

**Mondelēz**  
International  
SNACKING MADE RIGHT

# THE POST-PANDEMIC PANTRY

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# AGENDA

- 1 Industry Update
- 2 Consumer Demands
- 3 Know Your Employee
- 4 Find The Right Mix
- 5 Best Practices
- 6 Employer Concerns
- 7 Q&A

# INDUSTRY UPDATE

- General Foodservice Insights
  - The entire industry is expected to recover to near pre pandemic levels by 2022<sup>1</sup>
  - Vending and Micro Markets are leading the post-pandemic rebound and operators expect to see a 64% growth in 2022 over 2020<sup>1</sup>
  - 46% of consumers are snacking now **more than ever**<sup>2</sup>
- Micro Market
  - “Micro Market sales are expected to recover the fastest and are expected to outpace all other convenience services through 2025...at the expense of vending”<sup>1</sup>
  - More than 85% of operators said they “definitely” think the **Micro Market could replace manual foodservice**<sup>4</sup>
- Vending
  - Vending won’t reach 2019 revenue levels until 2024 or 2025<sup>1</sup>
  - The biggest opportunity is for **operators who use technology to their benefit** and expand traditional vending into new and different ways and areas<sup>1</sup>
  - Nearly 90% of vending machines offer a **cashless option**<sup>4</sup>

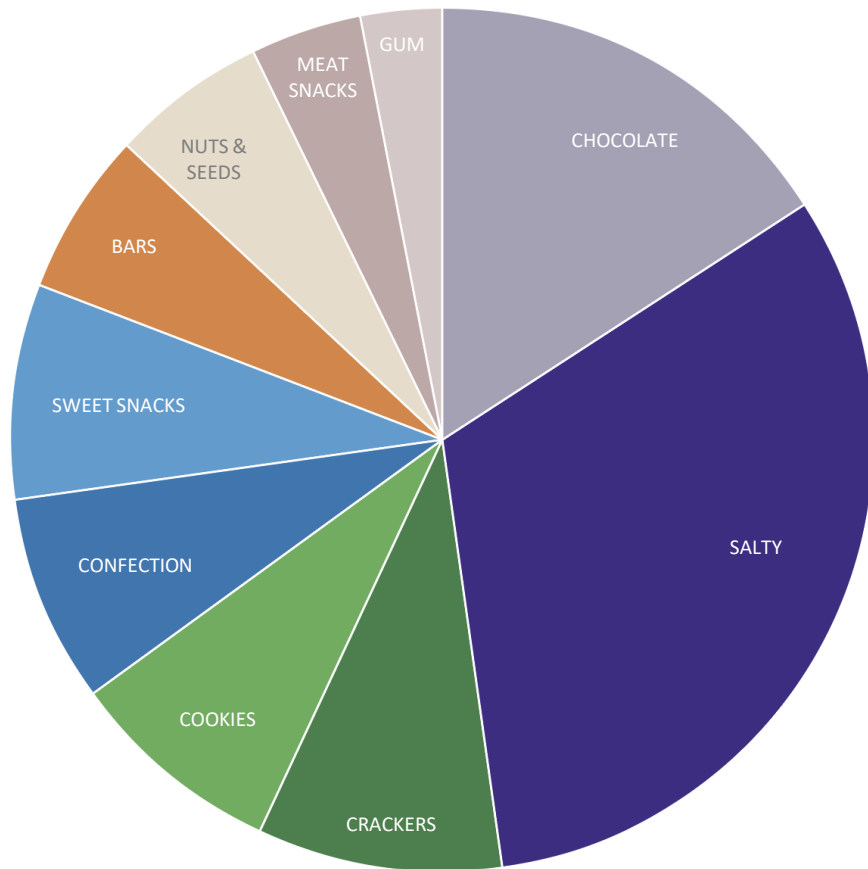
1. Eric Dell, Executive Vice President of NAMA – NAMA Show 2021 in partnership with Technomic

2. Mondelez International and The Harris Poll, 2020

3. CNBC.com – ‘Morale is low’: Workers grow weary of ‘The Great Wait’ to return to office (Jennifer Liu)

4: VendingMarketWatch.com – Annual Report State of the Industry June/July 2021

# CONSUMER DEMANDS



Share of Snacks<sup>1</sup>

- **Merchandizing overhauls** continue to bring in new consumers and increase customer spend
  - Knowing your audience and their snacking habits will help you build the perfect pantry
- Employees like options:
  - Provide variety of **individually packaged snacks in key categories** that span across **categories, brands, flavors, sizes and formats**
    - Breakfast bars
    - Cookies
    - Sour candy
    - Salty snacks
    - Snacks for sustenance
    - Better-for-you
    - Permissible indulgence
    - Meal replacements

1: Nielsen—Total US xAOC Incl Conv, 52 weeks ending 4/25/20

# KNOW YOUR EMPLOYEE

Each generation has different snacking patterns and behaviors, reasons for snacking, and snack or brand preferences.

It is essential to know your audience and understand how you can **maximize on these generational differences by providing the right snacks.**

People are snacking more often to:<sup>1</sup>



**Gen Z:**  
Relieve  
boredom



**Millennials:**  
Find comfort

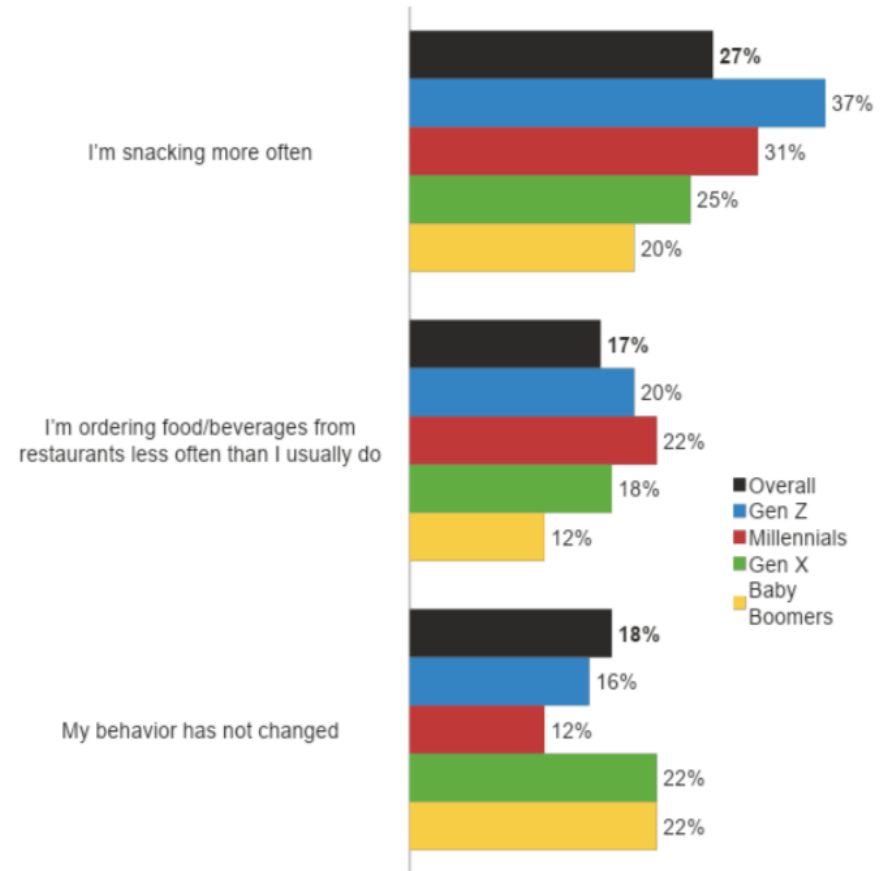


**Gen X:**  
Boost their  
mood



**Boomers:**  
Reward  
themselves

How has your behavior changed as a result of COVID-19?  
Select all that apply.



1: State of Snacking 2020 Global Consumer Trends Study by Mondelēz International & The Harris Poll  
2: 2020 Technomic, Inc., Generational Consumer Trend Report

# FINDING THE RIGHT MIX



## Gen Z:

Index above average for cereal breakfast bars, fruit snacks<sup>1</sup>



## Millennials:

Index above average for these brands<sup>1</sup>



## Gen X:

Index above average for these brands<sup>1</sup>



## Boomers:

Index above average for chocolate candy/candy bars, fresh fruit, crackers<sup>1</sup>



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## BEST PRACTICES

- Data-driven category management is vital to make sure your office pantry is stocked with the snacks your employees want
- Products should be **rotated by daypart, seasonality, and product turnover** to keep on-trend snacks available and top of mind
- Offerings should be **tailored to the predominant demographic** by location
  - Give employees the option to **share their snacking needs and desires**
  - **Be open to negative feedback** and react accordingly
- Greater shelf space means more opportunity to stock multiple formats and flavors of consumers favorite snacks

# EMPLOYER CONCERNS

Safety & sustainability reign supreme

- Fully exposed fresh food is not going to be welcomed – a **safe environment is imperative**<sup>1</sup>
- **Social distancing** remains a priority
  - **No-contact, low touch options are preferred**
- Let your employees share their concerns<sup>2</sup>
  - Don't assume: discover what your specific employees' concerns are and act accordingly
- Offering **recognizable brands** and **enhancing offerings** will keep enthusiasm high and return to work momentum positive
  - **Entice employees back to work** with meal replacements, add-ons and substitutes
    - Premade sandwiches, snack boxes, beverages and desserts in refrigerated and frozen sections



1: VendingMarketWatch.com – For 2021- Massive Micro Market Growth Predicted

2: Harvard Business Review: Help Your Employees Who Are Anxious About Returning to the Office (Amy Gallo)



# QUESTIONS?



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**VENDING &  
MICRO MARKETS**