

Flavor profiles

The Future of Snack Flavors

The snack category shifts its flavors toward a more nuanced sense of savory

Snacking has been called “the fourth meal.” In 2005, total snack sales tracked by Datamonitor reached \$34.8 billion.* The United States made up \$18.5 billion of this total, with Europe totaling ~\$16.3 billion.

As with breakfast, lunch and dinner, snack options have evolved with consumer tastes—particularly when it comes to health and wellness. During the low-carb heyday, for instance, meat snacks were all the rage, signaling dark days for options such as pretzels. That trend has since reversed itself.

“The United States has become more snack-centric,” says Tom Vierhile, director of Datamonitor’s Productscan Online. “Back in 2000, the United States and Europe were almost tied. The United States had \$14.869 billion; Europe was at \$14.541 billion ... I’m not sure why the US market has taken off like that—maybe there’s just more product innovation as far as new flavors and such.”

The Quest for Healthy and Tasty Snacking

As part of Datamonitor’s Productscan program, the company tracks product claims to map where a category is moving. Based on claims tracked for the year ending March 31, 2007, versus the previous year, says Vierhile, “There’s a push

*Datamonitor defines “snacks” as nuts and seeds, peanuts and sunflower seeds, popcorn and potato chips, other savory snacks such as pretzels, ethnic snacks, snack croutons and processed snacks (corn chips, extruded snacks, tortilla chips). For the purposes of this article, fruit snacks and snack/cereal bars are discussed, though they are not reflected in the sales totals cited.



Snack flavors are increasingly incorporating exotic and nuanced flavor profiles that are, according to Datamonitor’s Tom Vierhile, “un-snacklike,” including Pringles’ Bruschetta varietal.

toward organic and vegetarian snacks. Behind that was ‘low-calories.’ I think what’s going on there is the 100-calorie phenomenon, where a lot of snacks are coming out in pre-packaged portions that are 100 calories or some derivation of that. The third on the list was organic, which is a little bit surprising, but companies are really going all-out on this and it includes some bigger companies too.” Vierhile cites Kraft Foods as a high-profile example. The company has taken some of its flagship brands organic, including *Ritz*, *Wheat Thins* and *Chips Ahoy!*. “There’s an effort there to make snacks appear to be more healthful and try to get away from this whole feeling that snacks are junk food,” says Vierhile.

But not all health claims seem to resonate equally with consumers. Vierhile says that “no genetic modification” claims have fallen as manufacturers apparently have realized that the majority of consumers are “not terribly worried” about genetic modification. “Another [product claim in decline] is high vitamins, which is a little bit surprising. It seems that there’s a limit, in the snack category at least, [to] how healthy you really want to make a product.” Launching products that claim to be high in vitamins, Vierhile says, may not be successful if consumers don’t have an expectation for such healthy aspects.

“Snack bars is a category that really tends to show you where the food fads are,” Vierhile continues, “because companies tend to use these as vehicles to jump on the bandwagon for whatever fad is out there. But they really fell last year—324 launches [for the year ending March 31, 2007] versus 562 in 2005 and 513 in 2004.” Vierhile ascribes this massive drop to the wake left by the fall of low-carb snacking. At the time, there was some thought in the food industry that low-glycemic products would fill the void. “We did see a few bars tout the low-glycemic index,” says Vierhile, “but it never really took off.”

The New Savory

When Vierhile looks over recent snack decliners, the term held in common is “sweet.” But, as one category “falls out of bed,” as the analyst puts it, another picks up the slack. “We’re going back to snack flavors that are more salty,” he says, “more meat-flavored or spice-flavored, and getting away from snacks that may be based on sweet fruit flavors.” Chips, for example, are on the upswing. “In the United States last year, we had 391 chip launches, versus 228 in 2005. That’s been rising steadily since 2000, when we had 196 launches.” Popcorn has risen modestly since 2000, posting 132 launches in 2006, versus 173 in 2005. Vierhile notes that, excluding the spike of launches in 2005, the category’s rise has been steady.

When it comes to flavors, the analyst explains, “The trend is toward more full-bodied flavors—hotter flavors, spicier flavors. ... The fastest-gaining flavor that we looked at is ‘spicy.’ Just the word spicy or spice. Just a generic term like that seems to be posting the best result [in recent product launches]. ‘Roasted’ was right behind it—it jumped eight positions from the prior year. Roasted suggests a heartier flavor, maybe more impactful, a robust flavor.” In addition, Vierhile cites the strong popularity of flavor descriptors such as chili, garlic and barbecue.

“You’re seeing some snack products come out in flavors that are quite un-snacklike,” he continues. “Pringles, for instance, has a *Bruschetta* flavor as well as a *Thai Sweet Chili* flavor. This is a trend we see in snacks where companies have come out with line extensions that [have a stronger] ethnic profile than the traditional snack flavors, like a barbecue or a salt and vinegar or cheese flavor.” The Pringles Select line, for example, boasts

Szechuan Barbecue, Sun Dried Tomato, Parmesan Garlic and *Cinnamon Sweet Potato* varietals. In the United Kingdom, the company offers even more un-snacklike options, including *Tiger Prawn & Crushed Garlic*. Elsewhere, Doritos has launched a *Spicy Sweet Chili* product in France. “As consumers become more familiar with ethnic foods,” explains Vierhile, “they start to understand the nuances between different types of food, like different regions of China, for instance. We [increasingly] see that with Thai-flavored products in the United States.”

In the arena of snacks, flavor is having an effect in the health and wellness arena, too. “I think grain-based chips are something you’re starting to see more of,” says Vierhile. “There’s a belief [among consumers] that it’s better for you because of the whole grains.” He is particularly interested in Snyder’s growing multigrain range, which includes *Jalapeno Red Tortillas, Savory Blue Tortillas, French Onion Sunflower Chips, White Cheddar Puffs* and *Southwestern Cheddar Sunflower Chips*. In addition, grain is making appearances outside the arena of snack chips, as with Nature Valley’s recently launched *Vanilla Nut* varietal of whole grain granola bar.

The Changing Face of Fruit and Vegetable Flavors

When it comes to fruit flavor descriptors, Vierhile says, cranberry is the biggest decliner. “Cranberry may be in the process of being eclipsed by the functional food front,” he explains. “Cranberries are good for you, but there are a lot of new superfruits out there—things like pomegranate that are more exotic than cranberries.” The other antioxidant-rich superfruits he mentions include acai and goji berries. “Although they’re still not showing up in

the top 30 flavors [year ending March 31, 2007],” says Vierhile, “I sense that there might be some switching going on there as companies experiment with other ingredients.” Other flavor descriptors that have recently dropped include honey, raisin, “sweet” and strawberry.

“There’s a lot of product launches out there,” says Vierhile. “Some of the more unique kinds of things we’re seeing are bigger companies trying to experiment with different types of snacks. I think one launch that is kind of interesting is what Frito Lay is trying to do with the Flat Earth product line that is based on fruit, which is a little bit different of an approach.” These baked vegetable chips are reportedly enjoying healthy shelf space in some of the United States’ largest retailers. Varietals include *Apple Cinnamon Grove Flavored Baked Fruit Crisps*, *Farmland Cheddar Flavored Baked Veggie Crisps*, *Peach Mango Paradise Flavored Baked Fruit Crisps* and *Wild Berry Patch Flavored Baked Fruit Crisps*.

Similarly, says Vierhile, Boulder Canyon Natural Foods has launched a varietal of kettle chips called *Spinach and Artichoke*. “It’s unusual to see vegetable flavors in a potato chip-type product—especially a green vegetable like spinach.” Another company, Metz Fresh, has introduced Spinny Chips, organic spinach-infused corn chips. “I don’t mean to represent it as something in which we’re seeing a ton of activity—we’re seeing a trickle of activity. Companies are dabbling in it. In some markets like Asia there’d be more of a temptation to do something like this—especially in things like drinks. In those markets it’s not unusual to have a vegetable-flavored drink that contains 30 different kinds of vegetables, including a lot you’d never think about drinking, like kale, for instance.” Still, says Vierhile, innovative products such as these are worth watching.

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