SNACK ATTACK!
CREATING MORE POWERFUL PACKAGING TO LEVERAGE CONSUMER SNACKING TRENDS
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CONSUMERS’ BUSY LIFESTYLES ARE REDEFINING PERCEPTIONS OF WHAT A MEAL IS TODAY

You don’t have to be in the food industry to realize that snacking is much more than a consumer passion. It’s changing the way we look at meals.

A Multi-Billion Dollar Industry

Consumers worldwide spent $147 billion on snack foods in 2015.¹ And there’s a good chance you are among these snackers if you live in the United States. According to Mintel, 94 percent of adults in the U.S. snack at least once a day.²

In addition, 50 percent of these snackers enjoy a between-meal treat two to three times a day.³

Lifestyle Shifts Drive Diets

It’s clear that snacking is not so much a trend as a new healthy lifestyle for millions of people across the globe. Experts note that consumers are simply too time-stretched—with work, recreation and other commitments—to sit down for the traditional breakfast, lunch and dinner meals like they did ten or twenty years ago.

In this eBook, we explore the snacking phenomenon and its impact on packaging. Understanding why people snack and how they access their favorite between-meal foods are key factors in designing bold, consumer-friendly packaging that keeps them coming back for more.

¹ Mintel; ², ³ Mintel: Study on Snacking Trends, 2014
SNACKING AS A MEAL REPLACEMENT

With consumers more active and more mobile than any other time in history, it’s no surprise that traditional sit-down family meals are increasingly replaced by a quick snack on the go. Whether it’s grabbing an energy bar on the way to yoga class or eating a bag of chips on the commuter rail after a late night in the office, consumers simply don’t have the time they once did to sit down and enjoy three square meals every day.

Consumers Move to More, Smaller Meals

A full 45 percent of respondents to a recent survey reported that they eat snacks as meal replacements. It is important to note they do not view snacks as meal supplements— but as full-fledged meals. Studies show that a growing number of people has shifted from three traditional large meals to five small meals per day.

The implications of this behavioral shift mean that while packaging must whet consumer appetites for new flavors and food varieties, food marketers need to deliver at least some of the nutrition missing from the traditional sit-down meal. Packaging also plays a key role in minimizing preparation and clean-up.

TOP 10 FAVORITE SNACKS IN THE UNITED STATES

» Chips/crisps 63%
» Chocolate 59%
» Cheese 58%
» Cookies/biscuits 56%
» Fresh fruit 55%
» Bread/sandwich 48%
» Crackers/crisp breads 48%
» Veggies 44%
» Peanut butter 44%
» Popcorn 43%

Source: Nielsen Global Snacking Survey, q1 2014
Nielsen, Global consumers nibble, nosh and snack their way to big sales – Oct 1, 2014

FOOD FOR THOUGHT:
CONNECTING TO YOUR CONSUMER

Packaging professionals are taking a cue from Madison Avenue when it comes to marketing new, more customer-friendly snacking formats. Experts often cite the following snacking motivators:

1. Convenience
2. Taste and flavor
3. Better for you

Whenever products can appeal to these high-level needs, marketers can command a premium price. The same is true for the snacking industry. Package design that satisfies these drivers can truly change the game when it comes to higher profit margins.

Source: Mintel, April 2015
CAPTURING MORE FLAVORS THROUGH PACKAGE DESIGN

As audience tastes become more sophisticated—particularly among the Millennial generation—the demands on packaging increase. Instead of a simple bag of chips, consumers are today seeking various flavor combinations in one convenient on-the-go package.

**Food Pairings Gain Traction**

Packaging that allows snacking consumers to pair separate ingredients to fit their specific tastes are no longer considered novel or cutting edge. They’re anticipated in the marketplace.

In fact, formats that offer multiple flavor varieties are most appealing to “super snackers” (defined as people who snack 4+ times per day). The good news is that the possibilities for interesting package formats and designs are vast, and the right idea for pairing ingredients can impact sales overnight.

**WHAT’S WORKING FOR SNACK PAIRINGS**

*Multi-compartment packages* allow consumers to pair food for a combination of flavors in one convenient, flexible or rigid on-the-go package.
FINDING THE CONNECTION BETWEEN MEALS AND SNACKS

With so many consumers replacing meals with snacking, a key concern revolves around the snack’s ability to eliminate (or at least diminish) hunger. Food companies must now deliver snacks that help consumers stay full and energized between meals. Increasingly, snacks like cheese, energy bars and jerky feature high-protein claims so consumers can “fuel up” whenever—and wherever—they please.

Protein Snacking Part of New Diet Trends

What’s more, the trend for high-protein diets has many leading packaged goods companies seeking new and creative ways to deliver snack products that highlight this nutritional component. Packaging that pairs a protein with other salty snack favorites or fruit spreads range from rigid trays with flexible lidding to multi-sectional units that make combining ingredients easier for the consumer.
FOOD FOR THOUGHT: CAPTURING NEW GROWTH

As consumers turn to more active lifestyles, forward-thinking food companies are turning to new package formats to keep pace. Marketed as a protein-rich energy snack, Hormel® REV® Wraps combine meat and cheese in soft dough. The product’s single-portioned package format affords portability and convenience for on-the-go lifestyles. Using this new packaging, Hormel has reported nearly $30 million in sales in their first four months on the market.

Source: Mintel, June 2014
THE CONVENIENCE OF SNACKING

Watch television for a few minutes and you’ll quickly see commercials that appeal to consumers’ needs for simple, convenient snacks to tide them over between meals. From cereal bars that alleviate hunger pangs to protein snacks that deliver a jolt of energy anytime and anywhere, snacking is no longer considered a “treat” but is an expected part of our diets.

Convenience is typically defined in three ways: preparation, portability and portion control. Packaging plays a critical role in delivering all three.

**Preparation**

Preparation is the consumer’s ability to easily serve the snack. This includes spreading or dipping one ingredient into another (e.g., veggies and dip), or simply sharing with others without making a mess or causing undue waste.

**Portability**

Portability is the snack’s ability to safely and securely go anywhere the consumer goes. Today, that could mean providing a quick meal on a hiking trail or a bite between meetings in a busy work environment.

**Portion Control**

Portion control is critical for consumers who do not want to overindulge or who seek to keep the food item fresh to enjoy again and again—such as trail mix or cheese snacks.

Let’s take a look at how single-snack packaging and larger, reclosable packaging both play key roles in ensuring convenience for snacking consumers.

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**SNACKING FREQUENCY HAS INCREASED OVER THE LAST 5 YEARS**

3+ snack consumption per day has more than doubled since 2010

Source: 2014 Snacking Trends Snaxpo IRI Webinar

![Graph showing snack consumption frequency increase from 2010 to 2014](image)
HOW MANY TIMES PER DAY DO YOU EAT FOODS OR DRINKS SPECIFICALLY AS A SNACK?

Daily snacking frequency, by generation

- **Super Snackers** (4+ Times Per Day): Typically eat snacks as a meal replacement
- **Average Snackers** (2-3 Times Per Day): Typically snack between meals
- **Infrequent Snackers** (One Time Per Day): Snacks to satisfy a craving; More calorie conscious
- **Non-Snackers** (One Time Per Day): Snacks to satisfy a craving; More calorie conscious

January 2015; Source: Lightspeed GM/Mintel
The single-snack package has been synonymous with snacking for decades. But while it used to be the sole domain of salty snacks, today’s single-snack packaging covers the full gamut of food items—from fresh fruit and vegetables to nuts, cheeses and meats.

Creating a Value Perception

Single-snack packages offer both excellent portability and built-in portion control—and consumers will pay a premium for this built-in convenience. Consumers also perceive higher value from small batch offerings and unique flavors. What’s more, they are more willing to try a new product or flavor when it is presented in a small, single-portion serving. Single serve packs and portion control snacks are most appealing to average snackers (defined as people who snack 2-3 times per day).

Ready-to-eat, nutritious snacks are most valued by infrequent snackers, defined as people who snack one time per day.

Portion Size is Critical

The size of a snack package is key to capturing consumer attention:

- 60 percent of consumers cite portability as an important factor
- 27 percent say portion control is “very important”
- Women, in particular, say they do not want oversized portions

SNACK PRODUCTS THAT ARE SEEING A SALES BOOST*

* Percent of sales volume growth in retail and c-stores, 2013

- **+15.2%** Chocolate-covered salted snacks
- **+9.9%** Nutritional snacks + trail mixes
- **+4.6%** Dried meat snacks
- **+3.5%** Yogurt
- **+3.4%** Frozen handheld entrees
- **+2.2%** Natural cheese
- **+1.7%** Snack bars/ granola bars

Source: 2014 Snacking Trends; Snaxpo IRI Webinar
ENJOYING A SNACK, OVER AND OVER AGAIN

On the opposite end of the convenience spectrum from single-snack packs are large packages that afford ongoing consumption over an extended period of time. These add consumer value and convenience by including user-friendly features such as resealable strips and built-in zippers, or as rigid trays with reclosable lids that permit frequent opening and closing. This makes portion control and preparation simple and intuitive.

More People Eat Alone

The ability to store larger quantities of snack foods over time while ensuring freshness and taste is also critical when you consider that today, 47 percent of food occasions are spent eating alone.\(^8\) For these solitary snackers, smart packaging plays a vital role in minimizing food waste and stretching their grocery dollars.

Sharing An Indulgent Experience

Finally, larger packs that offer resealability are prized by consumers who like the idea of sharing an experience, particularly around indulgent foods like candy.

8. The Hartman Group; “Modern Eating: Cultural Roots, Daily Behaviors”
FOOD FOR THOUGHT: ADDING MORE VALUE

Meats and cheeses aren’t the only protein-rich snacks to benefit from new packaging formats that appeal to on-the-go consumers. Planters recently introduced individual pouches designed for freshness and convenience. These pouches complement the company’s traditional canister with one key difference—going from the canister to an individual snack portion increased the price per ounce by a full 30%. In 104 weeks on the shelf, Planters reported over $20 million in sales.

Source: Mintel; Walmart.com 2015
Just as traditional fast food restaurants are supplementing burgers and fries with healthier fare like garden salads and fruit cups, snack choices now match the healthier eating habits of today’s consumers.

**Children Drive Healthy Snacks**

Sixty percent of snackers wish for more healthy snack options, including 70 percent of households with children. Consumers see the need for better-for-you (BFY) foods that offer convenient packages. A full one-third of snackers agree that there are not enough conveniently-packaged snacks including individual portions or resealable packages. Once again, this percentage is even higher among households with children (42 percent).

**Affordability Always a Factor**

According to Mintel, while consumers may be willing to pay a premium for healthier snacks in convenient formats, snack providers must “strike a balance between convenience and affordability, knowing the importance many consumers, especially younger consumers, place on affordable snacks.”

A big perception that consumers have about healthier snacking is that they are eating foods that are both nutritionally enriched and fresher, too. This is a key area where packaging can play a larger role.
Today, both consumers and the channel are demanding more shelf-stable products than ever before. For packaging professionals, this demand drives growth in barrier films and aseptic technology.

**New Packaging Technologies are Key**

Freshness barriers and new types of seals and liners are changing the expectations for snack freshness, particularly in the refrigerator. And as meats, fruits, vegetables and cheeses continue to flourish as go-to snacking options, keeping these perishables safer over a longer period of time will become key priorities for snack manufacturers.

Snack packaging with increased visibility, such as transparent films to allow consumers to visually confirm freshness, will also play a key role in how audiences perceive value.
MORE PROFITABLE SNACK PACKAGING STARTS TODAY

Are you ready to gain more market share in the expanding snacking market? Bemis offers more than flexible and rigid packaging. We have the market insights and creative ideas that can help you capitalize on today’s emerging trends. Take the next steps today:

1. **Find a better way to boost consumer demand.** Talk to a Bemis packaging expert to connect global insights and on-the-pulse consumer trends to spark creativity.

2. **Accelerate your speed to market.** Create a physical or virtual prototype with experts that will help you bring the right product to market.

**Bemis is here to help—contact us today!**