THE FOURTH ANNUAL

STATE OF SNACKING

2022 GLOBAL CONSUMER TRENDS STUDY BY:

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A MESSAGE FROM OUR CEO

CEO and Chairman
Dirk Van de Put

At Mondelēz International, we take 'snacking made right' to heart. We're constantly thinking about what consumers want and need from their snacks. It's an obsession we're proud of, because it keeps you – the consumer – at the center of all we do.

Our fourth annual State of Snacking report builds upon our extensive insights into the many facets of snacking in daily life today, along with the trends shaping the future of snacking. This annual survey, conducted in partnership with The Harris Poll, helps us keep pace with current snacking attitudes and behaviors around the world and, importantly, anticipate and plan for future consumer trends.

To this end, we surveyed thousands of consumers across 12 countries and analyzed results by generation. These insights help us stay close to our consumers and allow us to live by our purpose, which is to empower our consumers to snack right, all around the world.

This year challenged our consumers and our business with new hurdles, from inflation and ongoing supply chain issues to the tragic war in Ukraine. Snacking continues to meet a growing range of needs across consumers' lives, with indulgence remaining a welcome part of a balanced lifestyle. In fact, three in four consumers across the world (78%) attest **"these days, it's more important than ever to have moments of indulgence in the day."** Consumers continue to turn to snacking as an accessible, affordable treat to ease or reward the demands of daily life. Despite rising grocery costs, three-quarters (75%) of consumers agree they always find room in their budget for snacks, especially millennials (80%).

DAILY SNACKING HABITS

Snacking remains a daily staple, with 71% of consumers around the world snacking **at least twice a day.** As we've seen in years past, consumers are increasingly **replacing meals with snacks.** Over half (55%) of households make a meal out of snacks weekly, enjoying lots of small plates, rather than one big entrée. This is especially true for those in Asia Pacific (64%).

MINDFUL SNACKING

As consumers continue to prioritize snacking in daily life, we also see consumers making an effort to be more mindful and present while snacking. 78% report **taking more time to savor indulgent snacks.** Many are also tuning into portion sizes, saying they take time to **portion out snacks** before eating them (61%) and **checking nutrition labels** on snacks before buying them (68%).

A WAY TO CONNECT

In addition to helping keep us energized or providing a moment of bliss, snacks offer important ways to connect with colleagues, friends and family. Nearly eight in 10 (79%) agree they **snack to connect with others,** while seven in 10 (71%) believe **"sharing snacks with others is my love language."** This trend is particularly strong in India (88%) and Mexico (86%), where households sit down to enjoy a snack together on a weekly basis.

ONLINE DISCOVERY AND PERSONALIZATION

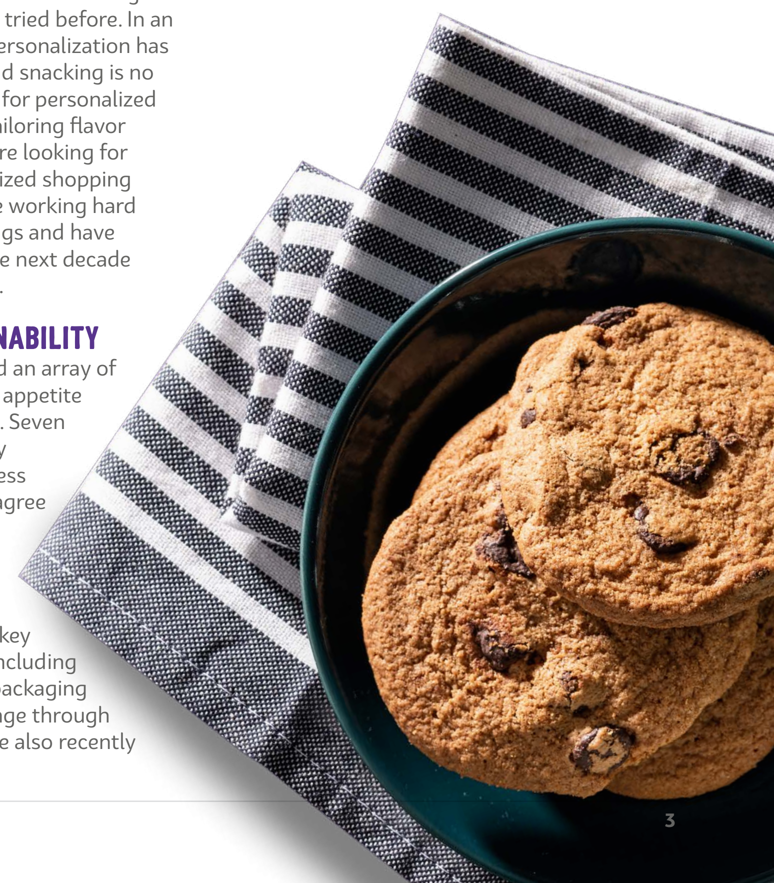
Consumers are passionate about their favorite snacks and are always looking for the latest and greatest offerings. Consumers believe that social media is especially useful for finding new snacks they have never tried before. In an increasingly digital world, personalization has become an expectation – and snacking is no exception. Whether looking for personalized snacks to give as a gift, or tailoring flavor preferences, six in 10 (61%) are looking for snacks that offer a personalized shopping experience. That's why we're working hard to expand our digital offerings and have committed $1 billion over the next decade towards digital investments.

APPETITE FOR SUSTAINABILITY

Beyond delicious flavors and an array of choices, consumers have an appetite for more sustainable snacks. Seven in 10 consumers believe they prioritize snacks that have less plastic packaging, and 72% agree they typically recycle snack packaging. We understand these consumer needs, and we're working hard to do our part to help address key environmental challenges, including striving for net zero waste packaging and combating climate change through science-based targets. We've also recently announced the next phase of our Cocoa Life program for a total $1 billion investment through 2030. With this investment, we aim to catalyze ground-breaking sector collaboration to help address systemic environmental and human rights challenges.

The findings of this report, in combination with our robust, proprietary snacking insights and knowledge estate, help inform our strategy – so that, in turn, Mondelēz International can continue to deliver on consumers' evolving preferences and become the global leader in snacking. I encourage you to grab a snack and read on!

Dirk



KEY INSIGHTS

TASTE OF OUR TIMES

89%

of consumers are concerned about inflation and six in 10 (60%) are worried about availability of their favorite snack foods in stores.

75%

of consumers report prices of foods to make meals hurting their pocketbooks more than snacks, saying, "I always find room in my budget for snacks."

↑

Consumers are increasingly replacing meals with snacks, reporting higher likelihood to do so across all three standard mealtimes.

SNACK CURATION

84%

of consumers feel that "snacks should meet different nutritional needs for different consumers."

61%

will go out of their way to find their favorite snack, and 63% would pay extra to bring back some of their favorite childhood snack brands.

67%

would rather buy fewer amounts of their favorite snack brand than buy the generic alternative, even if it's less expensive.

MINDFUL SNACKING

78%

are more likely to take time to savor indulgent snacks.

61%

take time to portion out snacks before eating them.

68%

check nutrition labels on snacks before buying them.

APPETITE FOR SUSTAINABILITY

69%

believe that "sustainable packaging helps me enjoy my snack more" with 82% wishing that more snacks had biodegradable packaging.

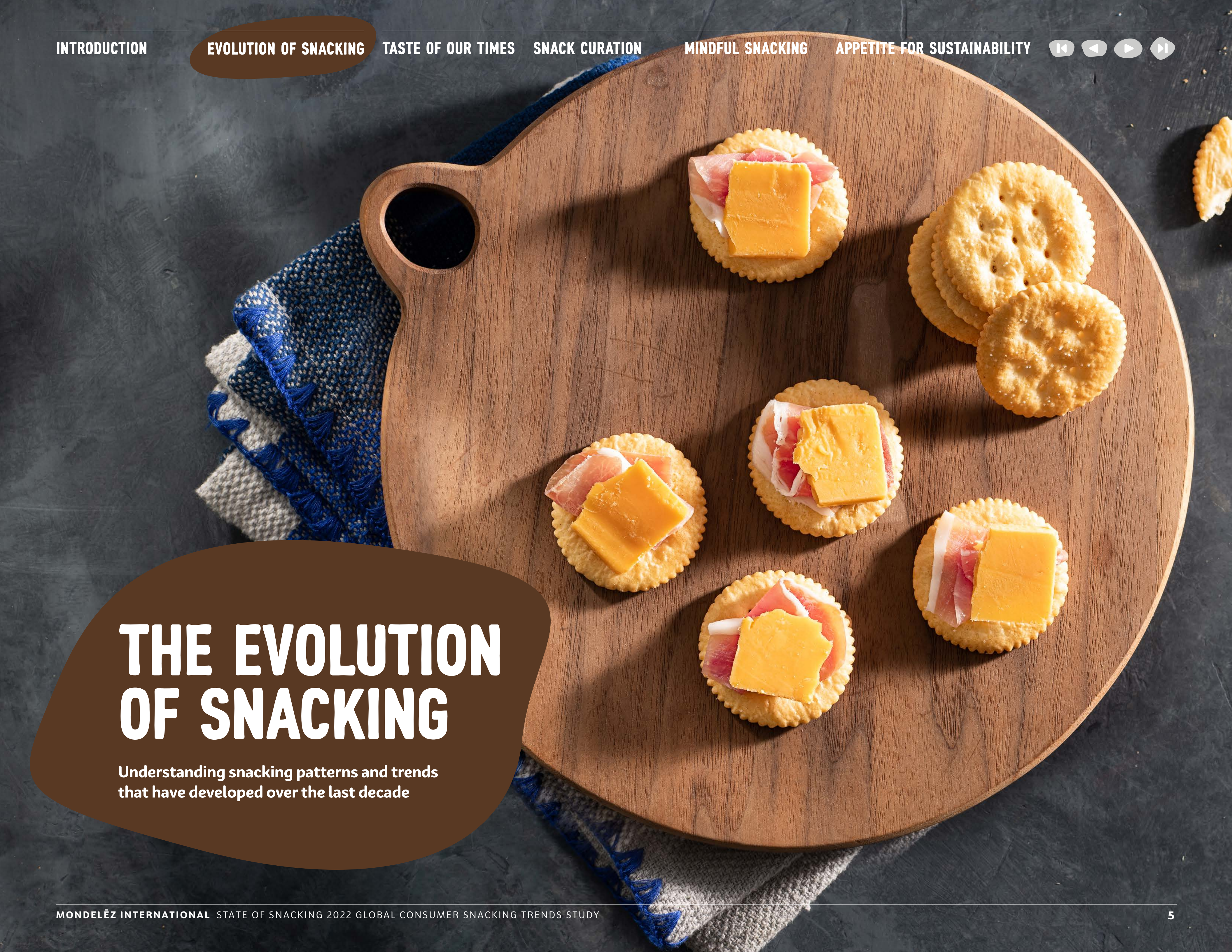
64%

will pay more for snacks that are better for the environment, and 65% would pay more for snacks that contain ethically sourced ingredients.

70%

believe that "plant-based snacks are better for the future of our planet."

Read more about our findings.



THE EVOLUTION OF SNACKING

Understanding snacking patterns and trends that have developed over the last decade

A DECADE OF SNACKING TRENDS

HOW THE WORLD SNACKS

In 2021 after a year of global pandemic, a world-wide study was launched to learn about and compare the different snacking patterns around the world and explore the role of snacking in consumers' lives and how behaviors have changed between 2013 and 2021. Highlights of the study are featured throughout this report, and you can read the full findings here.

64%

of consumers say they prefer to eat many small meals throughout the day, as opposed to a few large ones.

EVOLUTION OF SNACKING

Since 2013, the number of consumers who eat snacks and the number of snacks per capita have grown significantly. Changes in eating habits and customs, more time spent at home post-pandemic, reduced mobility, increased importance of convenience in the work-from-home set-up, the need to reduce anxiety and the greater supply available at home may have facilitated this market increase.

Morning snacks consumption (from 6 a.m. to 10 a.m.) has grown 42%. The increase in snacks consumption can be largely explained by the snacks consumed before 11 a.m. In 2021 there was higher snack consumption in the early hours of the morning. With a significant increase in main meal skipping, it is important to note that 40% of consumers said they “skipped at least one main meal yesterday” in 2021 vs. 30% in 2013, with breakfast being the most skipped.

Members of Gen Z (those aged 16 to 24 years) along with slightly older millennials (25- to 34-year-olds), and specifically women within those demographics drive snacking growth.

6%

increase in number of food snacks* consumed per day.

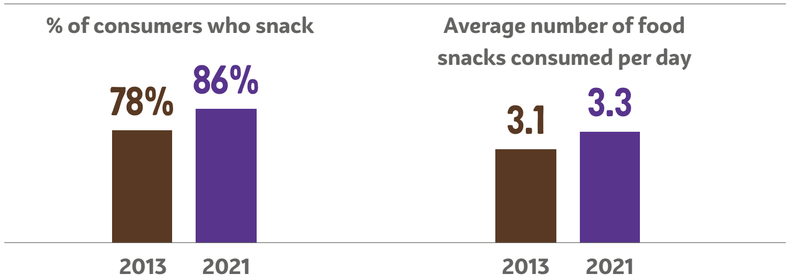
10%

growth of snacks in snacking population.

PERCENTAGE OF GROWTH IN MORNING AND AFTERNOON SNACKING IN 2021**

42%	22%
MORNING SNACKING	AFTERNOON SNACKING
6 a.m. to 10 a.m.	12 p.m. to 3 p.m.

SNACKS CONSUMED



*A snack is everything we eat or chew either between main meals or to replace those meals.
**Growth indicates the increase in number of snacks during stated time frames
Survey data and statistics are sourced from the 2021 How the World Snacks report. Find out more here.

THE OREO STORY

2022 marked the 110th anniversary of milk's favorite cookie. Here are some ways the brand stays close to what consumers want by innovating with new flavors and forms and staying on trend with partnerships and inclusive marketing programs.

UNIQUE FLAVORS & LIMITED EDITION OFFERINGS

No matter what country OREO fans reside, the brand is actively revealing surprising and delicious local flavors – including blueberry, green tea ice cream, spicy chicken, dulce de leche and maple syrup. Going above and beyond, OREO keeps the intrigue for new flavors at its peak with Limited Edition unveilings. Over the years, consumers have eagerly anticipated Limited Edition offerings on the shelf to include Snickerdoodle, Brookie-O Brownie, and seasonal favorites like festive Halloween and Winter cookies.

NEW SNACK FORMS

After leaving store shelves a decade ago, OREO Cakesters made their triumphant return to store shelves. OREO Cakesters take the favorite flavor consumers know and love in a reimagined soft, fluffy form. Cakesters meet consumers' growing desire to embrace the nostalgia of past beloved snack foods.

MORE DIETARY AND MINDFUL SNACKING CHOICES

Consumers seek different snacks to meet their own nutritional needs, along with their desire for more mindful portions. Gluten Free OREO and OREO Thins help us meet our consumers' diverse preferences.

PLAYING ALONG WITH POP CULTURE

The blending of the world's favorite cookie with other icons in pop culture is another creative way OREO continues to stay center stage. OREO brought a playful twist to The Batman Movie with a special OREO Batman cookie launched across 60+ markets in 2022.

OREO & PRIDE

Consumers have an increased desire to buy from a company that shares their commitment to key causes. The brand partnered with PFLAG to develop a program that spotlights the importance of peer support and advocacy to LGBTQ+ people and allies. OREO also partnered with the National Center for Transgender Equality (NCTE) for a grassroots activation to gift complimentary special-edition OREO Pride Packs, pins and stickers to celebrate everyone's unique identities. The three-pack designs emphasize the importance of gender expression, inspired by three colors of the transgender flag (pink, blue and white) and highlighting that gender is a spectrum and a journey one takes to discover, embrace and share their identity. There is even a space on the package to write your own words of affirmation to share with your LGBTQ+ loved one.

TASTE OF OUR TIMES

How a tumultuous economy affects consumers around the world

TURBULENT TIMES DRIVE SNACKING

As inflation continues to squeeze household budgets across the globe, it's clear that the economic climate is impacting food choices, as **nine in 10 (89%) consumers around the world are concerned about inflation.** A strong majority (82%) are more budget conscious than they were a year ago, especially moms (87%), with **over half of consumers (56%) reporting that they're paying more for groceries compared to this time last year.** Interestingly, consumers are most likely to report they are spending more on produce and fresh foods (56%), than snack foods (44%).

Remarkably, snacks remain essential as three-quarters (75%) report they always find room in their budget for snacks, especially millennials (80%). **Two-thirds of consumers (64%) agree, "in tough times, snacks are the one thing I can count on" (73% millennials and 69% Gen Z)**, while six in 10 (60%) believe snacking helps them take their mind off the issues of the world (millenials 71%, Gen Z 69%) – the same percentage who agreed with this statement during the height of the pandemic.

In addition to rising prices, supply chain issues also appear to be a concern. More than half (51%) of consumers around the world have experienced a shortage or delay in receiving snacks in the last year, especially those in India (75%), China (62%), and U.S. (57%), and six in 10 (60%) are concerned about availability of their favorite snack foods in stores. Consumers report that wheat (53%) and cocoa (52%) products are particularly harder to find compared to this time last year.

On the bright side, these shortages are inspiring a wave of creativity and gratitude. **Six in 10 (60%) report supply chain issues have caused them to be more open to trying new snacks, especially Gen Z (71%) and millennials (69%)**, while seven in 10 consumers (71%) believe it has made them appreciate their favorite foods more, particularly those in Asia Pacific (79%) and Latin America (78%). Consumers also report having more faith in large brands to carry them through this time, with three-quarters (76%) believing, "bigger brands are better equipped to deliver during challenging times."

PERCENTAGE PAYING MORE COMPARED TO THIS TIME LAST YEAR

56% produce and fresh foods + groceries

VS

44% snack foods

WHEAT OR FLOUR PRODUCTS WERE ESPECIALLY HARD TO FIND IN:

India	70%
Indonesia	62%
Mexico	61%

COCOA OR CHOCOLATE PRODUCTS WERE SCARCER IN:

India	73%
Brazil	64%

67%

agree that "I am more open to using coupons when shopping for snacks than I was a year ago."

(75% Gen Z, 74% millennials, 74% Asia Pacific)

THE DAILY STAPLE

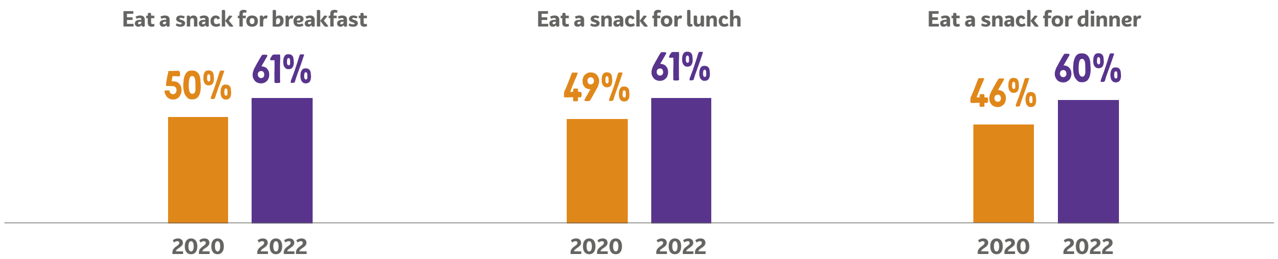
Snacking is a daily staple as 71% of consumers around the world snack at least twice a day. **Consumers are increasingly replacing meals with snacks, reporting higher likelihood to eat a snack across all three standard mealtimes.** Over half (55%) report their households make a meal out of snacks at least weekly, enjoying lots of small plates, rather than one big entrée, especially those in Asia Pacific (64%) .

Early morning snacking is also on the rise, as 24% of consumers (and 29% of Gen Z) now agree they eat a snack before breakfast, up from 19% in 2020. This trend is particularly evident in Asia Pacific (31%), where India (42%) and Indonesia (34%) track especially high. Convenience is a motivator for this choice, as two-thirds (65%) believe it's easier to grab a quick snack in the morning than a full meal.

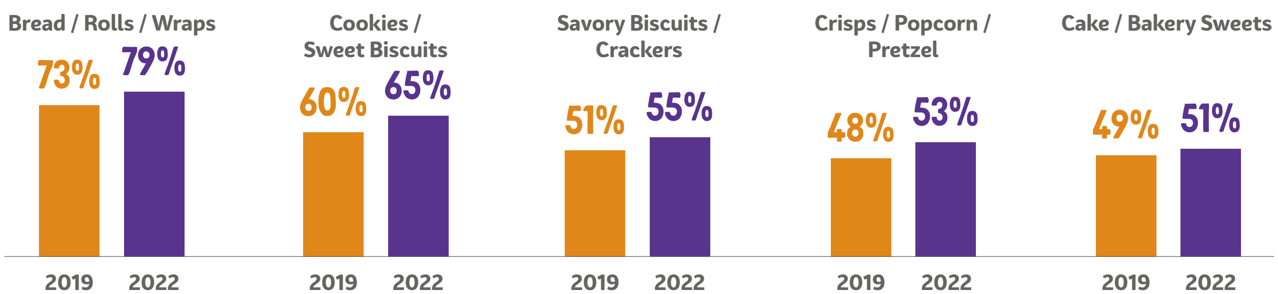
Snacking also offers routine moments of togetherness. Eight in 10 (79%) snack to connect with others with **seven in 10 (71%) believing, "sharing snacks with others is my love language,"** a statement that millennials particularly resonate with (79%). Seven in 10 consumers (68%) agree their household sits down to enjoy a snack together at least on a weekly basis, especially in India (88%) and Mexico (86%).

What are the consumers snacking on these days? When it comes to the most popular snack category, biscuits clearly rise to the top. From sweet to savory, consumers are more likely to report eating these types of snacks weekly or more, compared to the prior years.

SNACKING AS MEAL REPLACEMENT ON THE RISE THROUGHOUT THE DAY



% WHO EAT SNACK WEEKLY OR MORE



SNACK CURATION

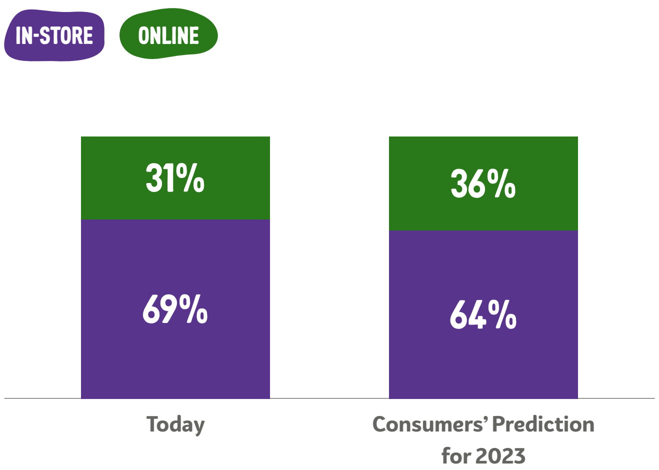
Any time is snack time, as consumers crave multiple sources of inspiration and ways to find their favorite brands

SNACK DISCOVERY, THE DIGITAL WAY

Consumers are eager to find new snacks with over half (56%) saying they need more "snackspo" (or snack inspiration) in their life, especially millennials (69%) and Gen Z (67%). While much of this discovery still occurs in-store, interest in virtual channels is on the rise. **The same percentage of consumers (56%) says they are more likely to find new snacks from digital channels than in-person ones,** with millennials (70%) and Gen Z (65%) particularly agreeing with this statement.

Digital channels are also extending and enriching the snacking exploration process. Nearly eight in 10 consumers (78%) either have bought or would buy a snack in-store after seeing it online, including over half (52%) who have already done so. That's just about equal to the number of those who said they have bought a snack as a result of an in-store sample (50%). Digital channels are also helping consumers do their homework, as 74% either have or would research a snack online before buying it, especially millennials (85%) and Gen Z (82%).

PROPORTION OF SHOPPING CONDUCTED ONLINE VS. IN-PERSON



More than half of consumers would browse for snacks to buy in a virtual experience (53%), especially millennials (67%) and Gen Z (63%).

While a majority of snack shopping still occurs in-person, consumers imagine a rise in online shopping in the next year.

ONE SNACK DOES NOT FIT ALL

In an increasingly digital world, personalization has become an expectation – and snacking is no exception. **Nine in 10 (90%) consumers around the world agree that everyone has different nutritional needs and that snacks should meet different nutritional needs for different consumers (84%).** Around two-thirds (65%) are looking for snacks that are personalized based on their health needs, especially consumers in Asia Pacific (77%).

Consumers are also seeking customization that can make the shopping and snacking process more enjoyable. Six in 10 (61%) are looking for snacks that offer a personalized shopping experience (e.g., tailored based on past snack purchases, flavor preferences, etc.), particularly millennials (75%), Gen Z (69%), and parents (66%). Half are also looking to tailor the snack's appearance, saying they are looking for snacks where they can personalize the packaging (49%), including six in 10 millennials (62%) and Gen Z (58%). Seven in 10 consumers (69%) also attest that personalized snacks make a great gift, especially those in India (87%), Indonesia (85%), and South Africa (83%).

61%

of consumers are looking for snacks that offer a personalized shopping experience.

90%

of consumers around the world agree that everyone has different nutritional needs.

SNACK LOVE

There's no doubt that consumers are devoted to their favorite snacks. **Six in 10 (61%) will go out of their way to find their favorite snack,** while a similar percentage (63%) would even pay extra to bring back some of their favorite childhood snack brands, especially millennials (73%). Over half (55%) would even go as far as standing in line if a discontinued snack they once loved was brought back. On the flip side, nearly half (44%) either have complained or would complain on social media about the discontinuation of their favorite snack, including one in five who have already done so (20%), including over a quarter of millennials (27%).

Familiar snacks appear to be particularly important in the current environment. **Two-thirds (65%) agree they prefer brand name snacks to store brand or generic ones** and a similar percentage (67%) would buy fewer of their favorite snack brand, rather than buying the generic alternative, regardless if it's less expensive. Three-quarters of millennials (74%) would do so as well.

74%

made of would make a point of getting a new snack flavor as soon as it came out, including 84% of millennials and 81% of Gen Z.

56%

stood / would stand in line for a limited or special edition of a favorite snack, including 70% of Gen Z and millennials.

72%

tried / would try a snack collaboration, including 84% of Gen Z and millennials.

MINDFUL SNACKING

Conscious consumption continues to drive appetite for balanced indulgence

MINDFUL INDULGENCE

Indulgent snacking is an intentional pursuit, with eight in 10 consumers (80%) saying they are selective about the indulgent snacks they choose. This statement is especially true among consumers in Mexico (87%), India (87%), and Indonesia (87%). **Consumers are also making an effort to be mindful and present while enjoying these types of snacks,** as over three-quarters (78%) are more likely to take time to savor indulgent snacks.

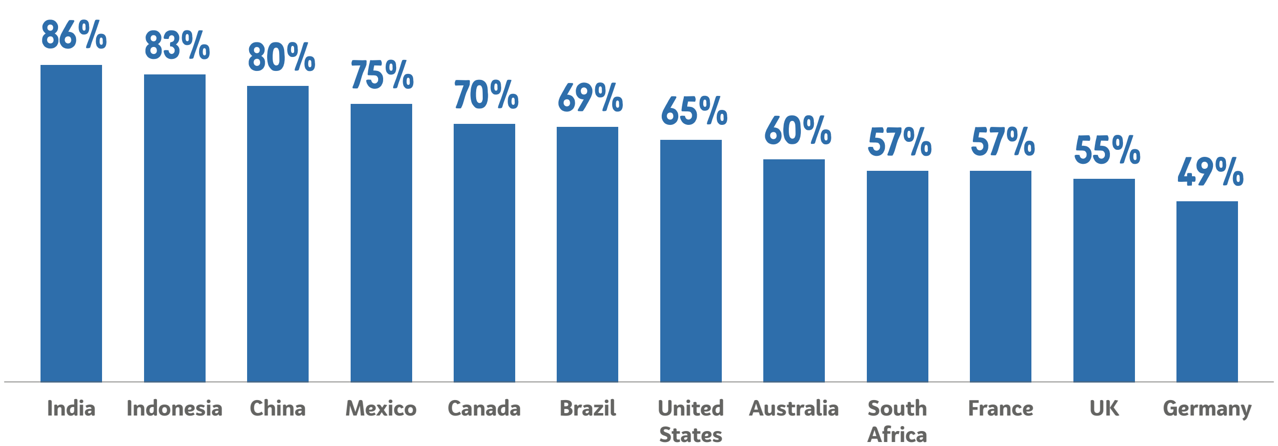
Many are also tuning into portion sizes, saying they typically take time to portion out snacks before eating them (61%), especially millennials (69%). **Majorities also agree they check nutrition labels on snacks before buying them (68%)** and that doing so makes them feel like a more informed consumer (73%). Checking nutrition labels appears to be especially popular in India (86%), Indonesia (83%), and China (80%).

78%
are more likely to take time to savor indulgent snacks.

63%
Two-thirds of consumers are less restrictive in their eating habits than in the past, agreeing that they are more intuitively tapping into their mood and other factors to guide food choices.

68%
check nutrition labels on snacks before buying them.

"I CHECK NUTRITION LABELS ON SNACKS BEFORE BUYING THEM"



A MOMENT FOR CONSCIOUS NOURISHMENT

Consumers are transparent about the fact that they are looking for different kinds of snacks to meet different needs in their lives (71%) – and indulgence is one of those key needs. **The vast majority believe they regularly snack to pamper or reward themselves (78%) and for a sense of comfort (77%),** including an overwhelming majority of millennials (85% for both reasons).

This is especially true in the current climate as three in four attest "these days, it's more important than ever to have moments of indulgence in the day" (78%) and that "tough times call for delicious snacks" (73%). **A similar percentage (72%) agree that "in tough times, I rely on little luxuries like chocolate to get through the day."** Interestingly, less than half (46%) report they feel guilty when enjoying an indulgent snack or treat, though the percentage rises for the younger generations (53%).

Most consumers agree that indulgent snacks are part of their everyday life (61%), especially those in Asia Pacific (68%), and that they provide moments of peace in their day (75%). **Two-thirds (65%) attest chocolate is a staple in their diet and that they rely on it to meet a flavor need that is hard to get from other foods.** This appears to be especially true in India (80%) and Brazil (70%).

% WHO EAT CHOCOLATE WEEKLY OR MORE

2019		2022
56%	VS	61%

83% believe "Food is medicine and can be used to improve wellbeing."

84% believe that "Chocolate is good for the soul."

INDULGENT SNACKS BOOST WELLBEING...

Boost my mood	78%
Have high quality ingredients	76%
Make me feel healthy and strong	64%

APPETITE FOR SUSTAINABILITY

Many seek to lessen their environmental footprint with regenerative snacking

SNACKS THAT GIVE BACK

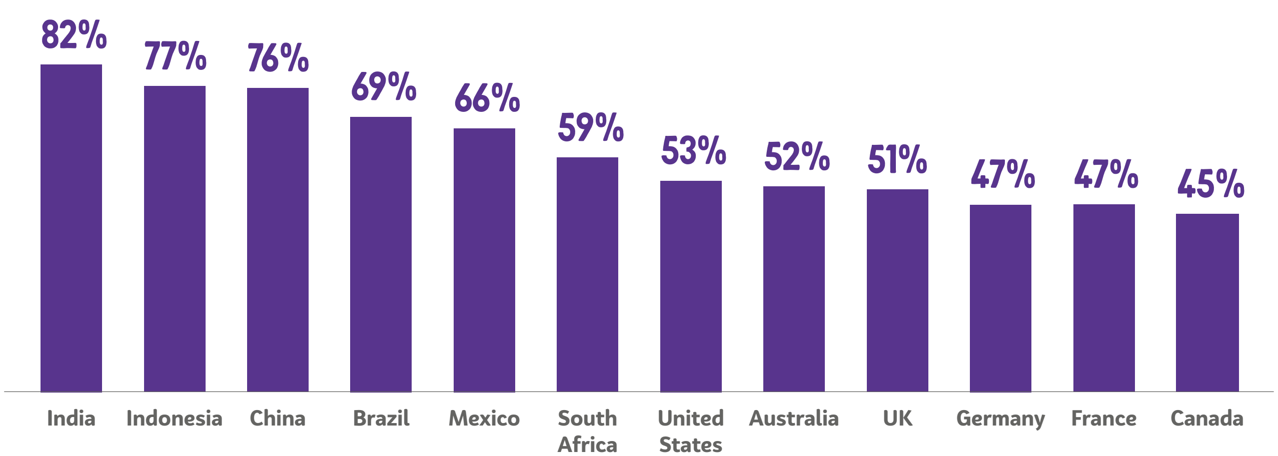
Last year, we reported on the importance of low impact snacking, as majorities of consumers declared that they are becoming more intentional about their purchases. Reducing waste was their top sustainable snacking priority. This trend continues, as majorities are taking action to cut down on snack packaging. **Seven in 10 consumers agree they prioritize snacks that have less plastic packaging (70%)** and, when they do have snack packaging to contend with, 72% report they typically recycle it. Moreover, most are craving a system that goes beyond recycling to an even more regenerative approach. A full 82% report they wish more snacks had biodegradable packaging.

Consumers are not expecting companies to bear the full brunt of these efforts – in fact, consumers around the world are willing to pay a premium for sustainability. Over six in 10 (61%) agree they would pay a small carbon tax on a snack to offset the environmental impact of making it. Consumers also agree that snacks that have a higher environmental impact should cost more (63%), especially millennials (70%) and Gen Z (69%). Most are willing to foot the bill, as majorities will pay more for snacks that are better for the environment (64%) and for snacks that contain ethically sourced ingredients (65%).

69%

agree that "Sustainable packaging helps me enjoy my snack more."

"I WOULD PAY A SMALL CARBON TAX ON A SNACK TO OFFSET THE ENVIRONMENTAL IMPACT OF MAKING IT"



RISE OF PLANT-BASED SNACKING

Consumers are more tuned in than ever to how the ingredients of their snacking choices impact the environment. **Two-thirds (66%) are actively looking for snacks that work to minimize their environmental impact, especially Gen Z and millennials (both 72%).** One example of this is the plant-based food movement. In fact, seven in 10 (70%) consumers around the world agree that plant-based snacks are better for the future of our planet, especially those in Asia Pacific (80%) and Latin America (78%).

Beyond an intellectual understanding of the benefit, consumers also report rising access and interest in eating plant-based snacks. Seven in 10 (72%) are noticing more plant-based foods in their grocery stores, especially those in Indonesian (85%), Indian (83%), and British (78%) markets. A majority is interested in experimenting with these environmentally friendly swaps, as 64% would try a plant-based version of their favorite snack that either has a meat ingredient substituted for non-meat or a dairy ingredient substituted for a non-dairy one, with over a third (35%) reporting that they already have.

54%

of consumers are making an effort to eat more plant-based snacks.

% MAKING AN EFFORT TO EAT LESS MEAT

58% Globally

70% Asia Pacific

% MAKING AN EFFORT TO EAT LESS DAIRY

49% Globally

59% Latin America

METHODOLOGY

This survey was conducted online by The Harris Poll on behalf of Mondelēz International from September 18-October 17, 2022, among 3,530 global adults ages 18 and older. The research annually spans 12 markets, including: The United States (n=250), Canada (n=250), Mexico (n=251), Brazil (n=256), France (n=250), Germany (n=255), The United Kingdom (n=251), Russia (n=250), China (n=250), India (n=513), Indonesia (n=254), Australia (n=250). The 2022 edition also includes South Africa (n=250).

Other key groups analyzed include: Gen Z / Centennials ages 18-25 (n=553), millennials ages 26-41 (n=1,320), Gen Xers ages 42-57 (n=939), boomers ages 58-76 (n=680), and the silent generation ages 77+ (n=38).

Data from 2021, 2020, and 2019 references similar studies conducted from October 5-22, 2021, among 3,055 global adult respondents, October 6-20, 2020, among 6,292 global adults and from September 16-24, 2019, among 6,068 global adults. Data are weighted where necessary to bring them in line with their actual proportions in the population.

A global post-weight was applied to ensure equal weight of each country in the global total. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

For this study, Ipsos conducted interviews in 27 countries between September and November 2021, with over 1,000 respondents per country. Interviewees were aged 16 to 65 years and total sample in each market represents general population.

FOR MORE INFORMATION, PLEASE VISIT

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