

SNAC International is pleased to present the latest issue of SNAC World, SNAC International's biannual member magazine published in partnership with Sosland Publishing.

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official state of the

INDUSTRY

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SNAC WORLD SPECIAL EDITION 2021

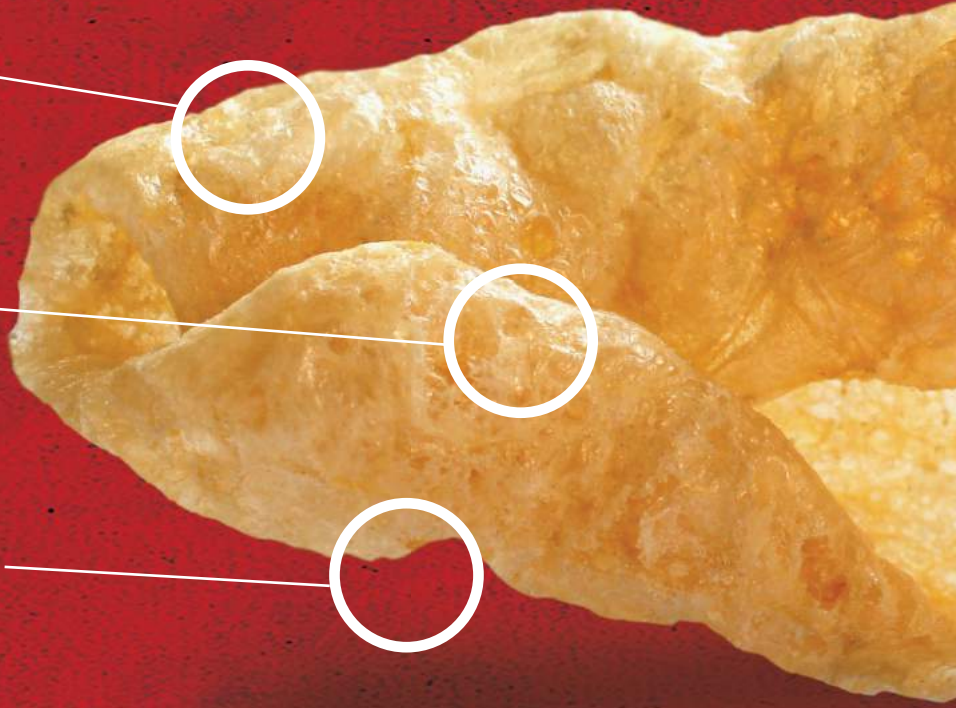


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Our Founders:
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1955 -----

Founded by
John Rudolph.

1957 -----

Mary Rudolph creates
secret pork rind recipe.

1982 -----

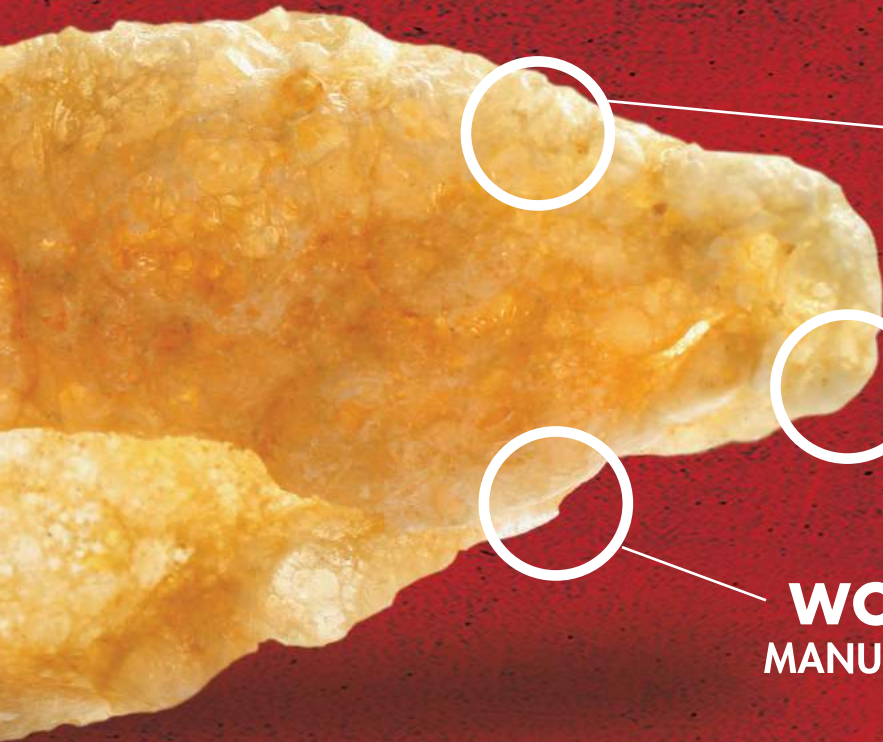
Rudolph Foods begins
making cracklins.

1989 -----

Lima, OH named the "Pork
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1991-94

Expansion into California, Texas, Mexico, and Central America.

2010

We establish Pork Rind Appreciation Day!

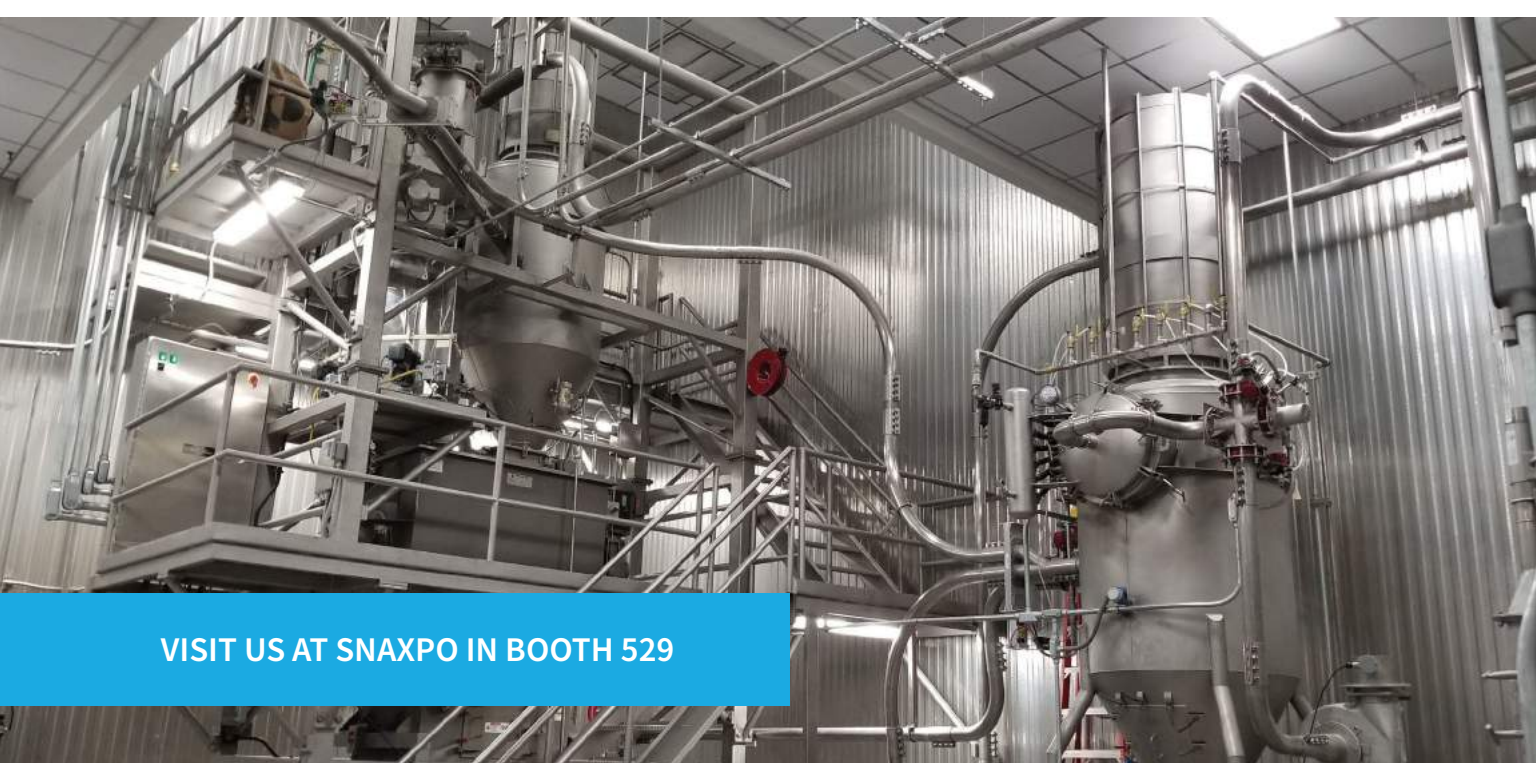
2014

Southern Recipe Small Batch is launched.

2021

Innovations in bold snacks continue.





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CONTENTS

STATE OF THE INDUSTRY ISSUE

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08

STEPPING UP TO THE PLATE

Snack producers position themselves to knock it out of the park as the nation reopens.

17

INNOVATIVE PARTNERSHIPS

Emerging snack companies weathered the pandemic with quick pivots and adaptability.

23

FLAVORS THAT SIZZLE

Hot, international, mashups and more are trending in the snack aisles.

31

2021 STATE OF THE INDUSTRY

A comprehensive report on industry trends, sales data and new products.

32 Other Salted Snacks

34 Potato Chips

36 Tortilla Chips

38 Other Snacks

40 Snack Mixes

42 Pretzels

44 Crackers

48 Cookies

50 Bars

52 Corn Snacks

54 Nuts and Seeds

56 Cheese Snacks

58 Pork Rinds

60 Meat Snacks

62 Popcorn

DEPARTMENTS

06 Letter from SNAC

64 Products & Services

66 Advertisers' Index

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EYES TOWARD THE FUTURE

My first thought as I reflected on the topic for this letter was to share the many creative ways the snack industry and SNAC International adapted to meet the challenges of COVID-19. Then I re-read my letter in last year's State of the Industry report to be reminded that I did just that one year ago, when we were a mere 6 months into the pandemic. Funny? Not so much.

No more looking back, all eyes are on the future. And the future has big things in store for SNAC with the greatly anticipated launch of SNX — an all-new industry forum that will focus on education and collaboration. SNX will be held March 27-29, 2022, in the hills overlooking Phoenix, a beautiful setting at the perfect time of year to spark creativity and imagination. Going forward, SNX will be held every other year in rotation with SNAXPO, our well-known vertically integrated supply chain exhibition, next slated for March 2023 in Orlando.

The concept for SNX grew out of a collaborative year-long effort between SNAC Associate and Business Members asking, "How can we create a high-engagement, high ROI event convening outside of the traditional trade show setting?" The idea was to completely reinvent the "smaller" SNAXPO that historically does not feature large equipment displays. And reinvent they did! SNX breaks the traditional trade association meeting mode by fea-

turing an unprecedented combination of networking and education opportunities.

So, what exactly is SNX? SNX is a forum featuring three structured elements, each with dedicated time on the agenda: Supplier Suites, an Experience Zone and an Education Arena. Seven hours of the two-day meeting are reserved solely for 1:1 meetings in Supplier Suites for in-depth, private conversations between snack producers and their vendors. The Experience Zone will be composed of five areas that will lead attendees through the snack manufacturing process, beginning with raw materials and ending with finished product. Each zone will feature supplier kiosks, pop-up education and hands-on engagement areas. Six hours of SNX is dedicated to the Education Zone.

Finally, the Education Arena will feature speakers on the most crucial topics facing the industry from workforce to sustainability. From the opening keynote remarks to the grand finale featuring the return of SNAC Tank, in which the most innovative startup companies will compete for cash prizes and mentoring from industry experts, the Education Arena will inspire and inform attendees on what is new and next for the snack industry.

And for those wondering how to pronounce SNX ... it sounds just like "snacks" — don't worry, you'll get the hang of it!



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President & CEO
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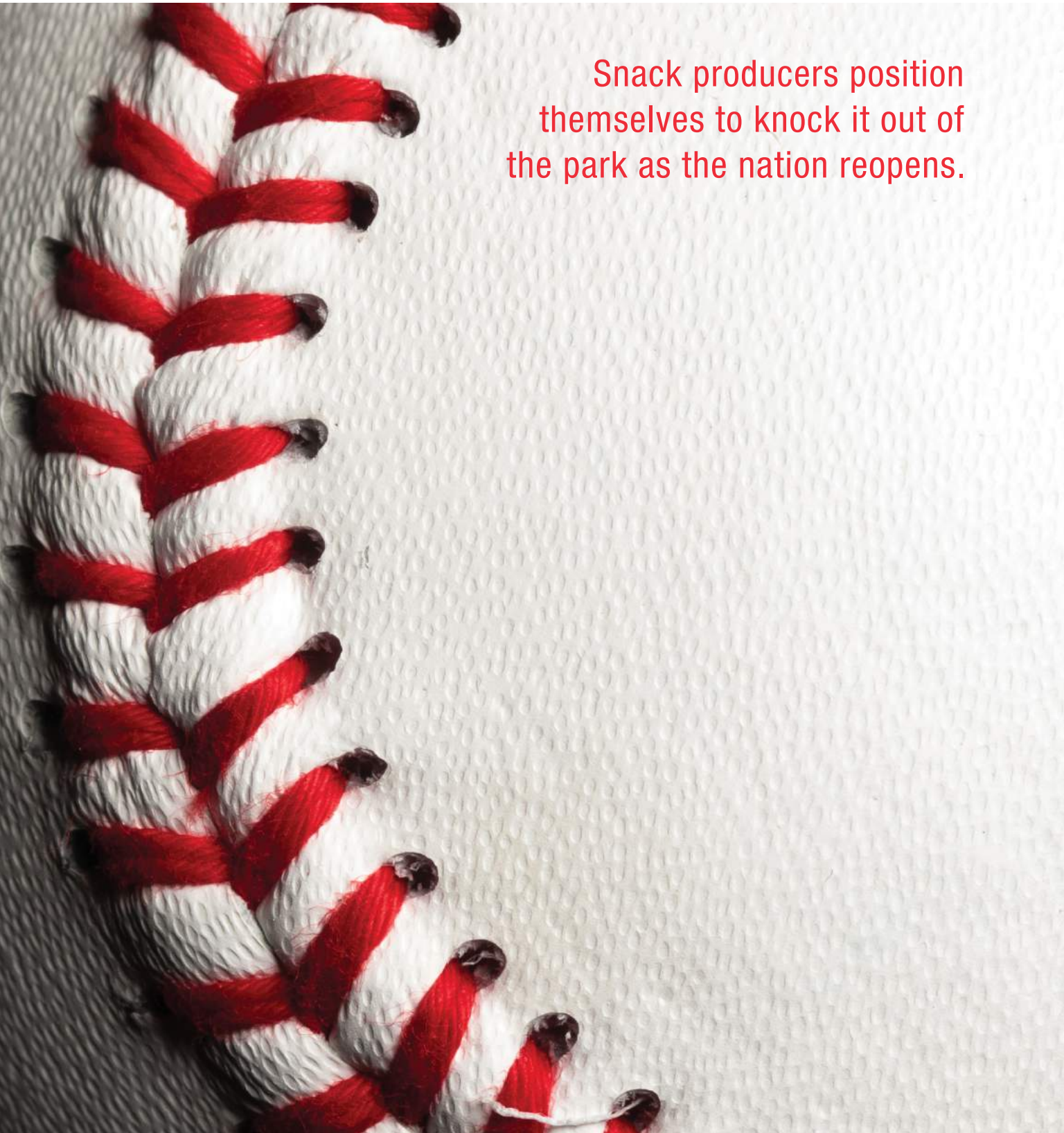


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BÜHLER

STEPPING UP TO THE PLATE

Snack producers position themselves to knock it out of the park as the nation reopens.



◆ by Dan Malovany

Let there be no doubt: 2020 was an unprecedented year, but one part of America's lifestyle didn't change. Despite the upheaval caused by the coronavirus (COVID-19) pandemic, snacking remained strong. Certainly, it went in different directions as households turned to variety packs and family-sized bags purchased online in greater numbers. Snacking also saw increased frequency during mornings and afternoons from remote offices and home schooling and surged in the evenings as movie nights transformed into regular affairs.

"Consumers are snacking more than ever," observed Leslie Vesper, vice president of marketing, innovation, Plano, Texas-based Frito-Lay. "At the onset of the pandemic, there was a dramatic increase in snacking as consumers were purchasing essentials in bulk and stocking up their pantries with their favorite snacks. As the pandemic continued, consumers were spending more time at home, snacking during new dayparts and seeking more variety in their snacks in order to satisfy the needs of everyone in their households. Now, more than a year later, we're seeing many of these habits stick, and as people begin to gather again, snacks have returned as the cornerstone of these social occasions."

Overall, IRI reported that salty snacks sales rose a hefty 8.2% to \$22.9 billion for the 52 weeks ending May 16, 2021. Some categories such as other salted snacks, meat snacks and ready-to-eat popcorn jumped at double-digit rates, while potato chips, tortilla chips, cheese snacks, corn snacks, pretzels and pork rinds experienced solid single-digit growth.

That's impressive considering that the latest IRI data includes year-over-year comparisons to the first part of the pandemic when droves of at-home consumers flocked to stock up, explained Justin Spannuth, vice president and chief operating officer, Unique Pretzel Bakery, the Reading, Pa.-based company that recently rebranded itself as Unique Snacks.

"The snack industry has seen some significant fluctuations in the last year, and some sales num-

bers will be tough to beat in 2021," he said. "It was amazing to see that when panic set in, comfort brands were the first to be bought as experimenting with new products was not on many people's agendas. As the weeks went on, groceries were still in high demand with many restaurants closed, but the panic started to wane. This is when smaller brands saw their solid sales increase."

As time moves on, Mr. Spannuth added, the outlook appears bright for niche brands as well.

"Businesses and restaurants are reopening, and while snack sales are reducing from 2020's all-time highs, the brands with quality like Unique Snacks are seeing that our sales drop-off percentage is far lower than the category," he explained. "This is evidence of consumer retention that we credit to product quality."

The outlook for the remainder of this year and heading into next looks bright for several reasons.

"What we found is that we think there will be a 3% to 4% pricing gain, which will help core snacks gain a 3% to 4% dollar sales increase," said Sally Lyons Wyatt, executive vice president and practice leader, IRI, during an IRI webinar on the state of the snack industry in April. "You've got to remember that a lot of projections [in 2021] are for declines in food and beverage because of the strong year we had in 2020. So, the fact that we're predicting snacks to not only grow 3% to 4% — and yes, pricing is going to play a part of that — is a big deal."

Valerie Oswald, president, Campbell Snacks, Camden, NJ, suggested that snack companies survived — even thrived — by quickly reacting to market trends.

"If we learned one thing from the last year and the COVID-19 pandemic, it's that consumer demands can shift rapidly," she said. "As a result, I think the greatest opportunity in snacking is our agility. Baking and snacking companies need to be fast and flexible now more than ever."

TARGETING NEW MEGA TRENDS

Ms. Lyons Wyatt said a combination of wellness, permissible indulgences like baked chips and fully



loaded indulgences such as fried kettle chips are driving snack sales. Snack makers are engaging consumers with personalized solutions like new flavors and convenience-pack sizes and through digital and social media to create unique experiences to attract, retain and gain consumers. Likewise, she encouraged companies to keep engaging consumers to maintain growth ahead.

"Mobility is going to be the trigger," she added.

Mr. Spannuth pointed out that many trends evolved during the past year.

"If you aren't saying sustainability in your sleep, you aren't looking for innovation hard enough," he noted. "Packaging and ingredients are both big areas of focus for brands and suppliers right now. As the industry has explored just about every crevice of the better-for-you category, I believe the next level, better-for-earth products will be flooding the market soon."

Additionally, several snack manufacturers responded to the pandemic by repositioning their product portfolios for the economic rebound this year. That ended up being a very prescient move.

"When COVID hit, we started to analyze our product lines as well as how we operate internally," said Brian Smenos, vice president of marketing, Snak King, City of Industry, Calif. "We discovered areas at our company where we may have been inefficient and did some internal housecleaning. We also automated our plants at the same time, and that led to culling of the SKUs, and looking for areas to standardize bag sizes and former sizes."

Most recently, many companies — not only in the snack industry — have realized that the reopening of the nation isn't going to happen as quickly as flicking on a light switch. Opportunity abounds for new products, but the industry also faces challenges.

"As we look at what 2022 is going to be, consumers are going to give us permission to move ahead with so

"The smarter folks were thinking ahead. I'm pretty sure we'll see a ridiculous flurry of new products in the second half of 2021."

Rob Sarlls, Wyandot Snacks and SNAC International chair

many unique products and projects," said Mark Singleton, vice president of sales and marketing, Rudolph Foods, Lima, Ohio. "From the reality of supply chain and operations logistics, I'm really wondering what the industry, the trade, what everybody is going to be able to deliver. There are lots of headwinds that we've never particularly faced before. It's going to be a super interesting year."

Labor remains extremely tight, and the workforce gap seems wider than ever while skyrocketing commodities and oil prices are putting pressure on margins. Some businesses, however, are discovering those recent investments in their operations are paying off.

"As the economy has come roaring back and restaurants are reopening, that whole supply chain is taxed as we have rebounded," Mr. Smenos said. "It's an unprecedented economic situation."

For other companies, adjusting operations is a response to a constantly changing market.

"In a year where significant inflation and cost pressures are impacting our product development, we all have to mitigate and manage our innovation in a broader context. In this cost-pressured environment, innovation has to



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- ▶ PUFFED GRAINS





occur not only in new product development but, as importantly, has to be defined by how we manage the processes by which we get these products to market,” noted Matt Colford, executive director of marketing and strategic selling, Old Dutch Foods, Roseville, Minn.

“For me,” he added, “our focus on innovation isn’t just on new flavors, but rather it’s about asking how we innovate our entire process to be more efficient and cost effective in the way we get to market. Innovation has to occur throughout the entire system.”

Greg Pearson, chief executive officer, Pretzels Inc., Bluffton, Ind., emphasized that the overall industry is now operating off a sturdy base.

“There has been tremendous growth across many snack segments, so snack producers need to keep innovating as they have over the last few years and meet new demands to bring new and exciting things to consumers,” he said.

Bill Blubaugh, senior vice president, marketing, Utz Brands, observed that the snack producer is focusing on maintaining those customers it picked up over the past year and getting new ones to try its products. Convenience store and food-service traffic, he added, is returning this year.

“The fact that our products and brands are great companions to at-home eating occasions,” he said. “As long as those behavior changes stick, we should be able to see pretty solid demand in the salty snack category.”

For Utz Brands, 2020 was a transformational year when the Hanover, Pa.-based snack producer went public with the “UTZ” ticker on the New York Stock Exchange.

During the past year, Utz has made three acquisitions, including H.K. Anderson pretzels, On The Border tortilla chips, and C.J. Vitners potato chips and snacks. The company expanded its national footprint of the Utz and other power brands while strengthening its position in specific markets through its highly popular, regional foundation brands. These acquisitions will collectively enhance its geographic footprint and market penetration of its brands, according to Dylan Lisette, CEO of Utz Brands, in a recent analysts’ call.

This year, Utz is celebrating its 100th Anniversary in the snack industry, as is Wise Foods, Berwick, Pa.

REEVALUATING MARKET EXPECTATIONS

Innovation took a hit last year as retailers struggled to keep shelves full and companies of all sizes curtailed new products. In fact, Ms. Lyons Wyatt said, the industry saw the number of new products decline by double-digits in 2020 versus the average of the previous three years.

However, that lull isn’t anything compared with the Great Recession in 2008 when much of new product innovation disappeared.

“We didn’t see that [collapse] in 2020,” said Lynn Dornblaser, director of innovation and insight at Mintel, speaking at a recent SNAC International webinar. “What we saw was that temporary hold on the part of retailers.”

With R&D departments working remotely, snack producers found the new product process had been disrupted, but it’s now returning to normal.



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"You could send them samples, but the collaborative juices weren't there. Projects got postponed," Mr. Smenos said. "There is a lot of playing catch-up in getting new products out there. From our internal standpoint, there were projects put on pause that we're now pretty excited about making."

He especially looks for the return of trade shows.

"Those events are so integral with people in the food industry. When people get together and ideas are shared across different platforms, things happen," Mr. Smenos said. "It's an engine for new business and new product innovation. It's like that secret sauce that everyone was missing."

Overall, Ms. Dornblaser noted, Mintel classifies new products as either "true innovation" that comes from new brands and often startup companies, or as "product renovation," which includes line extensions, new varieties, reformulation or new packaging from existing lines, established brands and larger producers. Most snacks fall into the "product renovation" classification, but she expected the industry might see more "true innovation" from challenger brands as more new products hit the shelves over the next year.

Rob Sarlls, president and CEO of Wyandot Snacks, Marion, Ohio, anticipates that the pipeline of new products could surge later this year.

"The smarter folks were thinking ahead," said Mr. Sarlls, current chair of SNAC International. "I'm pretty sure we'll see a ridiculous flurry of new prod-

ucts in the second half of 2021. People were getting things ready to roll and waiting for prime time to come back. I think there will be not just a bounce back in terms of new product introductions, but like the rest of the economy, way over the top. That will give consumers choices and more fun, which is good. We need to bring fun back to the store and more adventuring while eating."

IMPULSE VS. ONLINE PURCHASES

Another trend, the digital experience, continues to blossom. IRI reported that online sales for the core snack market stole share last year, but brick-and-mortar experienced hefty increases as well.

However, snacks are such an impulse item that producers need to engage consumers differently to maximize online sales.

"Shoppers might snap snacks up at a convenience store without giving it a second thought," said Tom Vierhile, vice president of strategic insights, North America, Innova Market Insights. "Online shopping isn't necessarily as conducive to this type of behavior as the format is not as engaging as being able to pick up and hold a product you are about to purchase."

Looking ahead, Mr. Sarlls said, snack producers need a digital approach that complements conventional merchandising and special displays that turbocharge sales in a brick-and-mortar establishment.

"It's becoming a permanent avenue, and one you can't ignore," he said. "If you don't have a social media strategy, you don't have a strategy. It has to be a part of what you're doing on the ground in the store. Digital has become too important, and the pandemic highlighted that. More dollars should be going to digital and social media, above and beyond whatever the trend was before the pandemic."

Another way to increase snack sales is through online initiatives that boost the number of eating occasions, whether it involves new dayparts or mealtime occasions. Ms. Vesper suggested integrating snacks into recipes. The Frito-Lay Snack Index survey found that last year 63% of Americans were cooking at home to stay entertained during COVID-19 but were hungry for more inspiration.

Knowing this, the company developed *more-smileswitheverybite.com*, a centralized hub of recipe inspiration integrating its brands into almost any eating occasion. Additionally, the company released "BON-APPE-CHEETOS: A Holiday Cookbook by Chester & Friends" last November.

"It featured inventive and delicious new recipes from Chester Cheetah and professional chefs," she

said. “The cookbook was pretty amazing — featuring everything you can imagine from appetizers, side dishes and entrees. It even had cocktails and desserts.”

Ms. Vesper pointed out that 50% of consumers reported they were snacking more on salty snacks between lunch and dinner compared to before the pandemic, and 44% said they were snacking more after dinner.

“As we begin to emerge from the pandemic, we do anticipate that these behaviors will stick, as we continue to see snacking grow,” she explained. “Consumers enjoying lunchtime at home emerged during the pandemic, and despite the country beginning to reopen, we’re continuing to see this behavior continue, which means continuing to lean on snacks as a part of that mealtime.”

Evenings are especially ripe for snacking.

“There is a great opportunity for snacks that are perfect for that evening or that late-night occasion when you had a tough day and you need to wind down,” Ms. Dornblaser said.

Or maybe manufacturers can position snacks for when consumers just want to relax. Mr. Spannuth said Unique Snacks is rolling out a “Better Together” fall promotion with Tröegs Independent Brewing that pairs selected craft beers with its signature pretzels. The promotion, which features

SNACK SALES PUT ON A STRONG PERFORMANCE

CATEGORY	DOLLAR SALES (in millions)	% CHANGE
Total Snacks	\$22,858.2	8.2%
Cookies	\$8,861.5	2.6%
Crackers	\$7,599.0	0.6%
Potato Chips	\$6,658.4	5.3%
Bars	\$5,430.4	-4.6%
Tortilla Chips	\$5,137.8	6.3%
Other Salted Snacks	\$4,847.0	14.8%
Nuts/Seeds/Corn Nuts	\$4,792.7	4.1%
Cheese Snacks	\$2,248.7	8.2%
RTE Popcorn	\$1,399.7	10.3%
Other Snacks	\$1,298.1	0.5%
Pretzels	\$1,180.7	7.3%
Corn Snacks	\$989.3	6.2%
Meat Snacks	\$976.2	23.5%
Snack Mixes	\$969.4	-1.0%
Pork Rinds	\$396.6	6.9%

Source: IRI for 52 weeks ending May 16, 2021



point-of-purchase displays identifying the various pairings, uses a QR code to enable consumers to shop and — in states that allow food and alcoholic beverage promotions — receive a rebate on the featured pairings.

Mr. Sarlls suggested further integrating snacks into the greater food and beverage market.

“Whether it’s a puffed snack, chip, popcorn or something else fun, we want to be there. We’d love to expand our horizons,” he said. “We are always excited to get an opportunity to expand into a different vertical product category outside of baking and snack or a new technology that does something cool.”

In these unprecedented times, companies need to integrate both traditional and unconventional approaches to the market to hit a home run in today’s new snack world. ♦

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INNOVATIVE PARTNERSHIPS

Emerging snack companies weathered the pandemic with quick pivots and adaptability.

◆ *by Charlotte Atchley*

Before the coronavirus (COVID-19) pandemic, the snack industry was in the midst of a shake-up. Barriers to entry for new business were at an all-time low. Venture capitalists were looking to invest in the next new snack, and emerging brands were redefining snacking with new formats, ingredients and mission statements. Even giant companies like PepsiCo, Purchase, NY, and Mondelez International, Chicago, took notice and snatched up new brands or started their own incubator programs to replicate the think tanks behind some of these snacks.

Then the pandemic cut off much of these startup snack businesses' support. Natural Products Expo West, a trade show that allows these small companies to get in front of major retailers, was canceled. In-store demos were put on hold indefinitely.

Retailers devoted more shelf space to core categories that were flying off the shelves, leaving little space — if any — for new products. Investment purse strings in Q2 of 2020 got tighter.

As society begins to emerge from the pandemic, there's more breathing room for innovation once again. And with a partnership with Emerge, SNAC International emerging brand members can find a path forward back into the black.

TAKING A STEP BACK

When looking at the pandemic from the startup perspective, things could have been a lot worse. Many brands were able to weather the storm even if companies were forced to pivot quickly and adapt.

"When I think about the characteristics of the teams who succeeded in this very uncertain time,

Education sessions by Emerge can help snack brands optimize their direct-to-consumer business via online platforms like Amazon.
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HOW TO GET INVOLVED WITH EMERGE

Utilizing the SNAC International — Emerge partnership, SNAC members identified as emerging brands can access one free year of membership with Emerge. This allows companies to take advantage of educational sessions, on-demand learning and networking to help scale their businesses.

“The goal is to not overwhelm the team with too many resources at once,” said Julie Pryor, chief executive officer of Emerge. “That’s why the membership is for 12 months, so we can prioritize resources and phase them in. This ensures that we can build a strong foundation and scale the company sustainably.”

Not only do members get access to the educational and networking opportunities, but there is also a public LinkedIn community — Emerge Learning and Networking Community — to help members stay current on industry news and trends, and where team celebrations are shared and amplified.

SNAC International members who aren’t emerging can also participate as a mentor. Mentors volunteer 10 to 12 hours each year to guide a member team through any challenges it may have. Mentors span all categories: ingredient suppliers, co-manufacturers, brand strategists, investors, distributors, sales management leaders, e-commerce gurus, CPG experts and more.

“We make mentor and peer member connections for each team that align with their business needs and challenges, so that ideally each connection enables teams to take the next step in reaching one of their growth goals,” Ms. Pryor said.

Industry leaders can also engage with the Emerge Network as a sponsor or affiliate partner. These engagement roles provide industry leaders with the opportunity to welcome each member team into the community and set up a consultation to review their business goals and challenges. Through partnerships with Emerge and mentoring, companies can actively guide and support emerging businesses to thrive and become enduring brands. Emerge will be exhibiting at SNAXPO in the “Emerge Hub” booth. For information on how to take advantage of the SNAC — Emerge partnership, contact David Walsh, SNAC vice president, membership and communications, at dwalsh@snacintl.org.

what comes to mind are the teams who made decisions to support how and where their core consumers were shopping, while keeping their bigger growth goals in mind,” said Julie Pryor, chief executive officer of Emerge. “They were able to be creative with their business strategies, pivot quickly and adjust as the year went on. They embraced the unknown and focused on being solutions-oriented.”

Much of that adaptation was around channels and innovation. As new products were put on hold and shelf space evaporated in favor of established brands, smaller companies looked to e-commerce as a place to build a following.

“Those companies that had commitments pre-pandemic for major distribution that were honored and could use social media to connect with consumers came out of 2020 stronger than expected,” said Rob Sarlls, CEO and president of Marion, Ohio-based Wyandot Snacks, which co-manufactures for some emerging brands as well as larger companies. “They did all the right things and were able to execute on what they already had in their plans.”

The companies he saw struggling were those that tried to do much of their work during the first half of 2020, whether that was to launch a new product or brand or raise capital.

“But time is the enemy when you’re trying to do something new. You want to get it out there. You want to hit the mark, get the splash, get excitement. If you didn’t get to first base, it’s kind of tough to go back to your group and say, ‘We had the right idea, just timing was rotten,’ ” he explained. “Some of those companies will come back, and some of them won’t.”

While companies trying to get off the ground in spring 2020 may have struggled the most, those who were innovating seemed to just put those plans on hold, from the viewpoint of Greg Pearson, CEO, Pretzels Inc., Bluffton, Ind., another co-manufacturer that works with these brands.

“There may have been a short-term disruption last spring, but beyond that, we saw brands continue to innovate, and consumers were hungry for it,” he said. “We saw some huge growth behind the disruptive brands last year.”

Much of that ability to keep innovating, said Karl Brown, president and founder of Hatboro, Pa.-based Pretzel Pete, can be attributed to the pandemic. Lack of travel gave everyone time to think.

“Everything slowed down, not in terms of our business but in regard to time,” he explained. “I wasn’t traveling for business; staff members weren’t taking vacations. We were all here operating the business. That allowed us time to reenergize our own brand and look at what we should be doing.”

And then there was also the pivot to online. While snack giants gobbled up shelf space, smaller companies turned to e-commerce and social media to keep up sales and consumer connection.



"We traditionally were selling to a lot of whole-salers, specialty stores and c-stores, and we had to transition," said Josh Monahan, owner of 1in6 Snacks, Raleigh, NC. "Now we sell a lot of products online on Amazon, other online platforms, even direct-to-consumer. Getting product out there is a bit different these days."

EMERGING WITH SUPPORT

All of this adaptation has been necessary for these brands to survive and, in some cases, thrive, but it all comes with a learning curve. SNAC

International's partnership with Emerge, which was forged in 2019, feels serendipitous with all the assistance these emerging or smaller companies needed as they navigated these strange market conditions.

Emerge is a community supported by FMI, the Food Industry Association, to help emerging brands become healthier trading partners and expand distribution. It's focused on education and networking, both of which provide smaller companies with the knowledge, guidance, connections and resources to make the quick adjustments the pandemic required.

Emerge pairs its member companies, like Jackson's Honest, Pretzel Pete and 1in6 Snacks, with mentors who are experts in many disciplines.
Jackson's Honest
Pretzel Pete
1in6



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As consumers filled their carts with old favorites, retailers dedicated more and more shelf space to bigger brands, forcing many emerging brands to pivot to e-commerce.

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“If you look at the three key pillars of SNAC International — education, advocacy and networking — there is a lot of synergy with our pillars, which are education, networking and championing emerging brands,” Ms. Pryor said. “The ways in which SNAC and Emerge have partnered is through shared education and tapping into each of our respective networks to connect our members to big-
 respect industry and networking opportunities.”

SNAC International’s rising star members have access to relevant educational content from Emerge as well as mentors across the CPG, grocery and retail industry. The community’s 100-plus mentors include independent and boutique brokers, investors, distributors, retailers, data service providers and a community of industry leaders across various subject matters.

Semi-monthly live, interactive education sessions are hosted by the mentor community and have included topics such as raising capital, developing an effective channel strategy, finding the right co-packer partner, selling successfully at Costco, de-mystifying brand strategy, and selling across Amazon and wholesale e-commerce marketplaces.

“One of the key adjustments teams had to make during the pandemic was that many of them were focused on selling mostly at retail,” Ms. Pryor said. “Brands had to shift, grow their brand experience online, and sell across e-commerce and direct-to-consumer, with a focus on their digital strategies. Emerge supported this shift by sharing

industry trends and shopper behaviors across categories as the pandemic unfolded, and by working with members of the mentor community to host education sessions to help teams rethink their channel strategies, identify the right channels for their brand and products, and generate traffic and sales across DTC, e-commerce and Amazon.

As a member of Emerge through the SNAC partnership last year, Pretzel Pete directly benefited from these educational opportunities. Mr. Brown said the company was struggling to gain traction on Amazon as it tried to move toward online sales.

“We didn’t understand Amazon, and we didn’t have the resources to devote to it,” he said.

After sitting in on an Emerge member presentation, he joined that company’s program to support Pretzel Pete’s day-to-day Amazon business.

Mr. Brown said the company also was able to participate in a pilot class on brand marketing at a discounted rate in exchange for feedback on the new course, which was beneficial as the business turned its focus to investing in its own brand.

“It was very eye-opening and helpful for me, and the timing was excellent as I was looking to invest and increase our brand reach and better position our marketing materials,” he said.

And the networking has been helpful as well. Recently, Mr. Brown discovered a platform for staff training through conversations with another business owner. After looking into it, he decided the platform was a good fit for Pretzel Pete.

“The world is changing very quickly, and for smaller manufacturers and brands, it is very difficult to keep up.”

Karl Brown, Pretzel Pete

“We’ve implemented it, and we’re getting it off the ground,” he said. “It was through an Emerge contact that we had further conversations with this other business owner, and now we’ve benefited from a back-of-house solution as well.”

Mr. Brown’s experience with the SNAC and Emerge partnership has been so beneficial, he renewed the company’s membership for another year. Without SNAC, he said he might not have known about Emerge and its resources.

“The world is changing very quickly, and for smaller manufacturers and brands, it is very difficult to keep up,” Mr. Brown said. “Julie is making avail-

able a roster of experts and mentors that we can draw upon.”

It’s a roster that 1in6 Snacks is hoping to draw upon in 2021 as it joined Emerge this year. After putting new products on hold for 2020, the company is looking at product launches for the future and expanding marketing efforts beyond social media. Mr. Monahan was drawn to the breadth of programming the community offers.

“I want to continue to grow as a business learner, just trying to learn something new every day,” he said.

The networking opportunities the Emerge community has to offer can help facilitate that goal.

“Making highly aligned business connections and networking is at the heart of Emerge,” she said.

“We offer the opportunity for teams to build trusted relationships with the right industry experts, as well as for teams to meet and learn from one another.

This allows teams to navigate the industry more confidently and reach their growth goals, which are shared values that SNAC and Emerge have.” ♦

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FLAVORS THAT SIZZLE



Hot, international, mashups and more are trending in the snack aisles.

♦ by Michelle Smith

Snack makers are branching out into a number of exciting new flavor trends. They are fulfilling consumers' quest for nostalgia, pursuing interesting flavor combinations and exploring new international alternatives.

The most popular trend is hotter than ever: Super hot, heat paired with lime, chili peppers and bold flavors were all mentioned by snack manufacturers. A stroll past any snack display at the grocery store confirms the truth: Consumers like their spice.

"The big direction in snacks right now is toward hotter and spicier flavors," said Tom Vierhile, vice president strategic insights, North America, Innova Market Insights. "Rolled tortilla chips — like Takis — are also a growing trend along with puffed snacks like popped water lily seeds. What seems to be changing is that spicy flavors are getting more specific by naming specific varietal peppers responsible for the heat and spice. We're seeing more launches featuring 'Hatch chili' as a flavor, for instance. Ghost pepper is another one to watch out for."

Several snack makers are watching this trend and expanding their offerings to meet consumer demand.

"Heat is certainly a trend that's spread across a

variety of categories," said Matt Colford, executive director of marketing and strategic selling at Old Dutch Foods, Roseville, Minn. "We've expanded that characteristic into several of our product segments including potato chips, tortilla chips, extruded categories and our newly launched indulgent pretzel category with strong out-of-the-gate results. So across all major segments, heat seems to be emerging. We recently launched our Rings O' Fire corn snacks as an extension of our Sour Cream and Onion Ring, and that's been very popular."

THE RIGHT MIX

Snack makers are focused not just on strong seasonings but also on pairing them with the right textures.

"Bold flavors — not just hot and spicy — but more complex, nuanced flavors," is a trend, said Valerie Oswalt, president of Camden, NJ-based Campbell Snacks. "Snacking is multi-sensorial — texture and flavor have to work together, and it has to be visually appealing. The design of our Snyder's of Hanover Twisted Pretzel Sticks is a great example of this."



Pairing flavors with the right base is crucial to success, agreed Justin Spannuth, vice president and chief operating officer for Unique Snacks, Reading, Pa.

"We have been looking at lots of different flavors, but many don't translate cross-category," he said. "That's why you don't see honey mustard tortilla chips or spicy lime pretzels."

Brands are also marrying the heat with some flavors from Mexico, including El Sabroso brands from Snak King, City of Industry, Calif.

"We're still seeing 'hot' flavor trends resonating," said Brian Smenos, vice president of marketing at Snak King. "Even the super, super hot flavors continue to ramp up. We're doing a lot of hot sauce with lime and some flavor mashups like a hot sauce with cheese on popcorn, which are fun items."

"Mashups are fantastic. ... They provide excitement in the categories that they connect."

Rob Sarlls, Wyandot Snacks

Crossovers like the partnership between El Sabroso line and Tapatio Hot Sauce offer a variety of spicy products. Mr. Smenos said that very hot flavors and authentic Mexican flavors resonate with young consumers. He added that the products are popular in several areas of the United States, including the South.

Latin American and other international flavors have caught on, especially with millennials and Generation Z, according to Mintel's "Trending Flavors and Ingredient Snacks" US report, released earlier this year.

"Latin, Asian and Middle Eastern cuisines have been gaining traction with differentiation taking place among sub-regions, and these international cuisines all deliver bold flavor profiles featuring sweet, spicy and heavily seasoned dishes," the report's executive summary said. "Curry, adobo, Baharat and kimchi are well positioned to find favor among young consumers looking to connect to other cultures through traditional, authentic flavors."

It's a trend snack makers say is likely to expand.

"In a year in which many people were eager to travel but could not due to the state of the world, we found that consumers 'traveled' via what was on their plates," said Leslie Vesper, vice president of marketing, innovation at Frito-Lay, Plano, Texas. "Incorporating favorite regional or global flavors into their snacks and meals allowed them to 'travel' without going anywhere at all. I think that this demand for such flavors will stick around."

Rudolph Foods, Lima, Ohio, likes to pursue the unexpected for its pork rind flavors. Its Southern Recipe Small Batch flavors include Kimchi BBQ and Pineapple Ancho Chile.

"Right now, I'm kind of fascinated with North Africa. There's not a lot of pork history there so anything we put on pork is going to be really different and something people hadn't tried before," said Mark Singleton, vice president of sales and marketing at Rudolph. "I'm also really continuing to look at Asian and pan-Asian flavors. There's a super Filipino history of pork, and there's a super Chinese history of pork, so we know we're going to come up with something there."

THE TASTE OF COMFORT

When snackers weren't seeking out exotic locales, they were sticking close to home and enjoying flavors from childhood. With all the doubt and fear bought on by the coronavirus (COVID-19) pandemic, many sought comfort in their snacks.

More than eight in 10 consumers ages 18 to 34 said they still enjoy the flavors of chips they ate during childhood, according to Lynn Dornblaser, director, innovation and insight for Mintel, in a recent SNAC International webinar on "The Future of Healthy Snacking."

And Mintel's "Trending Flavors" report said that "more than half of consumers sometimes prefer simple, basic flavors, which should act as a foundation for a snacking portfolio." The report urges companies to provide consumers with nuanced versions and premium upgrades of classic flavors.

That's exactly what Old Dutch has done with some of its tried-and-true favorites when it launches something new.

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ago, rather than looking at tertiary niche flavors, we've enacted a bit of a different tactic in flavor development for our consumers that we call signature fusion," Mr. Colford said. "It's taking our most popular and long-standing flavors and fusing them into a great-tasting combination that captures the best of both flavors. It started with the fusion of our Dill Pickle flavor, which has long been a favorite in our market especially with young consumers who have grown up loyal to our products, and of course our Sour Cream flavor that has been a staple with our consumers for more than 70 years. We figured we'd take the best of both flavors and fuse them into Sour Cream and Dill, allowing for a brand-new taste sensation with the assurance of flavor familiarity for a new product. It has quickly proven to be one of our best-selling kettle chips."

Bringing together two favorites is indeed another popular choice for many snack makers. Consumers are embracing mashups, Ms. Vesper said.

"Over the last year especially, we've seen that consumers love crossover flavors from different

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brands or categories to bring something unexpected to a snack they already love. Our Smartfood Krispy Kreme mashup is a great example of this — the mashup was flying off shelves,” she said.

Others that have shown up recently are the limited-edition Frank's RedHot Goldfish crackers, combining two well-known brands, and Calbee America Inc.'s Popper Duos, which come in BBQ & Ranch and Salsa & Cheddar combinations, among others.

“Mashups are fantastic. Even if they don't have permanent legs, they provide excitement in the categories that they connect,” said Rob Sarlls, chief executive officer at Wyandot Snacks, Marion, Ohio. “We're going to see a lot of that going forward. We're not doing that today, but I'm wide open to doing that in the future..”

SNAC members cited a variety of other flavors, like buttery, plant-based, onion and more.

“Fast food-inspired flavors seem to be a ‘thing’ now with companies borrowing flavors like specific sandwich flavors from fast-food restaurants for new potato chip offerings,” Mr. Vierhile said. “This type of co-branding activities borrows some of the equity from these enterprises as the fast-food industry spends a lot of money on advertising each year, money that can help drive trial for new snacks featuring flavors popularized by fast-food offerings.”

The demand for seasonal and holiday snacks is another favorite.

“Seasonal flavors have been and will likely continue to be a big hit with consumers,” Ms. Vesper said. “Whether it's pumpkin spice in the fall or cookie-flavored innovations around the holidays, consumers respond quite positively to a seasonal twist on their favorite snacks — this trend is here to stay.”

WHERE TO GO NEXT

Figuring out what new innovations to pursue is never easy, but companies study trends using data to inform their decisions.

“Everything at Frito-Lay starts with data,” Ms. Vesper said. “For example, we use consumer preference data to develop regional and limited-edition flavor offerings tapping into our database of 1,000-plus flavor variations. It's these insights and extended research that help inform when to innovate new snacks and what fan favorites might be ready for a comeback.”

Wyandot examines the marketplace to see the new flavors that consumers are pursuing.

“We do a lot of field research,” Mr. Sarlls said. “We're always reading the trades to see what other companies are doing. We look at other categories, too. Our people walk the store, and they're always looking at the data online to see what is popping above the fray.”

Mio Sakata, president of Calbee America Inc., Fairfield, Calif., said he's not as interested in flavor extension as he is in finding new ways to flavor snacks.

“I like to look for different technology to enhance flavors,” he said. “There's a lot of different ways to season the snack. We have a different type of technology to do it. So we may try double or triple layers of flavors or infusing flavors, or combining two flavors in one.”

Whether companies are considering enhancing customer favorites or looking around the globe for their next flavor innovation, it's clear there's an appetite for all of it. It's just a matter of tapping into the wants and needs of their consumers. ♦



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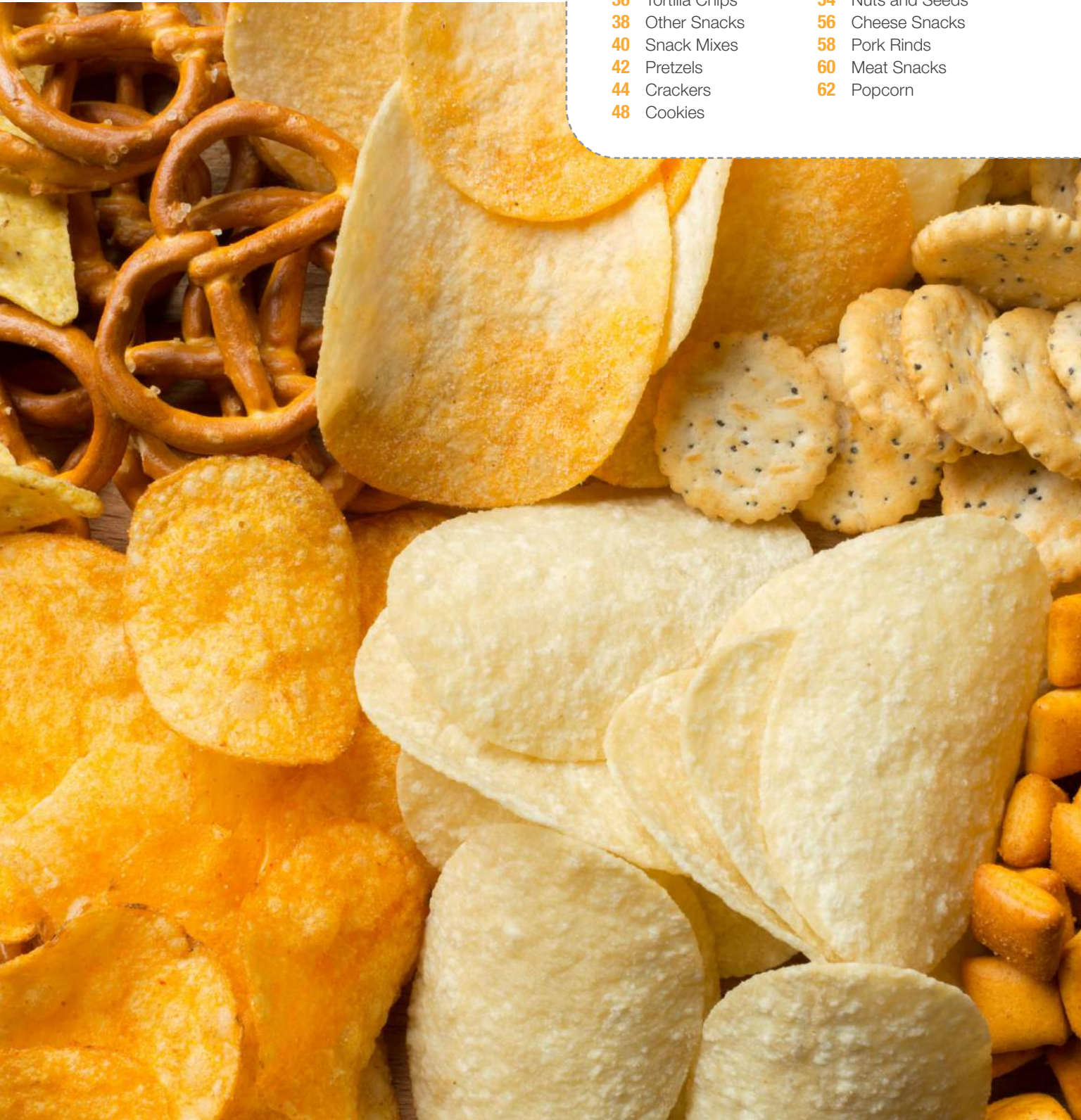
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state of the industry CATEGORY REPORTS

All data is from IRI and commissioned by SNAC International. Expanded snack IRI category charts are available through SNAC World magazine's digital edition. For more information on SNAC World magazine, please contact the association at www.snacintl.org.

- | | | | |
|----|---------------------|----|----------------|
| 32 | Other Salted Snacks | 50 | Bars |
| 34 | Potato Chips | 52 | Corn Snacks |
| 36 | Tortilla Chips | 54 | Nuts and Seeds |
| 38 | Other Snacks | 56 | Cheese Snacks |
| 40 | Snack Mixes | 58 | Pork Rinds |
| 42 | Pretzels | 60 | Meat Snacks |
| 44 | Crackers | 62 | Popcorn |
| 48 | Cookies | | |



JUST LIKE NO OTHER

Rampant innovation propels sales of Other Salted Snacks.

When it comes to Other Salted Snacks, this category just wants to have more fun. Certainly, the segment defies stereotypes. If it isn't a potato chip, popcorn, pretzel or other conventional salted snack, the product will certainly find a home along with a hodgepodge of popped, puffed, crisps, veggie, protein-infused mishmash of better-for-you and more decadent munchies that are tossed into this catch-all category.

Without a doubt, this collection of Other Salted Snacks has a lineup of all-star performers ranging from the biggest players in the industry to incubators and startups — many of which are supported by co-manufacturers across the nation — that are fueling the category's double-digit growth.

Powering growth over the past year are brands such as SunChips, Funyons, Sensible Portions and Off the Eaten Path, to name a few.

Many of the category's snacks rely on patented technology, while others use a combination of co-extrusion, air popping or taking a brand like Ritz from the cracker aisle and producing it in a chip-like or baked snack format. Often products contain fruits and vegetables and offer organic or GMO-free eating alternatives. Other products like Doritos & Cheetos pair powerhouse brands into the same package to create another snacking sensation.

"We've also seen that consumers are seeking better-for-you snacking options post-pandemic, like those found in our Bare, Popcorners and Baked brands," said Leslie Vesper, vice president of marketing, innovation, Frito-Lay. "But we also know they are looking for bold, indulgent snacking options. So we continue to focus on variety in our innovation, so there is something for everyone within Frito-Lay's portfolio."

Look for innovation to ramp up even further in the second half of this year as companies both big and small redefine the snacking occasion with even more creative varieties of Other Salted Snacks.

— Dan Malovany



CATEGORY INNOVATIONS

◆ Better-for-you snacks just became hotter than ever when **Hain Celestial** turned up the heat with its Terra, Sensible Portions and Garden of Eatin' snacks.

◆ During the past year, Pirate's Booty rolled out Fruit Sticks and Veggie Sticks to broaden its portfolio into sweet and savory, healthier snacking alternatives. **Amplify Snack Brands**, a subsidiary of **The Hershey Co.**, also extended its line with a Pirate's Booty Cheddar Blast variety. Meanwhile, **General Mills** rolled out the big cheese in a big way with White Cheddar Chex Mix.

◆ In a co-branding initiative, **Snak King** expanded its El Sabroso portfolio with Mexi-Crisps wheat snacks flavored with Tapatio Hot Sauce flavored seasoning.

◆ **Calbee America** extended its popular Harvest Snaps line with Crunchions that are ring-shaped, plant-based snacks that come in Kick'n BBQ, Sour Cream & Onion and Tangy Sweet Chili options.

TOP OTHER SALTED SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Other Salted Snacks	\$4,847.0	14.8%	1,163.0	7.3%	777.2	10.3%
◆ All Frito-Lay Products	\$2,061.0	21.0%	242.0	14.0%	349.1	15.3%
◆ SunChips	\$321.2	21.0%	106.4	19.8%	49.0	20.2%
◆ Funyuns	\$280.8	18.5%	105.8	5.5%	27.2	12.4%
◆ Chester's	\$179.6	2.6%	95.5	-2.2%	26.0	-5.0%
◆ General Mills Chex Mix	\$168.1	-6.1%	67.0	-4.4%	50.3	-6.8%
◆ Doritos & Cheetos	\$163.5	3.3%	21.3	-2.8%	27.4	1.2%
◆ Sensible Portions Garden Veggie Straws	\$143.4	17.1%	35.1	15.8%	22.7	11.8%
◆ Private Label	\$104.8	3.1%	46.9	1.9%	18.8	5.2%
◆ Pirate's Booty	\$102.9	3.6%	22.1	2.8%	9.0	3.9%
◆ Lay's Poppables	\$99.7	1.3%	36.3	-4.7%	11.7	-2.0%
◆ Frito-Lay	\$75.1	21.8%	10.5	16.8%	17.7	18.8%
◆ Utz	\$70.3	8.1%	14.7	2.4%	17.0	5.5%
◆ Munchies	\$65.3	-2.1%	20.3	-4.9%	11.3	-8.6%
◆ Nabisco Ritz Crisp & Thins	\$63.0	-16.2%	20.8	-15.9%	9.8	-15.1%
◆ Cheez-It	\$54.4	-1.4%	18.3	-4.2%	10.9	-4.3%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



“For our brands, we saw trends like Cheetos recipe searches skyrocketing 190%. So now we're thinking with that lens through everything we introduce to the world. Hopefully, Cheetos Crunch Pop Mix can provide a small moment of joy and bring a few smiles this year.”

Rachel Ferdinando, senior vice president and chief marketing officer, Frito-Lay North America



TOP

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◆ Utz	\$70.3	8.1%	14.7	2.4%	17.0	5.5%
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◆ Cheez-It	\$54.4	-1.4%	18.3	-4.2%	10.9	-4.3%
◆ Quest	\$51.3	273.1%	12.0	144.3%	1.8	326.1%
◆ Harvest Snaps	\$48.1	-1.8%	25.5	-2.9%	5.4	-0.5%
◆ Gardetto's	\$46.4	5.0%	16.1	9.1%	13.4	5.0%
◆ Terra	\$41.9	-11.4%	10.8	-7.4%	4.5	-12.3%
◆ Popchips	\$33.3	-6.8%	9.6	-8.0%	3.2	-9.3%
◆ Off The Eaten Path	\$33.2	26.1%	7.6	4.0%	4.8	43.7%
◆ Nabisco Ritz Cheese Crispers	\$32.6	-	11.2	-	4.9	-
◆ All Kellogg Products	\$25.2	33.0%	2.4	29.4%	5.1	26.9%
◆ Hippeas	\$25.2	8.8%	7.5	6.3%	2.1	9.0%
◆ Sensible Portions Garden Veggie Chips	\$22.5	13.0%	7.2	10.5%	2.7	10.9%
◆ All Wise Products	\$21.6	-11.1%	2.8	-13.2%	4.3	-12.8%
◆ Quaker	\$20.8	78.5%	3.2	121.7%	2.2	79.9%
◆ Andy Capp's	\$20.5	0.4%	14.0	-1.8%	4.3	0.1%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

MIX AND MASHUPS

Potato chip makers rely on FOMO to fire up sales.

In the potato chip aisle, those who hesitate may miss out on something new as snack manufacturers rolled out flavors and line extensions for a limited-time only (LTO). It doesn't matter if they're Lay's summertime flavors or a Herr's mystery flavors contest — and the chance to win \$10,000 — that were only available for a couple months. Fear of missing out (FOMO) has proven to be an effective marketing and merchandising tool for driving impulse potato chip purchases.

Overall, the Potato Chips category experienced a 5.3% growth, according to IRI data for 52 weeks ending May 16, 2021. That bodes good news not only for the category, but also for the snack industry as a whole. The segment saw double-digit growth by many brands, including Lay's, Pringles, Kettle, Miss Vickie's and Zapps, as competition in the snack aisle remained strong.

However, overall unit sales and volume for the Potato Chips category declined ever so slightly. Those numbers could indicate that retailers are

allowing potato chip producers to raise overall pricing. At the same time, the data could also reflect challenged year-over-year comparisons to the previous year when American households stocked up during the first few months of the pandemic.

During a recent webinar on "The Snacking Frenzy in 2021 and Beyond," Sally Lyons Wyatt, executive vice president and practice leader, IRI, urged the industry to develop innovative products to fuel the snacking craze.

"Ensure each brand in your portfolio provides incrementality for consumer targets and/or occasions and/or nutritional needs," she said. "You do not need multiple products in your portfolio that are going to the same person for the same need. It doesn't mean you can't. But what would be even better is if you had products not only going after maybe the same person but maybe for a different occasion or different target to find incremental buyers [and] to find incremental loyalists."

LTOs do just that. Feed the FOMO.

— Dan Malovany



CATEGORY INNOVATIONS

- ◆ **Herr's** launched the Flavor Mix Mystery Chip where consumers with the sharpest taste buds are asked to guess the three flavors in the snack for a chance to win \$10,000 and a year supply of Herr's. Others like **Frito-Lay** rolled out limited-time Lay's snacks that come in Chile Mango, Wavy Jerk Chicken and Summer BLT flavors.
- ◆ Potato chip makers introduced different textures and flavors. **Tim's Cascade Snacks**, a part of **Utz Brands**, rolled out Cajun-flavored variety of extra thick and crunchy chips, while **Boulder Canyon**, another Utz-owned brand, came out with thin and crispy ones.
- ◆ Large family-sized bags surged in popularity as households remained homebound, but sales of smaller packs are expected to increase as mobility returns this year.
- ◆ Hot and spicy potato chips come in all flavors, including **Wise** Southern Peach Habanero, Pringles Pineapple Habanero, **Ballreich's** Sriracha and **Snak King's** El Sabroso/Tapatío hot sauce varieties.
- ◆ Some producers found inspiration from the foodservice channel with the **Kellogg Company** rolling out Pringles Wavy Moa Burger with a ginger, garlic and burger flavor blend.

TOP POTATO CHIP BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Potato Chips	\$6,658.4	5.3%	2,715.3	-0.6%	1,318.3	-0.7%
◆ Lay's	\$2,083.8	12.5%	738.5	4.6%	389.3	4.8%
◆ Ruffles	\$869.0	8.3%	285.4	1.7%	152.9	3.8%
◆ Pringles	\$729.9	10.2%	428.5	4.3%	150.2	6.3%
◆ Private Label	\$518.7	-8.0%	312.7	-11.5%	180.2	-11.1%
◆ Cape Cod	\$284.4	6.7%	86.0	0.3%	49.0	4.2%
◆ Lay's Kettle Cooked	\$262.8	6.6%	94.5	5.7%	47.0	5.7%
◆ Wavy Lay's	\$259.8	-38.1%	97.3	-34.5%	47.8	-45.0%
◆ Kettle	\$231.3	12.0%	80.0	5.3%	43.6	9.5%
◆ Utz	\$222.1	6.6%	90.1	0.4%	46.1	4.9%
◆ Lay's Stax	\$78.7	-4.4%	65.6	-4.8%	22.8	-5.1%
◆ Lay's Oven Baked	\$72.9	-10.8%	23.9	-14.9%	9.3	-10.1%
◆ Pringles Snack Stacks	\$66.2	32.5%	13.1	31.5%	7.2	28.2%
◆ Ruffles Oven Baked	\$62.1	6.1%	20.3	4.6%	7.9	4.6%
◆ Herr's	\$57.1	-1.6%	23.4	-5.1%	12.7	-1.8%
◆ Wise	\$56.6	-6.3%	31.1	-9.8%	12.3	-8.4%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.





“We have taken three classic flavors and mixed them into one tasty chip to make one never-tasted-before flavor. One chip and 15 Herr’s flavors to choose from. With more than 2,500 possible flavor combinations, we are putting your taste buds to the ultimate taste test.”

Bob Clark, vice president of marketing, Herr’s



TOP

POTATO CHIP SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Potato Chips	\$6,658.4	5.3%	2,715.3	-0.6%	1,318.3	-0.7%
◆ Lay's	\$2,083.8	12.5%	738.5	4.6%	389.3	4.8%
◆ Ruffles	\$869.0	8.3%	285.4	1.7%	152.9	3.8%
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◆ Ruffles Oven Baked	\$62.1	6.1%	20.3	4.6%	7.9	4.6%
◆ Herr's	\$57.1	-1.6%	23.4	-5.1%	12.7	-1.8%
◆ Wise	\$56.6	-6.3%	31.1	-9.8%	12.3	-8.4%
◆ Ruffles Sabritas	\$56.5	94.8%	23.7	63.5%	8.7	97.2%
◆ Baked Lay's	\$43.1	116.0%	15.4	119.9%	5.4	107.4%
◆ Munchos	\$35.2	2.5%	16.8	-6.0%	4.2	-28.3%
◆ Miss Vickie's	\$34.1	41.2%	7.3	48.9%	5.9	40.6%
◆ Zapp's	\$33.9	25.7%	16.5	14.6%	5.8	28.2%
◆ Pringles Grab & Go Stack	\$32.0	1.6%	14.1	-13.5%	4.6	-2.9%
◆ Utz Kettle Classics	\$29.0	15.0%	11.0	13.4%	5.3	15.6%
◆ Golden Flake	\$28.3	2.7%	18.1	-0.2%	5.1	-1.7%
◆ Old Dutch	\$26.5	6.8%	8.2	2.5%	5.6	3.4%
◆ Wise Ridgies	\$26.3	-14.4%	16.2	-19.3%	5.9	-16.3%
◆ Ruffles Double Crunch	\$25.8	-19.2%	8.7	-26.3%	3.7	-22.3%
◆ Hawaiian	\$23.9	19.1%	7.5	17.2%	4.3	20.0%
◆ Better Made Special	\$23.0	-5.6%	9.0	-11.5%	5.3	-10.4%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

CHIPS OFF THE OLD BLOCK

Let the chips fall where they may in this market.

Anything goes when it comes to the Tortilla Chips category these days. While the mainstay triangular-shaped snack remains most popular, today's varieties come in all shapes and sizes: square, round, curled, extra thick, cantina-style, popped, 3D and a whole lot more.

And go ahead, pick a flavor. Tortilla chips are infused with everything from fruit and vegetables to soy sauce and lime that provide a crunchy complement to whatever the family plans to cook or order from DoorDash for lunch or dinner.

This year, Frito-Lay's stalwart brands like Doritos and Tostitos fueled the category sales growth, supported by some rising stars. Don't underestimate Barcel USA, a division of Grupo Bimbo, which surged into the limelight with its sassy Takis rolled tortilla chips brand, which ventured into the nuts, corn and cheese snack categories with new products. Late July, a Campbell Snacks brand, performed well as did Siete Family Foods and On the Border, which along with its primary supplier, Festida Foods, was acquired by Utz Brands.

PepsiCo Inc. also ventured into the better-for-you snacking arena with its Hilo Life, a keto-friendly snack brand with tortilla-style chips formulated with defatted almond flour. The products were developed to tap into "nostalgia," said Amanda Cheung, brand director for Hilo Life, which is part of PepsiCo's HIVE portfolio, an internal brand incubator focused on developing and nurturing new, differentiated, innovative brands that meet consumer needs.

— Dan Malovany



CATEGORY INNOVATIONS

- ◆ No grains, no problem. Better-for-you tortilla chips now include grain-free options made with cassava flour from **Siete Family Foods** or almond flour from **Hilo Life** and even produce-inspired products like **Late July** Dangle the Carrot Organic Multigrain Vegetable Tortilla Chips.
- ◆ Organic sales remain strong as companies roll out new varieties that proliferate the market, driven by both small and large snack manufacturers.
- ◆ Despite sagging sales of some BFY products, organic tortilla chip sales remain strong as companies come out with new varieties to invigorate this segment of the category.
- ◆ Although they may be considered "other" snacks by purists, bananas, beet, jerky and even baked beans — make that **Bush's Best Bean Chips** — now compete with more conventional corn- and wheat-based floured tortilla chips.

TOP

TORTILLA CHIP BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Tortilla/Tostada Chips	\$5,137.8	6.3%	1,817.6	2.4%	1,270.8	2.0%
◆ Doritos	\$1,946.2	5.6%	688.8	1.7%	414.5	0.5%
◆ Tostitos	\$755.8	6.1%	226.0	2.6%	188.0	3.1%
◆ Tostitos Scoops	\$508.0	1.1%	143.5	-2.7%	102.8	-2.0%
◆ Barcel Takis Fuego	\$356.1	21.8%	132.0	15.1%	76.4	20.3%
◆ Private Label	\$301.8	-4.6%	169.5	-5.4%	134.0	-7.9%
◆ On the Border	\$215.1	12.1%	70.6	7.9%	74.0	9.1%
◆ Santitas	\$168.8	-9.0%	76.6	-11.9%	53.0	-11.8%
◆ Mission	\$95.4	7.5%	37.0	10.8%	32.6	9.5%
◆ Calidad	\$74.0	-1.2%	40.5	-2.2%	31.9	-2.1%
◆ Late July Organic	\$63.3	1.7%	19.8	-0.9%	11.1	4.7%
◆ Barcel Takis	\$51.3	306.5%	17.3	454.4%	10.6	258.5%
◆ Late July	\$44.4	45.6%	13.8	39.0%	7.7	36.9%
◆ Juanitas	\$44.0	7.4%	15.8	7.0%	16.9	7.8%
◆ Siete	\$39.0	69.9%	8.5	65.7%	2.8	71.1%
◆ Simply Organic Tostitos	\$31.2	-1.3%	9.5	-2.0%	4.9	-2.0%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



“In combination with our small but growing premium Tortiyahs! brand, the integration of the On The Border brand will continue to improve Utz’s scale and product diversification, which are important success factors in salty snacks.”

Dylan Lisette, chief executive officer,
Utz Brands

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Dylan Lissette, chief executive officer, Utz Brands



TOP

TORTILLA CHIP SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Tortilla/Tostada Chips	\$5,137.8	6.3%	1,817.6	2.4%	1,270.8	2.0%
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◆ On The Border	\$215.1	12.1%	70.6	7.9%	74.0	9.1%
◆ Santitas	\$168.8	-9.0%	76.6	-11.9%	53.0	-11.8%
◆ Mission	\$95.4	7.5%	37.0	10.8%	32.6	9.5%
◆ Calidad	\$74.0	-1.2%	40.5	-2.2%	31.9	-2.1%
◆ Late July Organic	\$63.3	1.7%	19.8	-0.9%	11.1	4.7%
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◆ Late July	\$44.4	45.6%	13.8	39.0%	7.7	36.9%
◆ Juanita's	\$44.0	7.4%	15.8	7.0%	16.9	7.8%
◆ Siete	\$39.0	69.9%	8.5	65.7%	2.8	71.1%
◆ Simply Organic Tostitos	\$31.2	-1.3%	9.5	-2.0%	4.9	-2.0%
◆ Garden of Eatin' Blue Chips	\$20.8	-0.4%	5.0	-2.7%	4.0	-8.3%
◆ Sabritas Tostitos	\$18.8	11.6%	6.2	9.0%	4.4	5.7%
◆ Tortiyahs	\$18.4	91.3%	6.5	93.5%	4.9	90.2%
◆ Old Dutch	\$17.9	-0.9%	6.2	-3.2%	5.1	-3.6%
◆ Simply Organic Doritos	\$17.5	-2.8%	5.4	-11.8%	2.5	-1.3%
◆ Julio's	\$16.8	18.5%	4.6	12.9%	3.5	15.2%
◆ Food Should Taste Good	\$16.7	-2.5%	4.5	-5.4%	2.3	-2.1%
◆ Doritos Sabritas Dinamita	\$15.7	-11.5%	7.7	-13.5%	2.7	-14.3%
◆ Tostitos Cantina	\$12.0		3.7		2.5	
◆ Garden of Eatin'	\$11.5	-24.6%	2.5	-25.6%	2.2	-23.5%
◆ Donkey Chips	\$11.4	15.9%	3.6	12.4%	3.1	12.8%
◆ Casa Sanchez	\$11.2	5.9%	3.2	5.6%	2.8	5.6%
◆ WildRoots	\$10.6	8.6%	2.4	0.6%	2.4	0.6%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

BROADENING THE DEFINITION OF SNACK

Consumers look outside conventional categories to find BFY snack options.

As the stress of the pandemic became the new normal, consumers started to clean up their snacking or turn to other categories to satiate cravings.

The twin trends of a need for variety and healthy snack alternatives explain why the apple chip category saw 18.2% growth in dollar sales, according to IRI data for the 52 weeks ending May 16, 2021. The major winners in this category were Bare, Seneca and Greentown Foods, which all experienced double-digit dollar sales growth as well.

While apple chips saw double-digit growth, the entire category of Other Snacks remained fairly flat, with chocolate-covered salted snacks experiencing a modest 2.9% increase in dollar sales and carob- and yogurt-coated snacks seeing 6.5% dollar growth. Unit sales across the entire category, however, were down 4.1%, despite apple chips gaining 13.6% growth in unit sales. Much of the losses or flatness in this category can be attributed to double-digit losses felt by smaller companies.

With apple chips and carob- and yogurt-coated snacks carrying the Other Snacks category, it's clear that consumers were driven by their need for snacks they considered healthier than traditional.

— Charlotte Atchley



CATEGORY INNOVATIONS

- ◆ Chips made from fruits did well during the pandemic, a sign of consumers' move back toward healthy snacking once it was clear that stay-at-home orders would endure.
- ◆ Yogurt-coated snacks and other treats made with yogurt experienced strong growth. These products often contain healthy whole food ingredients like fruit, complementing the better-for-you coating of yogurt.

TOP OTHER SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Chocolate Covered Salted Snacks	\$192.8	2.9%	60.0	-1.7%	27.7	0.7%
◆ Flipz	\$47.2	13.1%	17.3	4.1%	7.3	13.4%
◆ Private Label	\$30.2	0.3%	9.1	-7.9%	4.4	2.2%
◆ Total Carob/Yogurt Coated Snacks	\$106.9	6.5%	36.2	1.8%	15.9	2.4%
◆ Sun-Maid	\$38.4	8.2%	12.8	9.6%	4.9	8.8%
◆ Private Label	\$25.6	3.8%	9.2	-3.4%	4.3	1.7%
◆ Total Apple Chips	\$30.2	18.2%	10.1	13.6%	1.9	22.6%
◆ Bare	\$19.1	20.6%	4.4	15.7%	1.1	27.0%
◆ Seneca	\$9.9	20.7%	5.1	20.7%	0.8	20.7%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



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HITTING THE BULL'S-EYE

Snack and trail mixes find potential for growth in claims.

The Snack and Trail Mix category struggled during the coronavirus (COVID-19) pandemic. While most other categories were posting big growth numbers, Snack Mixes saw dollar sales decline 1%, unit sales drop 6.4% and volume sales slip 1.4%. Private label still makes up the bulk of the category with \$576.4 million with little movement. While many of the top-selling brands were down in the 52 weeks ending May 16, 2021, Orchard Valley Harvest and Planters Nutrition both saw double-digit declines in dollar sales.

The category was carried by double-digit growth from brands like Nature's Garden and Gourmet Nut Power Up. While many Snack and Trail Mix brands position themselves as healthy snacks for active consumers, the ones that saw success were those that marketed themselves as keto-friendly, as is the case for Nature's Garden and Gourmet Nut Power Up. Both brands not only lead with a keto-friendly claim, they also provide products that are targeted to other nutritional needs such as antioxidants, omegas and protein.

New product innovation, however, was driven by fun and creative products that would provide the comfort of indulgence and familiarity.

— Charlotte Atchley



CATEGORY INNOVATIONS

- ◆ Snack and trail mixes that experienced the most growth tackled consumers' specific diet needs, such as keto.
- ◆ Crossovers between food categories and brands provide a way to innovate with built-in consumer buy-in.
- ◆ While consumers were looking for nutritious snacks in the Snack and Trail Mix category, they also wanted to indulge, so products that offered a path to both goals got attention.

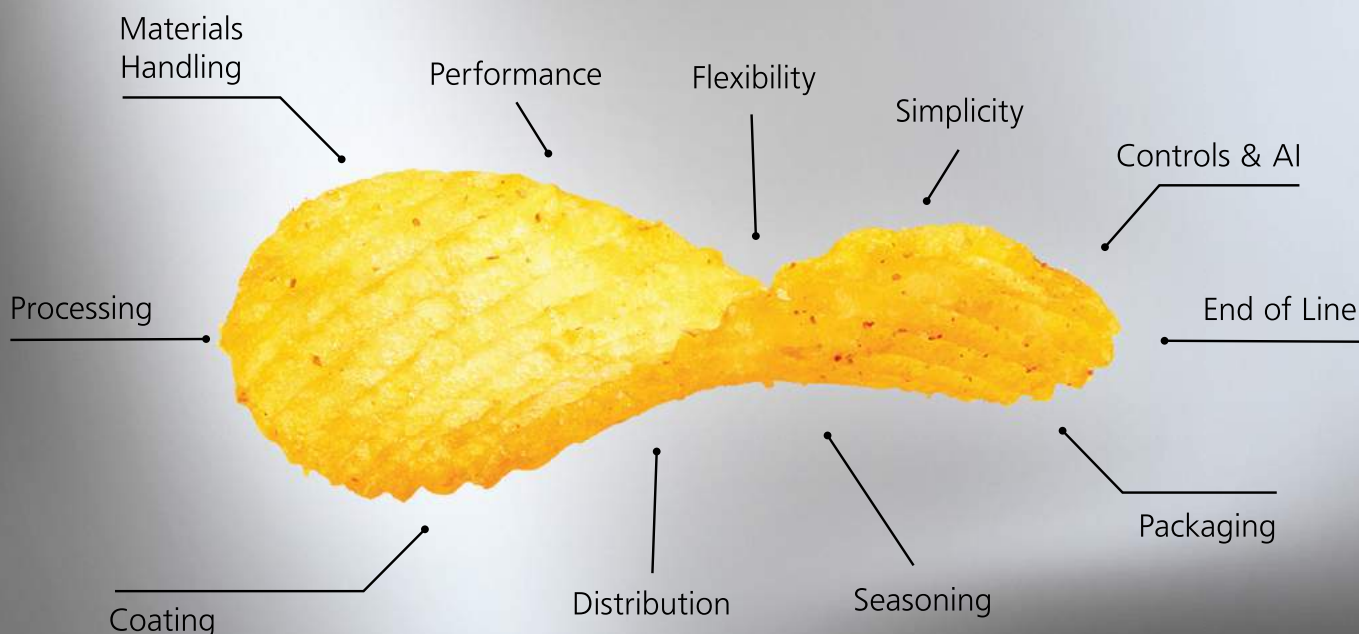
TOP SNACK MIX BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Nutritional Snacks/Trail Mixes	\$969.4	-1.0%	206.8	-6.4%	191.3	-1.4%
◆ Private Label	\$576.7	0.3%	115.6	-1.3%	123.7	-1.5%
◆ Kar's Sweet 'N Salty Mix	\$40.3	2.0%	5.6	-12.0%	14.5	3.2%
◆ Second Nature	\$27.0	9.1%	4.7	8.2%	4.0	13.9%
◆ Nature's Garden	\$26.6	97.2%	3.0	103.2%	3.6	68.2%
◆ Sahale Snacks	\$23.0	9.7%	8.4	3.8%	1.4	12.9%
◆ Gourmet Nut Power Up	\$19.5	24.4%	4.0	25.6%	3.2	23.1%
◆ Southern Style Nuts	\$19.5	-6.6%	2.3	-11.9%	4.7	-7.6%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

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SEASONED

WITH A HALO OF HEALTH

Pretzels benefit from a better-for-you perception.

While most snack categories thrived from a shift to retail during the coronavirus (COVID-19) pandemic, Snack Pretzels enjoyed a bump in sales largely due to their healthy halo and versatility. Better-for-you (BFY) and better-for-planet brand Quinn Snacks saw triple-digit growth when it came to dollar sales compared to a year ago as did seasoned pretzel producer Dot's Homestyle Pretzels and artisan Bavarian pretzel-maker Pretzel Baron. The category as a whole saw 7.3% dollar growth from 2020, 1.3% unit sales growth and 2.9% growth in volume sales.

Much of this was driven by consumers looking for a crunchy, salty snack that offered a variety of flavors and formats that consumers could feel good about eating. In fact, Dot's Homestyle Pretzels, which offer a wide variety of flavors such as Original Seasoned, Southwest and Honey Mustard, ranked No. 3 in IRI's data, only behind Snyder's of Hanover and private label pretzels.

Pretzels' healthy perception also lends these snacks to innovation around health trends like nut butters and grain-free. Filled pretzel products are not only a format outside of conventional twists, but these products also provide snack producers a way to incorporate a punch of protein as well as pretzels' own take on the sweet and salty trend beyond chocolate-covered. And new ingredients like cassava, sorghum and even vegetables are finding their way into this stand-by snack to appeal to consumers looking for munchies that meet their dietary needs or aspirations.

— Charlotte Atchley



CATEGORY INNOVATIONS

- ◆ Filled pretzels aren't new, but the filling options provide a lot of room for innovative new products, whether they are indulgent like chocolate and cheese in a soft pretzel bite or provide the healthy halo of almond butter inside a crunchy pretzel pillow.
- ◆ Seasoned pretzels satisfy consumers' desire for heat and something new on a product many consider a healthier alternative to other salty, crunchy snacks. Pretzel producers have found inspiration in other food categories as well as other classic snack flavors.
- ◆ Grain-free is gaining traction against gluten-free and hits many dietary needs and trends such as clean label and sustainability. Popular alternative ingredients include cassava, sorghum and root vegetables.
- ◆ Crossovers between snacks and other categories and popular foods can create opportunities for new products such as adding a favorite local beer to pretzels or malted milk balls into pretzel bites.

TOP

PRETZEL BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Pretzels	\$1,180.7	7.3%	368.9	1.3%	336.7	2.9%
◆ Snyder's of Hanover	\$449.7	6.7%	145.0	5.5%	125.5	4.6%
◆ Private Label	\$185.8	0.8%	70.9	-6.5%	75.4	-0.6%
◆ Dot's Homestyle Pretzels	\$126.3	101.9%	22.6	99.6%	21.7	104.6%
◆ Rold Gold	\$113.9	-9.5%	37.8	-12.2%	34.5	-10.0%
◆ Utz	\$98.7	6.5%	25.3	3.4%	32.9	3.3%
◆ Combos	\$36.7	-14.1%	16.3	-18.3%	7.2	-24.2%
◆ Snyder's of Hanover 100 Cal Pack	\$22.8	-6.8%	5.0	-9.2%	3.6	-7.4%
◆ Utz Specials	\$19.4	7.8%	5.4	4.4%	6.1	5.5%
◆ Herr's	\$15.0	1.8%	4.2	-3.9%	4.4	-0.3%
◆ Unique Splits	\$13.1	9.7%	4.3	11.0%	3.0	10.8%
◆ Bachman	\$11.4	-5.2%	3.8	-6.3%	2.3	-6.8%
◆ Old Dutch	\$11.1	2.3%	3.8	-1.4%	3.6	-1.5%
◆ Glutino	\$8.2	-2.2%	1.7	-2.4%	1.3	1.2%
◆ Pretzel Baron	\$6.1	172.8%	3.2	414.4%	2.1	219.6%
◆ Unique	\$5.3	-0.4%	1.7	0.8%	1.1	-0.1%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



“Snacking is multi-sensorial – texture and flavor have to work together, and it has to be visually appealing. The design of our Snyder’s of Hanover Twisted is a great example of this.”

Valerie Oswalt, president,
Campbell Snacks



“Pretzels have grown significantly, mainly driven by innovation and brands making things that taste great and people want more of, whether it’s a Dot’s seasoned pretzel or a filled pretzel. They really have been seeing significant growth as the brands continue to innovate.”

Greg Pearson, Pretzels Inc.



TOP

PRETZEL SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Pretzels	\$1,180.7	7.3%	368.9	1.3%	336.7	2.9%
◆ Snyder's of Hanover	\$449.7	6.7%	145.0	5.5%	125.5	4.6%
◆ Private Label	\$185.8	0.8%	70.9	-6.5%	75.4	-0.6%
◆ Dot's Homestyle Pretzels	\$126.3	101.9%	22.6	99.6%	21.7	104.6%
◆ Rold Gold	\$113.9	-9.5%	37.8	-12.2%	34.5	-10.0%
◆ Utz	\$98.7	6.5%	25.3	3.4%	32.9	3.3%
◆ Combos	\$36.7	-14.1%	16.3	-18.3%	7.2	-24.2%
◆ Snyder's of Hanover 100 Calorie Pack	\$22.8	-6.8%	5.0	-9.2%	3.6	-7.4%
◆ Utz Specials	\$19.4	7.8%	5.4	4.4%	6.1	5.5%
◆ Herr's	\$15.0	1.8%	4.2	-3.9%	4.4	-0.3%
◆ Unique Splits	\$13.1	9.7%	4.3	11.0%	3.0	10.8%
◆ Bachman	\$11.4	-5.2%	3.8	-6.3%	2.3	-6.8%
◆ Old Dutch	\$11.1	2.3%	3.8	-1.4%	3.6	-1.5%
◆ Glutino	\$8.2	-2.2%	1.7	-2.4%	1.3	1.2%
◆ Pretzel Baron	\$6.1	172.8%	3.2	414.4%	2.1	219.6%
◆ Unique	\$5.3	-0.4%	1.7	0.8%	1.1	-0.1%
◆ H.K. Anderson	\$3.7	-13.1%	0.7	-14.8%	0.9	-14.3%
◆ Quinn	\$3.7	122.3%	0.8	121.7%	0.3	120.0%
◆ Utz Select	\$3.4	-18.6%	0.5	-33.8%	0.8	-20.5%
◆ Better Made Special	\$3.3	19.1%	1.2	2.6%	0.9	4.4%
◆ Snyder's of Hanover Sweet & Salty	\$2.8	-36.7%	0.9	-38.2%	0.6	-38.0%
◆ Wege of Hanover	\$2.7	-5.7%	0.9	-23.4%	0.9	-19.7%
◆ From The Ground Up	\$2.7	-1.3%	0.8	-0.5%	0.2	-2.1%
◆ Bachman Thin'n Right	\$2.3	6.4%	0.7	5.6%	0.4	5.6%
◆ Herr's Specials	\$2.1	-16.4%	0.7	-14.6%	0.7	-14.3%
◆ Penny Sticks	\$1.8	-29.4%	1.7	-30.1%	1.3	-30.2%
◆ Dakota Style Pretzel Kravings	\$1.4	16.6%	0.3	18.4%	0.1	18.3%
◆ Tom Sturgis	\$1.3	-10.5%	0.5	-12.8%	0.3	-13.9%
◆ Utz Daisies	\$1.3	150.9%	0.4	148.0%	0.3	148.0%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

THAT SALTY SNAP

Both established and new brands are producing a variety of BFY crackers.

Whether eaten alongside your lunchtime soup, slathered with your favorite cheese or dipped in hummus, Americans love crunchy, salty crackers.

They come in a wide variety of formats, and many consumers keep several types of crackers in their pantries. Dollar sales for all Crackers were up slightly — 0.6% — for the 52 weeks ending May 16, 2021, and sitting atop the list of best sellers are the small cheesy varieties. Cheez It crackers' dollar sales were up 4.5% while Pepperidge Farm's Goldfish sales dropped 2.2%. And crackers with fillings fell a bit, too, during the period, with dollar sales down 4%.

As with many other snacks, the innovation in the category leans toward the better-for-you products, with several new entries offering lower calorie, gluten-free, plant-based, non-GMO, low-carb and vegan claims. Both established brands and newcomers are entering the fray.

Earlier this year, Kellogg Company launched lighter versions of two longtime favorites, Club Crisps and Town House Dipping Thins.

"Our innovation and research and development teams are continuously re-imagining our iconic crackers, looking for ways to give snack lovers even more ways to enjoy our brands," said Zach Wyer, director of brand marketing for Kellogg's cracker products.

— Michelle Smith



CATEGORY INNOVATIONS

- ◆ Consumers are seeking out gluten-free and grain-free products in higher numbers, and companies are responding. Many are turning to alternate ingredients like almond flour.
- ◆ Other ingredients found in BFY crackers include oats, flaxseeds, brown rice and quinoa. **Bob's Red Mill Oat Crackers** has all of these and are Non-GMO Project verified.
- ◆ One newcomer to the market boasts that it is climate friendly and a 7.5-oz box removes 18 to 21 grams of carbon dioxide from the air. **Airly Oat Clouds** are the first product from **Airly Foods**.
- ◆ Consumers are snapping up spicy foods and mashups that offer variety and novelty. **Campbell Snack's Goldfish** brand teamed up with **Frank's RedHot** to create a spicy cracker that appeals to adults.
- ◆ Thinner varieties of popular snacks intrigue consumers who want the great taste of their favorite snacks but don't want to overindulge. **The Kellogg Company** slimmed down two popular cracker brands into **Club Crisps** and **Town House Dipping Thins**.

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TOP CRACKERS BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Crackers	\$7,599.0	0.6%	2,606.2	-2.5%	1,882.0	-1.1%
◆ Cheez It	\$876.7	4.5%	268.0	-0.8%	224.4	2.7%
◆ Pepperidge Farm Goldfish	\$588.1	-2.2%	187.7	-1.2%	133.4	-0.9%
◆ Nabisco Ritz	\$570.3	1.3%	185.1	-1.3%	182.1	1.1%
◆ Nabisco Triscuit	\$348.0	0.9%	122.2	0.3%	69.8	1.3%
◆ Nabisco Wheat Thins	\$321.5	0.8%	109.0	-0.8%	73.3	-0.2%
◆ Private Label	\$267.4	3.2%	132.6	1.2%	84.1	2.1%
◆ Snack Factory Pretzel Crisps	\$237.2	5.0%	68.8	2.1%	40.9	4.9%
◆ Total Crackers with Fillings	\$879.7	-4.0%	353.7	-8.6%	228.8	-5.9%
◆ Nabisco Ritz	\$153.8	-8.2%	48.6	-12.1%	35.6	-10.2%
◆ Lance ToastChee	\$105.5	-4.6%	43.0	-7.2%	37.2	-5.7%
◆ Ferrero Nutella & Go	\$87.8	20.6%	29.5	4.3%	8.3	24.2%
◆ Austin	\$83.6	-10.9%	35.5	-18.8%	30.4	-11.5%
◆ Lance Toasty	\$65.7	0.1%	23.4	-5.1%	22.3	-3.1%
◆ Lance Captain's Wafers	\$58.3	-0.6%	24.5	-3.8%	17.1	0.0%
◆ Nabisco Ritz Bits	\$52.9	-4.7%	19.7	-2.3%	10.7	-2.1%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

“‘Hot’ is the No. 1 most requested Goldfish flavor across social, so we wanted to bring the heat with an unexpected partnership between Goldfish and Frank’s that fans will love.”

Janda Lukin, chief marketing officer, Campbell Snacks



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TOP

CRACKER SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Crackers	\$7,599.0	0.6%	2,606.2	-2.5%	1,882.0	-1.1%
◆ Cheez-It	\$876.7	4.5%	268.0	-0.8%	224.4	2.7%
◆ Pepperidge Farm Goldfish	\$588.1	-2.2%	187.7	-1.2%	133.4	-0.9%
◆ Nabisco Ritz	\$570.3	1.3%	185.1	-1.3%	182.1	1.1%
◆ Nabisco Triscuit	\$348.0	0.9%	122.2	0.3%	69.8	1.3%
◆ Nabisco Wheat Thins	\$321.5	0.8%	109.0	-0.8%	73.3	-0.2%
◆ Private Label	\$267.4	3.2%	132.6	1.2%	84.1	2.1%
◆ Snack Factory Pretzel Crisps	\$237.2	5.0%	68.8	2.1%	40.9	4.9%
◆ Stacy's	\$216.0	4.3%	58.3	3.2%	36.0	4.0%
◆ Pepperidge Farm Flavor Blasted Goldfish	\$197.5	10.7%	63.7	10.7%	44.7	12.1%
◆ Nabisco Ritz Fresh Stacks	\$157.1	-2.4%	57.1	-3.0%	42.0	-3.0%
◆ Keebler Club	\$142.6	-45.3%	45.7	-48.5%	42.6	-45.9%
◆ Keebler Townhouse	\$131.7	-8.1%	46.4	-11.8%	35.0	-11.9%
◆ Kellogg's Club	\$113.4		38.1		32.7	
◆ Pepperidge Farm Goldfish Colors	\$112.4	-3.3%	36.3	-4.5%	24.1	-2.8%
◆ Nabisco Ritz Toasted Chips	\$102.0	9.8%	35.7	11.0%	18.1	11.0%
◆ Total Crackers with Fillings	\$879.7	-4.0%	353.7	-8.6%	228.8	-5.9%
◆ Nabisco Ritz	\$153.8	-8.2%	48.6	-12.1%	35.6	-10.2%
◆ Lance Toast Chee	\$105.5	-4.6%	43.0	-7.2%	37.2	-5.7%
◆ Ferrero Nutella & Go	\$87.8	20.6%	29.5	4.3%	8.3	24.2%
◆ Austin	\$83.6	-10.9%	35.5	-18.8%	30.4	-11.5%
◆ Lance Toasty	\$65.7	0.1%	23.4	-5.1%	22.3	-3.1%
◆ Lance Captain's Wafers	\$58.3	-0.6%	24.5	-3.8%	17.1	0.0%
◆ Nabisco Ritz Bits	\$52.9	-4.7%	19.7	-2.3%	10.7	-2.1%
◆ Lance	\$45.8	-4.4%	13.1	-2.7%	13.1	-3.9%
◆ Private Label	\$42.7	-17.7%	28.5	-13.1%	12.3	-18.1%
◆ Keebler	\$35.8	-6.6%	17.2	-9.6%	9.3	-4.3%
◆ All Lance Products	\$25.3	-2.9%	7.5	-5.0%	7.6	-3.8%
◆ Frito-Lay Munchies	\$20.1	4.1%	11.1	0.4%	6.8	4.5%

Source: IRI

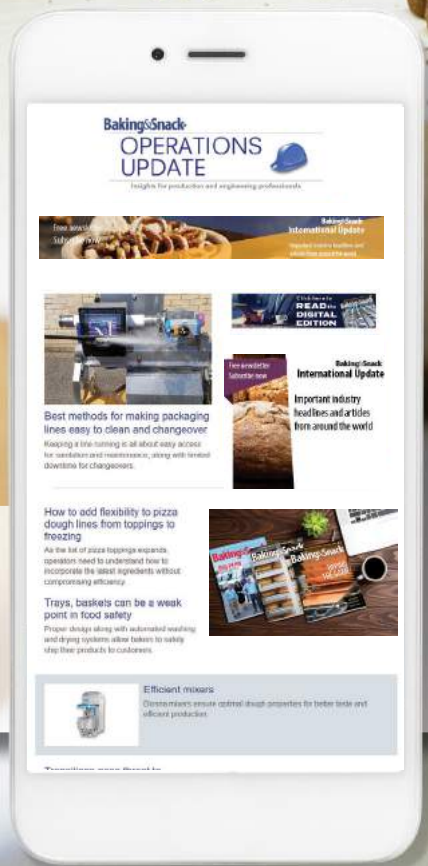
Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

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SWEET ON COOKIES

Snackers embrace indulgent and better-for-you treats.

Consumers gobbled up cookies over the last year, not only boosting dollar sales but also eating them all day long.

“Traditionally, cookies were enjoyed in the afternoon or evening, but today consumers are eating them during all day parts, and especially as people have been confined to their homes,” said Sally Lyons Wyatt, IRI executive vice president and practice leader. “Producers are responding with cookies that appeal to consumer needs throughout the day, whether an indulgent pleasure or a BFY cookie with health benefits.”

Consumers have typically reached for cookies to indulge and satisfy their sweet tooth, but they are now reaching for treats that provide health benefits and those with health claims such as low sugar, gluten-free or contain probiotics, Ms. Lyons Wyatt said in a presentation earlier this year, “The Snacking Frenzy in 2021 and Beyond.”

Dollar sales for this category rose 2.6% for the 52 weeks ending May 16, 2021, even with the surge in buying at the beginning of the pandemic last spring.

“Packaged cookies continue to do well in 2021,” Ms. Lyons Wyatt said. “Again, diversity of choices is what consumers want, such as limited-time offers, experience, fun flavor combinations and co-branding creating a retro or exciting twist on old favorites.”

One such limited-time offer this summer was from Oreo, which honored Olympic Team USA with a triple-stuffed cookie with red, white and blue crème. The cookies also added the twist of some popping candy inside. And the chocolate sandwich cookies had an American flag and the Olympic rings etched on them.

— Michelle Smith



CATEGORY INNOVATIONS

- ◆ Many snackers want indulgence paired with portion control. Bite-sized snacks and individual pouches give snackers a tasty treat without going overboard.
- ◆ Clean labels are attracting consumers who want real ingredients in their foods. **Pepperidge Farm**, which added Butter Pecan to its Thin & Crispy lineup this year, boasts real ingredients, including butter, eggs and vanilla extract.
- ◆ Consumers who want snacks that taste good but also offer health benefits are reaching for cookies with fruit, nuts and more. **Mondelez International** offered limited-edition Blueberry Crisp Cookies, which are made with dried blueberries.
- ◆ Seasonal and limited edition offerings respond to those seeking variety and so do mashups of popular brands, like the Chips Ahoy! cookies made with Reese's Pieces and Hershey's chocolate.

TOP COOKIE BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Cookies	\$8,861.5	2.6%	2,984.4	-2.9%	2,391.4	-1.0%
◆ Private Label	\$1,441.5	-1.6%	567.8	-5.9%	504.5	-5.8%
◆ Nabisco Oreo	\$837.9	1.5%	226.6	-8.5%	253.7	0.8%
◆ Nabisco Chips Ahoy!	\$717.8	7.5%	232.7	2.2%	211.7	5.5%
◆ Belvita	\$392.7	-3.3%	107.0	-6.5%	76.6	-1.7%
◆ Nabisco Oreo Double Stuf	\$372.1	9.2%	102.9	1.2%	122.0	7.5%
◆ Little Debbie	\$267.7	-1.7%	117.6	-8.2%	131.5	-1.5%
◆ All Nabisco Products	\$183.7	18.7%	26.3	14.0%	41.7	17.4%
◆ Nabisco Nilla	\$183.5	6.3%	54.4	2.9%	36.1	6.6%
◆ Pepperidge Farm Milano	\$183.0	-0.3%	56.8	-2.0%	24.5	-2.9%
◆ Little Debbie Nutty Bars	\$182.9	1.7%	79.0	-1.9%	75.4	-0.3%
◆ Nabisco Nutter Butter	\$148.0	18.3%	41.9	14.7%	35.0	20.2%
◆ Voortman Bakery	\$135.3	5.8%	50.6	5.8%	29.0	-0.4%
◆ Tate's Bake Shop	\$119.8	16.0%	24.8	13.9%	11.1	15.3%
◆ Lofthouse	\$113.8	-5.0%	30.5	-2.7%	26.3	-4.2%
◆ Nabisco Newtons	\$108.5	7.0%	32.7	2.2%	24.1	7.6%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.





“What’s happened with cookies is happening with other categories. The more you innovate and/or communicate the benefits, either through different occasions, different day parts, different diets, whatever it might be, the better chance you’re going to continue to see compounded growth year after year.”

Sally Lyons Wyatt, IRI executive vice president and practice leader



TOP

COOKIE SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Cookies	\$8,861.5	2.6%	2,984.4	-2.9%	2,391.4	-1.0%
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◆ Nabisco Oreo	\$837.9	1.5%	226.6	-8.5%	253.7	0.8%
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◆ Nabisco Nilla	\$183.5	6.3%	54.4	2.9%	36.1	6.6%
◆ Pepperidge Farm Milano	\$183.0	-0.3%	56.8	-2.0%	24.5	-2.9%
◆ Little Debbie Nutty Bars	\$182.9	1.7%	79.0	-1.9%	75.4	-0.3%
◆ Nabisco Nutter Butter	\$148.0	18.3%	41.9	14.7%	35.0	20.2%
◆ Voortman Bakery	\$135.3	5.8%	50.6	5.8%	29.0	-0.4%
◆ Tate's Bake Shop	\$119.8	16.0%	24.8	13.9%	11.1	15.3%
◆ Lofthouse	\$113.8	-5.0%	30.5	-2.7%	26.3	-4.2%
◆ Nabisco Newtons	\$108.5	7.0%	32.7	2.2%	24.1	7.6%
◆ Nabisco Oreo Thins	\$99.8	-28.7%	29.3	-36.1%	19.8	-29.5%
◆ Keebler Fudge Stripes	\$92.8	-11.6%	34.6	-19.3%	24.3	-17.4%
◆ Stauffer's	\$85.0	-5.2%	39.9	-5.9%	43.8	-8.6%
◆ Nabisco Golden Oreo	\$81.2	-3.1%	23.0	-11.0%	25.5	-3.4%
◆ Nature Valley	\$72.0	-0.0%	18.9	-0.7%	12.0	-2.7%
◆ Little Debbie Fudge Round	\$67.1	5.1%	26.7	-2.6%	25.4	4.8%
◆ Famous Amos	\$63.7	4.7%	16.2	-4.9%	19.3	4.0%
◆ Keebler Sandies	\$59.0	5.1%	20.6	-1.4%	15.5	-0.0%
◆ Nabisco Lorna Doone	\$54.9	18.4%	13.9	13.3%	9.4	17.6%
◆ Nabisco Golden Double Stuf Oreo	\$50.0	12.6%	14.1	4.0%	16.4	12.3%
◆ Nabisco Teddy Grahams	\$47.7	1.2%	14.7	-1.1%	9.3	1.9%
◆ Pepperidge Farm Chessmen	\$46.8	16.9%	14.4	14.8%	6.4	15.8%
◆ Nonni's	\$46.6	8.4%	12.4	1.5%	6.4	-0.7%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

HEALTHY HALO BARS

Bar sales stumbled recently, but many new BFY protein bars are showing up.



While snackers were snapping up chips, cookies and other favorites during the coronavirus (COVID-19) pandemic, nutritional bars and granola bars didn't fare as well. The closing of gyms along with a shift in active lifestyles and grab-and-go consumer purchase patterns put a dent in sales of bar brands.

"The single biggest way that snacking behavior and consumption changed is that more consumption is taking place in the home, and less consumption is taking place outside of the home — at work, school, etc.," noted Tom Vierhile, vice president of strategic insights, North America, Innova Market Insights. "For categories like Snack Bars that may be heavily reliant on consumption in places like school, this past year has been a challenge. It's also been a challenge for retailers like convenience stores with trips to stores down and reduced potential for impulse sales."

Dollar sales of all Snack Bars dropped 4.6% for the 52 weeks ending May 16, 2021, while Nutritional/Health Food Bars were down 6.8% and Granola Bars fell 9.2%. However, Breakfast and Cereal Bars were up 4.2% over the period.

Many snack makers appear to be betting that demand for protein bars will grow as better-for-you products with vegan, gluten-free and plant-based protein claims are now popping up.

Some of the new entrants include Nature Valley Protein Crunch Bars, Think! Products' High Protein Crisp Bars and BLD Bars, which offer savory flavors like Margarita Lime and Smoky BBQ.

— Michelle Smith

CATEGORY INNOVATIONS

- ◆ Bars offering clean label, vegan, gluten-free, keto-friendly and protein claims are can be found in many new products. For instance, new B.T.R. Bars check a lot of better-for-you boxes.
- ◆ Plant-based protein bars are drawing the attention of vegan consumers. RXBAR, a subsidiary of **Kellogg Company**, recently launched its first plant-based product, replacing egg white protein found in its other bars with pea and almond protein.
- ◆ Gut health is a concern for many, and LUNA, a brand owned by **Clif Bar & Co.**, answered those concerns with the first nationally available bar with prebiotics in its category.
- ◆ One new product being marketed as a post-workout muscle recovery bar contains CBD. **Etera Foods'** The After Bar is also vegan, soy-free, gluten-free and non-GMO.

TOP BAR BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Snack Bars/Granola Bars	\$5,430.4	-4.6%	1,477.0	-11.4%	810.0	-4.0%
◆ Nutritional/Intrinsic Health Value Bars	\$2,654.8	-6.8%	660.2	-15.4%	282.8	-5.4%
◆ Clif Bar	\$341.7	-8.1%	87.5	-16.1%	51.4	-9.0%
◆ Atkins	\$233.5	-5.5%	27.3	-9.8%	18.0	-7.1%
◆ Nature Valley Protein	\$138.9	-2.1%	27.5	-3.2%	21.6	-0.4%
◆ Breakfast/Cereal/Snack Bars	\$1,447.0	4.2%	420.2	-5.1%	242.5	1.4%
◆ Kellogg's Rice Krispies Treats	\$297.3	7.9%	80.8	-1.9%	59.4	8.2%
◆ Private Label	\$173.2	0.2%	60.8	-9.8%	49.2	-4.7%
◆ Larabar	\$131.0	-17.5%	47.3	-26.2%	13.5	-16.5%
◆ Granola Bars	\$1,300.0	-9.2%	389.7	-11.1%	281.9	-7.3%
◆ Nature Valley	\$253.6	-7.1%	65.0	-9.9%	61.6	-5.0%
◆ Quaker Chewy	\$239.3	-9.8%	68.7	-11.4%	56.6	-9.5%
◆ Nature Valley Sweet & Salty Nut	\$214.1	-6.7%	62.3	-8.2%	41.2	-6.0%
◆ All Other Snack/Granola Bars	\$28.8	41.7%	6.8	14.6%	2.8	42.6%
◆ Private Label	\$7.3	43.2%	1.9	36.0%	1.0	39.7%
◆ Slim Fast	\$2.9	59.6%	0.3	67.3%	0.2	70.3%
◆ KIND Clusters	\$2.8	50.9%	0.3	26.9%	0.2	77.9%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



A CONVERGENCE OF TRENDS

Corn snacks intersect flavors and health messaging.

Corn Snacks benefitted from increased at-home eating and a growing interest in spicy and interesting flavors. The entire category saw 6.2% dollar sales growth in the 52 weeks ending May 16, 2021. Fritos still hold the lead in the category as the top three snack brands in dollar sales, but Xochitl, Sabritas Turbo and Barcel Churritos Fuego saw double- and even triple-digit growth in dollar sales.

In contrast, Barritos Churritos saw a 45.2% decline in dollar sales, indicating that consumers want corn snack brands to bring the heat.

Popcorners also saw double-digit growth across dollar sales, unit sales and volume sales. This brand positions itself as a guilt-free indulgence that crosses over cheesy, spicy, sweet and salty flavors.

The Corn Snack category showed itself to be versatile, touching on all the trends that took the lead in 2020: comfort snacks, spicy and innovative flavors, and nutrition.

— Charlotte Atchley



CATEGORY INNOVATIONS

- ◆ **Popcorners'** positioning as a guilt-free indulgence has allowed it to capitalize off other health messaging like protein and benefit from flavor trends.
- ◆ Corn Snacks centered on spicy flavors saw double- and even triple-digit growth during 2020.
- ◆ **Frito Lay's** Fritos brand continues to dominate the Corn Snacks category with three of the top spots in IRI data.

TOP CORN SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Corn Snacks	\$989.3	6.2%	360.0	1.7%	198.0	-1.0%
◆ Fritos	\$383.0	4.4%	134.5	-0.1%	72.0	-1.5%
◆ Fritos Scoops	\$261.0	2.6%	75.9	-1.8%	53.1	-7.3%
◆ Fritos Flavor Twists	\$88.5	7.1%	33.3	1.8%	15.8	-1.0%
◆ Popcorners	\$79.5	29.8%	27.2	26.0%	11.6	24.9%
◆ General Mills Bugles	\$48.9	-9.5%	26.7	-8.2%	12.2	-9.7%
◆ Xochitl	\$33.0	14.8%	7.9	15.3%	6.5	14.4%
◆ Private Label	\$23.9	-9.6%	21.0	-3.6%	12.8	-4.4%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.

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THE **snack** THAT GROWS ON TREES

Plant-based claims benefit the Nuts and Seeds category.

Nothing says all natural more than a snack that was picked from a plant. With post-pandemic health-consciousness and a consumer desire to see environmental friendliness and sustainability at the top of every company's agenda, it's no wonder that nut sales increased for the 52 weeks ending May 16, 2021. Sunflower and pumpkin seed dollar sales were up 3.7% altogether, and that can likely be attributed to the increase of plant-based claims in 2020.

Plant-based product launches nearly doubled from 2019 to 2020, said Tom Vierhile, vice president of strategic insights North America, Innova Market Insights, increasing just over 89% during that period.



"The hot category there was 'Snack Nuts and Seeds,' which saw plant-based launches rise over 400%," he said.

Though the snack simply comes from the earth, brands are ensuring Nuts and Seeds don't become plain or boring. This category is seeing flavor-packed versions stocking the shelves, with a popular focus on heat, including Takis Hot Nuts and Blue Diamond's new Ghost Pepper Xtremes. It turns out most any flavor goes with nuts, from barbecue to cheddar cheese or cinnamon churro.

— Makayla Nicholis



CATEGORY INNOVATIONS

- ◆ As with every other snack category, consumers are demanding that brands bring the heat. Takis offers a variety of Hot Nuts flavors, and Blue Diamond has challenged consumers' limits with Xtremes, such as Ghost Pepper.
- ◆ Clif Bar has taken the effort of scooping up individual nuts and seeds and crafting them into clusters. The brand makes the snack salty and savory with rich flavors.
- ◆ Nuts sometimes go in desserts, and sometimes they're tossed in salads. Brands like **Diamond** are proving the flexibility of the snack by coating nuts with sweet flavors, like Dark Chocolate or Cinnamon Churro; spicy flavors, like Chile Lime; and salty flavors, like Teriyaki and Wasabi.

TOP

NUT AND SEED BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Snack Nuts	\$4,549.6	4.1%	882.1	-1.0%	750.2	4.1%
◆ Private Label	\$1,847.2	8.9%	326.6	6.5%	321.9	9.7%
◆ Planters	\$795.2	3.5%	157.4	3.9%	145.7	2.2%
◆ Wonderful	\$741.8	11.6%	104.3	4.2%	74.2	3.7%
◆ Blue Diamond	\$469.4	-6.6%	86.3	-4.9%	62.0	-1.9%
◆ Emerald	\$95.1	-6.7%	30.7	-6.2%	10.0	-5.2%
◆ Hampton Farms	\$75.5	7.3%	23.9	4.5%	41.3	8.0%
◆ Planters Nutrition	\$45.2	-12.3%	7.6	-13.3%	4.4	-12.9%
◆ Total Sunflower/Pumpkin Seeds	\$223.7	3.7%	106.8	-3.3%	45.7	1.5%
◆ David	\$63.5	-0.2%	32.5	-0.9%	13.9	-2.3%
◆ Private Label	\$61.9	13.4%	25.0	11.3%	13.8	15.1%
◆ Good Sense	\$12.1	9.2%	4.8	2.8%	2.6	4.4%
◆ Bigs	\$8.8	2.7%	4.2	-2.7%	1.4	0.7%
◆ Frito-Lay	\$8.6	-25.7%	14.9	-27.2%	1.8	-25.3%
◆ Spitz	\$5.6	-3.9%	3.3	-4.4%	1.4	-5.6%
◆ Bigs Vlasic	\$4.7	-0.3%	2.8	-5.5%	0.9	-5.4%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



“Identifying products — even indulgent products like nuts — as ‘plant-based’ is one way in which companies are punching the permissible indulgence ticket.”

Tom Vierhile, vice president of strategic insights North America, Innova Market Insights

STILL CRAVING CHEESE

Consumers seek innovative Cheese Snacks in the wake of pandemic trends.

There is no doubt consumers turned to comfort snacks over the course of the pandemic, and that made Cheese Snacks a priority. The classic favorites, such as Cheetos and Utz Cheese Balls, remained fairly consistent in sales compared to the previous year, while sales of other brands such as Munch King and Circus Time skyrocketed.

Parmcrisps, a keto-friendly cheese snack brand, saw a huge increase in volume sales of 58.8% over the 52 weeks ending May 16, 2021. Another keto-friendly snack that rose by 24.9% volume sales is Whisps, a cheese crisp that not only offers a wide variety of flavors, from Hot & Spicy to Tomato Basil, but also is gluten-free with as little as 0 grams of sugar. This consumer desire for low-carb, health-conscious snacks is an indicator of the better-for-you mindset of pandemic snacking.

Meanwhile, Cheez-It Snap'd saw a volume increase of 38% over the same period, suggesting that consumers are looking for new or adventurous formats of familiar, reliable snacks. One exception is puffed products, which remain as popular as always through heavy flavor application, such as Blazin' Hot from Turkey Creek Snacks.

A brand that took a huge hit in the cheese snack category for this period was Planters, which may reflect a lack of innovation as the brand offered only its classic Cheez Curls and Cheez Balls.

The recent release of new flavors will likely help Planters, acquired this year by Hormel Foods, to become relevant again in this category.

— Makayla Nicholis



CATEGORY INNOVATIONS

- ◆ The call for new products in the cheese category is leading to the expansion of flavors with added heat, like Whisps' Hot & Spicy and Turkey Creek's Blazin' Hot.
- ◆ New formats of familiar snacks like with Ritz Cheese Crisps or Cheez-It Snap'd can provide adventure without risk for consumers..
- ◆ Cheese is still cheese, even with other ingredients stacked on top, and consumers are enjoying the blending of flavors. **Planters** hopped on board by adding Jalapeño Cheddar, Blazin' Hot and Nacho Cheez to its classic Cheez Balls snack.

TOP

CHEESE SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Cheese Snacks	\$2,248.7	8.2%	847.4	0.7%	374.0	2.0%
◆ Cheetos	\$1,400.3	5.8%	546.3	-0.2%	244.0	-0.4%
◆ Cheez-It Snap'd	\$130.0	32.1%	42.3	26.7%	21.0	38.0%
◆ Simply Cheetos	\$109.0	13.0%	33.6	8.6%	16.6	12.9%
◆ Chester's	\$99.0	-1.9%	45.8	-9.4%	11.0	-10.3%
◆ Utz	\$81.1	0.0%	16.0	-5.0%	21.0	-4.8%
◆ Private Label	\$63.3	6.4%	29.0	-7.9%	14.2	-6.2%
◆ Whisps	\$58.3	22.4%	15.0	20.0%	2.2	24.9%
◆ Baked Cheetos	\$41.1	9.3%	13.9	9.6%	6.3	6.5%
◆ Parmcrisps	\$28.0	49.9%	7.0	48.8%	9.3	58.8%
◆ Wise Cheez Doodles	\$23.0	-9.0%	14.6	-13.9%	5.7	-11.5%
◆ Cheetos Paws	\$22.4	-1.7%	7.3	-10.0%	3.7	-8.2%
◆ Herr's	\$19.5	-1.9%	9.6	-4.4%	4.0	-2.1%
◆ Planters	\$11.5	-14.7%	5.7	-16.6%	1.0	-21.3%
◆ Bachman Jax	\$11.0	3.0%	4.0	2.7%	2.3	3.5%
◆ Cheez-It	\$10.5	-	2.2	-	1.7	-

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



“Extruded corn snack segments and specifically puffed products have also remained popular through use of heavy seasoning application.”

Matt Colford, director of marketing and strategic selling, North America, Old Dutch Foods

THESE AREN'T YOUR DAD'S PORK RINDS

Keto diet expands consumer base for the carb-free snacks.

As the popularity of the keto diet has risen, so too have Pork Rinds. Not only are consumers eating them as snacks in a wider array of flavors, they are incorporating them into low-carb recipes to add a crunch to a variety of foods.

"We were wondering how keto would fair during COVID," said Mark Singleton, vice president of sales and marketing at Rudolph Foods. "We are seeing more interest in keto and protein-driven bites than even before the epidemic, and we think there's going to be a lot of potential for the category as a whole."

The number of consumers eating pork rinds has

risen, Mr. Singleton said, adding that college-educated women are boosting the rise of the company's Southern Recipe brand.

Dollar sales of Pork Rinds increased 6.9% for the 52 weeks ending May 16, 2021, but some players in the industry saw double-digit growth.

Dollar sales of the No. 1 seller Benestar Brands' Mac's Pork Rinds rose 18.1% to nearly \$112 million, Utz Brands' Golden Flake pork skins climbed 16.3% to more than \$41 million, and Rudolph's Southern Recipe Pork Rinds were up 21.2% to \$10.8 million.

— Michelle Smith



"We were in 5,000 restaurants before COVID and over 3 dozen ballparks and stadiums, so they're getting pork rinds included in nachos, they're going on sandwiches, they're getting them in other places and in other contexts."

Mark Singleton, vice president of sales and marketing at Rudolph Foods

CATEGORY INNOVATIONS

◆ Snackers are responding to limited-edition flavors that correspond with the seasons. **Rudolph** launched Hatch Chile pork rinds to correspond with the season, and the company will bring back Apple Cinnamon and Cranberry Jalapeño pork rinds this fall.

TOP PORK RIND BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total Pork Rinds	\$396.6	6.9%	181.7	-1.2%	50.6	6.4%
◆ Mac's	\$111.9	18.1%	46.2	2.9%	18.0	16.3%
◆ Baken-ets	\$50.3	-22.7%	22.8	-28.6%	4.5	-24.3%
◆ Private Label	\$47.3	7.6%	22.0	6.8%	8.4	8.4%
◆ Golden Flake	\$41.1	16.3%	21.6	12.7%	4.6	14.2%
◆ Mission	\$13.0	15.9%	5.4	16.8%	1.3	16.8%
◆ Southern Recipe	\$10.8	21.2%	3.5	13.6%	0.8	18.3%
◆ Epic	\$9.0	60.7%	2.3	50.6%	0.4	75.7%
◆ 4505	\$7.8	17.7%	2.0	23.3%	0.3	19.9%
◆ Brim's	\$7.6	39.0%	5.8	51.4%	1.1	43.2%
◆ Mambi	\$6.4	0.0%	2.3	-2.8%	0.8	0.0%
◆ Utz	\$5.8	8.2%	2.4	3.0%	0.5	8.7%
◆ Guerrero	\$5.4	4.8%	1.6	4.4%	0.5	4.8%
◆ Mac's Golden Cracklins	\$5.3	75.2%	1.3	67.0%	0.7	72.6%
◆ Turkey Creek	\$4.3	-36.9%	3.4	-40.7%	0.7	-41.6%
◆ Golden Flake Curly Q's	\$3.8	-3.4%	2.1	-4.2%	0.4	-4.2%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



THE RESPONSIBLE CARNIVORE

Meat snackers want environmentally friendly ingredients.

The lack of freedom to travel over the past year proved that jerky is not just confined to road trip cravings. Many top dried meat snack brands such as Slim Jim, Jack Link's and Old Wisconsin saw fair increases in dollar sales in the 52 weeks ending May 16 of this year, with increases ranging from 20% to 35%. Meat snacks are not restricting themselves to meat or the Meat Snacks category, either. Slim Jim has branched out from jerky, adding a new potato snack Fire Fries to its brand, which contain no meat at all. Jack Link's has created the Cold Crafted Linkwich, a breadless sandwich made of salami and various cheeses.

As with most of the food industry, meat snack companies are touting their environmental friendliness. Brands like Carnivore Snax are pushing beyond grass-fed beef and achieving regenerative agriculture with herd movements that reverse soil erosion and store carbon. Patagonia even got in on the movement with its Patagonia Provisions brand of buffalo jerky made from free-roaming Great Plains buffalo. It seems sustainable sourcing and simplifying ingredient lists will remain at the forefront of the Meat Snacks category for the foreseeable future.

— Makayla Nicholis



CATEGORY INNOVATIONS

- ◆ When it comes to jerky, many consumers just want the meat. "The simpler the better" is a motto brands can go by when advertising zero sugar and no added ingredients.
- ◆ Cheese and jerky go together like pit stops and road trips, and many brands are hopping on the bandwagon. **Wenzel's** Bacon Cheddar Sticks blend the two ingredients into a single stick, while **Jack Link's** Cold Crafted Linkwich allows the ingredients to sit in layers, like a breadless sandwich.

TOP MEAT SNACK BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total All Other Dried Meat Snacks	\$976.2	23.5%	320.0	11.0%	75.3	24.5%
◆ Slim Jim	\$347.2	20.7%	126.5	4.8%	27.5	21.2%
◆ Jack Link's	\$186.6	25.6%	64.1	13.7%	10.1	23.4%
◆ Old Wisconsin	\$103.9	35.0%	14.1	27.5%	12.4	39.0%
◆ Private Label	\$51.3	20.0%	10.9	11.3%	4.9	15.8%
◆ Duke's	\$33.4	7.7%	5.6	-3.2%	2.1	7.2%
◆ Tillamook Country Smoker	\$21.5	49.4%	7.7	8.9%	1.3	37.5%
◆ Old Wisconsin Turkey Bites	\$19.6	17.0%	6.4	17.6%	1.7	17.2%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



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STRAIGHT OUT OF A MOVIE

Blockbuster performance fuels expectations for the Popcorn market.



As the movie theaters remained closed, popcorn emerged as a fan favorite for streaming movies, binge watching and other forms of at-home entertainment. The savory snack became among the top-selling munchie in terms of consumption in 2020, and its surge is expected to continue.

The category is forecasted to rise 8.3% by 2023 versus lofty 2020 levels, which would make it the fastest-growing snack, according to The NPD's Group's "Future of Snacking Report." In fact, The NPD Group noted that all forms of snacking benefitted from consumers who bought bigger and better TVs throughout 2020, and total consumer spending on video gaming continued to break records, reaching \$18.6 billion in the last quarter of 2020. As a result, expect the binge watching — and snacking — to remain strong, despite the reopening of theaters.

During the past year, not only did ready-to-eat (RTE) popcorn jump at a double-digit rate, volume and unit sales experienced a strong single-digit pop. Relative newcomer, Cheetos Popcorn from Frito-Lay, broke into the category and was named a 2020 IRI New Product Pacesetter, the only snack in the Top 10. Other brands like SkinnyPop from Amplify Snack Brands and Cretors bolstered the category with best-acting performances.

— Dan Malovany

CATEGORY INNOVATIONS

- ◆ Sweet-flavored popcorn is taking center stage with new varieties like Candy Pop Snickers popcorn, **Cretors** dark chocolatey-flavored variety and Smartfood cobranding with other food companies to create glazed donut-flavored popcorn, to name a few.
- ◆ The battle for being the big cheese in popcorn now includes **Frito-Lay's** Cheetos Popcorn and Crunch Pop Mix and Cheez-It Popcorn with **Kellogg Company** rolling out a Cheez-It Loaded Popcorn this year for a limited-time only.
- ◆ Ethnic and hot-flavored popcorn are making inroads into popcorn with **Snak King's** El Sabroso brand cobranding with Tapatio to create Salsa Picante and Salsa Picante & Lemon varieties and **Herr's** Fire Roasted Sweet Corn Flavored Popcorn that also comes in a Firey Hot option.

TOP POPCORN BRANDS

PRODUCT	Dollar Sales (\$mil)	% Change	Unit Sales (mil)	% Change	Volume Sales (mil lb)	% Change
◆ Total RTE Popcorn/Caramel Corn	\$1,399.7	10.3%	452.6	5.9%	195.2	5.0%
◆ Smartfood	\$332.1	5.2%	113.6	2.8%	42.7	-5.4%
◆ SkinnyPop	\$258.9	15.0%	66.7	10.2%	26.6	14.2%
◆ Angie's Boom Chicka Pop	\$139.7	9.5%	42.6	10.0%	17.4	12.0%
◆ Private Label	\$81.5	-7.7%	33.5	-13.6%	14.6	-12.4%
◆ Cheetos	\$70.8	113.3%	25.4	95.7%	9.3	97.4%
◆ SkinnyPop SkinnyPack	\$61.0	9.1%	11.8	6.6%	2.9	6.6%
◆ G.H. Cretors	\$33.2	32.4%	7.9	30.7%	6.7	30.2%
◆ Crunch 'n Munch	\$32.8	5.0%	24.0	1.6%	10.0	1.9%
◆ Popcorn Indiana	\$32.6	-14.9%	8.9	-15.5%	4.7	-17.7%
◆ Wise	\$18.1	1.3%	9.1	-1.7%	2.9	0.7%
◆ Smartfood Smart 50	\$18.1	418.6%	5.8	430.9%	1.9	429.2%
◆ Cracker Jack	\$17.2	-17.0%	9.9	-15.4%	3.1	-17.7%
◆ Gourmet Select	\$15.7	-1.9%	3.1	-4.8%	3.5	-6.1%
◆ Jays O-Ke-Doke	\$15.5	-18.5%	5.8	-20.3%	2.5	-19.1%
◆ Popcornopolis	\$15.4	11.0%	2.9	18.8%	2.7	58.1%

Source: IRI

Total US Multi-outlet | 52 Weeks Ending 5-16-21 | Note: Many companies may have multiple brand listings in the IRI data.



products & SERVICES



◆ CEREAL BAR SOLUTION

The SnackFix from **Bühler** is a new process for small-batch cereal bar production. The cereal blend is mixed continuously with a binder in the mass preparation unit. After mixing, the mass is fed to the transport belt, formed to a continuous product slab by two equalizing rollers and then cut to the desired product width. The flexible, modular design lends itself to the industrial production of a variety of cereal bars as well as smaller seasonal runs.

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www.incomec.be



◆ VEGETABLE STRAW SNACKS

Leng-d'Or vegetable straws are a great source of energy, thanks to carefully selected potato, spinach and tomato ingredients. They are designed for brands wanting to reach health-conscious consumers who don't want to sacrifice taste. The vegetable straws are available in vegan, gluten-free, kosher, organic, vegetarian and low-fat versions.

www.lengdor.com

◆ SNACK MOISTURE CONTROL

The IR-3000 moisture sensor from **MoistTech** meets all moisture control requirements for snack food. The sensor is accurate within 0.1%. It measures moisture levels during the baking process and is coated in a food-grade Teflon with a polymeric viewing window enabling manufacturers to improve product quality without risk of contamination.

(941) 229-8096 • www.moisttech.com



◆ CLEAR BARRIER

Printpack's Clear Barrier provides product visibility without sacrificing shelf life. Ultra-high, high or moderate barrier options prevent food waste and ensure that the product stays in its original package for continuous branding from store to pantry. With various product performance demands, Printpack offers customizable options for all vertical and horizontal form/fill/seal, lidding and pre-made pouches to increase visibility in the market.

(404) 460-7000 • www.printpack.com



◆ CONTINUOUS MIXER

Reading Bakery Systems' Exact Mixing MX Continuous Mixer is well-suited for producing a wide range of products, including snacks, batters, icings and pastes. It can also be used as a first-stage mixer for processes that require cream up and pre-blend stages. Using the company's advanced Hydrobond Technology allows for a shorter mixer, a faster mixing process and lower energy costs.

(610) 693-5816 • www.readingbakery.com



◆ CHILE PORK RINDS

Hatch chiles are a staple in the Southwest but have found success nationwide as shoppers look for more regional flavors to bring to each eating occasion. Southern Recipe Small Batch Hatch Chile pork rinds are popped in sunflower oil to achieve a lightness of flavor, and each batch is dusted with a seasoning that introduces Hatch chile to this crunchy snack. Chili powder and garlic are also predominant flavors found in the coating, making Southern Recipe Small Batch's Hatch Chile pork rinds a one-of-a-kind keto-friendly snack.

(419) 648-3611 • www.southernrecipessmallbatch.com



◆ ON-MACHINE SEASONING SYSTEM

Offering snack producers the potential for a more recipe-focused approach to flavoring, **TNA's** intelli-flav 5.1 is an on-machine seasoning system capable of handling powder flavorings and liquid oil in a single drum. The hygienically designed system delivers uniform and consistent seasoning coverage, creating craveable snacks and candies that meet consumer expectations.

(972) 462-6500 • www.tnasolutions.com



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The Andersons, Inc. www.andersonsfood.com	53	Douglas Machines Corp. www.douglmac.com	21	Lesaffre Yeast Corp./Red Star www.lesaffreyeastcorp.com	27	Rudolph Foods Co., Inc. www.rudolphfoods.com	2-3
Biospringer www.biospringer.com	27	Focke & Co. www.focke.com	26	MoistTech Corp. www.moisttech.com	25	Shick Esteve www.shickesteve.com	4
Brolite Products, Inc. www.bakewithbrolite.com	39	Healthy Food Ingredients www.hfifamily.com	19	The Fred D. Pfening Co. www.pfening.com	45	SNAC International www.snacintl.org	61
Bühler Group www.buhlergroup.com	7	Heat and Control, Inc. www.heatandcontrol.com	68	Printpack Inc. www.printpack.com	22	TNA North America, Inc. www.tnasolutions.com	41
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