers, gym bags and lunch boxes alike.



Healthy Crunch Caramel Apple Granola Bars are said to contain nutrients equivalent to one serving of fruit and vegetables and 50% less sugar. They are free from peanut, dairy, gluten, soy and GMO and made in small batches. The artisanal school approved vegan food is a good source of fiber, and bearing the Women Owned, Non GMO Verified Project, Twitter and Instagram logos.

Indulgence is a psychological coping mechanism

Aiming to help consumers improve their mood and release stress and anxiety, snack bar brands should strongly embrace the concept of permissible indulgence. Many people turn to sweet treats when they feel anxious, and some studies show that sugar can act as a stress reliever by reducing levels of cortisol, the stress hormone. However, moderation needs to be part of the conversation since marrying taste with health is a long-term focus for a significant proportion of consumers.

Tasti Go On... Australia. This product provides less than 100 calories per bar, is a source of fibre and retails in a 105g recyclable pack containing five units and bearing the Weight Watchers Reimagined Loves logo.





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Functional snack bars can help consumers achieve a higher level of happiness

Apart from, being a source of nourishment, food brings happiness



Trader Joe's Cookie Mug Hangers (US)

Happiness and food are highly connected. Food affects the pleasure and reward centres of our brains by producing dopamine neurons that are primed for activation by any sign of food.

In Japan, 73% of consumers have not only eaten comfort food to tackle stress but would also do this again. Similarly in China, 56% of consumers have eaten delicious food to improve their emotional wellbeing and will continue to do so.

Of note is that a significant number of consumers claim that getting nutrients from food is preferred over supplements. A third of UK non-vitamin/supplement users prefer to get vitamins and minerals from their diet, while 43% of Indian consumers find it safer to get nutrients from food and drink than from multivitamins and supplements.

This shows potential for food/drink brands to engage in anxiety reduction and mental wellbeing as part of their positioning and communication.

'Good mood superfood'

Mindright Brain Food Good Mood Superfood Bars: 'Get your mind right with superfood-, prebiotic- and adaptogen-infused bars that boost energy, fight stress and improve focus & overall mood' (US).





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Consumers are looking for healthy snacks for children

In North America, snack bars are a popular choice among parents, with 83% of parents buying snack bars, compared with 57% for non-parents. Pressed for time and encumbered with many obligations, they seek bars that meet a range of family needs and preferences, including convenient, nourishing and fun options for their kids. Indeed, concerns about the healthfulness of their children's diets are strong and influence product selection.

In general, consumers consider health attributes important for bars, particularly the amount of protein, sugar, calories and fiber. Parents and non-parents are broadly similar in how they perceive these attributes as important, although parents are notably more likely to be more concerned about protein source. More child-friendly snack bar brands have been transparent about such nutritional information, in their efforts to assure parents.

PARENTAL CONCERNS

75%

of US parents agree they are more concerned with the healthfulness of their children's diet than with their own



Kellogg's Nutri-Grain Kids Awesome Apple Soft Baked Mini Bars have been repackaged featuring a free book promotion in partnership with Feeding Reeding.



Organics Happy Kid Apple & Cinnamon Fruit & Oat Bar is a USDA organic product and is made using quality ingredients that burst with flavor like real organic fruits and whole grain oats and is described as an on-the-go full of chewy goodness snack that fuels kids.



This Saves Lives Kids Elephant Apple Crisp Bars are now available. The kosher-certified product contains a combined full serving of fruits and veggies and is free from peanut, nut, gluten, dairy, soy, egg, fish, shellfish or GMOs.



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Environmental efforts go beyond ‘low-hanging fruit’ ideas

US-based and Gen Z-founded *Impact Snacks* rolled out a range of carbon-positive plant-based superfood bars that come in 100% home-compostable bioplastic.



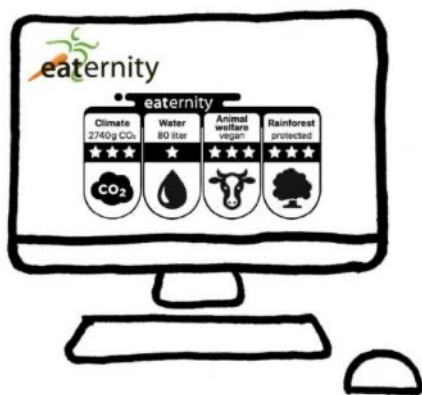
Bee-friendly almonds

KIND announced its commitment to become the first snack company to exclusively source its almonds from bee-friendly farmland across the globe by 2025 (US).



Upcycled papaya waste

Arla Foods Ingredients embarked on a project with GAIN to develop an affordable and nutritious snack – a dried fruit protein bar based on papaya pulp, milk and whey – specifically targeted at Ethiopia’s low-income consumers.



Together with the Eternity Institute from Switzerland, Berlin-based VeganZ made it its mission to set a new future standard for transparency in food and drink production.



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Moving towards more adventurous format innovation

The snack bar category has witnessed a spate of 'miniature' shapes such as minis, bites, balls, squares, cubes, clusters and sticks. Falling into a similar market segment and providing easier portion/calorie control as well, 'thins' are expected to resonate with the needs of health-conscious consumers who are on the lookout for permissible indulgences.

For example, in the chocolate space, **68%** of category eaters/buyers in the UK would rather have a small amount of regular chocolate than a larger amount of low-sugar chocolate, while **62%** claim that choosing smaller bars/packs of chocolate helps them limit how much they eat.



Clif Bar Thins Chocolate Peanut Brownie Thin & Crispy Snack Bars are made with whole ingredients including organic oats.



GNC Total Lean Girl Scouts Thin Mints Flavored Layered Lean Bar is described as a hunger-satisfying, high protein, convenient and delicious snack bar for lean muscle support.



Bark Thins Dark Chocolate Clusters are now available. The kosher certified snacking chocolate comprises fairtrade certified ingredients including almonds, toasted oats, blueberries and cranberries