



# **GROWTH** **SPACES** QUARTERLY

## **THE SNACK** **DISRUPTORS**

Who's Shaping the Future of Snacking?





# Welcome to Growth Spaces!

We're diving into the dynamic world of snacking, where Growth Spaces are aplenty!

As snackers become more intentional, CPG manufacturers are responding with more purposeful product portfolios, whilst satisfying people's growing appetite for discovery.

With traditional eating patterns eroding, snacks are acquiring elevated status, going beyond sustenance and meeting demand for new experiences, and satisfying specific health goals. And with a nod to social media, many players are wooing shoppers with so-called status snacks.

In this issue of Growth Spaces Quarterly, we call out the most important shifts in category dynamics and showcase 'the snack disruptors' – brands pointing to the way ahead.

As you might expect from one of the world's most dynamic categories, there's a lot going on! Chris Foley, President of Campbell Snacks division recently said that 'the snacking industry is experiencing temporary headwinds following years of significant growth' and that 'higher growth is coming from premium and value sectors.' He also declared the supremacy of three major trends: meal replacement, evolving convenience and generational shift.





And as you might expect, it is Gen Z – the world's most prolific snackers – who are leading this shift in eating habits, continuing to drive innovation output, with new flavors, formats and fusions – fueling excitable content bursts across TikTok and YouTube.

Fed on a daily diet of discovery on their social feeds, it is no wonder that we find Gen Z to be the most experimental cohort. They are much less wedded to traditional count lines, in part because of their heightened sensitivity to sugar content. One recent study in America found that 39% Gen Z view 'too much sugar' as a key concern when buying snacks – considerably more than older age groups.

But to dismiss Gen X and Boomers in innovation planning is to miss out on major growth opportunities, with snacks supporting digestive comfort, joint mobility and bone health considered to be prime areas for development.

Looming large on the horizon is the rapid rise of semaglutides (diet control medications) such as Ozempic that dramatically suppress appetites. It's not clear how this new dynamic will play out, but it's easy to see why snacking could be one of the hardest hit categories. Why snack when you're no longer hungry?

What we can be sure of, is that the global snacking category will continue to be one of the most responsive to consumers changing needs. There has never been a more exciting or critical time for manufacturers to innovate.

We hope that you find inspiration in this issue.  
We're ready to help you develop your ideas,  
including prototyping product experiences –  
and testing with your target audience quickly  
and efficiently.

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# The Evolution of Snacking: 10 DISRUPTION SPACES

Evidence from market data, consumer surveys, and industry trends clearly shows that the world is eating more snacks. Factors such as changing meal patterns, the influence of younger generations, health and wellness trends, and the convenience of snacking all contribute to this increase. We present 10 aspects of this mega category that showcase brands pushing boundaries and elevating experiences for consumers.



**SNACKCRATE** from Vietnam offers consumers a one-stop-shop for all the latest formats and flavors across the snacking category. Market analysts all agree that subscriptions boxes are set to grow at around 10% per annum well into the 2030s.



## **FUNCTIONALLY PREMIUM**

As people shop more intentionally, premium propositions will exhibit enhanced functionality.

## **ALPHA EVOLUTIONS**

Alphas are bringing a new set of need states to snacking, and innovation will need to match up.

## **SENSORY EXTREMISTS**

As the discovery era gathers pace, products pushing sensory boundaries will become more commonplace.

## **HEALTH HEROES**

As people's expectations rise, new high function snacks will gain momentum - transforming the category's remit.

## **NIGHTTIME NEWBIES**

With global lifestyles in perpetual shift mode, consumers will rethink eating habits after dark.

## **SOCIAL SENSATIONS**

Brands born or popularized on TikTok will continue to disrupt, offering high entertainment status snacks.

## **CRAZY COLLABS**

Manufacturers will escalate unexpected mash-ups to break the low attention economy.

## **MAINSTREAM WEIRD**

Big players will switch on unconventional and bizarre products to maintain the mainstream.

## **SAVORY TAKEOVERS**

Demand for snacks that downplay sweetness will increase as consumers satisfy cravings without all the sugar.

## **ASIA ADVANCES**

Snacking will cement its role as gateway to global tastes, with a new wave of Asian snacks landing in Western markets.



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# FUNCTIONALLY PREMIUM

It's no secret that consumers are prepared to pay more for products that elevate the sensory experience. However, as people shop more intentionally, disruptors are stepping up premium propositions built upon enhanced functionality.

Mainstream brands like KIND, RXBAR, and LÄRABAR have all recently capitalized on the demand for clean ingredients and functional benefits. For example, KIND's protein bars offer added protein while maintaining natural, recognizable ingredients.

Disruptors are adding further dynamism by catering to specific lifestyles, such as keto, paleo, or vegan diets, and commanding a premium by meeting niche consumer needs and presenting an upgrade to the everyday.

The added value of functional benefits helps position these products not only as snacks but as integral parts of a wellness routine, blending convenience with nutrition. Playful formats and interesting flavors are often used to underpin premium pricing, as these contenders demonstrate:



**MISFITS HEALTH** (UK) has introduced a line of high-protein, low-sugar snack bars targeting health-conscious consumers. These bars are vegan and gluten-free, with bold flavors like chocolate caramel or peanut butter. The emphasis on plant-based, nutritious ingredients without compromising on indulgence gives these snacks a premium edge.



**PIPCORN** (US) has reinvented the classic cheese ball by using heirloom corn, delivering a product that's both nostalgic and elevated. These heirloom snacks are non-GMO, gluten-free, and made with real cheddar, offering a healthier, more artisanal version of a traditional snack. Sustainable farming practices also enhance the premium feel.



Decadent but low calorie **DOUGHLICIOUS** (UK) has seen sales leap by 200% in 2023 and has refreshed its packaging in 2024. The brand is set for further momentum, having poached a key mover and shaker from U.S frozen brand My Mochi Ice Cream. It's founder, Kathryn Bricken says the brand is "the culmination of years of work building a cookie dough platform that is transforming snacking expectations and stretching the limits of what cookie dough can be."



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## ALPHA EVOLUTIONS

Generation Alpha – a cohort born from the early 2010s onward – has grown up in a world rich with technology and information, and their tastes and preferences are shaping the snack industry. Put simply, these consumers are more health conscious, socially and environmentally aware than any previous generation!

So-called iPad kids, Gen Alpha are open to moments of positivity that promote real-life connections, catering to their adventurous palates – the result of encouragement from Millennials parenting to be experimental. And as you might expect, young snackers are also heavily influenced by what they're seeing on social media, which is often the most exciting, sensorial and healthful offerings.

As Gen Alphas increase their hold on the direction of snacking, manufacturers must develop products that reflect the multicultural world that they live in. They must also cater for a generation that will increasingly see themselves as pioneers, with less regard for category conventions. And for a cohort that experienced the turmoil of a pandemic at a young age, there will be rising interest in products that support emotional and mental health needs. Here are some early examples:



**THREE ROBINS** (UK) Launched in 2022 this brand has expanded its range of plant-based drinks with Little Smoothies. Its mission is to offer products that are not only tasty and nutritious, but also lactose free. These fiber-rich smoothies are aimed at 3–12-year-olds and are designed to smuggle in vegetable goodness in an appealing way for tiny tastebuds.



**CLIF BAR** now offers energy bars designed specifically for kids. These bars come in kid-friendly flavors and are made with organic ingredients, appealing to health-conscious parents and their children. The brand calls out 'no artificial flavors, colors or preservatives' on pack, as well as assurances such as 'climate neutral', 'non-GMO' and '4g Whole Grains'.



**HARKEN SWEETS'** (US) These high-fibre candy bars are a hit with Gen Alpha, combining pleasure with purpose. The company's founder wants to help customers of all ages indulge, and not 'feel like crap' afterwards. Each bar offers '100% plant-based goodness' and uses date caramel for sweetness. Notably, each bar contains 'as much fibre as five cups of kale'. No contest.



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# SENSORY EXTREMISTS

It's an unstoppable trend that can't be ignored! Products pushing sensory boundaries with the promise of extra hot, extra spicy, extra this, extra that! Following a collective post-pandemic retreat to all things familiar and comforting, consumers are signaling that they're now ready to be challenged.

When it comes to extremes, snacks are leading the way, with a rush of bold, adventurous and memorable product experiences. Figures from Kellanova show that sales of more extreme variants are growing at a much faster rate than traditional lines.

Whilst some might dismiss all this sensory madness as a fad, we think it marks a new era of experimentation by consumers, and one that will shift the center of gravity for more traditional ranges.

In an episode of MMR's product-obsessed podcast [Impact Makers](#) called 'When Things Turn Sour', Dr Mary Carunchia at PepsiCo confirmed that 'the familiar is becoming extreme, and novel is becoming extremely extreme.' In her view, extreme consumer experiences are 'an unstoppable trend and a way for consumers to break out of their adulting mode.'

Add to this the emergence of semaglutide drugs such as Ozempic, which suppress desired portion sizes, there is emerging evidence that people will increasingly choose more intense sensory experiences to compensate. It's a fascinating development that means that this trend will accelerate.

So, from fiery heat to soaring sourness, here are some of the newly launched snacks designed to meet thrill seekers around the globe:



Known for its intense, rolled tortilla chips, [TAKIS](#) has become a catalyst for a category wide increase in spice levels. This disruptor's latest offer is Dragon Sweet Chili. Billed as a 'culturally-inspired flavor', the product experience starts off sweet but finishes with an intensely spicy kick. The sharp heat followed by sweet relief makes this product a hit among consumers looking for complex, layered tastes.



Taking inspiration from Sichuan cuisine, [LAY'S SICHUAN SPICY CHICKEN](#) flavor captures the mouth-numbing heat of Sichuan peppercorns combined with bold chicken seasoning. Launched in China, this chip mimics the spicy, savory flavors of a traditional Sichuan dish, offering a rich and intense snacking experience with a unique peppercorn zing.



# Growth Spaces

## SENSORY EXTREMISTS



The confectionery market has seen the emergence of fiery hot chocolate bars that cater to thrill-seeking consumers. Products like the Flamin' Anus (yes, really) and [RAGING REAPER](#) (US) are infusing chocolate with some of the world's hottest chili peppers. The Raging Reaper incorporates the Carolina Reaper pepper, known for its extreme heat, offering a daring experience for spice enthusiasts. The combination of sweet chocolate and searing heat provides a unique sensory adventure, appealing to those who enjoy pushing their taste buds to the limits.

Sour candies are experiencing a significant resurgence, fuelled by social media platforms like TikTok. The 'Toxic Waste challenge,' where participants attempt to hold a 'hazardously sour' candy in their mouth for a full minute, has amassed millions of views. In response, brands such as Candy Kittens launched [SHOX](#) sweets in March 2023. Marketing Director Ana Melvin attributes its success to consumers seeking sensory experiences that evoke emotional reactions, especially younger individuals who are more experimental with flavors and textures. Meanwhile, Rowntree's introduced [FIZZY CACTUZ](#) and [WARHEADS](#) released Sour Ooze Pops. Established sour brands are also cashing in, with [SOUR PATCH KIDS](#) standing as the only top 10 UK sugar confectionery brand to achieve volume growth.

Overall, the extreme craze reflects a shift toward more experimental eating habits, with consumers seeking out bold and intense flavors that provide a memorable experience.



**SOCIAL INSIGHT:** MMR's Social Listening Unit reports that online conversations about extreme snacking make up an impressive 17% of all conversations relating to snacking – with only 7% negative in tone.



# Big Players Battle for SNACK SUPREMACY

Fear of missing out is driving mainstream manufacturers to step up innovation, with M&A activity in the air as players seek a bigger share.

It's the M&A story of the year! **MARS** \$36bn bid to fuse its mostly sweet product portfolio with **KELLANOVA'S** mostly salty slate highlights that the snacking arena is not only dynamic, but also lucrative. The move reflects industry insiders' views that as consumers become more sugar aware, the savory sector will benefit.

Should a deal be done, the combined portfolio will be immense, bringing together brands such as M&M's, KIND and Hotel Chocolat with Pringles, Cheez-It and Pop Tarts. Analysts predict that the combined group will rank as the second biggest snack player behind PepsiCo. – unless something else happens!

And in a world where only the fittest survive, every major player is making sure that they are not left behind...

**CAMPBELL'S SNACKS** (formed 2017) has been working towards a more coherent portfolio of brands, disposing of Pop Secret to focus on iconic names such as Goldfish, Milano and Kettle. Recent innovations have included 'Air Fried' Kettle Chips, and Frank's 'Red Hot' Goldfish snacks – responding to health and taste trends respectively. The company has told investors that whilst it is confident in its ability to grow the business, the fight for share in salty snacks will intensify as rivals raise innovation output.





With analysts talking up the prospects for savory, **THE HERSHEY COMPANY** may have been feeling a little vulnerable, being mostly dependent upon sweet cravings. It's probably why the company has recently acquired a range of savory players including Dot's pretzels, Skinny Pop popcorn and Paqui tortilla chips. The company has declared its ambition to become a snacking powerhouse!

For **GENERAL MILLS**, CEO Jeff Harmening believes that growth is ultimately about investing in brands, particularly as consumers adjust to recent category inflation, driven by rising commodity costs. The company has been busy modernizing its portfolio, adding Larabar, :ratio KETO and Good Measure (blood sugar-friendly) to existing icons including Nature Valley, Chex Mix and Fiber One. To maintain share, General Mills will need to evolve its portfolio so that it keeps pace with people's more intentional (functional) behavior.

And what about those two giants of snacking: PepsiCo and Mondelez? The Mars/Kellanova tie up is likely to spark further innovations and acquisition activity from the leaders of the pack. **PEPSICO** will be wanting to move on from a slowdown in its US salty snacks business. The company is turning up the heat of its 'Extra' offering, by registering 'Exxtra Flamin' Hot' and 'Exxtreme Heat' – plus the 'Ignite' trademark.

Meanwhile, **MONDELEZ** recently asserted that affordability, portion control and variety were the main growth drivers for its snacking portfolio. Portion control remains central to the company's push towards 'mindful indulgence'.

And don't say we didn't warn you! The outspoken CEO of Tesla, Elon Musk has recently outlined plans to enter the candy market. Whether it's a flight of fancy or an elaborate hoax, we do know that Tesla has filed several patents including Supercharged Gummies ('a boost in every bite'), Mango Bolt (matching flavor with speed and power) and Dog Mode Chill (keeping pets calm in parked vehicles). If this comes to fruition, we can certainly expect a turbo boost to confectionery sales.

As we head into 2025, companies will focus on volume growth. To achieve this, brands must generate a more impulsive dynamic, with product experiences to match!





# Growth Spaces

## HEALTH HEROES

A new generation of snack brands is emerging as the Health Heroes of the food industry, focused on transforming snacking into a healthier experience. These brands are making a significant impact by reducing sugar, salt, and fat, offering personalized nutrition, and incorporating added health benefits into their products.

**SMARTSWEETS** (US) is a prime example, with low-sugar, high-fiber candy alternatives. Using natural sweeteners like stevia and allulose, they provide new-wave indulgence without compromising on taste. Similarly, **LILY'S SWEETS** (US) offers chocolate with no added sugar, substituting erythritol and tapping into the growing demand for less calorific treats.

On the savory side, **HIPPEAS** is making great strides with their organic chickpea puffs, which are low in fat and sodium while packed with plant-based protein and fiber. They appeal to consumers looking for crunchy, satisfying snacks that don't sacrifice flavor. Meanwhile, **POPCHIPS** offer low-fat, low-calorie alternatives to traditional chips by using a unique popping method instead of frying.

And **CHOMPS** (US) is earning its stripes as a snack disruptor with its range of grass-fed meat sticks (Beef, Turkey, Venison...) that are positioned as better for you: high protein, low calorie, zero sugar, **'WHOLE 30'** and keto compatible. In this highly competitive corner of snacking, Chomps sales have leaped over 200% in the past year, a figure that the company expects to exceed over the next 12 months!

Personalized nutrition is also building, with brands like **HABIT** (US) offering snacks tailored to individual health goals based on DNA and lifestyle factors. This data-driven approach provides personalized solutions for better health outcomes, from weight management to energy boosting.





By focusing on reducing problematic ingredients and adding functional benefits, these Health Heroes are not only reshaping the snack aisle but also promoting long-term health, proving that snacks can be both delicious and nutritious.



Founded by Oxford scientist turned entrepreneur Anthony, **URBAN LEGEND** (UK) is on a mission to take the junk out of junk food. The brand uses custom designed and patented air frying technology to create doughnuts with 30%-75% less sugar, fat and calories than their traditional counterparts. Its mission has already caught the attention of Mondelez, with its venture capital arm SnackFutures taking a minority stake in September 2024. The tie-up with Mondelez will help the brand accelerate on its journey to disrupt sweet treating.



Making functional yogurt more 'snackable' for adults, **THE COLLECTIVE** (UK) has developed a range of yogurt pouches, a format that's already a hit with Generation Alpha. And it's not the only manufacturer to go here. In the US, Chobani is promoting high-protein Greek yogurt pouches, and in Europe, Arla Foods has extended its Protein brand into this highly portable format. According to MINTEL, 39% of British consumers already consume yogurt as a snack, and this is likely to grow as eating habits continue to shift.

**JUNKLESS CHEWY GRANOLA BARS** (US) are seizing the moment by offering a clean-label alternative to traditional granola bars. Made with fewer, non-GMO ingredients and free from artificial additives, Junkless bars appeal to health-conscious consumers seeking snacks without preservatives or unnecessary fillers. This focus on transparency and simplicity aligns with the growing demand for healthier, natural options in the snack industry. What sets Junkless apart is their ability to maintain the familiar, indulgent taste of classic granola bars while eliminating 'the fake stuff' found in some competitors' products. This innovation has made them a popular choice for parents and adults alike, looking for better-for-you snack options. Junkless represents a broader shift in the food industry toward cleaner ingredients, showing how innovation can drive consumer interest by prioritizing both taste and health.







Like many disruptor brands, **NICKS** is the result of a real-life health diagnosis. In this case, founder Niclas 'Nick' Luthman was diagnosed as a pre-diabetic, and was forced to change his diet and lifestyle. He learned about nutrition and started following a strict low-carb, anti-inflammatory diet. Eventually, he was able to get his health under control, but the diet lacked excitement. He missed all the foods and snacks he loved. So, Nicks products – including protein bars, chocolate bars and oat bars do not contain added sugar, gluten, or palm oil, and claim to not compromise on taste.

**PLANT MADE** is run by a team of chefs, nutritionists and health-savvy foodies with a passion for creating delicious and healthy plant-based foods. They want to make it as easy as possible for people to eat more plants and lead healthier lives, with minimum effort and zero compromise. Curiously, the brand grows most of its fresh produce at its headquarters, with remaining supplies sourced from carefully chosen local suppliers to maximize quality and freshness and reduce food miles. The products span four health needs: Antioxidant, supporting immunity with ingredients such as turmeric, red pepper and orange. Energizer, benefiting heart health with beetroot, goji berry and quinoa. Vitality, rich in kale, broccoli and hemp seed. And a general Green Boost, with spirulina, spinach and ginger root.



**SOCIAL INSIGHT:** MMR's Social Listening Unit reports that online conversations around better-for-you snacking accounted for 15% of all snack conversations in the 12 months to October 2024, with 63% positive in tone.



# New Research

## GOING FOR THE GUT!

We pressure-tested three snack contenders hoping to persuade us to look after our gut!

Interest in gut health is rising as knowledge of the gut-brain axis, gut-skin axis and gut-hormone connection expands. With more people taking a more holistic approach to wellness, the only way is up for snacks promising benefits in this area – so long as they also meet universal requirements around taste, convenience and value.

For Growth Spaces Quarterly, we consulted over 900 U.K.-based shoppers to understand the appeal of three pioneer products: dūng (£2.49 per 50g bar), Bio & Me (£1.25 per 38g bar) and the gut stuff (£1.42 per 35g bar). For our test we selected only red berry variants.

Participants needed to be actively looking for products that support their gut health – which turned out to be 40% of the wider population. Of these, 31% already claimed to be buying snack bars to support their gut health.

Here are 5 things that we learned from our concept test:

1. For gut health, people are much more likely to navigate towards dairy drinks (65%) and yogurt (56%). To compete harder, snack bars must assert their portability, for travel for example. There could be merit in introducing yogurt coatings or fillings to align with preferences.
2. Opinions on our snack bar trio were overwhelmingly positive! On a 10-point scale, overall opinions for Bio & Me and the gut stuff tie at 8.3, with dūng a little behind at 7.6.
3. Unpriced Purchase intent for the bars is also strong, with 83% expressing a definite or probable intention to buy Bio & Me. 82% for The gut stuff and 73% for dūng. When prices were revealed, intent falls to around 60% of unpriced intent in all cases, which is normal.
4. Dung consistently underperforms vs. its competitors on perceived taste, texture, excitement and credibility. We hypothesize that the brand name is not to everyone's taste and could be creating downward pressure on sensory expectations across the board.
5. There are opportunities for all brands to dial up taste and texture characteristics to counter negative associations around fiber, digestion and gut health generally.

Without doubt, snack bars have a powerful role to play in the future of gut health, and we expect many more brands to follow these trailblazers!





## Growth Spaces

### NIGHTTIME NEWBIES

The rising trend of nighttime snacking presents a significant opportunity for brands to develop products that not only satisfy late-night cravings but also support wellness and sleep. As global lifestyles shift, partly due to factors like increased nighttime activities and changing work patterns, consumers are rethinking their eating habits after dark.

With 80% of adults globally claiming to experience some kind of sleep disruption, there's a growing demand for products that align with the values of sleep wellness, offering functional benefits alongside a little late-night indulgence.

The late-night snacking trend is also influenced by a burgeoning 'alt-nightlife,' where leisure and wellness activities merge after dark. This creates a unique space for brands to introduce innovative food and drink offerings that cater to nocturnal lifestyles, and that includes gamers!



Here's a selection of Nighttime Newbies that are high on function, low in sugar, and gunning for the nighttime economy:



As nocturnal lifestyles evolve, **TEN PM** (UK) is using natural ingredients and minerals such as passionflower, skullcap, chamomile, lavender and magnesium to create a new generation of nighttime snack bars. Calm Bars are designed to help consumers 'relax and unwind at the end of the day'.





Designed as a pre-bedtime snack, **NIGHTFOOD'S** (US) Sleep-Friendly Cookies have less fat, less sugar, fewer calories and more protein, prebiotic fiber, vitamin B6 and 500mg of inositol to support sleep. This disruptor is pioneering the category of sleep-friendly nighttime snacking and is actively building distribution with some of the largest hotel companies in the world, including hotel chains such as Courtyard by Marriott, Holiday Inn, Holiday Inn Express, Hyatt House, Fairfield Inn, Candlewood Suites, and others.



Snack disruptors are rethinking product format to bring the nutrients and ingredients of a meal into more convenient, snackable options. **UNDRESSED** (US) savory greens bar reimagines a salad bowl as an on-the-go snack option.



**SANS** (US) bars are designed to be a meal replacement – coming in at 390 calories, which may seem high for a bar but is comparable to a meal. Each bar also has 15 grams of protein and 7 grams of filling fiber. The company's motto is 'eat real food.' The name, SANS means 'without' and underlines the absence of added sugar, gluten, dairy, soy, and natural flavors. Most of the bars have just eight whole food ingredients including oats, flaxseed, and spinach powder.

**KONSCIOUS FOODS** (Korea) frozen-to-fresh onigiri includes Kale Gomae with flaxseeds and red quinoa, Korean BBQ Mushroom, Roasted Corn & Poblano or Japanese Vegetable Curry. The product is the perfect answer to the snackification of meals.





## Growth Spaces

# SOCIAL SENSATIONS

TikTok has become a hugely powerful platform for launching snack brands, with creators using their influence to build businesses that resonate with millions of consumers. From viral flavors to added benefits, TikTok has helped propel these brands to cult status. Here are five standout snack brands that were born on or popularized by TikTok social media personalities.



**TRUFU** (US) is a brand that exploded in popularity on TikTok with its frozen, chocolate-covered fruit snacks. Health-conscious TikTokers were drawn to its blend of indulgence and wellness, sharing their favorite TruFru products, like freeze-dried strawberries and raspberries covered in dark chocolate. Viral snack reviews and challenges have helped skyrocket TruFru's visibility, making it a go-to snack for those looking for a treat without the guilt. The TikTok community's enthusiasm turned this healthy snack into a fan favorite.



Maxx Chewning, a fitness influencer, turned his passion for candy into a thriving business with **SOUR STRIPS** (US), a brand known for its neon-colored, intensely sour candy strips. Chewning used TikTok to promote the product, showcasing its extreme sourness and fun packaging, which quickly caught the attention of candy lovers. Challenges featuring the candy went viral, propelling Sour Strips into mainstream snack culture. The brand's fun, bold image is a perfect fit for the energetic, fast-paced world of TikTok.



**QUEVOS** (US) started when TikTok creators and fans embraced these innovative egg white-based chips, positioning them as a healthier alternative to traditional chips. The brand was co-founded by Nick Hamburger and Zack Schreier, who aimed to create a high-protein, low-carb snack. Their idea gained significant traction on TikTok, with influencers and fitness enthusiasts praising Quevos for its nutritional profile and crunchy texture. With flavors like Sour Cream & Onion and Honey Mustard, Quevos has attracted health-conscious snackers looking for something new and satisfying.



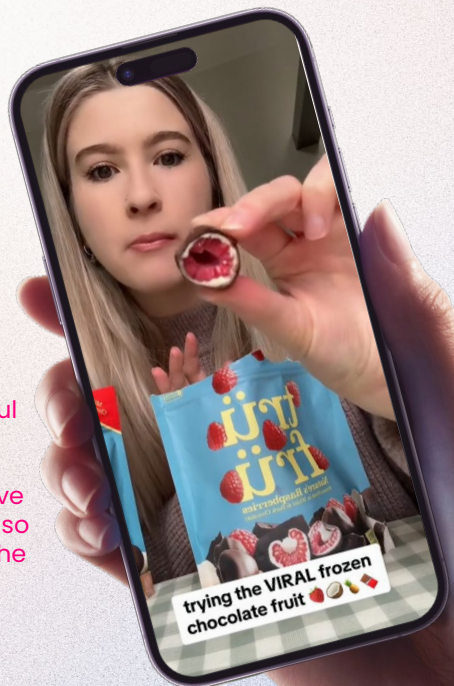


**EAT ME GUILT FREE** (US) bars gained viral attention on TikTok as influencers promoted them as a delicious, high-protein, low-carb alternative to traditional baked goods and snacks. Founded by Cristie Besu, a nurse and fitness enthusiast, the brand offers protein-packed brownies, cookies, and bars that cater to those seeking healthier indulgences. TikTok users created snack hauls and protein bar taste tests, often featuring Eat Me Guilt Free as a standout for flavor and nutrition, cementing its place in the health-snacking market.



**MID-DAY SQUARES** (US) is a brand that has embraced TikTok to share its journey, offering functional chocolate bars that combine plant-based protein with decadent flavors. Founded by Jake Karls, Lesley Karls, and Nick Saltarelli, the brand blends chocolate and protein in a unique snack that appeals to both fitness enthusiasts and chocolate lovers. TikTok users have shared their love for the product's taste and energy-boosting benefits - perfect for daytime 'slumps' - helping the brand grow rapidly through influencer partnerships and viral content.

These social snack brands demonstrate the power of TikTok in transforming social media influence into successful businesses. By engaging with their audiences and creating viral content, these brands have not only gained visibility but also loyal fanbases, showing that the right combination of creativity and community can propel a snack brand to new heights.





# Why Product Experience MATTERS MORE

Traditional advertising methods, including the once reliable TV spot or print ad are losing their grip on consumers attention. As a result, the snacking sector has begun to shift its focus, investing more heavily in product experience as the primary driver of consumer engagement.

In the modern era, it's not enough for snack brands to simply satisfy people's quests for a tasty treat; they need to create an experience that captivates and excites. Snacks are no longer just fuel — they're becoming part of an emotional, sensory, and social experience that consumers are eager to engage with.

The rise of TikTok, YouTube, and Instagram has further accelerated this dynamic, as influencers and everyday consumers alike create viral content centered on bold, extreme, and unusual product experiences. From the fiery heat of **SAMYANG'S BULDAK NOODLES** (below) to the jaw-puckering sourness of Toxic Waste candy, snacking has evolved into a performance, one that is shared and amplified on social media for millions to witness.





## Extreme Entertainment

One of the clearest examples of this shift is the growing popularity of extreme flavors and textures in snacks. Snacks that push the limits — whether they're unbearably spicy, intensely sour, or boast unexpected textures — are designed to create a visceral reaction. These extreme sensory experiences not only grab consumers' attention but also give them a reason to share their reactions online, fueling organic engagement in a way that traditional ads simply can't.

Brands like PepsiCo have recognized this trend and are actively developing products that deliver more intense, immersive experiences. The likely return of Doritos Roulette, where one chip in a handful is significantly hotter than the rest, is a prime example of how established brands are tapping into the demand for daring snacking experiences. These products not only draw in thrill-seeking consumers but also provide the perfect fodder for viral social media challenges, giving brands massive exposure without a single ad.



## Creating Connections

The shift towards product experience isn't just about capturing attention in the short term; it's also about building deeper connections with consumers. As people grow tired of superficial marketing tactics, they're increasingly seeking out brands that offer genuine value, excitement, and novelty. In this new landscape, product innovation becomes a critical component of brand loyalty.

# 56%

**of consumers are  
willing to pay more for  
snacks that provide a  
novel experience.**

Source: Nielsen IQ, 2023



This points to rising expectations among shoppers for more than just a functional snack — they want a product that offers a multisensory experience, something they can talk about, share with friends, and savor beyond the act of eating.



This trend has created new opportunities for both established and emerging brands. Smaller snack brands have a chance to break through the clutter by offering unique, memorable products that capture the imagination of consumers. For example, US disruptor **DEUX** makes 'donut holes' that hit all the right notes, but with much less sugar and functional ingredients designed to boost energy.



## Multisensory Engagement

While bold flavors grab headlines, the evolution of snacking experiences goes beyond just taste. Brands are increasingly focusing on how texture, packaging, and even the eating process itself can enhance consumers' overall experience. Sensory cues like crunch, aroma, and visual appeal are being engineered to deliver a more immersive and engaging snacking moment.

Take **WOTSITS**, for example. This classic snack brand has embraced the relationship between texture and flavor, offering a product that connects the crunchiness of the snack with a prolonged flavor release. Studies have shown that consumers often associate crunch with a more intense flavor experience, adding another layer of enjoyment to the snack.

Moreover, this focus on multisensory experiences extends to the way products are packaged and presented. Interactive packaging, such as QR codes that reveal pairing suggestions or personalized content, invites consumers to engage with the product in a more dynamic way. Some brands are even incorporating gamification into their product lines, challenging consumers to participate in flavor tests or heat challenges, further enhancing the overall experience.





## Product Matters

As traditional advertising continues to lose its edge, the role of the product will become more critical. For the snacking sector, this means that product experience — in all its sensory, emotional, and social dimensions — will play an increasingly central role in how brands engage with consumers. This focus on experience is not a fleeting trend; it's a fundamental shift in how brands will need to operate in an attention-poor, experience-rich market.

In the coming years, we can expect more snack brands to push the boundaries of flavor, texture, and packaging as they look for new ways to stand out. From ultra-spicy snacks to highly interactive eating experiences, the snacking sector is poised to become a playground for bold, innovative, and immersive product experiences that engage consumers on a deeper, more meaningful level.

Brands that can successfully pivot from traditional advertising to experiential marketing will not only capture the attention of today's distracted consumer but will also build lasting loyalty in an increasingly competitive market. And as the snacking landscape evolves, it's clear that the future will belong to those who can transform their products into unforgettable experiences.





## Growth Spaces

# MAINSTREAM WEIRD

The snack industry is experiencing an influx of unconventional and bizarre products. From pickle-flavored candy canes to insect-infused protein bars, these weird snacks are not just novelties, but strategic offerings designed to capture consumer attention in a crowded marketplace – and appeal to a new generation of consumers who crave unique and adventurous eating experiences.

Today's shoppers, especially Millennials and Gen Z, are more willing than ever to step outside traditional taste profiles and try something entirely new. They seek products that offer not just sustenance but also an experience. In other words, snacks that challenge palates and provide stories worth sharing.

Social media platforms, particularly TikTok, have become powerful catalysts for this trend. The app's algorithm is all over engaging, surprising content, making it an ideal stage for weird snacks to shine.

Here are some product examples to show how weirdness is working its way into mainstream spaces...



Proof, if proof were needed, that mainstream brands can be weird, **DORITOS** (Australia) introduced a coffee variety. This unique flavor was created to help Aussies get over the '3 PM slump' – the time coffee shops in the country typically close their doors. TikTok [@angeeats](#) got some in and said "This is interesting. Kind of like a cinnamon-y, coffee taste. Salty. This is good!" So now you know!



With sales of gum falling in many markets, Hershey owned **ICEBREAKERS** (US) are turning to unique flavors, ingredients and formats to boost consumption. The brand is targeting people 'whose gum and refreshment routine has just gotten boring.' Hershey describes Flavor Shifters as a 'big bet' and thinks this innovation 'pushes the boundaries' by extending the category beyond the single-flavor experience for which it is known.



Japan is famous for its adventurous approach to candy flavors. And the fact that **KITKAT** is taking on Wasabi, is further evidence of Mainstream Weird. One reviewer wrote: 'Initially, the creamy white chocolate flavor dominates, followed by a mild, spicy wasabi aftertaste. Surprisingly addictive for those who enjoy a bit of heat. This is very close to one of my favorite weird snacks!'



# Growth Spaces

## SAVOURY TAKEOVERS

Demand for snacks that rely less on sweetness is increasing. It's all part of a wider trend that's been labeled as 'the savory movement.'

According to Kerry, more than seven in ten global respondents are reducing their sugar consumption to live a healthier life. In the US, 84% of consumers claim that they are avoiding or decreasing consumption of sugar to manage blood glucose levels.

For manufacturers, heightened interest in savory options presents exciting opportunities. Experimental sweet and savory flavor fusions can add new excitement across snacking occasions, as these disruptors are already proving...



Vietnamese craft chocolate brand **AN NÔM** plays with savory flavours and stimulating textures in its **PORK FLOSS** bars, taking full advantage of the sweet and salty traditional snack and rice topper into its bars. The brand draws from rising Southeast Asian flavors and textures to add dynamism to its offer.



**PROPER** (UK) has just expanded its range of savory popcorn flavours, adding Tangy Chilli, Smoky & Sweet Paprika and Cracked Black Pepper & Salt. Low in fat, salt and sugar, they are vegan and gluten-free. 'In the US, nearly half of sales come from savory, because people have an abundance of savory flavors to enjoy — an opportunity that is only serviced by salted popcorn in the UK,' claims the brand.



Even donuts are getting in on the savory act. **CROSSTOWN** (UK) has perfected a Double Cheese & Sundried Tomato Donut. Its unique character has already captured attention, and it's achieved viral savory snack status. Meanwhile, the **DOCE DONUT CO** (US) has developed the Maple Bacon Donut, merging sweet maple syrup with savory, crispy bacon, offering a perfect balance of rich sweetness and smoky saltiness. It has achieved fame both for its flavor and its Instagram-worthy presentation.



# Growth Spaces

## CRAZY COLLABS

The snack industry is no stranger to innovation and surprise. Brands continually push the boundaries to stay relevant, often collaborating in unexpected ways. Here are five wild snack mash-ups that have turned heads and tantalized taste buds.



In a surprising twist, Lay's introduced chips flavored like other popular snacks from the PepsiCo family. The standout was Lay's chips seasoned with Doritos' iconic Cool Ranch flavor. This cross-brand experiment allowed snack lovers to experience the familiar taste of Doritos on the classic Lay's potato chip, creating a unique and intriguing experience.



Cheetos took their signature cheesy flavor to a new level by launching a line of macaroni and cheese products. Available in Bold & Cheesy, Flamin' Hot, and Cheesy Jalapeño flavors, this collaboration brought the crunch and spice of Cheetos to a beloved comfort food. The result was a vibrant, flavor-packed dish that appealed to both kids and adults looking for a nostalgic twist.



In a limited-time offering, Oreo and Ritz combined forces to create a snack that balanced sweet and savory. One side featured a classic Oreo cookie with creme, while the other was a Ritz cracker with peanut butter filling. Merged, they formed a sandwich cookie that delivered an unexpected yet harmonious blend of flavors and textures.

Pringles partnered with Nissin to bring the comforting taste of Top Ramen Chicken flavor to their stackable chips. This collaboration captured the essence of the popular instant noodle soup in a crispy chip form.

KFC teamed up with Lay's to create potato chips that taste like the fast-food chain's famous fried chicken. Available in select markets, these chips aimed to replicate the secret blend of herbs and spices that make KFC's chicken so distinctive.



Whether it's merging sweet and savory or transforming beloved meals into snack forms, these partnerships keep the sector fresh and exciting. We can look forward to many more surprising collaborations, for sure.



# THE RISE OF TRADITIONAL CHINESE MEDICINE

## in modern snack products

The resurgence of Traditional Chinese Medicine (TCM) in contemporary food and beverage products has become a remarkable phenomenon in China's consumer market. Far from being a fleeting novelty, TCM ingredients are steadily permeating almost every category of consumables, including snacks, drinks, and even baked goods. It's a trend that reflects a confluence of cultural pride, nostalgia, and a modern approach to health and well-being.





## National Pride

One of the driving forces behind the TCM renaissance is a renewed sense of national pride. Chinese consumers are increasingly valuing products that are intrinsically linked to their culture and history. This sentiment has boosted faith and curiosity in domestically produced goods, encouraging brands to delve into traditional practices for inspiration.

Local pride also plays a significant role. There's a burgeoning interest in re-discovering the charm of indigenous ingredients like **MAOMING HUAJUZHONG** (茂名化橘红), **CHENPI** (陈皮), and **JINYINHUA** (金银花). Social media platforms are abuzz with content broadcasting these regional treasures, further fueling consumer enthusiasm.

## Nostalgia and Novelty

The TCM trend thrives on a delightful mix of nostalgia and novelty. Products are designed to be fun and slightly unconventional, sparking curiosity about places and cultures that were previously overlooked or even disliked. For instance, serving coffee or milk tea in traditional TCM clay pots has become an Instagram-worthy experience, merging the old with the new in a visually appealing way.

Nostalgia taps into childhood memories of visiting TCM pharmacies or taking herbal remedies like **CHUANBEI PIPA GAO** (川贝枇杷膏), **SHUANGHUANGLIAN** (双黄连), and **BANLANGEN** (板蓝根) that mothers often administered for minor ailments. This emotional connection adds a layer of comfort and familiarity to the products, enhancing their appeal.





## Pursuit of Health

In an age where the term "cyberpunk well-being" (朋克养生) is gaining traction, young consumers are paradoxically seeking health benefits while maintaining less-than-ideal lifestyle habits. This approach involves trying every available method to stay healthy, except perhaps the most straightforward ones like proper diet and sleep.

The current TCM trend aligns with this mindset. Many consumers don't genuinely expect that occasionally consuming products infused with TCM ingredients will solve their health problems. Instead, it's a light-hearted, self-mocking way to feel proactive about their well-being, and a nod to their parents with a "hey mom, I'm taking care of myself" attitude.

## Balancing Tradition with Taste

When it comes to incorporating TCM into snacks, sensory features are crucial. Chinese consumers generally have a higher tolerance for traditional off-flavors and expect certain sour, bitter, or spicy notes in products containing herbal ingredients. Achieving the right balance of these flavors can evoke a sense of well-being and authenticity.

Different product categories offer varying advantages. For example, ice cream can effectively neutralize medicinal tastes due to its milk content, high sugar levels, and low temperature — all of which can suppress strong flavors. Conversely, categories like tea drinks and coffee lack these natural masking agents and may even amplify medicinal notes, requiring careful attention to ingredient amounts to maintain palatability.

## Nourishment Over Cure

Products incorporating TCM should focus more on delivering emotional benefits rather than making bold health claims. The goal is to promote a sense of nourishment (养生) rather than promising cures (治疗). Over-promising can lead to consumer distrust, especially if the product strays into the territory of health supplements or medicines without proper substantiation.

### EMOTIONAL BENEFITS INCLUDE:

#### A SENSE OF NOURISHING

Positioning the product as the most rational and suitable choice for one's body within its category.

#### ENHANCING PRODUCT EFFICACY

Complementing the product's inherent qualities; for instance, a mood-lifting ice cream rather than contradicting them, such as a sleep-inducing coffee.



## TRANSPARENCY IN INGREDIENTS

Providing clear information about the ingredients and their purposes allows consumers to learn and feel a sense of achievement in making informed choices.

## FUNCTIONAL BENEFITS VARY BY CATEGORY:

### EXPECTED EFFECTS

In pharmaceuticals and certain beverages, consumers might anticipate tangible benefits.

### JUST FOR FUN

In snacks and baked goods, the inclusion of TCM ingredients often serves more as a novelty, adding an interesting twist rather than delivering health effects.

The integration of Traditional Chinese Medicine into modern food and snack products is more than a passing fad—it's a multifaceted trend rooted in cultural identity, nostalgia, and a contemporary approach to health. By thoughtfully balancing sensory appeal and focusing on emotional nourishment, brands can successfully weave TCM elements into their offerings. This not only enriches the consumer experience but also bridges the gap between tradition and modernity, appealing to a generation that values both heritage and innovation.



In Shanghai, a new ice cream shop has recently made headlines with its range of ice creams containing traditional Chinese medicine (TCM). With a total of 16 flavors, including mint and watermelon frost, wild chrysanthemum and pistachio, smoked plum, bamboo and jasmine, hawthorn and bergamot, and loquat syrup, these snack options add intention to indulgence.



# Growth Spaces

## ASIA ADVANCES

Snacks originating from Asia are making significant inroads into international markets, captivating consumers with unique flavors and textures. This surge is driven by increased globalization, adventurous eating habits, and the influence of social media showcasing diverse culinary delights.

One prominent example that leads the way is **POCKY** from Japan. These slender biscuit sticks coated with chocolate or various flavored creams like matcha green tea, strawberry, and cookies and cream have become a global phenomenon. Another example is Boba or Bubble Tea from Taiwan. Originally a beverage, its key ingredient — tapioca pearls — has crossed over into snack territory with innovations like bubble tea-flavored ice cream and candies. And let's not forget the recent mochi texture craze that has powered brands like **LITTLE MOONS** in the west, all began in Asia.

As consumers continue to seek novel and exotic tastes, the influence of Asian snacks on the global food industry is set to expand even further. Here are three that caught our eye:



**MEIJI** expanded its Hello Panda line with a matcha green tea flavor, featuring panda-shaped biscuits filled with creamy matcha filling. Matcha has grown in popularity worldwide due to its unique taste and health benefits. Combining it with a fun, playful snack introduces Western consumers to traditional Japanese flavors in an accessible format.



**SLURRP FARM** has expanded its snack portfolio with millet-based options like puffs and cookies in child-friendly flavors such as tangy tomato and chocolate brownie. The brand promotes the use of ancient grains like millets, which are nutrient-rich and sustainable. By creating snacks that appeal to children, they address the need for healthier options in the kids' snack segment.



This start-up is hoping to convince consumers that fox nuts are the new go to snack. Fox nuts are high in protein, fiber and minerals and have a lower glycaemic index (GI). **STRICTLY NUTS** says that 'usually people munch popcorn while watching movies, but fox nuts are much healthier, and kids love them.' The brand says that fox nuts are a staple in India and want to raise awareness elsewhere.



# LET'S DISRUPT TOGETHER!

In the evolving CPG industry, digital transformation is crucial. MMR's **Product Hub**, an automated product testing platform, addresses industry needs by reducing costs, streamlining workflows, and enabling rapid concept exploration. With easy setup, simplified sourcing, and rich data insights, Product Hub helps you quickly refine concepts and ensure successful product launches.

## PRODUCT HUB ADVANTAGE:

We listened. You wanted a lower-cost product testing tool, a smoother set-up process, and faster turnaround times.

### REDUCED COSTS

Benefit from streamlined workflows and automation that translate into significant cost savings.

### EFFORTLESS SETUP

Get your projects up and running in no time, freeing up valuable resources.

### SOURCING SIMPLIFIED

Find competitive products for your test with our user-friendly interface.

### DATA-DRIVEN DECISIONS

Leverage rich normative data to make informed strategic choices.

### VISUAL STORYTELLING

Generate compelling visualizations that present insights with clarity and impact.





# SNACK BAR CASE STUDY

**JADE & JOY** make collagen snack bars that respond to the inner beauty trend, and they wanted to know how well their product experience matched up to people's expectations – and their competitors!

Data was required to help the company build a compelling retail strategy, and after assessing all their options, Jade & Joy chose to use Product Hub to execute a concept and in-home product test. They were also swayed by Product Hub's Sensory Bolt On, which promises to illuminate end-user experiences.

Product Hub was able to get things moving effortlessly, including all sourcing of competitor products. In no time, results were coming in and indicating product superiority! Moreover, insight from the Sensory Bolt On was providing evidence that Jade & Joy's product had avoided typical 'off notes' that were present in other functional bars. Knowing this helped Jade & Joy build a case for superior repeat rates.

Jade & Joy is now building its distribution base with confidence, and we wish them every success.







# GROWTH SPACES

QUARTERLY

Let's work together to  
Elevate snacking  
experiences!

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