



# Snacks in the US

July 2024

Table of Contents

## Snacks in the US

### EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for snacks?

### MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024

Table 2 - Sales of Snacks by Category: Value 2019-2024

Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024

Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Snacks: % Value 2020-2024

Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024

Table 7 - Penetration of Private Label by Category: % Value 2019-2024

Table 8 - Distribution of Snacks by Format: % Value 2019-2024

Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029

Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Chocolate Confectionery in the US

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Growth in retail value sales, although retail volumes decline

Boxed assortments grows overall

The year of oat milk chocolate

#### PROSPECTS AND OPPORTUNITIES

Growth expected, but costs bound to increase

Health and wellness trends likely to reshape the landscape

Expansion of consumption occasions set to contribute to growth for seasonal chocolate

### CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

## Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

### Gum in the US

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Chewing gum defies inflationary pressures  
Bubble gum continues its fall from relevance  
Consolidation and recovering sales create a competitive landscape

#### PROSPECTS AND OPPORTUNITIES

Gum recovery slow but sure, but consumption set to plateau  
Gen Z's interest in chewy and gummy confectionery an opportunity for gum  
Ingredient statements and functional claims will gain greater relevance

#### CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024  
Table 26 - Sales of Gum by Category: Value 2019-2024  
Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024  
Table 28 - Sales of Gum by Category: % Value Growth 2019-2024  
Table 29 - Sales of Gum by Flavour: Rankings 2019-2024  
Table 30 - NBO Company Shares of Gum: % Value 2020-2024  
Table 31 - LBN Brand Shares of Gum: % Value 2021-2024  
Table 32 - Distribution of Gum by Format: % Value 2019-2024  
Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029  
Table 34 - Forecast Sales of Gum by Category: Value 2024-2029  
Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029  
Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

### Sugar Confectionery in the US

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Retail value and volume sales grow thanks to novelty  
Mints ekes out another slow but positive year towards recovery  
Ricola leads as cough drops come down from 2022 peak

#### PROSPECTS AND OPPORTUNITIES

Increasing bans on synthetic colours will bring reformulation  
A competitive market will incentivise new product development  
GLP-1 medication unlikely to curtail sales of sugar confectionery

#### CATEGORY DATA

Summary 2 - Other Sugar Confectionery by Product Type: 2024  
Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024  
Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024  
Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024  
Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024  
Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024  
Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024  
Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024  
Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

## Ice Cream in the US

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Retail value sales rise even as volumes continue to decline

Ice cream desserts capitalises on celebratory occasions

Channel shifts stabilise for ice cream

#### PROSPECTS AND OPPORTUNITIES

Impact of sustainability on the ice cream cold chain

Frugality anticipated to continue as the cost of living remains high

Ice cream in the age of health and wellness claims

#### CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

## Savoury Snacks in the US

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Private label maintains loyalty as consumers adjust to a volatile climate

Consumers focus on value and better ingredients over better for you

Demand for value-priced proteins fuels innovation

#### PROSPECTS AND OPPORTUNITIES

Value and flavour will remain non-negotiables

Flavour innovations to tempt consumers beyond the shock factor

Legislative impact on ingredient innovations

#### CATEGORY DATA

Summary 3 - Other Savoury Snacks by Product Type: 2024

- Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024
- Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024
- Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024
- Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024
- Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024
- Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024
- Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024
- Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029
- Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029
- Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029
- Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

## Sweet Biscuits, Snack Bars and Fruit Snacks in the US

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

- Fruit snacks continues to grow due to its health halo
- Protein saves snack bars
- Price rises challenge volume recovery in sweet biscuits

#### PROSPECTS AND OPPORTUNITIES

- Novelty to fuel volume recovery strategies for sweet biscuits
- Climate change set to impact categories in sweet biscuits, snack bars and fruit snacks
- Rising cost of living presents a challenge in retail

#### CATEGORY DATA

- Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024
- Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024
- Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024
- Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024
- Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024
- Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024
- Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024
- Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024
- Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024
- Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024
- Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024
- Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024
- Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024
- Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024
- Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024
- Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024
- Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029
- Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029
- Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029
- Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/snacks-in-the-us/report](http://www.euromonitor.com/snacks-in-the-us/report).