



Asia Pacific

# The OMMMM of MMMMM Snacking Redefined

Issue 17 | August 2022



Discover how consumers lifestyle and preferences are influencing the *snacking* industry and what business are doing in response to these behaviours. Learn how to complement sweetness with other flavours when formulating snacks in our  trend – Plus Sweet.



## Snacking redefined...

From chips to granola bars and even salads, snacking today has evolved into many different shapes and formats that almost anything could be defined as a snack.

In this issue, we will explore the blurring definition of snacks and how its role has progressed over the years; from curbing cravings to replacing meals wholly and even boosting our overall mood. From better-for-you claims to scaling down to smaller bites, deep dive further into the realm of permissible indulgence where consumers constantly push the boundaries of healthy snacking.

Keep a look out on what's happening in the current snacking space as we highlight how to find the sweet spot by complementing sweetness with other flavours in Flavourcale.

Now, let's chew on the OMMMMM of MMMMM of snacking!





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McCormick® Flavour Forecast® 22<sup>nd</sup> Edition – Plus Sweet





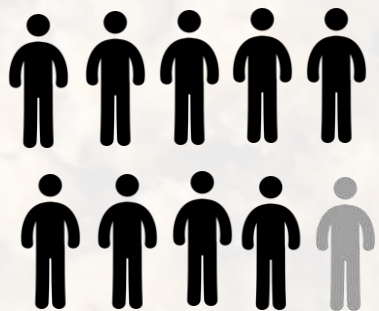
# I. Eatsighting

**Curb your cravings**

Consumer snacking trends observed in *Asia Pacific*

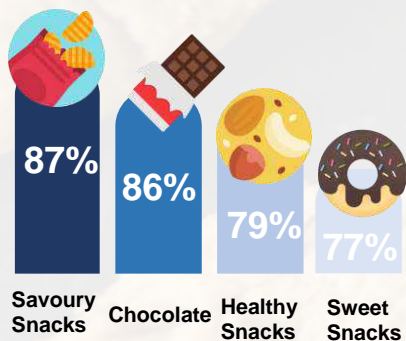


# What's happening in the *Asia Pacific* snacking industry



9 in 10

Australian adults eat packaged snacks in an average week. The most popular category is **savoury snacks** (66%), followed by healthy snacks (55%).



Across different snack categories, Indonesian consumers snack on **savoury snacks (87%)** the most.



This study was carried out by McCormick Flavour Solutions (APZ) in the form of an online questionnaire in March 2022. (n= 405; 43% Male, 57% Female)

Source: Roy Morgon Research

## CONSUMER TRENDS IN ASIA PACIFIC



Snacking Everywhere, Everything, All At Once



The Flavour We Love



Snack It Our Way

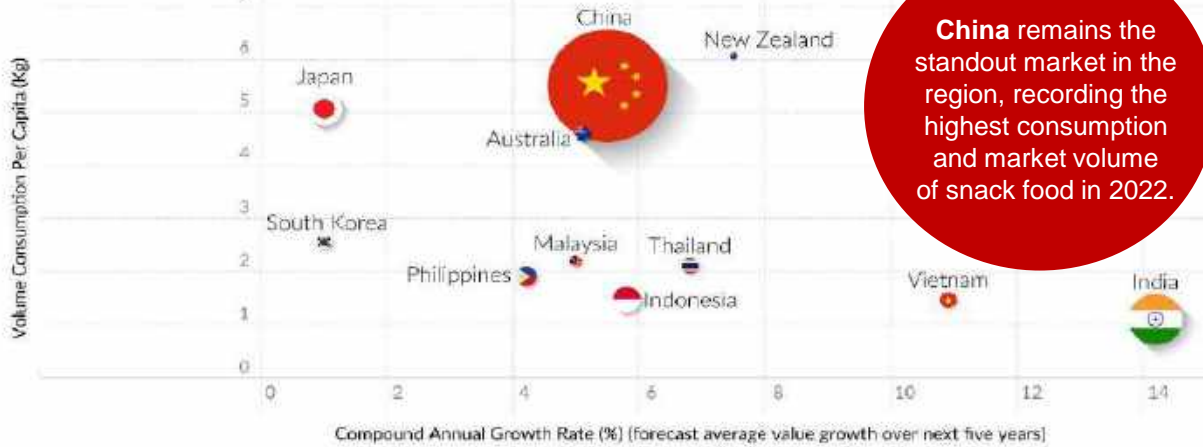


Country Spotlight:  
Indonesians Love For Snacks

# CONSUMER TRENDS IN ASIA PACIFIC

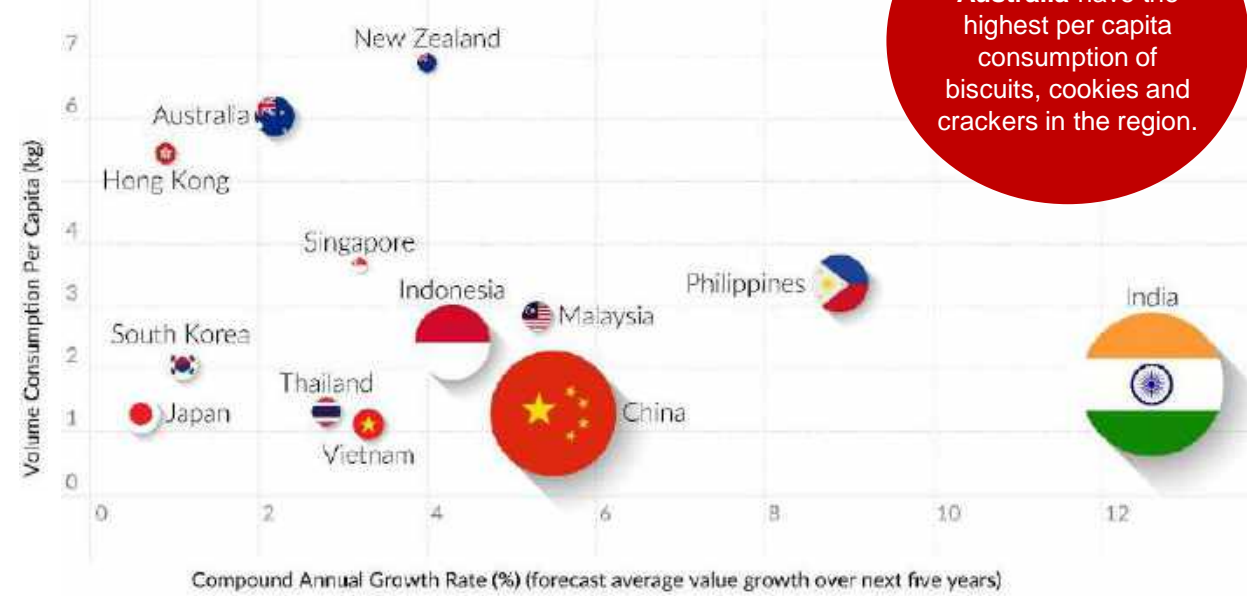
## Snacking Everything, Everywhere, All At Once

APAC retail market overview: **snack food**, 2022



**China** remains the standout market in the region, recording the highest consumption and market volume of snack food in 2022.

APAC retail market overview: **biscuits, cookies and crackers**, 2022



**New Zealand and Australia** have the highest per capita consumption of biscuits, cookies and crackers in the region.

As for the **cereals** category, consumers across Asia have different demands and expectations of cereal snacks.

### Protein



**Blife MuscleBlaze MB Protein Granola**  
India

Features the richness of high-fibre oats and the goodness of almonds and cranberries to keep hunger at bay. It offers 16g of protein per 50g serving.

### Energy



**XS Honey Oatmeal Energy Cereal**  
South Korea

Claims to provide fresh energy and contains vitamins A, B1, B2, B6, C, D and E as well as niacin, folic acid, iron, zinc and calcium. It comprises crispy loop shaped oat and honey cereals.

### Sustainability



**We, the many Rise Beetroot Granola**  
Australia

The manufacturer claims to make carbon neutral products and to invest 50% of its profits into projects that reduce carbon in the atmosphere.

Source: Mintel, Times of India



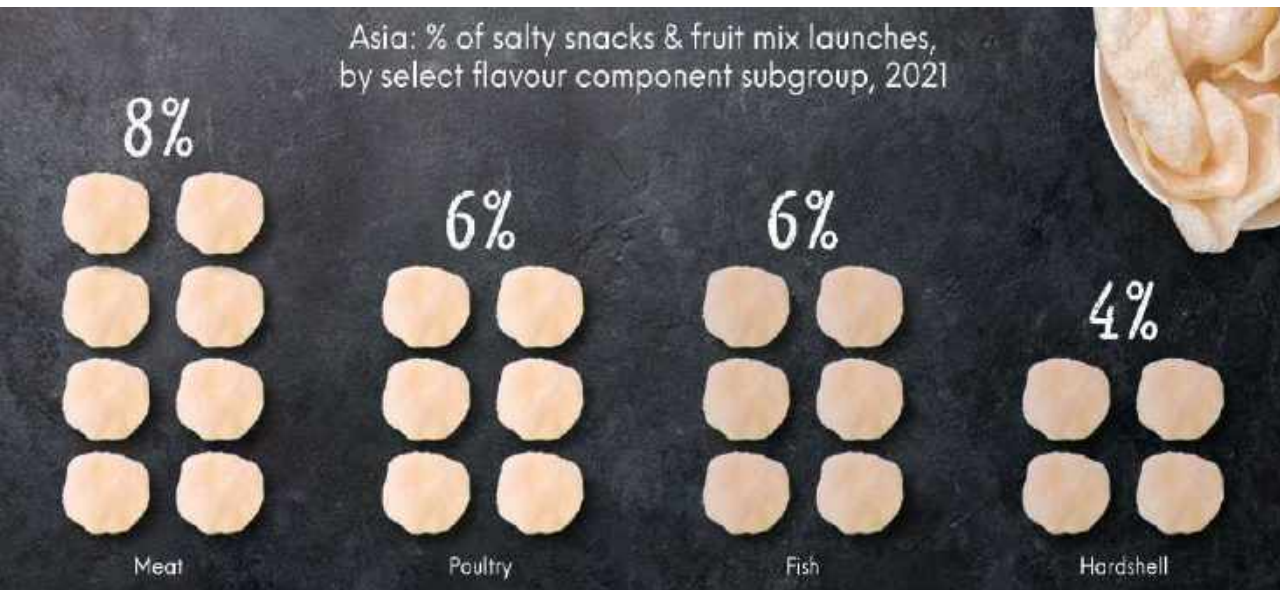
## CONSUMER TRENDS IN ASIA PACIFIC

# The Flavour We Love

### Meat Galore

Salty snacks and fruit mixes with meat-based flavours remain a niche proposition. Meat flavours represent the largest share of innovations, while poultry and fish flavours are less developed. Brands can look to the popularity of meat snacks for flavour inspiration and consider innovating meat-inspired flavours that appeal to consumers who may not want a meat snack, but are seeking for meat-like flavour.

-Mintel 2022



### Kabklong Kabklam Hadyai Seasoned Crispy Fried Chicken Skin

Thailand

Deep-fried chicken skin coated with Hadyai chicken seasoning and salt. The halal certified product can be eaten as a snack, with drink and anywhere.

**44%** of adults in China have not had chips made from chicken and are interested in trying them

For Australia & New Zealand, **limited edition and novel flavours** in the salty snacks category create excitement among consumers and keep them engaged.



### Twisties Meatlovers Pizza

Australia

A limited-edition product combining the classic crunch of Twisties with the flavours of a meatlovers pizza.



### Red Rock Deli

Australia

Red Rock Deli Chef Series Braised Beef Brisket with Caramelised Onion Flavoured Potato Chips is part of a range of chips made in collaboration with chef Colin Fassnidge to reimagine restaurant flavours, using the finest quality ingredients.



# CONSUMER TRENDS IN ASIA PACIFIC

## Snack It Our Way

### Generational Preferences

Across different age groups, there are noticeable snacking preferences and motivations. According to Mondelez state of snacking report (2021), it can be observed that different cohorts demonstrate different motivators for snacking.

**82%** of global consumers attest that “snacks have served different purposes for me at different phases of my life”

#### “Snack to relieve boredom”

Gen Z (1997 – 2012) **79%**

Total **69%**

#### “Snack to meet nutritional needs”

Millennials (1981 – 1996) **85%**

Total **78%**

#### “Snack for comfort”

Gen X (1965 – 1980) **85%**

Total **82%**



### Playful textures



### Mengniu Chunzhen (纯甄) Yummy Yogurt (馋酸奶) China

Targeting young consumers, Chunzhen makes use of ingredients like proteins and popping candies that contribute to health and playfulness. The Yummy Yogurt contains 31% less sugar and 35% more protein than the minimum amount required by national standards.

### Responsible snacking and lifestyle



### Tudòs Potato Chips Malaysia

The potato chips are handcrafted in small batches and come in 4 flavours such as Naughty Truffle and Flirty Mala. Tudòs advocates for open conversations around safe sex and hopes the brand can bring awareness to the importance of developing healthy attitudes towards sex and encourage responsible sexual behaviours.

### Enrich your body



### Befco Tanita Shokudo Calcium Senbei Japan

Japanese snack brand Befco has addressed consumer concern about calcium deficiency by launching rice crackers fortified with dried bonito and lactic acid bacteria for added bone health benefits. Calcium fortification in salty snacks can prove to be an effective way of contributing sufficient calcium requirements for older consumers' daily diets.

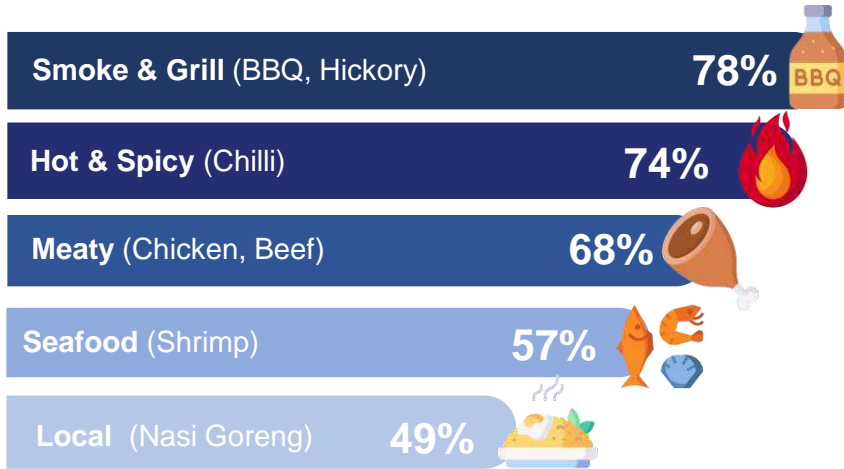
## Country Spotlight: Indonesians Love For Snacks



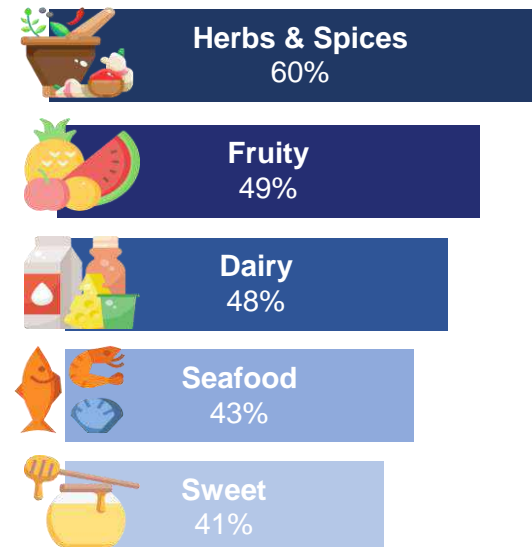
Indonesians enjoy snacking. With the easing of COVID-19 restrictions, the performance of savoury snack is set to grow from expansion of snack occasions. As Indonesians resume pre-pandemic activities, more opportunities for impulse purchases and on-the-go consumption should boost sales of savoury snack.

*McCormick Flavour Solutions conducted an online survey\* in March 2022 to understand snacking habits and perceptions of Indonesians (n= 405; 43% Male, 57% Female).*

### Top 5 Flavours Preferred In Savoury Snacks



### Top 5 Flavours That Are Considered Healthy



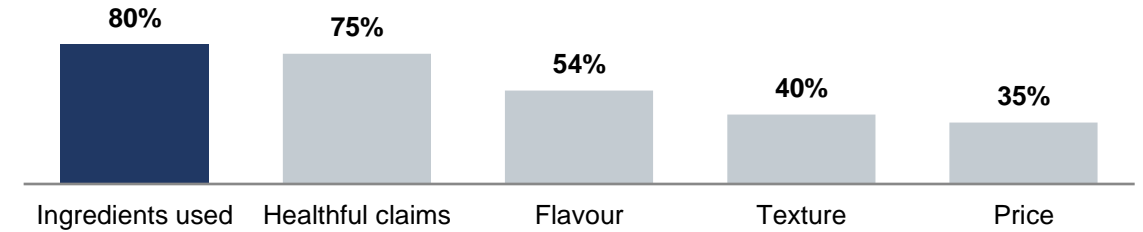
### Top 5 Herbs & Spices Perceived As Healthy



# 95%

of Indonesian consumers wish there were healthier savoury snack options in the market and 89% are willing to pay more for it

The factors that determine whether a snack is healthy depends on the **Ingredients used**, followed by **Healthful claims** (such as high protein, low in sodium) & **Flavour**.





A collection of glass jars filled with various healthy snacks. In the foreground, there are jars containing white rice, granola, and a mix of rice, granola, and vegetables. In the background, there are jars containing fruit (blueberries, grapes, raspberries) and granola, and another jar containing chia seed pudding with fruit on top. The jars are arranged on a light-colored surface against a white background.

## II. The Foodture

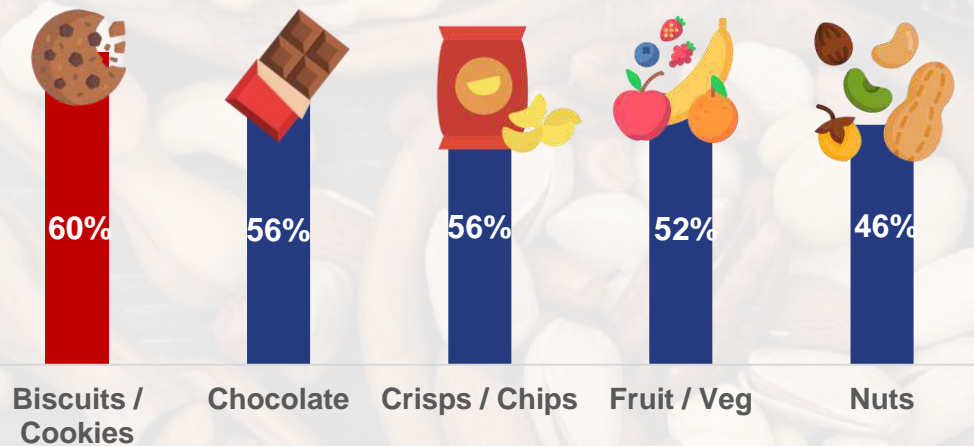
### It's crunch time

Discover the emerging consumers trends that are shaping the *snacking* scene

# Top global consumers trends influencing the *snacking* industry

While snacking is a common lifestyle practice in the Asia Pacific region, consumer attitudes in snacks have experienced a seismic change in recent years. Due to the rapid expansion of online and offline shopping, snacking frequency has increased along with rising household disposable incomes and accessibility to goods.

Which of the following do you typically snack on?



Source: Asia Pacific Food Industry, GlobalData

## BROADENING ROLE OF SNACKS



Meal Replacements



Mood Enhancers



Social Bonding

## PERMISSIBLE INDULGENCE IN SNACKING



Evolving Base Formats



Functional For Me



Shareable Small Bites



## BROADENING ROLE OF SNACKS

# Snacks as Meal Replacements



### *“Snackification”*

#### **A trend which consumers are replacing meals with snacks**

As time is becoming an increasingly scarce resource, consumers are turning to pre-prepared meal solutions or quick fix to satisfy their hunger. Eating patterns are evolving as consumers seek convenience and the concept of three meals a day at set intervals is dwindling.

- Euromonitor 2020



#### **TH True Milk, Light Meal Vietnam**

Consumers in Vietnam were seeking healthier beverages and product with added values during the pandemic. This Light Meal Milk is the first and only UHT snack drink in Vietnam which combines milk with cereal grains and nut paste.



#### **Pro Bar, Meal On-The-Go USA**

A protein bar labelled as “Meal on-the-go”. The Peanut Butter Chocolate Chip gets its protein content from peanuts, sunflower seeds, brown rice, flax seeds and sesame seeds and its fiber from oats and dates.

64% of global consumers prefer to eat many small meals in a day, opposed to few large ones



#### **Wu Gu Shi Dai, Yololand China**

Yololand Coconut and Chickpea Flavoured Drink. This product comprises a drinkable cereal for on-the-go consumption, aiming to expand consumption occasions.

## BROADENING ROLE OF SNACKS

# Snacks as Mood Enhancers

### Feed The Mind

With rising anxiety due to the pandemic and uncertain economy, snacks can help consumers to relieve stress and improve their mood.



# 46%

of Indian consumers snack to improve their moods while 41% of them do it to de-stress



# 51%

of UK consumers agree that eating crisps / nuts / savoury snacks is a good low-cost way to boost one's mood

### Mood-boosting indulgence

#### South-Eastern Grocers Prestige USA



The kosher product is described as an 'instant mood fix' and claimed to be made with only the finest selected ingredients, such as real milk and cream. It contains no artificial flavours or high fructose corn syrup.

### Cure sleeplessness

#### Kellogg's Mexico



Kellogg's Toasted Cereals with Almonds contains a mix of vitamins and minerals that nourish during sleep, thus making it an excellent option for a light dinner and helping to support a more tranquil sleep, promoting the "Eat Light, Sleep Better" campaign.

### Psychobiotics: an effective ingredient to reduce stress via the gut-brain axis

#### Asahi Japan



This FFC-certified product is formulated with Lactobacillus gasseri cultures, said to relieve stress, improve sleep quality and support the digestive system.



# BROADENING ROLE OF SNACKS

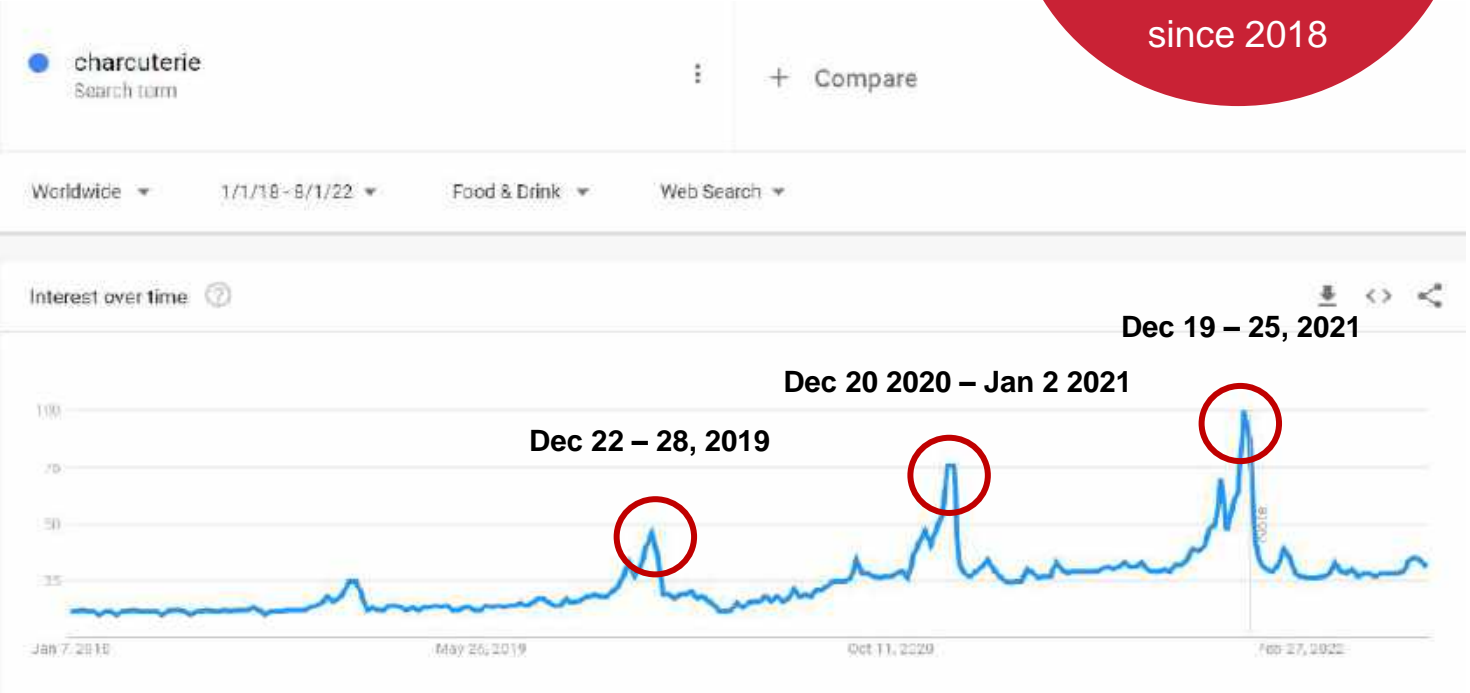
## Snacks for Social Bonding

### Fuel For Fun

Social snacking responds to a variety of consumer needs post-pandemic: sharing quality time with loved ones, affordability, and interest in experimenting at home.

- Mintel 2022

Globally, the search term for "Charcuterie" has gained interest up to **4 times** since 2018



*“Charcuterie”* Refers to the "culinary art of preparing meat products" in French

Charcuterie boards are starting to gain popularity as they are both appealing in flavour and aesthetically pleasing. Consumers could customise these boards easily with any of their favourite snacks and ingredients, beyond the conventional meat and cheese board.



### Sodebo Aperi'dip 4-in-1 Dip With Breadsticks France

Sodebo has created a ready-to-serve tray with crispy mini breadsticks to dip in 4 different spreads – Hummus, Tzatziki, Tuna & Sun-dried tomato.

charcuterie cheese board  
1.1B views

How to: Charcuterie Board  
2021-4-22

MAKE A LARGE CHARCUTERIE BOARD WITH ME  
6-25

The sundried tomatoes hit different 🍅🧀🍷...  
2021-8-23

CHARCUTERIE BOARD GOALS for the Kentucky Derby //...  
justinmschu... 22.5M

make a large charcuterie board with me 🍷🍷🍷 its always my...  
mrs\_laine 15M

Source: Mintel, Google Search Trends, The List, Tiktok

## PERMISSIBLE INDULGENCE IN SNACKING

# Evolving Base Formats

### A Healthy Twist

Potato and corn chips base are now things of the past. Consumers today are more conscious of their own health, wellness and the plant-based movement. Such awareness and changes in eating behaviour will further drive new product launches of healthy snacks in the form of vegetables, fruits and even salads.



### Crispy Salad Healthy Broccoli Chips

Indonesia

A 100% natural premium product hand cooked under low temperature technology, to preserve all the good things veggie has to offer. It contains antioxidants to fight cancer, boosts immune system and brain health, is high in fibre and reduces the risk of heart disease.



### Other foods Crunchy Ladies Fingers Okra Snack

United Kingdom

The vegan friendly, ready-to-enjoy product contains 100% natural ingredients and just a pinch of salt. It contains vitamin D and beta-carotene, which are both important for healthy skin and eyesight. They also combat fatigue and promote mental stamina.

# 84%

of Indian consumers (age 55-65) agree that snacks can be both healthy and tasty



### Leader Snack Snack Ma Salade

France

Leader Price Leader Snack Ma Salade Tuna, Pasta and Raw Vegetable Salad contains cooked pasta, natural tuna, hard-boiled eggs, sweetcorn, and tomatoes, with a light dressing featuring mustard and herbs. It includes snack positioning in the product line's name and comes with a fork for on-the-go eating.



## PERMISSIBLE INDULGENCE IN SNACKING

# Functional For Me

### The “Fun” in Functional Snacks

Better-for-you claims are here to stay. With the rise of afternoon snacking during the pandemic lock down measures, this resulted in a boon for healthier snack options as consumer fear “Covidbesity”; COVID-linked obesity.

- Food Navigator Asia 2021

### Mondelez non-HFSS snacking series United Kingdom & Ireland

Mondelēz International released 8 newly reformulated biscuits, confectionery and snacks that will not be categorised as high in fat, salt or sugar (HFSS). It aims to reduce sugar by 30% and saturated fat by 70% compared to the average market of sweet adult biscuits.



# 40%

of Singaporean consumers agree that low salt content is one of the most important factors when shopping for food



### Insane Gra!n Supergrain Sorghum Puffs United Kingdom

Insane Gra!n Supergrain Sorghum Puffs provide 1.5 times more iron than spinach, over three quarters of potassium of a banana and 97kcal per bag, and are said to be loaded with an insane amount of gut-friendly bacteria. This vegan friendly product is gluten free and serves as a source of fibre.



### Tasti Go On... Indulge Cereal Bar New Zealand

Tasti Go On... Indulge Choc Caramel Cereal Bar contains rice pops and crunchy rolled oats, licked in a lavish layer of caramel and creamy choc coat. This product provides less than 100 calories per bar, is a source of fibre and bears the WeightWatchers Reimagined Loves logo.



### Befco Lightly Salted Brown Rice Crackers Japan

Made with 100% Japanese brown rice and rich in vitamins which helps to lower changes in blood sugar. These crispy rice crackers also includes five of 24 brain training quizzes for the elderly.

Source: Mintel, Confectionery Production, Food Navigator Asia

## PERMISSIBLE INDULGENCE IN SNACKING

# Shareable Small Bites

# 21%

of Thai consumers purchased smaller pack sizes of ice cream more often during the pandemic



### Less Is More

One key observation in the snacking industry is consumers scaling down to smaller bites; be it controlling their calorie intake or fragmenting into smaller meals. Today, manufacturers are “snackifying” all sorts of segments from desserts to alcohol and even ready meals.



### Melvado's Ondeh Ondeh Brittle Singapore

Re-imagined local delights are transformed into bite-sized brittle snacks to have them on-the-go. Ondeh Ondeh flavour is inspired by the local traditional kueh - made with a fragrant pandan coconut base and crunchy gula melaka coconut sprinkles.



### Sun-Maid Bites USA

A new bite-sized granola snack made with ingredients including oats, nuts and fruits and comes in 4 flavours – Banana Split, S'mores, PB & J and Birthday Cake.

### Magnum Vanilla and Chocolate Ice Cream Bites Australia

The iconic stick-form ice cream, Magnum, now comes in bite-sized form, perfect for snacking and sharing.



### pancake cereal 1.6B views

Regular pancakes cooked into tiny coin-sized format topped with milk, just like cereal. The hashtag #pancakecereal has racked up over a billion views on TikTok.



*“We see an opportunity for brands to capitalise on the small-bites space. Bite-sized creations are brilliant - they not only allow consumers to portion control and indulge in what they love but also trial adventurous flavours without the full commitment...”*

- Benny Yap, Senior Marketing Manager (Flavour Solutions APZ)

Source: Mintel, McCormick FONA, TikTok, Food Business News, The Ladies Cue  
Photo Source: Today Show



A top-down view of a white plate containing several pieces of grilled squid. The squid is charred and coated with a thick, white, creamy sauce. It is garnished with fresh green herbs and small, golden-brown fried items. To the right of the plate is a small, bright blue bowl filled with a smooth, yellow-orange puree, with a silver spoon resting inside. The background is a vibrant blue surface with a purple accent in the top left corner.

# III. Flavouracle

**McCormick® Flavour Forecast® 22<sup>nd</sup> Edition:**

*Plus Sweet*

Go beyond one dimension of flavour by balancing sweetness with other flavours



## UNSUNG INFLUENCES

showcases the *nuance, complexity,* and *passion* that goes into a perfect bite...



the investment, savouring and saving of time through cooking

# TIME AS A LUXURY INGREDIENT

# PLUS SWEET



a shift in sweetness from the spotlight to supporting role



celebrating the power of woman in food and flavour



# FOOD STORIES





# PLUS SWEET

Skip the full-on sugar rush. Everything we once thought about what it means to be sweet is off the table.

Sweetness is intermingled with any and all other flavours to create an unexpected complexity that delights the senses in a brilliant new way.



## Seeking Balance

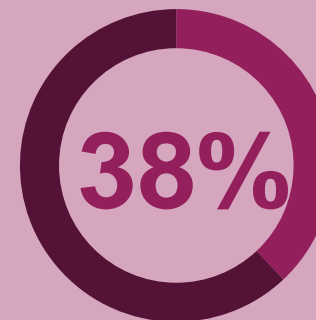
"We have studied how global consumer attitudes have shifted due to the COVID-19 pandemic, and one of the major themes is **balance**..."

With this new appreciation for balance comes a desire to move past the super-sweet and indulgent comfort foods of the early pandemic, and instead to seek out more complex, layered food experiences."

– Allie Herold, Consumer & Market Insight Manager, US



## Sweet & Spicy



of urban Thai consumers would like to try dishes with a combination of sweet & spicy flavours

Source: Mintel SEA Flavour Trends



# PLUS SWEET *Recipes*



## MISO CARAMEL SAUCE

Umami & Salty + **SWEET**

Sweet caramel and the rich, salty umami of miso come together to create an unexpected complexity to delight the senses in this unique caramel sauce.



## LONDON FOG LATTE WITH SWEET CHEESE FOAM

Floral & Salty + **SWEET**

A close cousin to bubble tea, cheese tea is cold black or green tea topped with a layer of blended milk and cream cheese foam, sweetened with honey, and finished with a kiss of salt.



## SWEET CORN 'RIBS' WITH MAPLE GLAZE AND MISO BUTTER

Smoky & Umami + **SWEET**

Charred and slathered with a sticky-sweet glaze and rich, umami filled butter, corn "riblets" are finished with a crunchy topping of smoked paprika pumpkin seeds





# PLUS SWEET *Snacks*



## SWEET & SPICY GOCHUJANG CHOCOLATEY MALT BALL (MALAYSIA)

### Spicy + **SWEET**

Crispy Bola Malt Pedas & Manis Bersalut Dengan Choco Susu by Network Foods, Malaysia is a special edition chocolate malt ball snack combined with spicy gochujang.

## FOUR CHEESE & HONEY POTATO CHIPS (JAPAN)

### Savoury + **SWEET**

Calbee Kuseninaru Four Cheese & Honey Potato Chips are flavoured with sweet honey and four types of rich cheese including camembert, blue cheese, emmental cheese and gouda.

## HONEY BARBECUE FLAVOURED POTATO CHIPS (INDONESIA)

### Smoky + **SWEET**

Lay's Honey Barbecue Flavoured Potato Chips are free from artificial flavours, and is described as sweet, smoky, crispy and scrumptious.

Source: Mintel GNPD



# PLUS SWEET *Sides*



**HOT HONEY RUB WINGS (USA)**

Spicy + **SWEET**

Wingstop's Hot Honey Rub flavor pairs the sweetness of honey with a mouthwatering kick of heat from cayenne pepper and ancho chili.



**HICKORY AND BROWN SUGAR WINGS (AUSTRALIA)**

Smoky + **SWEET**

A smokier take on traditional BBQ sauce by Pizza Hut Wing Street. Bring the fire pit flavour to your wings with this smoky sweet BBQ sauce from Sweet Baby Ray's.



**BLAZED & GLAZED WINGS (USA)**

Herbal + **SWEET**

The wings are flavoured with hemp seeds, strawberry, cayenne pepper, and terpenes. On Wingstop's menu, it is described as "sticky, sweet, and herbal".



## UNSUNG INFLUENCES

showcases the *nuance, complexity,* and *passion* that goes into a perfect bite...



the investment, savouring and saving of time through cooking

# TIME AS A LUXURY INGREDIENT

# PLUS SWEET



a shift in sweetness from the spotlight to supporting role



celebrating the power of woman in food and flavour



# FOOD STORIES

Discover the future of flavours today

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