



INNOVA MARKET INSIGHTS

## Bars Bring Performance and Indulgence for All

*By Innova Market Insights*

The number of global snack and cereal bar launches recorded by Innova Market Insights has grown by more than 80 percent over a five-year period, reflecting the rising demand for convenient, nutritious snacks and meal replacements, as well as the growing variety of formats, ingredients and target markets available.<sup>1</sup>

According to Lu Ann Williams, Director of Innovation at Innova Market Insights, “One of the key drivers in the snack and cereal bar market globally is a healthy image and, despite periodic concerns over how healthy the products actually are, there is ongoing emphasis on various healthy attributes.” Over 82 percent of the bar launches recorded by Innova Market Insights had a health positioning of some kind, rising to well over 90 percent in the US.<sup>1</sup>

Concerns over clean labels continue to lead, with 27 percent of launches positioned on a natural and/or additive-/preservative-free platform, rising to over 36 percent if organic products are also included.<sup>1</sup> There have been rising levels of interest in protein content, however, reflecting current trends in the food and drinks market as a whole. Nearly 26 percent of global launches used a high-in-protein or source-of-protein positioning.<sup>1</sup> The performance bar market, where products traditionally tend to feature protein, is also strong, with over one-fifth of launches featuring a sports/recovery or energy/alertness positioning.<sup>1</sup>

The most notable development in protein bars is their move from a specialty product for endurance and performance athletes to more mainstream positioning. In the broader market, consumers look to their potential in terms of benefits such as satiety, weight management, improved muscle mass and increased energy. Additions to the US market have included Clif Kid Zbar Protein, Strong & Kind from KIND Healthy Snacks and Lean Protein & Fiber Bars from thinkThin. This trend is also now starting to develop in Europe, where recent UK bar launches have included Eat Natural’s Protein Packed bar, targeted at active consumers.

Compared to 2013, the Innova Database tracked 47 percent more protein bars globally in 2014 (to date) that included almonds.<sup>1</sup> Most of these have been tracked in the US, but protein bars containing almonds have shown growth in Asia and Western Europe as well.<sup>1</sup> Most of these launches focus on weight management and satiety, with notable launches coming from Kellogg’s protein meal bars and Thinkthin with its Lean Protein & Fiber bar. Additionally, the more targeted brands such as Quest bar and Met Rx include almonds in their high protein bars for the sports segment. Finally, high protein bars are increasingly targeting the active lifestyle consumer that needs the energy to keep them going throughout the day. 9bar is one of the brands in this space that has a breakfast bar made with seeds and nuts such as sesame, pumpkin, hemp and almonds.

Other health claims featured strongly in the cereal bars market include gluten-free, high-in-/source-of-fiber and low and light (including low-sugar, low-fat and/or low-calorie). Compared to full year 2013, in 2014 to date there have already been 29 percent more product launches tracked around claiming high fiber using nuts.<sup>1</sup> Royal Wessanen, a well-known player in the organic and natural food market in Europe, focuses on using pure ingredients and explains that recent bar launches with almonds “are naturally rich in fiber and unsaturated fatty acids.”<sup>1</sup>

As well as this focus on healthy options, there is also a demand for indulgence and novelty. Consumers are looking for new textures and flavors as well as the use of indulgent ingredients such as fruit, nuts and chocolate. Nearly half of cereal bar launches feature fruit, led by berries/summer fruits, while over 27 percent feature nuts, led by almonds with 11 percent and peanuts with just under seven percent.<sup>1</sup>

Coconut is a great partner for almonds because of its popularity in recent years for its health benefits and sweet flavour that works well with nuts in general. Mainstream brands have almond and coconut combinations in recent NPD activity. For example, Nature Valley, Clif bar and Kind as well as more targeted brands such as Quest bar and Larabar. On an indulgence platform, the crunchy texture of almonds is often emphasized in combination with indulgent flavors like chocolate or red fruits. Caramel, honey and dates are the perfect partners for almonds and they are in the top 10 flavors for global cereal launches tracked with almonds. Well-known brands have launched honey and almond varieties in 2014, including Jordans and Kashi.

In Continental Europe, the market is much less developed than in the US and is dominated by more traditional muesli bars, although the range of flavors and added ingredients is growing rapidly. Schwartau's Corny, the leading muesli bar in Germany, now has Classic, Free, Nussvoll (Full of nuts) and Milch (milk) sub-ranges as well as its new Flakes and Crunch options. They are also developing its range in Spain and Italy under the Hero Muesly name. A sweet and savory variant was added to the Spanish line-up under the Muesly Energia Dulce y Salado name and premium indulgent Almond & White Chocolate and Peanut & Milk Chocolate variants were added to the Italian range under the Muesly Supreme name.

The high protein angle is leading in North America (44 percent of high protein bars with almonds) but Asia is seeing high launch activity on this platform as well (24 percent of launches since January 2013).<sup>1</sup> "Free from" claims (allergen friendly and gluten free) are trends in snack and cereal bars in most regions except for the Middle East which focuses more on fiber content and energy claims (26 percent of bar launches tracked).<sup>1</sup> Latin America still shows high launch activity around the "no trans fats" claim, which is found on 32 percent of cereal launches with almonds since January 2013.<sup>1</sup> Positioning around satiety has great consumer appeal and an increasing number of launches are observed positioning around fiber, protein and their positive effect on satiety. Most of these launches are tracked in North America since satiety claims on protein are not allowed in Europe.

Williams concludes that "The cereal bars market seems set for further growth, with particular potential in less established markets outside North America. Ongoing interest in convenient, nutritious, indulgent snacks suitable for consumption on the go is set to drive the market forward as existing and new need states and consumption occasions are targeted."

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*Innova Market Insights is a market research firm based in Duiven, The Netherlands.*

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References:

1. 2014 Innova Database, Innova Market Insights.
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