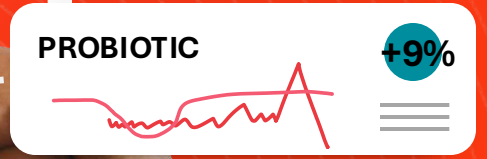


THE FUTURE OF FUNCTIONAL SNACKS

Snacks that multitask



Convenience. Indulgence. Nutrition. Consumers in the USA are getting hungrier for foods that **multi-task**.

They have the functional munchies.

And the demand for foods that serve multiple needs and an array of occasions is redefining the snacking category.

Traditional snacks like candy bars, chips and cookies are being fortified with vitamins and supplements.

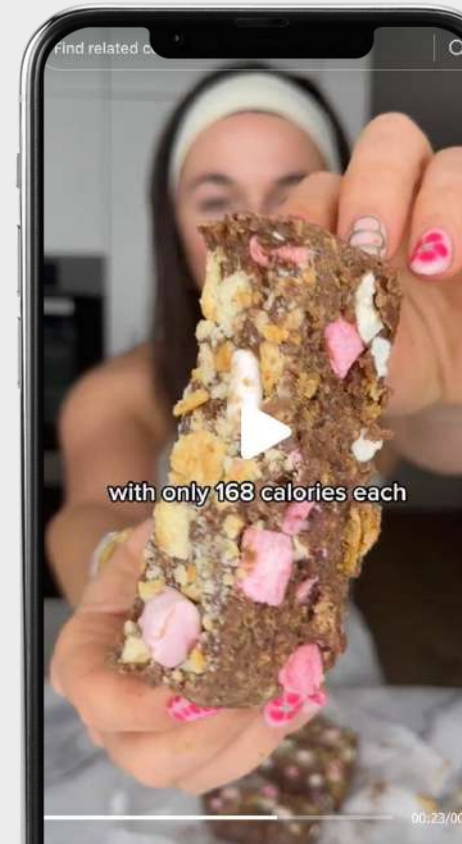
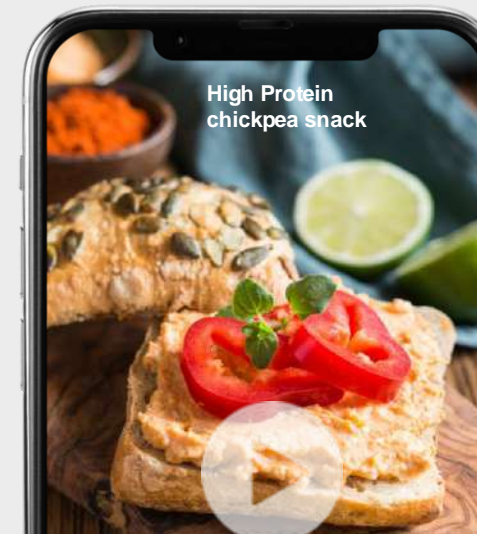
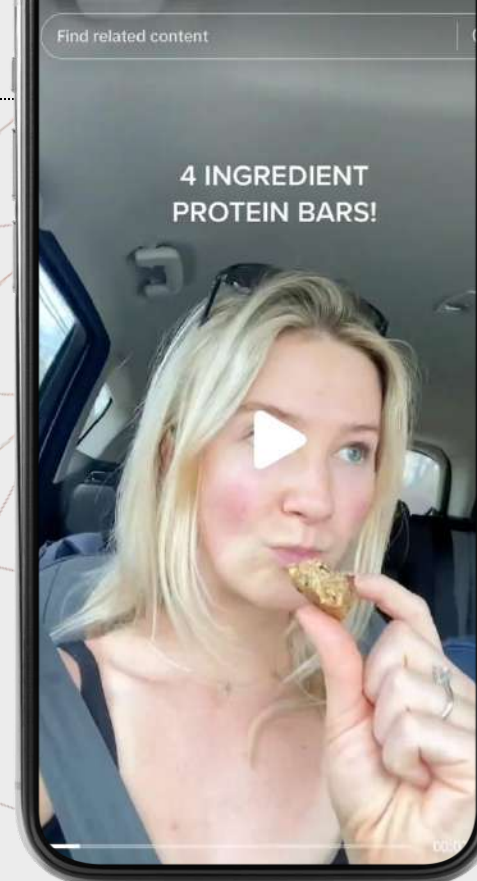
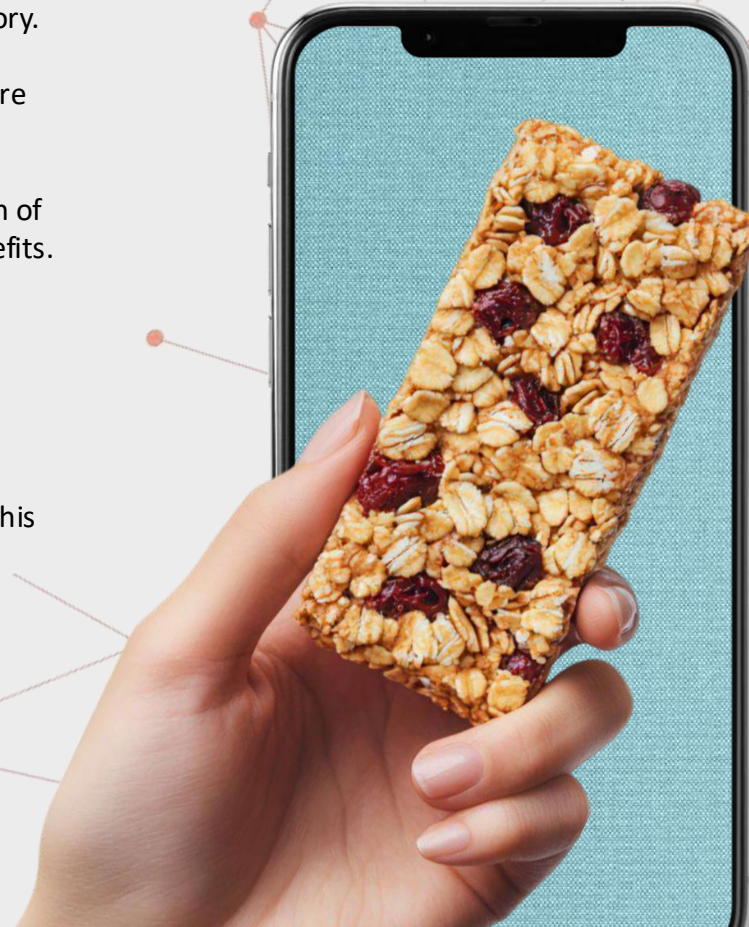
While challenger brands are offering a new generation of snacks that are tasty and packed with nutritional benefits.

The functional snacks space is now a hotbed for innovation.

New formats. New ingredients. New benefits.

In this report, we are going to analyze what's next in this space.

We will explore the emerging trends and new opportunities for brands in 2025 and beyond.



We are Black Swan Data

The insights inside this report do not come from surveys, panels or focus groups. There are no questions asked. Nor any prompted responses.

Our technology applies AI and predictive analytics to millions of social and online posts to understand consumer behavior.

It identifies future consumer needs and connects and predicts granular-level trends with **89%** accuracy.

Leading CPG brands are leveraging this data to make faster, more confident, evidence-driven decisions along each stage of the innovation process.



Our data explained

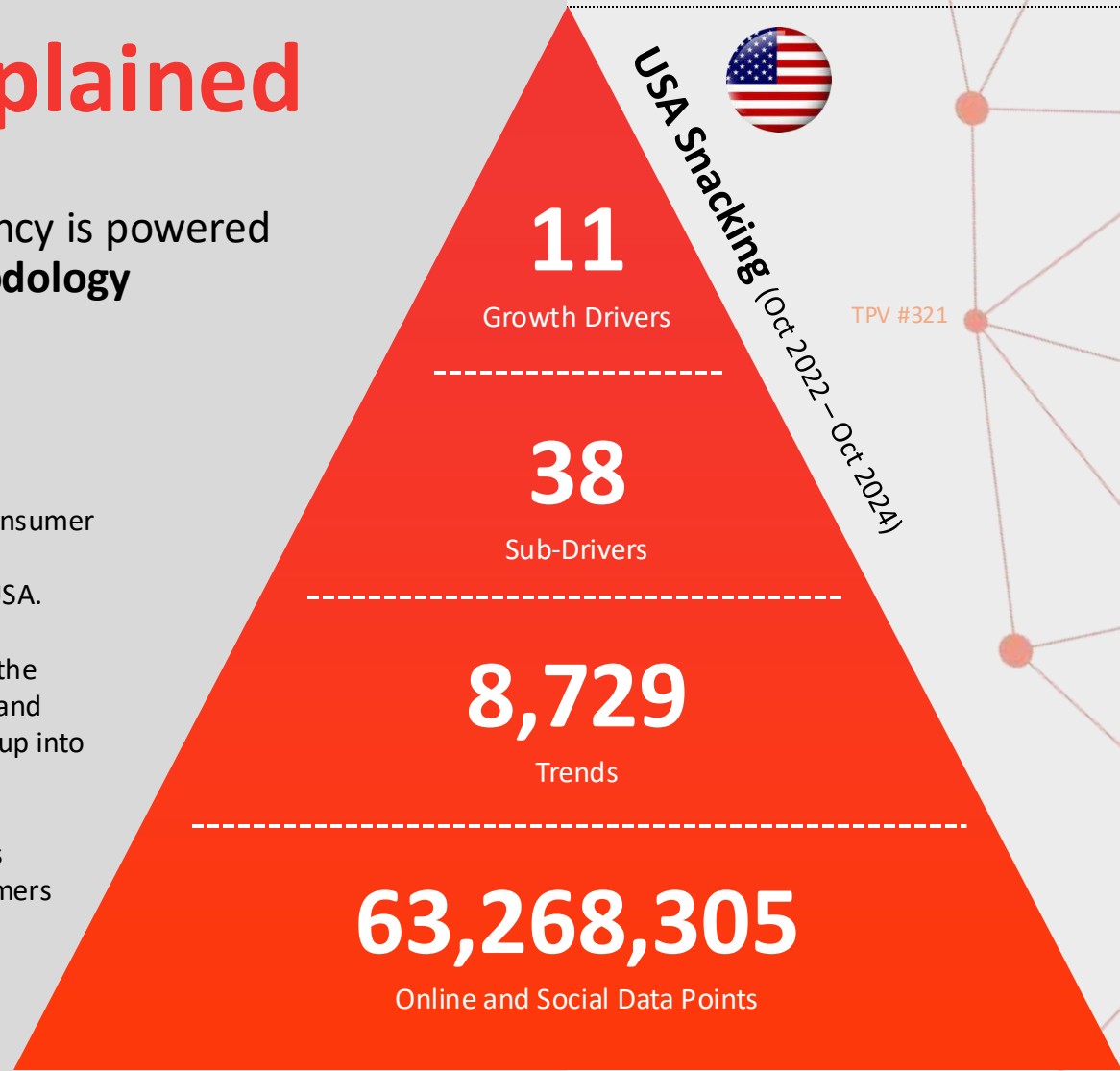
Our platform and consultancy is powered by our unique **data, methodology** and **metrics**.

How does it work?

Our platform retrieves all the relevant consumer posts in a category; in this example, **63+ million** posts related to snacking in the USA.

We use AI and data science to isolate all the individual trending topics and behaviors and understand how they cluster and ladder-up into category growth drivers.

This dynamic segmentation framework is refreshed monthly and evolves as consumers and the category evolves.



TPV #24

TPV #321

Metrics

Trend Prediction Value (TPV)

Ranks every trend based on its future growth potential.

Volume

Total number of unique posts over a 2-year timeframe.

Growth

The year-on-year increase or decrease in conversation volume around a trend.

TPV #4



Trending **benefits**

The mature, well-established functional trends in this space relate to **protein**, but needs connected to **gut health** and **mental health** are growing in relevance.

We've mapped the relevant themes and benefits onto a Maturity Curve to analyze their relevance **NOW** and **NEXT**.

The mature phase is dominated by trends like **Bulking Up** and **Better Performance**. Protein is dominating the functional snacks space right now.

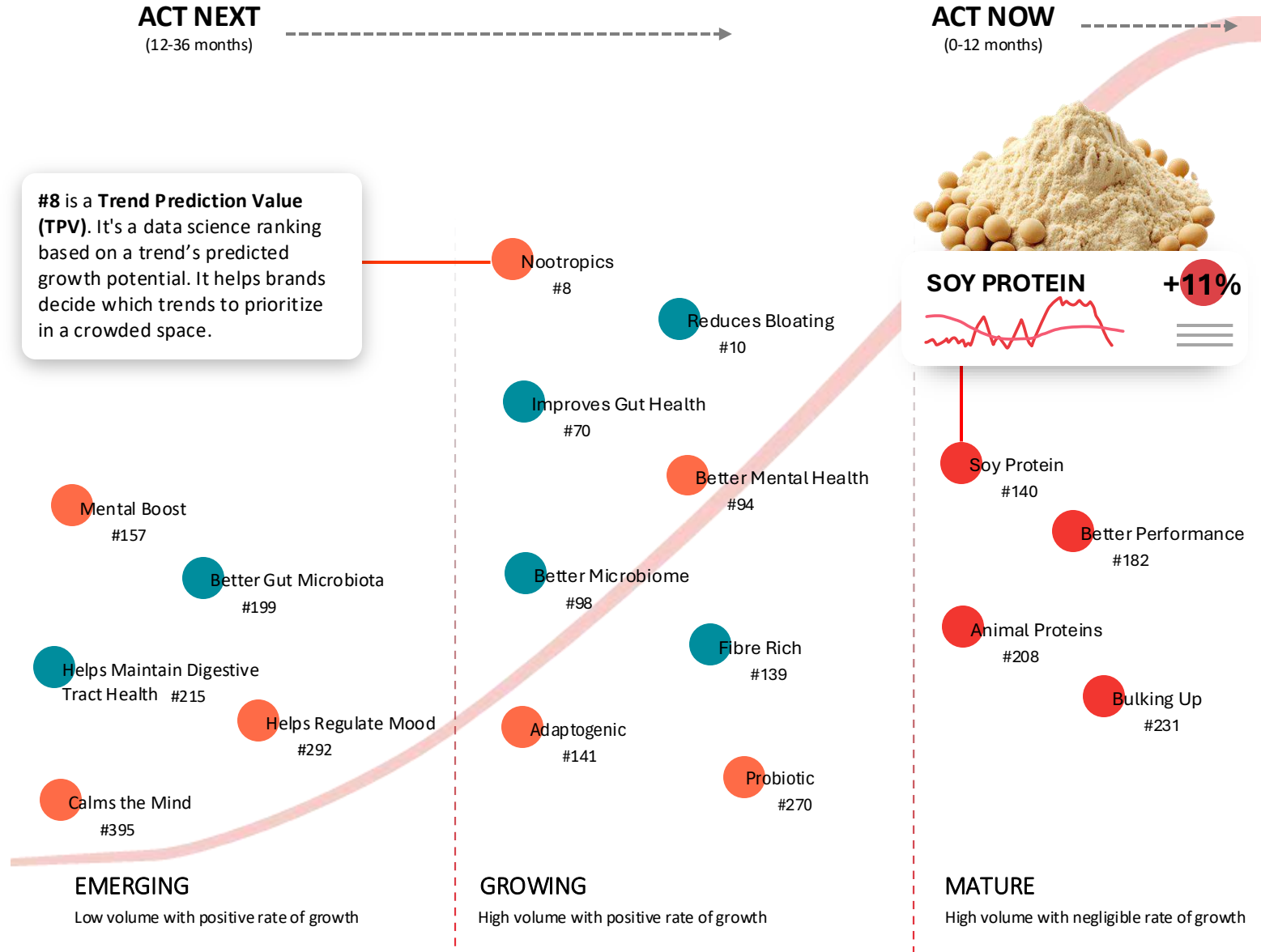
But the market is reaching saturation.

Our trend data tells us the functional needs to prioritize next connect to **Better Mental Health** and **Improves Gut Health**.

More and more consumers want snacks that deliver holistic wellbeing benefits, like maintaining a healthy gut, mind and their microbiome.

KEY: ● Mind ● Protein ● Gut Health

Trends associated with Active Ingredients, USA Snacking (Oct 2022 – Oct 2024)



Trending products

Functional snacking is currently dominated by bars and added protein products. There is an emerging white space for **gut** and **mind-boosting** snacks in new formats.

The dominance of the protein bar is visible in our data.

More diverse formats are emerging, including **Cookies, Chips** and **Popcorn**. But the saturation of this space makes it difficult for brands to differentiate.

The opposite is true for snacks in the **gut** and **mind** space.

Very few products surface in our data. And the formats are limited too.

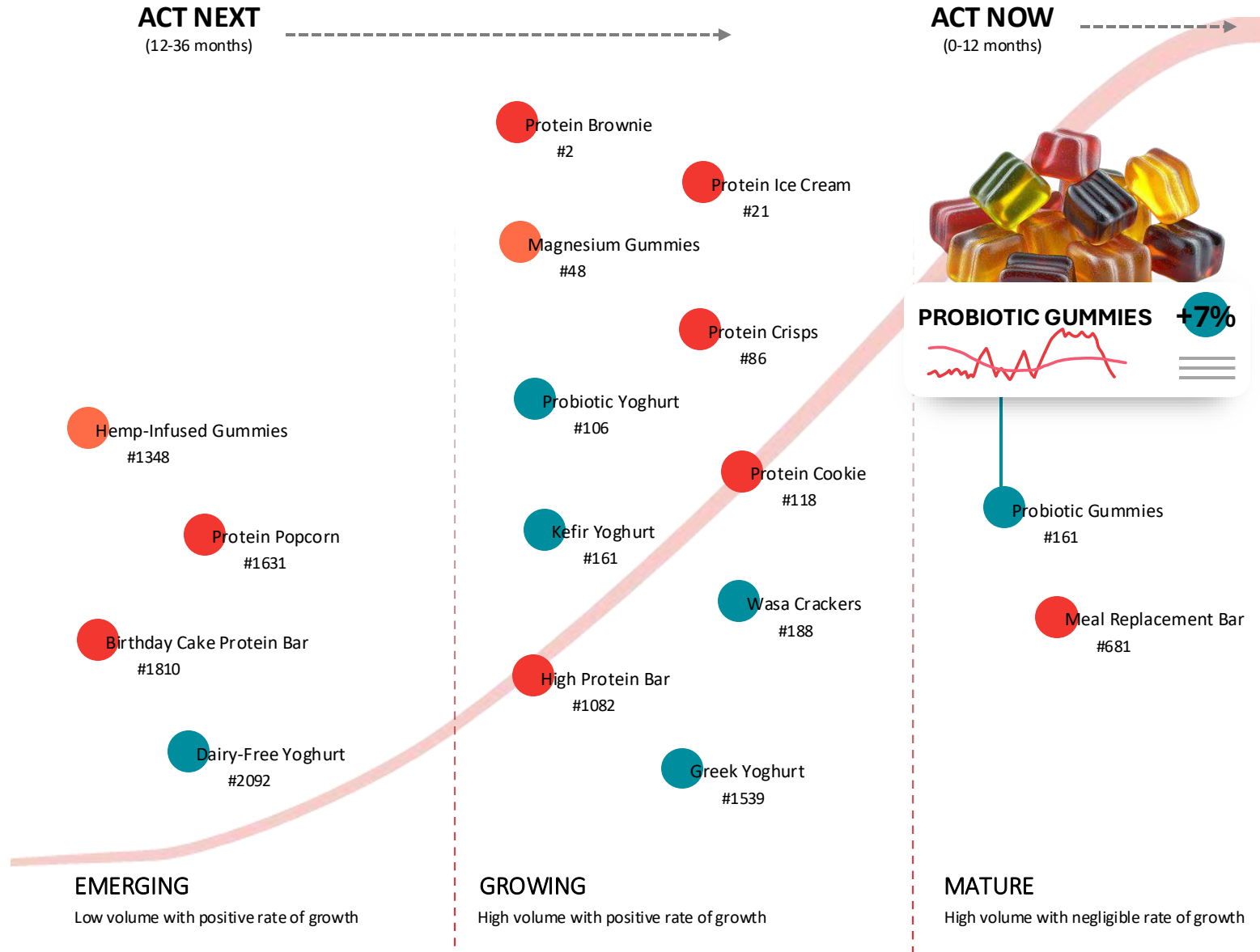
Probiotic Gummies and **Yoghurt** helps consumers' digestive needs; with the format aligned to what consumers expect in this benefit area.

But while we do see the presence of stress reducing **Hemp-Infused Gummies**, choice is limited in this space.

As such, there are clear white space opportunities for brands to move into this territory.

KEY: ● Mind ● Protein ● Gut Health

Trends Associated with Active Ingredients, USA Snacking (Oct 2022 – Oct 2024)



A gap in the **gut health space**

Consumers are demanding more **decadent** and **diverse** snacks to aid their gut health.

The products currently in-market are just a little boring. They are more supplement than snack.

Current options (like one-a-day gummies) lack the indulgence of options in the protein space.

Consumers want gut-friendly snacks that are **permissibly indulgent** – such as candy bars, popcorn, cookies and donuts.

Probiotic gummies also have a **dosage problem**.

They taste good, so consumers want to eat more than one. But that could lead to overdosing.

There's a gap in the market for lower-dose probiotic foods that are more snackable.

Many probiotic products also come in the form of yoghurts and kefir – which excludes **lactose-intolerants**.

Those with dietary restrictions have even less options in the gut-health space.

Trends consumers associate with **Probiotic Products**

Helps Maintain Gut Health

TPV #19
Vol: 1,185
Growth: +57%

Probiotic Gummies

TPV #124
Vol: 1,804
Growth: +7%

Probiotic Yoghurt

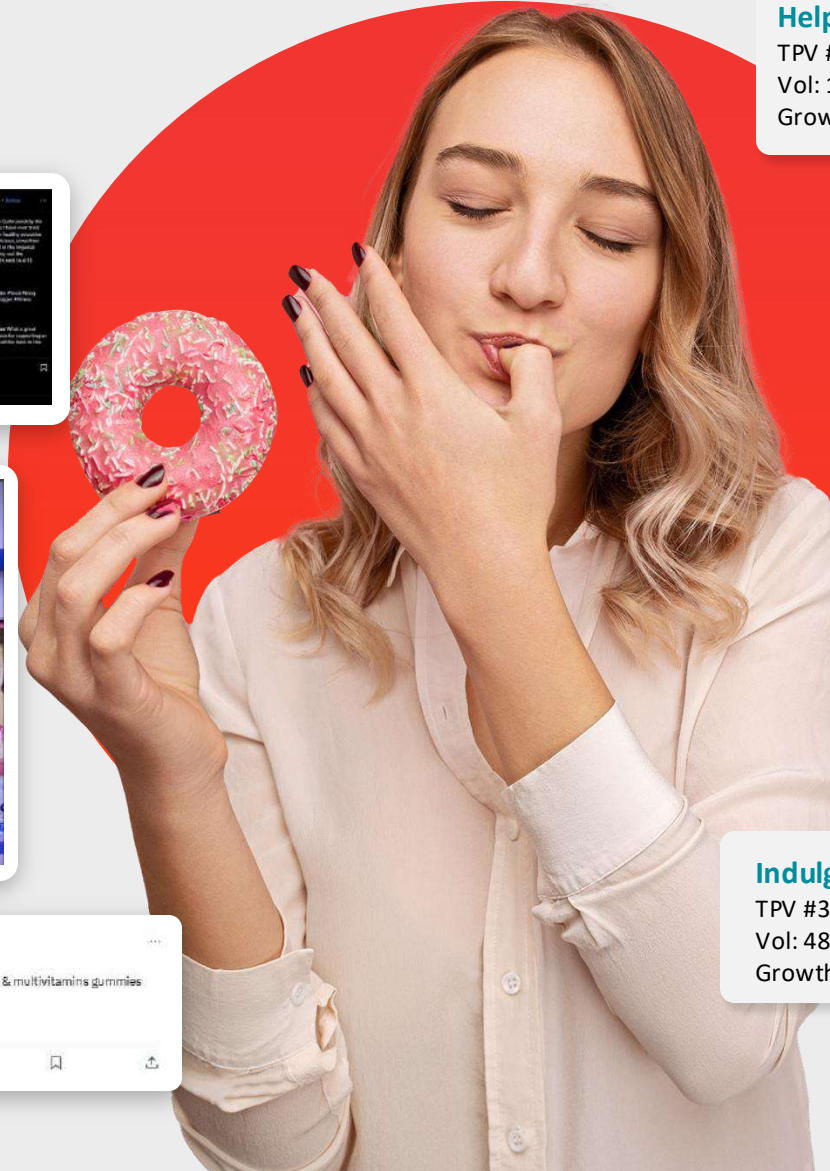
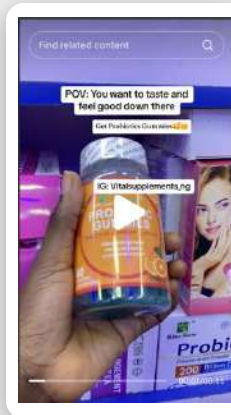
TPV #194
Vol: 3,636
Growth: +24%

Dairy Free

TPV #363
Vol: 140,025
Growth: +19%

Indulgent

TPV #371
Vol: 48,016
Growth: +33%



RECOMMENDATION

The next gen of **gut snacks**

Brands can tap into the **nostalgia** movement to elevate gut-friendly snacks – but must watch out for **side effects**.

Consumers want good for your gut snacks that look and taste like **'bad for you'** snacks.

To win in this space, brands should look to create probiotic products that resemble the decadent protein treats they see on-shelf.

This means rich, flavorsome bars and cookies.

Gen Z consumers specifically want probiotic snacks that deliver the emotional comfort and familiarity of treats they enjoyed as children.

Snacks like this have a dual benefit. They are gut-friendly and mood-boosting. They **multitask**.

These snacks must also have limited side effects. Particularly bloating.

Harmful additives or side effects kill the enjoyable snacking experience.

Trends consumers associate with
Probiotic Products



Microbiota

TPV #25
Vol: 7,381
Growth: +23%

Flavorsome

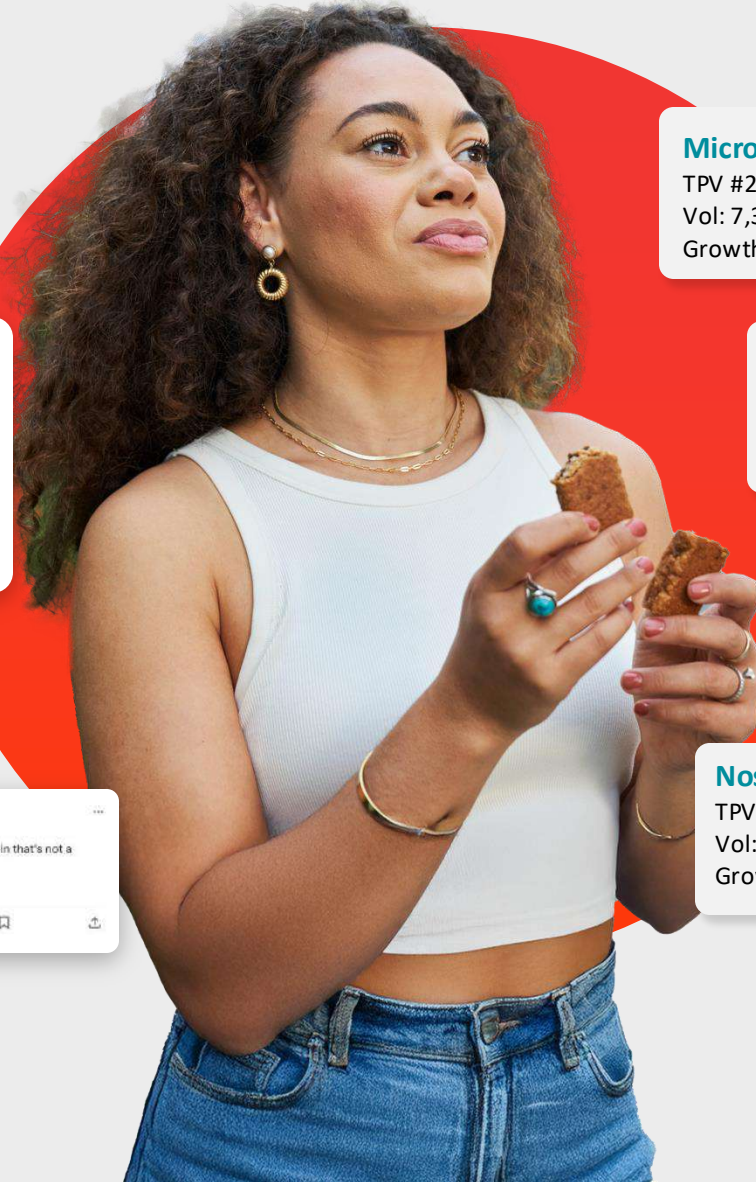
TPV #115
Vol: 1,911
Growth: +32%

Next Generation Probiotics

TPV #156
Vol: 790
Growth: +22%

Nostalgic

TPV #207
Vol: 32,139
Growth: +18%



Brand spotlight

BelliWelli offer a range of super indulgent, super gut-friendly snacks.

Their 'probiotic snacks with belly benefits' target the three fundamental needs in this space.

They are **conveniently snackable**, **indulgent** and **functionally nutritious**.

Each bar is individually wrapped and pre-portioned.

These snacks combine protein, probiotics, micronutrients – as well as being high in fiber and gluten-free to deliver **anti-bloating** properties.

With delicious, **nostalgic** flavors such as birthday cake and strawberry shortcake.

This brand has all the elements to win in the gut health snack space.

They give consumers the option of a tasty treat instead of a barrage of boring supplements to improve their gut microbiome.

BelliWelli

TPV #850
Vol: 107
Growth: +41%

Better Gut Microbiota

TPV #199
Vol: 160
Growth: +24%

Flavorsome

TPV #115
Vol: 1,911
Growth: +32%

Trends consumers associate with **BelliWelli**

Indulgent

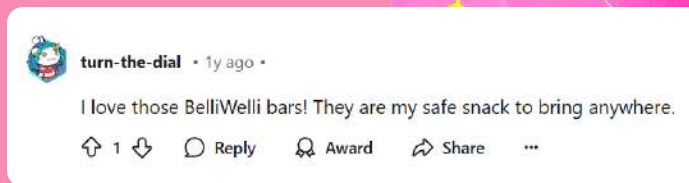
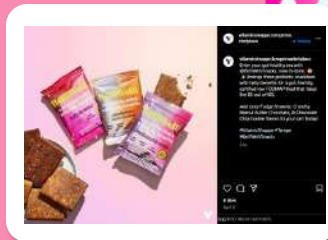
TPV #371
Vol: 48,016
Growth: +33%

Probiotic

TPV #270
Vol: 47,079
Growth: +17%

Crunchy Texture

TPV #470
Vol: 294,642
Growth: +5%



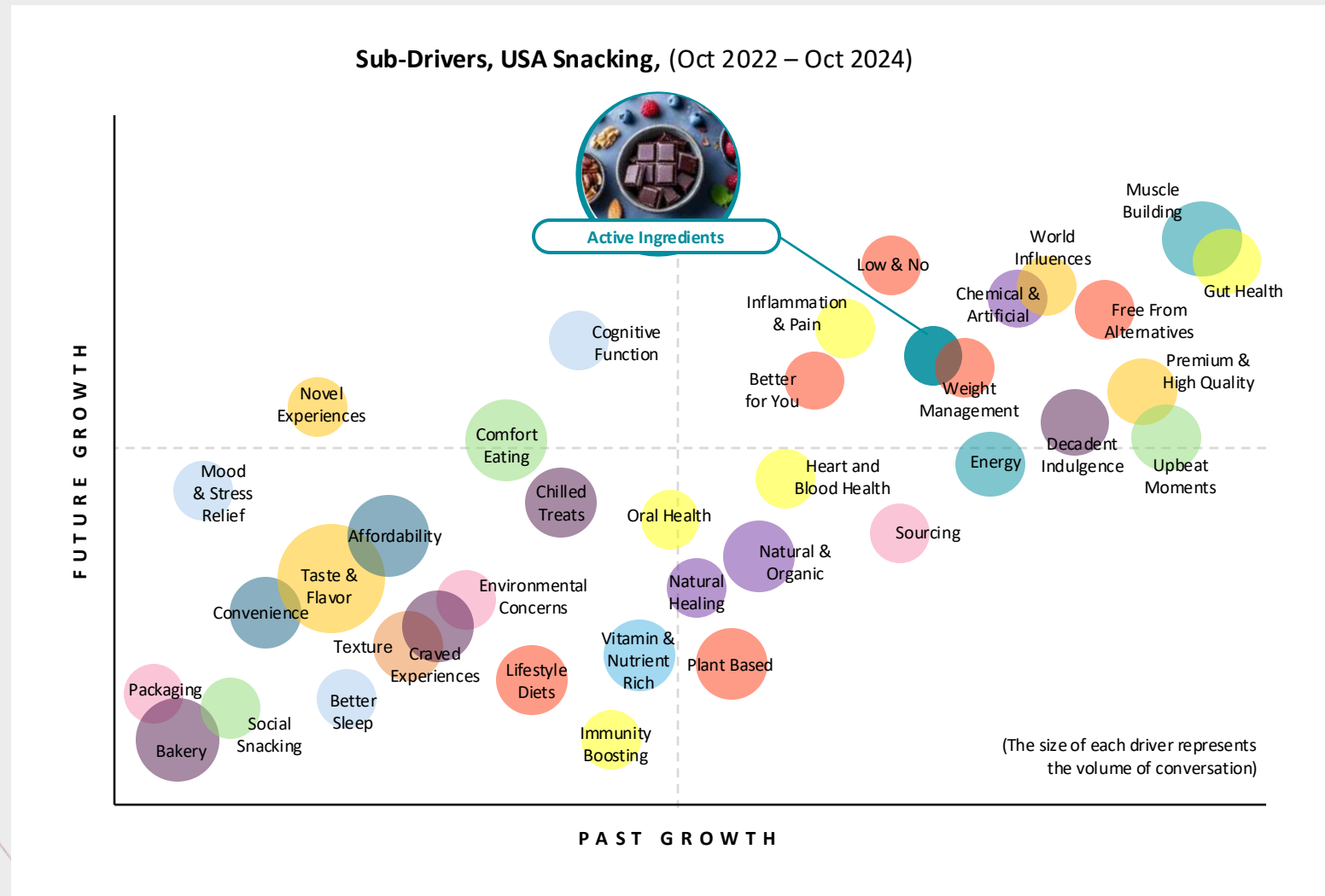
Want the full picture?

In this report we've only analyzed a morsel of the **38 drivers** in the **Snacking** space.

From **functional snacks** to the impact of **Ozempic**, **Sustainability** or **cross-category** trend influences – we can help answer your burning insight questions.

If you would like to explore the emerging trends and opportunities across any of the other drivers in your markets, get in touch.

We can also map your brand, portfolio or demand spaces to this framework helping you answer, **'where to play'** and **'how to win'** in 2025+.



Insight & Innovation solutions that **fit your needs**

We've only just scratched the surface of how our data and prediction metrics can **identify growth drivers, connect emerging trends** and **create innovation ideas**.

Our **expert consultants** and **self-serve platform** deliver the agility and answers our customers need in an increasingly fast-moving marketplace.

To find out how we can **kick-start your innovation process**, please get in touch.



Strategic Consultants

Lean on our expert consultants to jumpstart your insights transformation and apply the power of our data to answer your key business questions, including:

- Future & Category Landscape Mapping
- Activating Demand Spaces
- NPD Ideation and Springboards



Always-On Data

- Never miss a trend again with AI-powered predictions at your fingertips
- Our platform answers key consumer questions along the innovation process with predictive decision metrics
- Delivers enterprise-wide competitive advantage through smarter, timely, more consumer-centric innovation programs

BLACK SWAN DATA

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