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Alternative-Ingredient Snacks: United States

January 2017



Highlights

Market Overview

Market Size | Marketing Trends | Demographic Trends | Retail Trends

Industry Structure

Market Leaders

Resources

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Table of Contents

1. Highlights	3
2. Market Overview	4
Market Size	4
Alternative-Ingredient Snack Market Forecast	4
Key Market Drivers	6
Definitions & Terms	6
Alternative Vegetables are the Fastest-Growing Category	7
Chickpeas, Vegetable Blends Key Growth Subcategories	9
Marketing Trends	11
Mondelēz Launches First New Snack Brand in Over a Decade	11
New Pulse-Based Snacks	11
New Alternative Vegetable-Based Snacks	12
New Alternative Grain-Based Snacks	13
Demographic Trends	15
Retail Trends	17
Grocery Stores Top Channel Despite Younger Shoppers	17
3. Industry Structure	19
Market Leaders	19
Top Marketers of Alternative-Ingredient Salty Snacks	20
Top Marketers of Alternative-Ingredient Crackers	21
Top Companies Specialize When Marketing Ingredients	21
Key Marketers by Alternative-Ingredient Category	22
4. About This Report	23
Scope & Method	23
Sources	24
Industry Codes	24
Resources	25

List of Tables & Figures

Figure 1 US Alternative-Ingredient Snack Sales by Product, 2015-2019 (US\$ mil)	4
Table 1 US Alternative-Ingredient Snack Sales by Product, 2015-2019 (US\$ mil)	4
Figure 2 US Alternative-Ingredient Snack Sales by Product Share, 2015-2019 (%)	5
Table 2 Terms Used for Alternative-Ingredient Product Searches	7
Table 3 IRI MULO-Tracked Alternative-Ingredient Snack Sales by Ingredient Category, 2016*	8
Table 4 IRI MULO-Tracked Alternative-Ingredient Snack Growth by Subcategory, 2016*	9
Table 5 Alternative-Ingredient Snack Shopping Indexes by Generation, 2016	18
Table 6 IRI MULO-Tracked Alternative-Ingredient Snack Sales by Top Competitor, 2016*	19
Table 7 Leading Marketers of IRI MULO-Tracked Alt-Ingredient Snack Sales by Category, 2016* (US\$ mil)	22
Table 8 Industry Codes Related to Alternative-Ingredient Snacks	24

About This Report

Scope & Method

This report forecasts US alternative-ingredient snack retail sales in US dollars for 2017-2019. Total sales are segmented by product in terms of salty snacks and crackers. To illustrate historical trends, total sales and the various segments are provided for 2015 and 2016.

This report focuses on the following alternative-ingredient formulation trends within the salty snack and cracker segments of the retail packaged foods market: pulses such as beans, chickpeas (garbanzos), dried peas, and lentils; specialty grain formulations, including multi-grain, whole grain, and ancient grains; and vegetables other than potato used as the primary or secondary ingredient to create the snack. For the sake of brevity, this report refers to these specific products as “alternative-ingredient” snacks, salty snacks, crackers, and so forth – although of course the full spectrum of snacks with alternative ingredients (which can be variously defined) is wider.

The salty snacks segment is defined as containing the following types of snacks: potato chips, tortilla/tostada chips, other salted snacks (not including nuts), pretzels, cheese snacks, corn snacks (not including tortilla chips), ready-to-eat popcorn/caramel corn, and pork rinds. The crackers segment comprises the following major product types: crackers with fillings, or sandwich crackers; graham crackers; saltines; and matzoh, breadsticks, and “all other crackers”. These segments are based on classifications tracked by Information Resources (IRI) InfoScan Reviews, as this dataset provides information on a large percentage of snack sales in the US. However, it is important to note that alternative-ingredient snacks span only a subset of the above salty snack and cracker segments.

Generational cohorts discussed in the report are Millennials (18-34), Gen X (35-49), Baby Boomers (50-69), and the Silent Generation (70 and older).

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

Sources

Alternative-Ingredient Snacks: United States (FF10046) is based on [Snack Food Nutrition Trends: Pulses, Vegetables, and Grains in Salty Snacks and Crackers](#), a comprehensive industry report published by Packaged Facts. The report uses three primary data sources to define the alternative-ingredient snack market in the US: IRI InfoScan Reviews multi-outlet (MULO) data for the 52 weeks ending October 30, 2016; Packaged Facts' own National Consumer Survey, conducted in December 2016; and Simmons National Consumer Survey from Simmons Market Research. Our primary research also includes interviews with snack market experts, on-site examination of retail and service provider venues, and internet canvassing of websites and blogs.

The report is also based upon data collected from field surveys of food retailers in various channels, as well as a wide range of industry sources, including company websites; trade publications; business newspapers and magazines; consumer blogs; annual reports, 10Ks, and other releases from public companies; and information culled from Packaged Facts' extensive snack market research database and report collection.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | Industry Codes Related to Alternative-Ingredient Snacks

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
311423	Dried and Dehydrated Food Mfg	2034	Dried and Dehydrated Fruits, Vegetables, and Soup Mixes
311821	Cookie and Cracker Mfg	2052	Cookies and Crackers
311919	Other Snack Food Mfg	2096	Potato Chips, Corn Chips, and Similar Snacks
333294	Food Product Machinery Mfg	3556	Food Products Machinery

Source: US Census Bureau

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Resources

Packaged Facts

Snack Food Nutrition Trends: Pulses, Vegetables, and Grains in Salty Snacks and Crackers, January 2017

The Freedonia Group

Freedonia Industry Studies

Alternative Sweeteners Market in the US, February 2017

Natural Flavors & Fragrances, October 2016

Retail Ready Packaging, July 2016

World Flavors & Fragrances, March 2016

Food Containers: Rigid & Flexible, February 2016

Freedonia Focus Reports

Alternative Sweeteners: United States

Cheese: United States

Dairy Products: United States

Flavors & Fragrances: United States

Frozen Foods: United States

Gluten-Free Foods: United States

Grain-Based Foods: United States

Healthy-Ingredient Snacks: United States

Ice Cream & Frozen Desserts: United States

Natural & Organic Foods & Beverages: United States

Processed Food: United States

Salty Snacks: United States

Snack Foods: United States

World Flavors & Fragrances

Freedonia Custom Research

Trade Publications

BakeryAndSnacks.com

Bakingbusiness.com

Candy Industry

Confectionery News

Convenience Store News

FoodBev Media

Food Business Review

FoodNavigator-USA.com

About This Report

Food Processing

Progressive Grocer

Snack Food & Wholesale Bakery

Store Brands

Agencies & Associations

Information Resources

National Confectioners Association

Retail Confectioners International

Simmons National Consumer Survey

SNAC International

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission