NIQ Perspectives

Food & Beverage

February 20, 2026

"The biggest misread right now is assuming consumers are pulling back, when in reality they're getting sharper. Across ingredients, trends, and total items purchased, spending is being redirected toward moments that justify the choice. Easter remains one of those protected moments for candy and confections—but it will not escape that broader discipline. In 2026, Easter will reward precision, relevance, and execution—and expose strategies that rely on habit instead of earning the moment."

Chris Costagli

Vice President, Thought Leadership F&B Insights Lead, NielsenIQ

Did you know…

- Households with kids under 12 are **1.8x more likely** to start Easter shopping earlier this year?[1]
- Households with kids under 12 are **1.7x more likely** to spend more this Easter than last year?[1]
- Households with teens ages 13 to 17 are **1.2x more likely** to actively seek promotions, indicating stronger budget pressure among families?[1]

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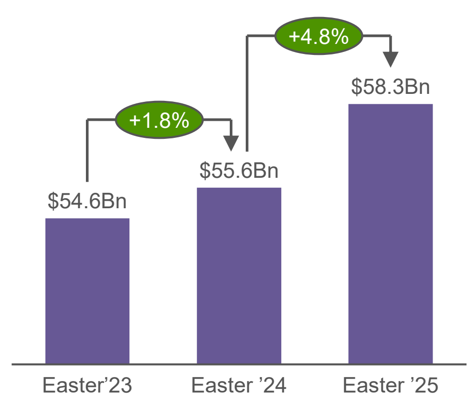
Think beyond the basket, own the occasion

Implications for Food brands

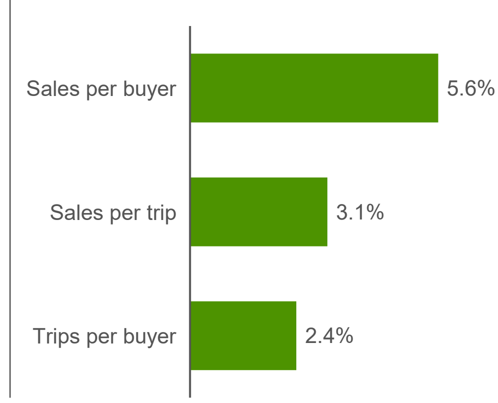
Easter is back in the basket

Easter regained momentum in 2025, highlighting just how elastic seasonal demand can be once pricing pressure eases. Higher egg prices and cocoa costs shaped the season's outcome, but as other inflationary forces softened, shoppers re-engaged. Looking ahead, success won't be fueled by higher prices, but by brands that design demand through relevance, experience, and standout seasonal execution.

F&B DOLLAR SALES EVOLUTION DURING EASTER[2]



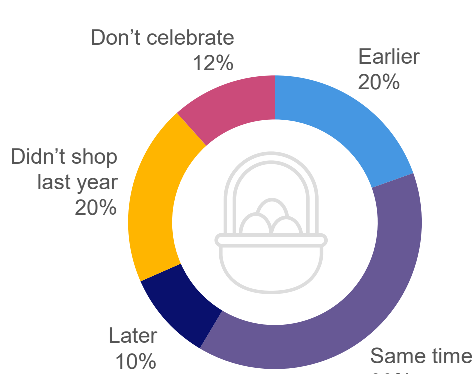
F&B EASTER 2025 PURCHASE TRENDS[3]



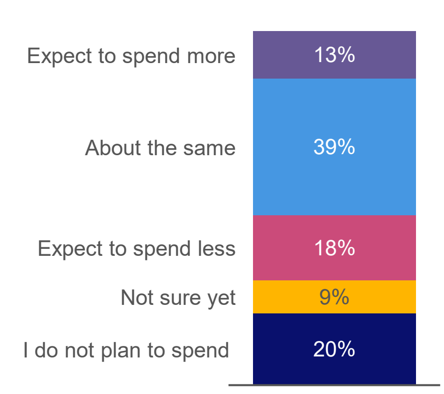
Not every Easter Bunny shops the same way

While spending intent remains flat, Easter shopping behavior is becoming increasingly fragmented. Consumers are breaking into planners, last-minute buyers, and those opting out altogether—yet most strategies still assume a uniform shopper. Winning brands activate demand before, during, and around the holiday with distinct value propositions. One-size-fits-all Easter strategies are officially obsolete.

SHOPPING INTENTIONS FOR EASTER 2026[2]



SPENDING INTENTIONS FOR EASTER 2026[1]



Industry Analysis Sources: [1]NIQ, BASES Quick Question Omnibus Survey, n=2,006, February 2026; [2]NIQ, Retail Measurement Services, Total Full View, Total Food & Beverage; Easter 2025 3-Weeks Ending 4/26/2025 , Easter 2024 3-Weeks Ending 4/06/2024, Easter 2023 3-Weeks Ending 4/15/2023; [3]NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, Total Food & Beverage, 4 Wks Ending 4/26/2025

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The takeaway…

- Chocolate and candy are core Easter basket items, but Easter celebrations create opportunities across the store for retailers
- The channel that captures Easter chocolate sales is positioned to capture the full Easter basket
- Execution will determine the brands and retailers that win this Easter season by successfully connecting value, intent, and willingness to spend

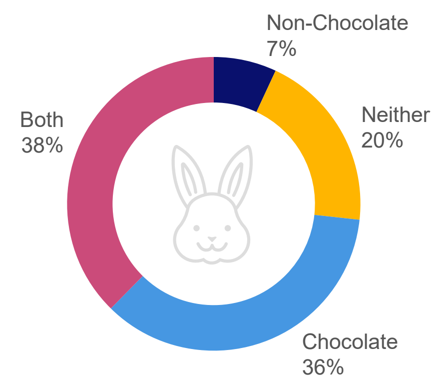
Your next move…

- Retailers should be focused on creating an Easter ecosystem, not just a set of SKUs across the store; connect gifting, entertaining, baking, etc. to win the Easter trip and Easter basket
- Leverage retail media networks to help win Easter trips and Easter baskets with bold marketing and valuable incentives that drive shoppers into your stores and onto your ecommerce platforms
- Brands should get creative with their Easter marketing activity; create viral buzz with meticulously crafted messaging, don't just show up on the shelf; be the Easter purchase that has shoppers saying, "*I need this!*"

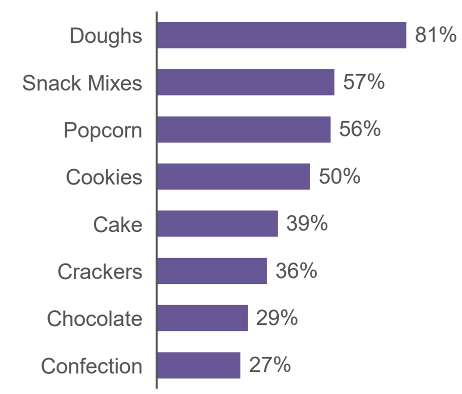
The bunny and the basket are just part of the Easter occasion

While chocolate continues to lead Easter sales, shopper expectations are evolving. Many households—especially families with kids and teens—now look for both chocolate and non-chocolate items in the basket. At the same time, Easter celebrations are driving growth well beyond candy, lifting categories across the store. Retailers that broaden their focus from the basket to the full holiday occasion stand to capture the most growth.

IMPORTANCE OF CANDY DURING EASTER 2026 CELEBRATIONS[2]



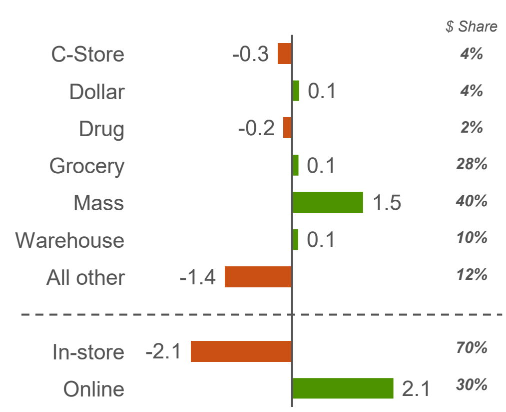
CATEGORIES GROWING DURING EASTER 2025 vs EASTER 2024[1]



Easter has chosen its channel

Mass retailers have become the command center for the Easter trip, gaining $25M and selling 171.8M units in the chocolate category alone as shoppers consolidate spending into a single, efficient shop. At the same time, ecommerce is emerging as the channel where Easter baskets are built for convenience and efficiency. For retailers outside of Mass, Mass is the standard you must contend with this season.

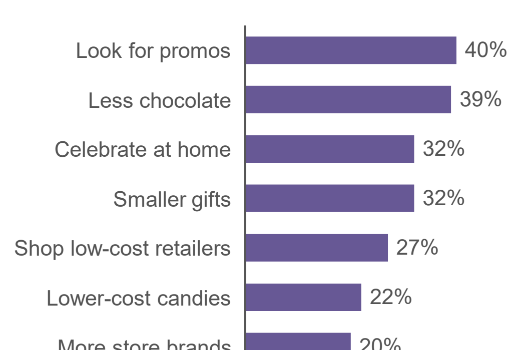
CHOCOLATE DOLLAR SHARE CHANGE DURING EASTER 2025[1]



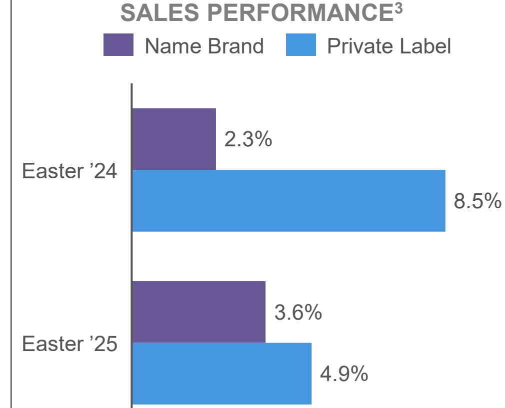
Chocolate can still win, if it's worth it

Although cocoa commodity prices have come down, Easter chocolate prices remain elevated, leading some to reconsider. For many, that means fewer items, smaller packs, store brands, or chocolate alternatives. As promotions and private label gain consideration brands must deliver an experience that earns the premium. Neither private label nor brands have a guaranteed advantage; success comes down to who executes the season best.

CONSUMER STRATEGIES TO REDUCE EASTER SPENDING[2]
(AMONG THOSE EXPECTING TO SPEND LESS)



SEASONAL EASTER CHOCOLATE SALES PERFORMANCE[3]



Questions?

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Easter is already one of the most important occasions for chocolate because it concentrates intent, emotion, and willingness to spend into a single, high-visibility moment. As everyday chocolate trips soften, Easter carries disproportionate weight in driving value, recruiting buyers, and reinforcing brand relevance. This shifts the strategic focus from expansion to precision: fewer purchases, higher expectations, and no tolerance for weak execution. Brands that approach Easter as a curated chocolate experience—anchored in premium cues, gifting formats, and disciplined innovation—will capture outsized returns. Those that rely on price, scale, or habit will increasingly struggle as the category polarizes.

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Industry Analysis Sources: [1]NIQ, BASES Quick Question Omnibus Survey, n=2,006, February 2026; [2]NIQ, Retail Measurement Services, Total Full View, Total Food & Beverage; Easter 2025 3-Weeks Ending 4/26/2025 , Easter 2024 3-Weeks Ending 4/06/2024, Easter 2023 3-Weeks Ending 4/15/2023; [3]NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, Total Food & Beverage, 4 Wks Ending 4/26/2025

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