

A year of innovation in biscuits, cookies and crackers, 2019

Health and nutrition demands continue to bring new ideas to biscuit innovation, while thin formats offer a permissibly indulgent route for sugary options.



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Global opportunities

1

Convey a modern appeal with exciting flavours

As a highly mature category, biscuits can **project a more contemporary image** among consumers by innovating with unusual and novel ingredients and flavours (eg Oreo's spicy chicken wing flavour). Doing so can encourage impulsive purchasing, especially among curious young consumers.

2

Extend the variety of pairing suggestions

Biscuit brands can **explore more fun and indulgent pairing ideas** (eg with soft drinks and ice cream) and serving suggestions to extend into new consumption occasions. A recent example is the Tim Tam Slam in Australia.

3

Tap into vegan and vegetarian trends

Considering the consumer interest in plant-based diets, there are opportunities for brands to reformulate to **tap into the vegan trend**. At only 15% of global NPD in this review period, the [vegetarian](#) claim is underutilised considering classic biscuit ingredients typically fall into vegetarian parameters.

Our pick of the most innovative launches in this review



"Most. Creme. Ever"

[Nabisco Oreo The Most Stuf Chocolate Sandwich Cookies](#) are limited edition and are said to have more cream than standard Oreo biscuits (US).



Made with cauliflower flour

[From The Ground Up Sea Salt Cauliflower Crackers](#) are made with real cauliflower flour and other vegetable and pulse-based ingredients (US).



Tap into the Tim Tam Slam craze

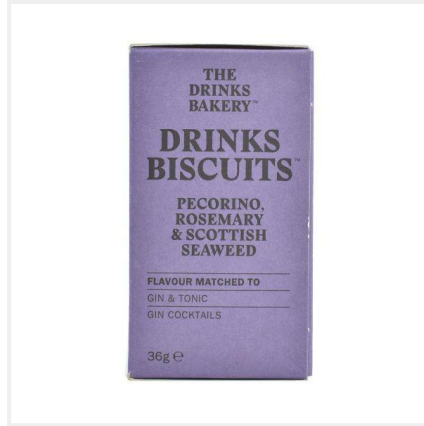
[Arnott's Tim Tam Slams Choc Hazelnut & Goey Caramel Flavour Biscuits](#) are designed for consumers to bite, sip and slam (Australia).

Biscuits, cookies and crackers meet Mintel Trends



Extend My Brand

Brands are expanding into new categories and demographics to find new business as well as intrigue consumers. [Diplom-Is Double Chocolate Chunk Cookies](#) are said to be perfect with the company's [Wanted Ice Cream](#) (Norway).



Sense Of The Intense

Intense physical and sensory experiences give life, brands and products deeper meaning. [The Drinks Bakery Pecorino, Rosemary & Scottish Seaweed Drinks Biscuits](#) are expertly paired to a range of alcoholic drinks (UK).

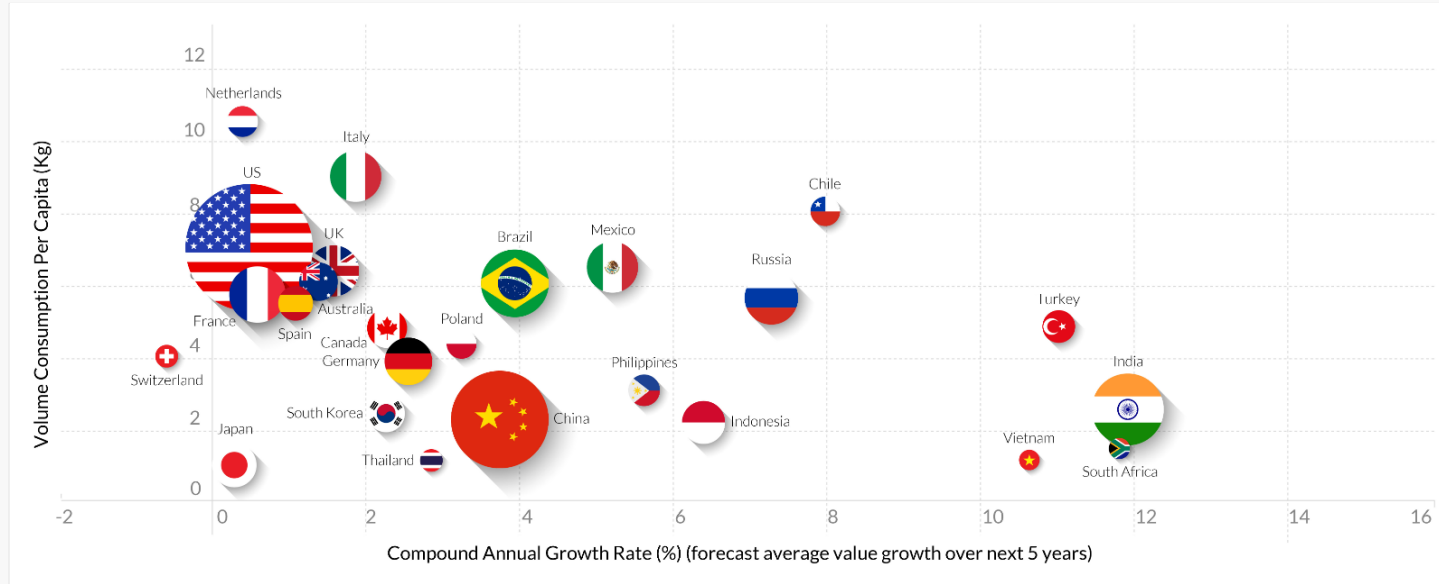


Hungry Planet

Our throwaway culture is becoming a contentious issue. [Barnana Dark Chocolate Organic Crunchy Banana Brittle](#) are made using 'upcycled' bananas which lack the cosmetic appeal to leave the producer's farm (US).

Global retail market overview: biscuits, cookies and crackers, 2019

India, South Africa, Turkey and Vietnam are the highest value growth markets for biscuits and crackers.



Base: bubble size is based on market value (US\$ estimate 2019); CAGR is based on forecast market growth value over the next five years in local currency

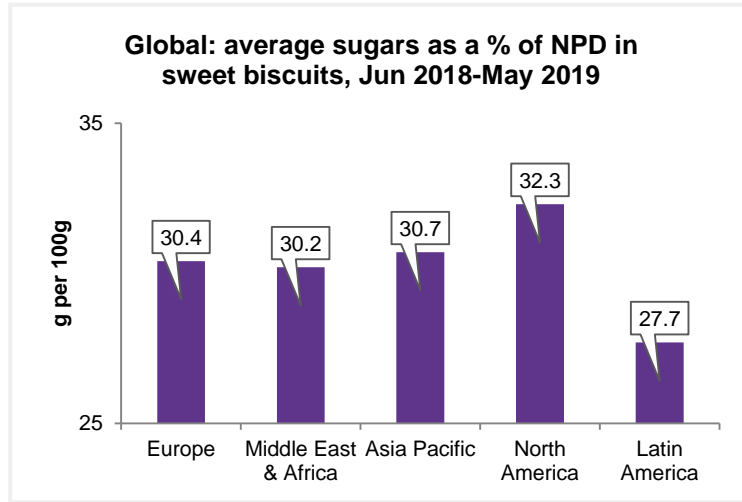
Source: [Mintel Market Sizes](https://www.mintel.com/market-sizes)



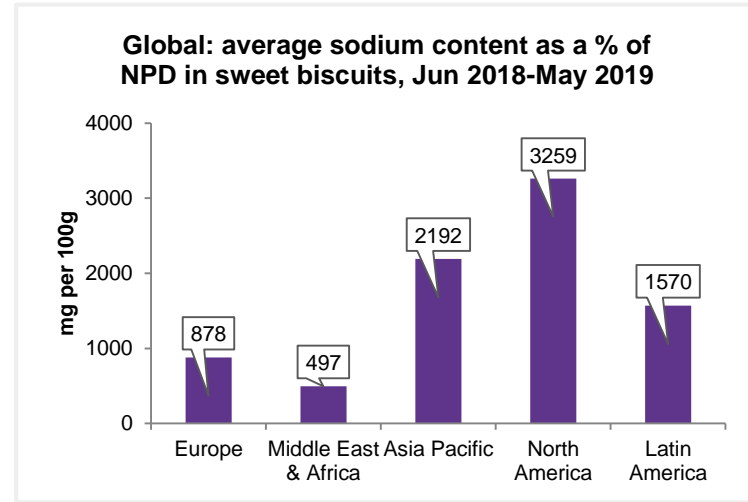
Read on [mintel.com](https://www.mintel.com)

Sugar and sodium levels by region

Consumers are increasingly aware of the health impacts of the foods they eat, and salt and sugar intake forms a crucial part of that.



[Mintel GNPD](#)



[Mintel GNPD](#)

EUROPE, MIDDLE EAST & AFRICA (EMEA)



Read on [mintel.com](https://www.mintel.com)

The opportunities: EMEA

1

Make pairing fun

Innovation is primarily focused on more serious food pairing suggestions such as cheese and alcoholic drinks, but brands can **explore more playful pairings** such as ice creams and other desserts.

2

Clean ingredients appeal

Ingredient lists which are short and **prioritise natural and organic ingredients** will appeal to the significant number of consumers who are seeking clean label biscuit recipes.

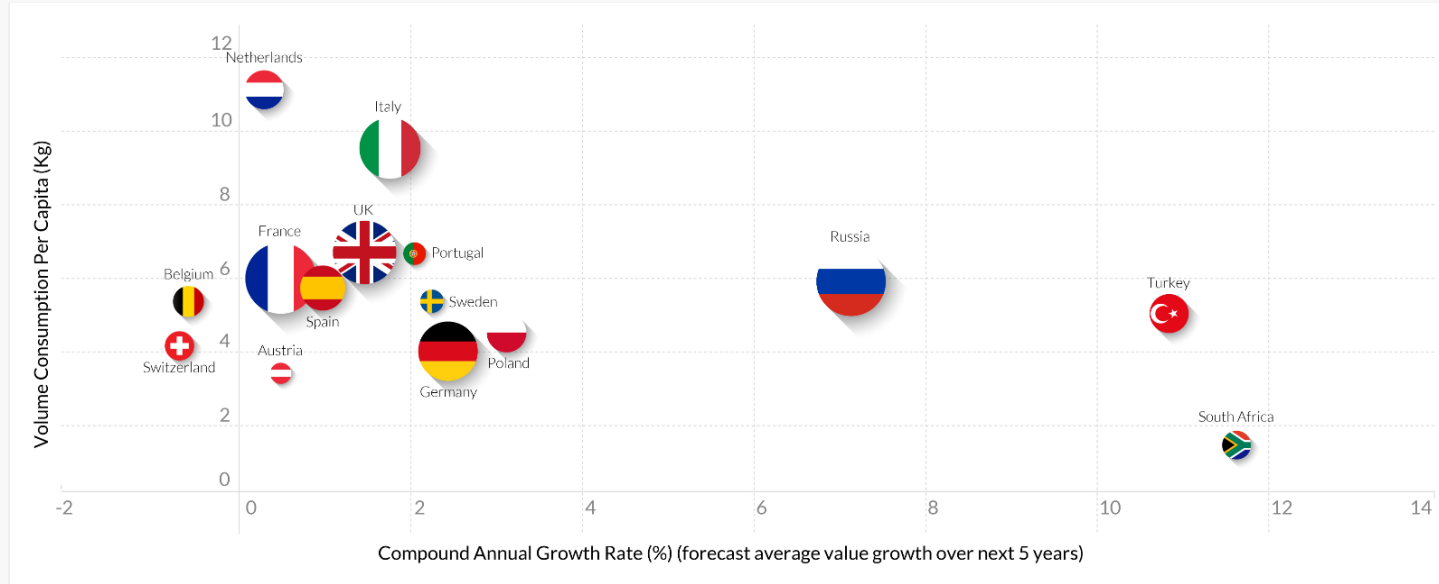
3

Permissible snacking

Biscuits which feature healthy and **nutritionally dense ingredients**, such as teff flour or so-called superfoods, can resonate with consumers who are looking for a better-for-you snack without sacrificing on indulgence.

EMEA retail market overview: biscuits, cookies and crackers, 2019

South Africa, Turkey and Russia are opportunity markets with moderate value growth forecast. Value growth in much of Europe is fairly stagnant.



Base: bubble size is based on market value (US\$ estimate 2019); CAGR is based on forecast market growth value over the next five years in local currency

Source: [Mintel Market Sizes](#)

Europe: imaginative approaches to flavours and pairing

Consumer engagement in the biscuits category can be encouraged through using innovative flavours and offering serving suggestions which are playfully indulgent (eg eating the biscuit with ice cream).

Consumers have an adventurous approach to new biscuit flavours

EXOTIC INGREDIENTS

64%

of biscuit consumers in Poland would like to see more [more exotic ingredients](#) (eg dried fruit, spice, nuts)

NEW FLAVOURS

30%

of sweet biscuit consumers in the UK are [interested in new flavours](#)

ADDED FLAVOURS

29%

of savoury biscuit consumers in the UK are looking for savoury biscuits with [added flavours](#)

Base: Poland: 1,816 internet users aged 16+ who have eaten sweet and savoury biscuits in the last six months; UK: 1,836 internet users aged 16+ who have eaten sweet biscuits in the last three months; 1,415 internet users aged 16+ who have bought savoury biscuits in the last three months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Alternative flavours and formats arrive in biscuits



Lemon, hazelnut and timut pepper
[Flavie's & Co Savoury Cookies with Candied Lemon, Hazelnut and Timut Pepper](#) are baked in France with fresh free-range eggs (France).



Filled Oreo pillows
[Choco Caramel Creme Filled Wheat Pillows](#) are described as sweet crispy wheat pillows with cocoa and a soft filling (Germany).



Hand-finished
[Percy's Chandelier Creams Rhubarb Shards, Custard & Cream Biscuits](#) are beautifully hand-finished and described as luxury layered biscuits enrobed in custard chocolate (UK).

New serving suggestions can enhance the biscuit-eating experience

In the UK, 45% of adults would like more advice on [how to pair savoury biscuits with cheese](#), while 37% would like more advice on how to [best pair with drinks](#).



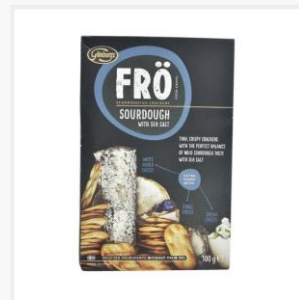
Perfect with a simple espresso

[Bauli Doria Amaretti Biscuits](#) is said to have a unique bitter-sweet flavour making it suitable for partnering with an after-dinner espresso, or for dipping into wine (UK).



With ice cream

[Double Chocolate Chunk Cookies](#) are described as 'real' American soft cookies that are perfect with the manufacturer's [Wanted Ice Cream](#) (Norway).



Pairing suggestions on front of pack

[Göteborgs Frö Sourdough with Sea Salt](#) are crispy baked Scandinavian crackers with a balance of mild sourdough taste and sea salt. They are said to be extra good with white mould cheese, goats cheese or cream cheese (UK).

Base: 1,705 internet users aged 16+ who have eaten savoury biscuits in the last three months

Source: Lightspeed/Mintel



Read on [mintel.com](#)

Biscuits which match specific alcoholic drinks

The Drinks Baker is a specialist bakery creating biscuits tailored to particular alcoholic drinks. The front of each pack features the flavour profile of the biscuit, along with "expertly profiled" matching suggestions. The range comprises of four varieties and their pairing suggestion.

[Mature Cheddar, Chilli & Almond Drinks Biscuits](#) – Belgian and barrel aged beers, lager, cider, Riesling, Malbec and peaty Islay whisky.

[Lancashire Cheese & Spring Onion Drinks Biscuits](#) – dry wines, lager, bitter beers, porter and stout.

[Pecorino, Rosemary & Scottish Seaweed Drinks Biscuits](#) – gin and tonic, and gin cocktails.

[Parmesan, Toasted Pine Nuts and Basil Drinks Biscuits](#) – prosecco, fruity wines, tropical and blonde beers, IPA and lager.



[The Drink Baker](#) (UK)

Energy-boosting cookies can appeal as an all-day pick-me-up



[Kong Strong Wild Power Guarana Cookies with Whole Milk Chocolate](#) (Germany)

Lidl has launched Kong Strong Guarana Cookies which take the name of the retailer's Kong Strong Energy Drink. The product comprises of caffeinated shortbread biscuits with milk chocolate. Each 125g bag of cookies contains a total of 300mg of guarana-based caffeine, which Kong Strong flags up is the equivalent of six cups of coffee.

The presence of caffeine could prove popular among the **9%** of adults in the UK who have a sweet biscuit [as part of breakfast](#). More broadly, they can appeal as a quick and tasty source of energy for any time of the day.

Base: internet users aged 16+ who have eaten sweet biscuits, chocolate biscuit bars, breakfast biscuits or cereal/snack bars in the last three months (February 2018)

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Europe: biscuits tap into natural trends

Ingredient lists which are short and focused on natural and organic ingredients appeal to consumers who are seeking a clean-label biscuit.

Biscuit consumers are looking for clean and natural ingredients

NATURAL HEALTHY
INGREDIENTS

37%

of sweet biscuit consumers in the UK are looking for [naturally healthy ingredients](#)

ALL-NATURAL INGREDIENTS

24%

of savoury biscuit consumers in the UK look for [all-natural ingredients](#) when buying savoury biscuits

NATURAL NPD

37%

of sweet and savoury biscuit NPD in Europe in this review period features the [natural claim category](#)

Base: 1,836 internet users aged 16+ who have eaten sweet biscuits in the last three months; 1,415 internet users aged 16+ who have bought savoury biscuits in the last three months

Source: Lightspeed/Mintel; Mintel GNPD

MINTEL

Read on [mintel.com](https://www.mintel.com)

Emphasising clean and simple ingredients and processing



Only contain what is needed

[L'Appétisserie Bio Shortbread Biscuits with PDO Auvergne Blue Cheese, Figs & Grapes](#) are said to contain only what is needed for a maximum rich taste (France).



Only simple ingredients

[BiologicaMente Organic Crackers with Sesame](#) has been made according to a simple recipe with pure olive oil and organic ingredients (Italy).



Raw ingredients

[Vitaorganic Handmade Tomato & Basil Raw Crackers](#) is based on an artisanal recipe featuring raw and superfood ingredients which are free from GMOs, lactose, gluten, preservatives and cholesterol (Spain).

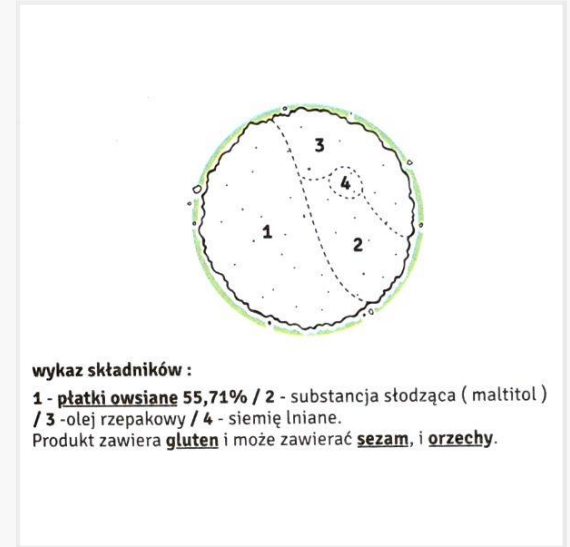
Illustrated ingredient chart aids consumer understanding of recipe composition

Poland's [Krasoń Avenki](#) bakery has launched plain oat cookies which contain just four ingredients. They are free from eggs, milk, palm oil and added sugar. The packaging features a cookie (pie) chart to illustrate the proportion of ingredients in each cookie.

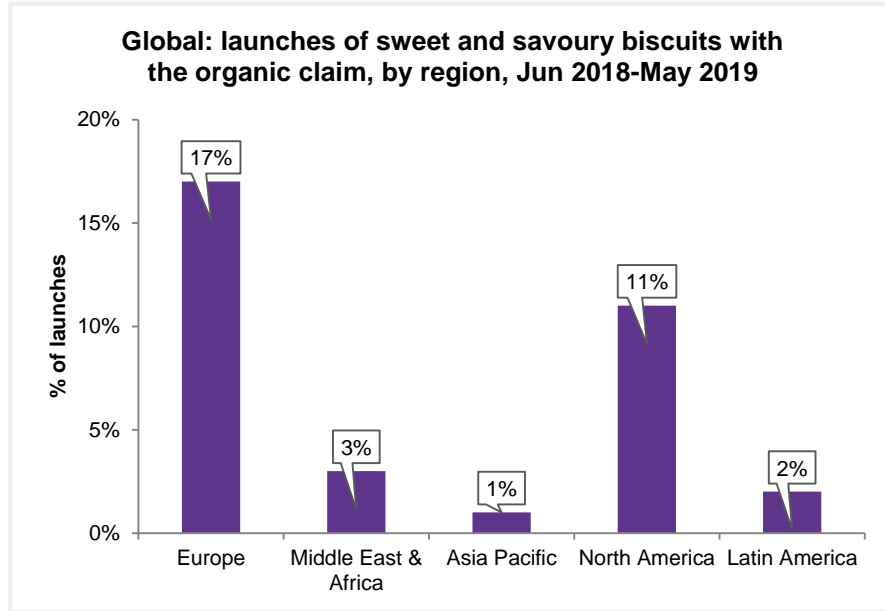
Consumers are increasingly looking for clean label claims and a visual representation of composition can aid consumer understanding and highlight the brand's transparent approach to ingredients.



[Krasoń Avenki Plain Oat Cookies](#) (Poland)



Europe leads for organic claims in sweet and savoury biscuits



Organic sweet and savoury biscuit launches continue to increase in Europe, having risen [five percentage points in the last five years](#). This growth in NPD is echoed in the broader food and drink category in Europe, where [17% of food and drink launches](#) over this review period feature an organic claim – up by five percentage points in the past five years.

In the UK, **54%** of adults say they are [buying more organic](#) products than they were a year ago. In Europe, between **29%** and **33%** of consumers are [prepared to pay more for organic](#) products, the lowest responses from Italy and Spain, and the highest in Germany.

Base: UK: 2,000 internet users aged 16+ (February 2019); 1,000 internet users aged 16+ in France, Germany, Italy, Poland and Spain

Source: [Mintel GNPD](#); Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Organics reach beyond sustainable farming practices



Spent malt from beer production
[Brewery Spent Grain Crackers with Einkorn and Fennel Seeds](#) are made with malt residues used to prepare beer, and are said to be the result of a local and zero-waste process. This organic and handmade product is 100% vegetable-based (France).



"Cookies for soil"
[Farm Brothers Organic Dark Chocolate & Sea Salt Cookies](#). Farm Brothers donate a percentage of turnover to help farms transition to organic farming practices to help protect soil health and biodiversity (Netherlands).



Renewable power
[Mjälloms Tunnbröd Organic Thin Crispbread Crisps with Sea Salt](#) are described as light and crispy organic crispbreads. The energy used to produce the crisps comes from renewable hydropower (Sweden).

Seeded varieties and alternative flours have consumer appeal

HEALTHIER

53%

of adults in the UK consider savoury biscuits a [healthier base for meals than bread](#)

INTERESTING SEEDS

50%

of adults in the UK say that savoury [biscuits with seeds are more interesting](#) than those without

WHEAT ALTERNATIVES

60%

of adults in Italy are interested in buying [biscuits made with non wheat grains](#) like amaranth, quinoa etc

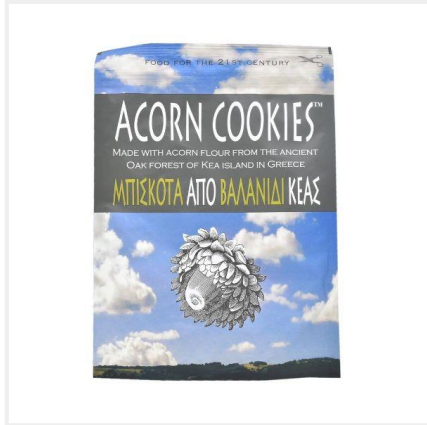
Base: UK: 1,705 internet users aged 16+ who have eaten savoury biscuits in the last three months; Italy: 1,931 internet users aged 16+ who have eaten sweet and savoury biscuits in the last six months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Niche flours add a point of differentiation



Acorn flour

[Oakmeal Acorn Cookies](#) are made with acorn flour from the ancient oak forest of Kea island in Greece. The ingredients are sourced from small Greek producers who practice sustainable farming (Greece).



Teff flour

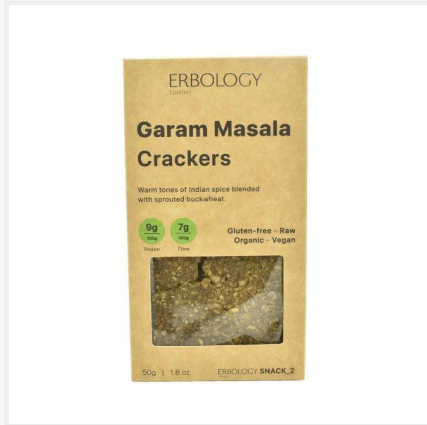
[Teff Biscuits Teffany Teff Cookies](#) are a 100% natural product and said to be ideal for those seeking healthy and natural eating. Teff originates from Ethiopia, where it has been farmed for more than 5,000 years (Spain).



Chestnut flour

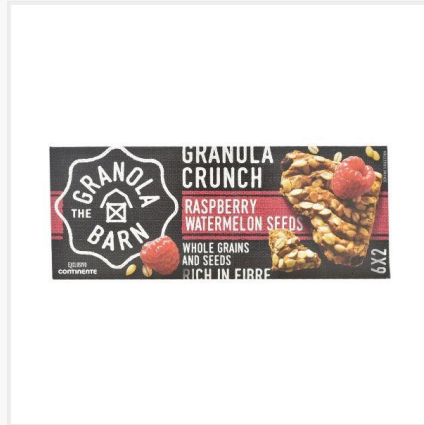
[Druid Bio Organic Crispbread with Chestnut and Rice](#). The gluten-free product is described as delicate slices of crispbread with chestnut and rice (Czech Republic).

Seeds, superfoods and sprouts give weight to healthful claims



Raw-baked

[Erbology Garam Masala Crackers](#) are spicy and blended with sprouted buckwheat. They contain protein and fibre along with naturally occurring iron, B vitamins and essential amino acids. They also contain phytonutrients and live enzymes (UK).



Extra protein from watermelon seeds

[The Granola Barn Wholegrain Crunch Biscuits with Raspberry and Watermelon Seeds](#) contain a mixture of grains, seeds, nuts and dried fruit. The fibre-rich product contains extra protein from watermelon seeds (Portugal).



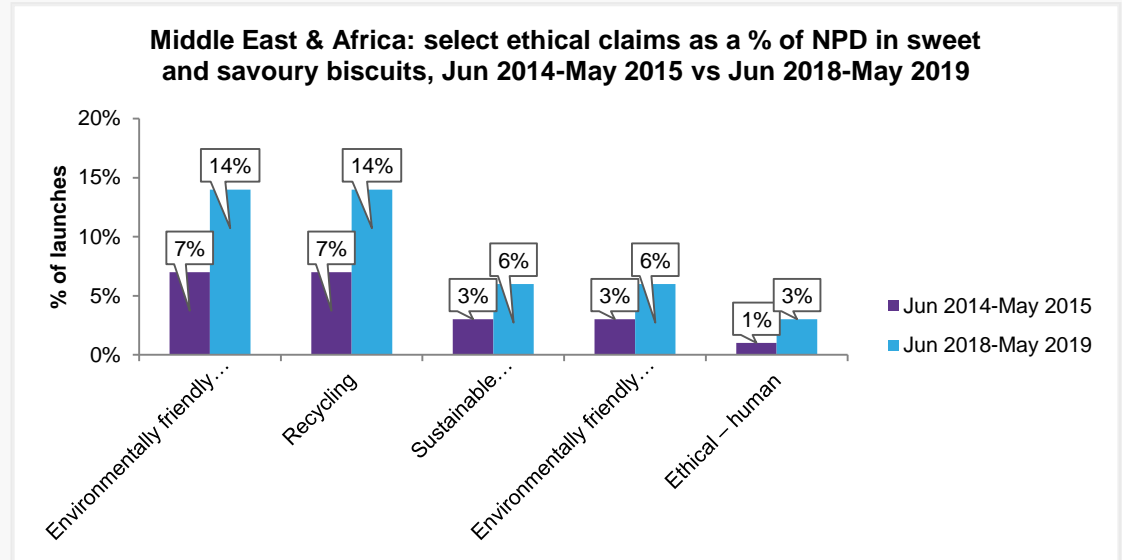
Superfoods

[Zephyr & Flore Superfood Mini Cookies with Chia Seeds and Blueberries](#) contains chia seeds, a natural source of omega 3 and are high in protein, fibres, vitamins, minerals and antioxidants (France).

Middle East & Africa (MEA)

Ethical claims are growing in MEA

Ethical and environmental claims in the region largely focus on recyclable packaging. However, there is also rising incidence of product launches featuring claims around **sustainability**, reflecting the wider consumer concern about environmental issues.

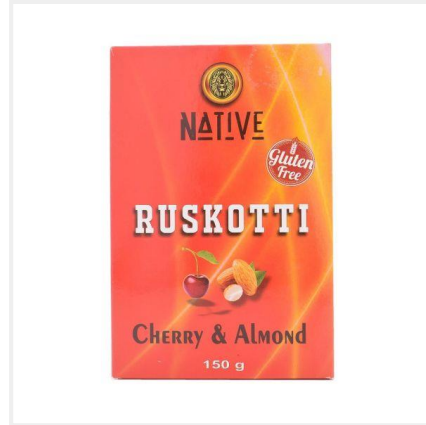


Recyclable packaging and ethical ingredient sourcing drive eco and ethical activity in MEA



Recyclable packaging

[Whole Grain Delight Cracker Biscuits](#) are premium, halal-certified, crispy and crunchy oven-baked grain crackers which claim to taste unique and delicious. The product retails in a recyclable pack (Nigeria).



Sustainable bee-keeping

[Native Cherry & Almond Gluten-Free Ruskotti](#) supports sustainable bee-keeping and uses honey sourced from trusted and experienced bee-keepers in the Cape Region of South Africa (South Africa).

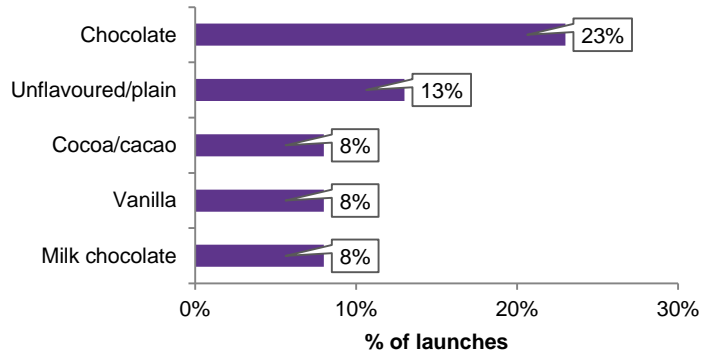


Locally produced and UTZ certified cocoa

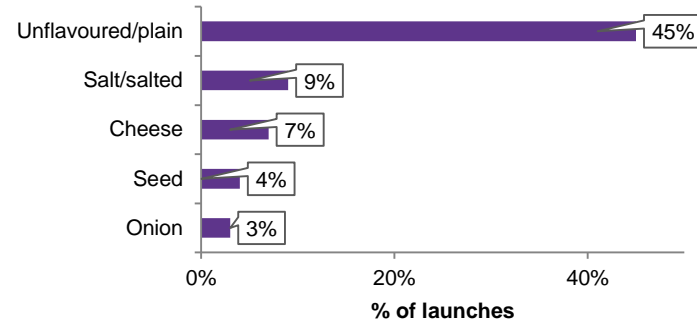
[Woolworths Food Duo of Florentine Biscuits](#) is a locally produced product made with UTZ-certified cocoa (South Africa).

Chocolate and plain flavours dominate sweet and savoury launch activity

Middle East & Africa: top five flavours as a % of NPD in sweet biscuits, Jun 2018-May 2019



Middle East & Africa: top five flavours as a % of NPD in savoury biscuits, Jun 2018-May 2019



Chocolate flavours see the most launch activity in sweet biscuits



Chocolate shortbread

[Henro My Scotties Chocolate Shortbread Biscuits](#) are free from trans fat. The halal product retails in a 185g recyclable and FSC-certified pack (South Africa).



Cocoa coated

[C.Kamara Cocoa Biscuit Filled with Marshmallow & Coated with Cocoa](#) is a premium quality product and retails in a pack containing one unit (Egypt).



Chocolate sandwich

[Merba Choco Delice Milk Chocolate Coated Sandwich Biscuits with Chocolate Flavoured Cream Filling](#) are kosher-certified and retail in a 176g pack containing eight 22g pieces (Israel).

Unflavoured and salted flavours lead savoury biscuit NPD



Salty Crackers

[Bisco Misr Salty Crackers](#) are free from synthetic colourings and preservative agents (Egypt).



Wheat Crackers

[Nutribix Wheat Crackers](#) are halal-certified, enriched with fibre and claim to be made with fine wheat (Nigeria).



Buttery notes

[Woolworths Food Original Snacker Biscuits](#) are lightly salted, flaky, crisp crackers with subtle buttery notes and are suitable for vegans (South Africa).

Appealing to the more health-conscious consumer



Superfood ingredients

[Prestige Wellness Sandwich Biscuits with Probiotic Cream](#) claim to be made using super ingredients including probiotic cultures, oat flakes and whole wheat flour and they contain no added sugar (UAE).



Reduced sugar

[Simple Truth Reduced Sugar Coconut Cookies](#) contain 32% less sugar than housebrand coconut cookies. They are high in fibre, contain no artificial colours, flavours, added preservatives, added sugar or salt (South Africa).



Guilt-free

[Mojo Me Almond & Fourseed Dunk'em Rusks](#) are described as indulgent, guilt-free almond and buttermilk rusks packed with superfoods and pumpkin seeds. They are free of added sugar, gluten, grain and artificial sweeteners (South Africa).

Biscuit launches from new GNPD countries



Tunisia
[Saïda Super Mini Extra Biscuits](#) are a limited edition pack of mini biscuits in a sharing pack.



Kenya
[Tropical Heat Chocolate Coated Rice Cakes](#) are suitable for vegetarians and provide less than 100 calories per unit. The halal-certified, chocolate-coated rice cakes are free from gluten and trans fat.



Lebanon
[Gandour Cookies Filled with Chocolate Cream](#) features 14 individually-wrapped cookies from Gandour & Sons, which was founded in Lebanon but has its headquarters in Jeddah, Saudi Arabia.

ASIA PACIFIC (APAC)



Read on [mintel.com](https://www.mintel.com)

The opportunities: APAC

1

Innovate with flavours and textures

Flavours which are **niche or unexpected**, such as spicy chicken wing, along with luxurious and exciting texture combinations drawing on inspiration from other snack categories, can excite consumers and drive sales.

2

Appeal to the health-conscious consumer

Brands can tap into the market for healthier biscuits by celebrating the nutrient content, along with **details about the nutrient sources**, eg from nuts, grains and seeds or through fortification.

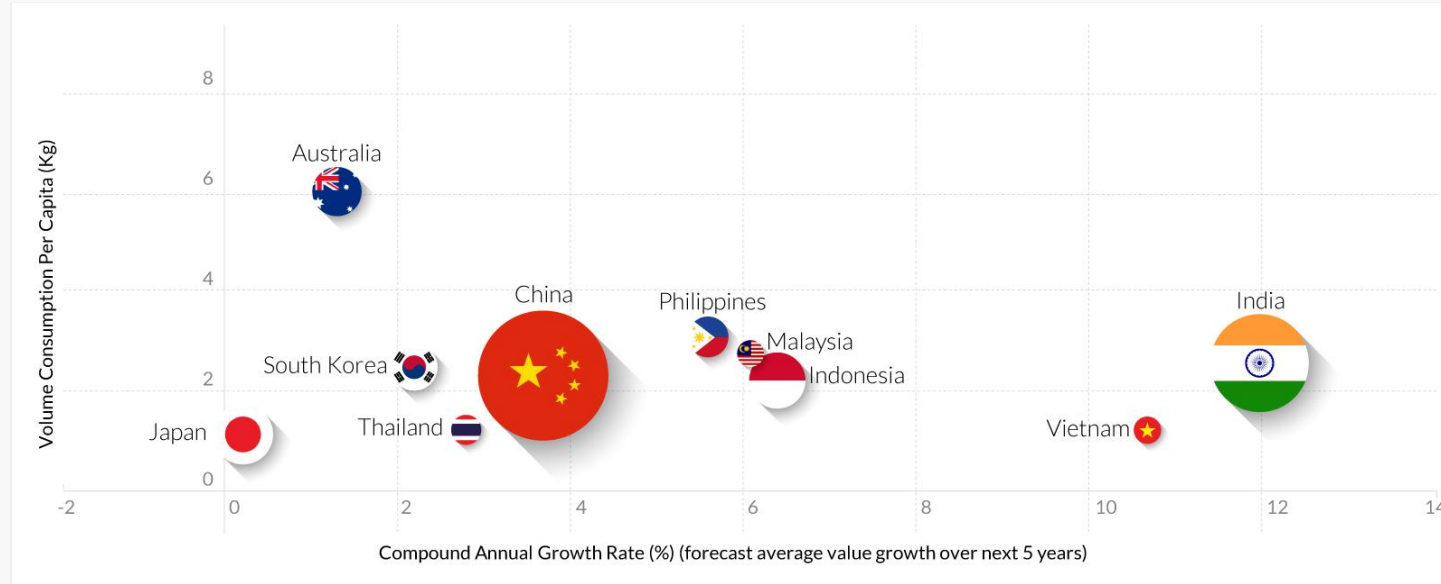
3

New eating occasions

Brands can draw inspiration from consumers' evolving consumption habits to suggest **new and fun ways of eating biscuits**, much like the Tim Tam Slam biscuit in Australia.

APAC retail market overview: biscuits, cookies and crackers, 2019

Australia has the highest per capita consumption in the region. India is an opportunity market and has the highest forecast value growth both in the region and globally.



Base: bubble size is based on market value (US\$ estimate 2019); CAGR is based on forecast market growth value over the next five years in local currency

Source: [Mintel Market Sizes](https://www.mintel.com)

APAC: cookies are all about the sensory experience

Multidimensional textures and intriguing flavours are appearing in biscuit innovation to cater to an audience which is eager to try new ideas.

Biscuits and crackers appeal as comforting snacks

SNACKING

69%

of adults in China who have eaten biscuits/crackers in the last six months have them as a [snack between meals at home](#)

COMFORT FOOD

46%

of biscuit/cracker consumers in China associate sweet biscuits as a [comfort food](#)

FLAVOUR VARIETY

46%

of sweet biscuit consumers in China associate them with a [variety of flavours](#), 37% for savoury biscuits

Base: 2,947 internet users aged 20-49 who have eaten biscuits or crackers in the last six months (November 2018)

Source: KuRunData/Mintel



Read on [mintel.com](https://www.mintel.com)

A variety of textures can enhance the eating experience



Crispy cookies with a lava chocolate cream
[Unico Lava Bites Double Choco Filling Cookies](#) are described as elegant crispy chocolate cookies with a soft filling lava chocolate cream made from Ghanaian cacao (Philippines).



Aromatic, rich and smooth yogurt filling
[FC Yogurt Crunch Original Yogurt Flavoured Sandwich Biscuits with Dietary Fibre](#) are made using selected wheat and feature an aromatic, rich and smooth yogurt filling with a wheat aroma (China).



Mellow and thick fruit jam
[Hei Mao Zi Black Cookies Mango and Cranberry Flavoured Black Cookies](#) contain natural mellow and thick fruit jam, and aromatic butter (China).

Unique and interesting flavours



Mugwort
[Eat's Better Mugwort Cracker](#) is oven-roasted, contains 4g of fibre and 5g of protein and is approved by the vegetarian society. Mugwort is an aromatic plant used as a herb and for medicinal purposes (South Korea).



Deliciously unexpected combination
[Fruits and Roots Apple & Oat Cookies with Carrot](#) are said to be soft baked cookies with a deliciously unexpected fruit and vegetable combination made with real fruit and vegetables (Australia).



Spicy chicken wing
[Oreo Spicy Chicken Wing Flavoured Sandwich Biscuits](#) are a limited edition product made with imported cocoa powder and spicy chicken-flavoured seasoning (China).

Arnott's creates a fusion of crackers and crisps (chips)



[Arnott's Cracker Chips](#) (Australia)

Arnott's Australia have launched a range of oven-roasted cracker chips (crisps) which are described as a unique **fusion of a cracker and a chip**. They are said to deliver a thin, crunchy flavour explosion with every bite.

The range has been launched with four flavours:

- Balsamic Vinegar & Sea Salt
- Sea Salt
- Honey Soy Chicken
- Sweet Chilli & Sour Cream

More healthful options appeal

WOULD PAY MORE FOR

56%

of adults in China would pay more for a biscuit that contains [ingredients which are good for health](#)

HEALTHFULNESS

40%

of cookie/biscuit consumers in China associate savoury cookies/biscuits with being [healthy](#), 27% for sweet cookies/biscuits

NUTRITION

32%

of cookie/biscuit consumers in China associate savoury cookies/biscuits with [containing more nutrition](#)

Base: 2,947 internet users aged 20-49 who have eaten biscuits or crackers in the last six months

Source: KuRunData/Mintel



Read on [mintel.com](https://www.mintel.com)

Highlighting natural ingredients



Natural ingredients

[Kru Yu VBoost Coconut Flavoured Gluten-Free Biscuits](#) are made with natural ingredients and have a rich flavour. They are a source of fibre, low in calories and free from artificial colours, flavours, preservatives and GMOs (Thailand).



Natural ingredients and flavours

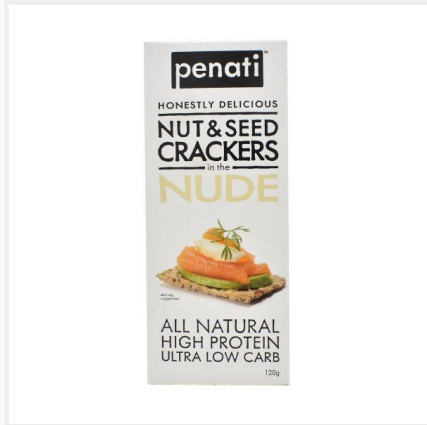
[The Natural Cracker Co. Sour Cream & Chives Crispy Crackers](#) are a 100% natural product made with real ingredients. They are free from GMOs, MSG and artificial colours, flavours and preservatives (Australia).



Five super seeds

[Health Paradise 5 Super Seeds Cookies](#) are said to be perfectly baked and contain only the finest organic ingredients (Malaysia).

Fortified protein and vitamin content can boost healthful perceptions



High protein

[Penati Nut & Seed Crackers in the Nude](#) are all-natural, high-protein and ultra-low carbohydrate crackers which are said to be 'honestly delicious' (New Zealand).



Fortified with CLA

[Eat Any Time Mindful Chocolate Flavoured 25g Protein Cookies](#) are said to improve muscle tone and help burn belly fat. They contain zero trans fat, are rich in protein and are fortified with CLA (Conjugated linoleic acid) (India).



Contains 10 vitamins

[Asahi Cream Genmai Bran Cheesecake Brownie Biscuits](#) are made with brown rice, wheat bran, honey and blueberries, and filled with lemon and cheese cream. The recipe contains 10 vitamins, added fibre and is fortified with calcium (Japan).

APAC: enhancing the cookie eating experience

Food and drink pairing and on-the-go formats can elevate the cookie consumption experience.

Serving suggestions can boost enjoyment



'Pile them up with yummy stuff'

[180 Degrees Created for Taste Mediterranean Flats Real Olives & Herbs](#) are described as authentic crisp breads which can be enjoyed with avocado, tomato, cheese or hummus (New Zealand).



With breakfast cereal or as an ice cream topping

[Mr. FronieZ Bron Chips Choco Chip Flavoured Thin Crispy Brownie Snack](#) has a crispy texture and is recommended to be consumed as a **daily snack**, with breakfast cereal, as an **ice cream topping**, or as part of a **dessert** (Indonesia).



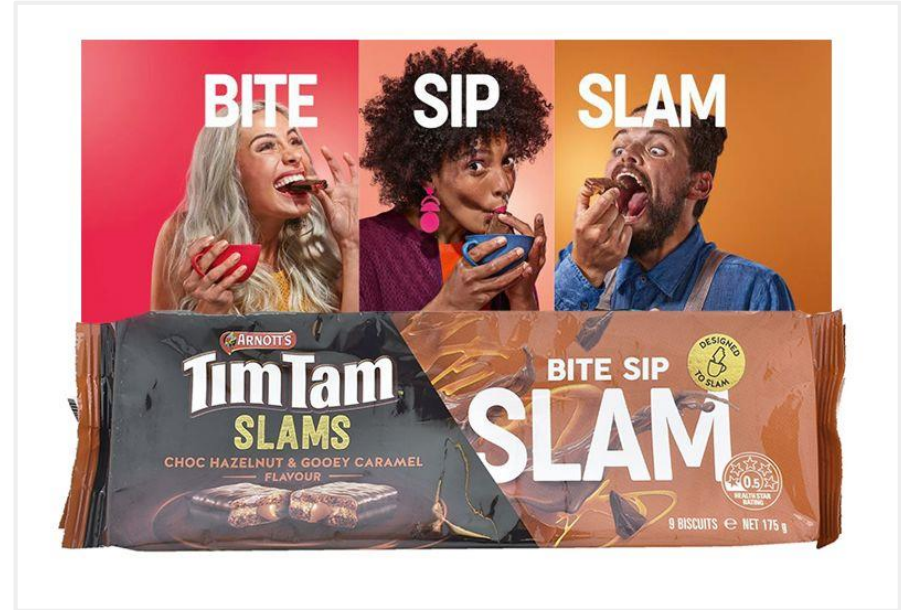
[Top with tomato ketchup, jam or chutney Kathiyawadi Mari Flavoured Dry Bhakhri](#) are said to be **ideal for breakfast** or **as a snack** with tea, coffee, curd, yogurt and pickles, or topped with ghee, tomato ketchup, jam or chutney (India).

Arnott's embraces the "Tim Tam Slam"

The Tim Tam Slam is popularly regarded as an Australian coffee break ritual involving the iconic Australian biscuit the Tim Tam, which is a chocolate-covered biscuit with a cream filling.

The 'slam' involves biting off both ends of the Tim Tam and sipping coffee or tea through the biscuit, before eating (slamming) the remainder of the biscuit.

The Tim Tam Slam range is said to be "designed for slamming" and is available in three varieties: [Choc Hazelnut & Goopy Caramel](#), [Choc Malt & Sticky Caramel](#), and [Dark Choc & Sticky Raspberry](#).



[Arnott's Tim Tam Slams](#) (Australia)

NORTH AMERICA



Read on [mintel.com](https://www.mintel.com)

The opportunities: The Americas

1

Enhance the impulse appeal

Innovating with **extra decadent fillings and toppings** along with unique and innovative flavours and formats can drive impulse purchase, and become the new pantry staples for consumers.

2

Novel ingredients are a point of difference

Novel ingredients such as insect protein and cauliflower flour have appeared in other food categories on the GNPD but are **relatively unexplored** in crackers and cookies. Such ingredients can appeal both on novelty and nutritional grounds.

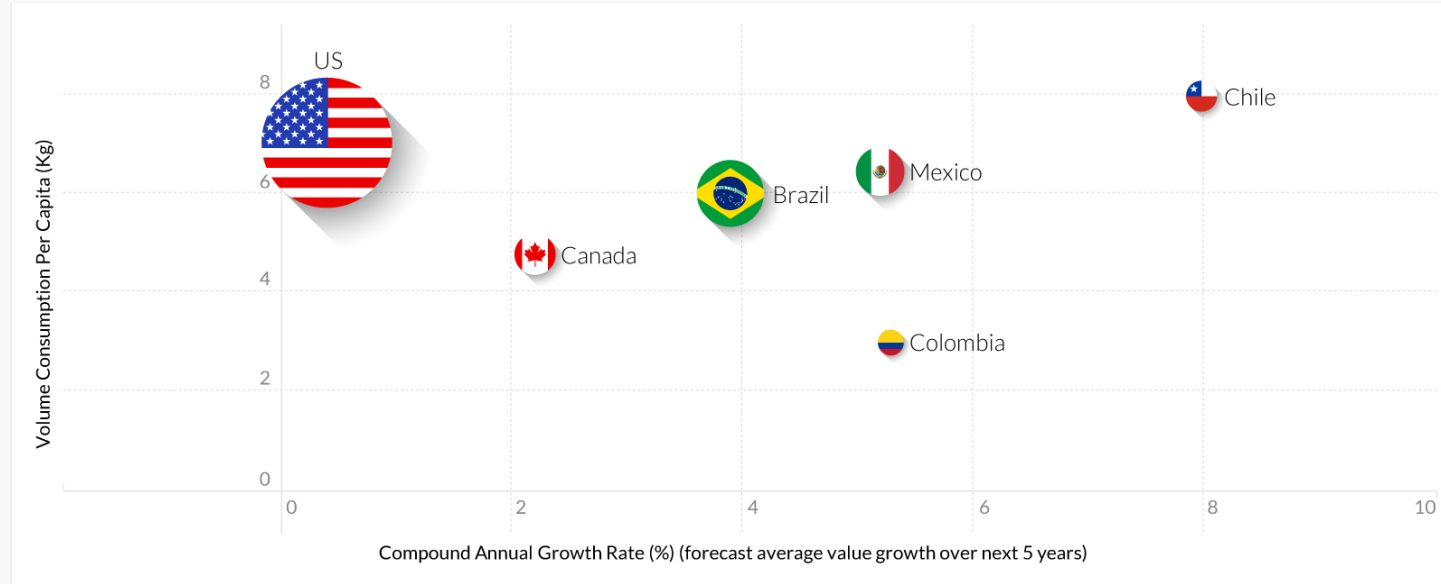
3

Vegan and vegetarian claims

Consumers' growing interest in vegan and vegetarian diets offers opportunities for biscuit brands to highlight these attributes on pack, especially as many sweet and savoury biscuits are **inherently vegetarian**.

Americas retail market overview: biscuits, cookies and crackers, 2019

Latin American countries are forecast for the strongest value growth, with Chile being the standout opportunity market.



Base: bubble size is based on market value (US\$ estimate 2019); CAGR is based on forecast market growth value over the next five years in local currency

Source: [Mintel Market Sizes](#)



Read on [mintel.com](#)

North America: innovate to win a coveted pantry spot

Indulgent flavours, novel formats and convenient packaging can intrigue consumers and drive impulse purchase.

Cookies are a popular treat and pantry staple

HIGH USAGE

72%

of adults in Canada have [eaten cookies](#) in the last three months

SATISFY A CRAVING

62%

of US adults snack to [satisfy a craving or to treat](#) themselves

PANTRY STAPLE

37%

of cookie consumers in the US [always have cookies](#) at hand in their household

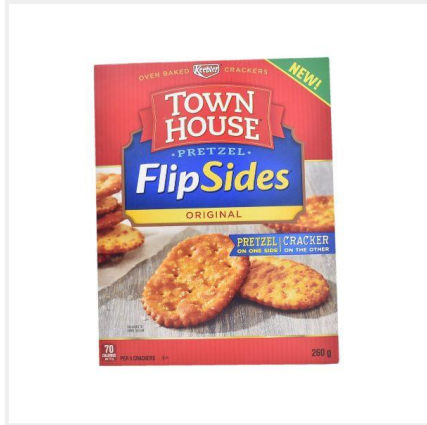
Base: Canada: 2,000 internet users aged 18+; US: 1,899 internet users aged 18+ who snack; 1,730 internet users aged 18+ who purchased packaged cookies in the last six months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Cookies and crackers are a pantry staple



Half pretzel, half cracker
[Keebler Town House Flip Sides Original Pretzel Crackers](#) are oven-baked and feature pretzel on one side and cracker on the other (Canada).



Bite-sized cookies
[Lenny & Larry's the Complete Crunchy Cookies Cinnamon Sugar Cookies](#) are bite-sized cookies made with plant-based proteins and do not contain GMO, egg, dairy, soy and sugar alcohol (US).



Burger-shaped cookies
[Bourbon Everyburger Burger-Shaped Chocolate Cookies](#) comprise crispy and crunchy cookies filled with chocolate to resemble a hamburger (US).

Nabisco ups the indulgence ante with extra deep fillings and luxurious coatings



"Most. Creme. Ever."

[Nabisco Oreo The Most Stuf Chocolate Sandwich Cookies](#) are limited edition Oreos which claim to have more cream than standard varieties (US).



Fudge-dipped cookies

[Nabisco Chips Ahoy! Original Fudge Dipped Thins Bites](#) are described as thin and crispy bite-sized cookies, dipped in fudge (US).



Fudge-covered

[Nabisco Nutter Butter Fudge Covered Peanut Butter Sandwich Cookies](#) are made with real peanut butter (US).

Consumers are looking for portable and convenient cookies and crackers

In the US, **45%** of cookie consumers eat them while [on the go](#) and **34%** look for cookies which are [packaged in a convenient format](#).



Individually packed

[Olyra Fig Anise Ancient Greek Grains Breakfast Biscuits](#) contains all natural ingredients and grains, and can be enjoyed on the go or as part of a balanced breakfast (US).



Handy tub pack

[Famous Amos Bite Size Chocolate Chip Cookies](#) are described as perfect munchable cookies, and said to be ideal for easy snacking in the car or on the run (US).



Resealable pack

[H-E-B Select Ingredients The Cowboy Cookie](#) are made with pecans, oats and chocolate chips; ingredients inspired by an old cowboy recipe, according to the packaging (US).

Base: 1,780 internet users aged 18+ who purchased any cookies in the last six months; 1,730 internet users aged 18+ who purchased packaged cookies in the last six months

Source: Lightspeed/Mintel



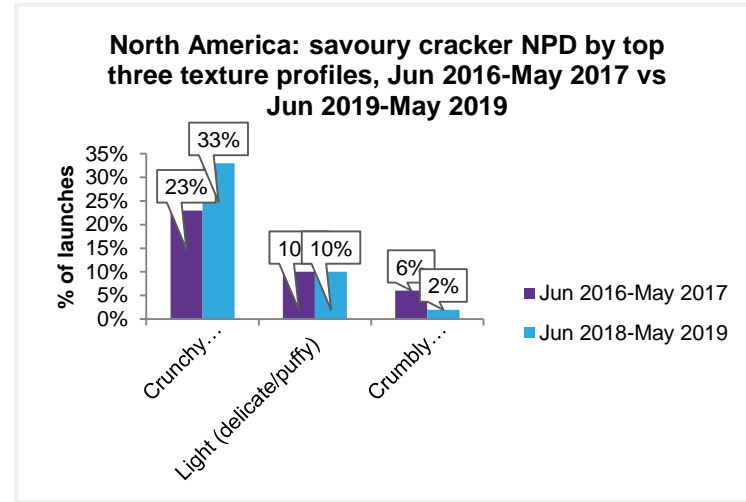
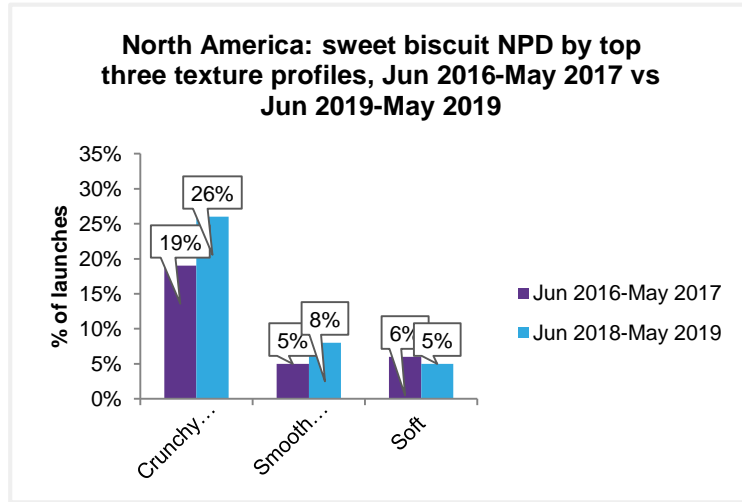
Read on [mintel.com](https://www.mintel.com)

North America: textures and natural ingredients

Crunchy and crispy biscuits and natural claims all see growth.

Crispy and crunchy biscuits see the most launch activity

In the US, **34%** of cookie consumers are looking for a cookie with a [soft texture](#), and **22%** seek a crunchy texture.



Base: 1,780 internet users aged 18+ who purchased any cookies in the last six months (May 2017)

Source: Lightspeed/Mintel; [Mintel GNPD](#)



Read on [mintel.com](#)

Thin and crispy launches abound



Slimmer and crispier cousin of Joe-Joe
[Trader Joe's Chocolate & Vanilla Joe-Joe's Slims](#) are chocolate and vanilla-flavoured creme cookies and are described as the slimmer and crispier cousin of the Joe-Joe cookie (US).

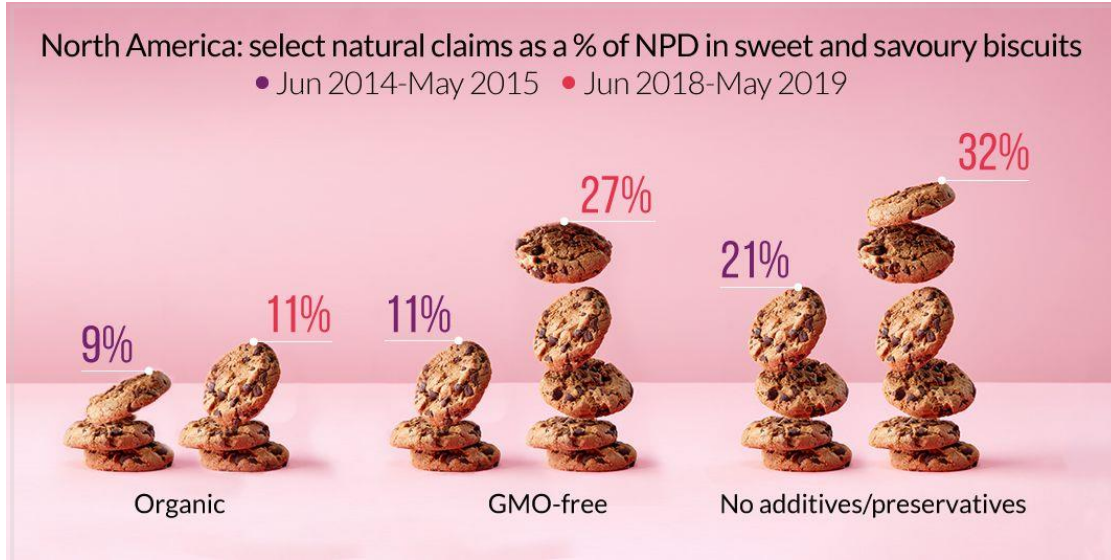


Crispacious
[Pop-Tarts Crisps Frosted Brown Sugar Cinnamazing Crisps](#) are said to be a light, crisp layer of Pop-Tarts pastry filled with brown sugar cinnamon filling and topped with icing. Also available in a [Strawberrylicious](#) flavour (US)



Deliciously thin
[34° Vanilla Sweet Crisps](#) are described as deliciously thin and irresistibly snackable. It is said to be sweet like a cookie and crisp like a cracker (US)

Consumers are looking for more natural ingredients



Natural products are evolving in more 'clean label' products, emphasising free-from claims, minimal processing and simple ingredient statements without artificial ingredients.

In the US, **27%** of [snack consumers](#) look for snacks with **all-natural ingredients**, and **13%** for **organic ingredients**.

Base: 1,899 internet users aged 18+ who snack

Source: [Mintel GNPD](#)



Read on [mintel.com](#)

Local sourcing, minimal ingredients and processing



Five simple ingredients

[Sejoyia Coco-Thins Salted Caramel Snackable Cashew Cookies](#) are made using five simple ingredients including coconut, sea salt, cassava flour, cashews and coconut sugar (Canada).



Locally sourced ingredients

[The Organic Pantry Co Turmeric Flaxseed Crackers](#) are made with all-organic ingredients sourced from within California from local importers with impeccable reputations for quality (US).



Minimally processed

[Go Raw Organic Lemon Pie Sprouted Cookie Crisps](#) are a minimally processed plant-based and raw-energy superfood made with naturally sweet, organic and simple whole ingredients (US).

North America: cauliflowers and crickets feature in recipes

Brands are innovating with niche and novel ingredients to boost nutritional appeal.

Cauliflower flour crackers emphasise plant-based ingredients

Caulipower in the US has achieved success with their range of [cauliflower flour-based pizzas](#) and more recently have launched several cauliflower flour-based baking mixes.

From The Ground Up is hoping to tap into the success of Caulipower with their launch of a range of [cauliflower flour-based crackers](#). The crackers are said to be a source of vitamins from vegetables, are free from GMO and gluten, and are vegan-friendly.



[From The Ground Up Cauliflower Sea Salt Crackers \(US\)](#)

Insects crawl into the crackers category



[Crickstart Crackers](#) (Canada)

While insects feature on the menu in many countries all over the world, they are a relatively new and extremely niche food for most consumers in the US and other Western markets.

Crickstart crackers are available in olive and chilli flavours and are said to feature **25 crickets per serving**. They are an organic product containing a good source of vitamin B12, protein, fibre and omega 3.

Within the food category on the GNPD, insect and invertebrates as ingredients are exceptionally niche, but in the last 12 months to May 2019, there has been a [notable uptick in launch activity](#). The snacks category – primarily in the form of energy and protein bars – see the bulk of launch activity ([53% of NPD in the 12 months to May 2019](#)), along with the bakery category (25% of NPD).

Vegan and vegetarian claims are rising

Biscuits and crackers by their composition are likely to be vegetarian or even vegan-friendly. Due to growing consumer interest in these animal ingredient-free dietary choices, brands are increasing signposting these claims on pack.

Although NPD remains fairly niche – at 12% for vegan biscuit and crackers, and 6% for vegetarian in the 12 months to May 2019 – **vegetarian and vegan claims have seen a healthy increase** in the five years to May 2019.

VEGAN AND VEGETARIAN

5

[percentage point growth in vegan and vegetarian](#) claims as a % of NPD in biscuits and crackers in the five years to May 2019

Vegan and vegetarian claims are growing in prevalence



Rice and coconut rolls

[Gia Naturals Thai Jasmine Rice Coconut Crispy Rolls](#) are 100% natural, made with real coconut milk and **no eggs**, and is suitable for both vegetarians and vegans (Canada).



Vegan Snickerdoodle cookies

[Red Plate Foods Snickerdoodle Cookies](#) is an allergy-friendly, **vegan** product which is free from wheat, gluten, egg, dairy, soy, peanuts, tree nuts, sesame, fish, shellfish and GMO (US).



Upcycled banana

[Barnana Dark Chocolate Organic Crunchy Banana Brittle](#) is made from **upcycled bananas** and is free from gluten and GMO. This USDA Organic and kosher-certified product is said to be rich, dark and sweet, and is suitable for vegans (US).

Latin America: biscuits innovate around textures, flavours and health attributes

Biscuits appeal on flavour and indulgence, but innovation must be mindful of consumer health concerns.

Cookies and crackers appeal as an indulgent snack

AS A SNACK

67%

of adults in Brazil have a [savoury biscuit](#) as a snack, 63% a sweet biscuit

MULTI-DIMENSIONAL TEXTURE

37%

of adults in Brazil are looking for a cookie/cracker with [multi-dimensional texture](#)

Base: 1,500 internet users aged 16+ (November 2018-December 2018); 1,422 internet users aged 16+ who have eaten cookies and/or crackers in the last three months (Dec 2018)

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Multi-dimensional textures appeal



Crispy and crunchy with rich chocolate
[Mikaela's Simply Divine Chocolate Brownie Biscotti Cookies](#) combines Belgian dark and milk chocolate chips for a decadent richness and are claimed to be both crispy and crunchy (Guatemala).



Crunchy outside and soft inside
[Honeymoon Soft Double Chocolate Cookies](#) are microwavable and said to be crunchy on the outside and soft on the inside (Brazil).



Mega crunchy
[Barion Tubetes Snack Wafer Rolls Filled with Strawberry Cream](#) feature a mega crunchy tube and a strawberry cream filling (Brazil).

Novel and niche flavours can drive interest



Only soursop flavoured biscuit on the GNPD

[Italo Soursop Flavored Wafers](#) are artificially flavoured. Soursop is a tree native to the tropical regions of the Americas and the fruit has a flavour described as a combination of mango and pineapple (Puerto Rico).



Guava

[Seu Divino Premium Casadinho Guava Biscuits](#) contains nature-identical flavourings and are free from gluten, soy and milk (Brazil).



Quinoa and leek

[Nestlé Nesfit Wholegrain Salted Crackers with Quinoa and Leek](#) contains wholegrain cereal and claims to provide nutritious energy. It contains quinoa, which has B-complex vitamins and is a source of protein (Brazil).

Sugar and sodium are on the consumer radar when buying snacks

SALT

23%

of snack consumers in Brazil consider the [salt content](#) of snacks they are buying

SUGAR

21%

of snack consumers in Brazil consider the [sugar content](#) of the snacks they are buying

PORTION CONTROL

22%

of cookie and cracker consumers in Brazil think thin versions of cookies and crackers can [help control the intake of salt and sugar](#)

Base: 1,439 internet users aged 16+ who have eaten snacks in the last three months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Addressing sugar and salt concerns



Sweetened with Stevia
[La Orejita Mini Chocolate Chip and Orange Cookies](#) are artisanal cookies which have been sweetened with stevia and are free of sugar (Costa Rica).



Relaunched with a low sodium formulation
[eQlibri Original Flavored Multigrain Biscuits](#) have been relaunched with a new low-sodium formulation which is 28% lower sodium than similar products (Brazil).



With tagatose, a type of natural sugar
[Terrium Orange and Ginger Bio-Sweetened Cookies](#) feature a new formulation with less calories and more fibre. The product is sweetened with natural stevia, tagatose and orange peel (Chile).

Thin and mini formats can aid in portion control



12 calories per cookie

[Alquimia Viva Whole Rice and Chia Mini Cookies](#) features authentic semi-bitter chocolate and are a natural source of fibre. They feature only 12 calories per cookie and retail in 10 x 25g individual packs (Mexico).



99kcal per portion

[Mini Classic White Chocolate Coated Sandwich Biscuits with a Dulce de Leche Filling](#) feature 99kcal per portion, and retail in a 125g pack (Argentina).



16 calories per portion

[Real Natural Organics Organic Multigrain Quinoa Rice Thins](#) feature 16 calories per portion, are 100% natural and free from artificial preservatives and added sugar, and are also high in fibre (Mexico).

Latin America: artisanal production and snacking occasions

Brands can boost the premium appeal of biscuits with more artisanal cues.

Handmade and artisanal production cues can elevate the premium credentials of biscuits

HANDMADE

39%

of cookie and cracker consumers in
Brazil associate [handmade with
higher quality](#)

Although making production more "handmade" is not a cost-efficient option for large manufacturers, some artisanal techniques can potentially be incorporated as a way of enhancing the quality perception of biscuits. For example, in bakery, [hand-topped](#) ingredients are emerging to convey a higher production quality. Describing the cookie/biscuit as artisanal, handmade or crafted can imbue a sense of higher quality and care.

Base: 1,422 internet users aged 16+ who have eaten cookies and/or crackers in the last three months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

Handmade and artisanal production can signify a more premium product



Small batches

[Casa Bauducco Traditional Flavored Cookie](#) is an artisanal vanilla-flavoured product with milk chocolate chips, and is said to be made in small batches with real ingredients (Brazil).



Craft-made

[Hecho a Mano Como Antaño Chocolate-Oat Cookies](#) are said to be made by the hands of Mexican women through an artisanal process using ingredients such as creamy butter, sugar, egg and flour of the highest quality (Mexico).



Artisanal

[Zé Pereira & Maria Amédoa Lemon Handcrafted Biscuit](#) are artisanal biscuits described as thin and crunchy with a touch of lemon (Brazil).

Topping sachet adds personalisation to rice crackers

Mexico's Okko Superfoods has launched a range of rice cakes featuring quinoa with an included sachet of topping. The rice cakes feature puffed rice and quinoa, which the manufacturer claims are natural sources of vitamins and minerals.

The product is available with a honey sachet and a cocoa flavour, which is a mixture of cocoa powder and mesquite blossom honey.

Including a flavoured topping can appeal to the **20%** of adults in Brazil who say they would be interested in cookies or crackers which come with a [topping on the side](#).



[Okko Super Foods](#) (Mexico)

Base: 1,500 internet users aged 16+

Source: Lightspeed/Mintel

Opportunities for more breakfast cookies and crackers in South America



[Belvita Breakfast Sandwich Strawberry Yogurt Creme Breakfast Sandwich Biscuits](#) (Puerto Rico)

Cookies and crackers are well established as part of the morning ritual in Brazil, with **62%** of cookie and cracker consumers having consumed them [as part of a breakfast](#).

Highlighting long-lasting energy and high-fibre content can resonate with consumers who are looking for a quick, convenient and nutritious start to their morning.

Belvita Breakfast Sandwiches are said to provide **four hours of nutritious, steady energy** and contain 15g of whole grains per serving.

Base: 1,422 internet users aged 16+ who have eaten cookies and/or crackers in the last three months (December 2018)

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

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