Snackonomics 4.0

Shoppers are granting permission differently than ever before

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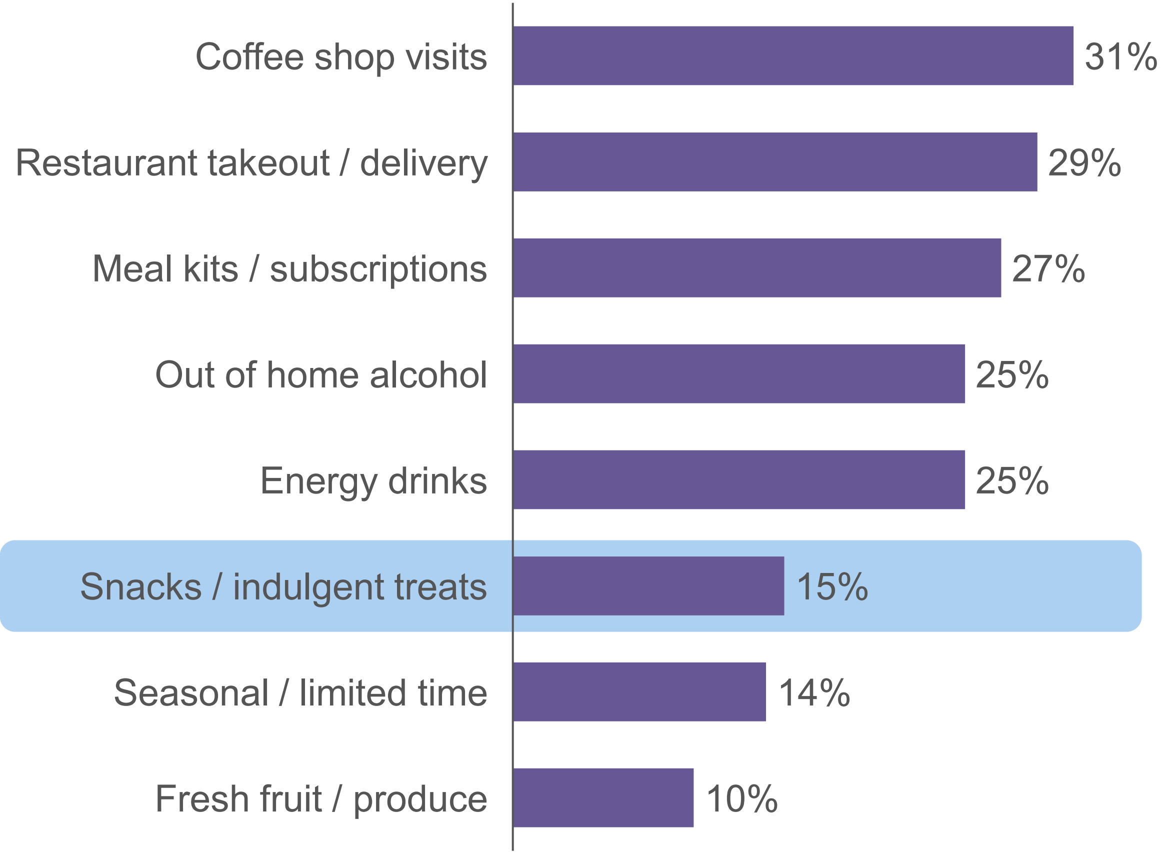
Sweets & Snacks

June 2026

Some things just aren’t worth it anymore

What Is No Longer Worth It At Today’s Prices



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

A more intentional choice isn't always cheaper

The problem is value, not price

Think about how product value has changed in the last 5-7 years

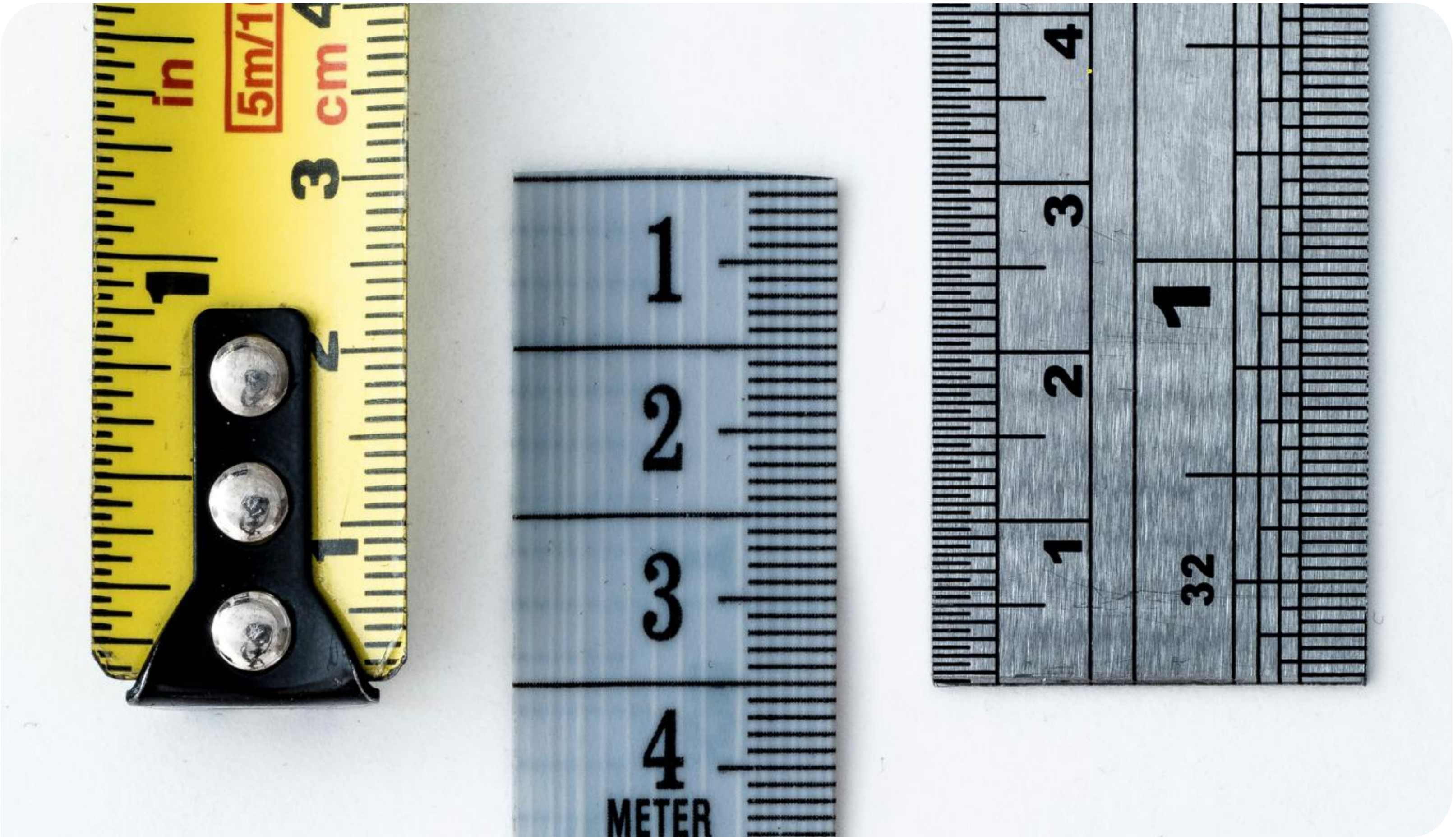
To preserve margins and profit as costs went up brands have

downsized

reformulated

repackaged

increased price



Think about what has come into focus

Policy shined a light on ingredients; while technology gave everyone a magnifying glass

MAHA

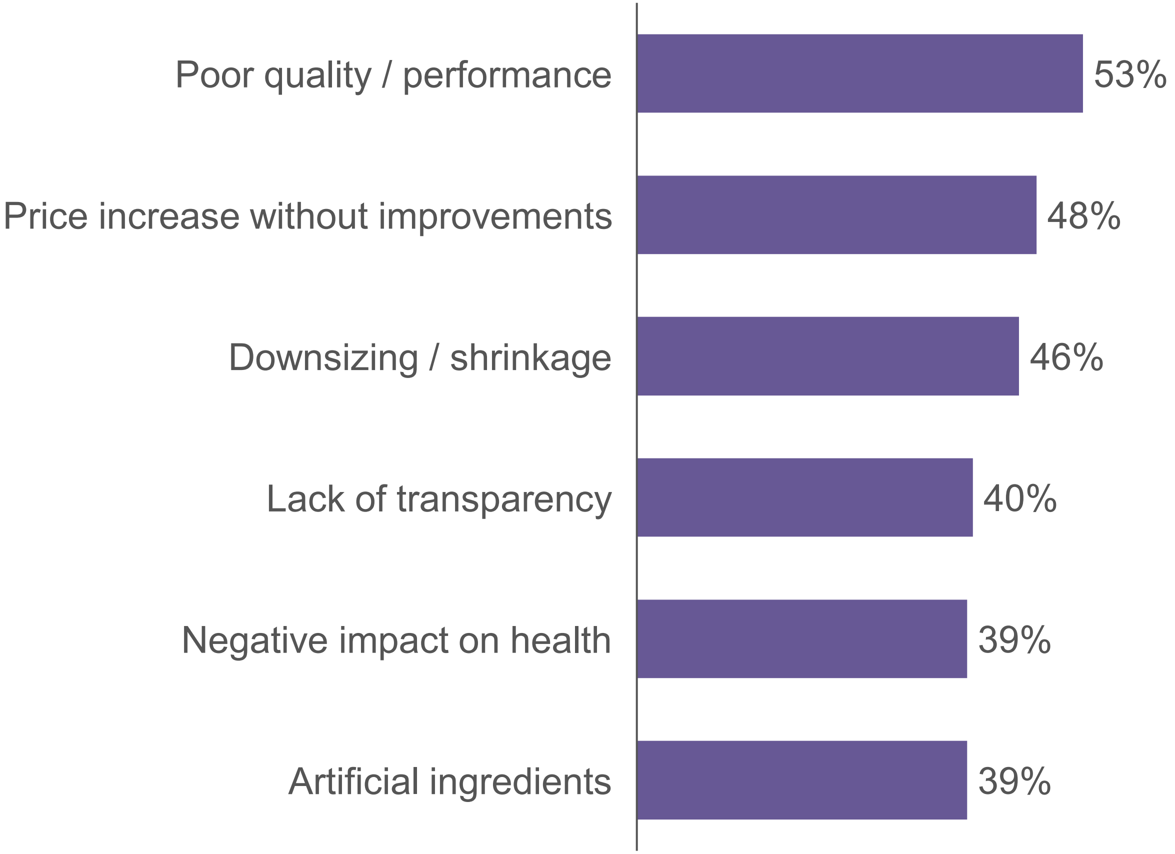
Ingredients

Social media

AI / scan apps

Turns out, all those things erode trust

Leading Reasons For Loss In Brand Trust



Source: NIQ, BASES Trust Survey, n=1,000, 2025

Brands that raised price and kept everything else the same…

Decreased in value

Brands that raised price and shrunk product sizes…

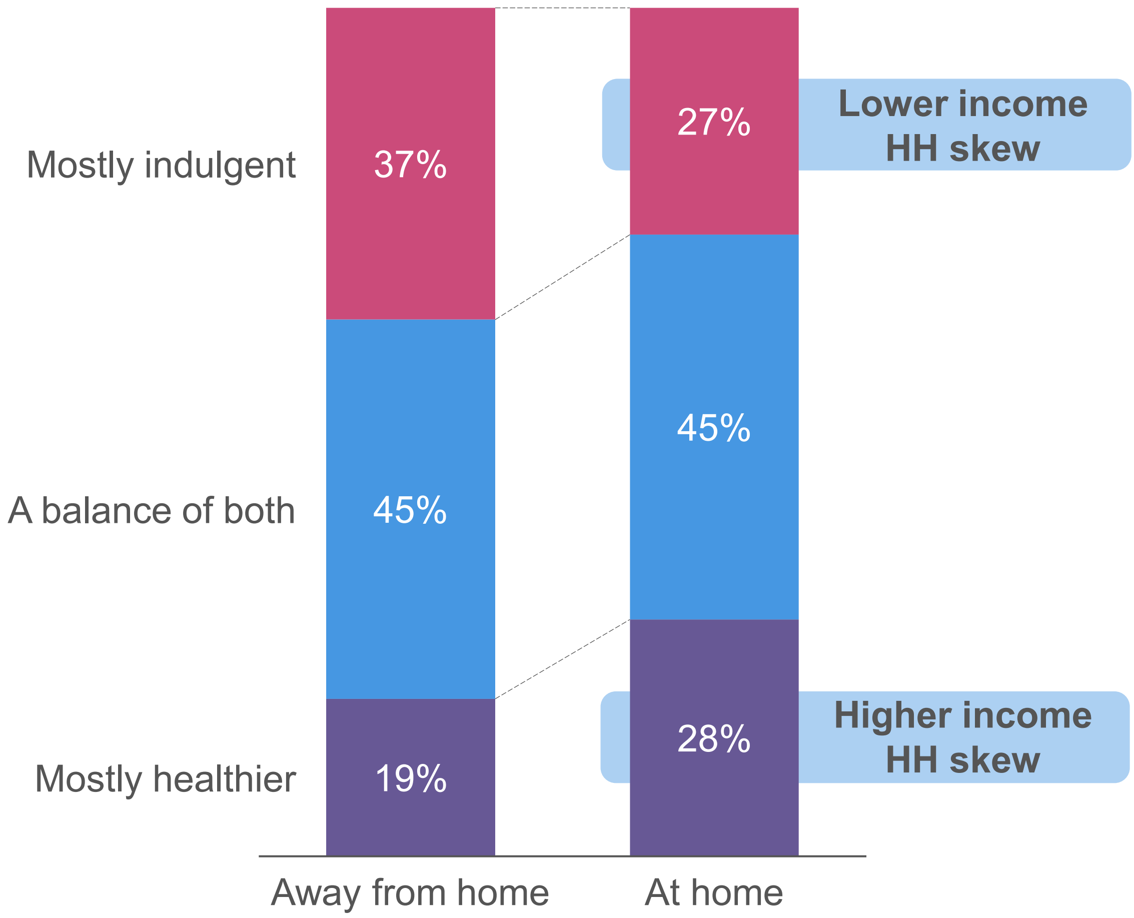
Decreased in value even more

This is not to say shoppers won’t pay higher prices…

Brands just have to earn permission

Understanding snack preferences is step one

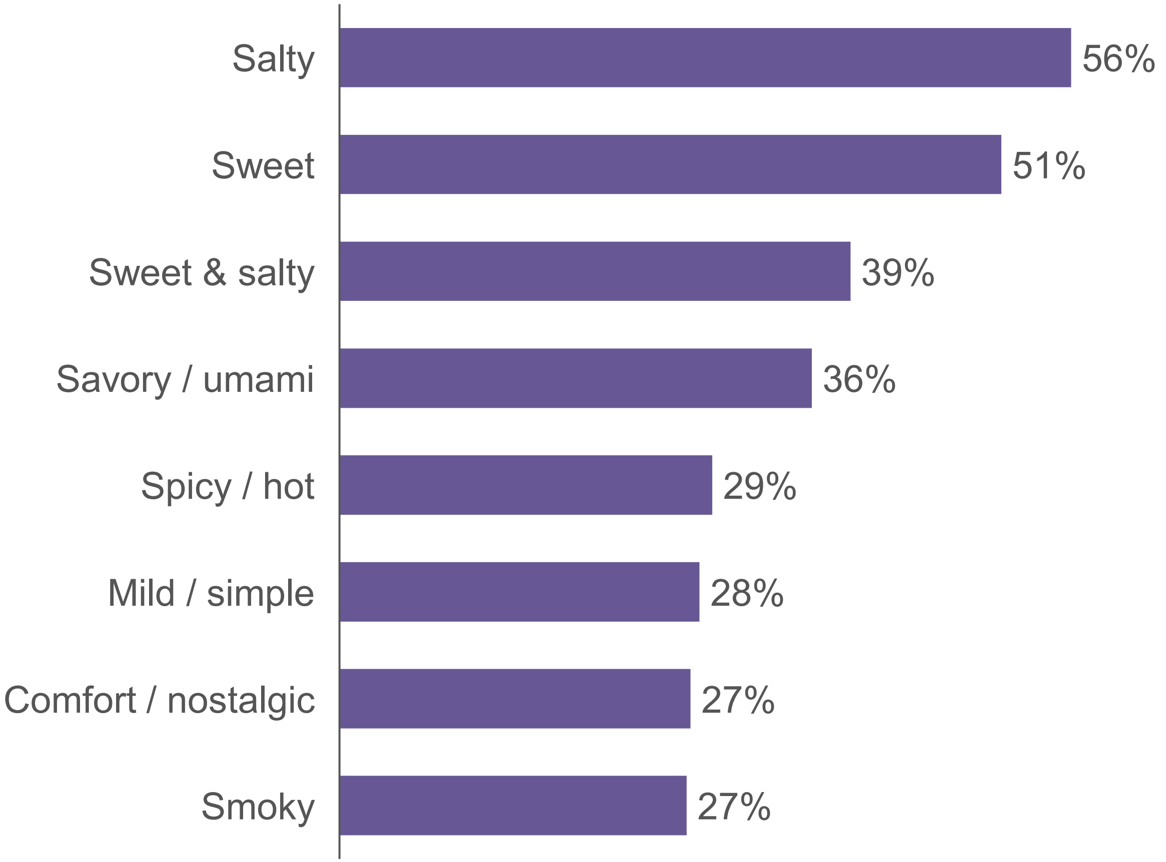
Snack Type Preference By Snacking Location



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

Sweet or salty flavors are safe bets

Most Appealing Snack Flavors

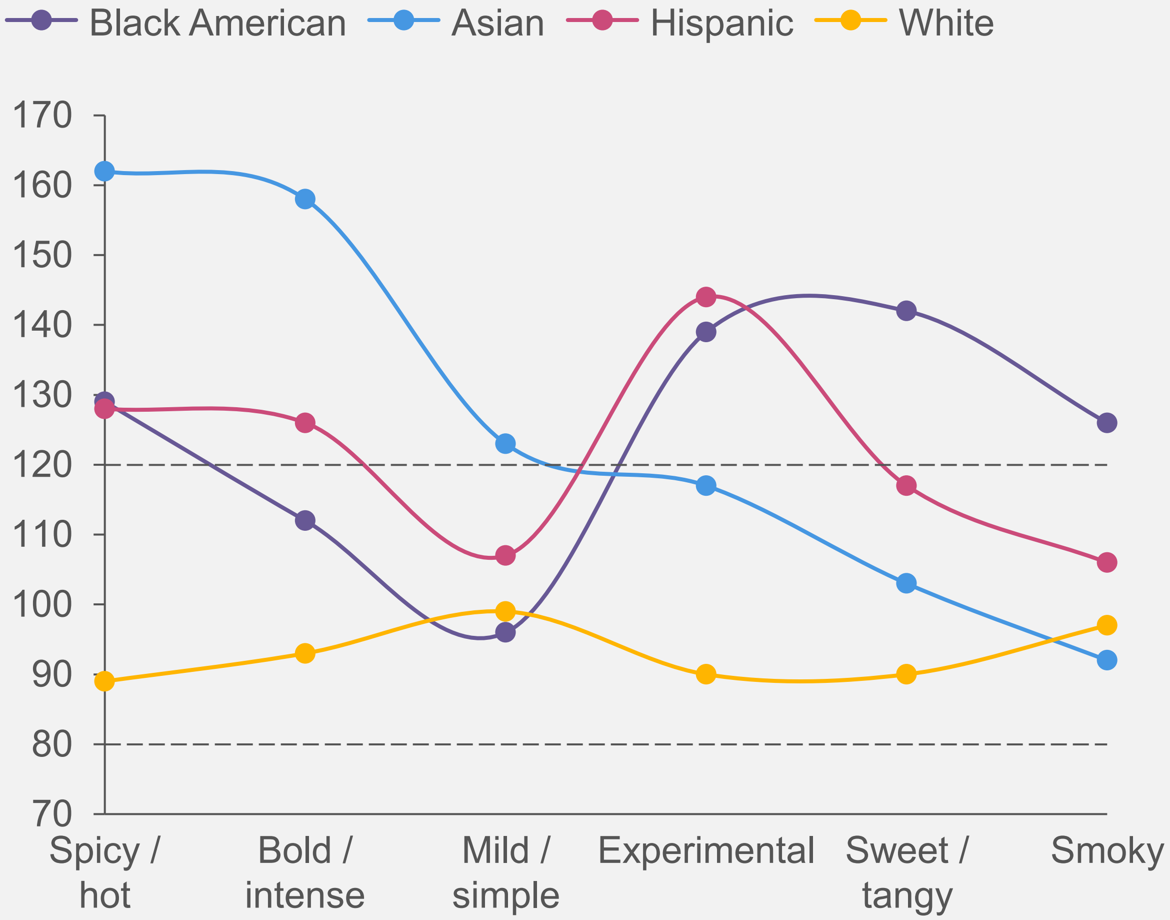


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Know what your shoppers want

Most Appealing Snack Flavors, By Race / Ethnicity

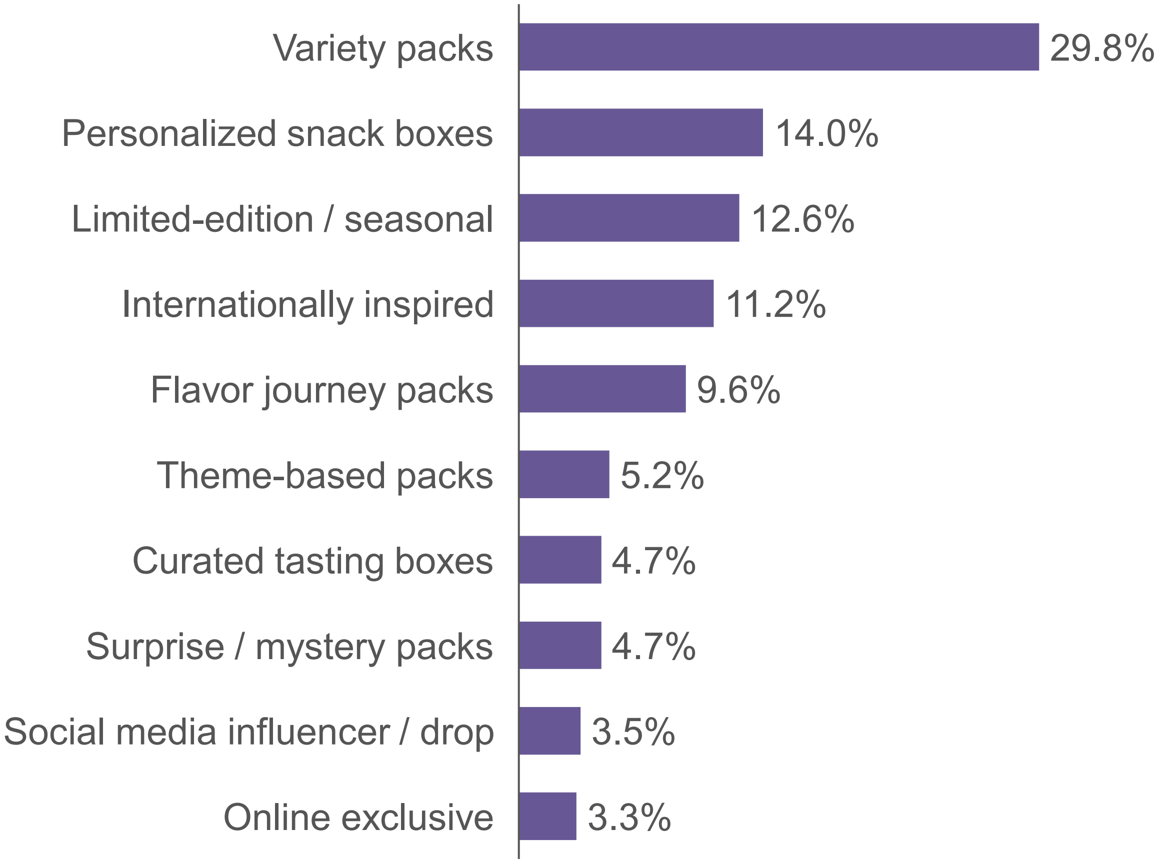
Indexed To Total Respondents



Variety packs have the most interest

Snack Experience Most Interested In

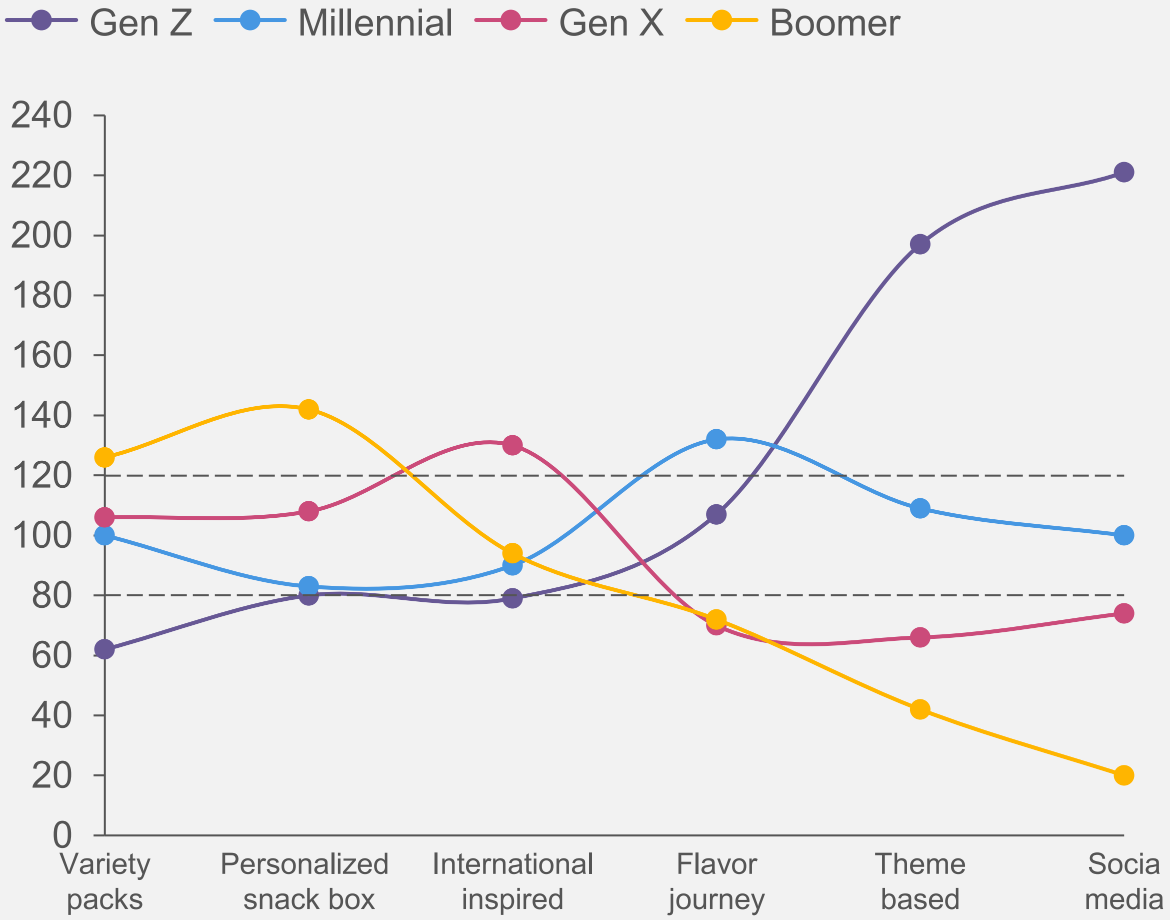
Among Those Interested In A Differentiated Experience



Not for Gen Z, they have other interests

Snack Experience Most Interested In, By Generation

Indexed To Total Respondents

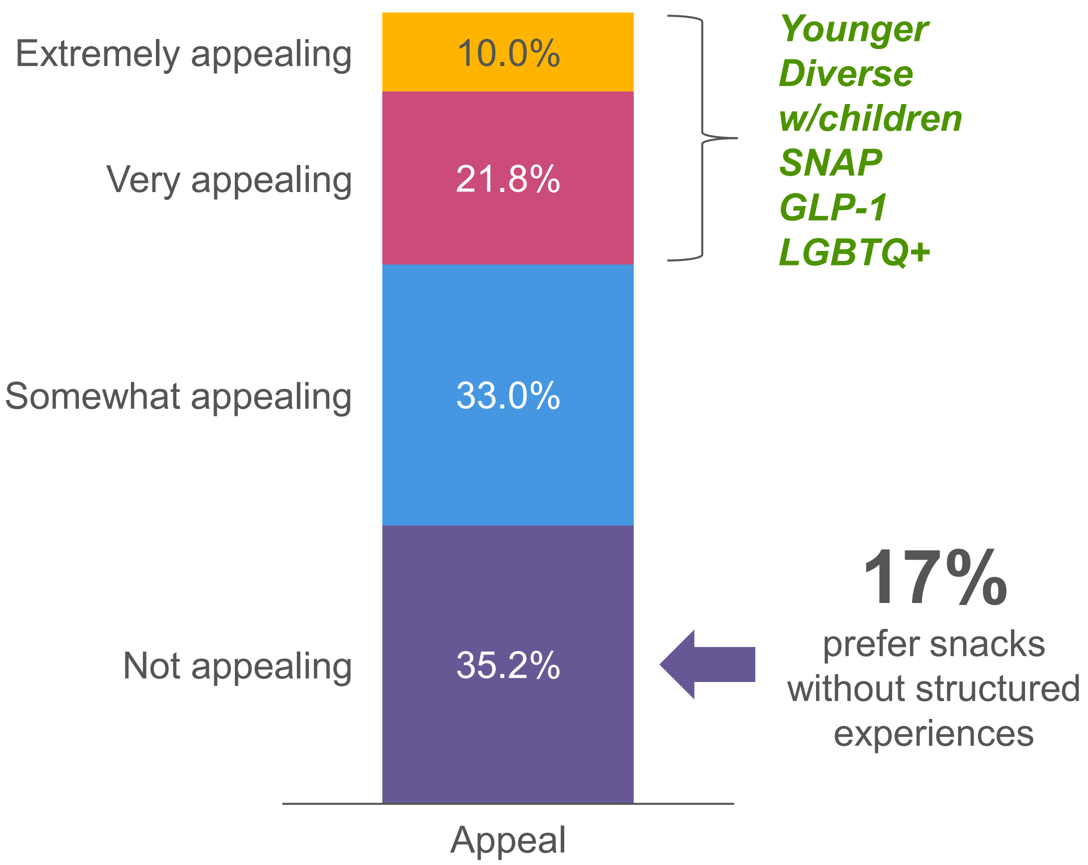


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Progressive snacking has appeal

Appeal Of Progressive Snack Experiences

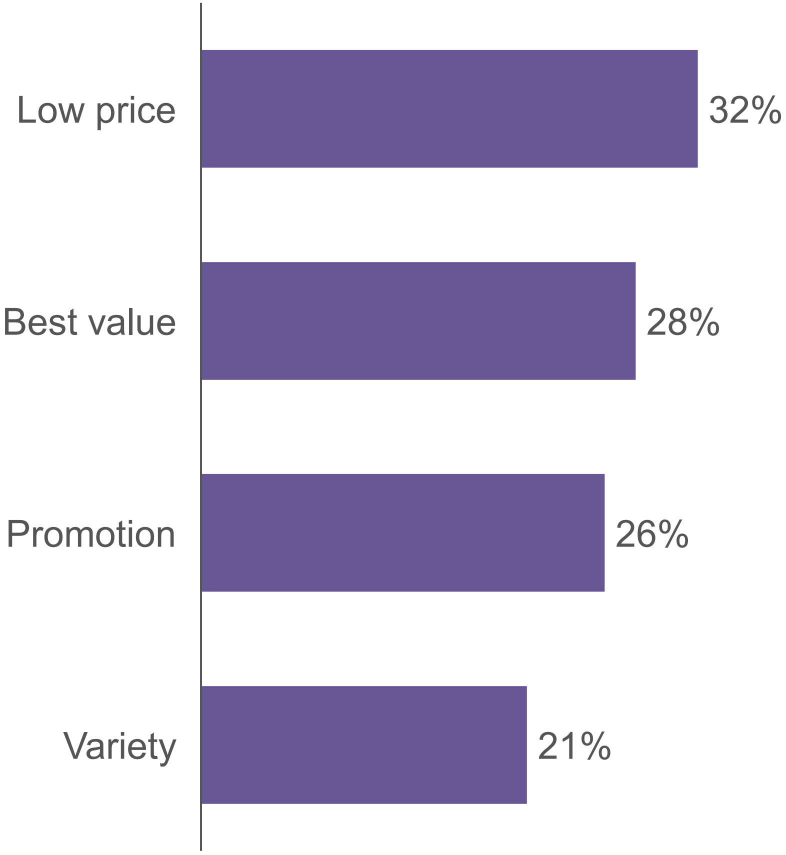
E.g., Multi-Pack To Be Eaten In Sequence, Starts Mild & Ends Intense



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

Price, value, promotion, and variety are leading salty snack choice drivers

Leading Salty Snack Choice Drivers

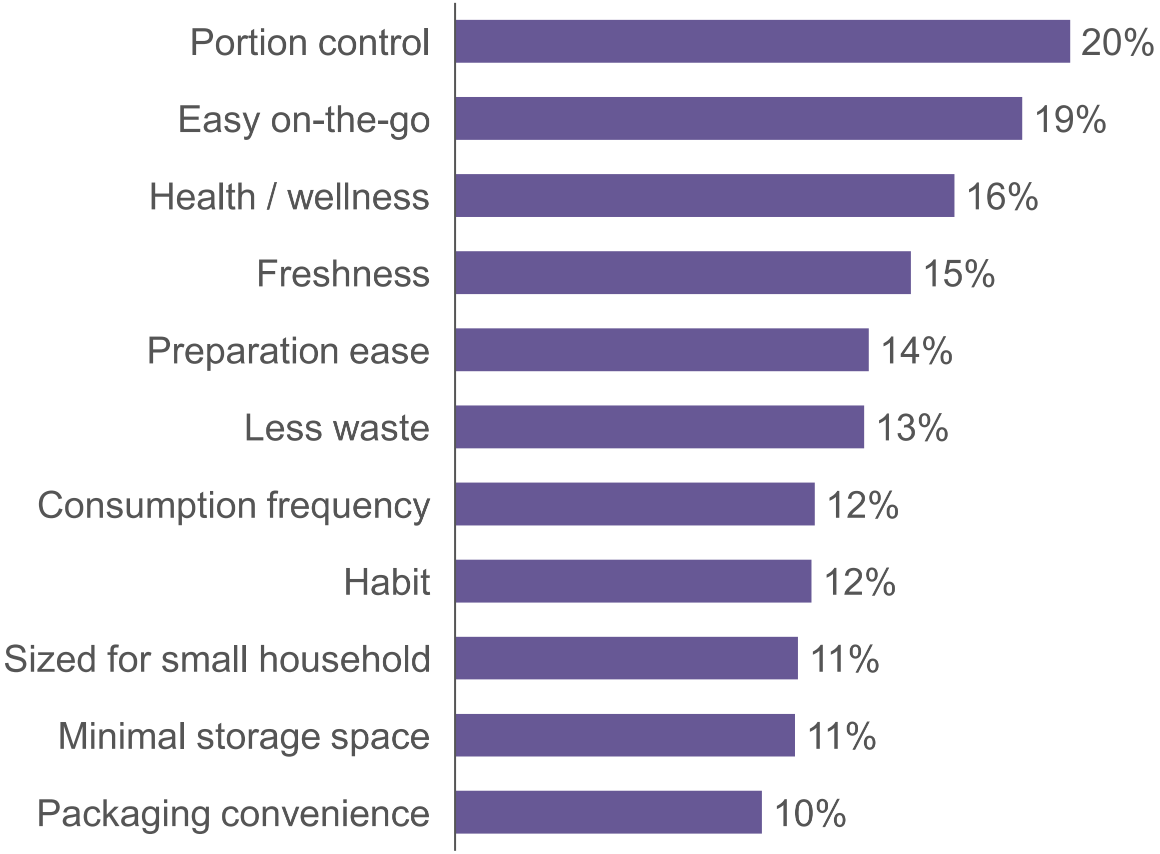


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Make no mistake, it’s more than that

Salty snacks have many paths to value

Salty Snack Choice Drivers



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

Knowing what matters, separates winners from everyone else

Households w/Gen Alpha

1.3x

more likely to choose salty snacks based on ***reduced food waste***

SNAP Households

1.4x

more likely to choose salty snacks based on ***limited storage space***

GLP-1 Households

1.4x

more likely to choose salty snacks based on ***preparation ease***

Black American Households

1.7x

more likely to choose salty snacks based on ***portion control***

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

Stack the equation in your favor

Permission is granted when justification is right

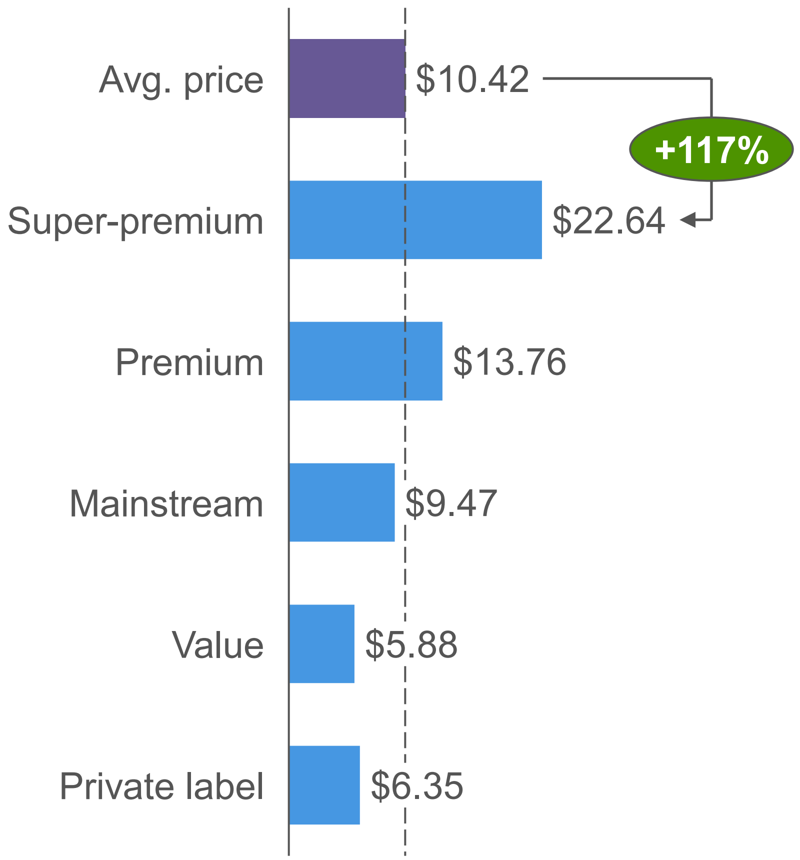
Price is driving dollars and costing volume

Chocolate Category Performance

Source: NIQ, RMS, Total US Full View + Conv., 52-Weeks Ending 5/16/2026

High-end chocolate comes with a price

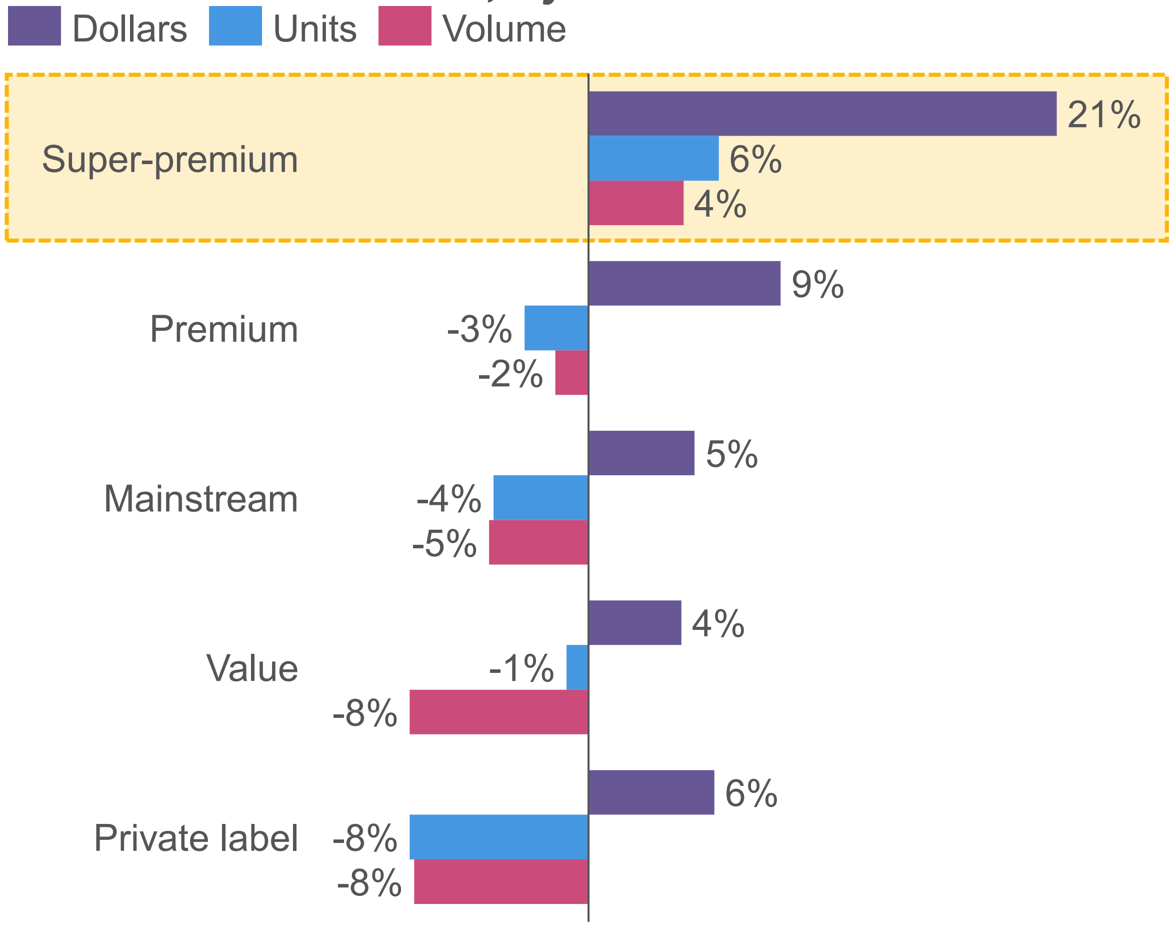
Chocolate Volume Price



Source: NIQ, RMS, Total US Full View + Conv., 52-Weeks Ending 5/16/2026
Note: Price tiers defined using EQ price at the sub-category, sub-brand level. Super Premium ≥1.75, Premium ≥1.25, Mainstream ≥0.75, Value = all other name brands, Private Label = all private label.

Super-premium is winning on all fronts

Chocolate Performance, By Price Tier



Source: NIQ, RMS, Total US Full View + Conv., 52-Weeks Ending 5/16/2026
Note: Price tiers defined using EQ price at the sub-category, sub-brand level. Super Premium ≥1.75, Premium ≥1.25, Mainstream ≥0.75, Value = all other name brands, Private Label = all private label.

That seems counter-intuitive

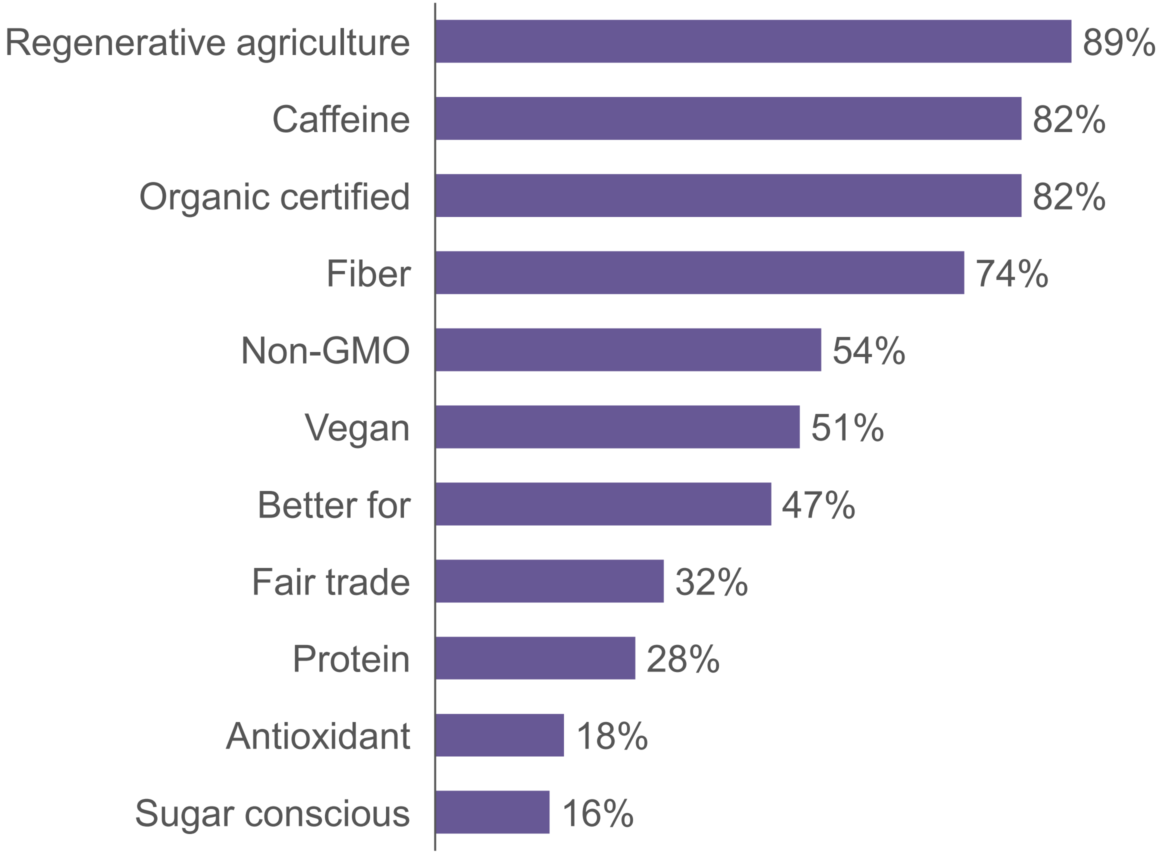
Why is this?

Because permission is granted when justification is right

Super-premium is more than just chocolate

Super-Premium Chocolate Dollar Share Of Claim

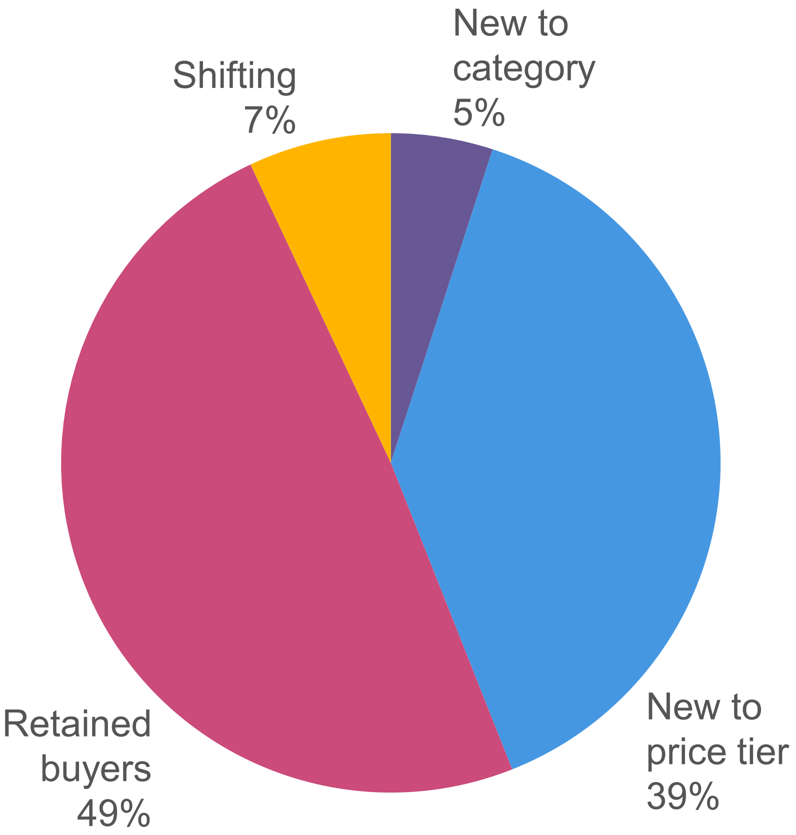
Share Of Claim Within The Chocolate Category



Source: NIQ, RMS, Powered By Product Insights, Total US Full View + Conv., 52-Weeks Ending 5/16/2026
Note: Price tiers defined using EQ price at the sub-category, sub-brand level; Super Premium ≥1.75

Being more, brought in new buyers

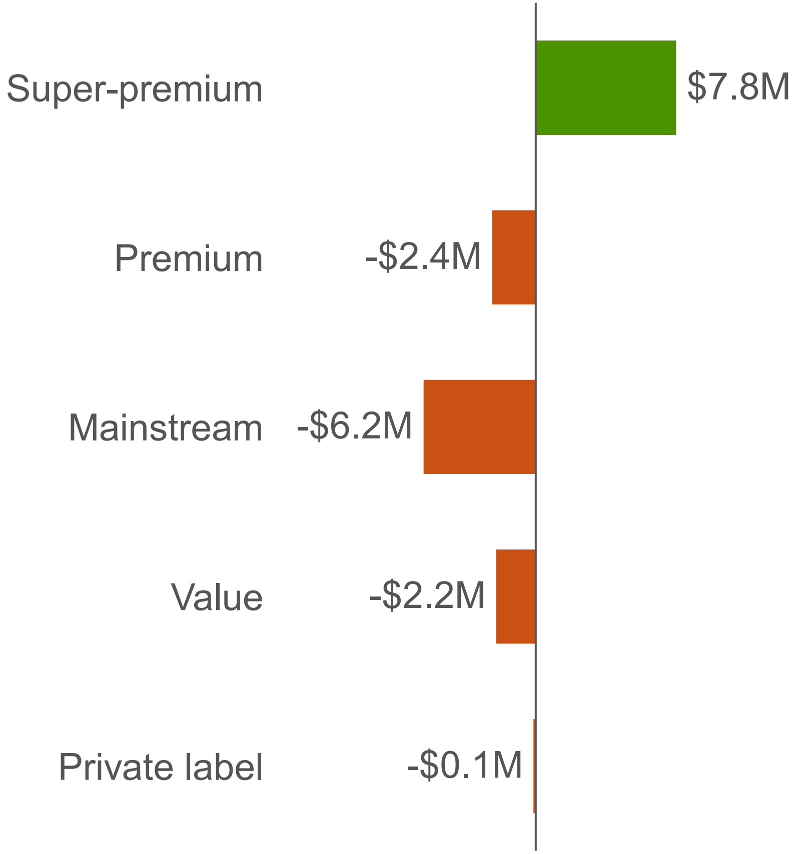
Super-Premium Chocolate Dollar Growth Drivers



Source: NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, 2025

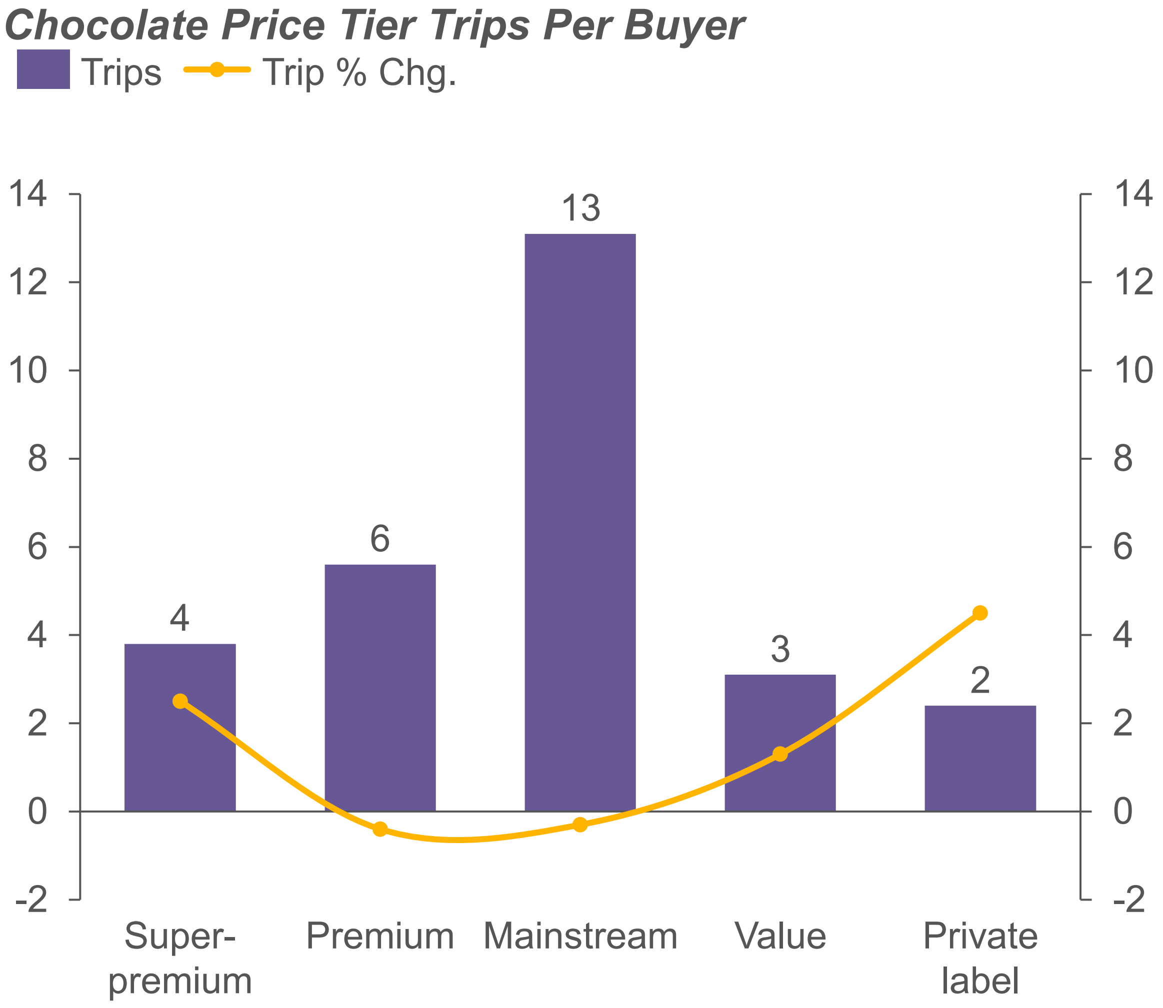
Super-premium became the most valuable recruiter for chocolate

Net New / Lost Chocolate Category Buyer Dollar Contribution



Source: NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, 2025

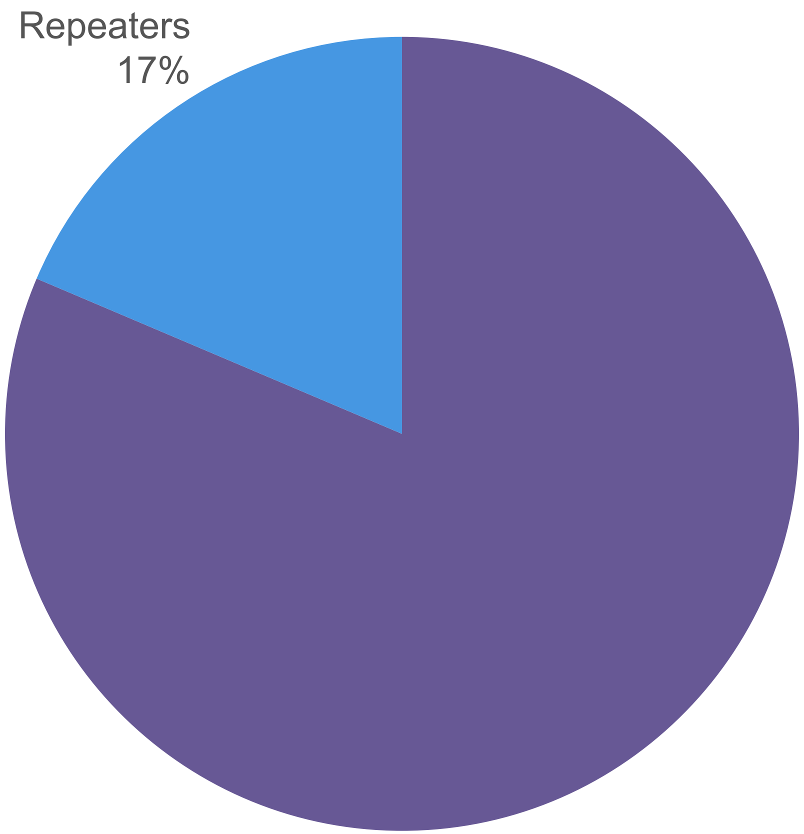
Luxe buyers want an experience, not a repeat



Source: NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, 2025

Brands can't stop with an innovative product

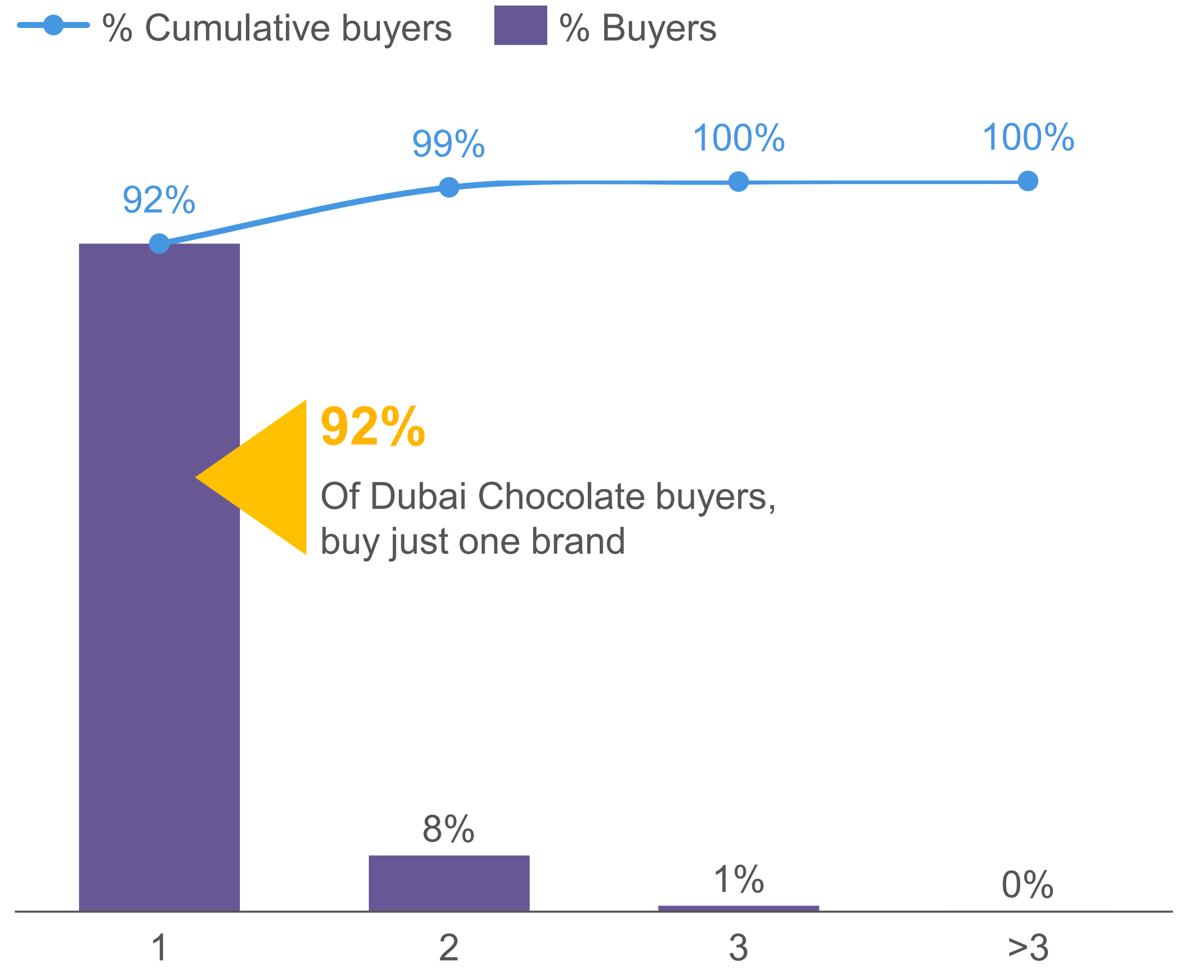
Dubai Chocolate Trial & Repeat



Source: NIQ, Omnishopper Panel On Demand, Total US, Total Outlet, 52 Weeks Ending 2025

Launching Dubai now is risky business

Distribution Of Dubai Chocolate Buyers Across The Number Of Brands They Purchased



Source: NIQ, Omnishopper Panel On Demand, Total US, Total Outlet, 52 Weeks Ending 2025

Dubai chocolate is *so* last season

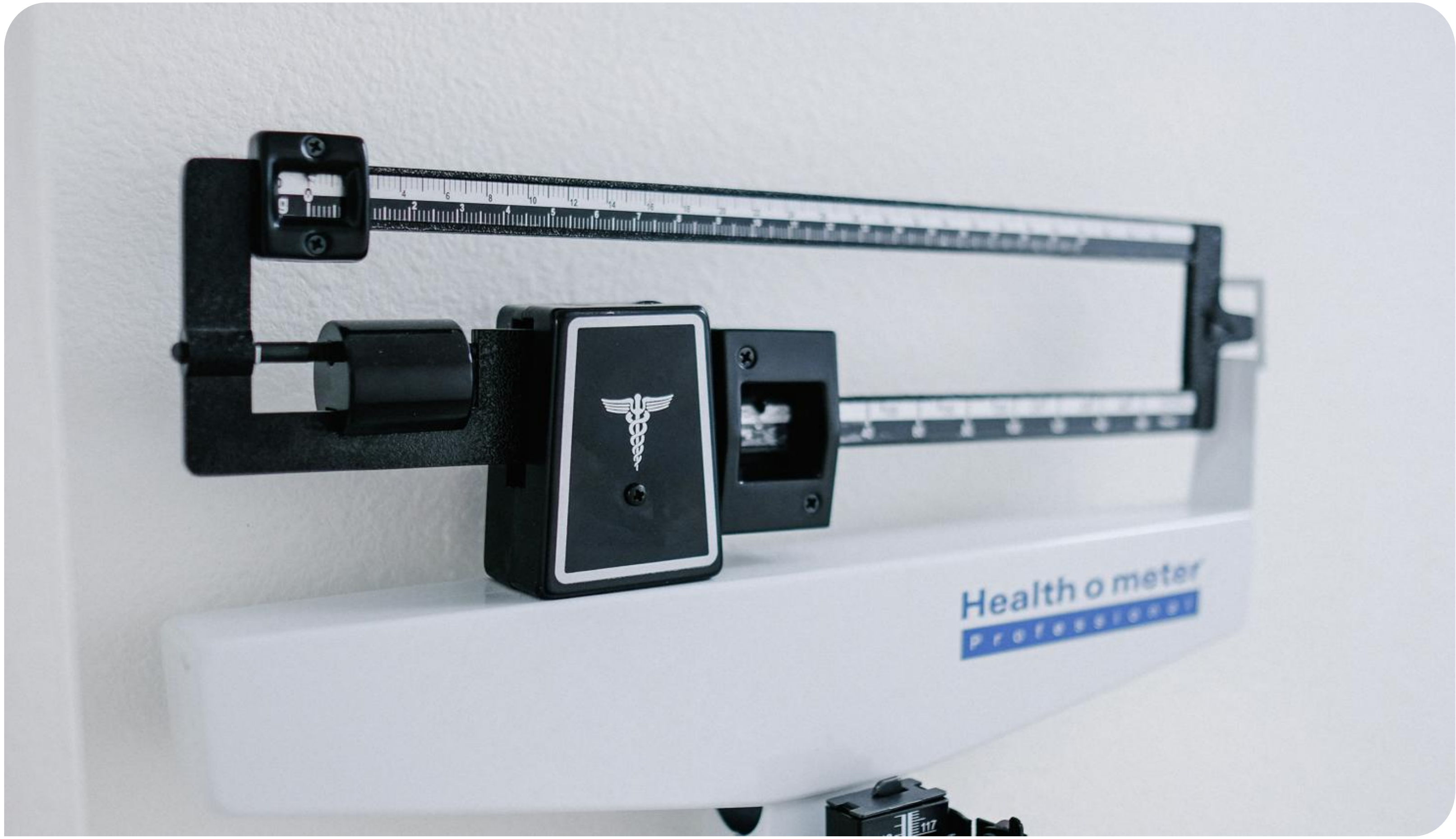
What’s next?

Justification looks different for some

GLP-1 adoption is widening

34%

of shoppers not already on GLP-1 therapy, are interested in the newer, lower cost oral version



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

GLP-1 using households have big purchasing power

$190B

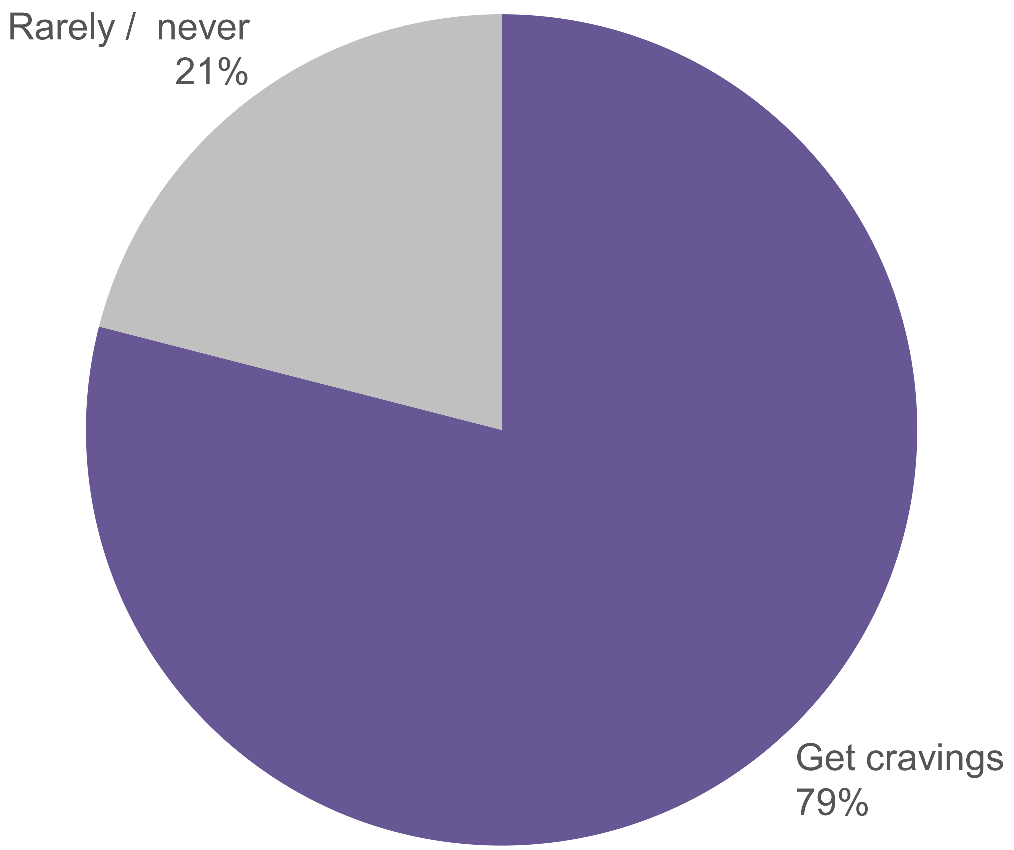
food department purchasing power of
GLP-1 weight loss only
using households

($283B weight loss + Diabetes)

Source: NIQ, Expanded OmniShopper Panel On Demand, Powered By Syndicated GLP-1 Survey In Discover, Fielded March 2026, Total US, Total Outlets, Food Department, 52 Weeks Ending 3/28/2026

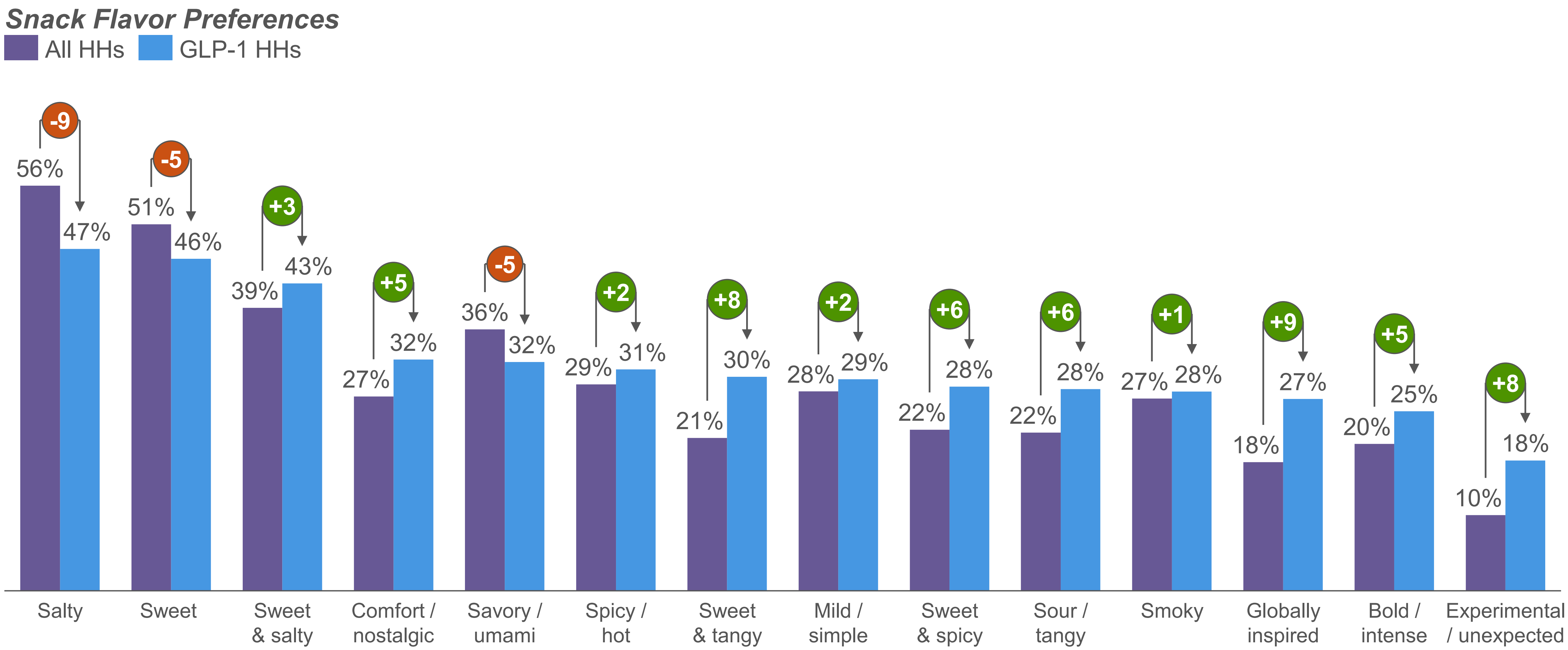
Myth that GLP-1 users don't crave is busted

Snack Cravings While Taking GLP-1 Medication



Source: NIQ, BASES Quick Question Snacking Survey, 2025, n=1,003

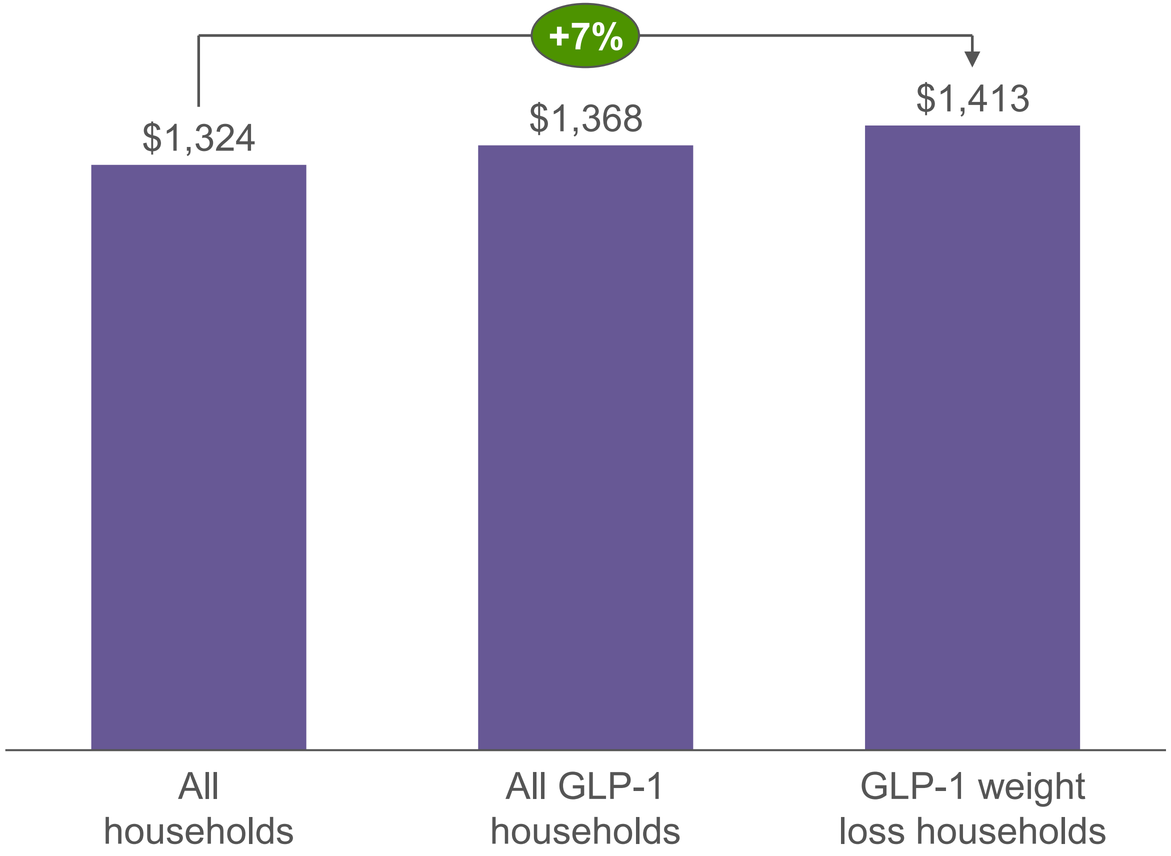
GLP-1 crave bold, complex flavors to snack on



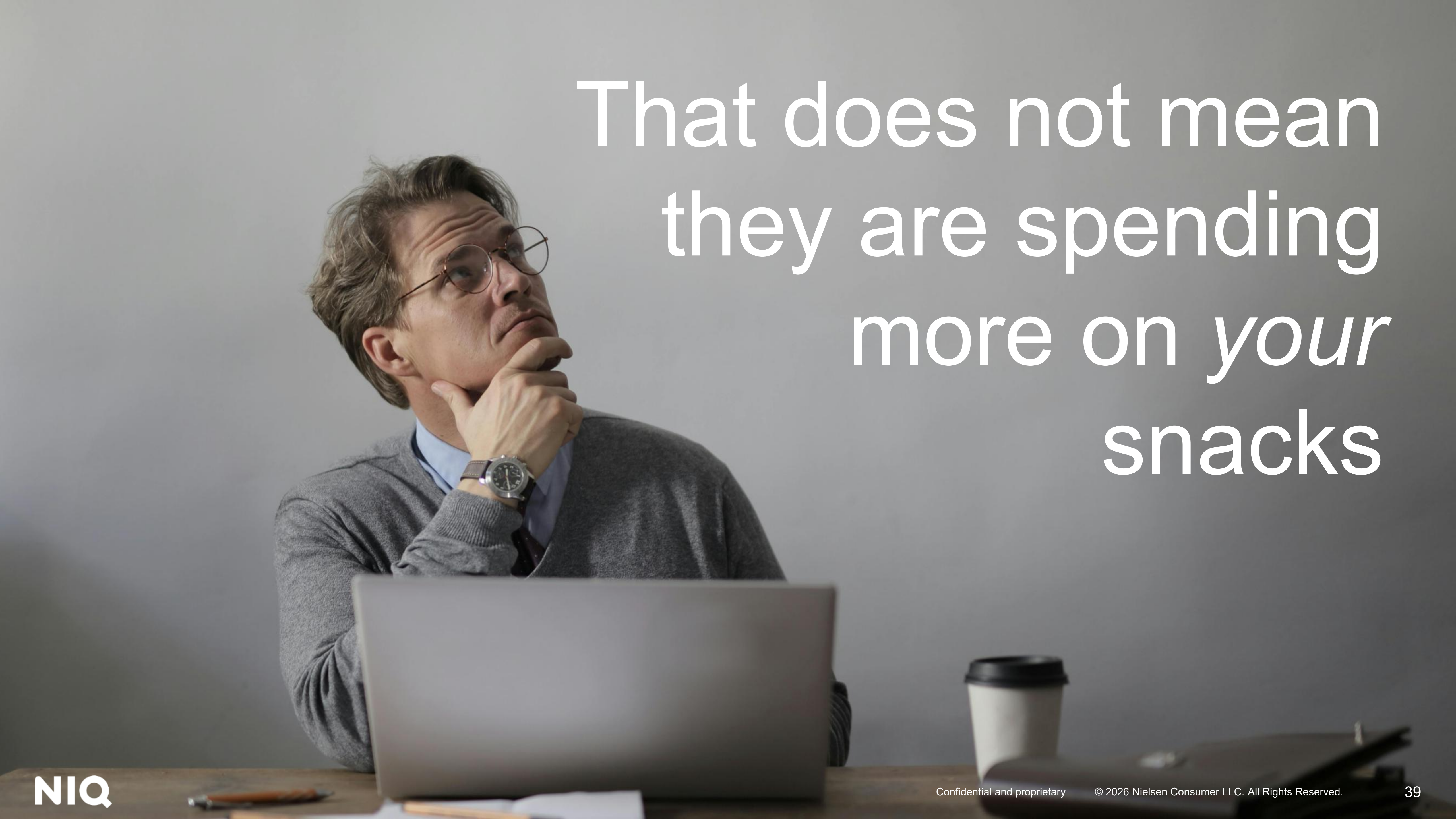
Source: NIQ, BASES Snacking Survey, n=2,024, 2026

GLP-1 households spend more on snacks

Snack Dollars Per Buyer



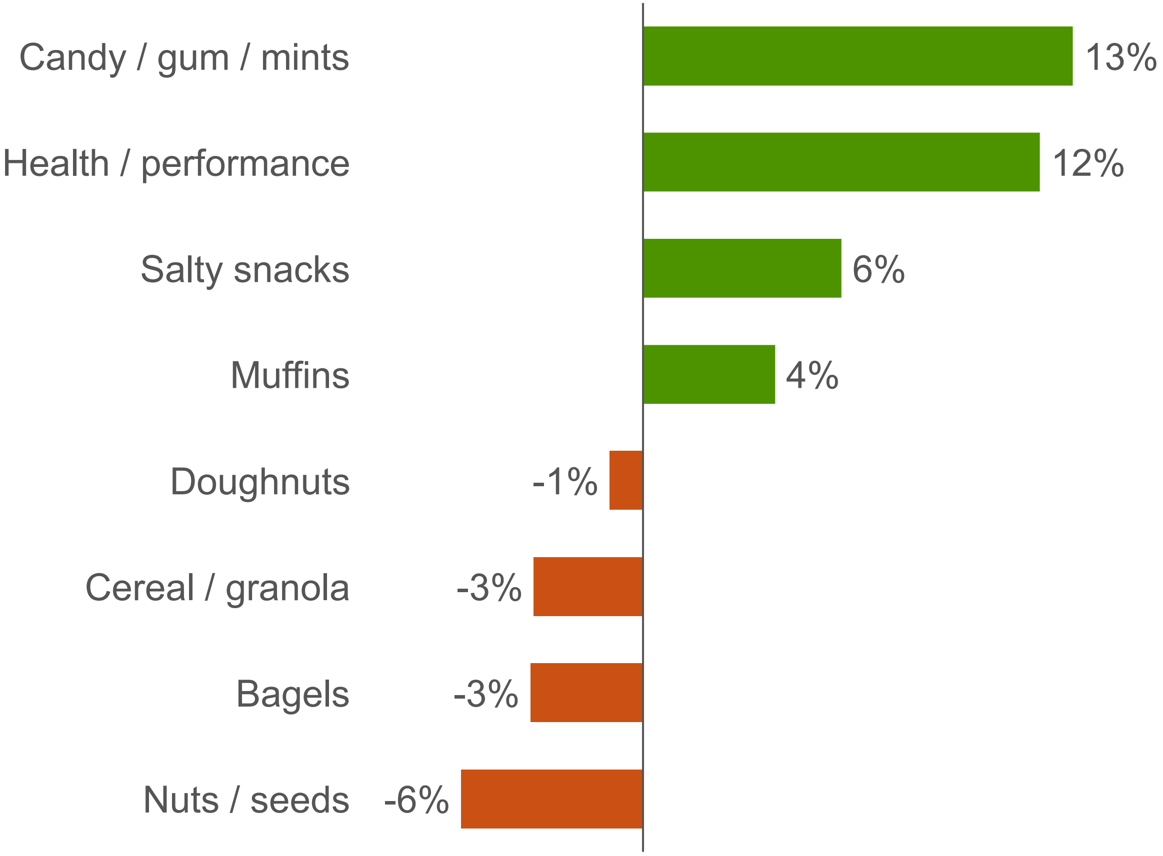
Source: NIQ, Expanded OmniShopper Panel On Demand, Powered By Syndicated GLP-1 Survey In Discover, Fielded March 2026, Total US, Total Outlets, Total Snacking, 52 Weeks Ending 3/28/2026



That does not mean they are spending more on *your* snacks

GLP-1 shoppers are spending with intention

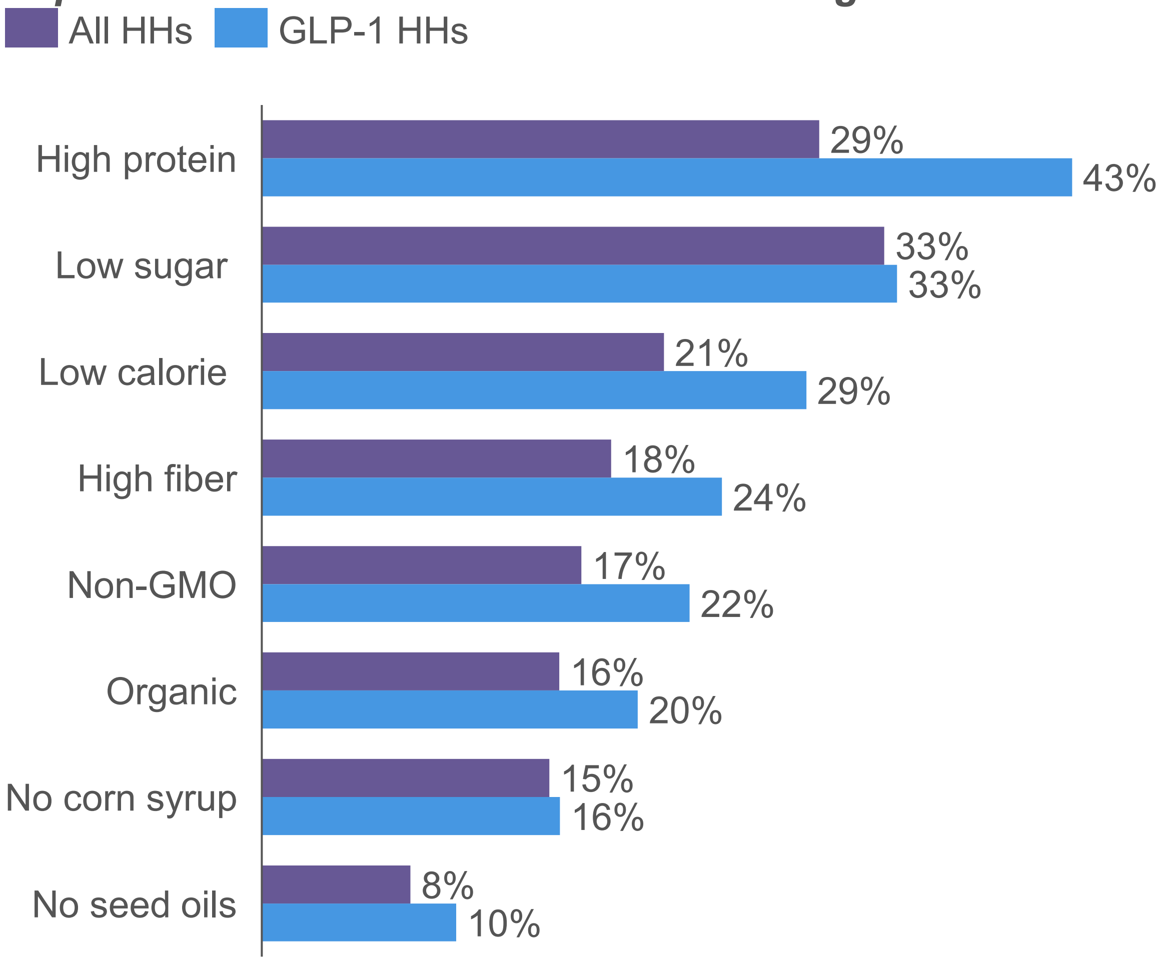
Dollar Per Buyer Difference, GLP-1 Vs. Non-GLP-1 HHs



Source: NIQ, Expanded OmniShopper Panel On Demand, Powered By Syndicated GLP-1 Survey In Discover, Fielded March 2026, Total US, Total Outlets, Total Snacking, 52 Weeks Ending 3/28/2026

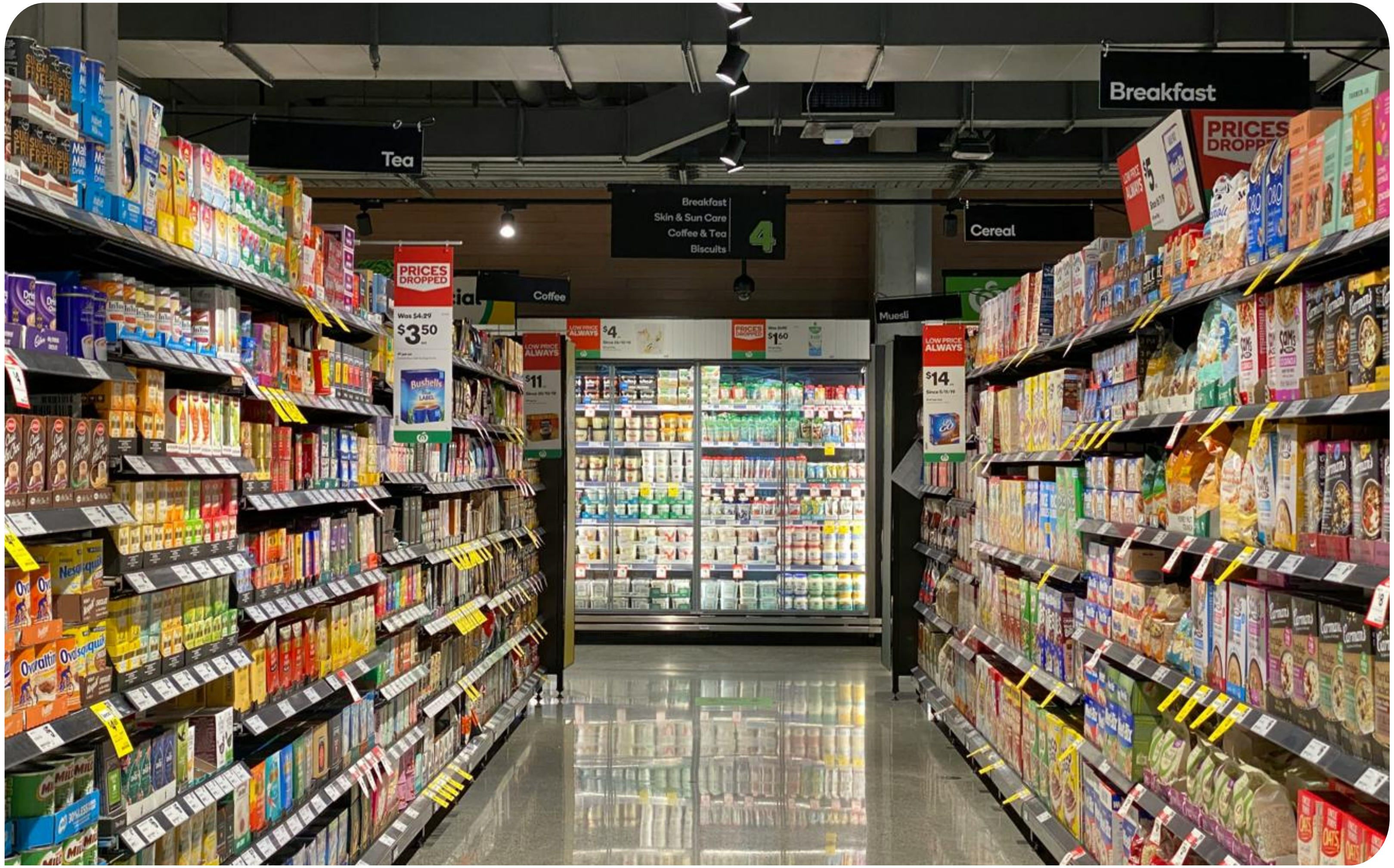
GLP-1 users prioritize Better For™ snacks

Important Characteristics When Choosing Snacks

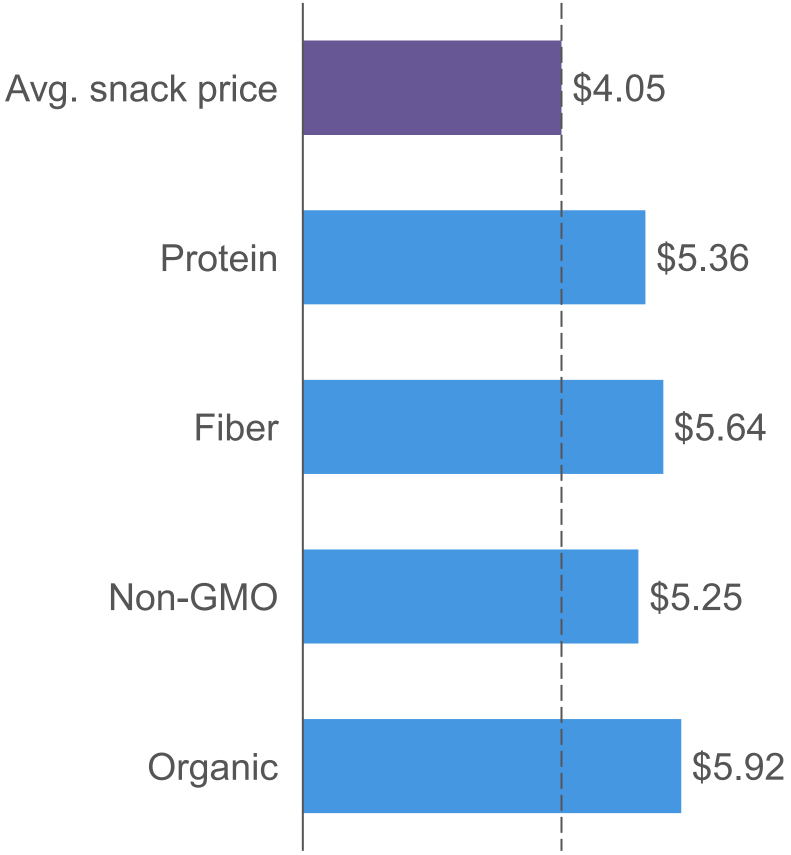


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Better For™ snacks cost more



Snack Average Unit Price With Claims

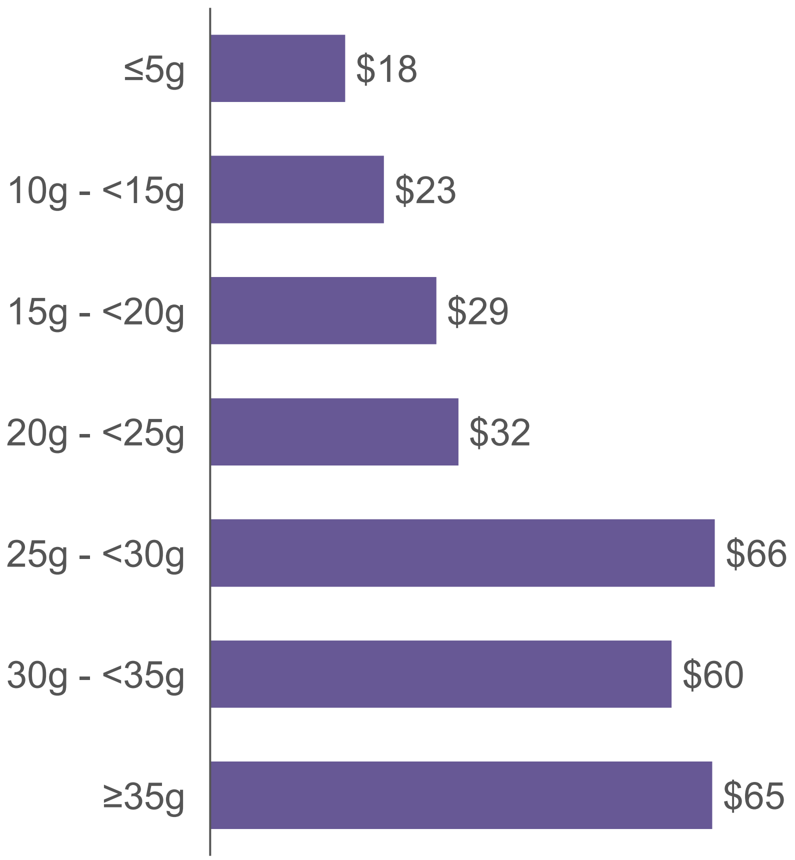


Source: NIQ, RMS, Powered By Product Insights, Total US, Total Snacking, 52-Weeks Ending 3/28/2026

As the benefit level scales, so does the price

Meat Snack Average Price Per Pound

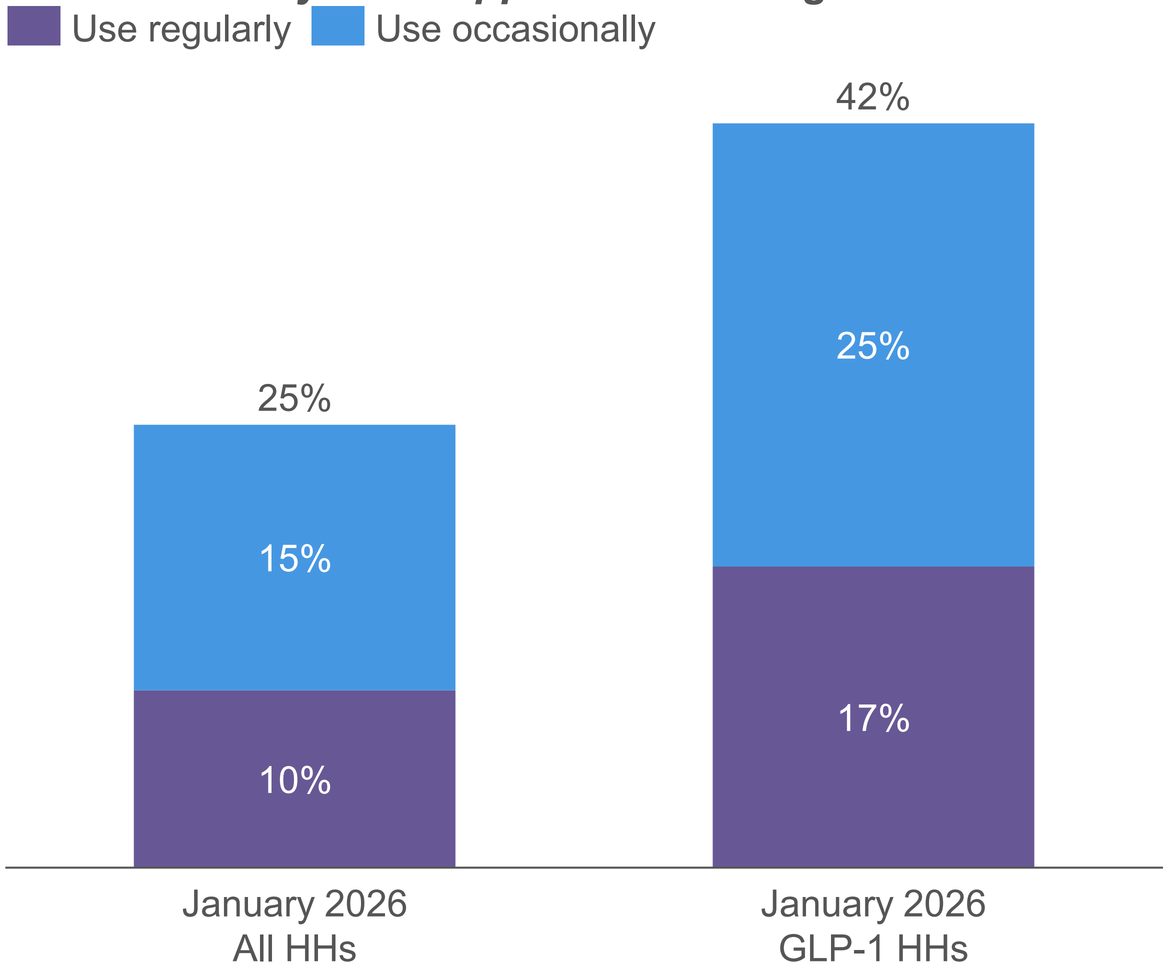
Based On Grams Of Protein Per Serving



Source: NIQ, RMS, Powered By Product Insights, Total US, Meat Snacks, 52-Weeks Ending 3/28/2026

GLP-1 shopping is app aided

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

Snacks that win a place in a GLP-1 basket are app influenced

GLP-1 shoppers are

2.9x more likely

to use scanning apps when deciding what snacks to buy

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

GLP-1 users want AI support

48%

of GLP-1 shoppers say they use AI to help with food and beverage product recommendations

(***163 index to total respondents***)

Source: NIQ, BASES Snacking Survey, n=2,007, 2026

Vetting is a core AI role for GLP-1 shoppers

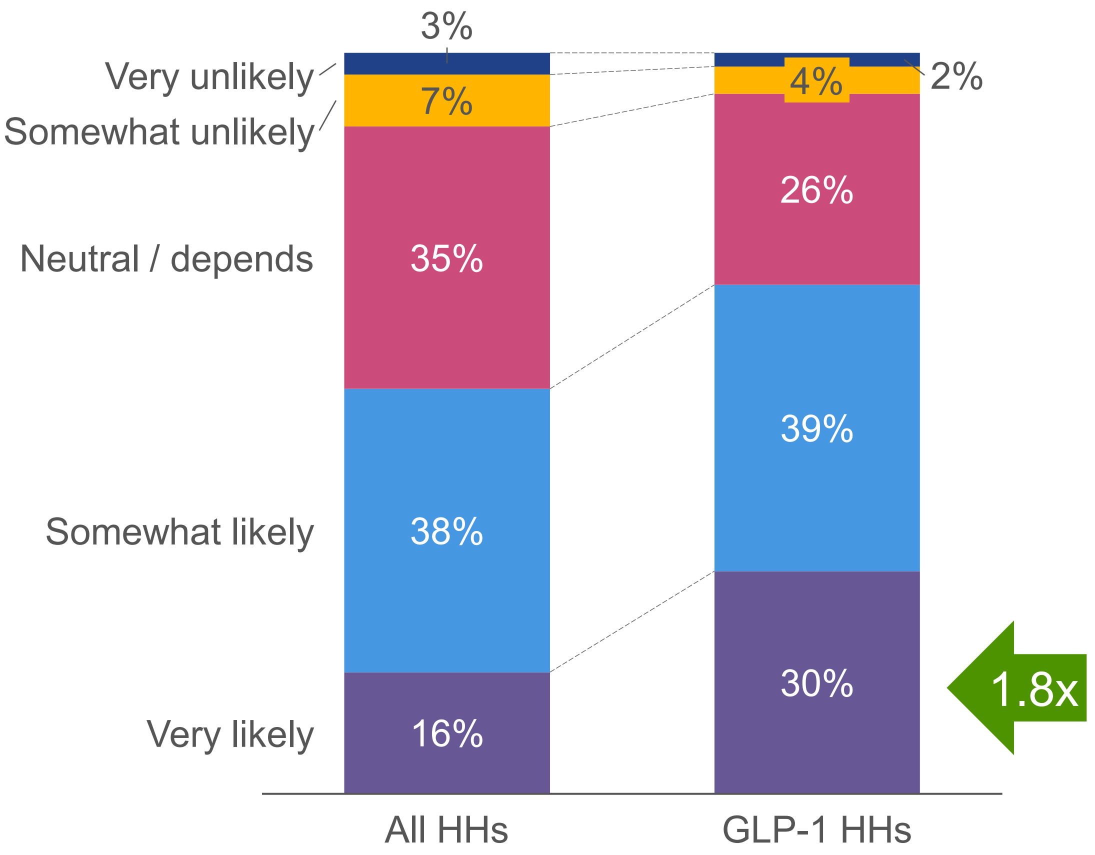
Most Important Factors In AI F&B Recommendations

GLP-1 Shoppers Indexed To Total Respondents

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

AI impacts GLP-1 user product choice more

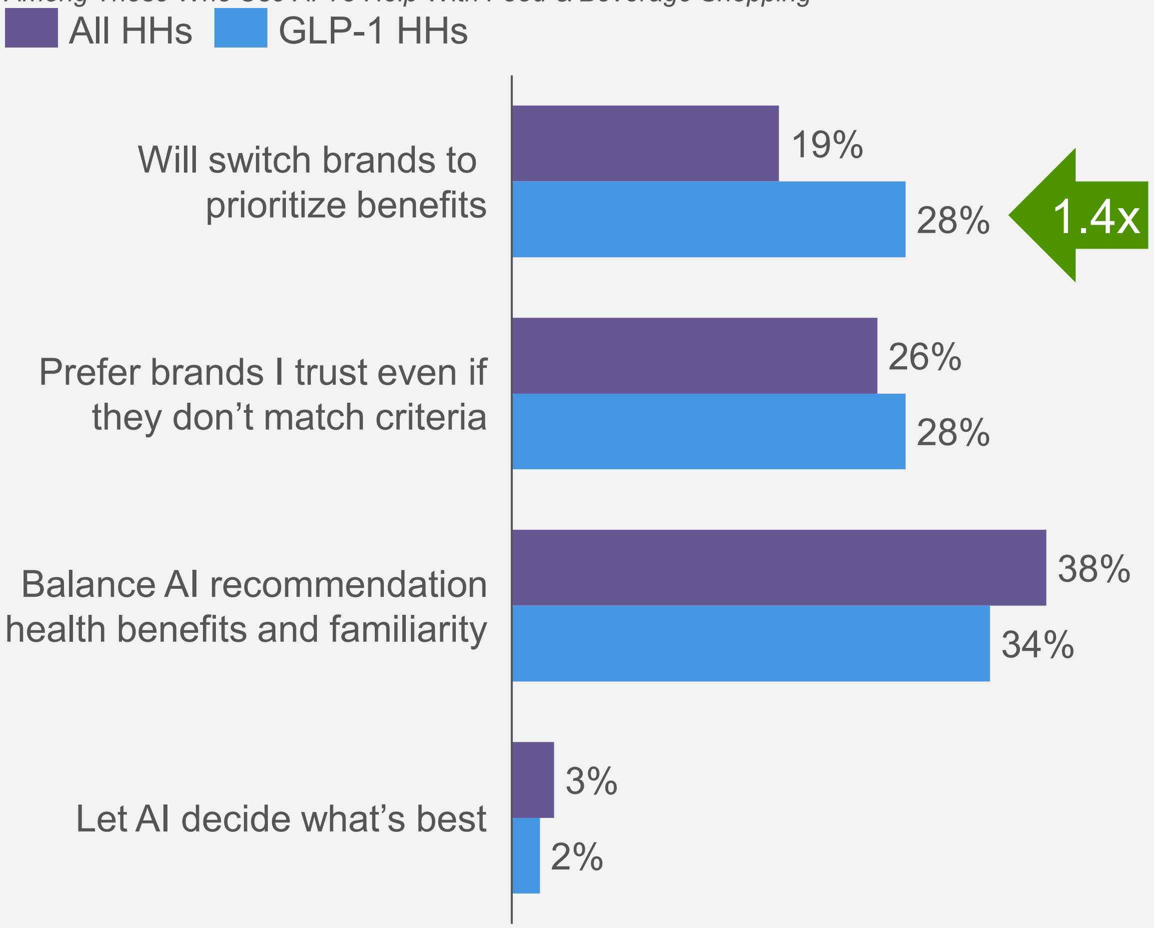
Likelihood Of Choosing An Unfamiliar AI-Recommended Food Or Beverage That Meets Health / Nutrition Goals



GLP-1 users are less loyal to brands with AI

Trade-Offs When Shopping With Artificial Intelligence

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



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

GLP-1 users want AI to help them find better products, not save money

GLP-1 users want more AI focus on…

Recommending new products that fit needs better

135

index

Meeting specific nutritional targets (i.e., grams of protein per day)

126

index

Staying within budget / meeting spending goals

76

index

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

GLP-1 shoppers granted permission

The protein paradox

Protein is important…

…but we don't know if we are getting enough of it…

…and we don't feel confident identifying it

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

Despite this, shoppers want more

60%

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

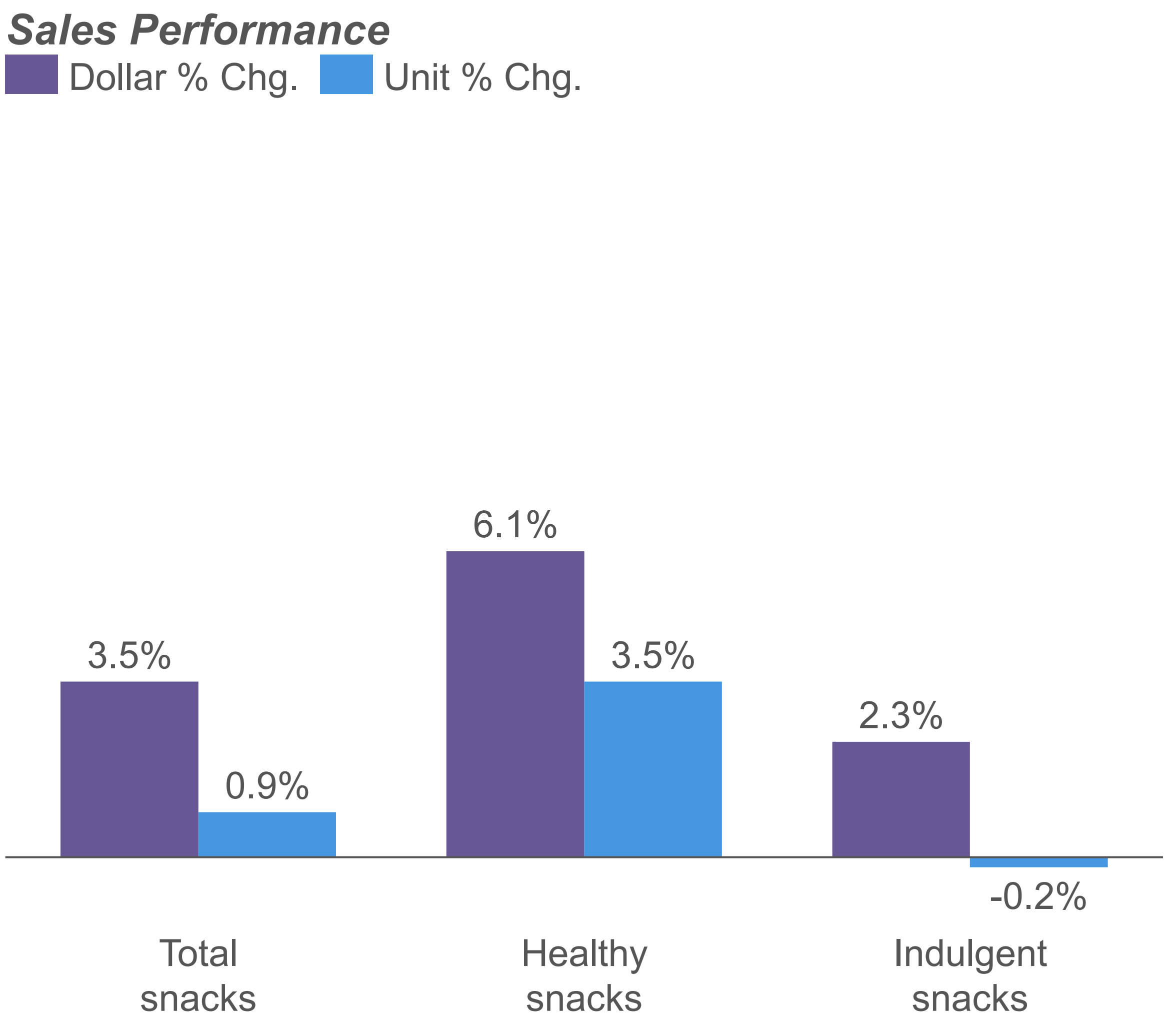
Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025

"Protein" alone is a powerful word

Bought A Product Just Because Package Said "Protein"

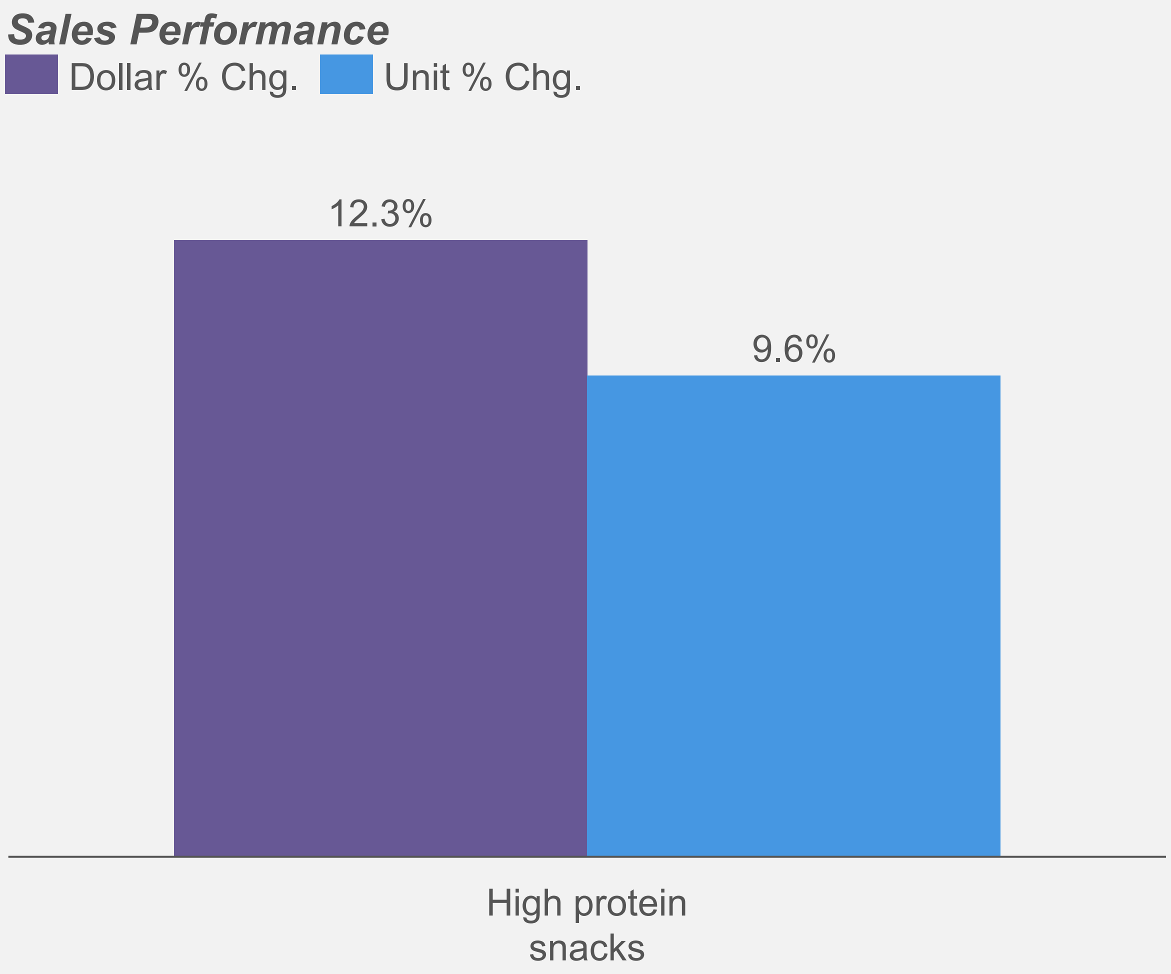
Source: NIQ, BASES Quick Question Protein Survey, n=1,020, 2025

Healthy is outpacing indulgent



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

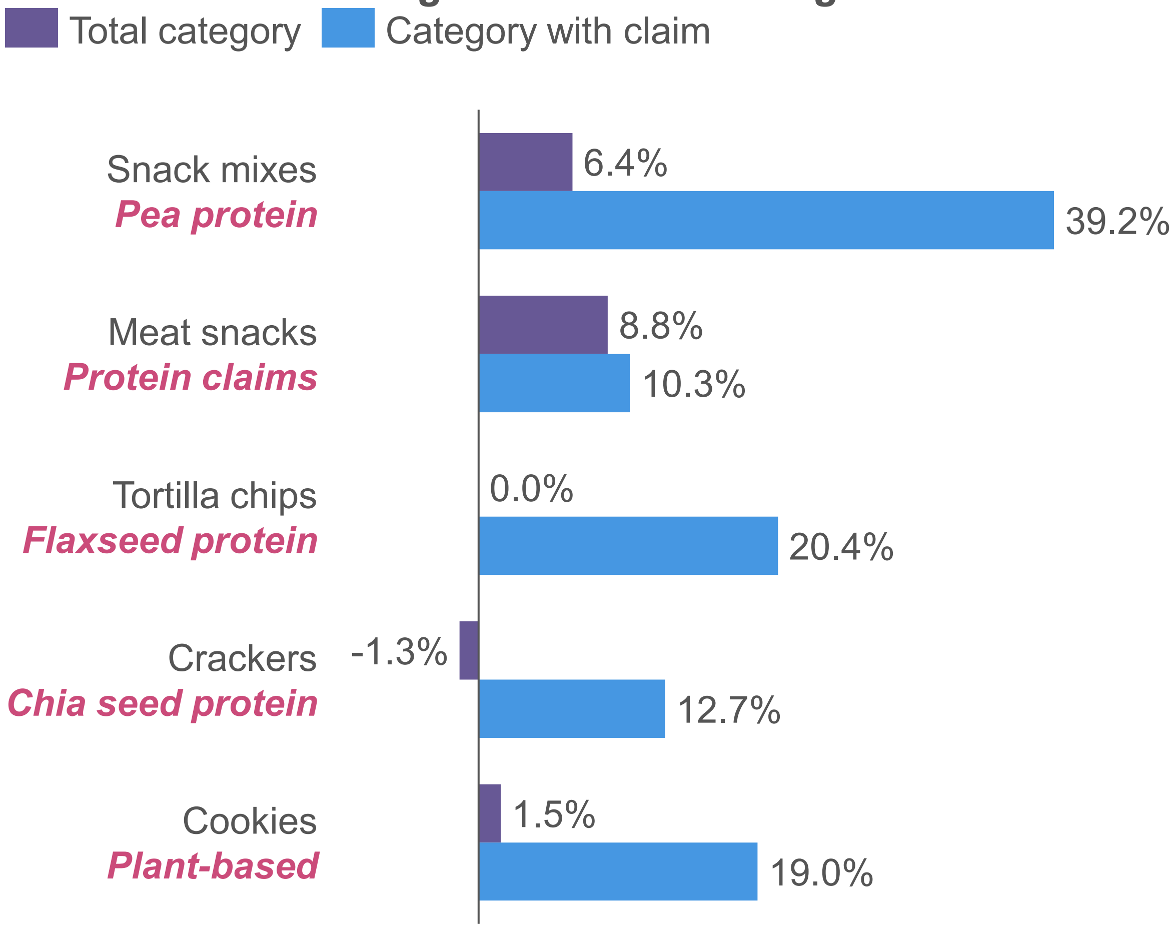
High protein snacking is growing even faster



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

Protein claims matter to shoppers

Dollar Sales % Change Based On Package Claims



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

The search for protein, is more than a search for protein

Sometimes the search is for protein, and the presence of something else

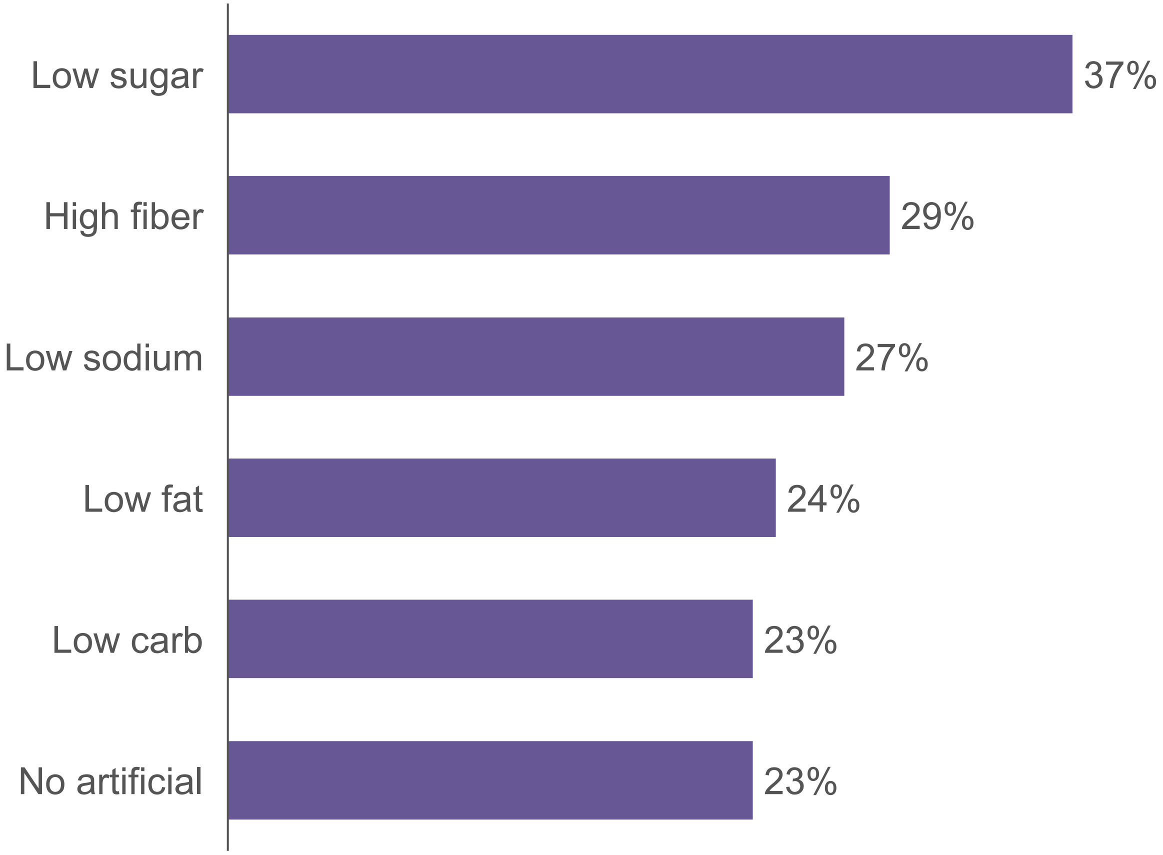
78%

of shoppers are seeking secondary claims in addition to “protein”

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

Shoppers are looking for protein and beyond

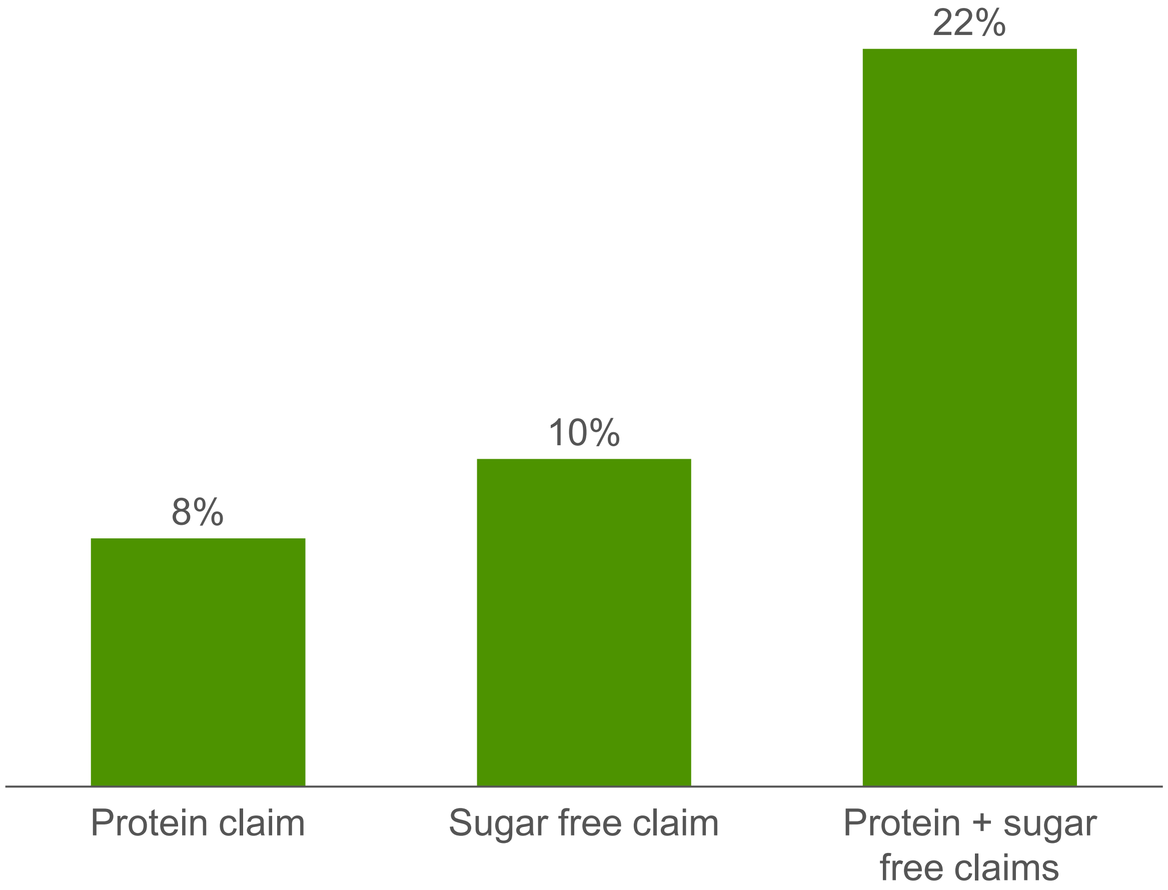
Most-Desired Secondary Characteristics In High-Protein Products



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

Stack intentionally to drive growth

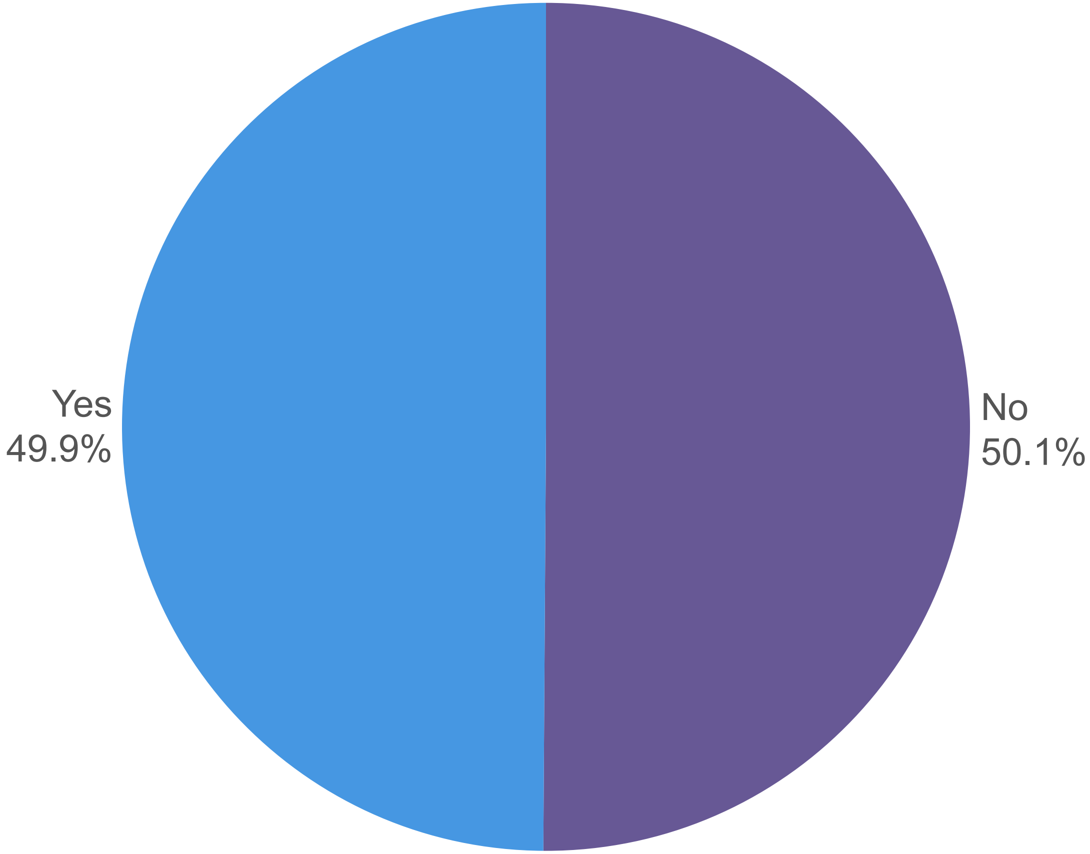
Food & Beverage Dollar Sales Performance



Source: NIQ, RMS, Powered By Product Insights, Stated FDA Protein Claims, Total US Full View, 52-Weeks Ending 3/21/2026

Consumers are split on fiber intake

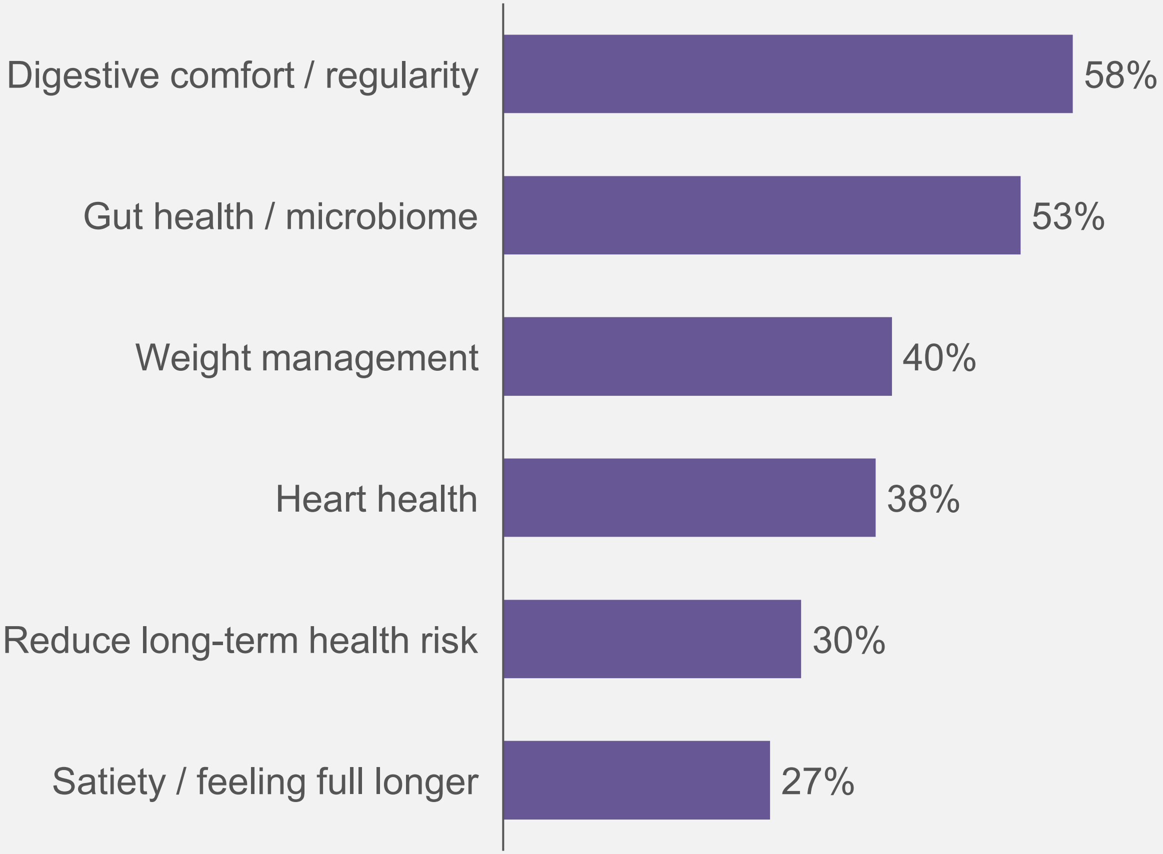
Actively Trying To Increase Daily Fiber Intake



Source: NIQ, BASES Quick Question Fiber Survey, n=2,029, 2026

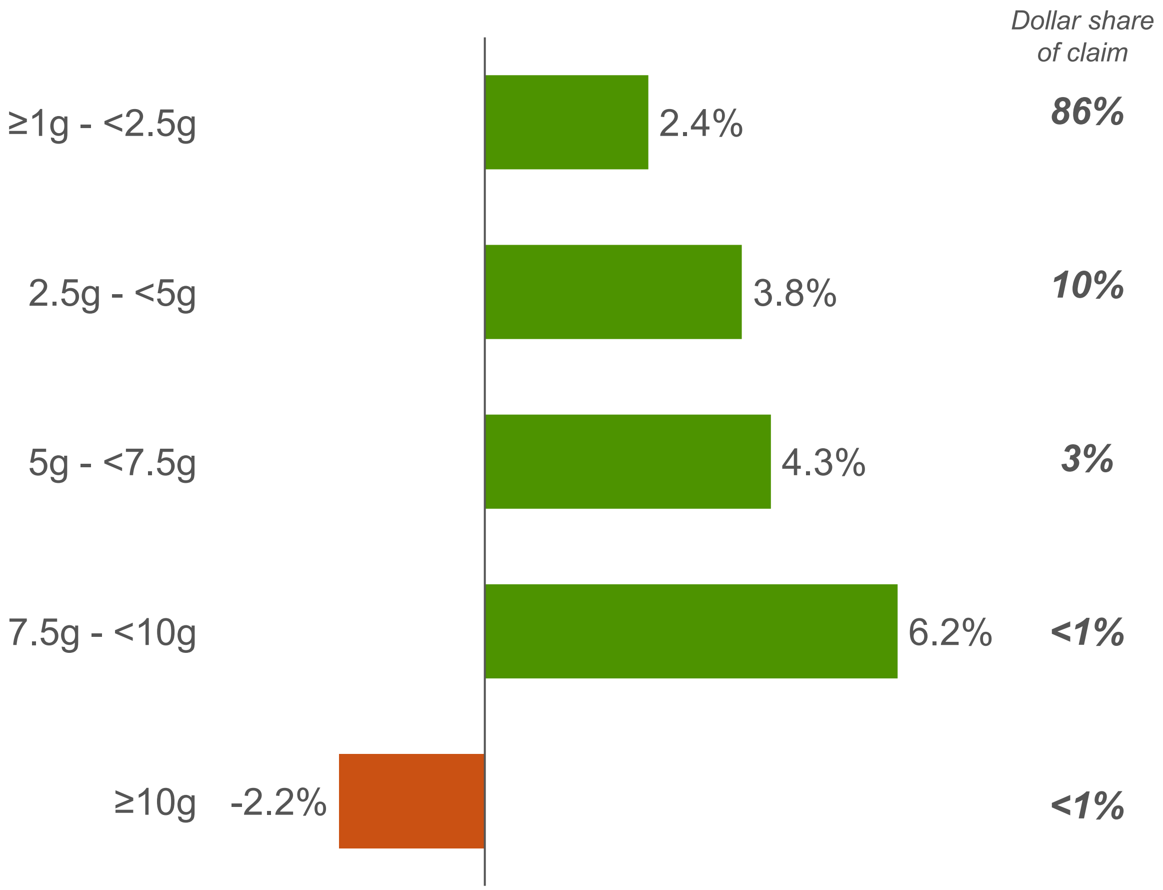
Digestion & gut health are leading motivators

Leading Reasons For Increased Fiber Consumption



Most snacks have under 2.5 grams / serving

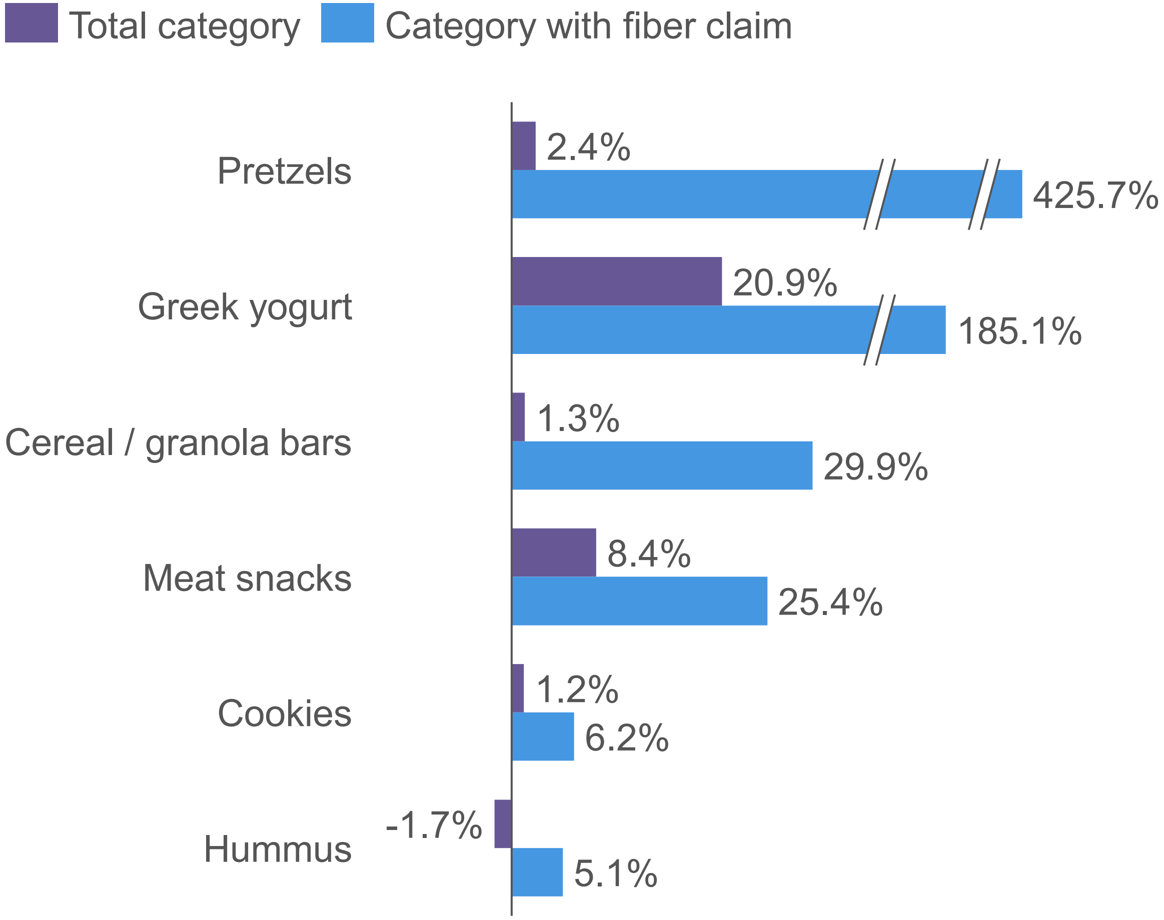
Snack Dollar Performance, Grams Of Fiber Per Serving



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

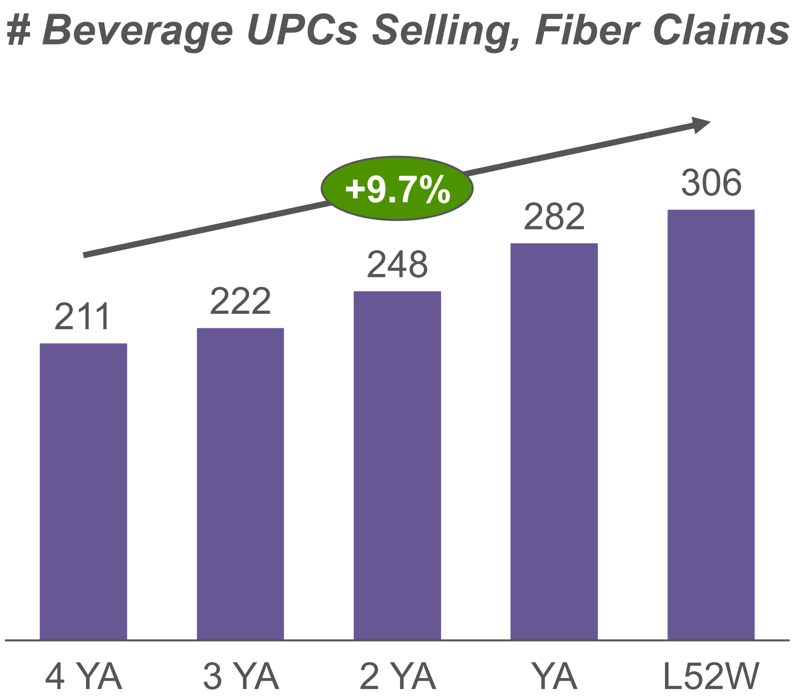
Fiber is taking off across snacking

Dollar Sales % Change Based On Package Claims



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

Fiber is front and center in the functional beverage boom



+85% *Dollar growth in beverages with fiber claims*

Source: NIQ, RMS, Powered By Product Insights, Total US Full View + Conv., 52-Weeks Ending 5/16/2026

Yes, beverages are snacks

Consumers think of beverages as snacks; food brands need to catch up

32%

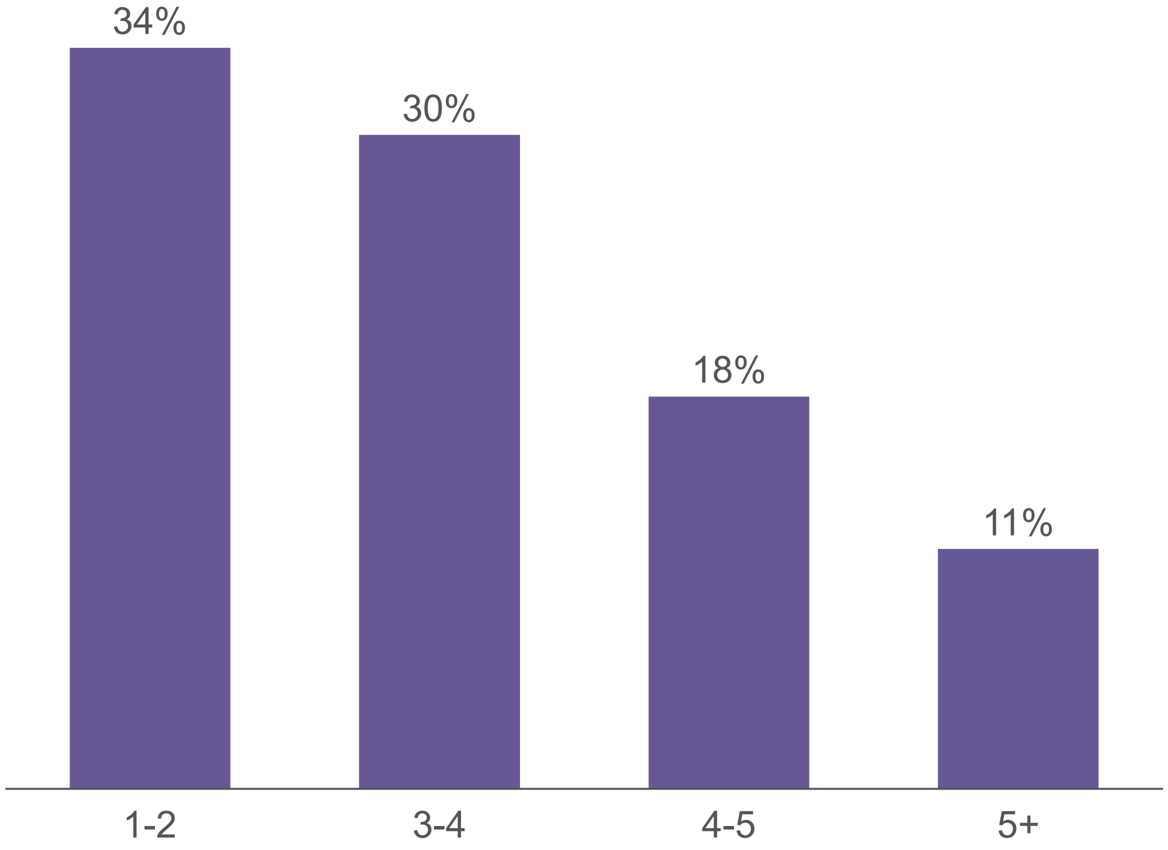
of shoppers say they consider beverages as a snack

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

93% are replacing some food snacks*

Beverages Consumed Weekly Instead Of A Food Snack

Among Those Who Consider Beverages As Snacks

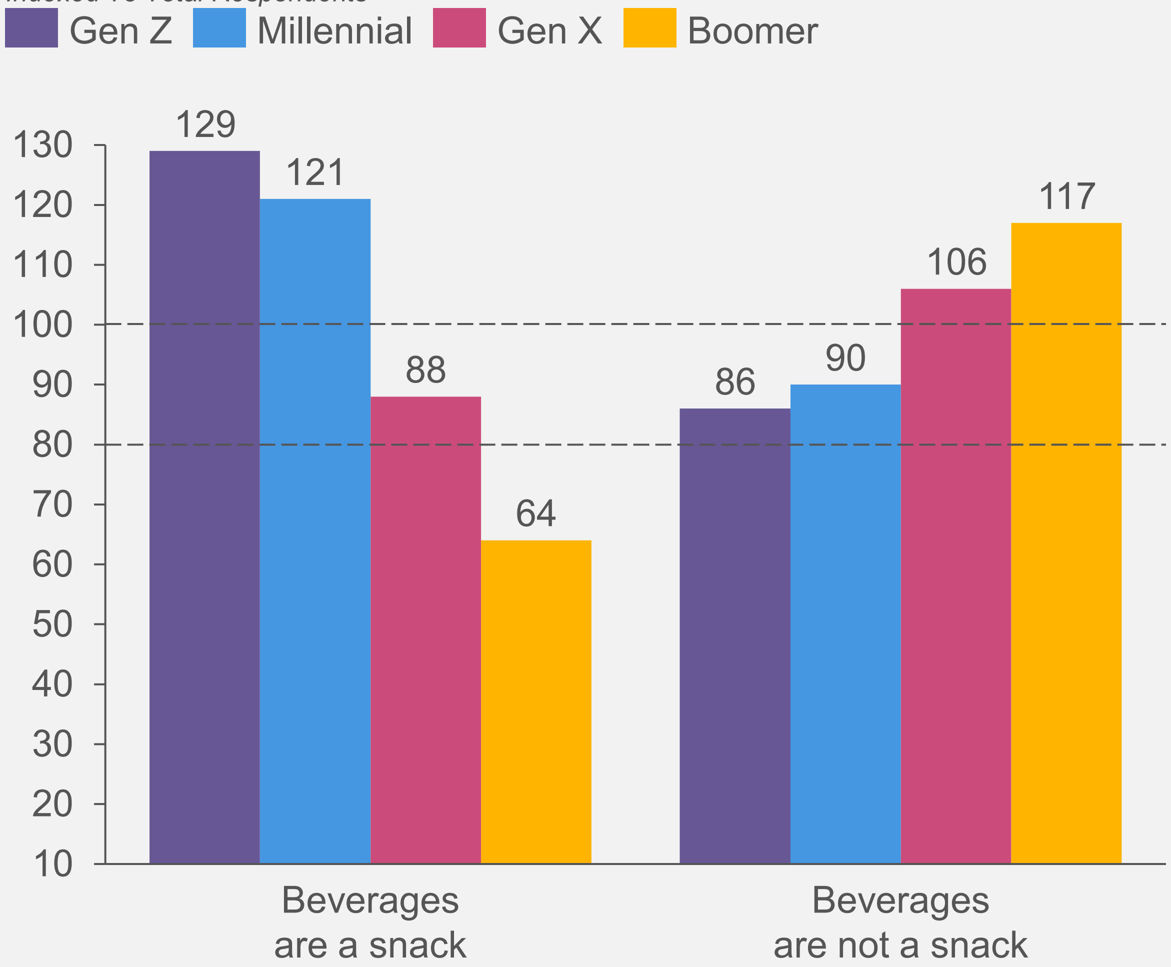


Source: NIQ, BASES Snacking Survey, n=2,024, 2026
Notes: *Among those who consider beverages to be snacks

This trend isn’t going away

Consider Beverages A Snack, By Generation

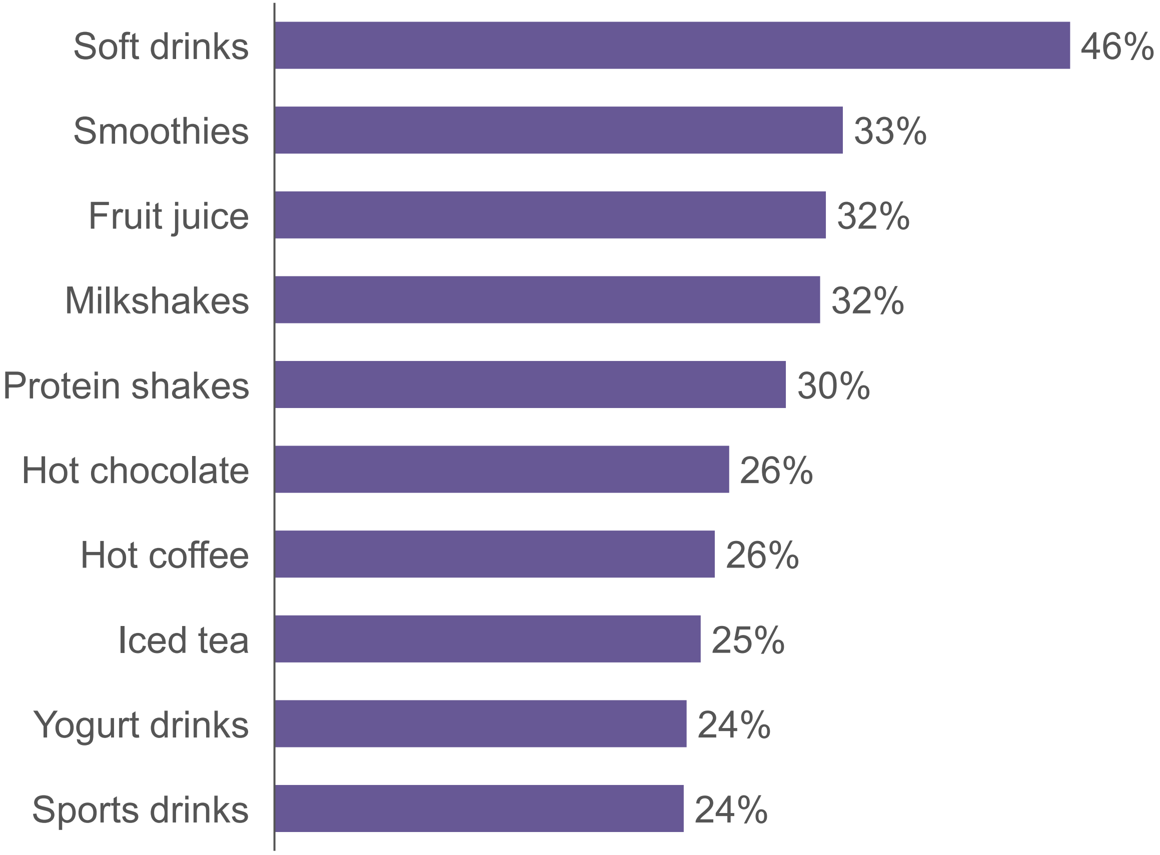
Indexed To Total Respondents



Soft drinks are the most snackable beverage

Favorite Snackable Beverages

Among Those Who Consider Beverages As Snacks



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

Gen Z has the broadest definition of what a snackable beverage is

Gen Z Snackable Beverages, Select Examples

Among Those Who Consider Beverages As Snacks, Gen Z Indexed To Total Respondents

Mocktails
239 Index

Bubble Tea
205 Index

Cold Pressed Juice
174 Index

Fz. Blended Coffee
160 Index

Functional Water
140 Index

Prebiotic Soft Drinks
138 Index

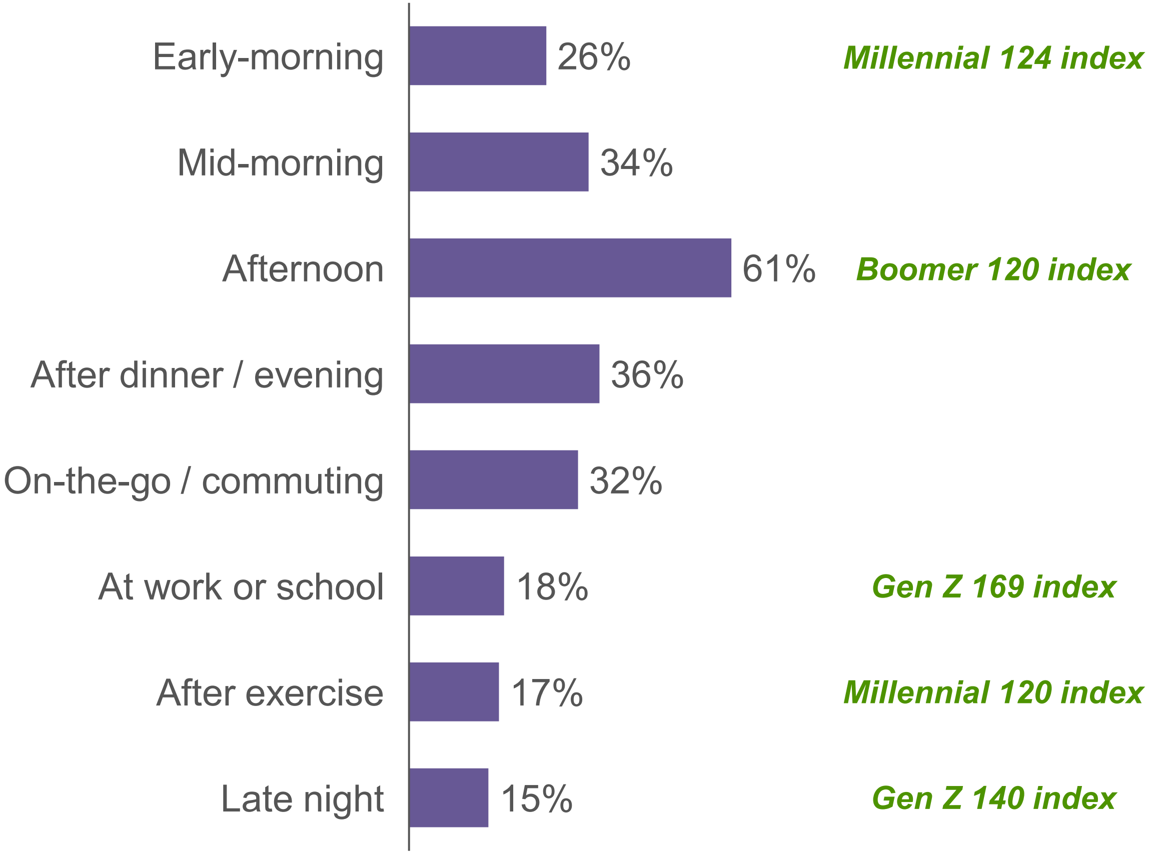
Arnold Palmer
126 Index

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

Dayparts do not constrain beverage snacking

Daypart When Beverages Used As A Snack

Among Those Who Consider Beverages As Snacks



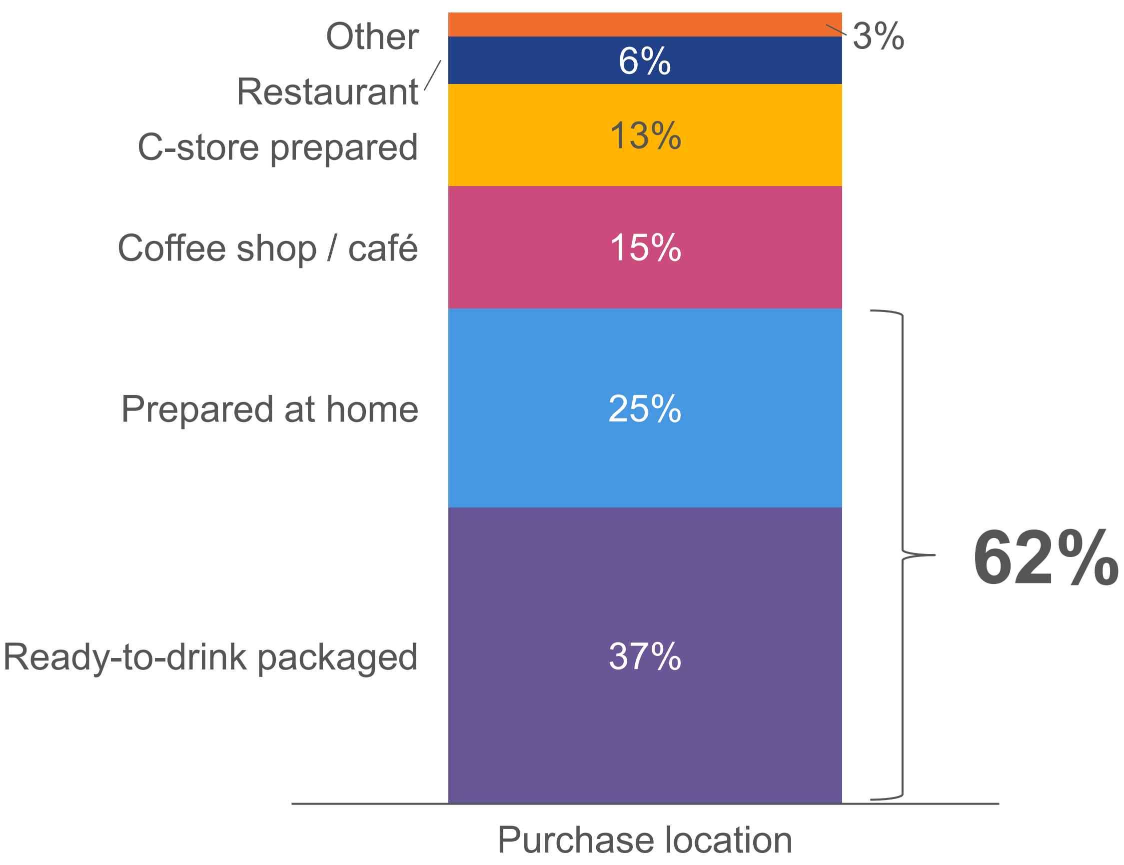
Source: NIQ, BASES Snacking Survey, n=2,009, 2026

Away from home is not the biggest competition

Most snackable beverages are CPG-sourced

Snackable Beverage Purchase Location

Among Those Who Consider Beverages As Snacks

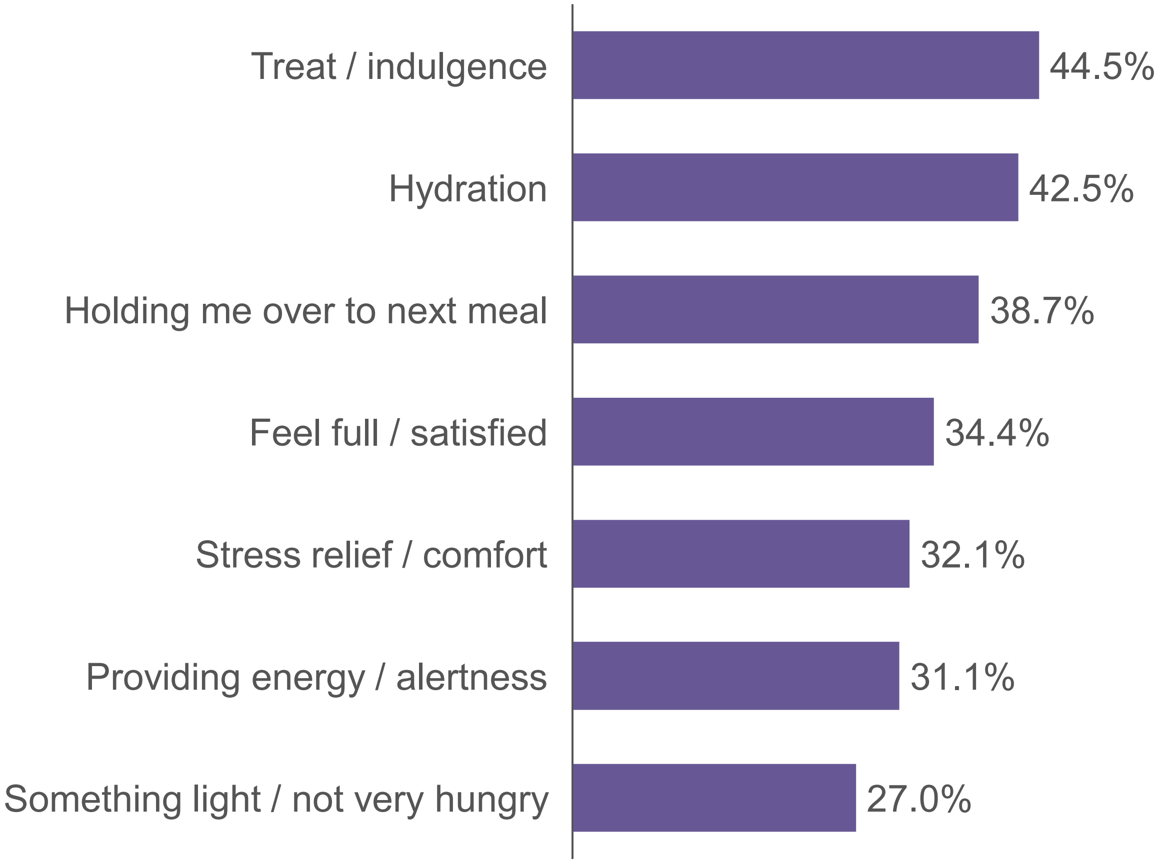


Source: NIQ, BASES Snacking Survey, n=2,009, 2026

Snackable beverages play a treating role

Role A Beverage Snack Plays

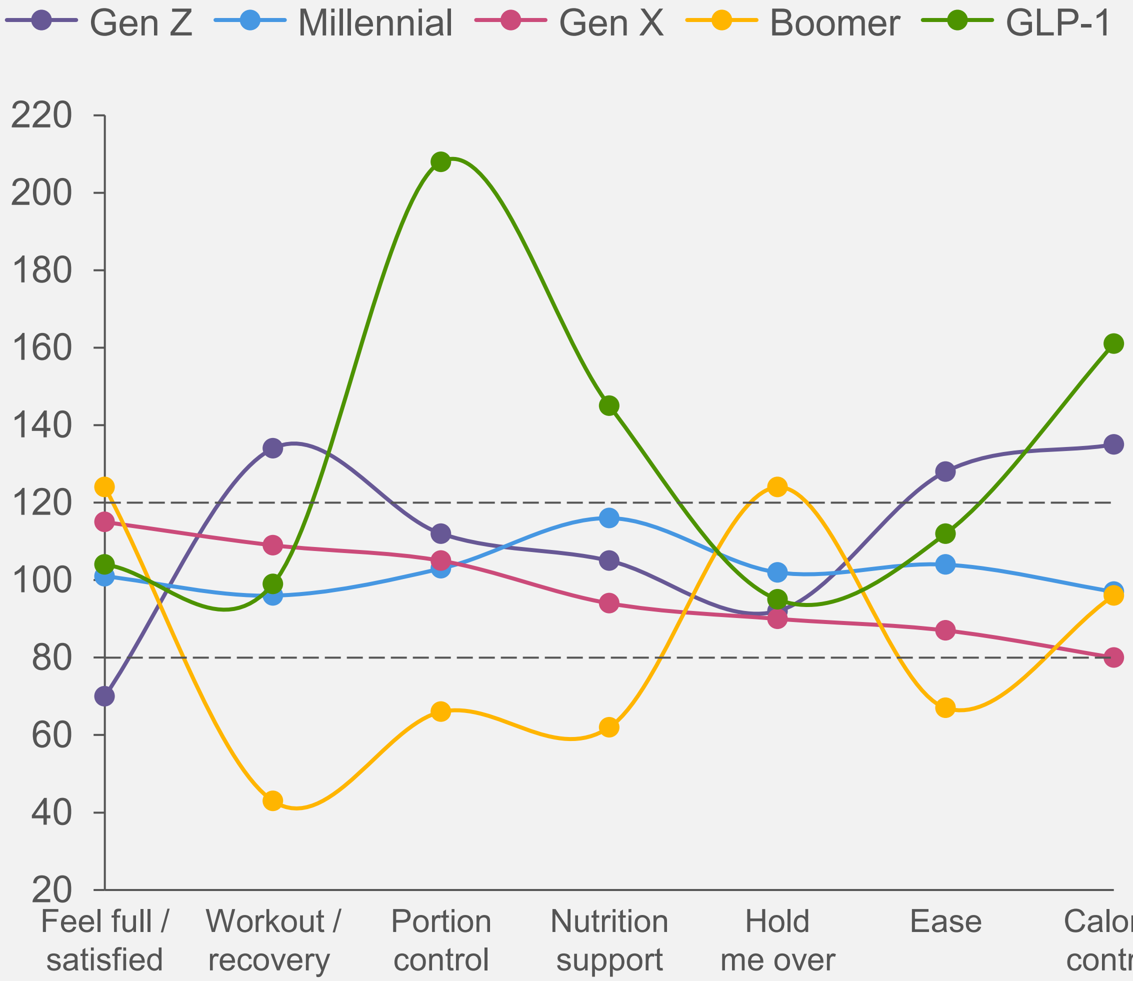
Among Those Who Consider Beverages As Snacks



Snackable beverages have many jobs to do

Role A Beverage Snack Plays, By Generation & GLP-1

Among Those Who Consider Beverages As Snacks

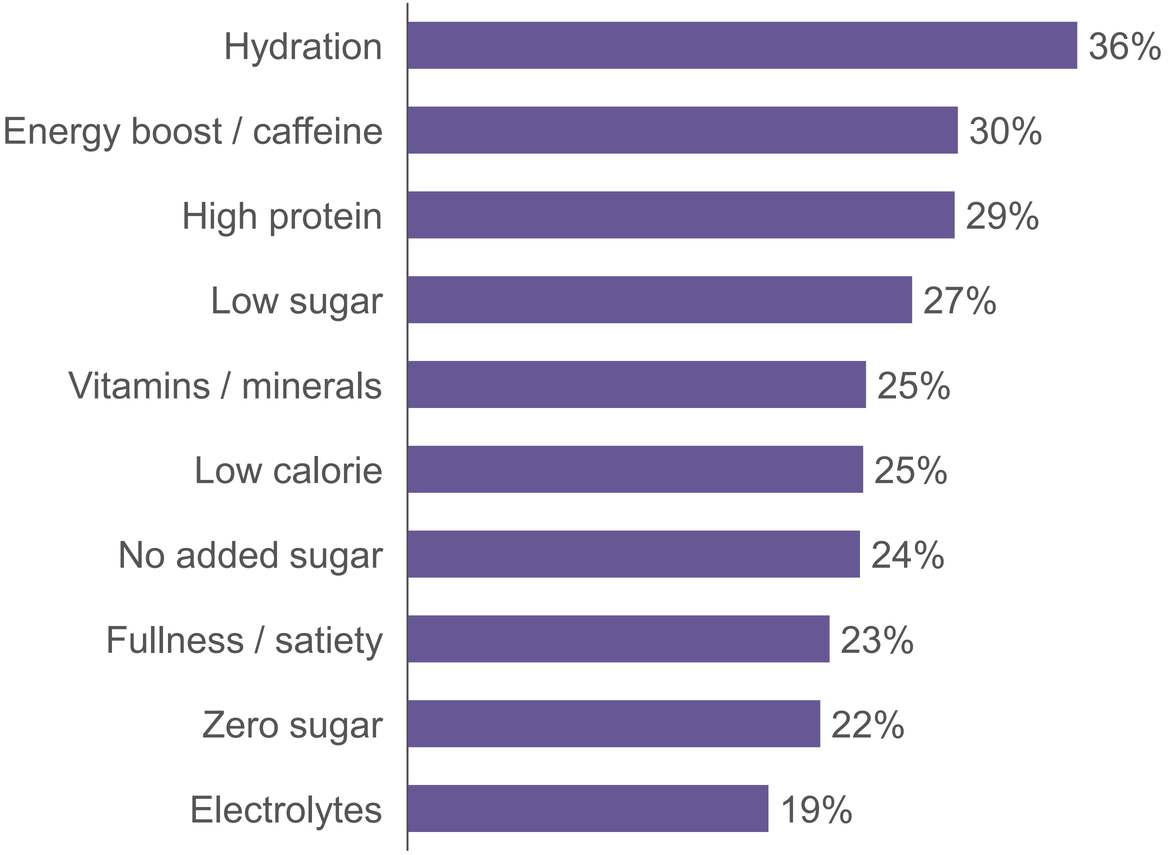


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Hydration, energy, & protein drive choice

Important Factors When Choosing Beverage Snacks

Among Those Who Consider Beverages As Snacks



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

Emerging benefits are leading consumers to snackable beverages

Emerging Factors When Choosing Beverage Snacks

Among Those Who Consider Beverages As Snacks

16%
Stress / mood support

15%
Pre / probiotics

13%
Focus / mental clarity

12%
Immune support

7%
Collagen

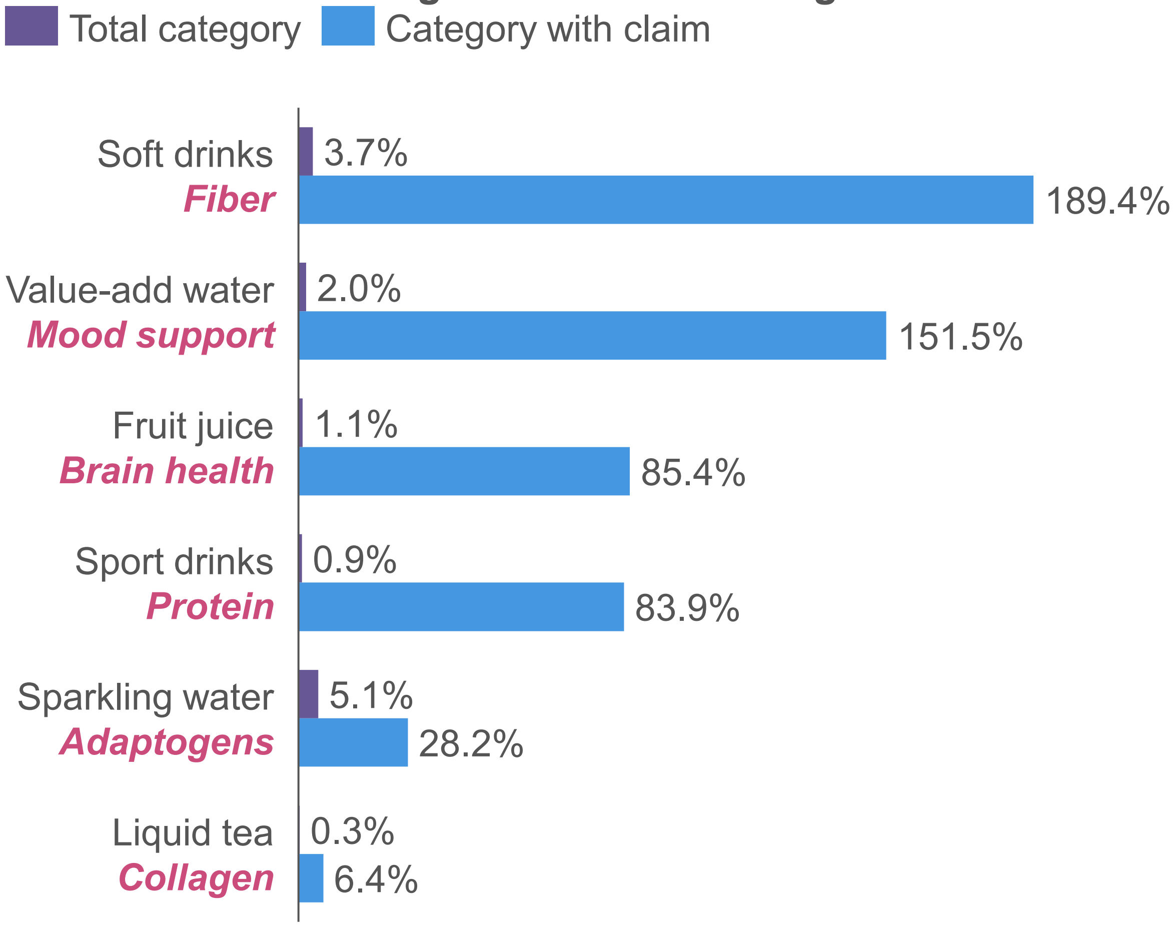
5%
Sleep support

4%
Adaptogens

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

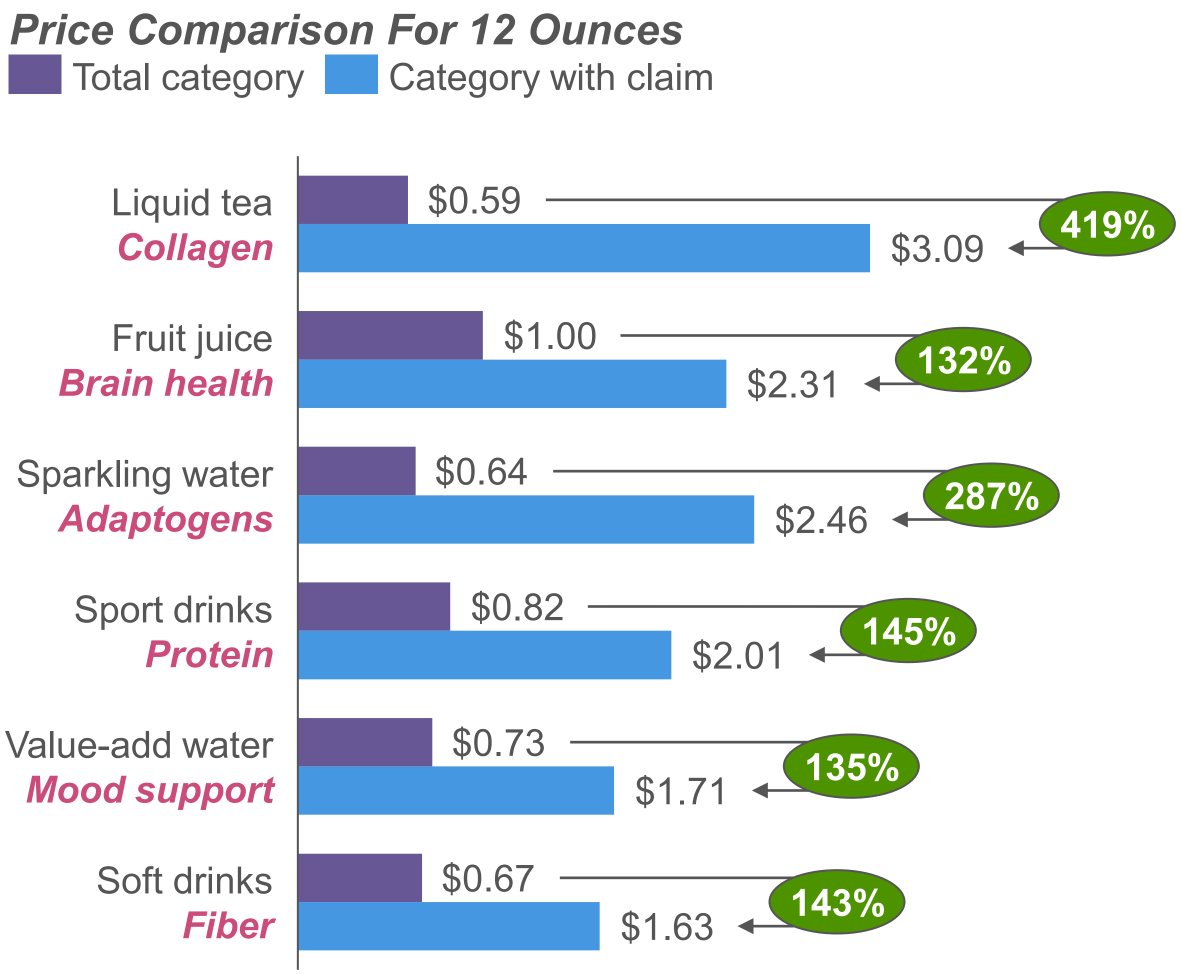
Functional claims matter to shoppers

Dollar Sales % Change Based On Package Claims



Source: NIQ, RMS, Powered By Product Insights, Total US Full View + Conv., 52-Weeks Ending 5/16/2026

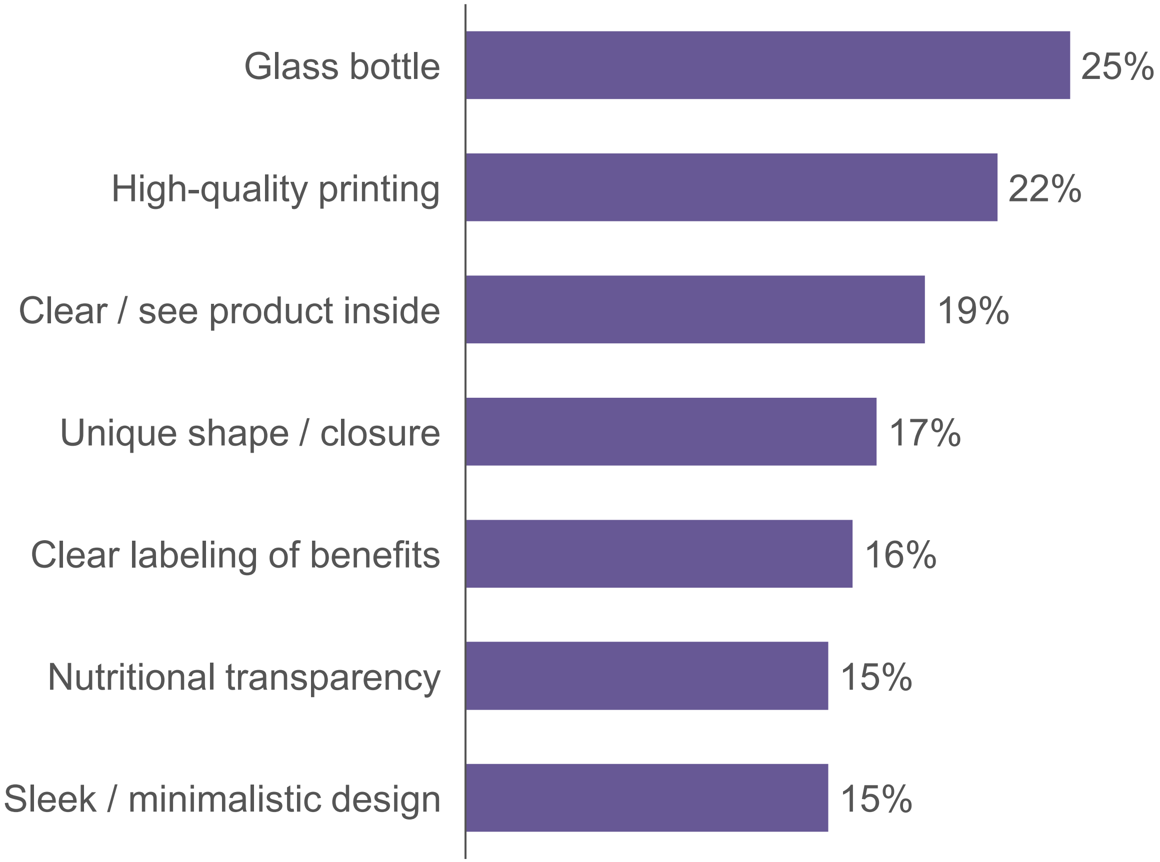
Claims like these command a premium



Source: NIQ, RMS, Powered By Product Insights, Total US Full View + Conv., 52-Weeks Ending 5/16/2026

Engineer the premium perception

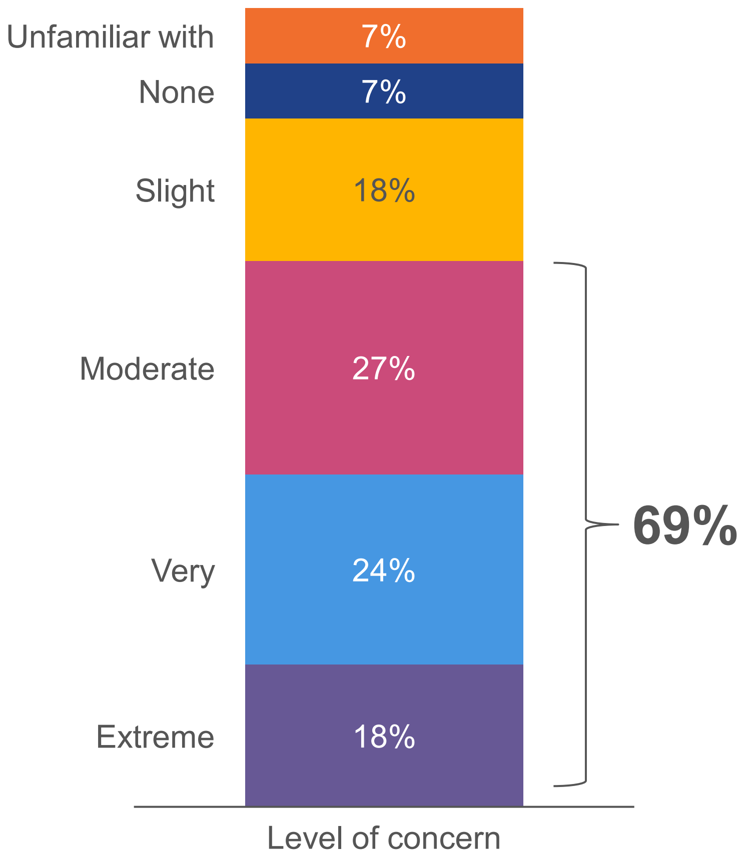
Features That Make A Beverage Package Feel Premium



Source: NIQ, BASES Beverage Survey, n=1,006, September 2025

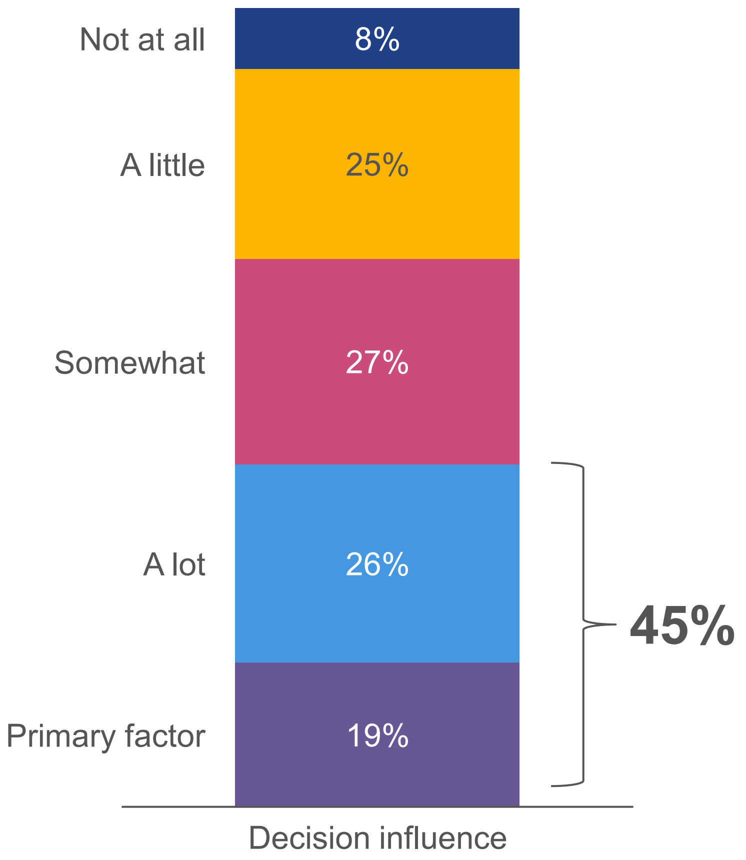
Beware the risk and opportunity of micro-plastics

Level Of Concern With Microplastics

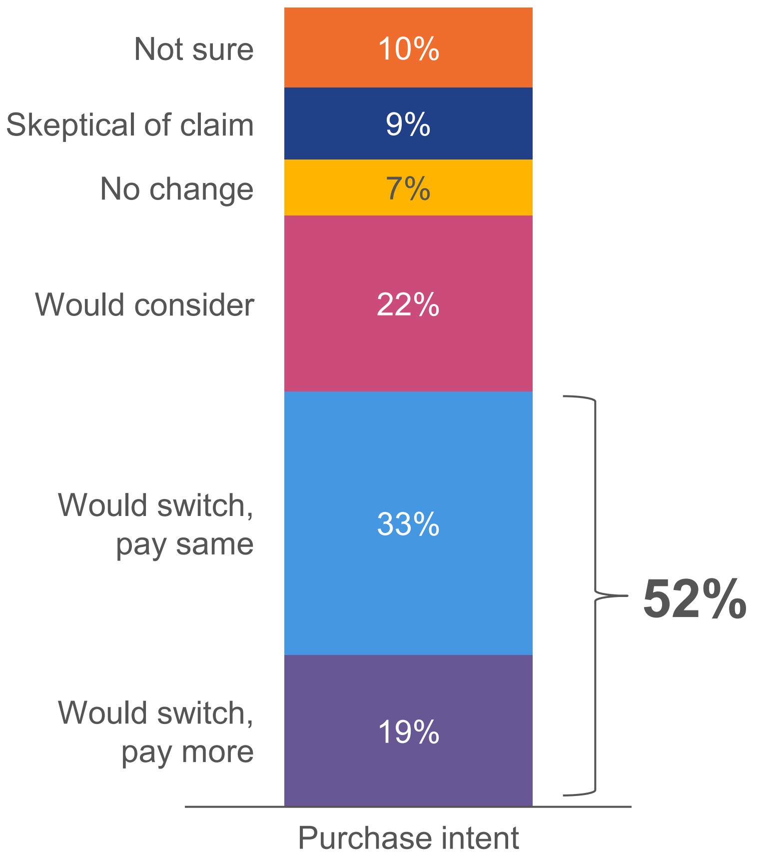


Extent That Microplastics Influence Choice

Among Those Concerned With Microplastics



"Microplastic-Free" Claim Purchase Intent

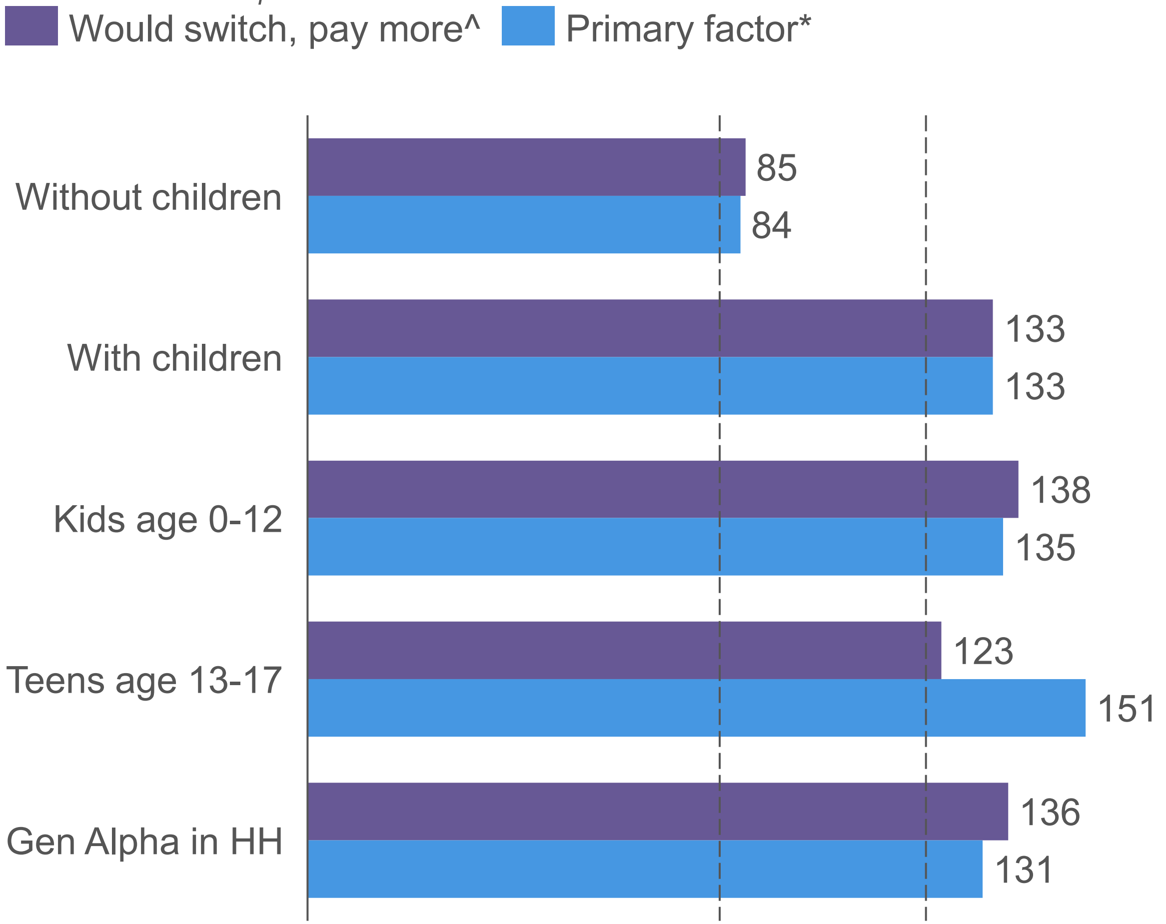


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Parents are most-focused on micro-plastics

Micro-Plastic Decision Impact & Purchase Intent

Indexed To Total Respondents



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

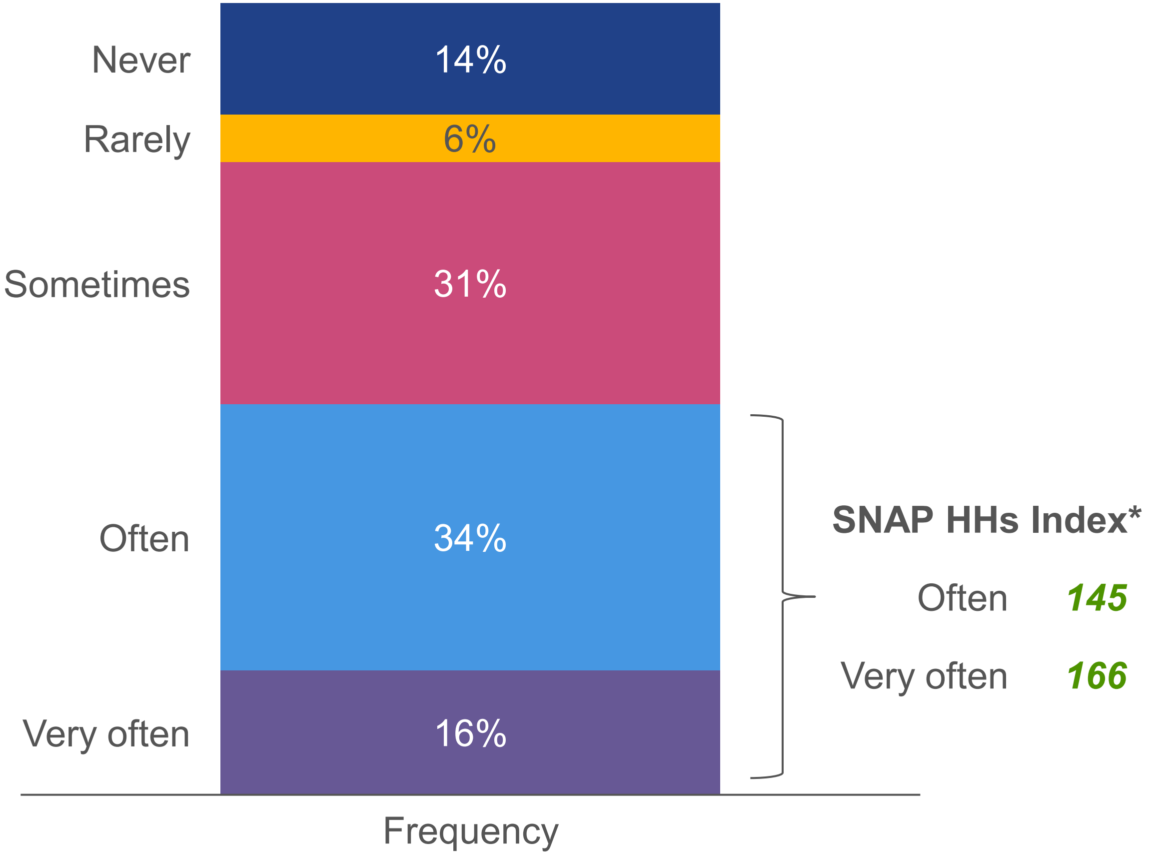
Notes: ^Would switch to a product with “micro-plastic-free” claim and would be willing to pay more; *Among those with concern over microplastics

Gen Alpha will expect even more

Gen Alpha is growing up on healthier snacks

Choose Snacks That Appear Indulgent, But Are Healthy

Among HHs With Gen Alpha Children Present

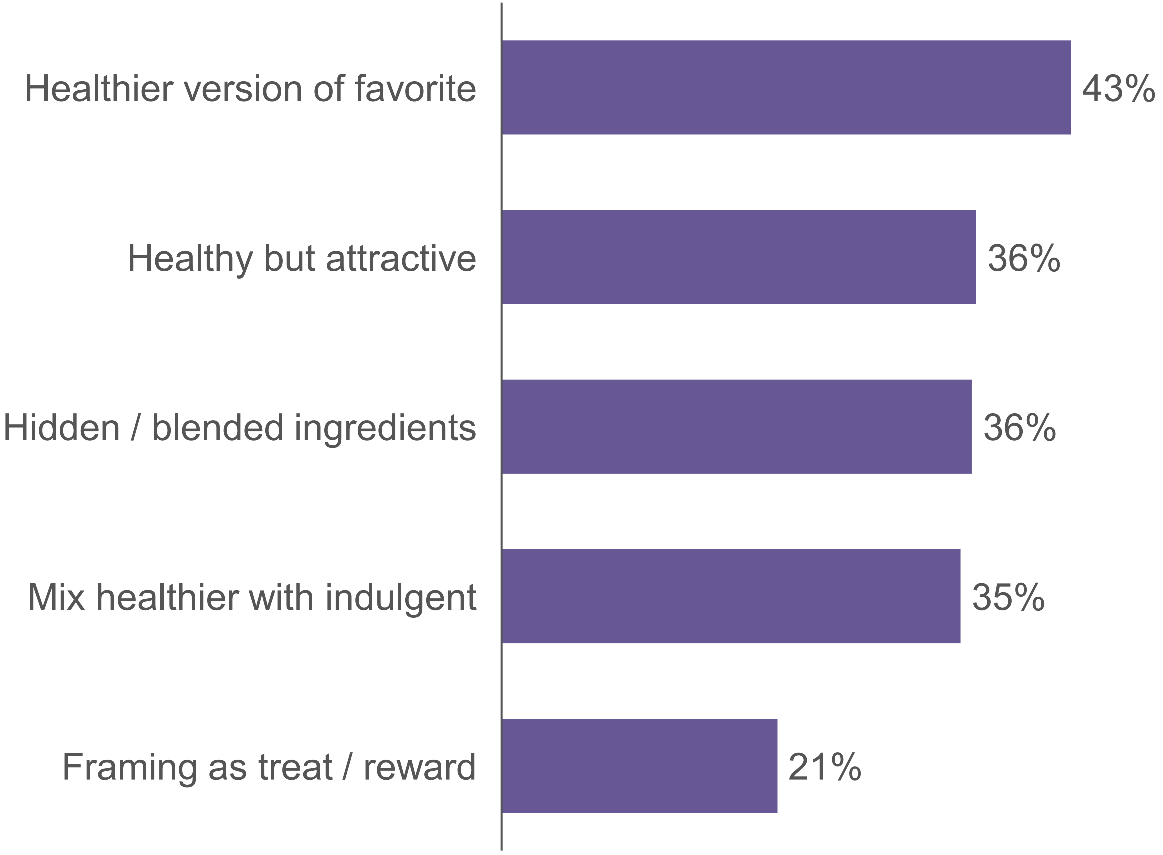


Source: NIQ, BASES Snacking Survey, n=2,024, 2026
Notes: *Among SNAP households that also have a Gen Alpha child present

Their parents are getting creative

Strategies To Make Healthier Snacks Appealing To Child

Among HHs With Gen Alpha Children Present



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

Parents are using aps to verify snack choices

Gen Alpha's parents are

2.0x more likely

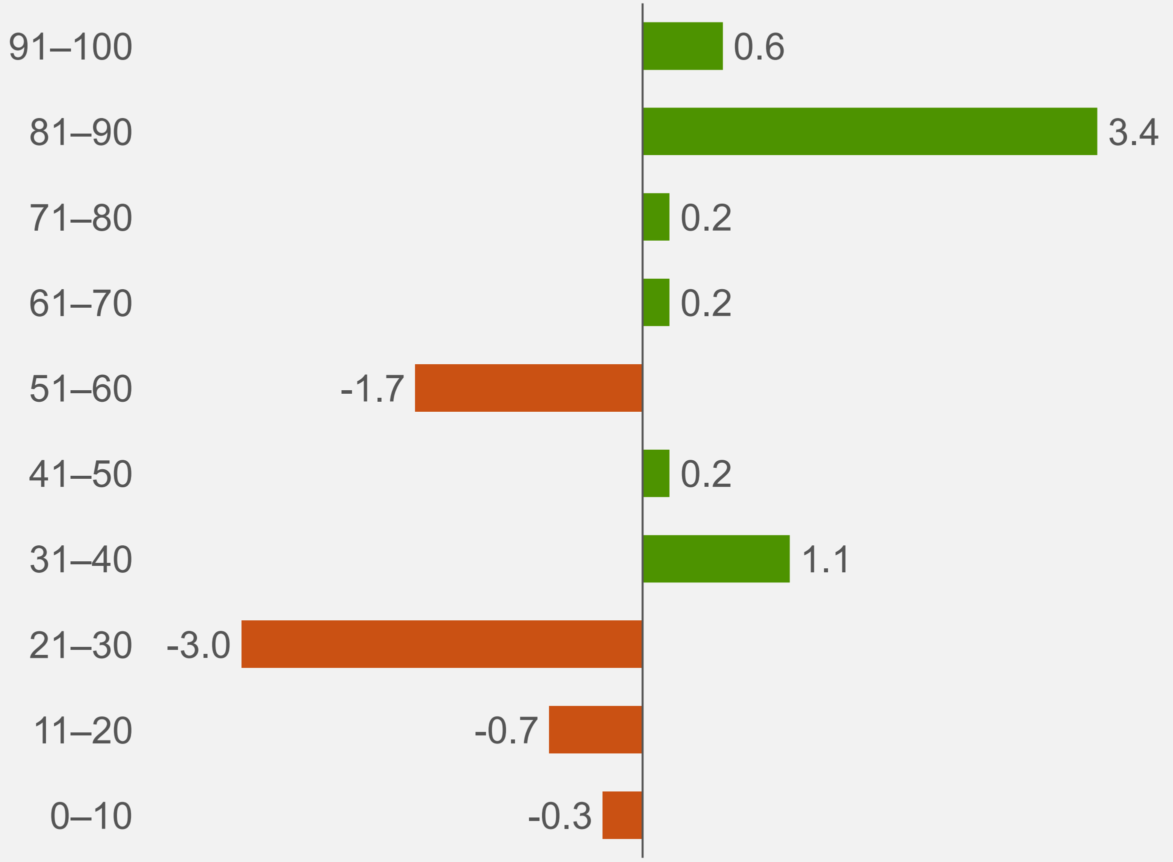
to be using scanning apps when making snack purchase decisions

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

They are prioritizing higher scores

Lowest Scan App Store On Snacks, Point Difference

Among HHs With Gen Alpha Children Present Vs. Total All Respondents

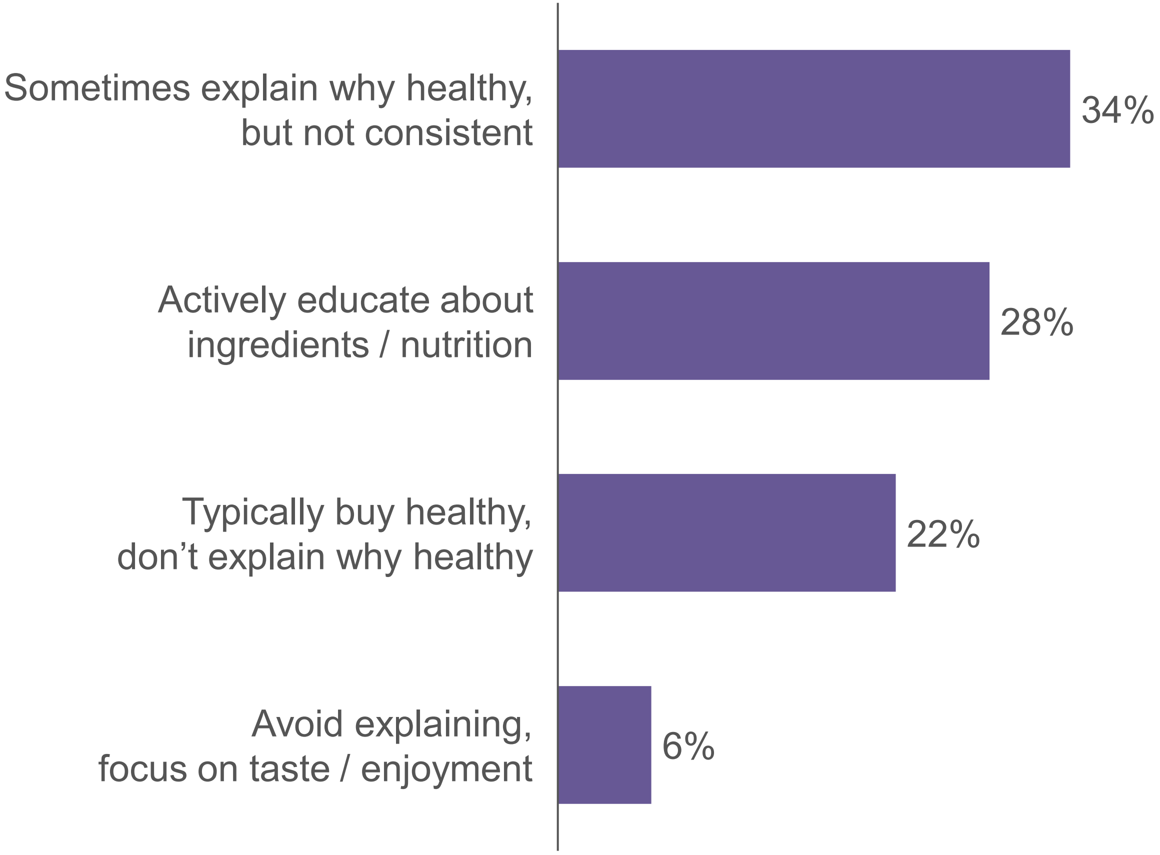


Source: NIQ, BASES Snacking Survey, n=2,009, 2026

Gen Alpha might be the most educated yet

Education Of Child About Healthy Snacking

Among HHs With Gen Alpha Children Present

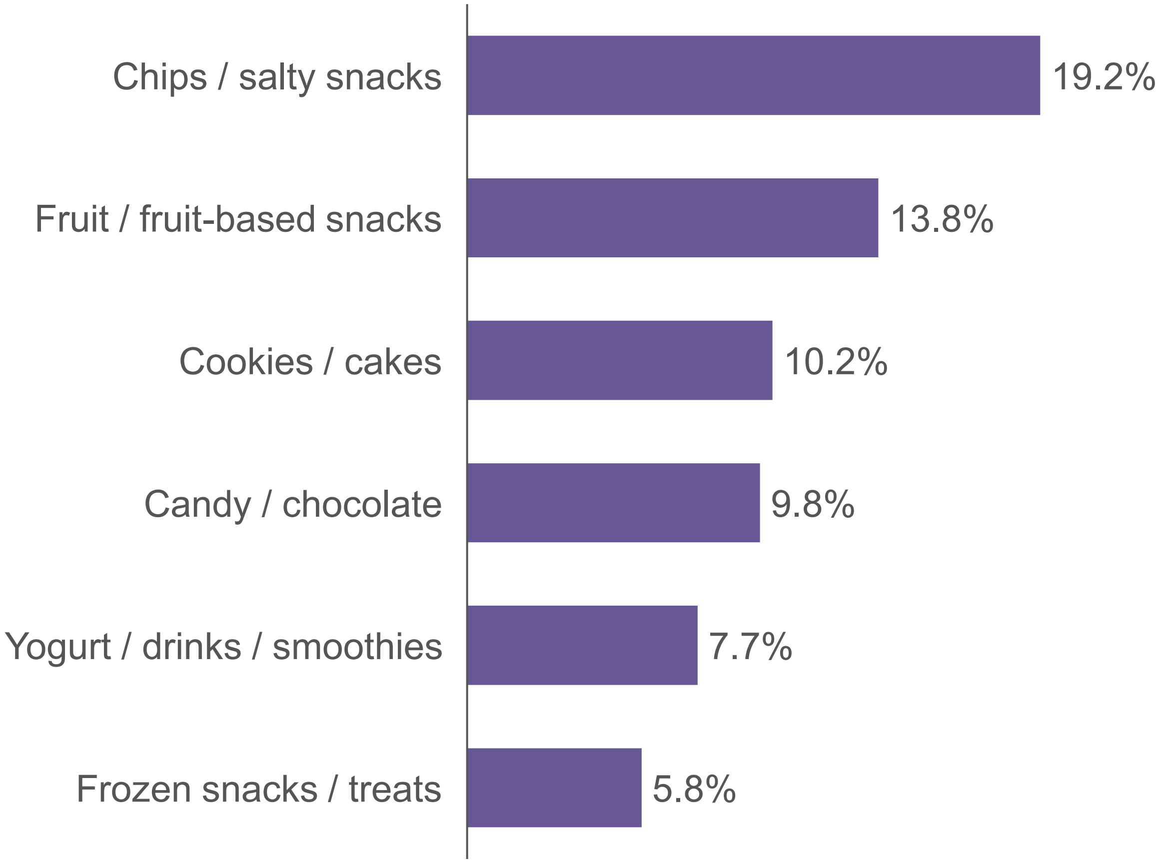


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Salty snacks are Gen Alpha’s most requested

Gen Alpha’s Most-Requested Snacks

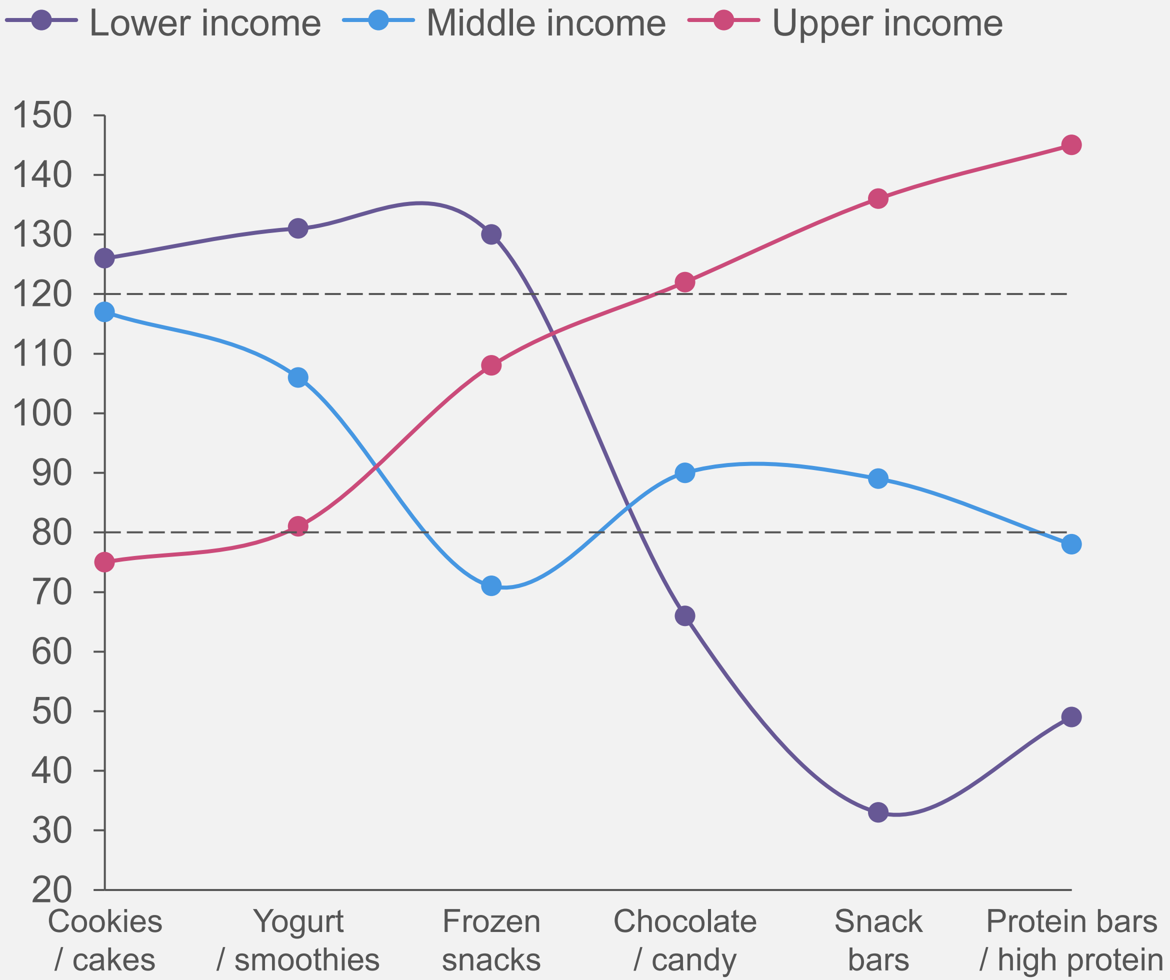
Among HHs With Gen Alpha Children Present



HH income plays a role in Gen Alpha’s asks

Gen Alpha’s Most-Requested Snacks, By HH Income

Among HHs With Gen Alpha Children Present

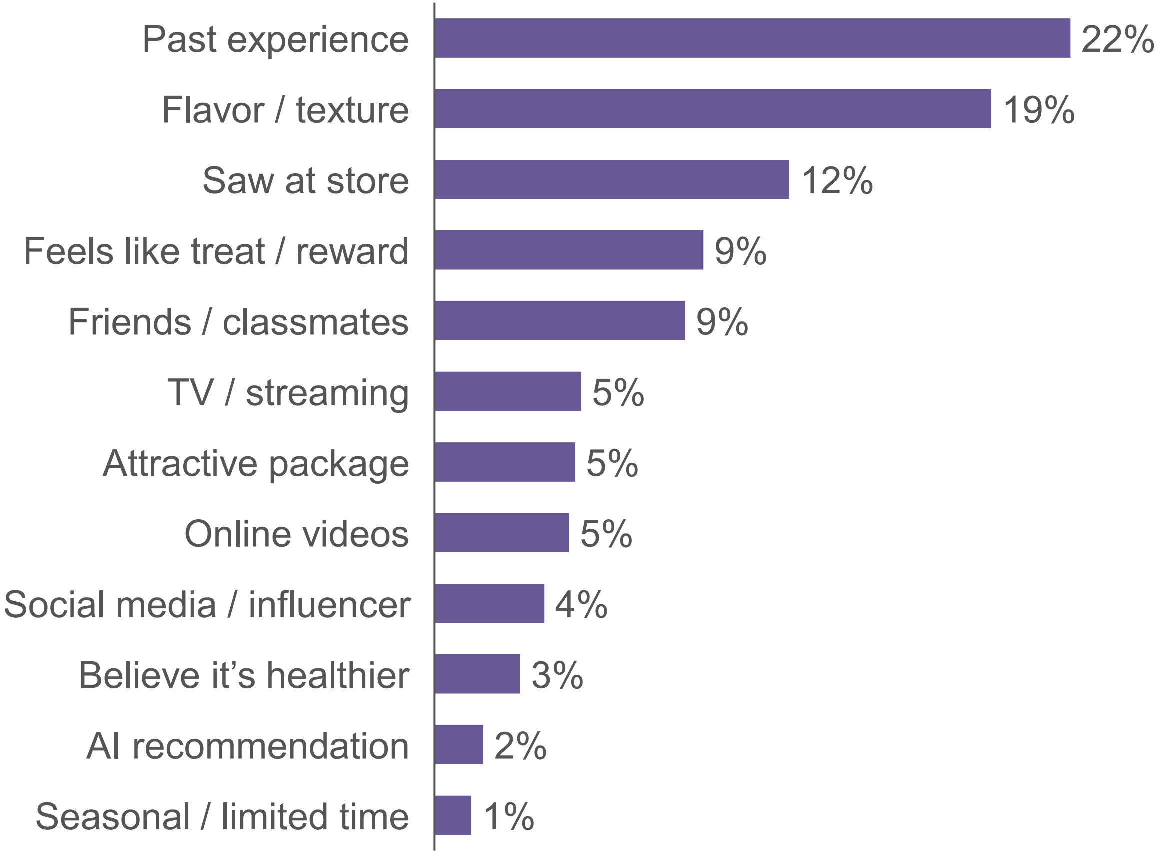


Source: NIQ, BASES Snacking Survey, n=2,009, 2026

Familiarity will fuel the future

What Motivates Specific Gen Alpha Snack Request

Among HHs With Gen Alpha Children Present

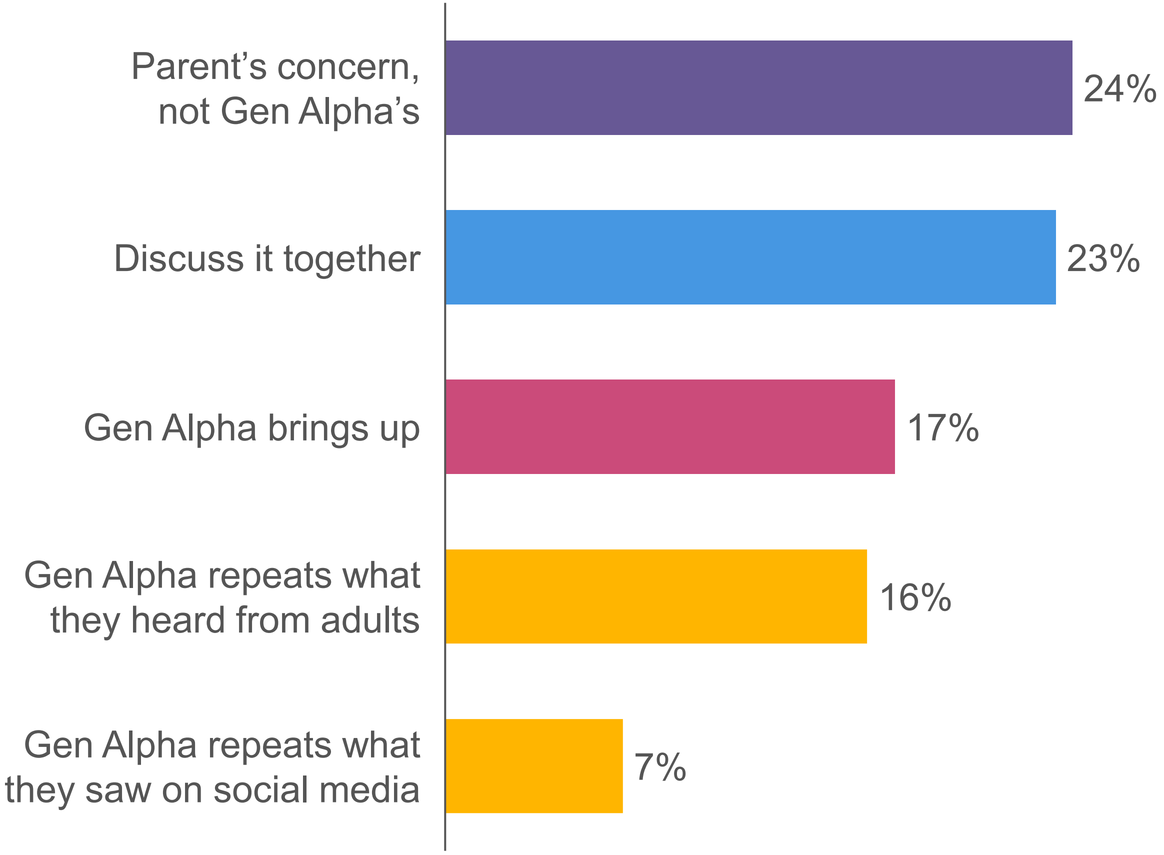


Source: NIQ, BASES Snacking Survey, n=2,024, 2026

Gen Alpha isn't waiting around

Who Brings Up Health Benefits When Buying Snacks

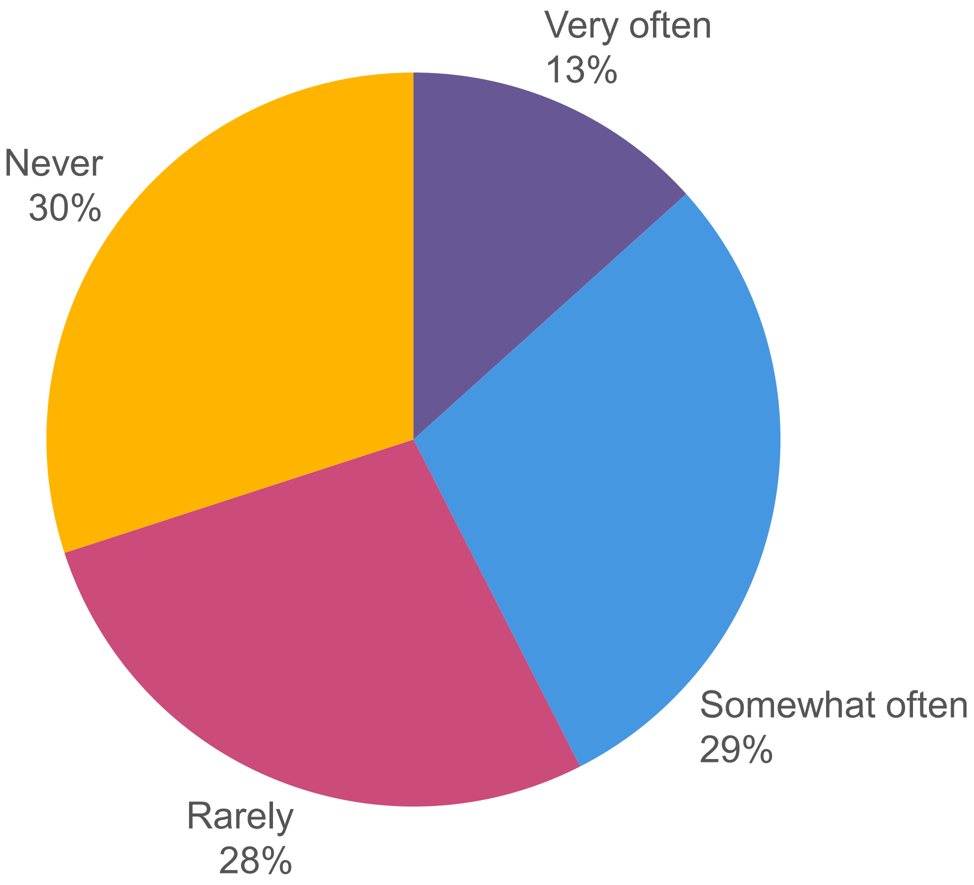
Among HHs With Gen Alpha Children Present



Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026

Gen Alpha is thinking about ingredients

How Often Gen Alpha Mentions Health And Ingredients To Parents When Making Snack Decisions
Among HHs With Gen Alpha Children Present

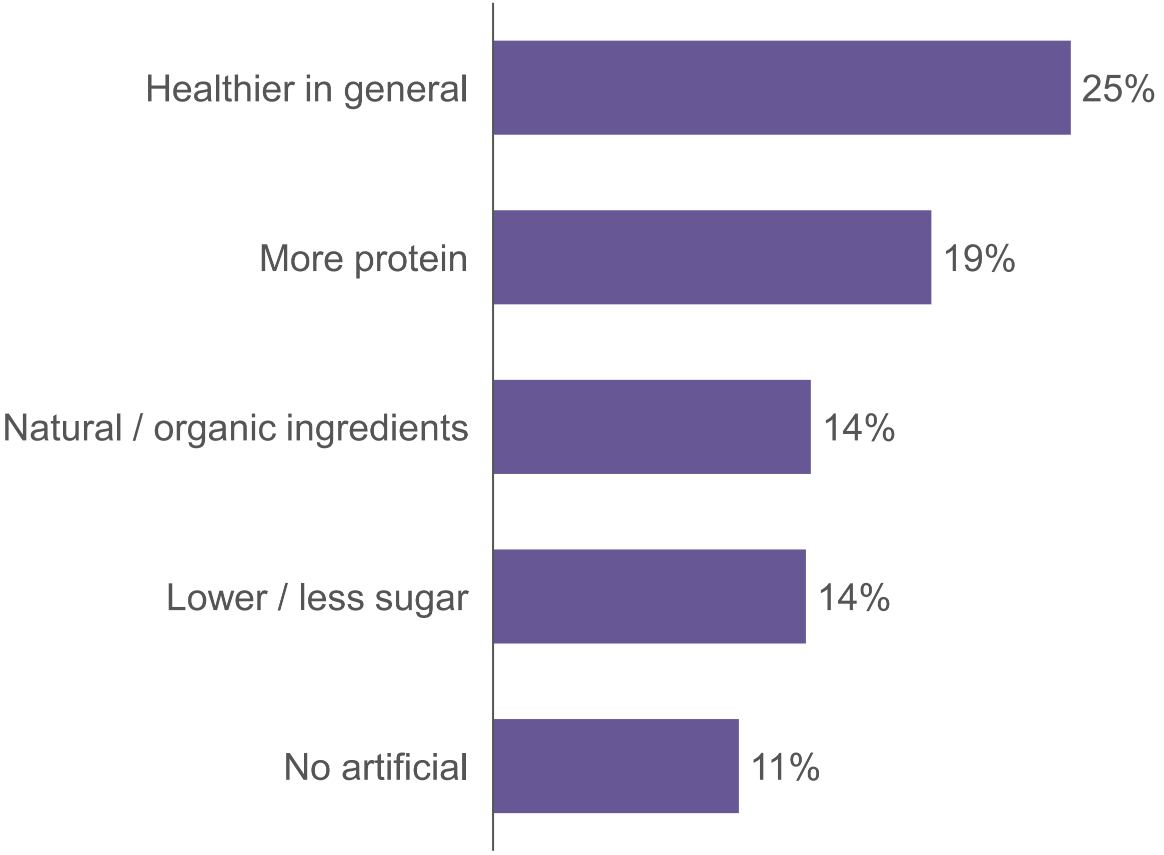


Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026

They are asking for protein

Specific Gen Alpha Health-Related Snacking Asks

Among HHs With Gen Alpha Children Present

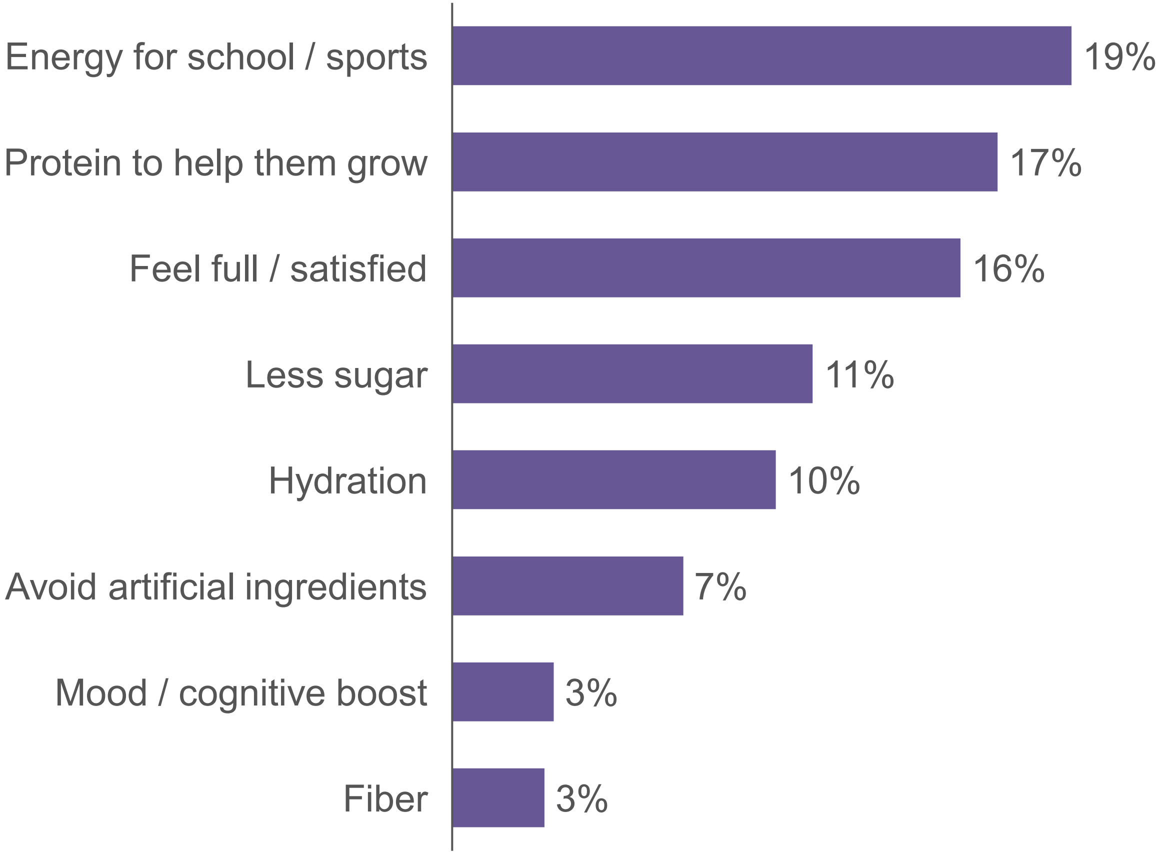


Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026

Gen Alpha is going to set a higher standard

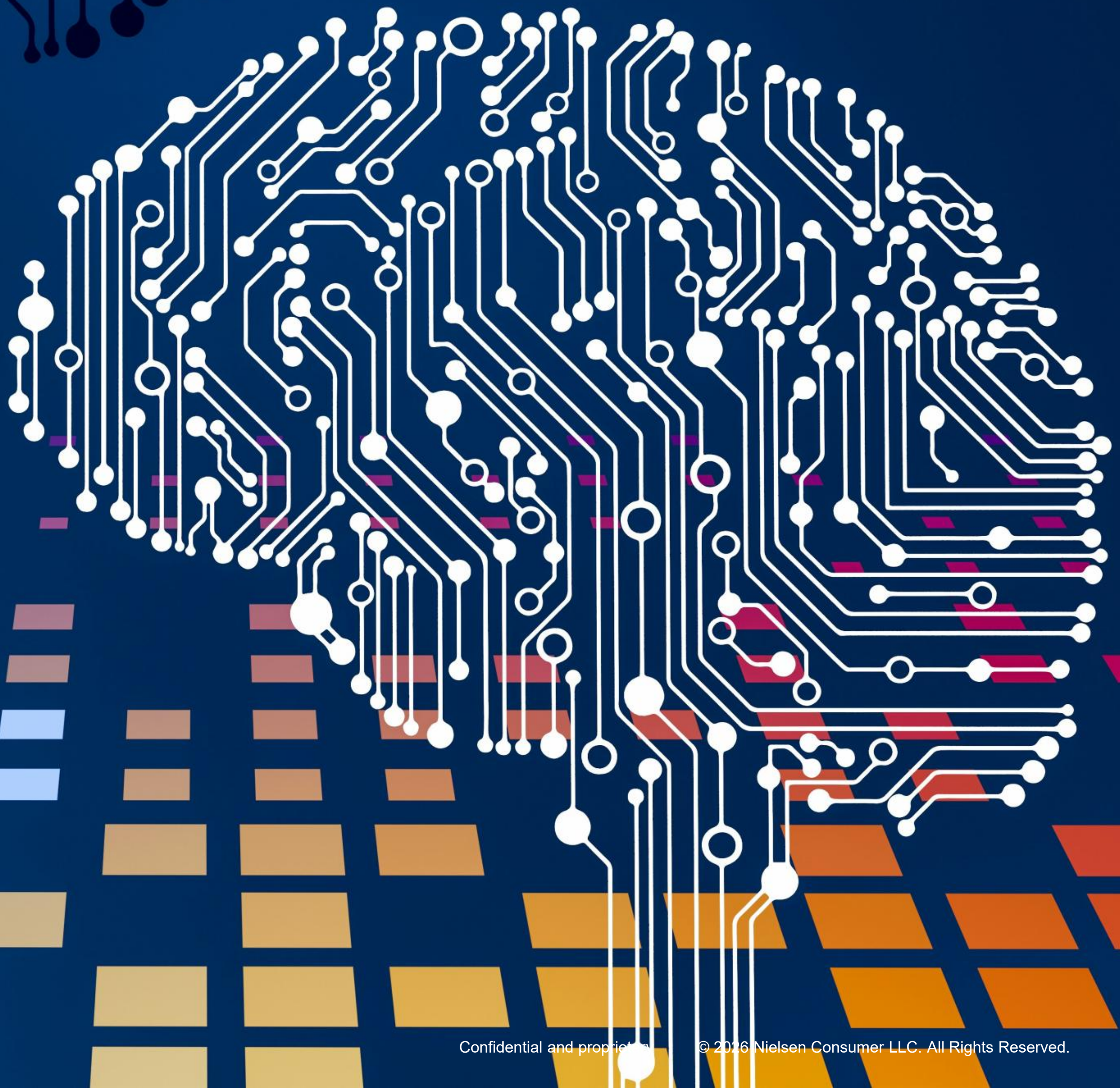
Leading Aspect Of Health / Ingredients For Gen Alpha

Among HHs With Gen Alpha Children Present



Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026
Note: *Among HHs with Gen Alpha present, where Gen Alpha is focused on specific health benefits from snacks

Remember Gen Alpha is growing up in an AI world



NIQ

The personal tech already exists


PROTEIN GOAL
82 g
of 120 g
68%
12g remaining
to reach your goal
PROTEIN INTAKE
Today
82 g
12 AM
12 PM
12 AM
TOP PROTEIN SOURCES
Chicken 32 g
Greek Yogurt 18 g
Protein Shake 16 g
Eggs 8 g
Other 8 g
SHOPPING LIST
Reach your protein goal with these picks.
Greek Yogurt
High in protein & probiotics
Qty: 1
GREEK YOGURT
Chicken Breast
Lean & versatile
Qty: 1
Eggs
Complete protein
Qty: 1 dozen
Protein Powder
Quick & convenient
Qty: 1
Cottage Cheese
High protein & low fat
Qty: 1
10:09
PROTEIN GOAL
82 g
of 120 g
68%
Daily Goal
Great progress!
You're on track to hit your goal.
ACTIVITY
7,532
steps
Goal: 10,000
RECOVERY
85
Excellent
Your body is well recovered and ready.
SLEEP
7h 45m
Sleep duration
Sleep quality
Good
HEART RATE
72 bpm
Resting
PRODUCT RECOMMENDATIONS
Whey Protein Powder
★★★★★ 4.6 (2,431)
24g protein / serving
$34.99
Add
WHEY PROTEIN
Plain Greek Yogurt (2%)
★★★★★ 4.7 (3,982)
17g protein / serving
$4.49
Add
Chicken Breast (Fresh)
★★★★★ 4.5 (1,876)
26g protein / 100g
$6.49 / lb
Add
AI RECOMMENDATION
Consider a 20g protein snack this afternoon to hit your goal and support muscle recovery.
TREND (7 DAYS)
You're consistent!
Protein intake
up 14%
vs last 7 days
EST. PROTEIN BOOST
+56–70 g
Add these items to easily meet and exceed your goal.
TOTAL EST.
$45.46
Based on recommended qty.
PRO TIP
Spread your protein intake across 3–4 meals per day for better absorption and muscle protein synthesis.
Learn more →

Five things to think about…

The age of blind consumption is ending	Premiumization has become a justification game	Algorithms are replacing brand equity	Protein is a proxy for something bigger	Gen Alpha isn't waiting to learn about health later
				

Big assortments matter far less than those tied to consumer values

Retailers…

Curate for scrutiny
Use product characteristics and shopper behaviors to build shelf assortments that can withstand scrutiny and remove friction from healthier decision making.

Organize premium around proof
Make space in the planogram by removing long-tail, low-incrementality SKUs; replace them with differentiated, hard-working SKUs that justify higher prices.

React faster than the trend cycle
Monitor what shoppers are discovering on social media and through social commerce to identify demand and translate that into assortment, merchandising, and activation before trends peak.

Merchandise by outcomes
Understand how your shoppers' decision hierarchy at the shelf has changed as need states have evolved in the pursuit of value, wellness, and snacking.

Build for tomorrow's standards
Audit your assortment against categories, benefits, and benefit stacks that parents of young children are looking for; fill the gaps because those items will be the baseline for the future.

Manufacturers…

Formulate for verification
Assess performance of characteristics that shoppers are selecting for and against, then design your portfolio to pass the test.

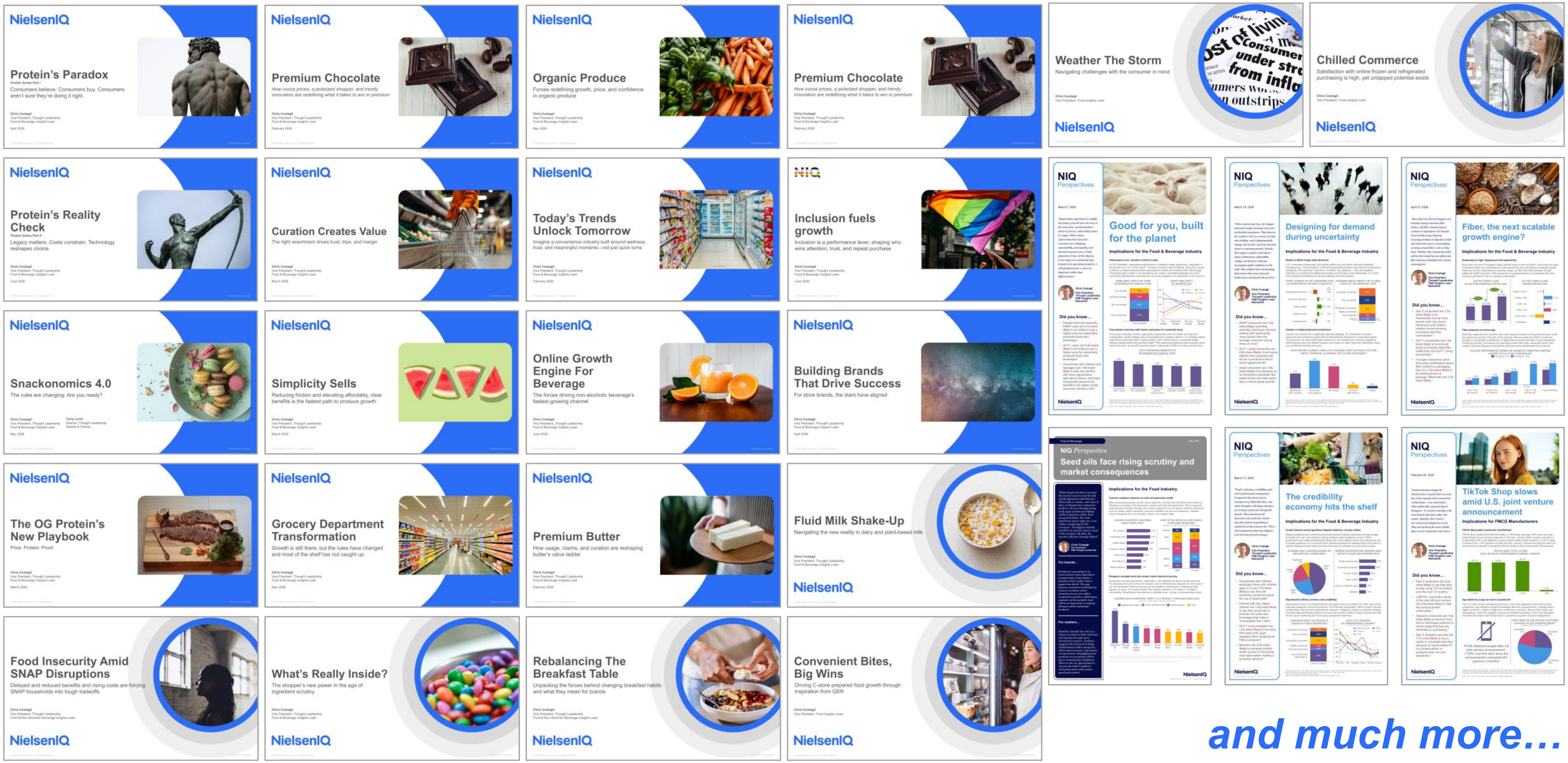
Justify every premium
Use consumer and purchase behavior to identify which characteristics earn willingness to pay, the focus innovation there to recruit buyers and create trade-up opportunities rather than relying on price increases alone.

Design for algorithmic discovery
Refresh packaging and messaging to ensure clarity for consumers and accurate, fair share of voice in online searches, AI recommendations, and scan apps.

Stack benefits intentionally
Build differentiated benefit stacks to drive stronger incrementality for your retail partners that also match consumer goals and deliver against the outcomes they are searching for.

Innovate for future demand
Watch for emerging trends while listening to what shoppers want as indicators of where demand is heading; innovate and be there before they become mainstream.

Let's continue the conversation, use the QR code on the next slide



and much more…

Thank you

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