

# Snacks in the US

July 2023

Table of Contents

## Snacks in the US

### EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for snacks?

### MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2018-2023

Table 2 - Sales of Snacks by Category: Value 2018-2023

Table 3 - Sales of Snacks by Category: % Volume Growth 2018-2023

Table 4 - Sales of Snacks by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Snacks: % Value 2019-2023

Table 6 - LBN Brand Shares of Snacks: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Snacks by Format: % Value 2018-2023

Table 9 - Forecast Sales of Snacks by Category: Volume 2023-2028

Table 10 - Forecast Sales of Snacks by Category: Value 2023-2028

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Chocolate Confectionery in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Chocolate confectionery sees polarisation

Innovations tackle lifestyle stressors and help engage chocoholics in new ways

Reigniting impulse purchases of chocolate confectionery in various channels

#### PROSPECTS AND OPPORTUNITIES

Premiumisation set to expand beyond price

Investments strive to offset volatilities in chocolate inputs and restructure the category

Health to further influence how chocolate is consumed

### CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2018-2023

Table 14 - Sales of Chocolate Confectionery by Category: Value 2018-2023

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023

Table 17 - Sales of Chocolate Tablets by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2019-2023

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2018-2023

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

## Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

### Gum in the US

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

More to chew on as growth slows

New flavours, textures, and functional gum show promise for growth

Gum growth contingent on recovering convenience channels

##### PROSPECTS AND OPPORTUNITIES

Consolidating players and recovering sales will lead to a competitive landscape

Successes in novelty sugar confectionery could be translated to gum

Ingredient statements and functional claims will gain greater relevance

##### CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2018-2023

Table 26 - Sales of Gum by Category: Value 2018-2023

Table 27 - Sales of Gum by Category: % Volume Growth 2018-2023

Table 28 - Sales of Gum by Category: % Value Growth 2018-2023

Table 29 - Sales of Gum by Flavour: Rankings 2018-2023

Table 30 - NBO Company Shares of Gum: % Value 2019-2023

Table 31 - LBN Brand Shares of Gum: % Value 2020-2023

Table 32 - Distribution of Gum by Format: % Value 2018-2023

Table 33 - Forecast Sales of Gum by Category: Volume 2023-2028

Table 34 - Forecast Sales of Gum by Category: Value 2023-2028

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

### Sugar Confectionery in the US

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Novelty dominates, while classics hold steady

Strong consumer desire to quell coughs

Mints struggles to regain pre-pandemic volumes

##### PROSPECTS AND OPPORTUNITIES

Innovation and novel developments set to drive growth

E-commerce will continue to grow its share of sugar confectionery

Volume growth to continue, although slowly, after a couple of years of price increases

##### CATEGORY DATA

Summary 2 - Other Sugar Confectionery by Product Type: 2023

Table 37 - Sales of Sugar Confectionery by Category: Volume 2018-2023

Table 38 - Sales of Sugar Confectionery by Category: Value 2018-2023

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2018-2023

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2023-2028

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

## Ice Cream in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Mixed outcomes as pre-pandemic routines return

Inflation leads to price sensitivity amongst consumers

E-commerce as the new convenience channel in ice cream

#### PROSPECTS AND OPPORTUNITIES

Healthy snacking reaches ice cream

Climate change, rising temperatures, and ice cream

Recessionary pressures loom over consumers

#### CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2018-2023

Table 50 - Sales of Ice Cream by Category: Value 2018-2023

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2018-2023

Table 52 - Sales of Ice Cream by Category: % Value Growth 2018-2023

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2018-2023

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2018-2023

Table 55 - NBO Company Shares of Ice Cream: % Value 2019-2023

Table 56 - LBN Brand Shares of Ice Cream: % Value 2020-2023

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2019-2023

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2020-2023

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2019-2023

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2020-2023

Table 61 - Distribution of Ice Cream by Format: % Value 2018-2023

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2023-2028

Table 63 - Forecast Sales of Ice Cream by Category: Value 2023-2028

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

## Savoury Snacks in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Players target households without children with bolder flavours

Meat snacks fails to fulfil its previously anticipated potential

SKU reduction as a strategy to prevent shortages

#### PROSPECTS AND OPPORTUNITIES

Players will have to judge the balance between health and comfort in savoury snacks

Sustainability likely to become a critical issue

On-the-go snacking likely to have an impact on formats and packaging

#### CATEGORY DATA

Summary 3 - Other Savoury Snacks by Product Type: 2023

- Table 66 - Sales of Savoury Snacks by Category: Volume 2018-2023
- Table 67 - Sales of Savoury Snacks by Category: Value 2018-2023
- Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2018-2023
- Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2018-2023
- Table 70 - NBO Company Shares of Savoury Snacks: % Value 2019-2023
- Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2020-2023
- Table 72 - Distribution of Savoury Snacks by Format: % Value 2018-2023
- Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2023-2028
- Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2023-2028
- Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028
- Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

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

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Consumers' choices shift as sweet biscuits rise in price
- Fruit snacks shows resilience
- Demand for convenient nutrition fuels a rebound for snack bars

#### PROSPECTS AND OPPORTUNITIES

- Targeted launches from new brands likely to take share from legacy brands
- New features needed to overcome innovation maturity and trading across categories
- Fruit snacks set to grow as healthy snacking persists

#### CATEGORY DATA

- Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023
- Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023
- Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023
- Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023
- Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023
- Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023
- Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2019-2023
- Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2020-2023
- Table 85 - NBO Company Shares of Snack Bars: % Value 2019-2023
- Table 86 - LBN Brand Shares of Snack Bars: % Value 2020-2023
- Table 87 - NBO Company Shares of Fruit Snacks: % Value 2019-2023
- Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2020-2023
- Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023
- Table 90 - Distribution of Sweet Biscuits by Format: % Value 2018-2023
- Table 91 - Distribution of Snack Bars by Format: % Value 2018-2023
- Table 92 - Distribution of Fruit Snacks by Format: % Value 2018-2023
- Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028
- Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028
- Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028
- Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

## 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).