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NIQ *Perspective*

Snackonomics 4.0: The rules are changing. Are you ready?

“Snacking is entering a tougher era. Value pressure is changing frequency and pulling down impulse occasions, which increases the importance of products that justify the spend. The number one takeaway for leaders is that relevance has to be earned and defended. The action is to simplify the shopper’s decision by building assortments and products that are clear, credible, and easy to choose again.”

Chris Costagli
Vice President,
F&B Thought Leadership

For brands…

Snacking is becoming a category where permission matters more than presence. Build products that resolve the tension between taste, health, and price in a single decision. Treat claims as credibility tests, not shortcuts, and ensure they hold up under scrutiny from both consumers and algorithms. Focus on fewer, sharper bets that can win under pressure rather than spreading innovation too thin.

For retailers…

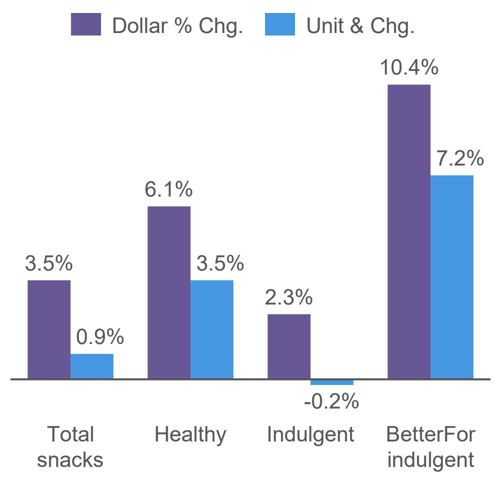
Snacking is becoming harder to win with broad assortments and passive placement. Rebuild the set around clear demand signals that reflect value, health, and justified indulgence. Close gaps in BetterFor™ segments where growth is outpacing your shelf. Treat social-driven demand as a forecasting input so high-interest items are easy to find in-store. Prepare for AI-influenced decisions by making assortments easier to navigate and compare.

Implications for the Snacking Industry

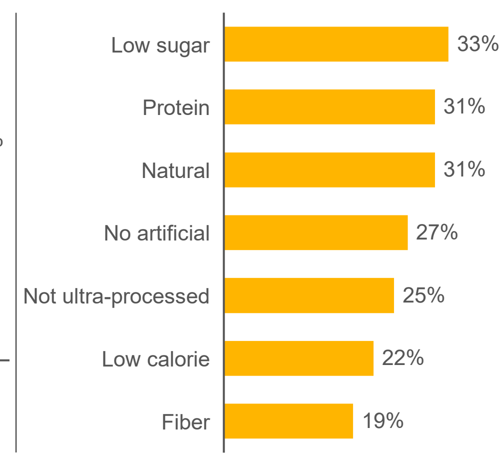
Snack demand shifts towards function, value, and restraint

The carefree snack moment is tightening. Consumers continue to snack, but with sharper judgment. Price pressure is introducing tradeoffs, and indulgence is being reconsidered as health-led options gain traction. The category still turns, but with less tolerance for excess. Growth will come from relevance, not abundance. Manufacturers are focusing pipelines on what matters most. Retailers are streamlining shelves around what earns its spot.

SALES PERFORMANCE ACROSS MAJOR SNACKING SEGMENTS[1]



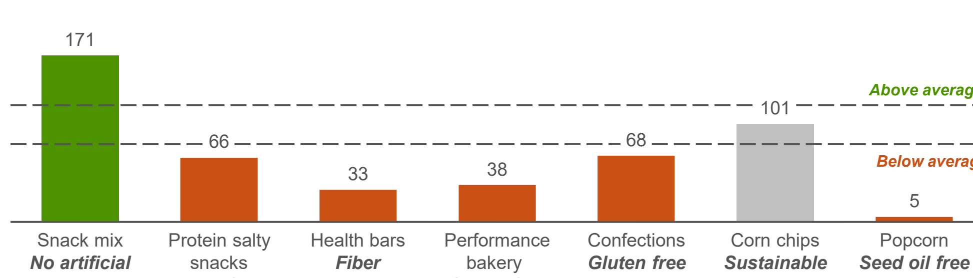
IMPORTANT CONSIDERATIONS WHEN CHOOSING SNACKS[2]



Convenience retailers confront a challenging snack landscape

Convenience stores are losing ground in the snacking ecosystem. Traffic is under pressure as traditional trip drivers fade and impulse spending declines. Healthy snacks are gaining traction, yet assortments fall short in the fastest-growing BetterFor™ segments. Higher gas prices and changing mobility patterns add further pressure. The snack set must be rebuilt for a different kind of trip.

SNACK + CLAIM DEVELOPMENT INDEX, CONVENIENCE CHANNEL VS. TOTAL US FULL VIEW[3]



Size Of Product + Claim, Total US Full View

$21.8M	$45.6M	$974.5M	$74.2M	$2,960.6M	$62.2M	$45.6M

Growth Of Product + Claim, Total US Full View

+24.2%	**+41.5%**	**+6.1%**	**+16.5%**	**+5.6%**	**+65.5%**	**+143.2%**

Industry Analysis Sources: [1]NIQ, RMS Powered By Product Insights, Total Snacking Categories, Total US Full View, 52-Weeks Ending 3/28/2026; [2]NIQ, BASES Quick Question Snacking Survey, n=2,024, March 2026; [3]NIQ, BASES Quick Question Snacking Survey, n=2,006, January 2026; [4]NIQ, Omnisales+, Total TikTok, Select Food & Beverage Categories, 52-Weeks Ending 3/28/2026; [5]NIQ, BASES Quick Question AI Survey, n=2,024, 2026

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The takeaway…

- *The snack decision is shifting away from impulse towards justification.*
- *Growth favors the snacks that resolve tradeoffs that consumers are making, not amplify them.*
- *Snack discovery is accelerating outside the store, but conversions still happen inside it.*
- *Claims can drive snack demand, but credibility is playing a larger role in conversion.*

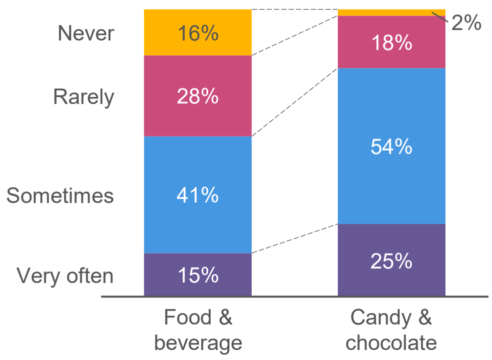
Your next move…

- *Audit your snack portfolio against price, health, and ingredient criteria, and remove items that fail to justify the purchase.*
- *Expand BetterFor™ snack assortments where growth is concentrated and close gaps in underdeveloped segments.*
- *Align snacking innovation with social momentum and ensure distribution is ready when demand peaks.*
- *Optimize snack product data, claims, messaging, and content for AI-driven comparison and tech-driven scrutiny.*

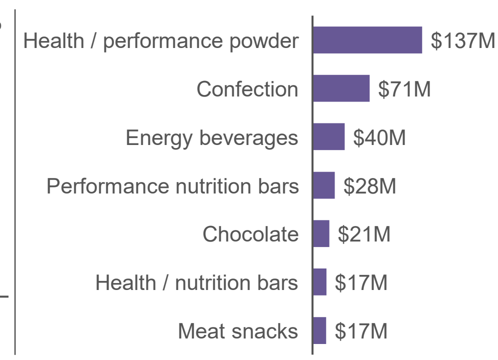
Social media discovery works harder for confection

Social platforms are playing a larger role in discovery. Consumers discover snacks in a fast-moving digital loop shaped by influencers. Confections thrive in this environment, where novelty travels quickly. Yet when it comes time to buy, shoppers still turn to the store. The result is a disconnect between where desire builds and where money is spent.

FREQUENCY OF SOCIAL MEDIA-DRIVEN DISCOVERY[3]
(AMONG THOSE WHO USE SOCIAL MEDIA)



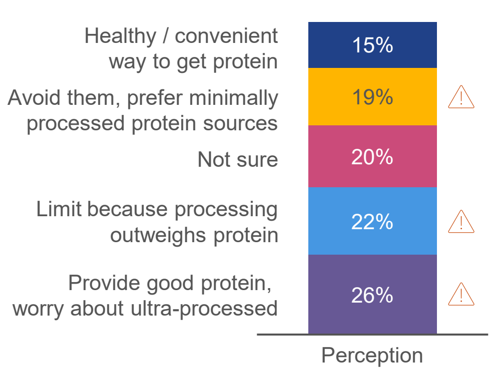
SELECT SNACK CATEGORIES SELLING ON TIKTOK SHOP[4]



Adding protein doesn't make it healthy

Protein continues to drive strong consumer interest in snacking. However, there is growing sensitivity around how products are formulated and positioned. Some consumers are questioning both the necessity and the execution of added protein. This creates a more complex operating environment. Trust is becoming a central factor in performance.

PERCEPTION OF HIGH-PROTEIN, ULTRA-PROCESSED FOODS[5]

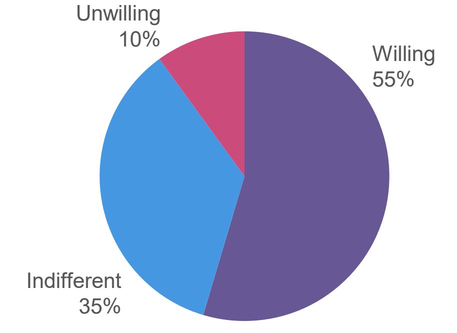


Brand is less important with artificial intelligence

Generative AI is pushing into the food aisle. Its role today is largely advisory, but interest in deeper use is rising. That could change how consumers move through snack options. AI evaluates products against personal criteria such as health, price, & ingredients. As those filters take hold, brand familiarity carries less weight and switching becomes more common.

TOP WAYS SHOPPERS ARE USING ARTIFICIAL INTELLIGENCE[5]

BUY INTENT FOR AI-RECOMMENDED BRAND ALIGNED TO HEALTH GOALS[5]
(AMONG THOSE USING AI TO HELP WITH F&B SHOPPING)



Looking for more?

The snack aisle is heading toward a more demanding era. Near-term growth will depend on striking the right balance between affordability and perceived benefit. Over time, shifting channel dynamics and emerging technologies will reshape where and how products are purchased. Brands will need to compete on both perception and measurable performance.

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