



Snackonomics 4.0

The rules are changing. Are you ready?

Chris Costagli

Vice President, Thought Leadership
Food & Beverage Insights Lead

Carly Levin

Director, Thought Leadership
Sweets & Snacks

May 2026



Consumers don't snack on autopilot anymore

Snacking is personal



The stakes are higher today



A man with a beard, wearing a red polo shirt, is pointing his right index finger directly at the camera. He is smiling slightly. The background is dark and out of focus.

It's not me, it's you



2020-2021

Pandemic

Restrictions, out of stocks, forced trial, channel shifting, and brand shifting

2022-2023

Inflation

Continued channel and brand shifting, increase of private label

2024-2025

Volatility

Tariffs, economic downturn, geopolitical tensions, benefit cuts

2026

Newest normal

Expectations have changed *permanently* –NOT temporarily

Consumers snack to satisfy hunger

55%
snack because
they're hungry

Source: NIQ, BASES Snacking Survey, n=3,213, 2025



They also snack to feel something



Pleasure / joy

50%



Reward

40%



Indulgence

40%



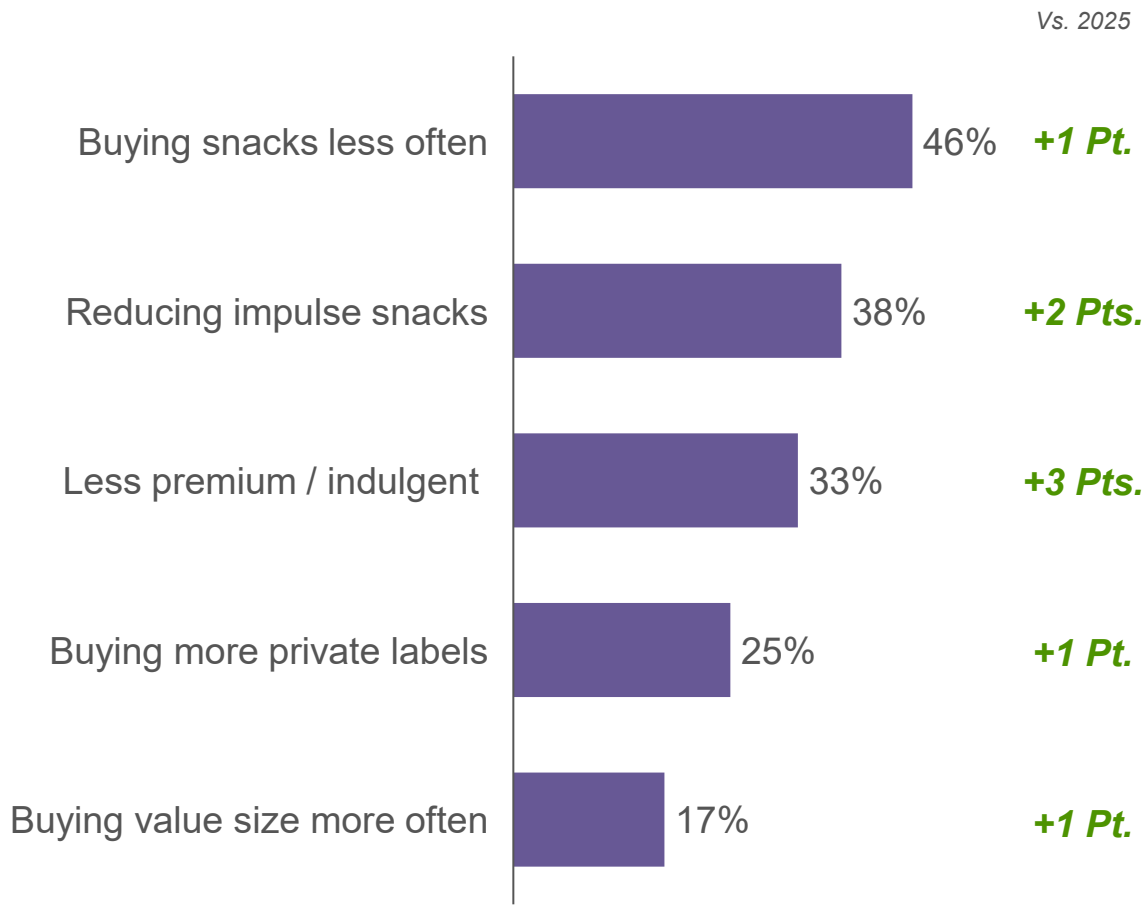
Stress

30%

Source: NIQ, BASES Snacking Survey, n=3,213, 2025

Today's reality has changed snacking

Impact Of Inflation On Snacking Behavior



Source: NIQ, BASES Snacking Survey, n=2,024, 2026 Vs. Year Ago



Healthier snacks check the box on affordable satiety



15%

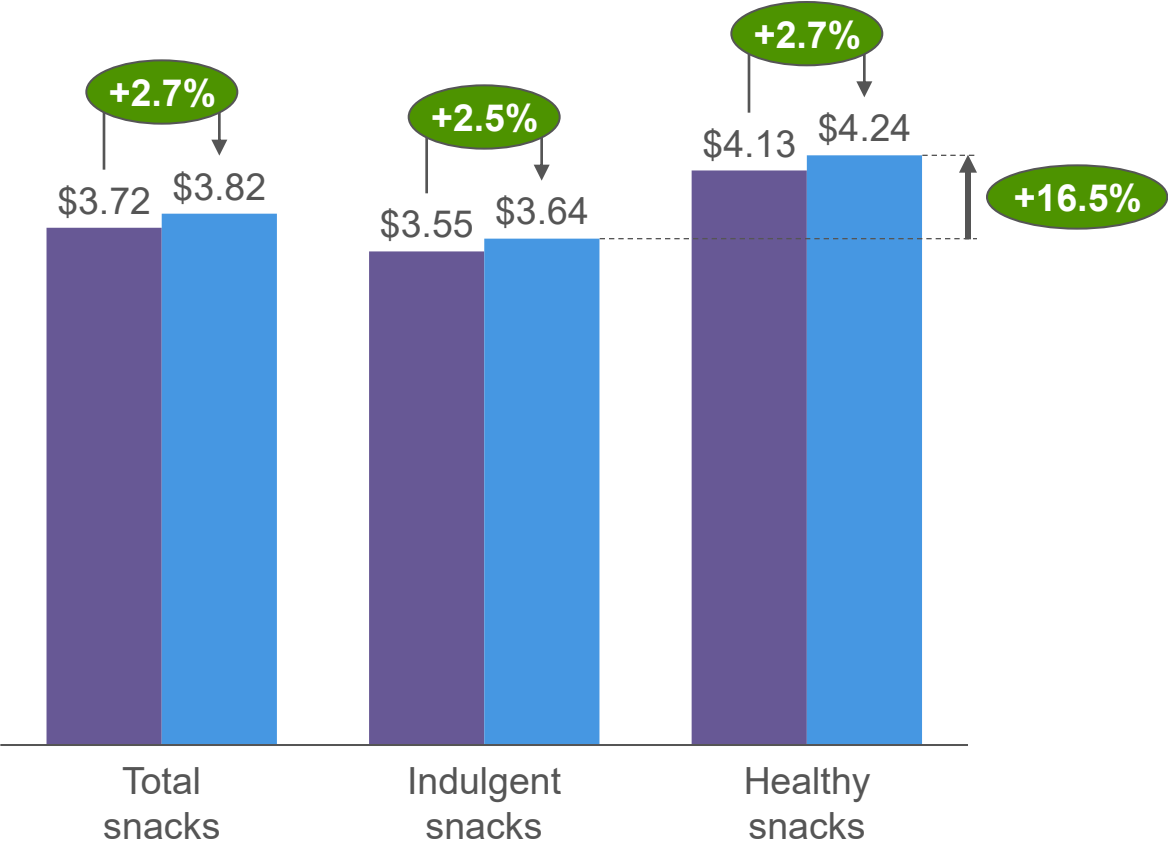
are buying healthier, more filling snacks because they feel more cost effective

Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Snacking got more expensive

Unit Price Comparison

■ Year ago ■ Current



Source: NIQ, RMS, Total US Full View + Conv., 52-Weeks Ending 3/28/2026



Snacking is about balance

32%

snack to energize the body and mind

25%

snack for healthy nutrients

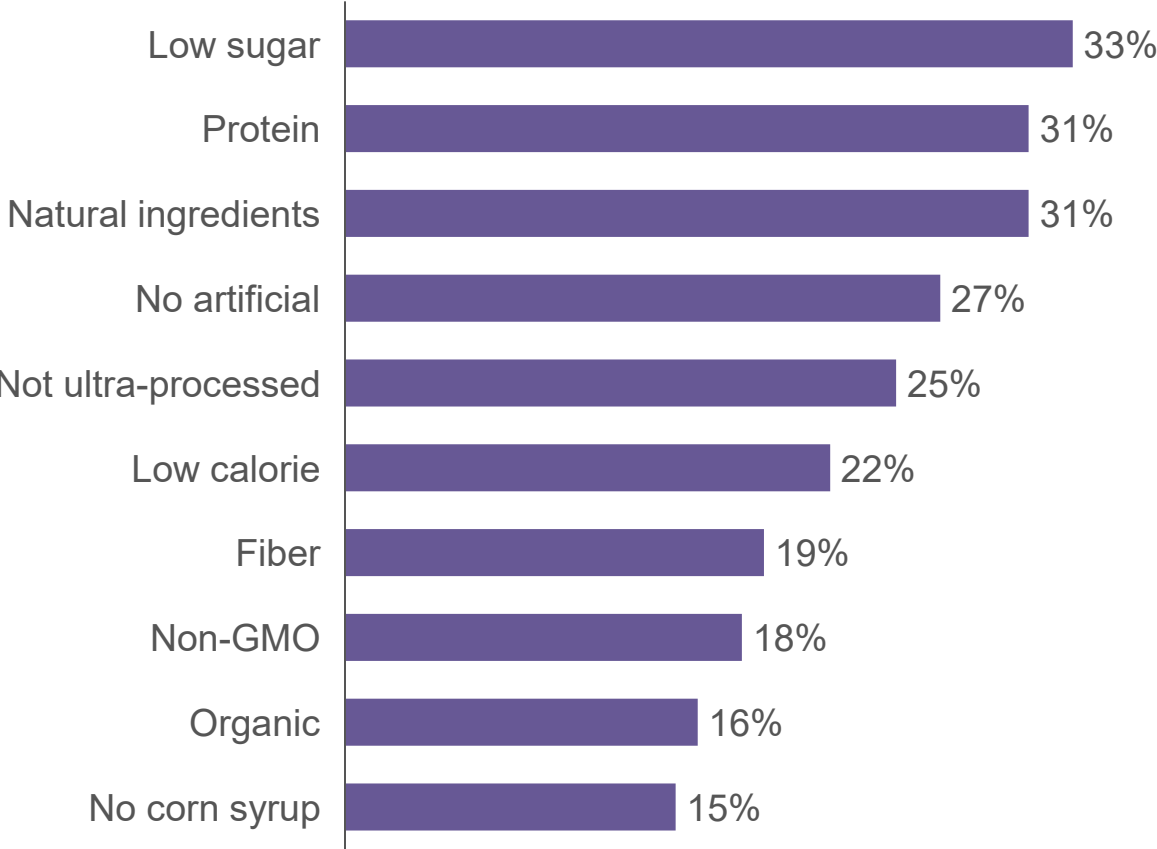


Source: NIQ, BASES Snacking Survey, n=3,213, 2025



Snackers consider a lot when choosing

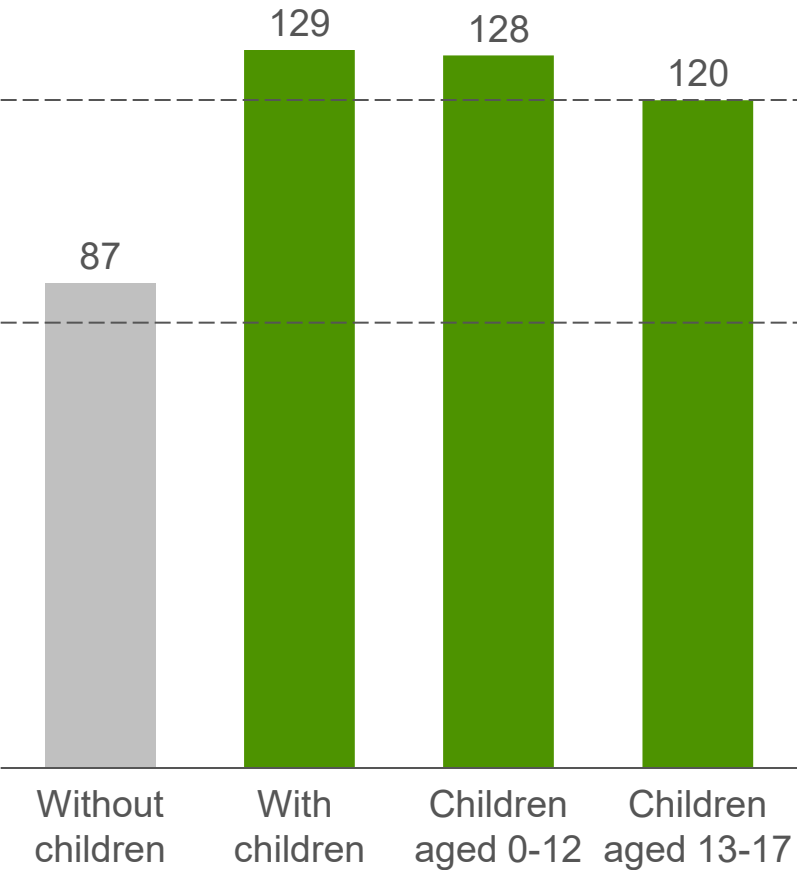
Important Factors When Choosing Snacks



Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Emerging concerns like seed oils are coming into focus

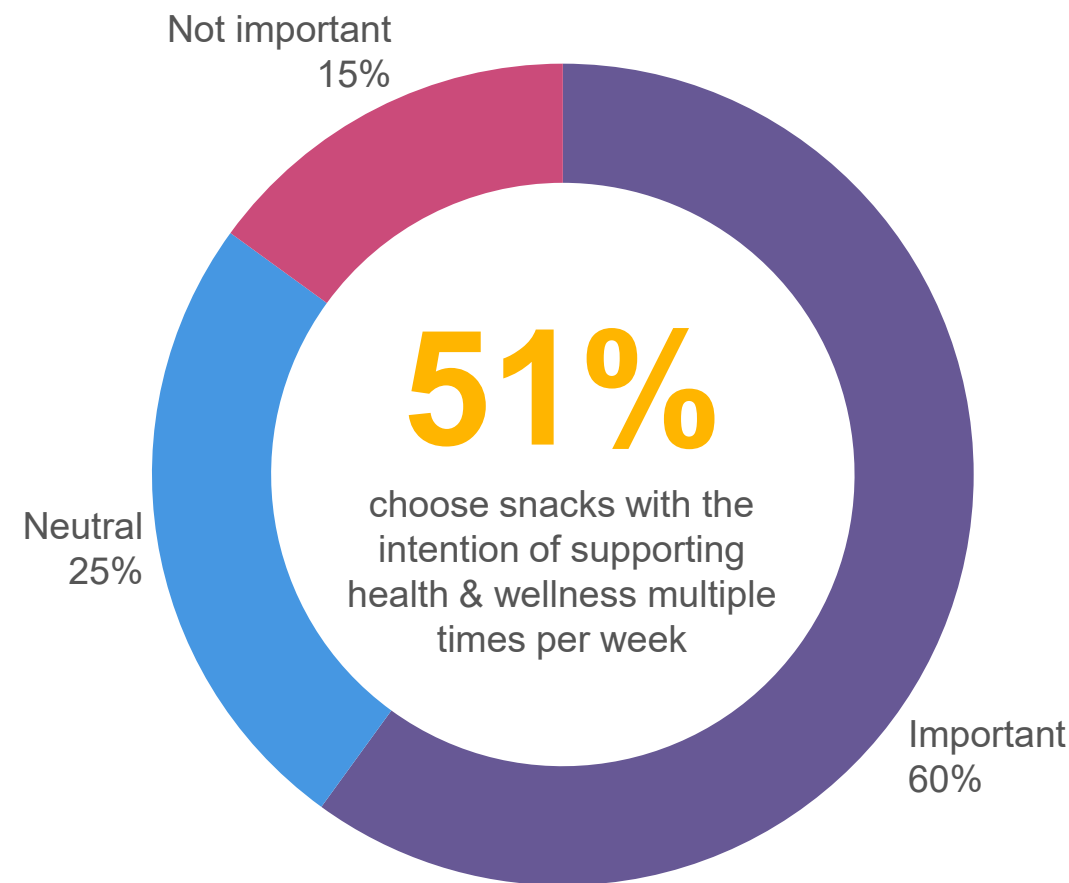
Importance Of No Seed Oils In Snacks
Indexed To Total Respondents



Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Snackers are choosing with health in mind

Importance Of Snacking In Long-Term Health Goals



Source: NIQ, BASES Snacking Survey, n=1,020, 2025



Nutrition drives the decision



41%

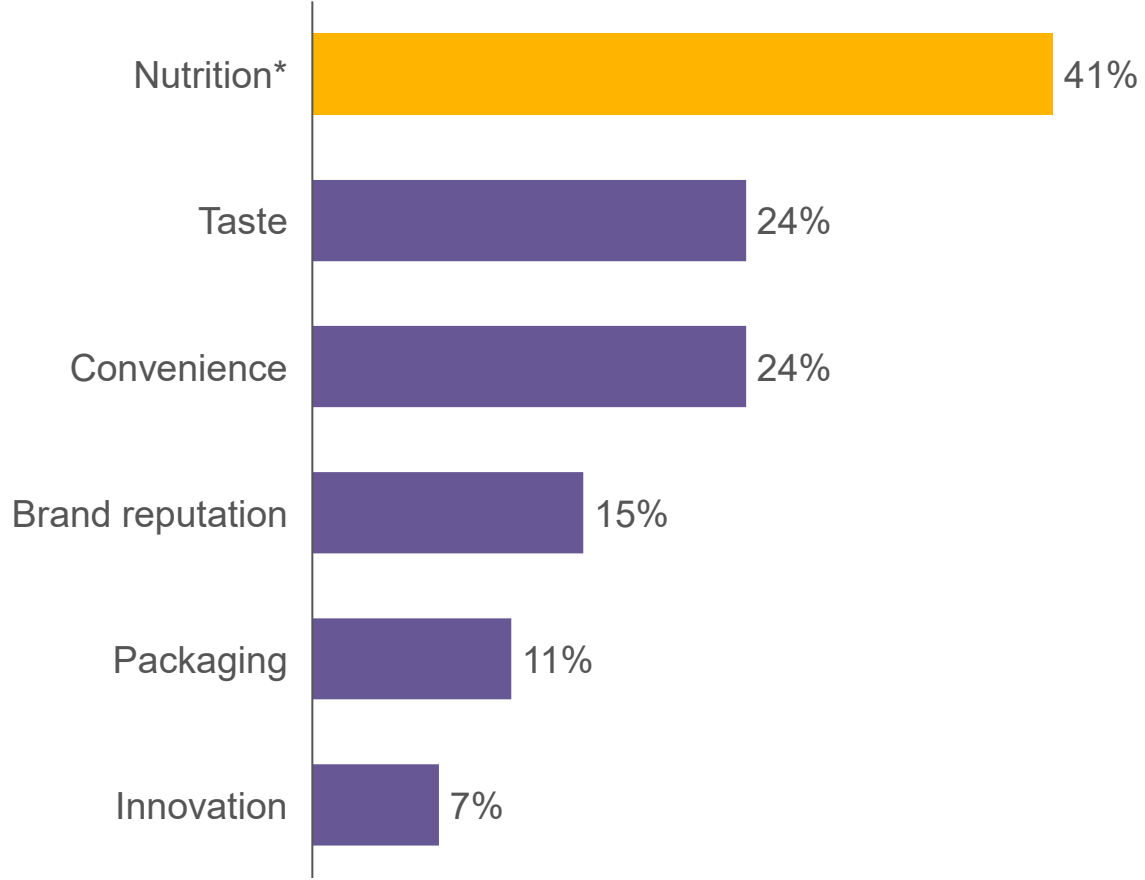
say nutrition is the primary
driver of snacks chosen for
long-term health
(protein, fiber, vitamins, etc.)

Source: NIQ, BASES Snacking Survey, n=1,020, 2025



Other motivations take a back seat

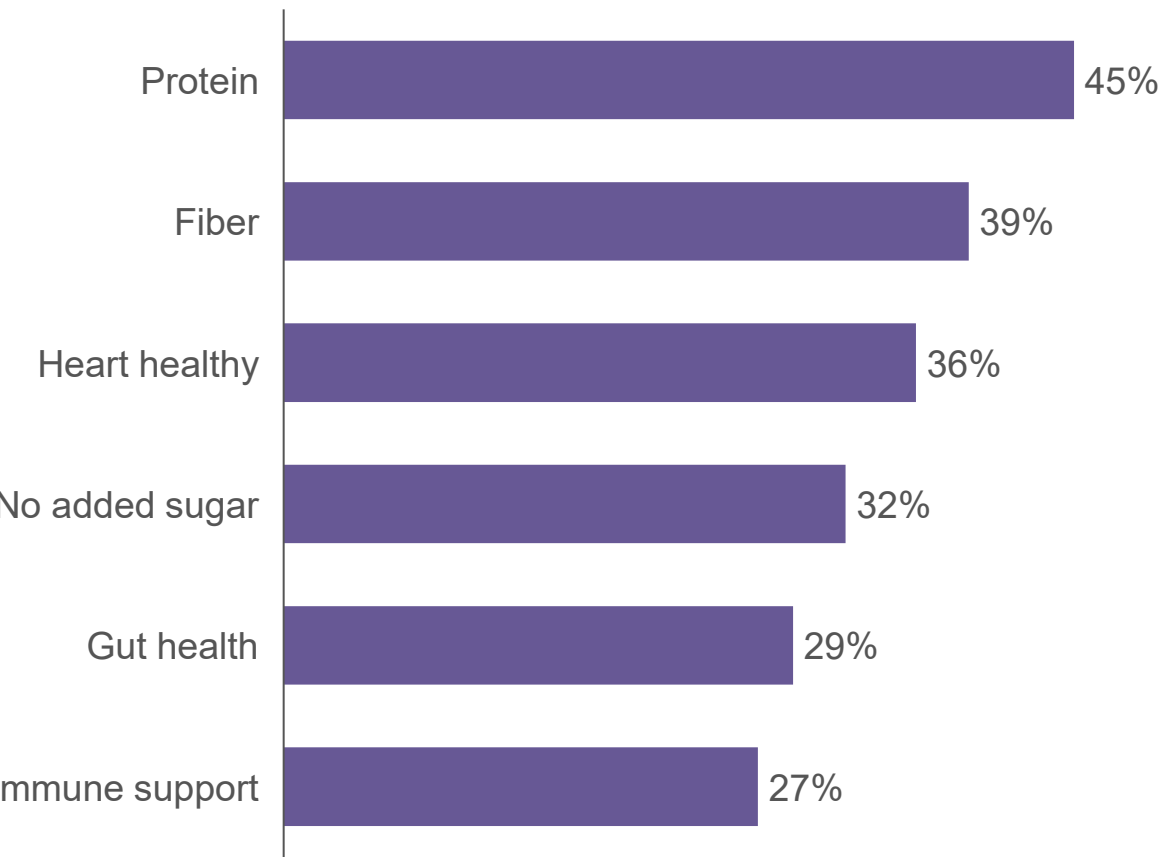
Snack Motivations When Considering Long-Term Health



Source: NIQ, BASES Snacking Survey, n=1,020, 2025
Notes: *Nutrition includes high in protein, fiber, vitamins, minerals, etc.

Protein is #1

Claims That Indicate Snack Long-Term Health Support



Source: NIQ, BASES Snacking Survey, n=1,020, 2025



Consumer lust for protein is insatiable

60%

of consumers say they are
making an intentional effort
to consume more protein
every day

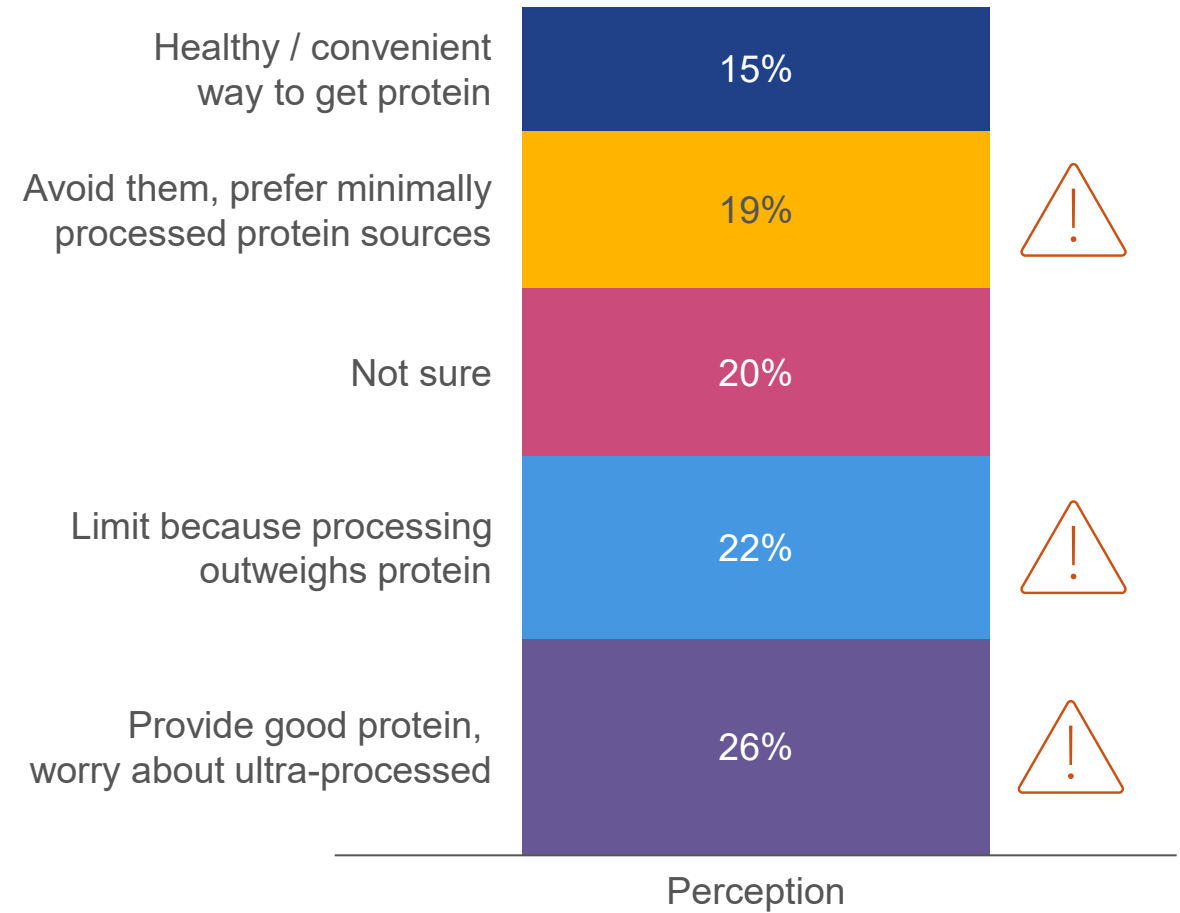


Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025



Just adding protein doesn't make it healthy

Perception Of High-Protein Ultra-Processed Foods



Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025

A close-up photograph of a hand holding a clear martini glass. The glass is partially filled with a clear liquid and contains three green olives. The hand has light-colored skin and is holding the stem of the glass. The background is a solid light green color.

Protein vodka is a real thing

Is the industry overdoing it?



34%

of consumers believe the industry is overhyping protein

(**137** index, Gen Z)
(**131** index, HHs with kids)
(**131** index, Asian)

Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025

Can a product have too much protein?

37%

of consumers think some
products have too much
protein

(**137** index, Gen Z)
(**133** index, HHs with kids)



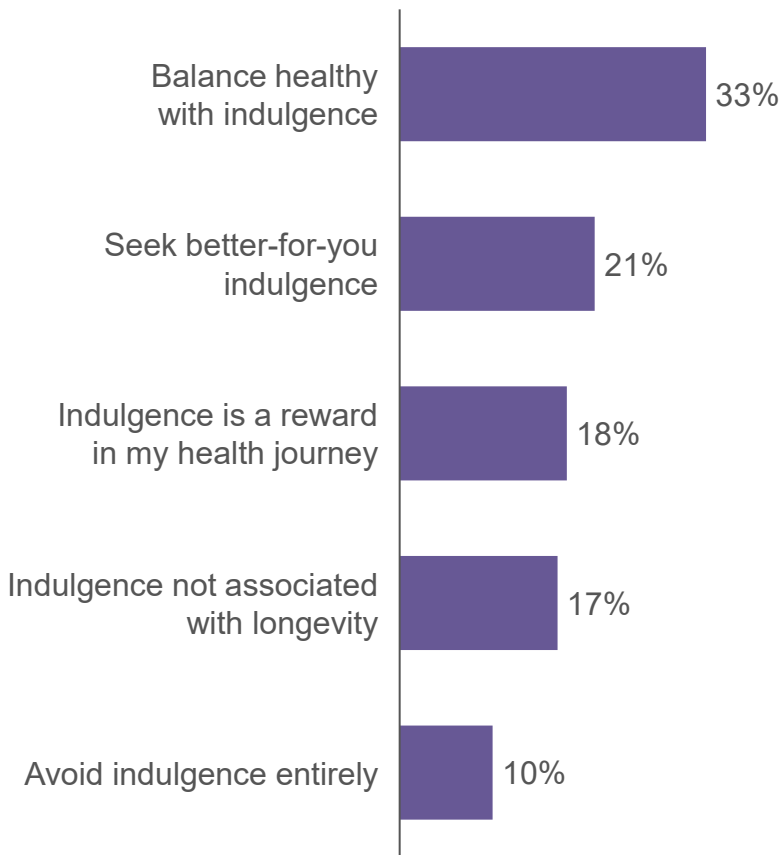
Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025



Authenticity is
the unlock

Does this mean indulgence and long-term health goals can't coexist?

Role Of Indulgence In Longevity

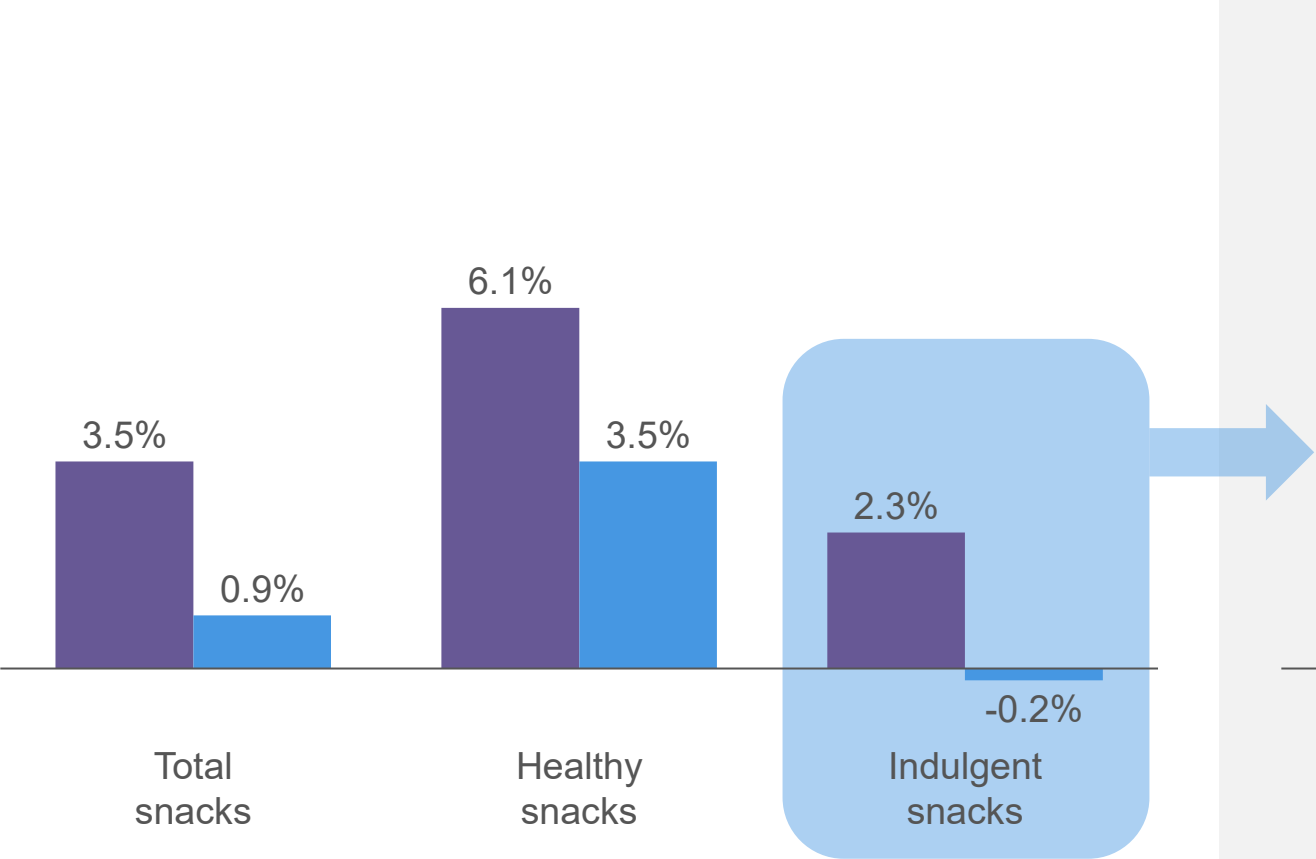


Source: NIQ, BASES Snacking Survey, n=1,020, 2025

Healthy is outpacing indulgent

Sales Performance

Dollar % Chg. Unit % Chg.

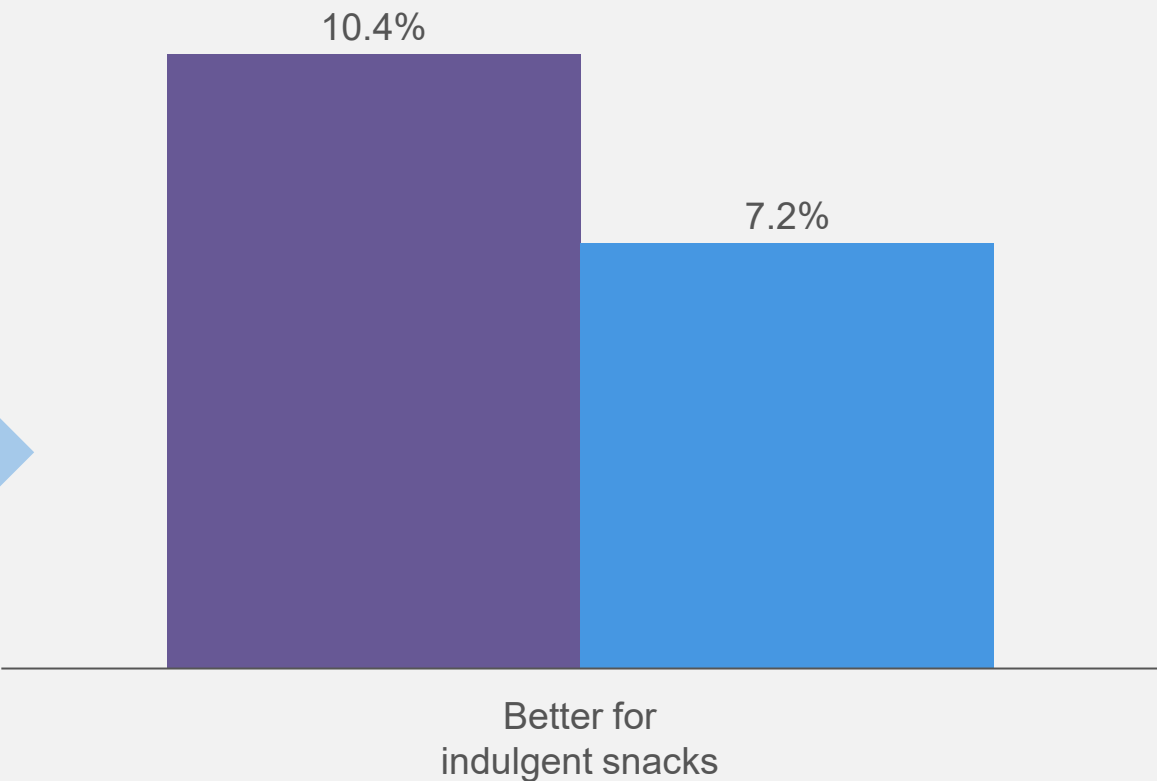


Source: NIQ, RMS, Total US Full View + Conv., 52-Weeks Ending 3/28/2026

BetterFor™ indulgent is outpacing healthy

Sales Performance

Dollar % Chg. Unit % Chg.

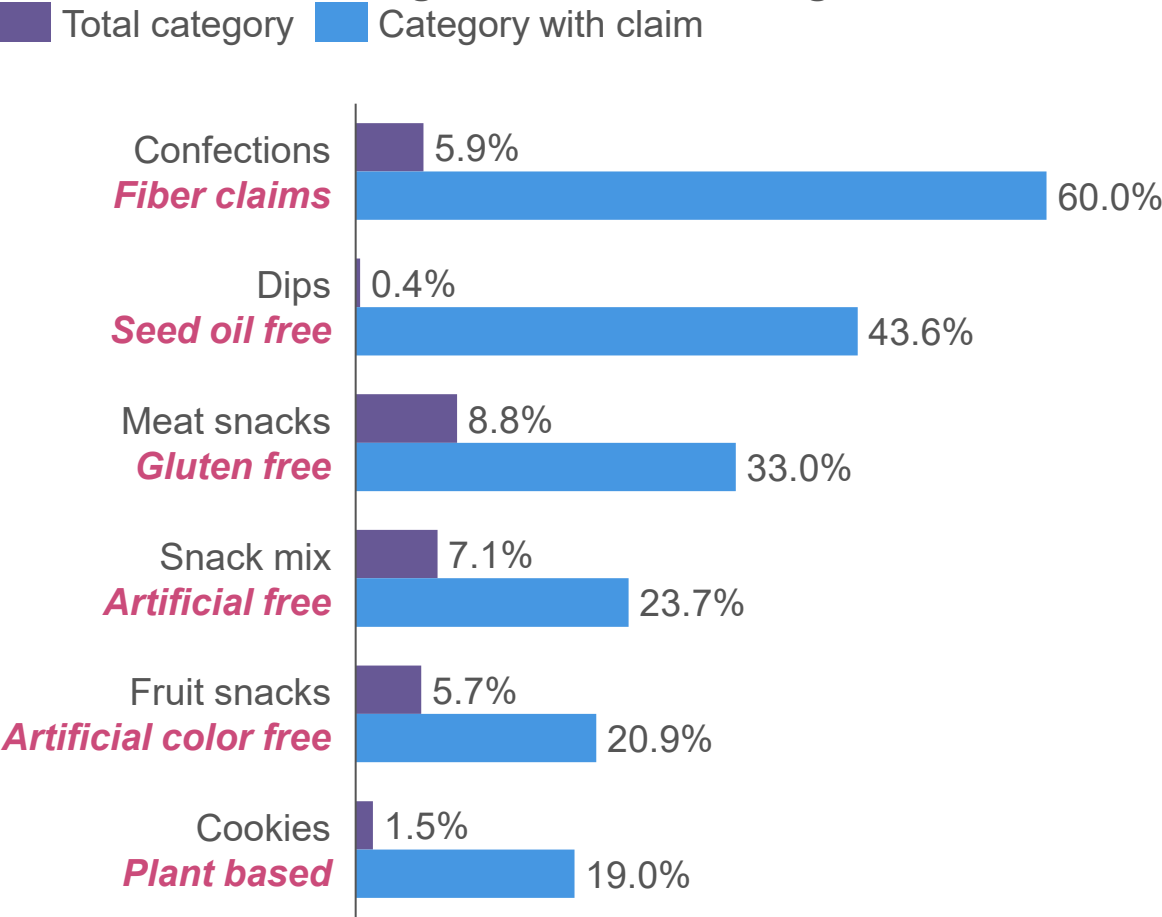


Source: NIQ, RMS, Powered By Product Insights, Stated Claims, Total US Full View + Conv., 52-Weeks Eding 3/28/2026



BetterFor™ claims matter to shoppers

Dollar Sales % Change Based On Package Claims

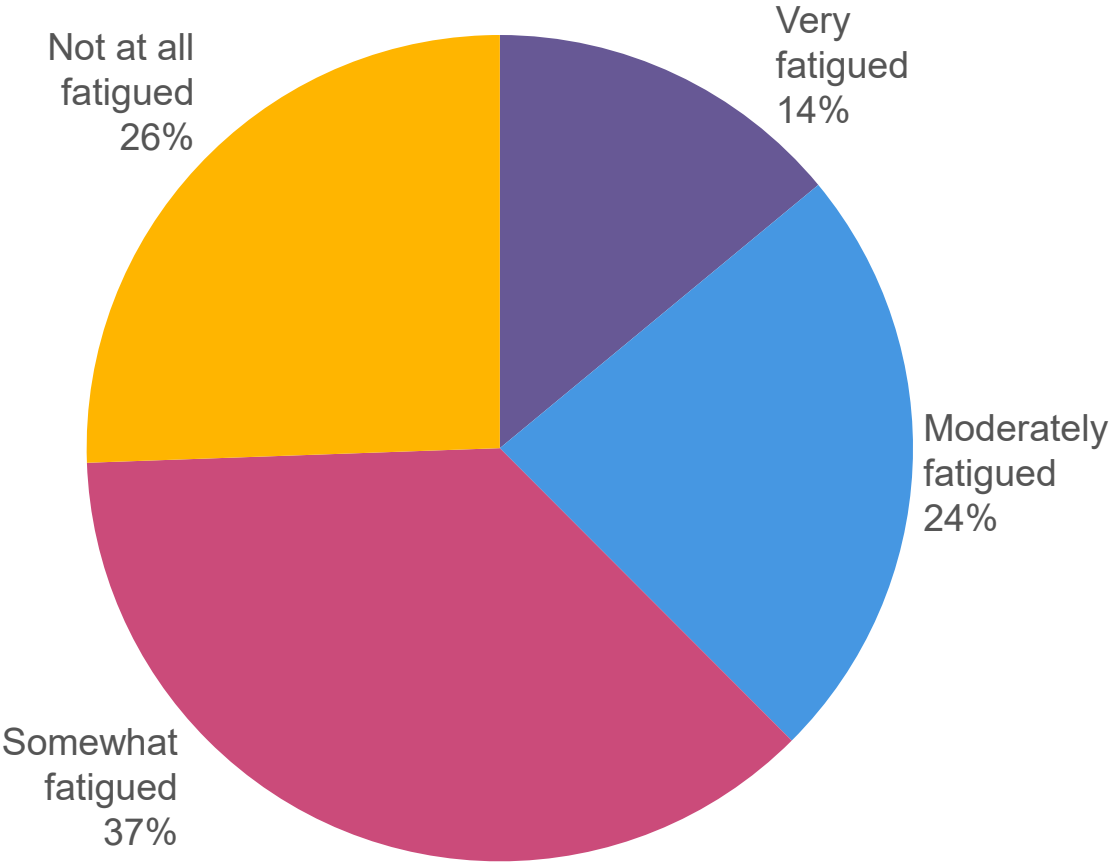




Decision pressure
has shoppers
looking for
help

Shoppers want help finding affordability

Level Of Fatigue From Constant Search For Deals



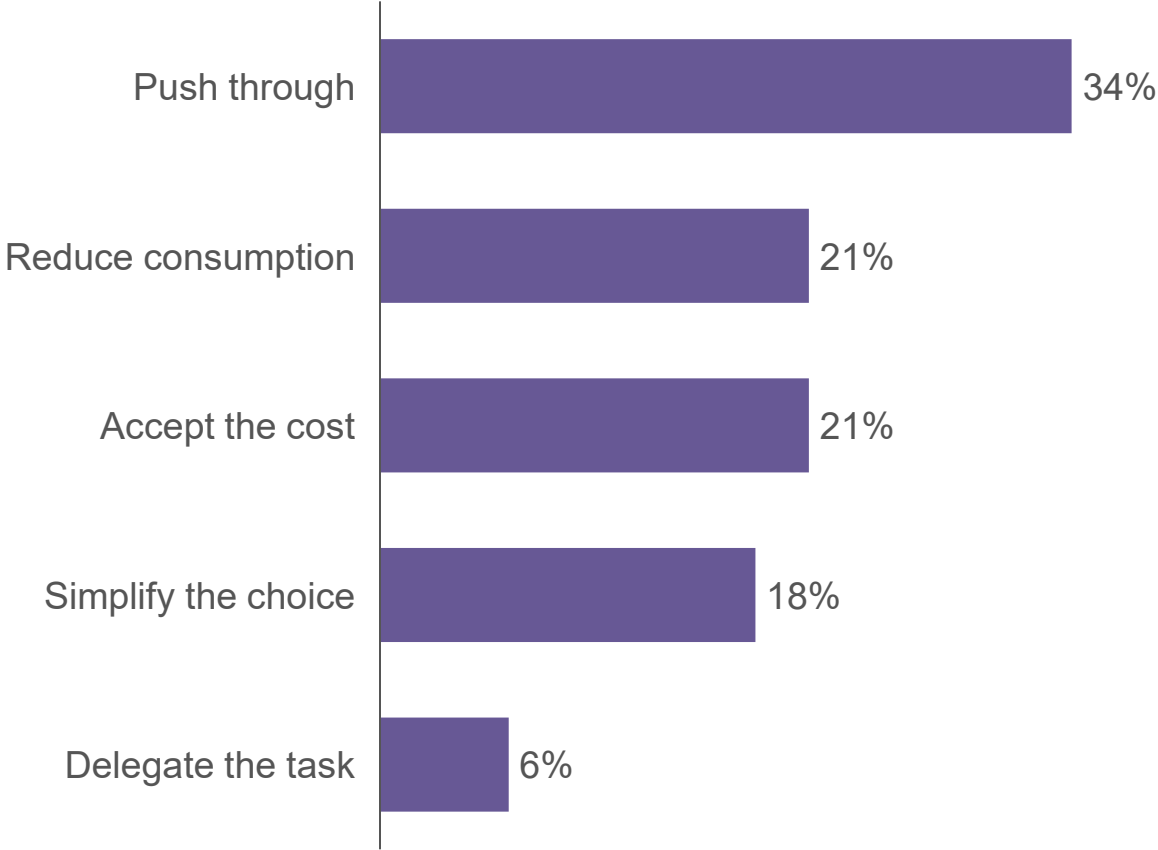
Source: NIQ, BASES Time Crunched Survey, n=1,021, 2025





Some push through, some walk away

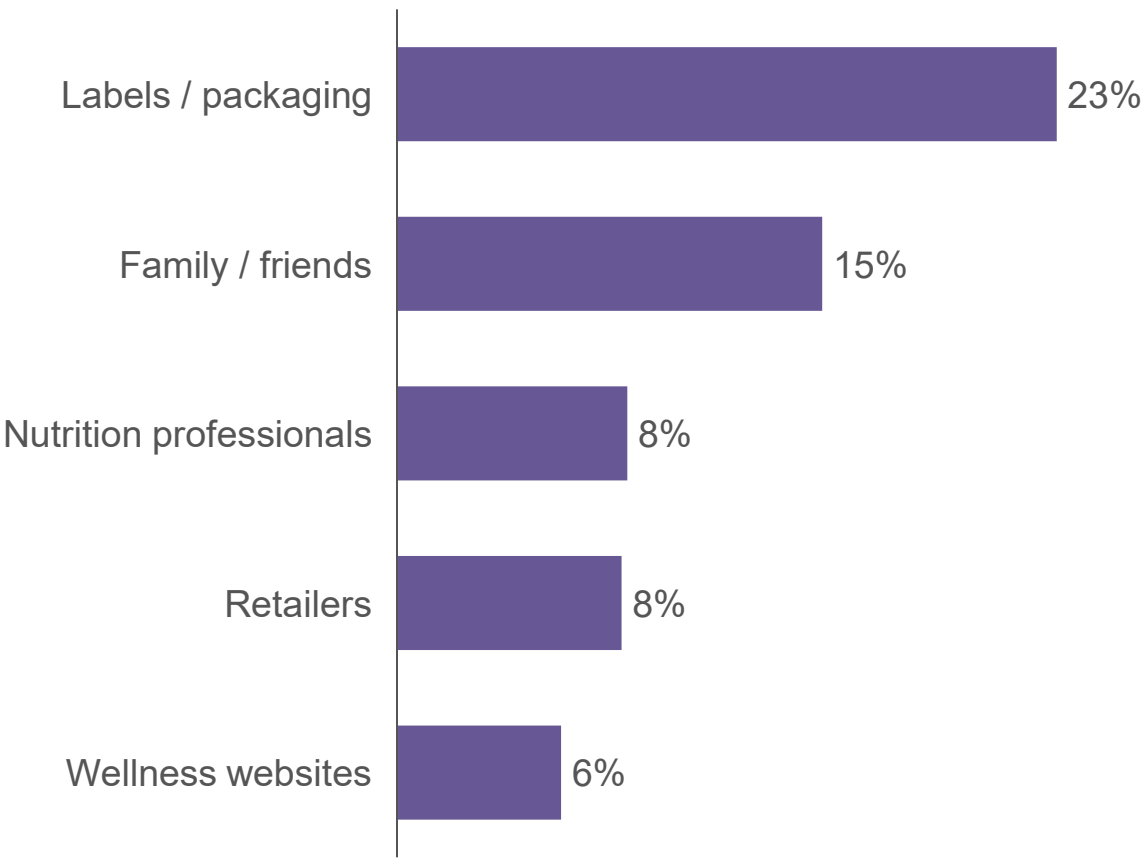
Methods For Responding To Deal Searching Fatigue
Among Those Who Are Fatigued From Deal Searching



Source: NIQ, BASES Time Crunched Survey, n=1,021, 2025

Brands still control the narrative with labels

Most Trusted Sources For Information About Snacks



Source: NIQ, BASES Snacking Survey, n=2,009, 2026

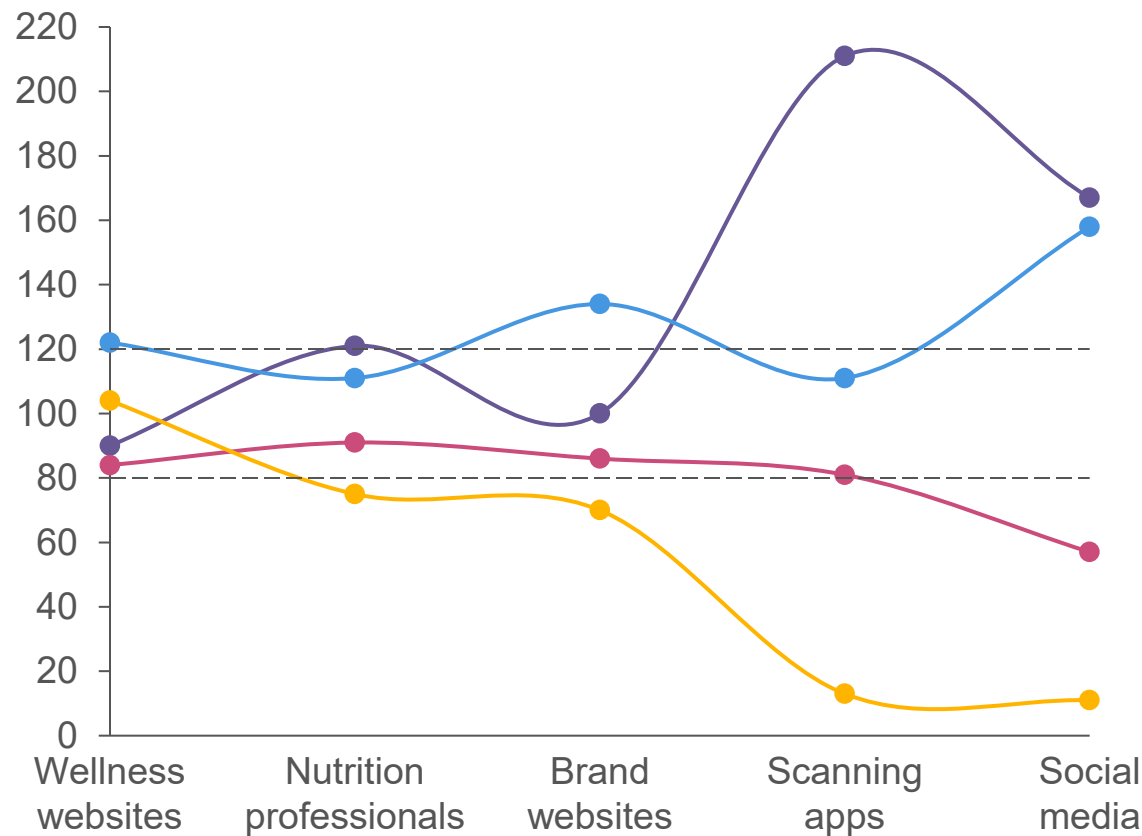


Who controls the narrative is changing

Trusted Source, By Generation

Indexed To Total Respondents

Gen Z Millennials Gen X Boomers



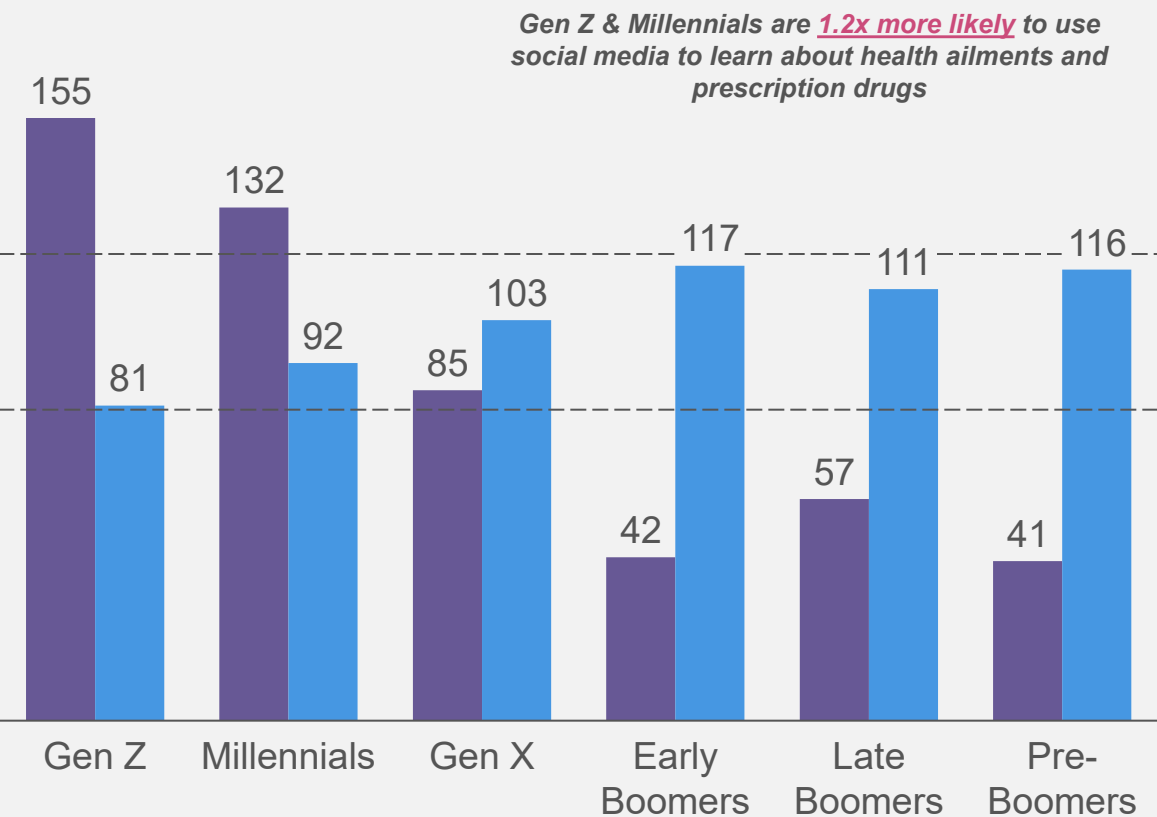
Source: NIQ, BASES Snacking Survey, n=2,009, 2026

Social media is a trusted source

Compared To Other Sources, I Am More Likely To Trust Social Media For Information

Indexed To Total Respondents

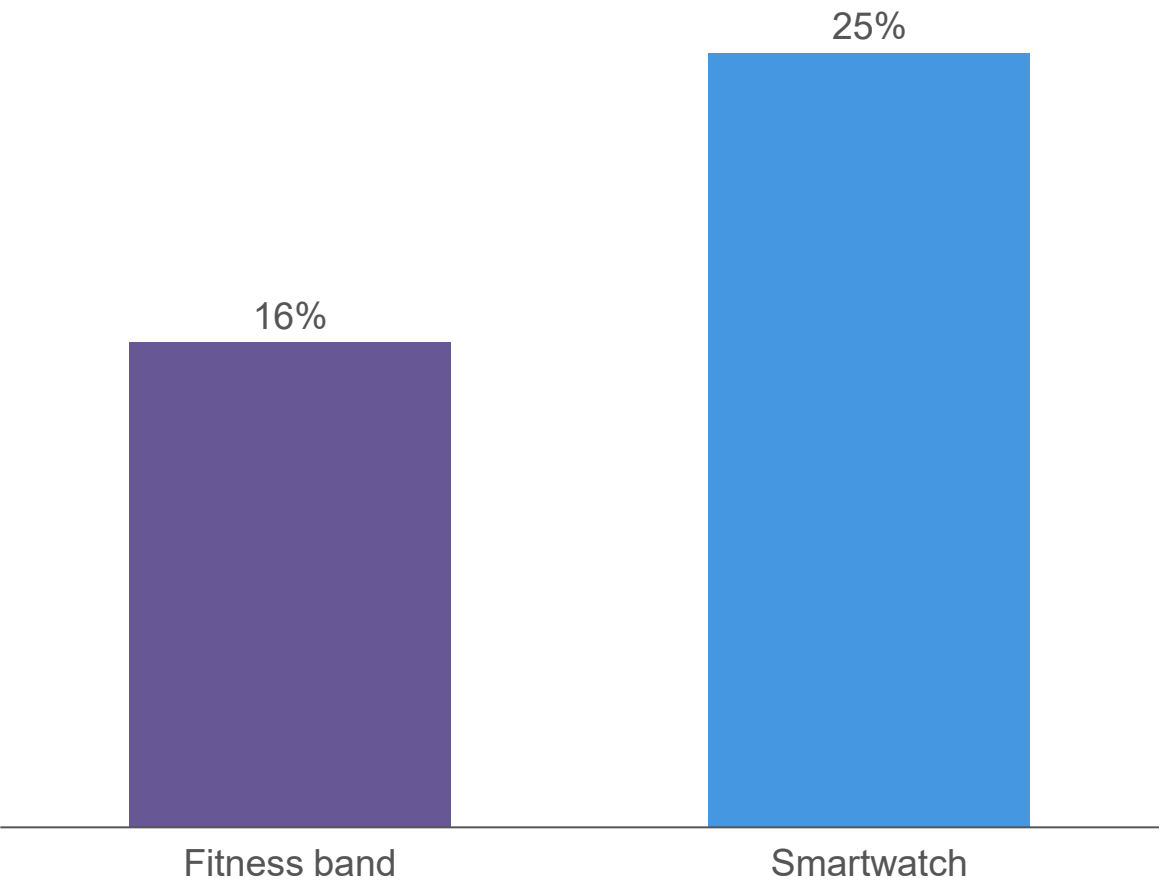
Agree Disagree



Source: NIQ, Spectra, 2025 Census Adult Population, US, Accessed April 28, 2026

Shoppers are turning to tech for help

Personal Tech Device Usage

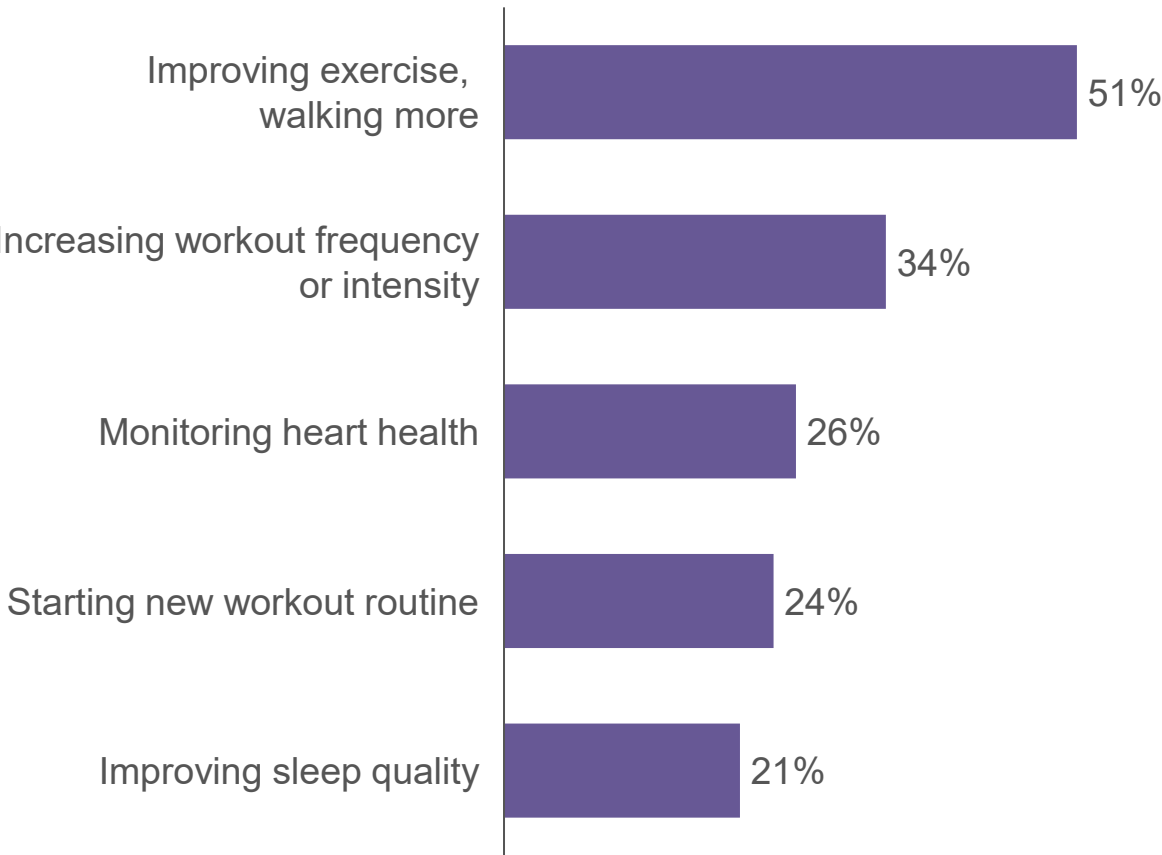


Source: NIQ, Consumer Life, 2025; NIQ, BASES Wearables Survey, n=1,002, December 2025



Wearables help with fitness

Fitness Changes Since Adding A Wearable
Among Those Using A Wearable



Wearables help with nutrition

Consumption Changes Since Adding A Wearable
Among Those Using A Wearable



Source: NIQ, BASES Quick Question Omnibus Survey, n=1,002, December 2025

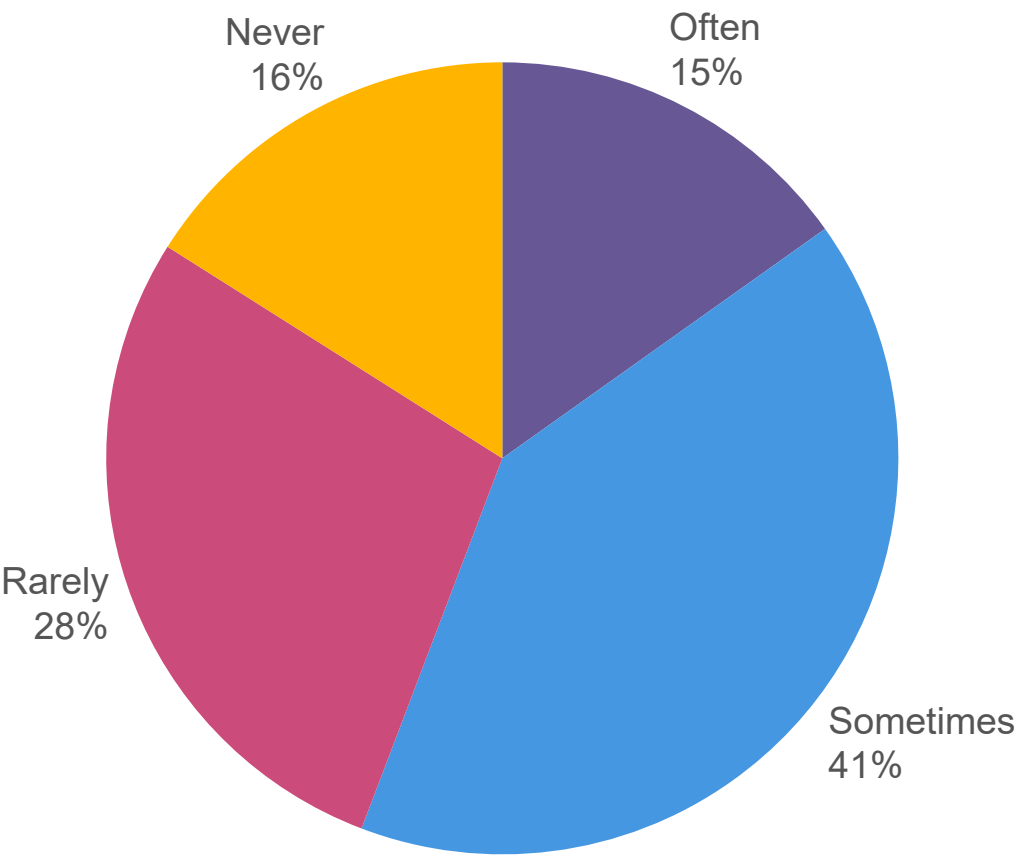
An aerial photograph of a winding asphalt road with yellow and white lane markings, curving through a dense green forest. Mist or low clouds are visible in the lower right portion of the image, partially obscuring the road and trees.

**When a shopper seeks help,
the first place they look
matters**



Social media is helping shoppers discover

Frequency Of Food/Beverage Discovery On Social Media
Among Those Who Use Social Media



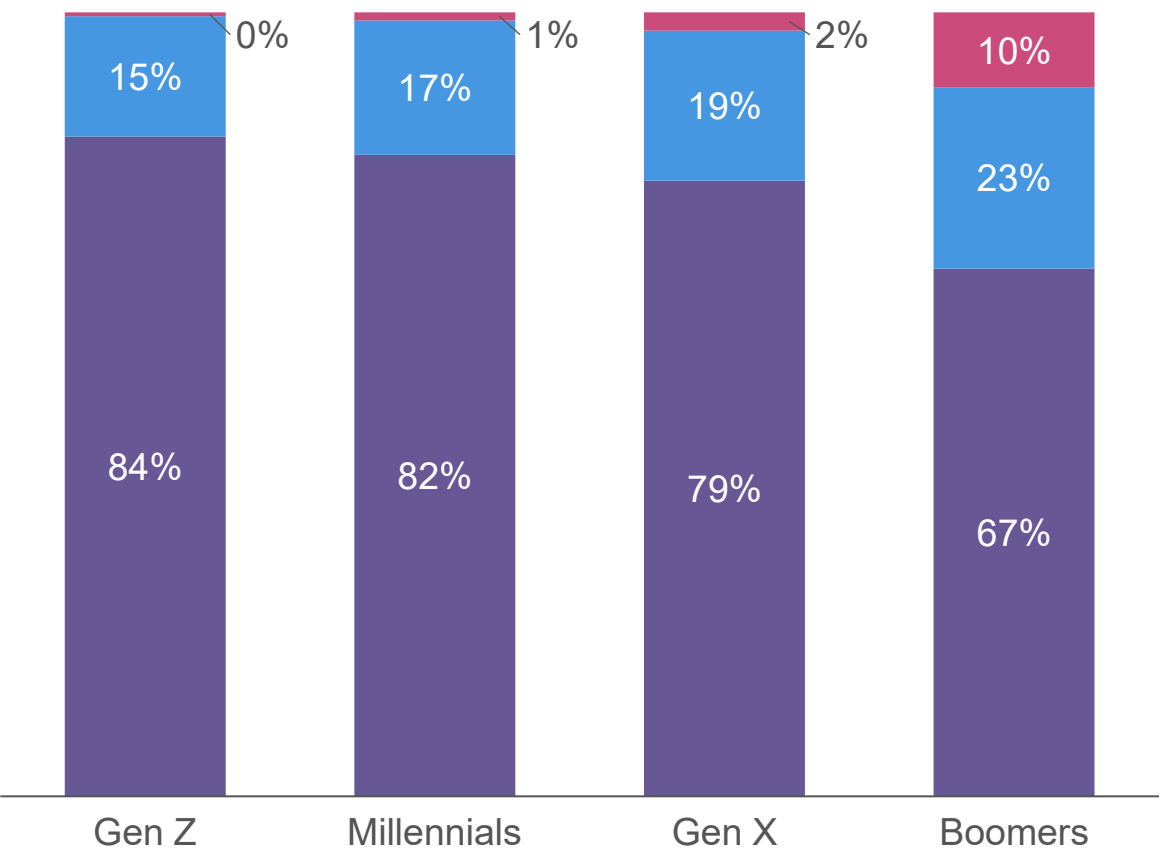
Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026

It's not just Gen Z

Frequency Of Food/Beverage Discovery On Social Media

Among Those Who Use Social Media, By Generation

Sometimes or often Rarely Never



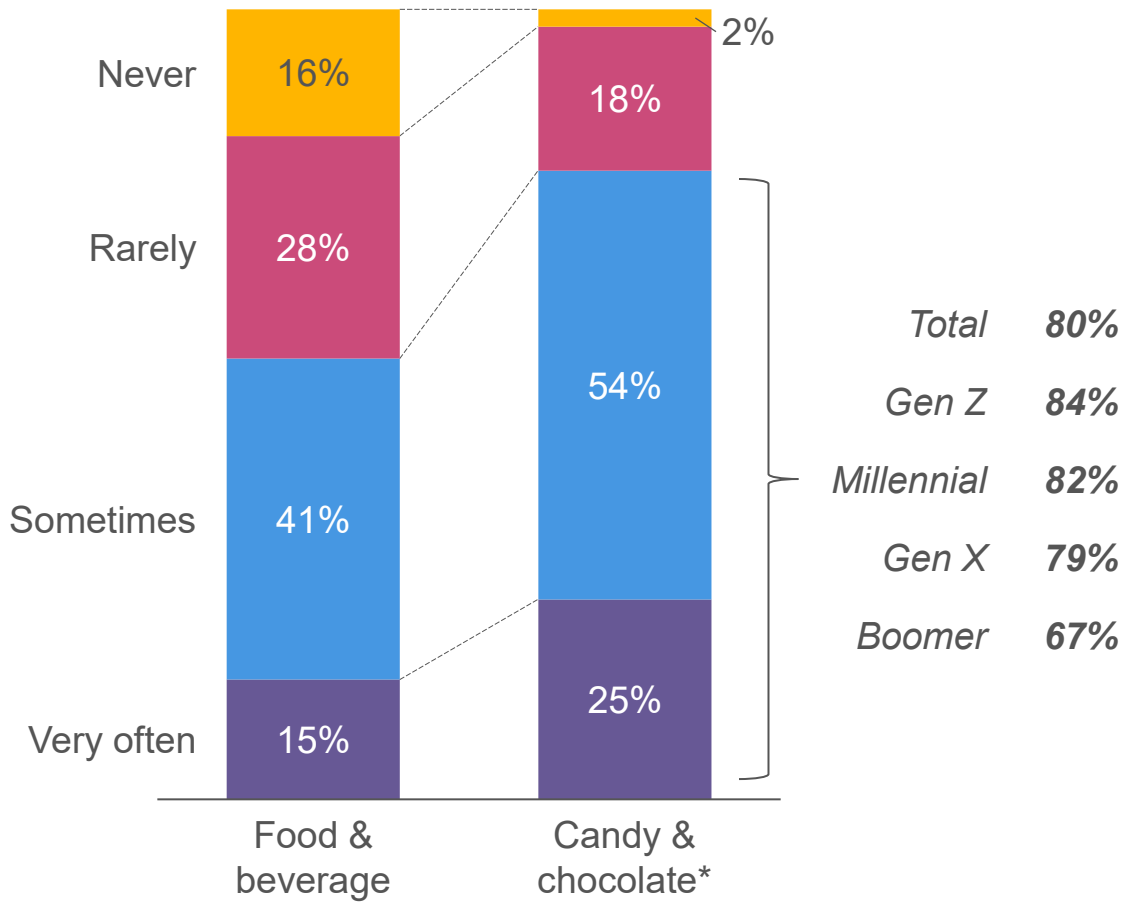
Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026





Social discovery works harder for confection

Frequency Of Social Media-Driven Discovery
Among Those Who Use Social Media

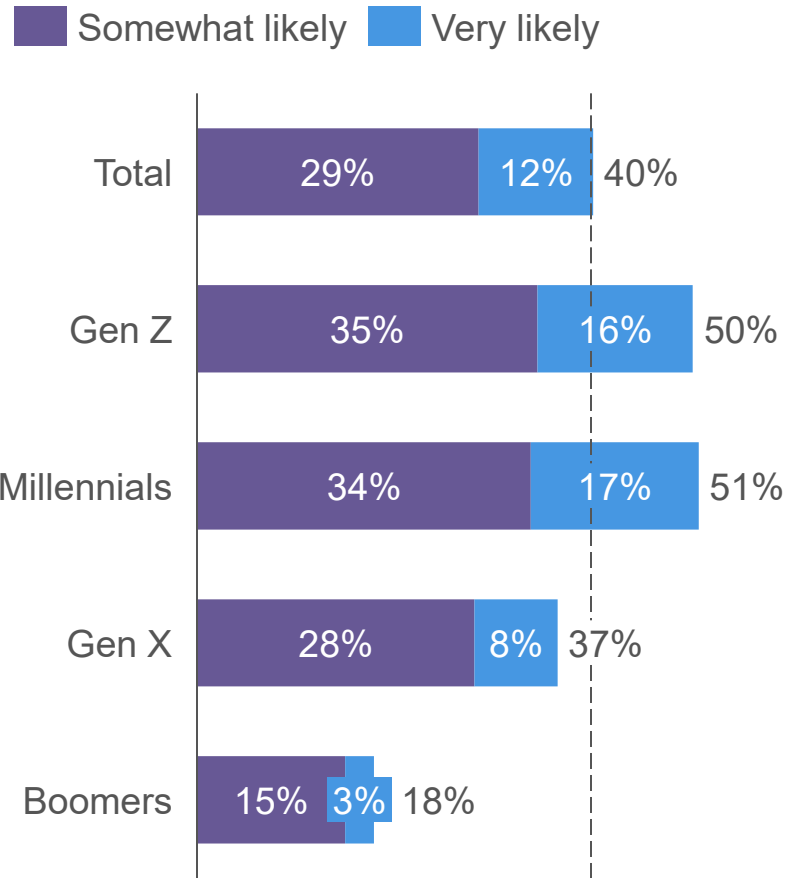


Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026
Note: *Among those who said they sometimes/often discover food & beverage on social media

Social influencers are most-impactful on younger shoppers



Likelihood Of Buying Influencer-Promoted Candy & Chocolate
Among Those Who Use Social Media



Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026

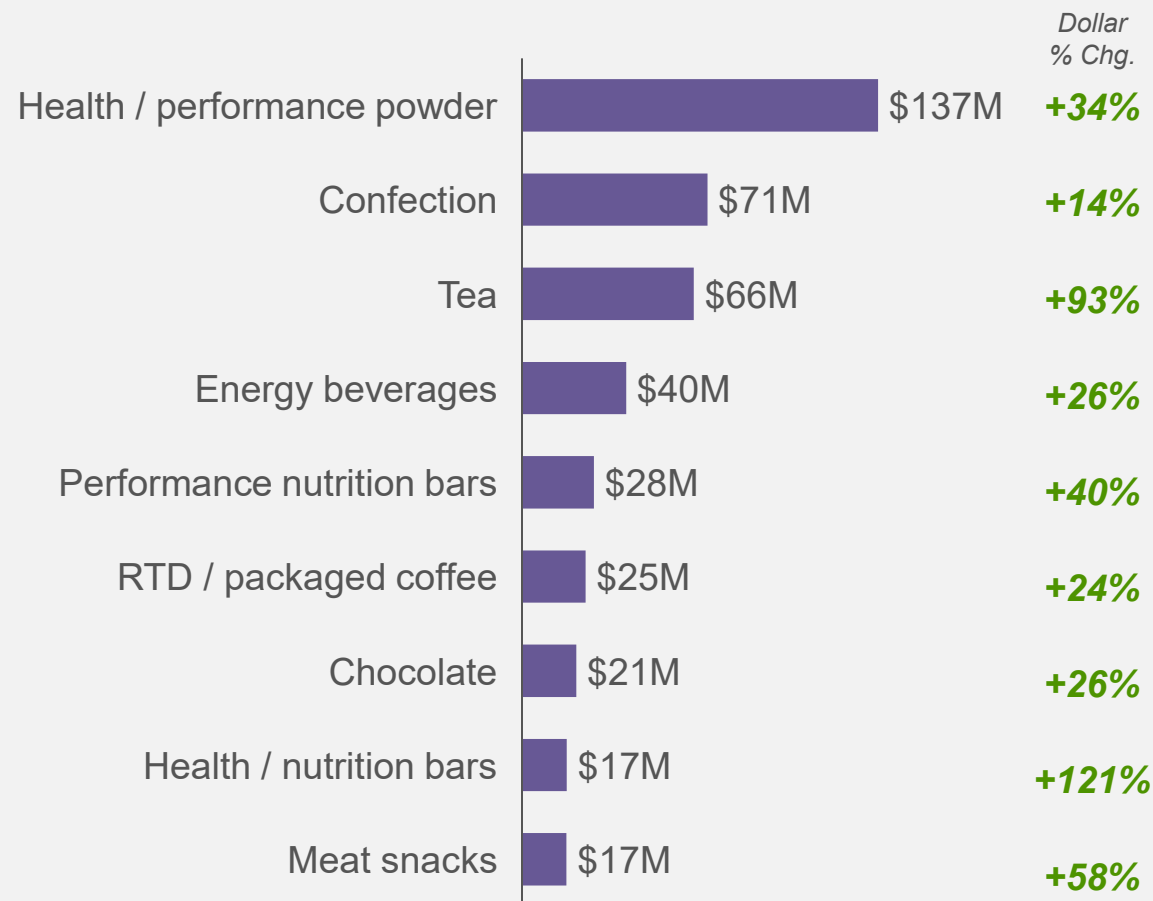
\$647M

food & beverage sales made through TikTok Shop

+29% Vs. YA

Momentum of social commerce is growing

Largest Food Department Categories On TikTok Shop



Source: NIQ, Omnisaies+, Total TikTok, Food Department, 52-Weeks Ending 3/28/2026

Brands not available in-store drive \$50M+ on TikTok Shop



Free & fast shipping are leading motivators

Motivators To Buying Candy/Chocolate On Social Media



Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026



Fraud & counterfeits are leading barriers

Barriers To Buying Candy/Chocolate On Social Media



Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026





Influence Gen Z with what matters to them

Exclusivity & Buzz

Exclusive drops

Limited-time mashups

Mystery flavors

Crowd-voted favorites

Personalization & Credibility

Customizable mix

Small-batch

Allergen profile

Demos / tastings / unboxings

Ease & Access

Fast shipping

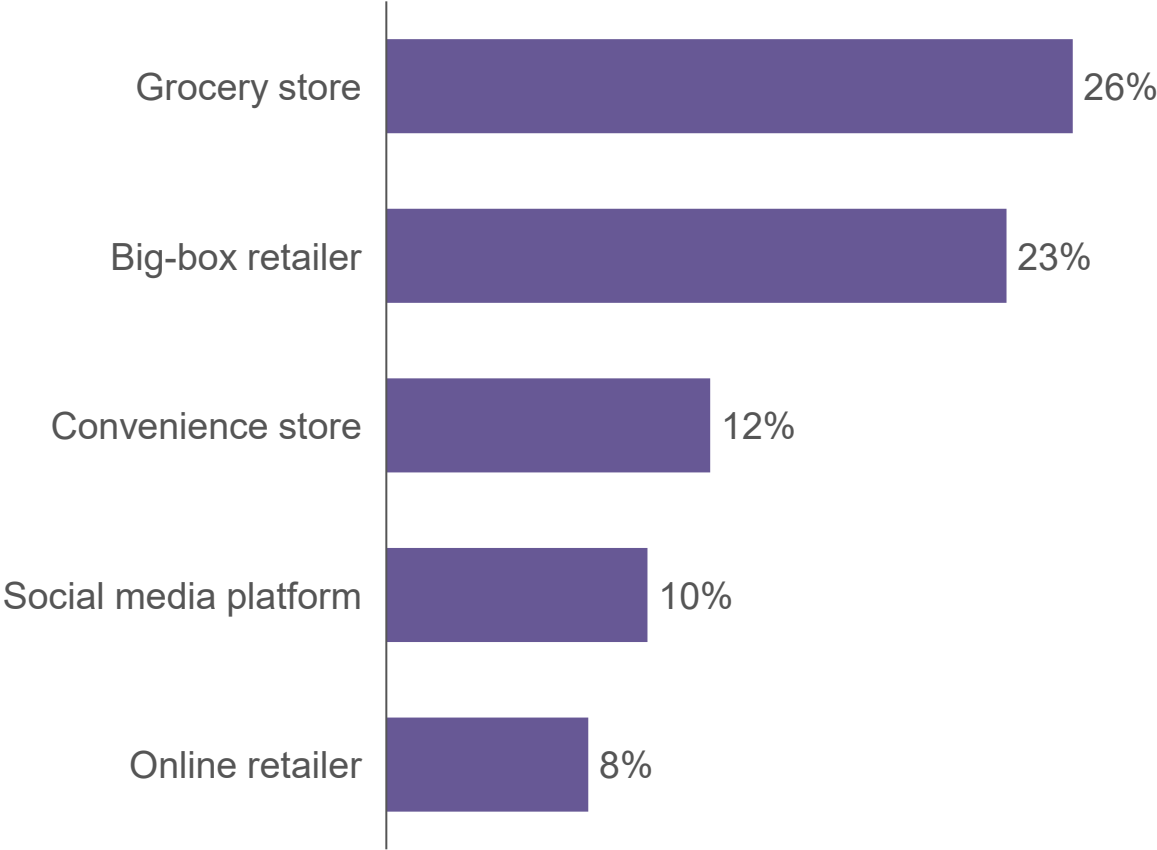
Subscription options

Source: NIQ, BASES Social Commerce Survey, n=2,006, January 2026



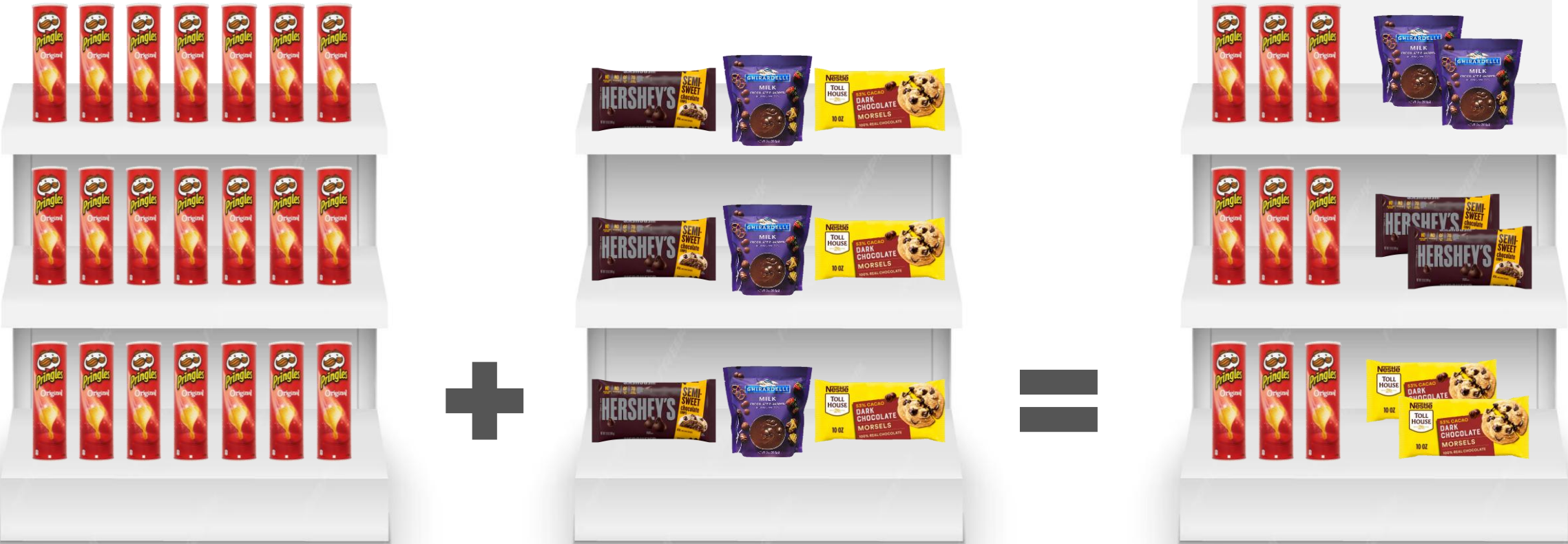
Retailers don't need every viral SKU

After Discovering A New Candy Or Chocolate On Social Media, Where Is The First Place You Would Shop For It?



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

Retailers do need to think differently and act quickly though



Online impulse buying works differently

Social commerce is
today's online

**impulse
aisle**





Discovery

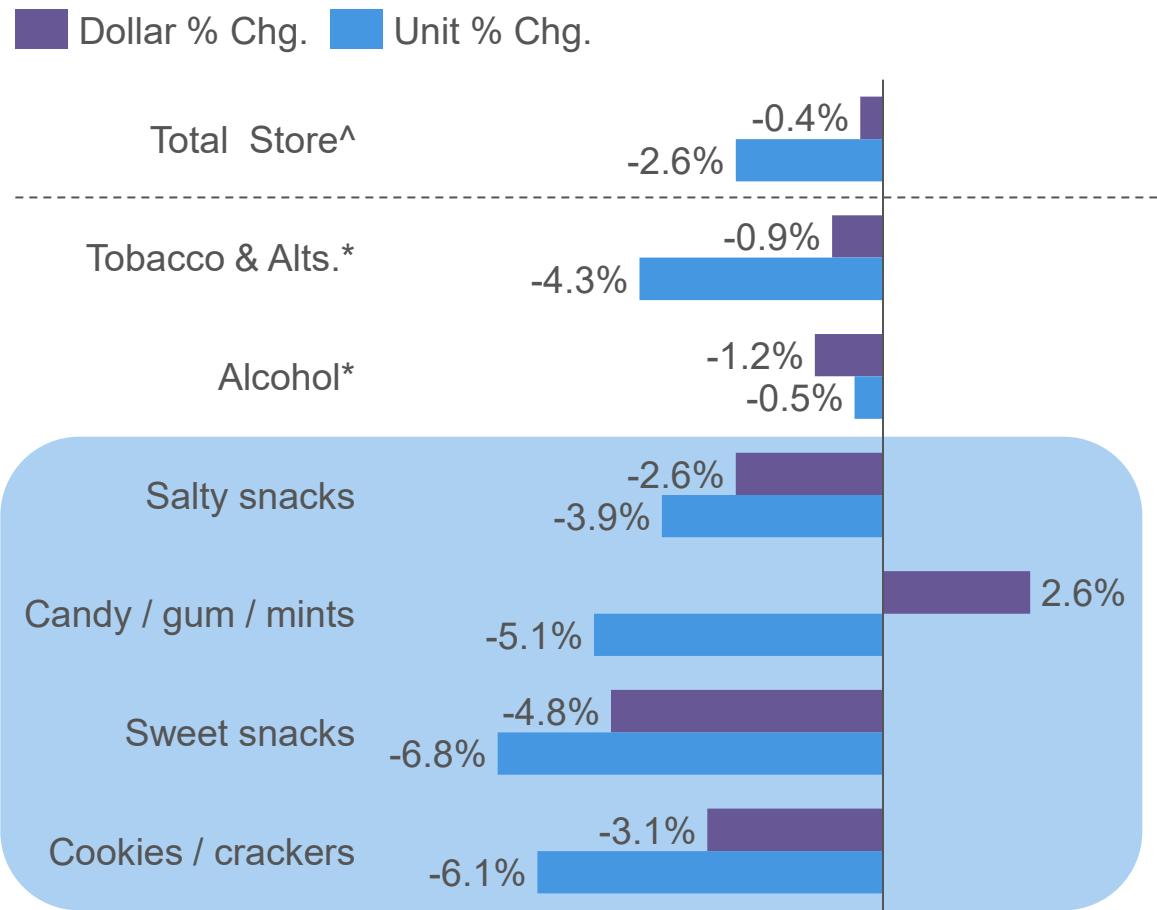
Curiosity

Intent

Retail

Convenience channel is an impulse channel

Convenience Channel Sales Performance



Source: NIQ, RMS, Total US Convenience, 52-Weeks Ending 3/21/2026
Note: ^Total Store, *Department level, all others are Super-Category level



C-store shoppers are cutting back

33%

of those who shop C-stores
for food, beverages, or
nicotine are doing so less
often now



Source: NIQ, BASES C-Store Survey, n=2,006, 2025

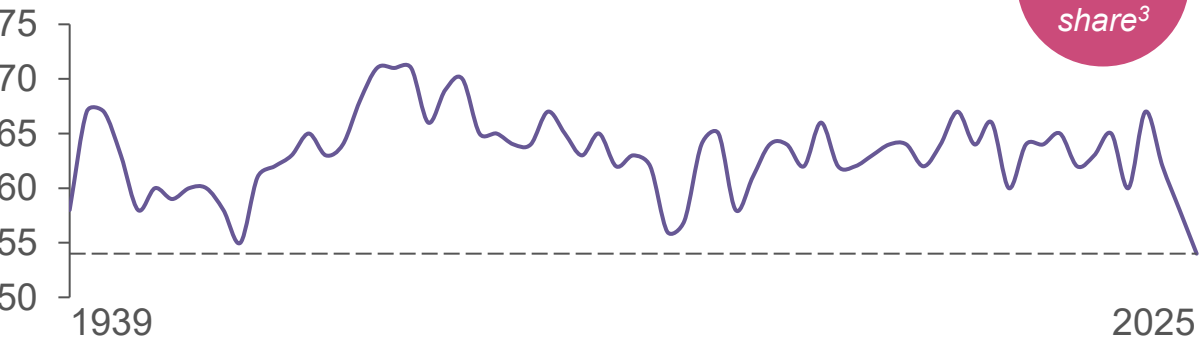
Anchors are partly to blame



Anchor categories in the convenience channel are losing relevance

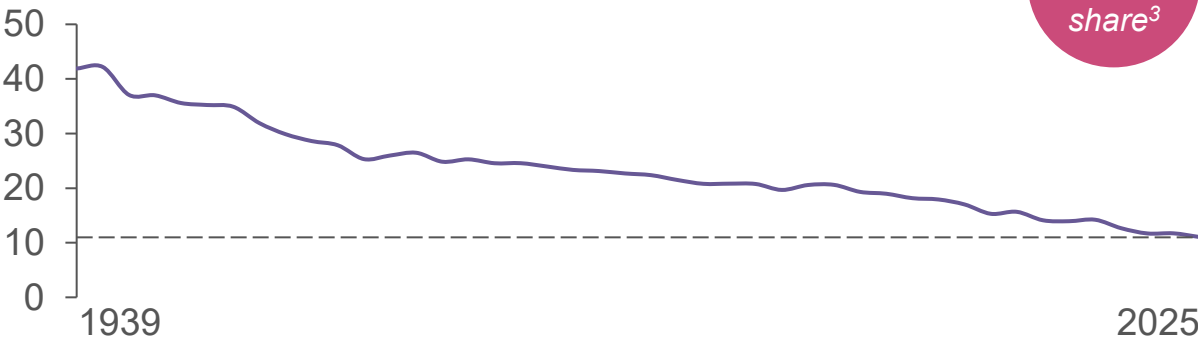


American Alcohol Consumption¹



38%
FMCG \$
share³

American Cigarette Usage²



18%
FMCG \$
share³

Source: ¹Gallup. Americans' Use of Alcoholic Beverages, 1939–2025. Gallup Consumption Habits Survey. Accessed <https://news.gallup.com>, Page Updated August 13, 2025, Accessed January 7, 2026; ²American Lung Association. *Trends In Cigarette Smoking Rates*. Analysis Of CDC Data: NHIS 1965-2002; YRBSS 1995-2001. Accessed <https://www.lung.org>, Page Updated May 30, 2024, Accessed January 7, 2026; ³NIQ, RMS, Total US Convenience, 52-Weeks Ending 3/21/2026

C-store tobacco trips are worth \$230M salty snack dollars



% Tobacco Trips With Salty Snacks

5%



Tobacco Trip Salty Snack Spending

\$230M

-0.6% Vs. YA



Salty Snack Spend / Tobacco Trip

\$4.72

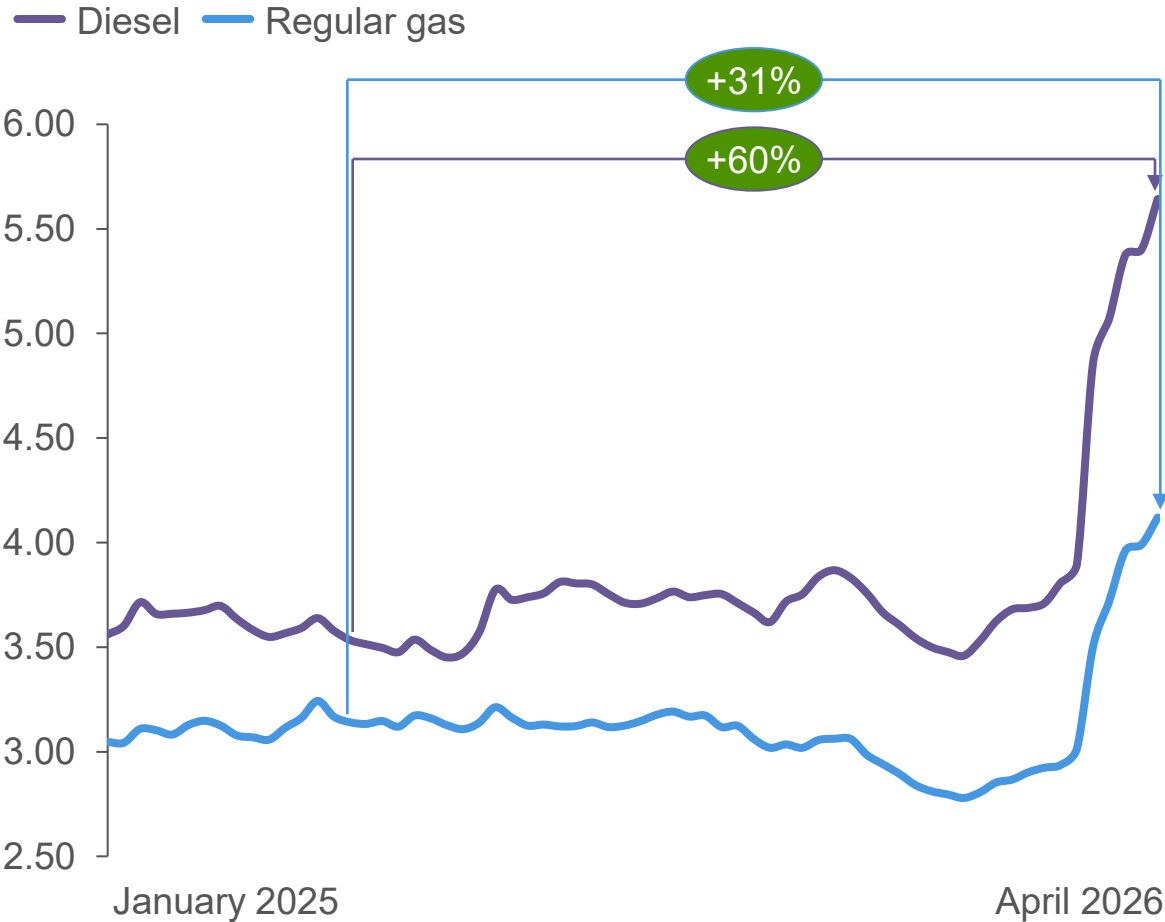
+0.4% Vs. YA

Source: NIQ, Expanded Omnishopper Panel On Demand, Total Store, Total US Conv., 52 Weeks Ending 11/29/25



Gas prices are partly to blame

U.S. Energy Information Administration Fuel Price Trend



Source: U.S. Energy Information Administration (EIA). Gasoline and Diesel Fuel Update. U.S. Department of Energy. <https://www.eia.gov/petroleum/gasdiesel/>, Accessed 4/8/2026

Prices and impulse avoidance are partly to blame

50%

are shopping C-stores less because prices are higher compared to other channels

41%

are shopping C-store less because they are actively trying to limit impulse purchasing

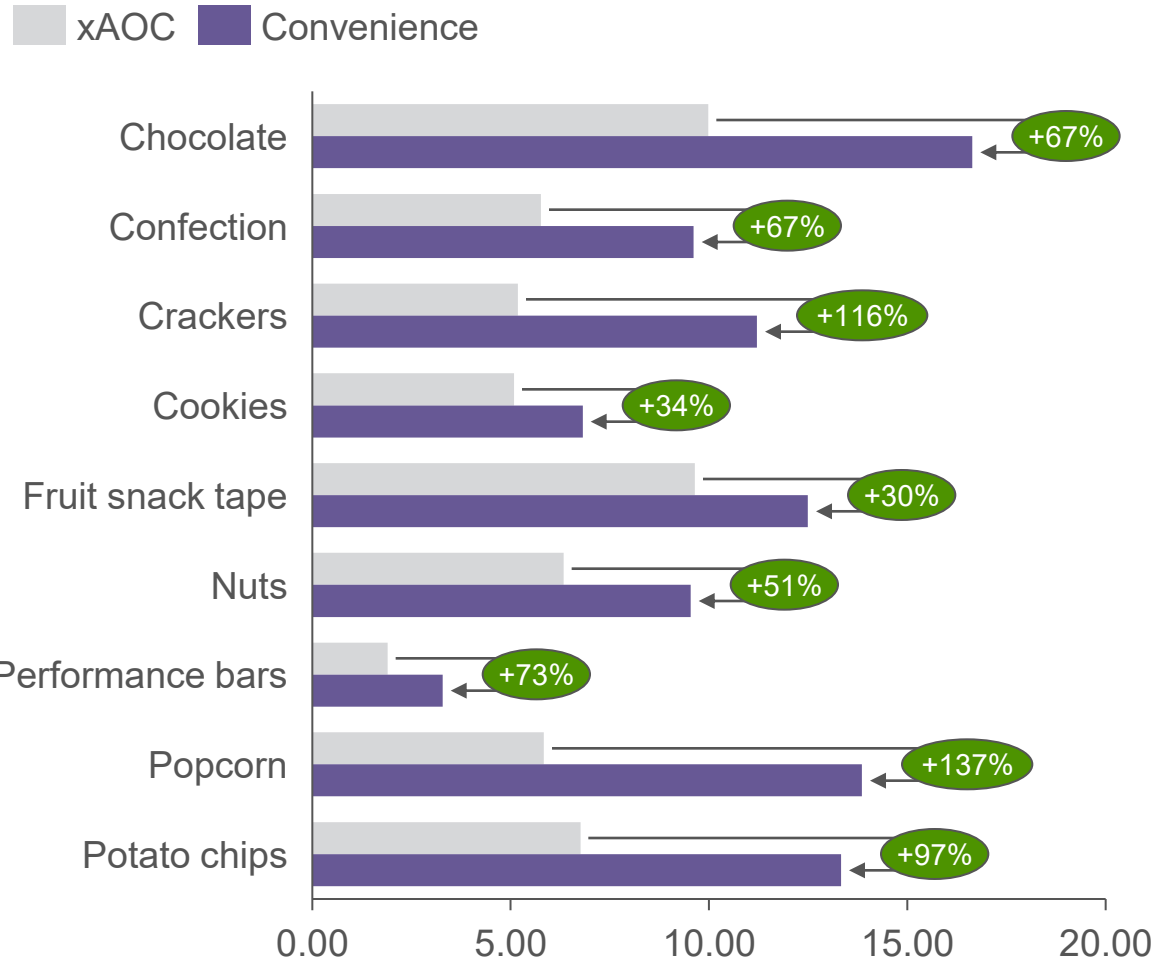


Source: NIQ, BASES C-Store Survey, n=2,006, 2025



Shoppers aren't wrong, c-stores cost more

Price Per EQ, Total US xAOC Vs. Convenience



Source: NIQ, RMS, Total US xAOC Vs. Total US Convenience, 52-Weeks Ending 3/21/2026

Consumers taking control of their wellness is partly to blame



Improve Health & Wellness In 2026¹

58%



Eat Healthier In 2026¹

47%



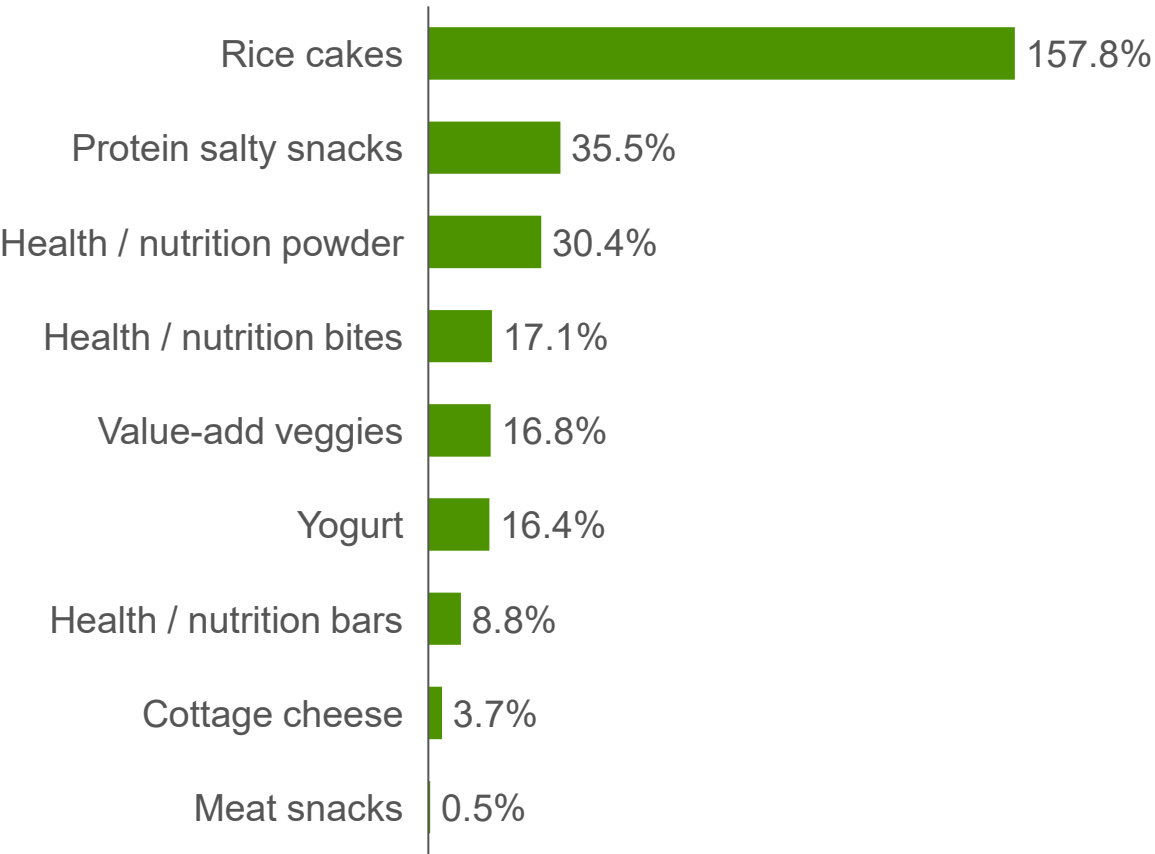
Shopping C-Stores Less To Buy Healthier Items Elsewhere²

16%

Source: ¹NIQ, BASES Quick Question Survey, n=1,002, December 2025 Vs. n=2,006, February 2026; ²NIQ, BASES C-Store Survey, n=2,006, 2025

C-stores have fast-growing healthy snacks

Healthy Snack Dollar Performance In Convenience

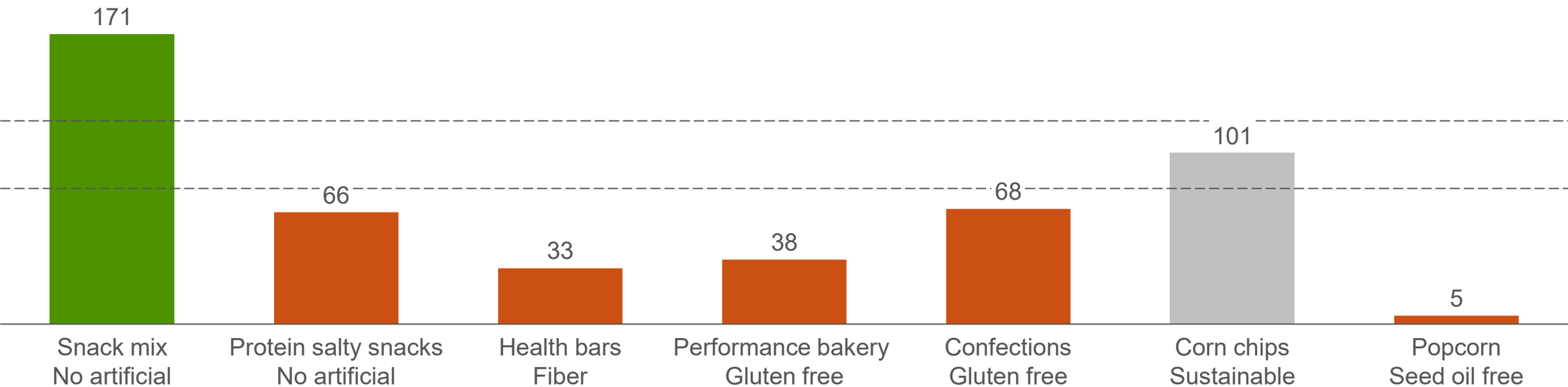


Source: NIQ, RMS Excl. Non-UPC, Total US Convenience, 52-Weeks Ending 3/28/2026



C-stores have assortment work to do when it comes to claims that matter to shoppers

Product + Claim Development Index, Convenience Channel Vs. Total US



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%
--------	--------	-------	--------	-------	--------	---------

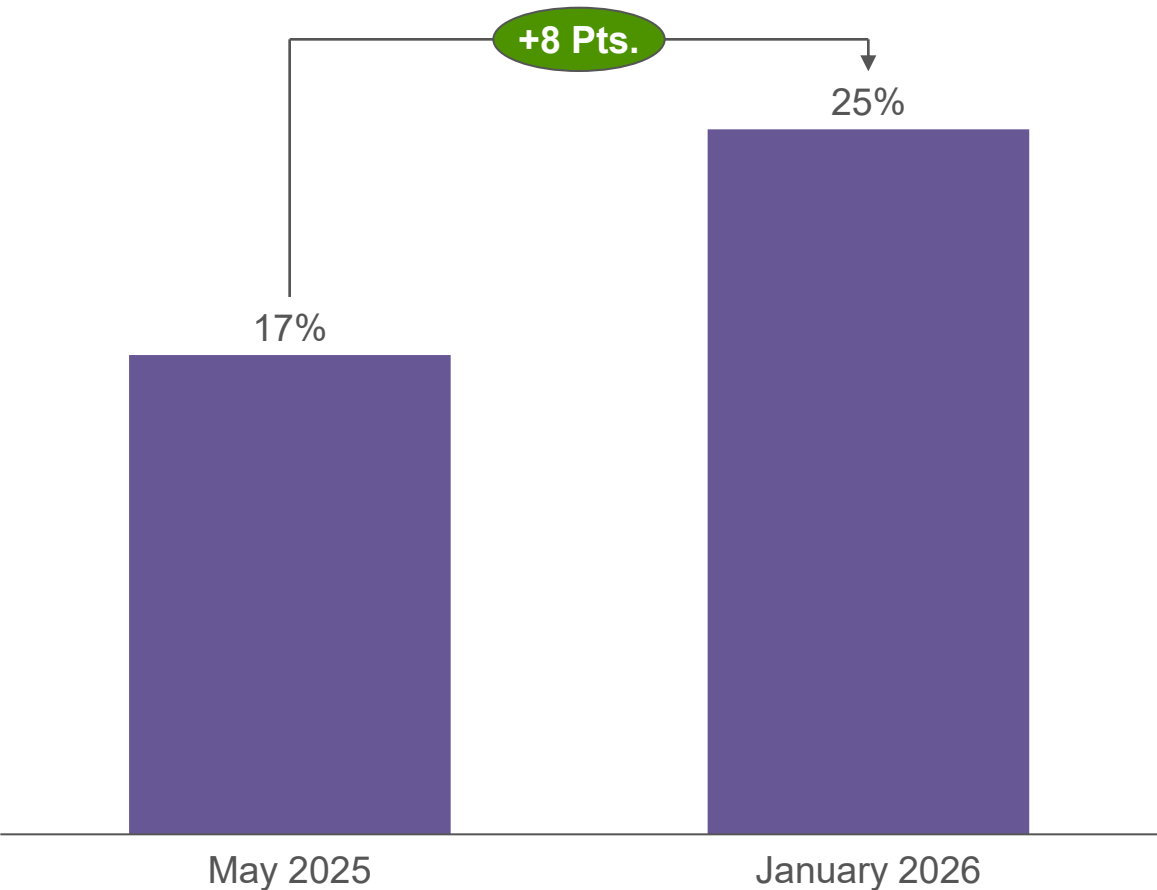
Source: NIQ, RMS Powered By Product Insights, Total US Full View Vs. Total US Convenience, 52-Weeks Ending 3/21/2026

Health and technology are on a collision course



Shoppers are using apps to verify, why?

Use Third Party Scan Apps To Check Ingredients



Source: NIQ, BASES Quick Question Omnibus Survey, n=1,000, May 2025 Vs. n=2,006, January 2026

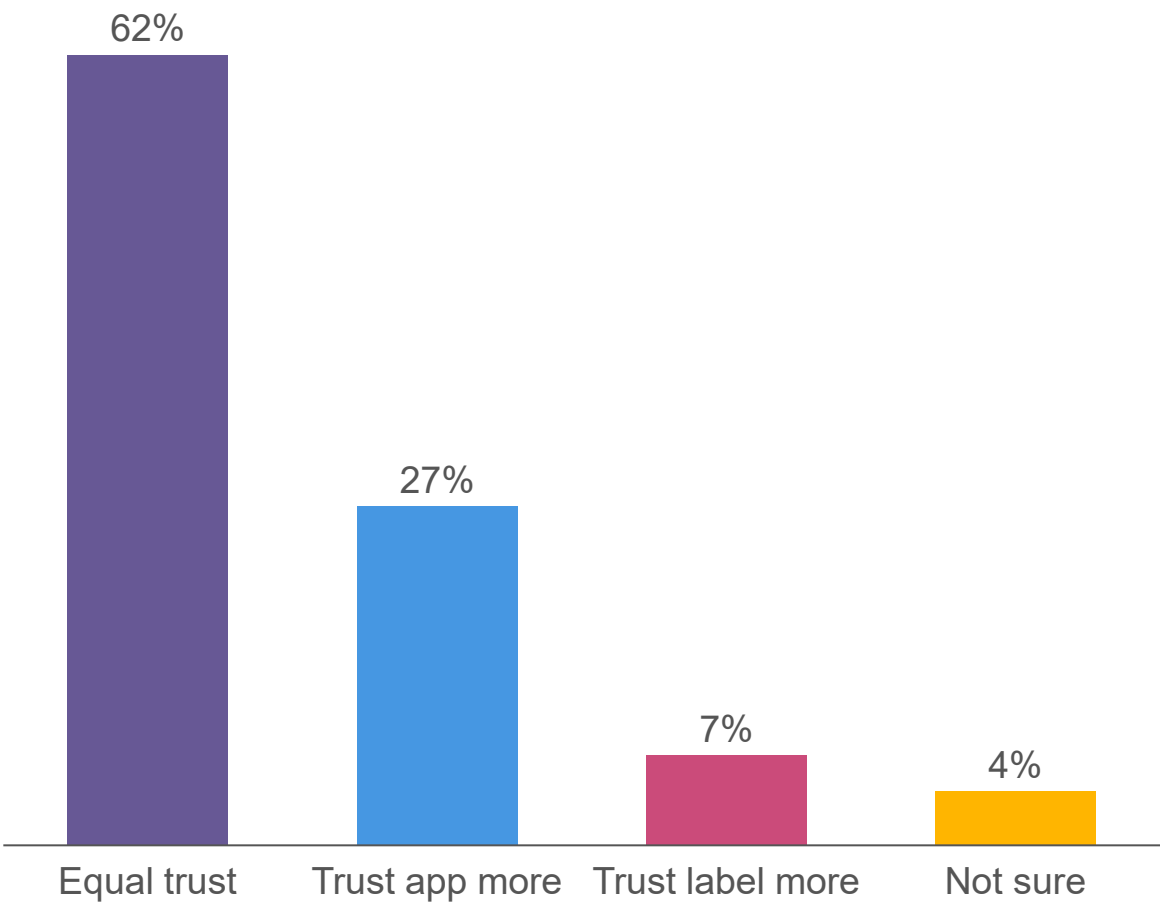
Because they aren't sure about labels

50%

use scanning apps to verify nutritional information shown on a product's package

Apps are shattering trust

Level Of Trust
Among App Users



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

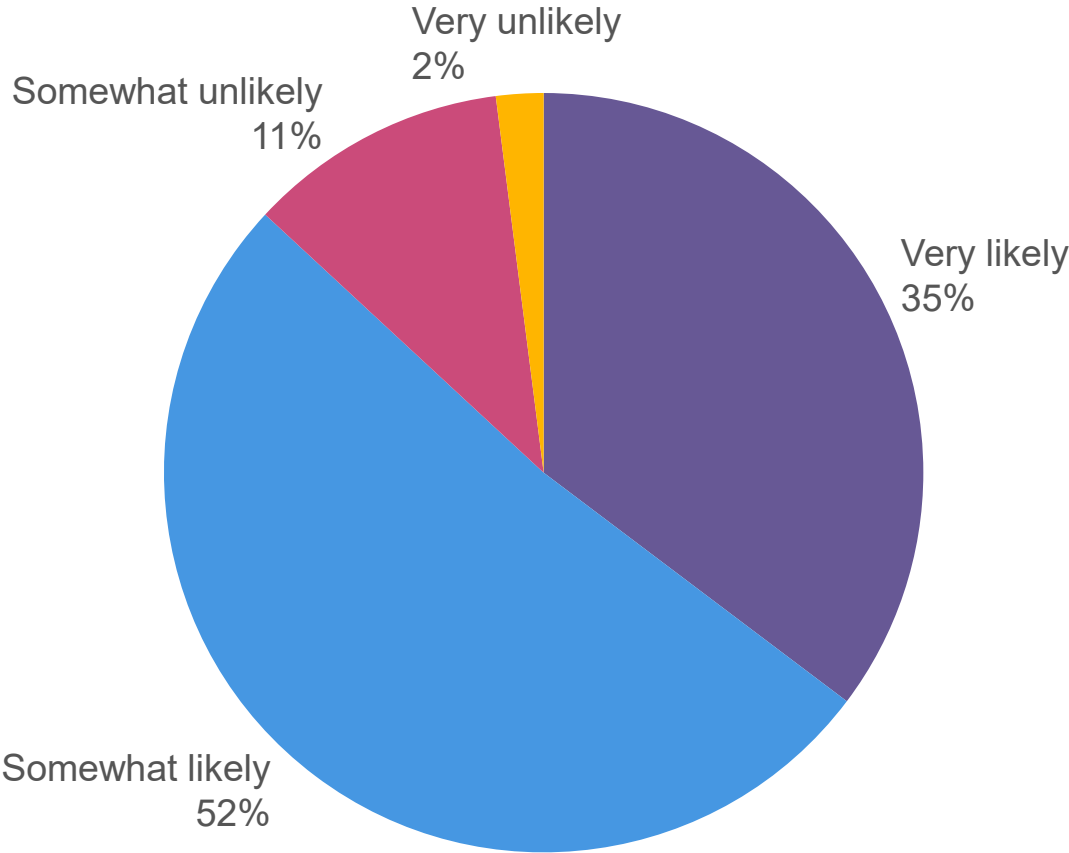




Low scores land products back on the shelf

Likelihood Of Putting A Low-Scoring Or Item Flagged As Containing Artificial Ingredients Back On The Shelf

Among App Users

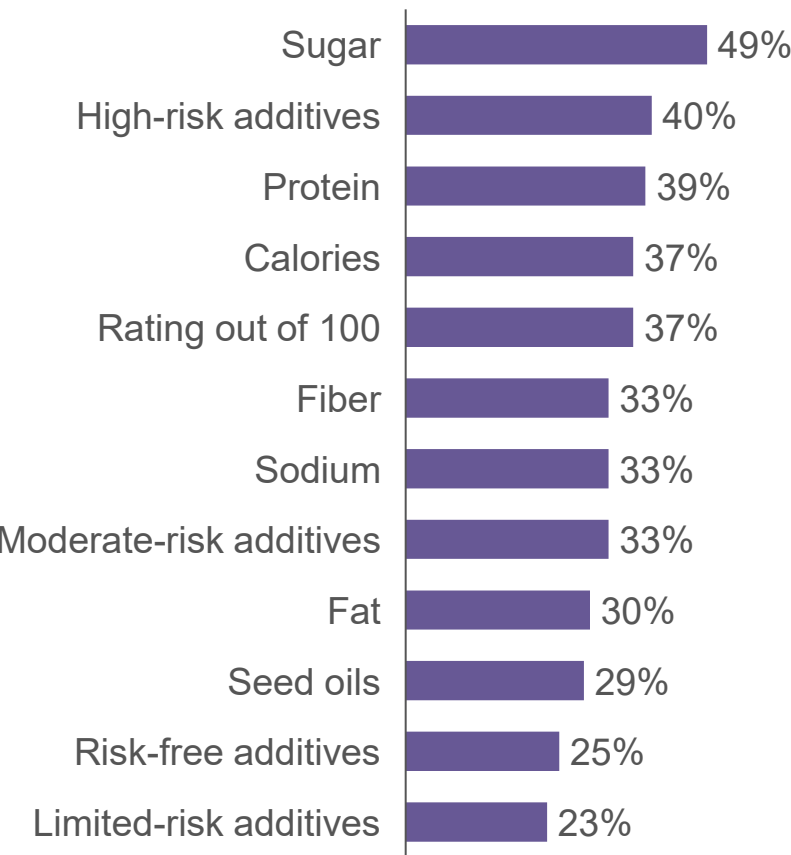


Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

App users are on the lookout when choosing snacks

What Snack Buyers Use Apps To Watch For When Buying Snacks

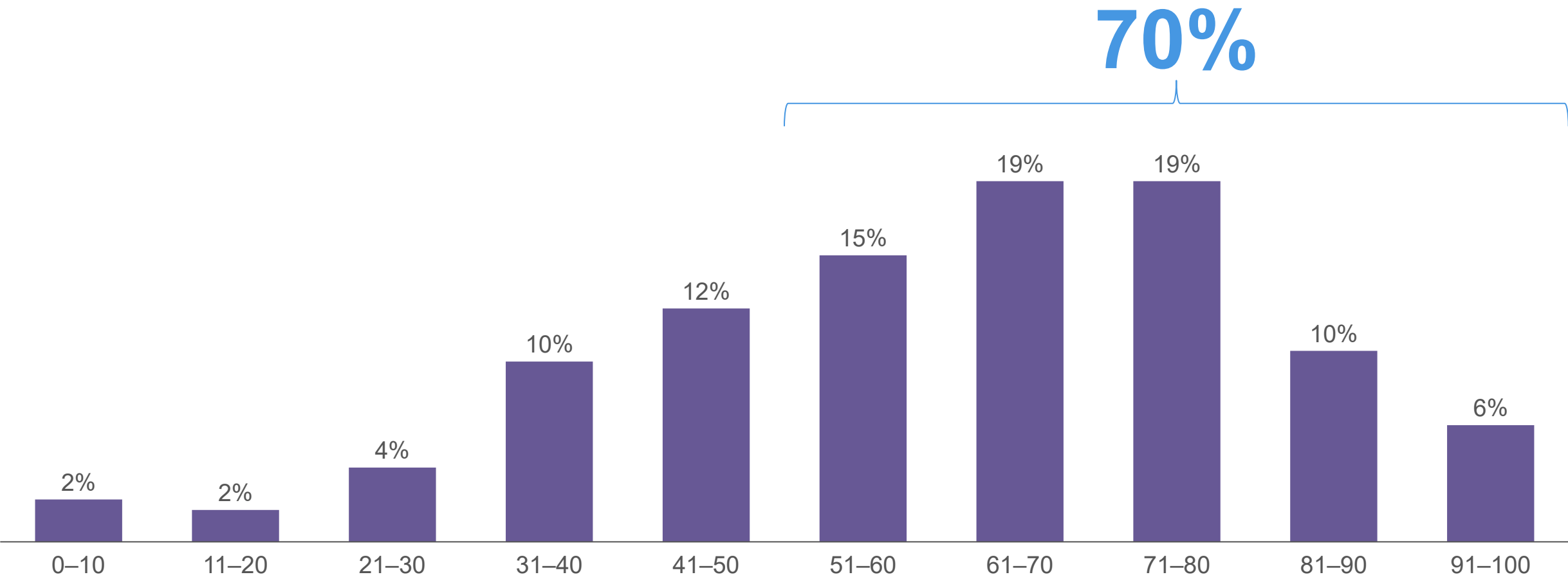
Among App Users



Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Where do your snacks fall?

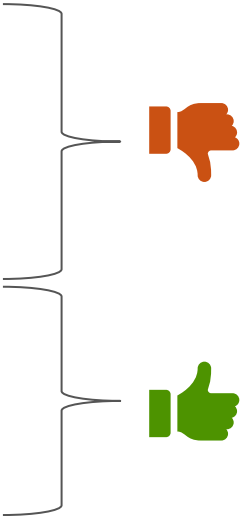
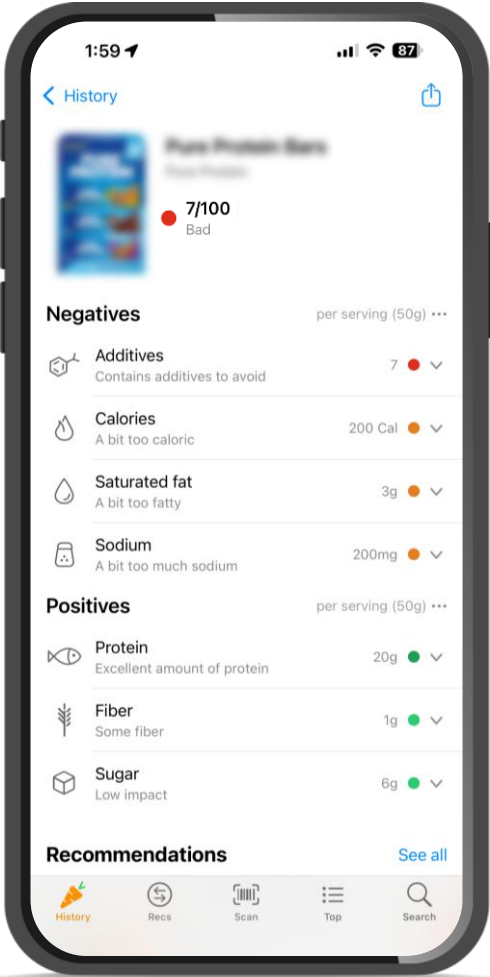
Minimum Score Out Of 100 When Using Apps To Decide Which Snacks To Buy
Among App Users



Source: NIQ, BASES Snacking Survey, n=2,024, 2026

The days of unhealthy “healthy” are numbered

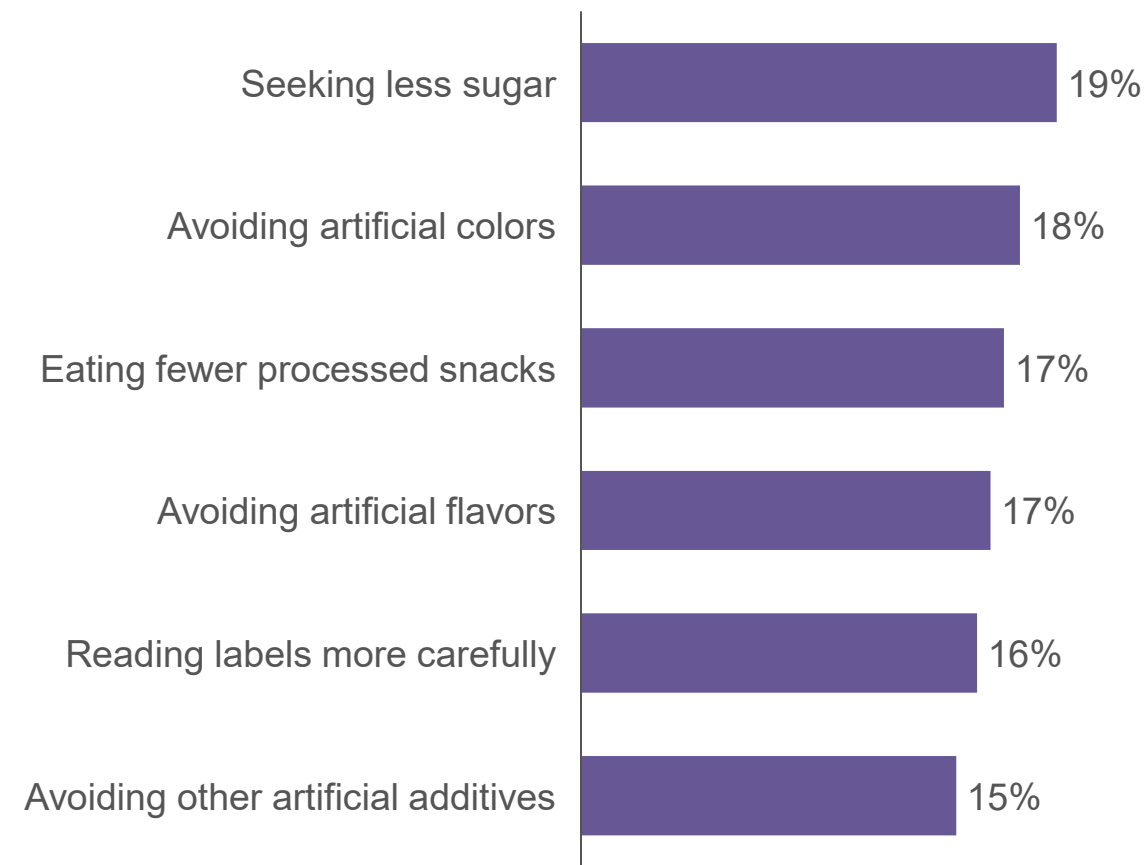
The Protein Bar Brand Shows A Positive Message ...



Source: Yuka

MAHA has changed snacking behavior

Impact Of MAHA On Snack Choices

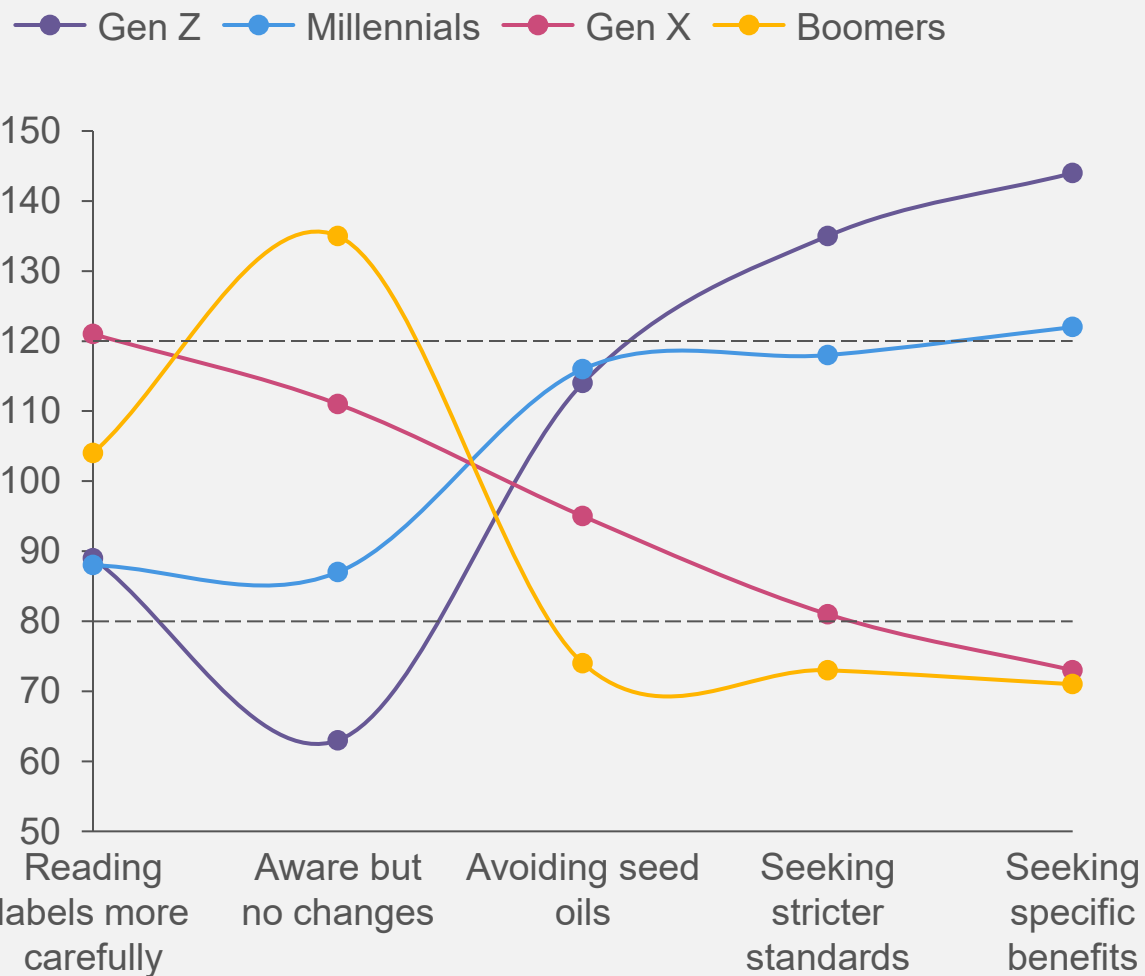


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Older consumers are most-resistant

MAHA Impact, By Generation

Indexed To Total Respondents





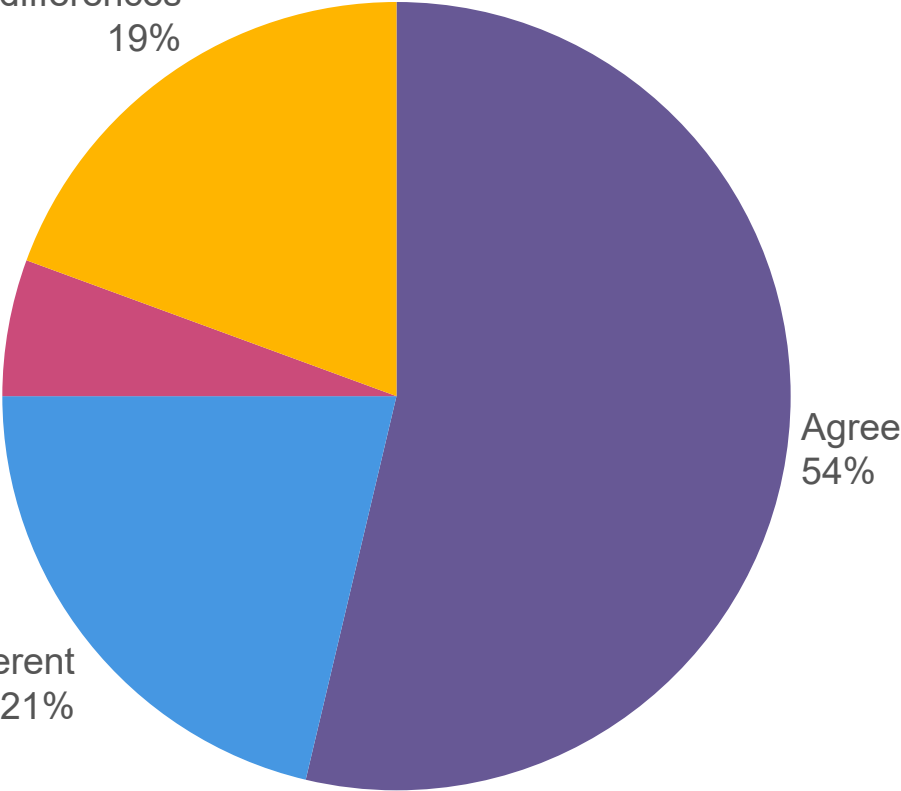
EU standards feel safer and higher quality

Agreement That Snacks Made With EU Standards Are Safer & Higher Quality Than Those With US Standards

Not familiar enough
with differences
19%

Disagree
6%

Indifferent
21%



Source: NIQ, BASES Snacking Survey, n=2,024, 2026

There are visible differences between natural and artificial colors



Enriched Corn Meal (Corn Meal, Ferrous Sulfate, Niacin, Thiamin Mononitrate, Riboflavin, Folic Acid), Vegetable Oil (Corn, Canola, and/or Sunflower Oil), Flamin' Hot Seasoning (Maltodextrin [Made from Corn], Salt, Sugar, Monosodium Glutamate, Yeast Extract, Citric Acid, Artificial Color [Red 40 Lake, Yellow 6 Lake, Yellow 6, Yellow 5], Sunflower Oil, Cheddar Cheese [Milk, Cheese Cultures, Salt, Enzymes], Onion Powder, Whey, Whey Protein Concentrate, Garlic Powder, Natural Flavor, Buttermilk, Sodium Diacetate, Disodium Inosinate, Disodium Guanylate), and Salt. CONTAINS MILK INGREDIENTS.



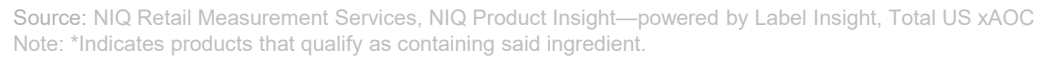
Maize, Rapeseed Oil, Flamin' Hot Flavour [Flavourings (contains Soya, Wheat), Sugar, Flavour Enhancers (Monosodium Glutamate, Disodium 5'Ribonucleotide), Fructose, Salt, Dried Onion, Soya Sauce Powder (contains Wheat), Hydrolysed Soya Protein, Dried Garlic, Colour (Paprika Extract)].



Source: Reddit

A bowl of turmeric soup with ginger and blueberries. The soup is a vibrant orange color, and the bowl is white. In the foreground, there is a wooden cutting board with a small metal spoon holding a dollop of orange powder. Next to the spoon are some ginger roots and a few blueberries. The background is softly blurred, showing more of the soup and ingredients.

4-Year CAGR



A warning and an opportunity

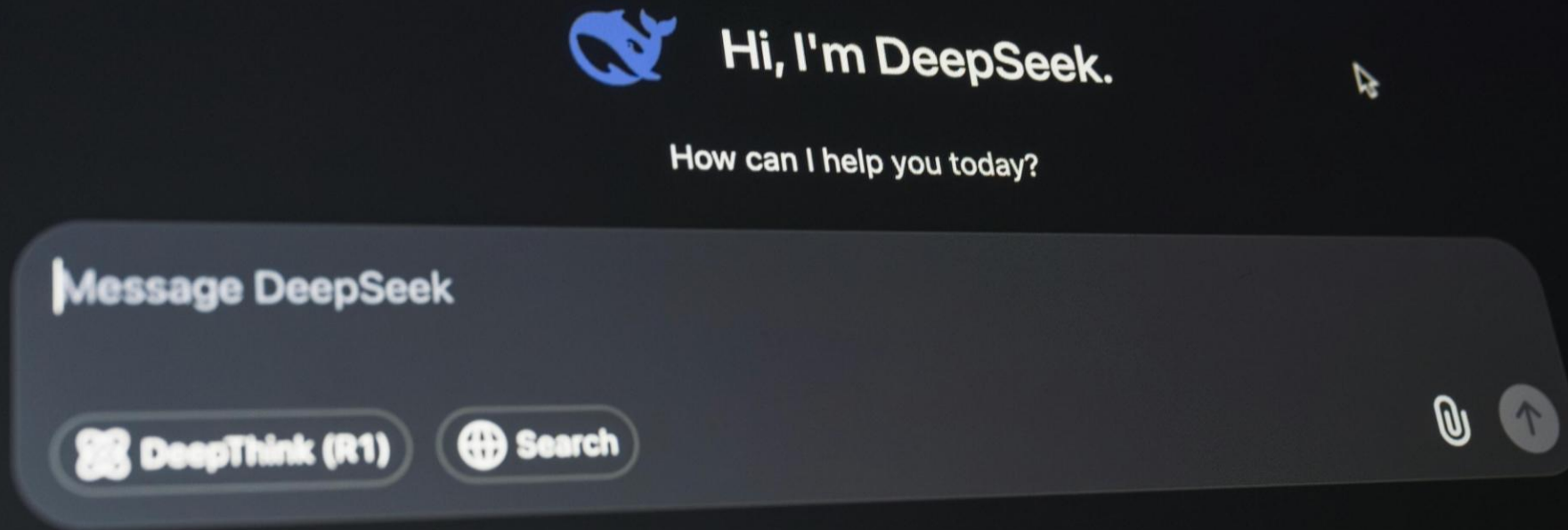


Technology is
hammering a wedge
between shoppers
and brands;

retailers

are caught in
the middle

Scaling tech means surrendering control



As AI adoption widens, so will its influence

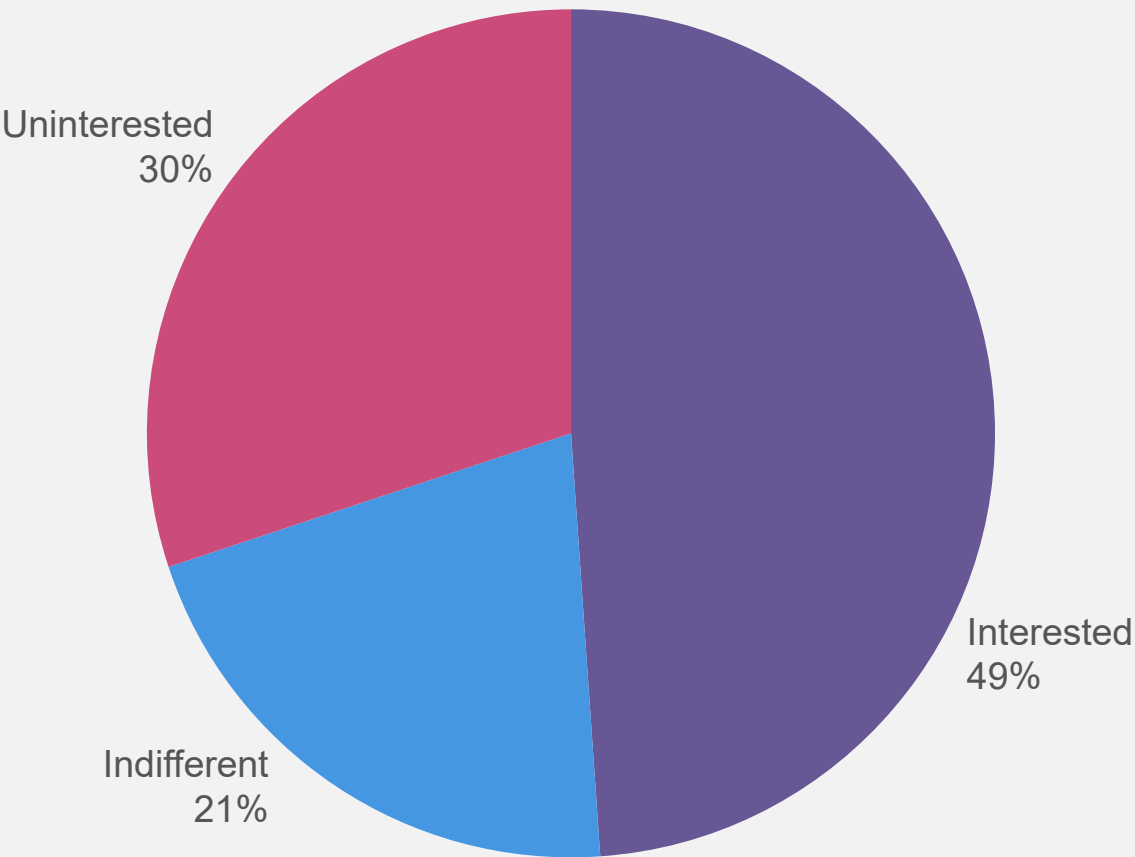
How Consumers Are Using Artificial Intelligence



Source: NIQ, BASES AI Survey, n=2,029, 2026

Shoppers are willing to relinquish control

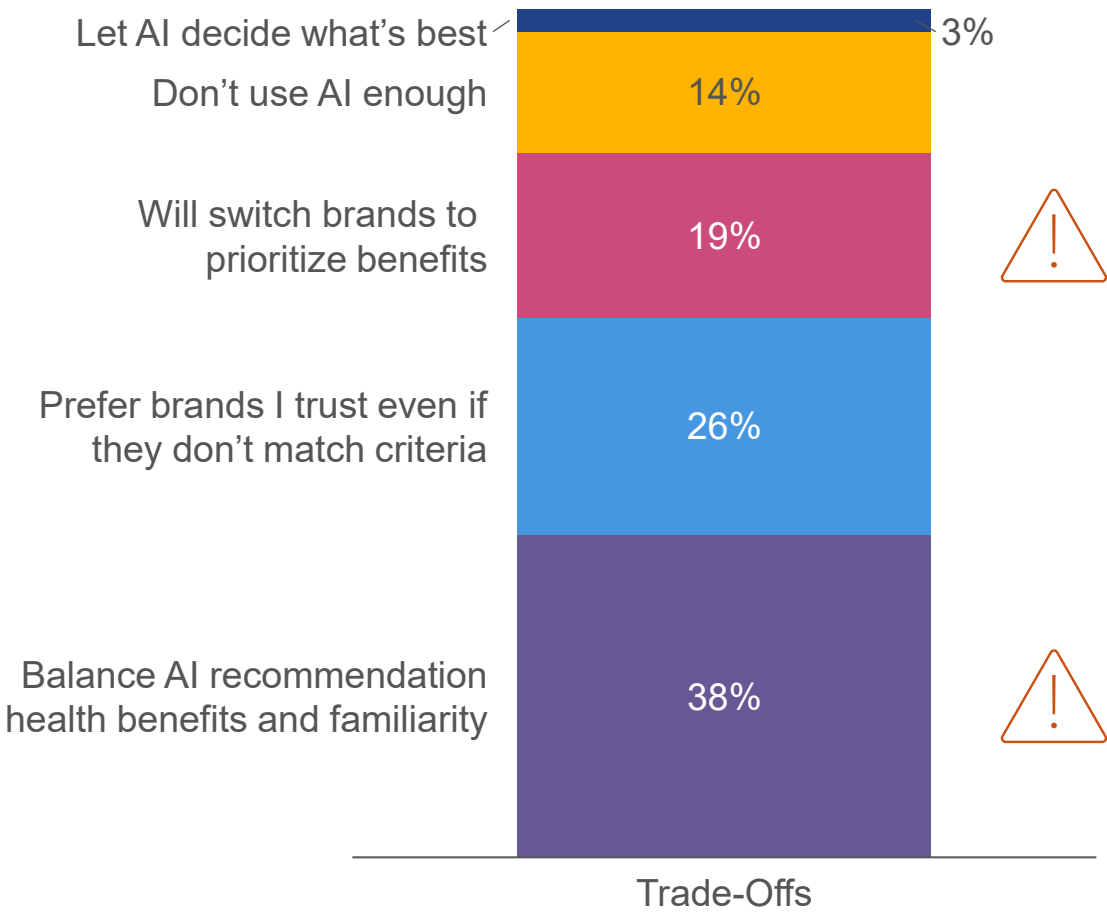
Interesting In AI Helping Research And Buy Products



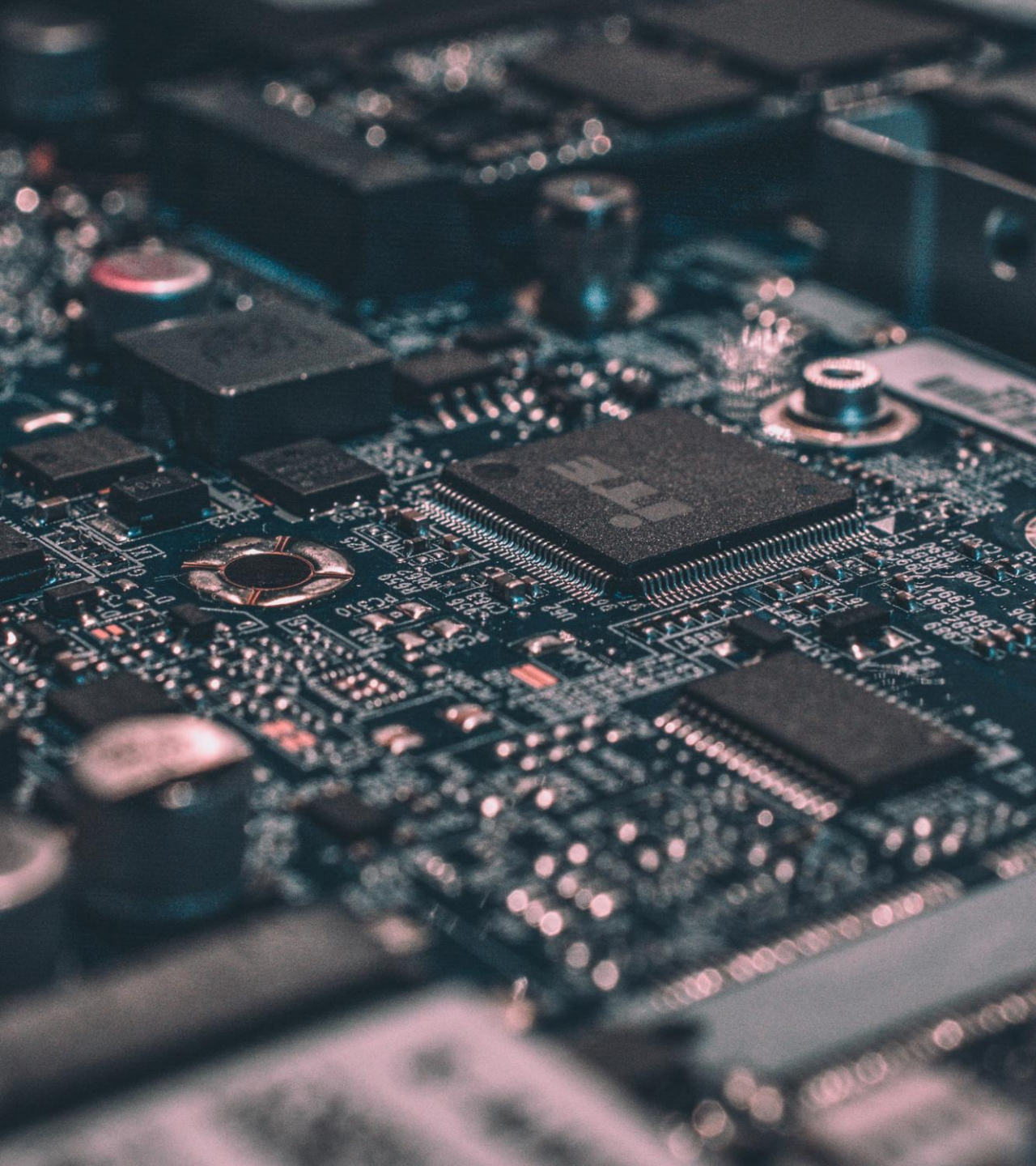
AI has the power to override brand loyalty

Trade-Offs When Shopping With Artificial Intelligence

Among Those Who Use AI To Help With Food & Beverage Shopping



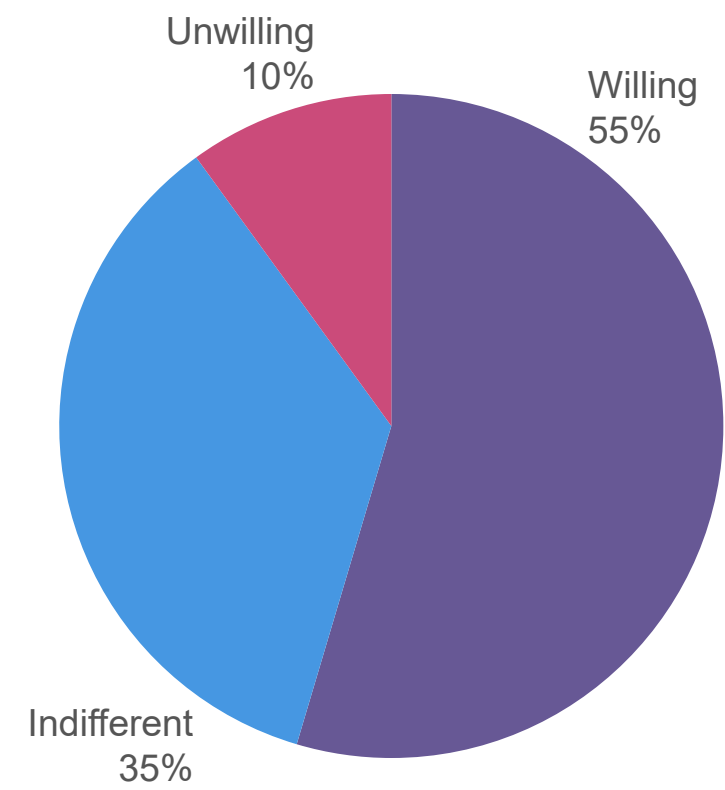
Source: NIQ, BASES AI Survey, n=2,009, 2026



Brand diminishes in importance with AI



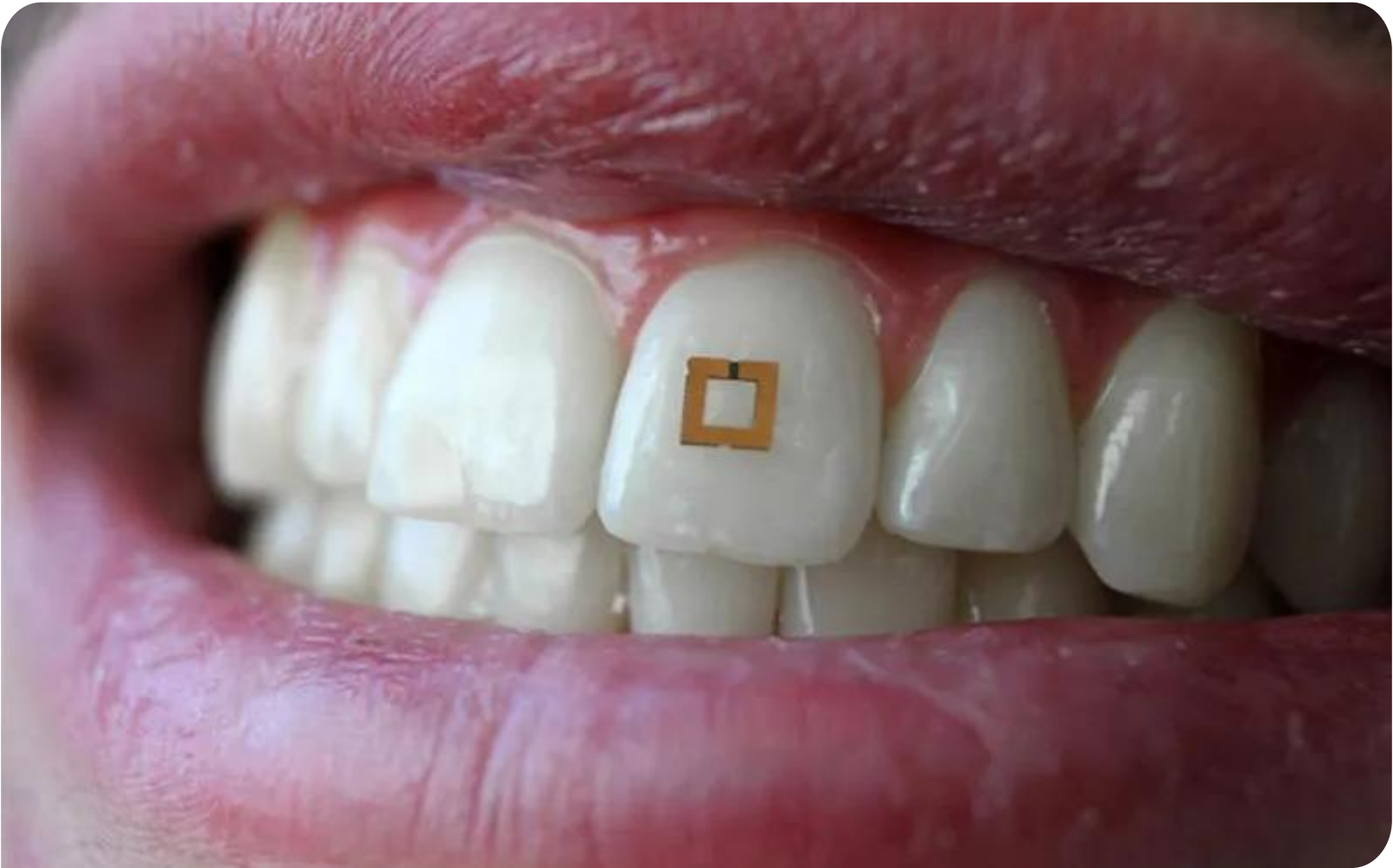
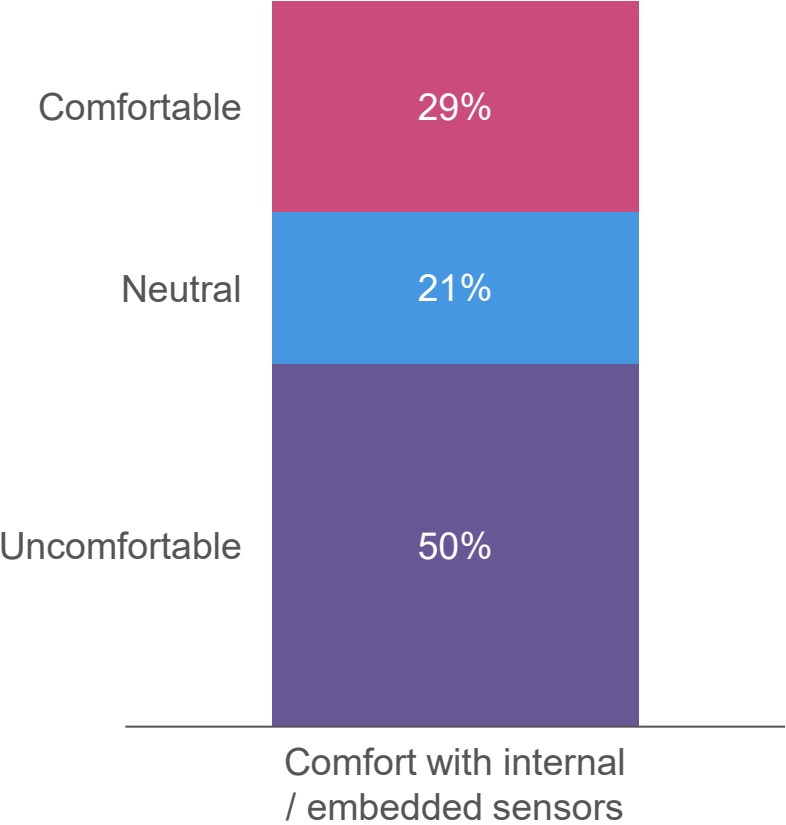
Willingness To Buy An AI-Recommended, Unfamiliar Brand That Meets Health/Nutrition Goals
Among Those Who Use AI To Help With F&B Shopping



Source: NIQ, BASES AI Survey, n=2,009, 2026

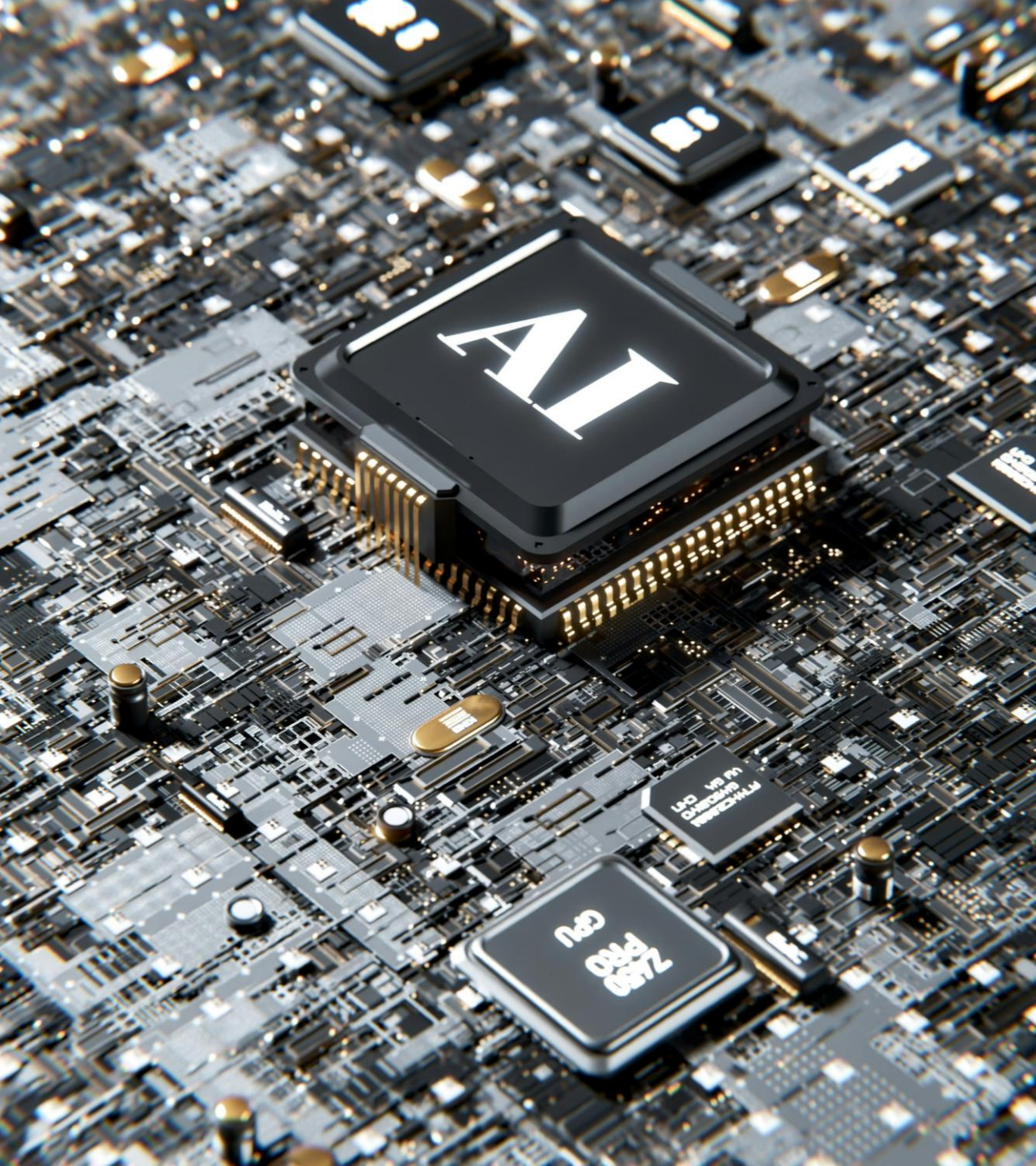
Next-gen technology will unlock next-gen help

Comfort With Embedded Sensors That Monitor Nutrition Over Wearables



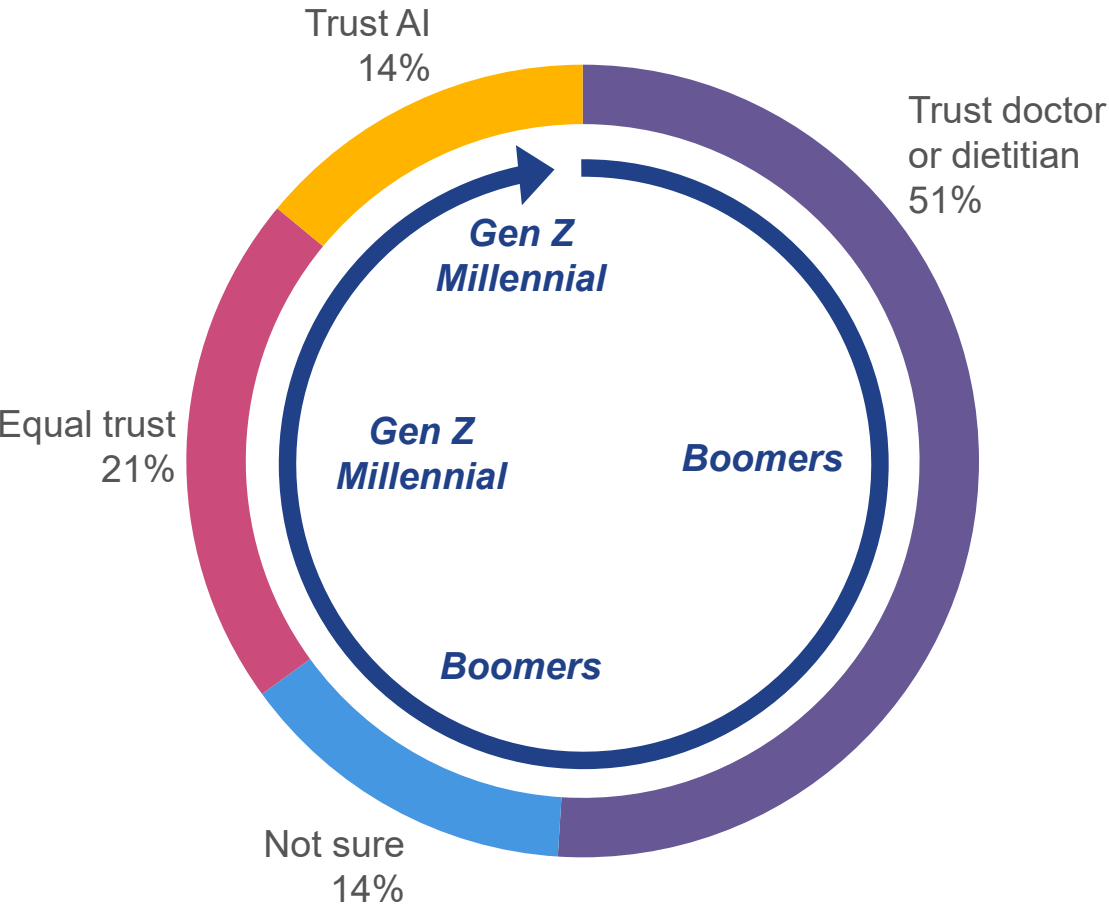
Tooth-mounted sensor Tufts

Source: NIQ, BASES Quick Question Omnibus Survey, n=1,002, December 2025
Image Source: Smithsonian Magazine. (2018, April 9). Tooth-mounted sensor Tufts [Image]. In This tiny tooth sensor could keep track of the food you eat. Smithsonian Magazine. <https://www.smithsonianmag.com/innovation/this-tiny-tooth-sensor-could-keep-track-food-you-eat-180968763/>

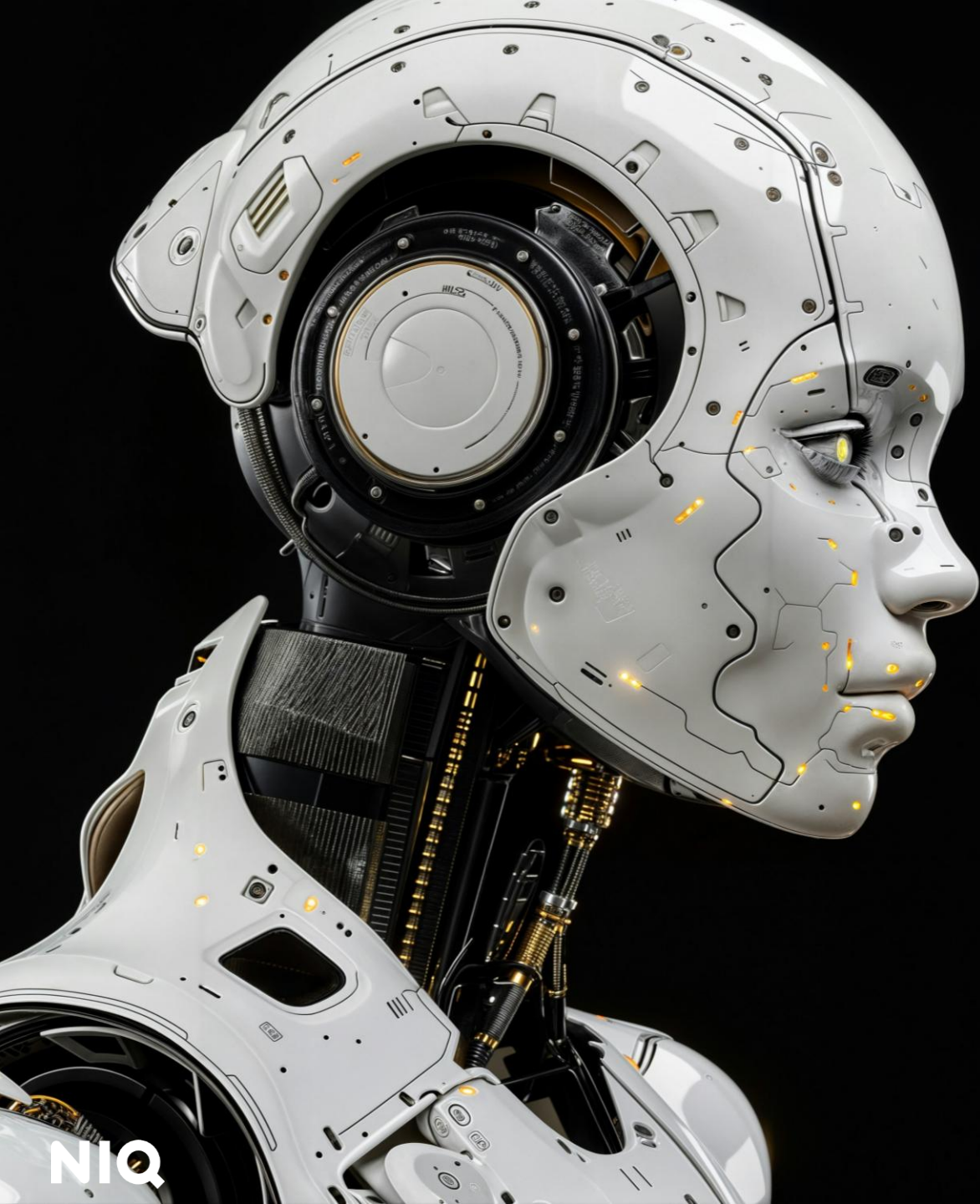


AI will super-charge next-gen technology

Trust In Real-Time Nutritional Intervention From Agent Connected To An Embedded Sensor Vs. A Doctor



Source: NIQ, BASES Quick Question Omnibus Survey, n=1,002, December 2025



Hey Chris, I've picked up on a little extra stress this week—and a few afternoon energy dips.

I've lined up lighter, higher-protein snacks for your workdays and a treat for the evenings.

I still have \$50 left in the snack budget you gave me this month. We're in a good spot.

I reordered your go-to ice cream and added a couple new snacks that will help get you through the afternoons.

It'll all be at your door today before 5. Nothing you need to worry about, it's handled.

Snacking has entered its accountability era

Snacks are being audited



Every bite is being evaluated for purpose, payoff, and personal tradeoffs, not habit or hunger alone.

Protein has peaked



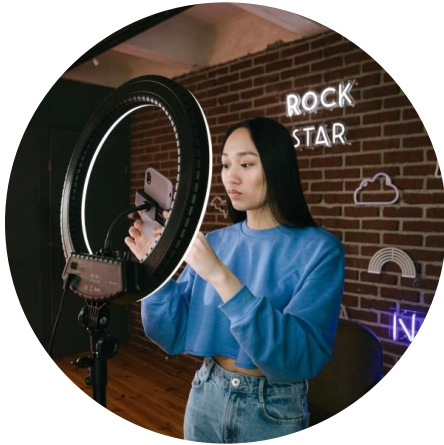
Fortifications aren't enough to earn trust as skepticism around processing, hype, and excess rise.

Health is now mediated



Apps, AI, and smart devices increasingly decide what qualifies as acceptable before brands get a voice.

Discovery broke the funnel



Influence happens everywhere but purchase still consolidates where trust and logistics live.

Convenience isn't convenient



Shoppers reject impulse premiums when price transparency and personal wellness goals collide.

The shelf is a statement

What **RETAILERS** should be focused on right now...

Retailers must curate, not just carry



Shoppers expect the snack aisle to feel filtered, intentional, and defensible, not indefinite.

- *More guardrails, less clutter*
- *Curate navigation by need, not brand block*
- *Trusted assortment, not lots to sift through*

Retailers can't let claims substitute for credibility



Over-indexing on protein risks shopper skepticism bleeding into the entire set.

- *Balance function with legitimacy*
- *Avoid overstuffed claim walls*
- *Give space to "enough" over "more"*

Retailers are judged by systems they don't control



What's on the shelf is not the final arbiter anymore as technology's role expands.

- *Anticipate more and intensifying scrutiny*
- *Reduce friction between label and reality*
- *Protect shopper from surprise disqualification*

Retailers need a response strategy, not every viral SKU



Ignoring social discovery and virality forfeits relevance.

- *Faster reaction beats full adoption*
- *Translate buzz into owned executions*
- *Let stores be punctuators, not mirrors*

Retailers must rebuild impulse around value, not temptation



High prices and wellness goals now block reflex purchasing.

- *Reframe impulse as "worth it"*
- *Support intentional treat occasions*
- *Fix price gaps shoppers already see*

Every snack must earn its place

What **MANUFACTURERS** should be focused on right now...

Brands need to earn their place beyond hunger



Every SKU within a brand's portfolio needs a clear reason to exist under scrutiny.

- *Purpose needs to be obvious*
- *Emotional / functional payoff must be justified*
- *"Nice to have" won't survive*

Brands need to find differentiation other than protein



Excessive protein and inclusion in highly processed foods invite distrust, not loyalty.

- *Calibrate, don't stack*
- *Let formulation speak quieter but clearer*
- *Avoid overclaiming what apps will question*

Brands are being judged by algorithms before humans



Optimization is increasingly happening upstream, not at the shelf.

- *Formulate for machine logic, not just label design*
- *Expect ratings to override branding*
- *Ingredient discipline is now table stakes*

Brands must separate influence from distribution



Virality builds awareness but does not guarantee sell-through.

- *Design products that travel digitally first*
- *Give retailers adaptable versions, not clones*
- *Assume discovery and purchase are decoupled*

Brands need to design impulse for a deliberate shopper



Value, trust, and restraint drive today's splurge.

- *Make indulgence feel earned*
- *Support smaller, smarter treat formats*
- *Accept that fewer buys mean better buys*

Webinar registration now open

Snackonomics 4.0

Part II



Protein



Fiber



Sustainability



Beverages



Gen Alpha

...and more

Thank you



Chris Costagli

Vice President, Thought Leadership
Food & Beverage Insights Lead
Chris.Costagli@NielsenIQ.com



Carly Levin

Director, Thought Leadership
Sweets & Snacks
Carly.Levin@NielsenIQ.com

NielsenIQ

Request the slides

Access more content

Share feedback

