

In a nutshell: tapping into the power of healthy snacking.

Health-Focused Snacks (HFS): Drivers, Outlook and Winning Tactics To Help Accelerate Growth

Key Takeaways



- Health-Focused Snacks (HFS) categories have been growing +2% vs. Total Snacks
- We expect the explosive growth in GLP-1 medication users to benefit HFS as they shift to healthier foods
- Top Snack CPGs are being outpaced in HFS sales growth
- HFS products claiming carb and fat conscious benefits are among the best performers – gaining in both dollar and unit share
- To harness the forward-looking growth in HFS, CPGs should consider key product, marketing and channel strategies

40% of Americans say that improving their health & wellness is a top priority

Health-Focused Snacks (HFS) have consistently **outperformed Total Food dollar growth** over the past three years, by an average of 2pts

Growth in GLP-1 weight loss medication could further boost HFS

GLP-1 Medication user growth



User population increases between 5 to 35x its current size¹

Healthier food choices by GLP-1 Medication users

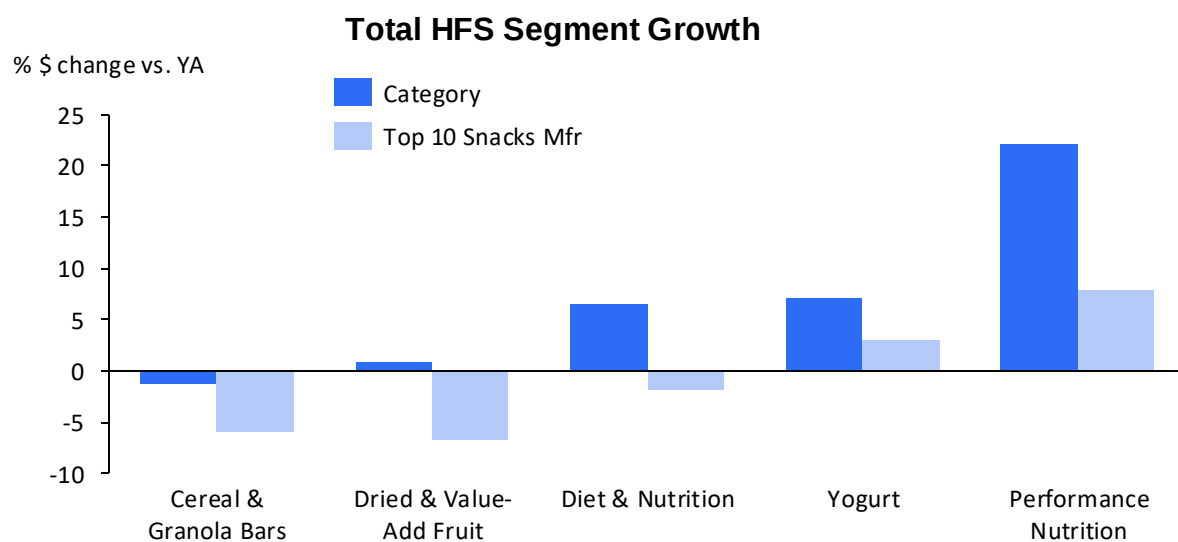


Users reduce food consumption² and move towards healthier food choices³

Positive momentum for HFS

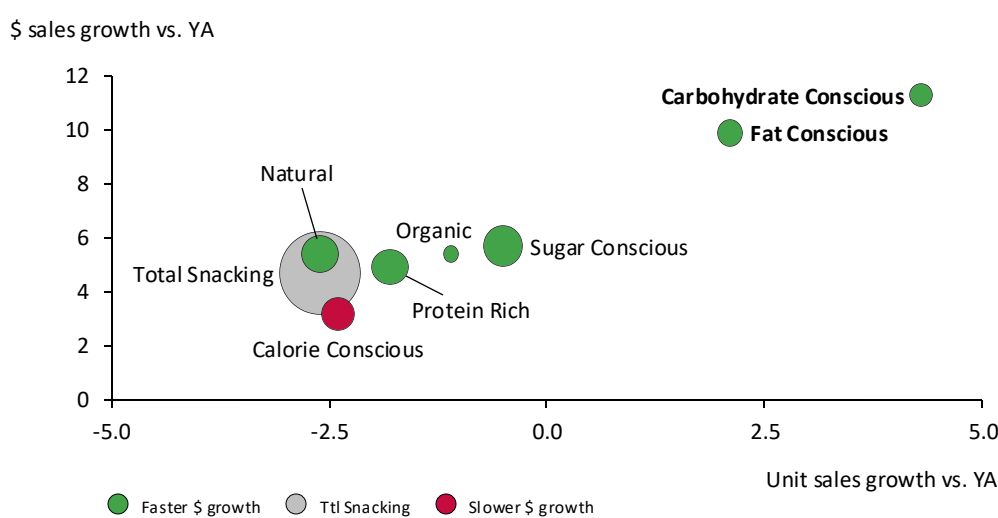


Top manufacturers are missing out on the HFS opportunity



Better For™ You claims and positioning has been a winning strategy, with some claims stronger than others

Sales Growth for Top Health Claims in Snacks



Strategies for a winning future in HFS



Stake Your Claims:

Prominently market and display winning health claims



Don't Compromise Taste:

Pair indulgence with high nutritional value



Expand & Differentiate:

Expand familiar brands via line extensions with distinctly different packaging and formulas



Go Omni:

Capitalize on the omnichannel shopper with strong on and offline strategies



1: Goldman Sachs: GLP-1 Market Intelligence Report
<https://www.goldmansachs.com/insights/pages/glp-1-market-intelligence-report.pdf>

2: Just Food Report: GLP-1 weight loss drugs a risk to the largest food industry – eating less
Background: supported by Value Gene Report: Navigating Change: The Impact of GLP-1 on the Food Industry and Dietary Habits – Value Gene Consulting Group, supported by WrightWaters recommendations
The Incubator follows with using GLP-1 meds: www.usda.gov/newsroom/story/and-learn-recommendations-the-best-and-worst-foods-to-eat-when-taking-a-gl-1-medication-food.com

3: Value Gene Report: Navigating Change: The Impact of GLP-1 Drugs on the Food Industry and Dietary Habits – Value Gene Consulting Group, supported by WrightWaters recommendations
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