The Future of Snacking 2025

CONAGRA BRANDS

The Future of Snacking

2025

Conagra Brands, a leading maker of snacks including brands such as Slim Jim® meat snacks, Orville Redenbacher's® popcorn, DAVID® seeds, FATTY® smoked meat sticks, Angie's BOOMCHICKAPOP ® popcorn, Snack Pack® desserts and more, proudly shares the first edition of the Future of Snacking report, leveraging Conagra's cutting edge demand science and insights expertise. In addition, we partnered with Circana, LLC to provide robust sales data and in-home consumption behaviors from its National Eating Trends® report. This report offers a data-driven look at the $148.6 billion U.S. snacking industry, as defined by Circana LLC.[1] To enrich the U.S. perspective, relevant global snacking trends have been layered in where appropriate.

The report focuses on leading trends and newer, emerging forces shaping snacking behavior, highlighting how consumers are navigating an increasingly diverse snack landscape.

To adjust for price or product size variation during the past four years, this report examines volume metrics to track purchase growth.

1. Circana, LLC, Total US - MULO+ with Conv, Total Snacking Universe, Dollar Sales, 52 WE Mar 23, 2025

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Overview Of Snacks

Snacking is no longer a side habit—it's the main event. The U.S. snacking market has reached an impressive **$148.6 billion** in annual sales, reflecting its massive footprint in the food landscape.[1] In fact, snacking has officially surpassed all individual meals in frequency, with per-person occasions up 2% since pre-COVID, adding 13 extra snack moments per year.[2] **By 2027, snack foods are projected to account for nearly nine billion more food occasions.**[3]

Globally, snacking is just as dominant: the market surpassed $539 billion by the end of 2024,[4] fueled by evolving consumer behaviors, increased cross-cultural flavor exploration, and a growing preference for snacks that offer both enjoyment and function. The U.S. leads this market, followed by China, the U.K., Japan, and Germany.[4]

When looking at the U.S. market, this steady momentum is fueled by two primary growth drivers.

First, **protein-forward snacks** are experiencing rapid growth, driven by increasing consumer interest in satiety, energy, and wellness. This segment includes protein bars, meat sticks, jerky, trail mixes and seeds. These snacking options align with the growing demand for better-for-you snacking options that also provide functional benefits.

Second, **lunchbox staples**—affordable, convenient snacks with broad appeal—continue to thrive. Items like peanut butter or cheese sandwich crackers, potato chips, pretzels, and snack bars have become mainstays in lunchboxes, backpacks, and beyond, thanks to their reliability and ease of use in daily routines.

Together, these two pillars—**protein-forward snacks** and **lunchbox staples—have delivered the largest absolute volume gains across the department**, cementing their roles as foundational drivers of growth in the broader snacking landscape.[5]

1. Circana, LLC, Total US - MULO+ with Conv, Total Snacking Universe, Dollar Sales, 52 WE Mar 23, 2025
2. Circana, National Eating Trends® and CREST®, 12ME March 2025
3. Circana, LLC, SnackTrack®, YE Dec 2027 vs. 2024
4. GlobalData selected country coverage, 2024
5. Circana, LLC, Total US - MULO+ with Conv, Lunchbox Staples & Protein-Forward Snacks, Volume Sales Absolute Change v. YA, 52 WE Mar 23, 2025

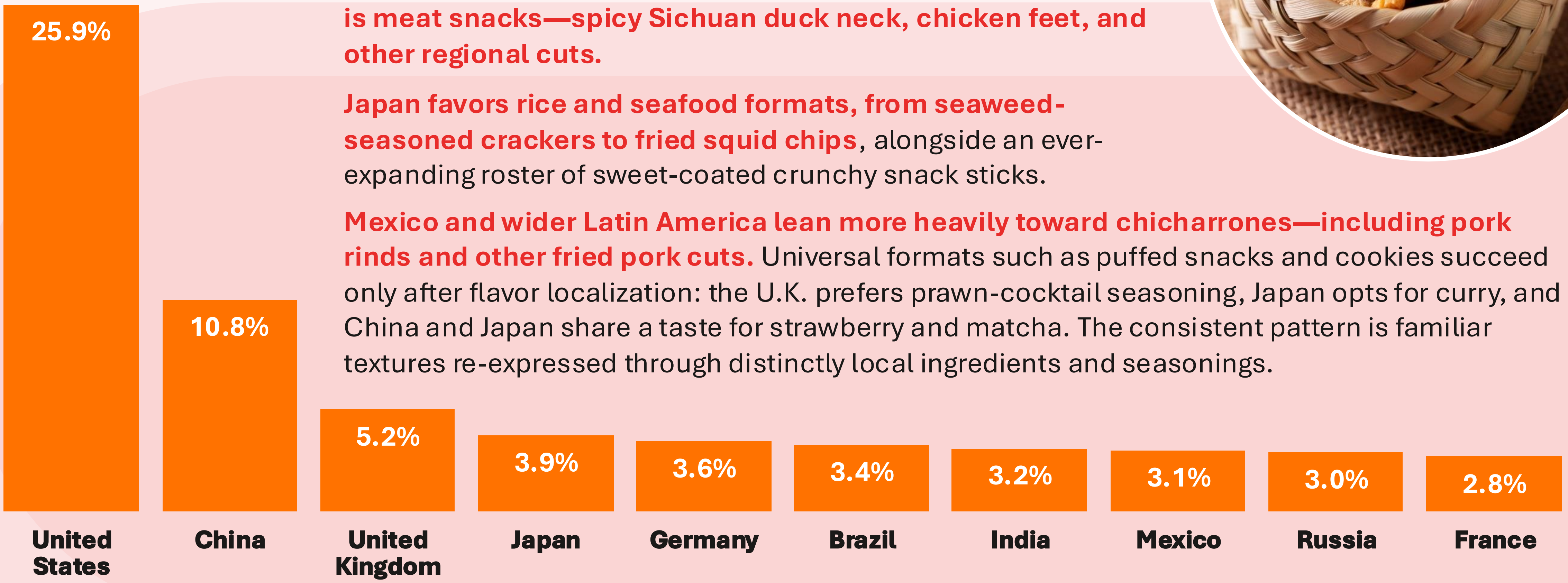
Dollar Share of Global Snacking Market

Across the top 10 snacking markets, category leaders shift with local palates.

Chocolate dominates most countries, yet **China's best-seller is meat snacks—spicy Sichuan duck neck, chicken feet, and other regional cuts.**

Japan favors rice and seafood formats, from seaweed-seasoned crackers to fried squid chips, alongside an ever-expanding roster of sweet-coated crunchy snack sticks.

Mexico and wider Latin America lean more heavily toward chicharrones—including pork rinds and other fried pork cuts. Universal formats such as puffed snacks and cookies succeed only after flavor localization: the U.K. prefers prawn-cocktail seasoning, Japan opts for curry, and China and Japan share a taste for strawberry and matcha. The consistent pattern is familiar textures re-expressed through distinctly local ingredients and seasonings.



Source: GlobalData selected country coverage, 2024

Snacks by Generation (U.S.): A Shift in Taste and Expectation

Younger generations, especially **Gen Z** (ages 11-27) and **Millennials** (ages 28-43), play a growing role in shaping snack trends. As Gen Z joins the workforce and Millennials drive household buying decisions, their preferences are **increasingly influencing the future of snacking.**

Gen Alpha
(Under 11)

Small but Mighty Influence

By 2027, Gen Alpha will drive 27% of eating occasions[1]

Gen Z
(11–27)

Bold Flavor & Real Ingredients

Gen Z favor bold, flavor-forward snacks, plus permissible options with recognizable ingredients[2]

Millennials
(28-43)

Practical & Functional

Similar to Gen Z, Millennials favor protein and better-for-you salty snacks[3]

Gen X
(44–59)

Familiar & Family-Friendly

Gen X want satisfying and familiar snacks, balancing personal tastes with household needs[4]

Boomers
(60–78)

Classic & Comfort

Boomers lean towards comfort and familiar flavors, usually sweet focused[5]

1. Source: Circana, LLC, SnackTrack®, US, Top Snack Foods Forecasted to Grow Above Population, Gen Alpha (Born 2013 or After), Projected Volume Growth, YE Dec 2027 v. 2024
2. Source: Circana, LLC, Total US - All Outlets, Snack Products by Audience, Gen Z (Born 1997 - 2012), Dollar Index to Total Snacks, 52 WE May 18, 2025
3. Source: Circana, LLC, Total US - All Outlets, Snack Products by Audience, Millennials (Born 1981 - 1996), Dollar Index to Total Snacks, 52 WE May 18, 2025
4. Source: Circana, LLC, Total US - All Outlets, Snack Products by Audience, Gen X (Born 1965 - 1980), Dollar Index to Total Snacks, 52 WE May 18, 2025
5. Source: Circana, LLC, Total US - All Outlets, Snack Products by Audience, Boomers (Born 1946 - 1964), Dollar Index to Total Snacks, 52 WE May 18, 2025

U.S. Snacking Fun Facts

Consumption of meat snacks and ready-to-eat popcorn is projected to outpace U.S. population growth through 2027, signaling rising everyday demand for these convenient options.[1]

Popcorn ranks as the #3 most-searched snack on Google—trailing only chips and crackers—and reflecting strong consumer interest and sustained demand.[4]

Americans average three snacks a day, with snacking peaking midday, followed by morning and then evening occasions.[2]

On average, households keep 11 different types of snack foods stocked at any given time.[5]

The top five packaged lunchbox snacks are:
1) Mini meal kits **2)** Potato chips **3)** Cookies
4) String cheese **5)** Fruit or applesauce cups.[3]

Snacks branded as "Bites" or "Minis" have reached $2.9 billion in sales, reflecting a growing demand for poppable, shareable formats.[6]

1. Circana, LLC, SnackTrack®, US, Snack Food Eatings, Projected % Change, YE Dec 2027 v. 2024\
2. Circana, LLC, SnackTrack®, US, Snack Foods, Average Occasions and Foods Per Day, YE March 2025
3. Circana, LLC, SnackTrack®, US, Snack Foods at School, % of Eatings, YE March 2025
4. SimilarWeb Google Search Data, Last 12 Months Through May 2025
5. Circana, LLC, Kitchen Audit 2025
6. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Bites & Mini Snacks, Dollar Sales, 52 WE Apr 20, 2025

The Future of Snacking

2025 Trends

1 Flavor Explosion

2 Snacking Without Borders

3 Better-for-You Snacking

4 Better Together: Co-Branded Bites

5 Snacks on the Go

TREND 1

Flavor Explosion

Top Savory Flavors

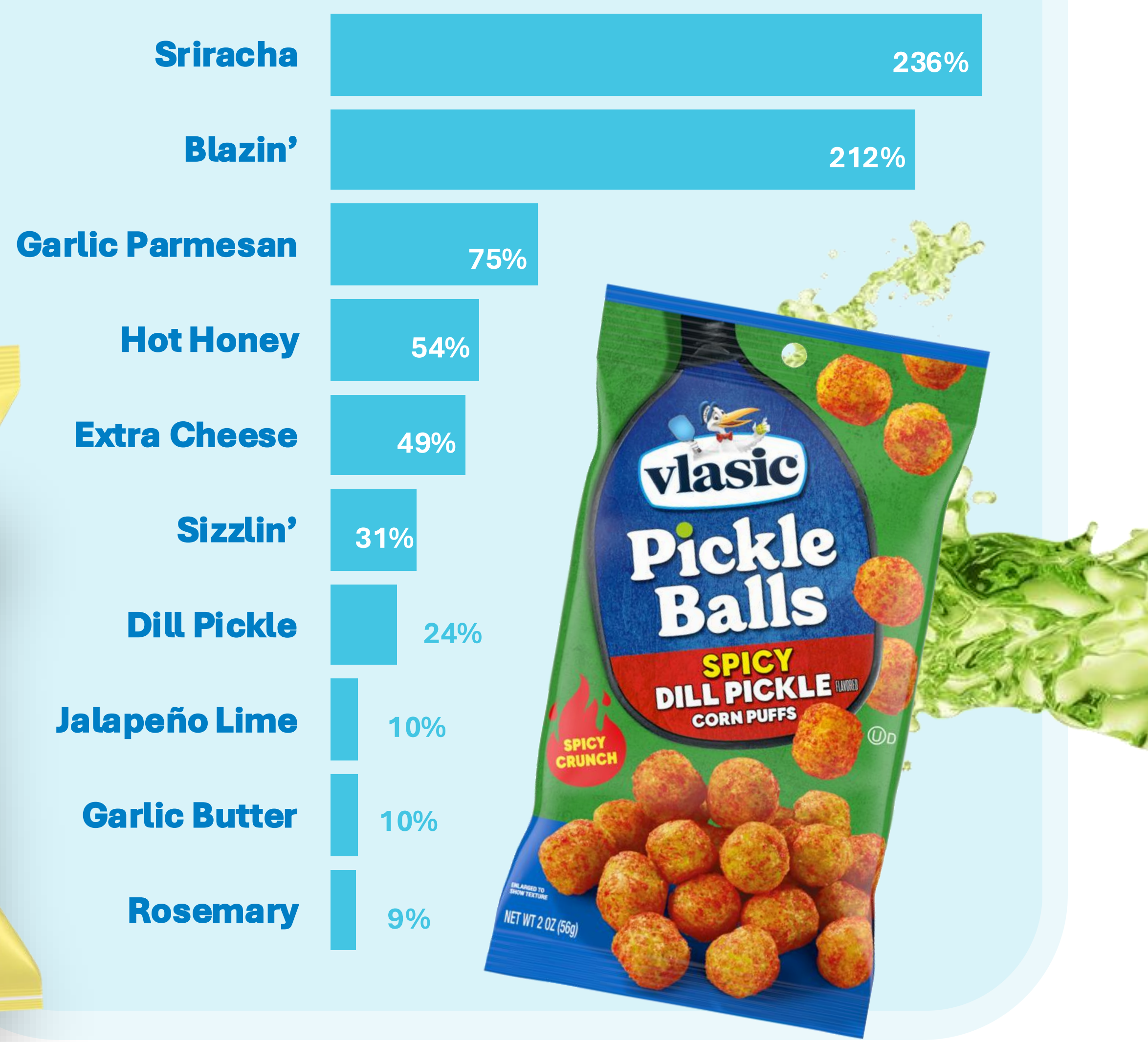
The U.S. savory snack aisle is defined by two key flavor trends: consumer favorites and new flavor innovation. **Trusted favorites like sea salt, extreme heat, BBQ, and nacho cheese continue to dominate in sales**, each generating over $2 billion annually and offering broad, familiar appeal.[1]

At the same time, **bold and emerging flavors such as sriracha, blazin', garlic parmesan, and hot honey are driving rapid growth**, reflecting a growing consumer appetite for intensity, complexity, and novelty.[1] Together, these trends highlight a consumer desire for both comfort and adventure, whether through classic formats with a flavorful twist or entirely new, bold snacking experiences.

1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Savory Flavor Profiles, Dollar Sales and Volume Sales % Change v. YA, 52 WE Apr 20, 2025

Top Flavors by Size[1] (in Billions)

Top Flavors by Growth[1]



1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Savory Flavor Profiles, Dollar Sales and Volume Sales % Change v. YA, 52 WE Apr 20, 2025

Who's Driving the Flavor?

Flavor preferences in savory snacks vary by age, life stage, and culture. **Sea salt appeals more to older consumers**, valued for its simplicity and perceived better-for-you cues. **Spicy flavors** like hot chili, jalapeño, and general "spicy" profiles are **especially popular with younger, multicultural consumers**—particularly Gen Z and Millennials—who seek bold, exciting tastes.

White cheddar and ranch also skew younger, linked to kid-friendly formats and everyday snacking. **BBQ shows strong resonance among Black households**. Meanwhile, nacho cheese and sour cream & onion have broad, cross-generational appeal, especially among Gen X and Millennials, blending nostalgia with mainstream popularity.[1]

1. Circana, LLC, Total US – All Outlets, Flavor Profile Demographics, All Households, NBD Dollars, 52 WE May 18, 2025

Ultra Spicy Is On Fire

In Mexico, ultra-spicy snacks are a cultural staple, not a passing trend—proving to be a top driver of category growth.[1] Flavors like ACT II® Inferno Extremo tap into a snacking culture rooted in bold intensity and sensory adventure, while the messiness simply comes with the territory.

*In contrast to the U.S., where spice tends to resonate most with younger consumers, **in Mexico a preference for spicy snacks spans across age groups**—ranking just behind salty snacks—highlighting the broad cultural influence of heat and spice.*[2]

1. Nielsen IQ Snacking Industry: Global Industry Forum Q3 2024 (October 2024)
2. GlobalData, 2024 Q1 Consumer Survey Results-Mexico

The Pickle Craze

Tart, Tangy, and Trending

Pickles are no longer just a side dish—they're a full-blown snacking and flavor phenomenon. From snack aisles to fast food menus and viral social content, dill-forward innovation is having a major moment.

- **Searches for pickle-flavored snacks**, including pickle popcorn seasonings are **up 23% year-over-year.**[1]
- **Quick-serve restaurants are embracing the trend too**, with pickle-centric menus that feature not just fried pickles, but also **pickle lemonade, slushies, fries, and more.**
- **Pickle fandom is thriving on social media—over 2.5 million Instagram posts use #pickles** showcasing everything from recipes and snacks to bold flavor mashups.[2]

Whether spicy, sour, or sweet, **pickle is proving its flavor staying power across formats and generations.**

1. SimilarWeb Google Search Data, Last 12 Months Through May 2025
2. Instagram, July 2025

Where Flavor Meets Format

Reinventing the Snack Experience

The flavor landscape in snacks is evolving not just through bold tastes but also through **new formats and experiences.**

Traditional snack forms are being reinvented with **modern textures and novel shapes, like crisps, puffs, balls, bites, and spirals.** These formats create opportunities for both classic and emerging flavors to shine in **visually engaging and sensory-rich ways.**

As this flavor explosion innovation continues, core snack categories—such as cheese snacks, pretzels, tortilla chips, snack nuts, and meat sticks—are leading growth, **driven by bold, spicy, tangy, and indulgent flavor profiles.**[1]

Popcorn seasonings have rapidly gained traction, addressing an unmet demand for customizable flavors—now reaching

$67 Million

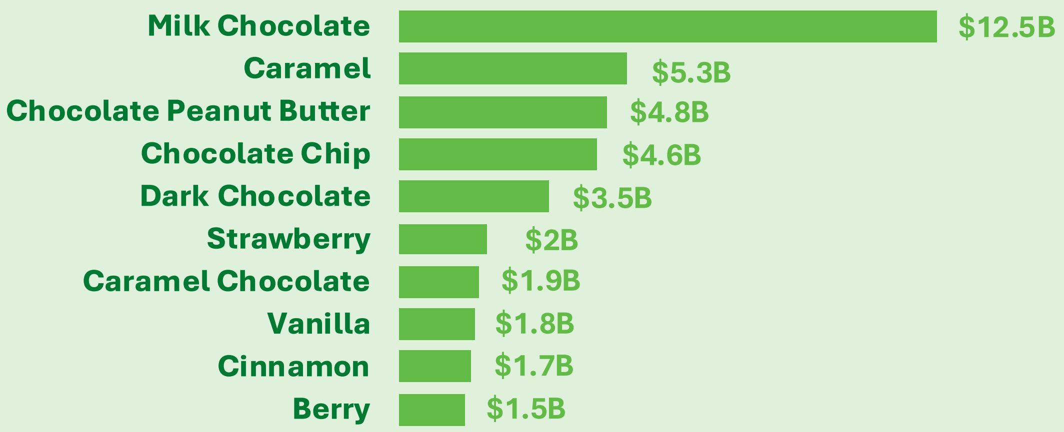
in annual sales and growing at a double-digit pace.[2]

1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top Sub-Categories Among Top Savory Flavors, Volume Sales % Change v. YA, 52 WE Apr 20, 2025
2. Circana, LLC, Total US - MULO+ with Conv, Dollar Sales and Volume Sales % Change v. YA, 52 WE Apr 20, 2025

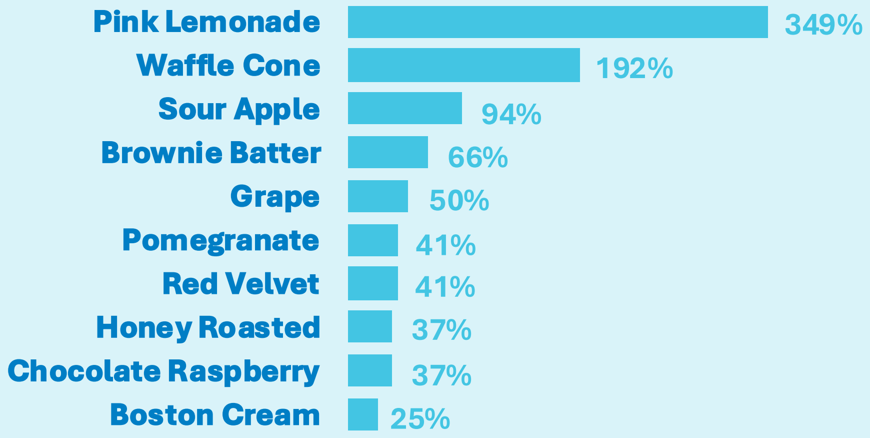
Sweet Flavors Keep Getting Sweeter

As consumer tastes evolve, indulgent flavors remain a powerful driver of interest and innovation. While classic flavors like **milk chocolate, caramel, and peanut butter** still lead in dollar size, lesser-known flavors are quickly gaining ground. **Pink lemonade, waffle cone, and sour apple** top the list of fastest-growing sweet profiles, signaling growing interest in **playful, nostalgic, and bold** taste experiences.[1]

Top Sweet Flavors by Size[1]



Fastest-Growing (Mainstream) Flavors[1]



1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Sweet Flavor Profiles, Dollar Sales and Volume Sales % Change v. YA, 52 WE Apr 20, 2025 (Fastest growing flavors have been filtered to $20M+)

Desserts as Flavor
When Form Becomes the Trend

Sweet snacking is increasingly inspired by classic dessert forms, all experiencing strong growth thanks to viral recipes and creative mashups.[1] Top growing flavors include:

- **Cinnamon bun (+117%)**
- **Tiramisu (+108%)**
- **Strawberry Cheesecake (+58%)**
- **Churro (+47%)**

Much of this momentum appears linked to **younger consumers**, who are often behind the viral recipes and social food trends fueling this wave—craving comfort, creativity, and visual shareability in dessert-style snacks. Looking ahead, emerging **new options like the globally-inspired Dubai chocolate bar hint at the next wave of dessert innovation**—where snack and plated dessert blur, and storytelling, origin, and format take center stage.

1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top Dessert Forms as Flavors in Snacks, Volume Sales % Change v. 3YA, 52 WE Apr 20, 2025

TREND 2

Snacking Without Borders

Global Flavors and Forms Provide Runway for Innovation

Globally inspired snacks represent a **growing and sizeable share of the U.S. snacking space** generating **$5.7 billion** in retail sales and seeing 22% volume growth over the past three years.[1] These snacks are fueling strong performance in core categories like **salty snacks, candy, and meat snacks.**[2]

Angie's BOOMCHICKAPOP popcorn taps into globally inspired Mango Habanero flavor profile, which has grown

+129%

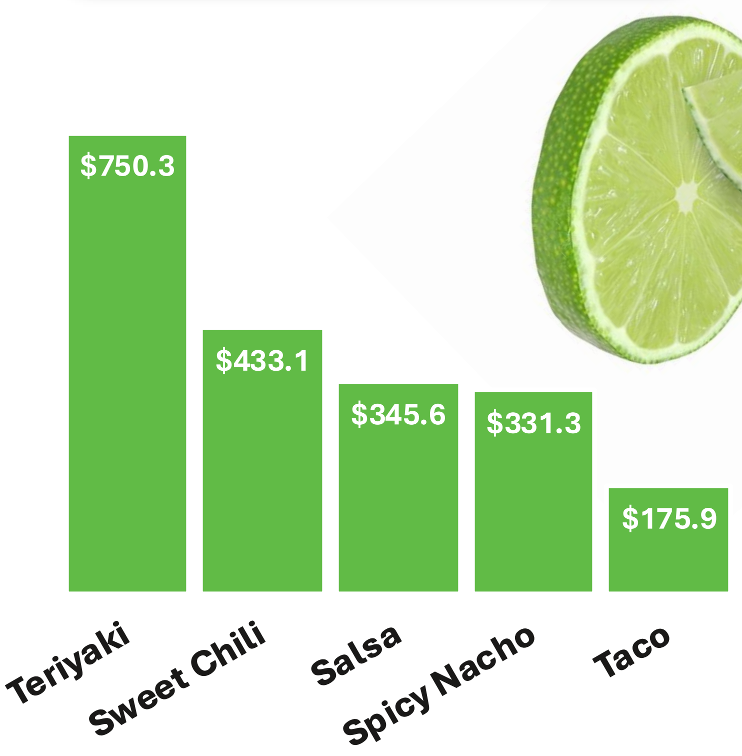
on menus over the past four years.[5]

Demand is driven by younger generations, with **Gen Z and Millennials** 34% more likely to purchase globally inspired snacks vs. total snacks,[3] and **households with teens** are 36% more likely,[4] highlighting influence across both individual and family consumption.

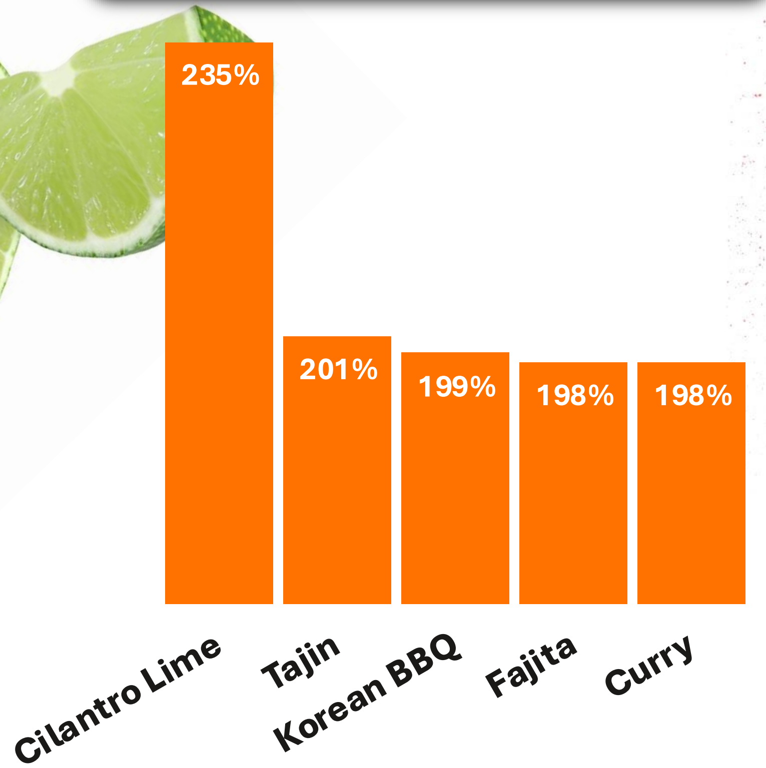
1. Circana, LLC, Total US – MULO+ with Conv, Total Global Snacking, Dollar Sales and Sum of Vol v. 3YA, 52 WE May 25, 2025
2. Circana, LLC, Total US – MULO+ with Conv, Total Global Snacking by Category, Sum of Vol v. 3YA, 52 WE May 25, 2025
3. Circana, LLC, Total US – All Outlets, Global Snacks by Generation, Dollar Index, 52 WE May 18, 2025
4. Circana, LLC, Total US – All Outlets, Global Snacks by Household and Lifestage, Dollar Index, 52 WE May 18, 2025
5. Datassential Menu Penetration, through March 2025 vs. 4 Years Ago

Globally inspired snacks are reshaping the category by bringing both familiar and emerging international flavors into new and unexpected snack formats. **While well-known profiles like teriyaki remain among the most popular,[1] rising flavors such as gochujang point to growing interest in deeper global exploration,[3]** making snacking a more dynamic and culturally rich experience.

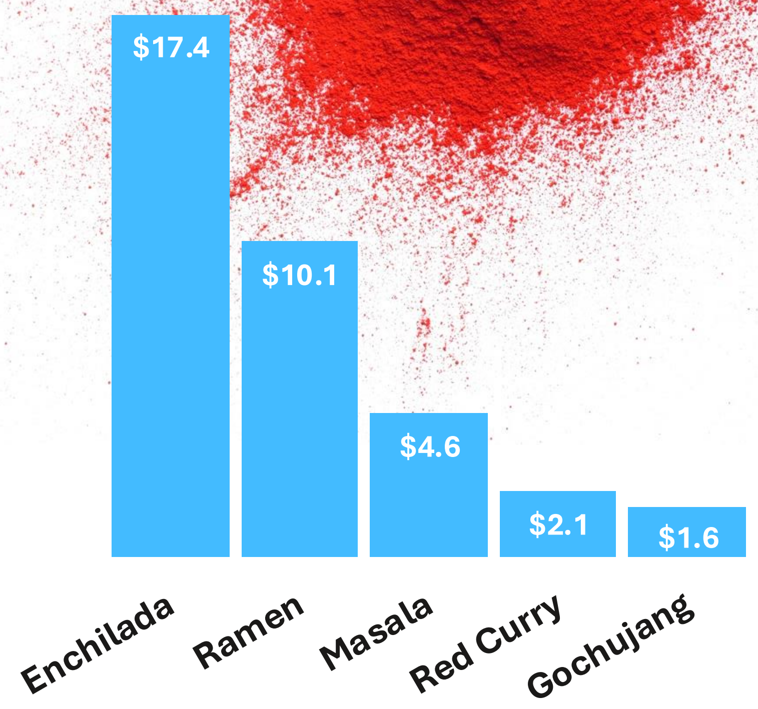
Top Flavors by Size[1]
(in Millions)



Top Flavors by Growth[2]



Top Emerging Flavors[3]
(in Millions)



1. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top 5 Global Flavors in Snacking, Dollar Sales, 52 WE Apr 20, 2025
2. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top 5 Global Flavors in Snacking, Volume Sales % Change v. 3YA, 52 WE Apr 20, 2025
3. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top 5 New Global Flavors in Snacking, Dollar Sales, 52 WE Apr 20, 2025

Global Ingredients Are Doing More Than Adding Flavor

They're Reshaping the Very Form of Snacking

From crunchy chickpeas, to crispy cassava chips, and roasted seaweed sheets, these globally rooted components introduce **distinctive textures, new formats, and culturally inspired eating experiences.** Beyond novelty, these snack forms are **driving notable category growth** and creating **clear points of differentiation on shelf.**

Sweet Heat Isn't Just Hot in the U.S.

Sweet-heat flavors like Sweet Chili are thriving beyond U.S. borders. **In Canada, Sweet Chili ranks as the #10 flavor in salty snacks.** Its rising popularity highlights a growing global appetite for bold, sweet-meets-spicy profiles and signals opportunity for flavor inspiration in the U.S. market.[1]

Top 5 Fastest Growing Global Snack Forms[2]

Chickpea
+214%

Seaweed
+74%

Plantain
+58%

Cassava Chips
+52%

Edamame
+17%

1. Nielsen Strat Planner Salty Snacks, National Excl NFLD Canada GDM, PE May 17, 2025
2. Circana, LLC, Total US - MULO+ with Conv, Multi-Attribute Flavor/Form Sizing, US, Top 5 Global Forms in Snacking, Dollar Sales and Volume Sales % Change v. 3YA, 52 WE Apr 20, 2025

TREND 3

Better-for-You Snacking

Snacks that Taste Great and Align with Personal Goals

Snacking is no longer only about indulgence or flavor; it's about finding options that **taste great *and* align with personal goals,** whether that means choosing better ingredients, functional benefits, or simply something that fits a specific lifestyle. **Categories that inherently deliver key health benefits are leading growth**, while more mainstream snacks are evolving through the infusion of functional claims. **Younger consumers specifically are driving demand for more nutrient-dense snacking.**[1] Meanwhile, the rise of GLP-1 medications is fueling interest in **portion-controlled, protein-packed snacks**. Across all trends, protein emerges as a unifying, high-impact attribute, anchoring innovation and reflecting a broader shift toward purposeful snacking.

Together, these forces signal a major opportunity for brands to lead with modern health attributes that reflect how **today's consumers snack with purpose.**

1. Circana, LLC, Total US – MULO+, Future of Snacking Universe, Health and Wellness Claims by Generation, Dollar Index to Total Snacking Spend, 52 WE June 15, 2025

Better-for-You Snack Segments Are Leading Growth

Better-for-You (BFY) snacking is accelerating, with subcategories that naturally deliver health benefits, such as meat snacks, nuts, seeds, and fruit-based snacks, outperforming the total landscape.[1] **Dried meat snacks, especially sticks, are the fastest-growing subcategory** versus three years ago,[2] with **grass-fed options seeing +81% year-over-year volume growth.**[3]

Grass-fed claims are gaining traction not just as a health signal, but as an ethical shortcut for "better-for-me and better-for-others." *Whether motivated by an association with clean protein sourcing, or ingredient integrity, these labels resonate with the modern BFY shopper.*

Gut health claims are also making a strong impact, further amplifying growth within this inherently BFY snacking space. **Snacks with probiotics had +186% volume growth year over year.**[4]

Gen Z and Millennials are actively driving this growth, taking full advantage of inherently BFY snacks and the added benefits they now often deliver. They are 58% more likely to purchase snacks with animal diet claims and 32% more likely to choose options with gut health benefits compared to total shoppers.[5]

1. Circana, LLC, Total US – MULO+, Total Future of Snacking Universe v. Better For You Subcategory, Volume Sales % Change v. 3YA, 52 WE May 25, 2025
2. Circana, LLC, Total US – MULO+, Dried Meat Snacks, Volume Sales % Change v. 3YA, 52 WE May 25, 2025
3. Circana, LLC, Total US – MULO+ with Conv, Dried Meat Snacks, Volume Growth v. YA, YE Apr 20, 2025 NIQ Product Explorer, Powered by Label Insights 100% Grass-Fed attribute
4. Circana, LLC, Total US – MULO+ with Conv, Total Bars & Other Snacks, Volume Growth v. YA, YE Apr 20, 2025 NIQ Product Explorer, Powered by Label Insight Contains Probiotics attribute
5. Circana, LLC, Total US – MULO+ with Conv, Total Future of Snacking Universe, Volume Growth v. YA, YE Apr 20, 2025 NIQ Product Explorer, Powered by Label Insight Sugar Management (No Sugar, Sugar Free, Reduced Sugar, Low Sugar) attribute

Modern Health Meets Classic Snacks

Modern health is reshaping snacking, pushing even traditional and indulgent categories to **add benefits like protein, fiber, and reduced or alternative sugars** to capture key wellness-driven consumers and unlock larger future growth potential.

Sweet and savory snacks alike are evolving to meet modern wellness expectations, with both sides of the snacking spectrum redefining what it means to snack better.

Snacks with sugar management claims saw volume growth +14% versus one year ago,[2] with natural alternative sweeteners driving growth.

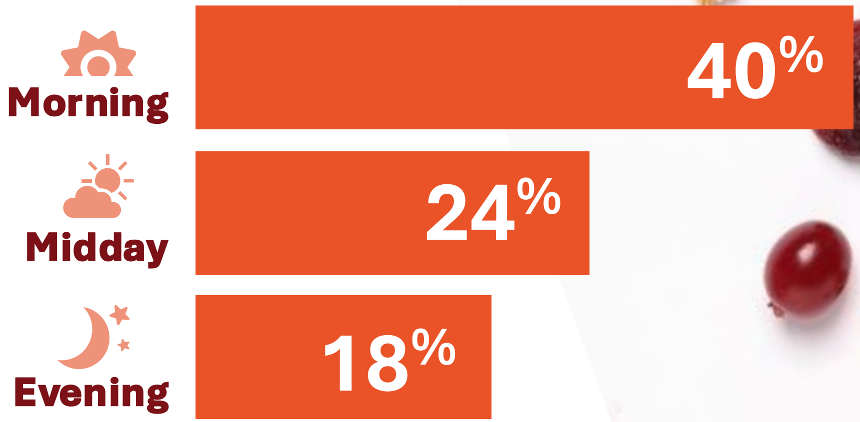
A viral homemade peach ring recipe video using natural sweeteners garnered 1.9 Million+ likes on TikTok

1. Source: TikTok, July 2025
2. Source: Circana, LLC, Circana, LLC, Total US – MULO+ with Conv and Label Insights, Total Future of Snacking Universe, Sugar Management Claims (No Sugar, Sugar Free, Reduced Sugar, Low Sugar) Volume Growth v. YA, YE Apr 20, 2025

While taste and cravings remain the top snacking motivations, **interest in snacks that are "filling" has grown 22% over the past four years.** Now the second most common reason for snacking, this trend shows a growing demand for nutrient-dense options that satisfy hunger and sustain energy.[1] Snacks do more than just satisfy a craving for consumers - they serve a purpose.

Time of Day When Snacks Lean Healthiest[3]

(Classified as better-for-you)



Online behavior reinforces this shift. Consumers are increasingly looking to integrate BFY snacks into their routines, not only through product choices but also through DIY preparation. Searches for healthy snack recipes continue to climb with **5.2 million visits to healthy snack recipe pages** in the past year alone, reflecting sustained interest in functional, wellness-driven snacking.[2]

1. Source: Circana, LLC, SnackTrack®, Total Motivations, % of Eating, YE Mar 2025
2. SimilarWeb Recipe Site Visits Data – L12M Through May 2025
3. Source: Circana, LLC, SnackTrack®, US, Snacking by Daypart, YE Dec 2024

Snacking for the GLP-1 Era

GLP-1 medication use is growing, with 7.4% of U.S. adults currently using these treatments (primarily for weight loss), and incidence rising steadily over the past two years.[1]

These medications reduce appetite and shift eating behaviors, prompting users to seek out smaller, more manageable portions and foods that offer functional health benefits, particularly **high protein** and **fiber.**[2]

Many snacks are uniquely positioned to meet these needs. With built-in advantages like **portion control, portability, and convenience,** they can fit easily into a GLP-1 user's routine, delivering satiety, nutrition, and ease throughout the day.

Popcorn is an ideal snack for GLP-1 users, offering fiber with a lower calorie count for mindful snackers.

1. Numerator (numerator.com) GLP-1 Target Group Deliverable, P12M ending 3/31/2025, Based on estimates derived from US Households
2. Source: On-going meta-analysis across Numerator, Circana, Blackswan, NewsWhip (September 2023 through March 2025)

All About Protein

Protein has become a key driver in the snacking space, with **protein-oriented snacks, such as nuts and seeds, expected to reach 56 billion eating occasions by 2027.**[4] These snacks are not tied to a single time of day, fulfilling a wide range of needs and demonstrating their versatility.

As the BFY snacking landscape evolves, **protein continues to emerge as a powerful unifier**—bridging inherently functional formats with those reinventing themselves to align with modern health goals. Its relevance extends across traditional wellness seekers and rising GLP-1 users, who prioritize nutrient density and satiety in their choices.

Online, "high protein snacks" were searched 1.1 million times in the past year, making it the most searched snacking occasion.[1]

The high-protein snack segment, now worth $3.8 billion, has grown 7% over the past three years, outpacing snacks without functional claims.[2] Protein is a top nutritional priority, especially for **Gen Z and Millennials**, who rank it as the #1 nutrient they seek.[3]

1. Source: SimilarWeb Google Search Data, Last 24 Months Through June 2025
2. Source: Circana, LLC, Total US – MULO+ with Conv, Future of Snacking Universe v. High Protein Future of Snacking, Dollar Sales & Volume Sales % Change v. 3YA, 52 WE May 25, 2025
3. Source: Circana, LLC, HABTS, Protein Snacks by Generation, % Consumers Seeking Protein, YE Dec 2024
4. Source: Circana, LLC, SnackTrack®, Protein Snack Foods (Cottage Cheese Cups, Meat Snacks, Energy/Sport/Nutrition Bars, Nuts & Seeds, Refrigerated Yogurt, String/Shape Cheese), % of Eatings, YE Dec 2027 v. 2024

TREND 4

Better Together: Co-Branded Bites

Craveable Flavors, Instant Recognition, and Cultural Relevance

Co-branded snacks with restaurant brands now total $965 million in annual sales, leveraging built-in crave appeal, restaurant-style flavor cues, and nostalgic familiarity.[1]

Meanwhile, **media and entertainment-licensed snacks are growing in popularity, now generating $466 million in annual sales.**[2] Featuring popular Hollywood franchises and cartoon characters, these products often target family snacking, lunchboxes, or collectible promotions.

Retail brand crossovers are gaining major traction, reaching $678 million in annual sales with 32% growth over the past three years. Co-branded innovation is especially prominent in meat snacks, salty snacks, cookies, and seeds, with categories that span both sweet and savory and naturally lending themselves to bold, indulgent flavor experiences.[3]

1. Source: Circana, LLC, Total US - MULO+ with Conv, US, Total Restaurant Co-Branded Licensing in Snacks, Dollar Sales, 52 WE Apr 20, 2025
2. Source: Circana, LLC, Total US - MULO+ with Conv, US, Total Media Co-Branded Licensing in Snacks, Dollar Sales, 52 WE Apr 20, 2025
3. Source: Circana, LLC, Total US - MULO+ with Conv, US, Total Retail Brand Co-Branded Licensing in Snacks, Total Dollar Sales and by Sub-Category, 52 WE Apr 20, 2025

Co-Branded Snacks Drive Bold Flavor Growth

Some of the fastest-growing co-branded snacks are rooted in bold flavor equities. Hot sauce and condiment brands such as Stubb's®, Frank's Red Hot®, Tapatio®, Hidden Valley Ranch®, and Mike's Hot Honey® are now appearing across a range of categories from chips to meat snacks, seeds, crackers, and more.[1]

On the sweet side, **collaborations with sour and chocolatey candy brands are gaining traction**, extending into cookies, bars, pudding, and bakery cakes. These products offer immediate flavor recognition and indulgent permission, bringing familiar treats into snackable, on-the-go formats.[1]

1. Source: Circana, LLC, Total US - MULO+ with Conv, US, Total Retail Brand Co-Branded Licensing in Snacks, Total Dollar Sales by Licensor Brand Name, 52 WE Apr 20, 2025

TREND 5

Snacks on the Go

Snack Time Anytime

Convenience has always been a cornerstone of snacking but is becoming more essential than ever as consumers return to busier, on-the-go routines. It's the fastest-growing macro-level motivation in the category and is **expected to see the largest growth by 2027.**[1]

Away-from-home snacking is on the rise, with annual snack occasions per person projected to jump 39% by 2027, surpassing even pre-COVID levels.[2] Kids and young adults are leading the charge as they head to school and work.

At home, snackers favor fresh options like fruit and yogurt. In the office, convenience wins. Granola bars, chips, and protein bars dominate, making it a prime occasion for packaged snacks to deliver on both function and flavor.[3]

Lunch is also an opportunity, with snack occasions tied to the midday meal up +22 points since 2021, highlighting another prime time for convenient, packable snacks.[4]

"On the move" continues to be one of the fastest growing snacking motivations, reflecting a desire for snacks that satisfy both hunger and lifestyle demands.[5]

1. Source: Circana, LLC, SnackTrack®, Snack Food Macro Need States, Annual Eatings Per Capita, YE Dec 2027 v. 2024
2. Source: Circana, LLC, SnackTrack®, Snack Foods Eaten Away From Home, Annual Eatings Per Capita % Growth, 2020 v. F2027
3. Source: Circana, LLC, SnackTrack®, Top Snack Foods, Work From Home Snacks v. Snack Foods at Work, % of Eatings, YE Dec 2024
4. Source: Circana, LLC, SnackTrack®, Snack Foods with/Instead of Meals, Annual Eatings Per Capita, 2024 v. 2021
5. Source: Circana, LLC, SnackTrack®, Snack Food Need States, Annual Eatings Per Capita, 2024 v. 2021

Impulse Meets Access

Seasonal trends drive demand for a variety of sized snacks, with lunchbox recipe ideas peaking in August for back-to-school.[3]

Convenience in snacking isn't just about grab-and-go packaging anymore, **it's about being everywhere consumers are**. Shoppers are increasingly buying snacks they plan to eat almost immediately, with a **growing share of snacks now being picked up within 30 minutes or less of consumption** versus four years ago. This shift is fueling impulse-driven purchases in places like gas stations and dollar stores.[1]

While grocery and mass channels still lead in sales, **the fastest growth is happening in online, gas & convenience, and club channels**, each requiring distinct product formats.[2]

From bulk buys online, to snack-sized treats at hardware and home-improvement store checkouts, **snacks are winning by showing up in more places, more often, in the right format for every occasion.**

Winning in snacking means **delivering the right solution at the right time**

1. Source: Circana, LLC, SnackTrack®, Trended When Obtained, % of Eatings, YE March 2025
2. Source: Numerator (numerator.com), Trended Share of Snack/Grocery Spend by Channel, Last 52 Weeks ending 5/25/25
3. Source: SimilarWeb Recipe Site Visits Data L24M Through June 2025 – recipes for "school lunch"

CONAGRA BRANDS

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