The Future of Snacking 2026

CONAGRA BRANDS

The Future of Snacking

2026

Conagra Brands, one of North America's leading food companies with iconic snack brands including Slim Jim® meat snacks, DAVID® seeds, BIGS® seeds, Angie's BOOMCHICKAPOP® popcorn, Duke's® meat snacks, FATTY® smoked meat sticks, Snack Pack® desserts, Glutino® gluten-free snacks and more, proudly presents the 2026 edition of **The Future of Snacking.**

Snacking is the largest and fastest evolving eating occasions in America. Consumers no longer define snacks by aisle or category. Instead, they increasingly choose foods that satisfy a specific need, whether they are looking for bold flavors, sustained energy or a more permissible way to indulge.

Rather than relying on traditional consumer surveys, our second annual report is grounded in observed consumer behavior. Conagra combines proprietary demand science with retail sales, consumption occasions, search activity, restaurant menu trends, digital behavior, AI conversation data and social engagement to understand not only what consumers are buying today, but also the behaviors shaping tomorrow's snack aisle.

This year's report explores three powerful forces influencing the future of snacking: **Bold Flavors, Functional Fuel and Permissible Indulgence.** Together, these themes illustrate how consumer expectations continue to evolve as snacks become more flavorful, more functional and more personalized than ever before.

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Understanding the Modern Snacking Landscape

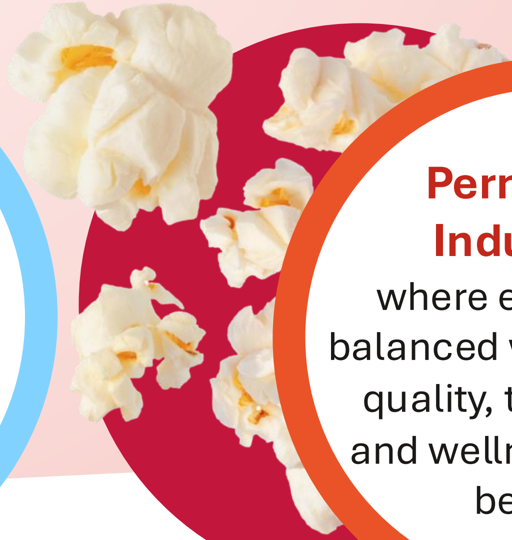
Traditional retail categories tell us what consumers buy, but they do not always explain *why* they buy.

To better understand the motivations behind modern snacking, Conagra developed a proprietary Snacking Demand Landscape using machine learning to analyze **more than 53 million shopping transactions across 17,000 snacking products**[1]. Rather than organizing snacks by grocery aisle, the analysis identified products that consumers typically purchase together, revealing the underlying behavioral patterns that drive snack decisions across categories.

This behavior-based approach identified three themes that are shaping the future of snacking. Together, these three themes provide the framework for the insights explored throughout this report:

Bold Flavors
where consumers seek excitement through flavor, sensory intensity and indulgent enjoyment.

Functional Fuel
where snacks provide protein, energy, satiety and/or practical nutrition throughout the day.



Permissible Indulgence
where enjoyment is balanced with ingredient quality, transparency and wellness-oriented benefits.

1. Conagra Snacking Demand Landscape, meta-analysis conducted in June 2025 using Circana, LLC, Total US-MULO+ with Convenience, 52 Weeks Ended April 20, 2025

The Expanding Definition Of Snacking

Snacking is an essential part of how Americans eat. **The U.S. snacking universe now represents $198.2 billion in annual retail sales[2], growing 3.1% versus the prior year[3] and 2.9% annually over the last three years, approximately 1.4 times faster than the broader food market[4].** While traditional snack categories continue to anchor the market, consumers are increasingly expanding their definition of what qualifies as a snack. Today, the snacking universe spans shelf-stable, refrigerated and frozen foods, reflecting a more diverse and dynamic eating occasion than ever before.

Traditional snacks remain at the heart of the category. **Salty snacks, candy and cookies account for nearly 46% of total snack sales [5],** demonstrating that familiar flavors and indulgent favorites continue to play an important role in consumers' daily routines. At the same time, some of the strongest growth is coming from categories that deliver greater nutrition, satiety and versatility, illustrating how consumer expectations for snacks continue to evolve.

Protein-forward categories represent more than $20 billion in annual sales[6], with dried meat sticks representing $5.7 billion and a 9.5% growth year over year[7]. These categories contribute almost 30% of total snack dollar growth over the past three years[8], reflecting consumers' growing desire for snacks that provide both enjoyment and nourishment.

2. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 Weeks Ending April 19, 2026
3. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, % Change Dollar Sales vs. Dollar Sales YA, 52 WE April 19, 2026
4. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate and Total Edible excluding Beverages, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026
5. Circana, LLC, Total US - MULO + with Conv, Salty Snacks, Chocolate Candy, Cookies, and Non-Chocolate Candy, Dollar Sales Share of Snacking Universe Aggregate, 52 WE April 19, 2026
6. Circana, LLC, Total US - MULO + with Conv, Yogurt, Cottage Cheese, Dried Meat Snack, Dollar Sales, 52 WE April 19, 2026
7. Circana, LLC, Total US - MULO + with Conv, Dried Meat Snacks, Dollar Sales and Dollar Sales % Change vs. YA, 52 WE April 19, 2026
8. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate and Dried Meat Snacks, Dollar Sales Change vs. 3YA, Share of Snacking Universe Aggregate, 52 WE April 19, 2026

Snacking Is Bigger Than Any Single Meal Occasion

Snacking has become the largest eating occasion in the United States, accounting for nearly

272 Billion

annual eating occasions[9]

As schedules become more dynamic and eating patterns continue to evolve, snacks increasingly fill moments that once belonged exclusively to breakfast, lunch or dinner.

Consumers are also increasingly using snacks to replace traditional meals. **Snack-as-meal occasions reached 56 billion annually, an 18% increase in the last six years, driven by younger consumers like Gen Alpha and Gen Z, who increased snack-as-meal occasions 39% over the same time period[10].** When consumers replace meals with snacks, they increasingly reach for products that offer greater satiety and nutritional value[11].

9. Circana, LLC, National Eating Trends®, Sourced from Home/Retail, Annual Eating Occasions, Between Meals, YE March 2026
10.Circana, LLC, SnackTrack®, YE March 2026 vs. YE March 2020
11.Circana, SnackTrack®, 12ME March 2026 Excludes beverages

Digital Discovery Is Reshaping How Consumers Find Snacks

E-commerce is playing a growing role in snack discovery, accounting for...

13% of snack dollar sales, up two points year over year[12]

64% higher basket values than in-store purchases[13]

41% 36% with meat snacks and seeds among the fastest-growing e-commerce categories, up 41% and 36%[14], respectively

At the same time, consumers are increasingly turning to AI for snack recommendations and nutrition guidance. Rather than searching broad terms like "protein snacks," they are asking highly specific questions such as, *"What is the best low-calorie protein snack?"* These conversations provide a real-time view into how consumers evaluate snacks, prioritize functional nutrition and make purchase decisions, highlighting the growing influence of AI on product discovery[15].

"What is the best low-calorie protein snack?"

12. Circana, LLC, Total US - MULO+ eCommerce, Snacking Universe Aggregate, Dollar Sales Share of Total US-MULO+, Current and Share Point Change vs. YA, 52 WE April 19, 2026
13. Circana, LLC, Total US - Omnicommerce, Snacking Universe Aggregate, Dollar Sales per Trip of Total Brick & Mortar vs. Total eCommerce, 52 WE June 14, 2026
14. Circana, LLC, Total US - MULO+ eCommerce, Dried Meat Snacks and Sunflower/Pumpkin Seeds, Dollar Sales % Change vs. YA, 52 WE April 19, 2026
15. Stackline, AI Queries, 52 WE March 21, 2026, meta-analysis

Bold Flavors

Bold Flavors

Flavor remains one of the most powerful drivers of snack choice, but today's consumers are looking for more than familiar tastes. They increasingly seek snacks that surprise, entertain and deliver memorable sensory experiences. Consumers are gravitating toward layered dessert flavors, **sweet and spicy combinations, tangy and briny profiles, fruit-forward innovation** and beverage-inspired flavors that bring new energy to familiar snack formats.

While classic flavors remain foundational, growth is increasingly coming from products that build on familiarity with greater complexity, premium cues and unexpected combinations. Younger consumers, particularly Gen Z, continue to accelerate this shift as they seek snacks that are as exciting as they are satisfying.

Comfort Favorites Get an Upgrade

Elevated comfort flavors represent $27.3 billion in retail sales and grew 6.4% versus the prior year[1]. While chocolate peanut butter, dark chocolate and caramel chocolate remain the category's largest flavors, the fastest-growing profiles tell a different story.

The flavors that are driving growth over the last three years like **Dubai chocolate, cinnamon bun and cookie butter[3]** recreate complete dessert experiences rather than simple sweet tastes. Consumers are increasingly choosing snacks that layer multiple flavors and textures together, transforming everyday indulgence into something that feels more premium. Gen Z is helping lead this evolution, with **spending in this flavor space growing 9%, roughly seven times faster than Gen Z's overall snacking growth[4].**

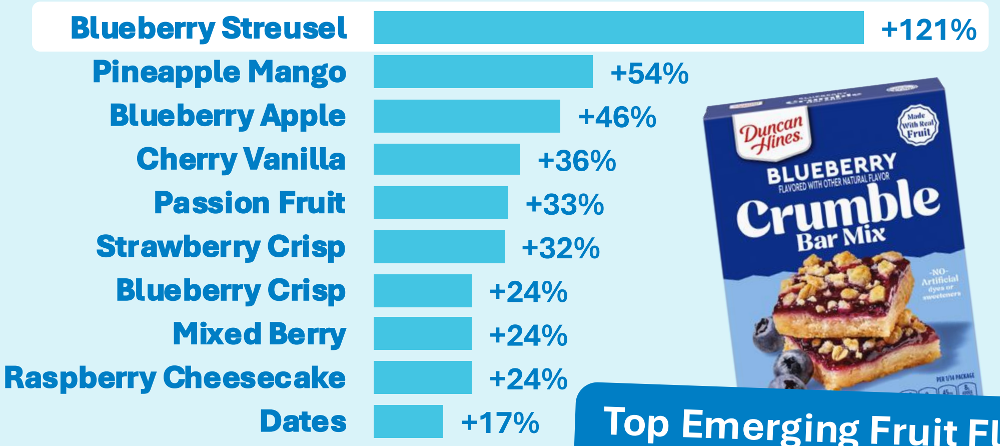
1. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet Flavor Profiles, Dollar Sales and % Change Dollar Sales vs. Dollar Sales YA, 52 WE April 19, 2026
2. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet Flavor Profiles, Dollar Sales, 52 WE April 19, 2026
3. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet Flavor Profiles, Dollar Sales, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026, Filtered to flavors with minimum $20MM in retail sales
4. Circana, LLC, Receipt Panel, Total US-All Venues, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet Flavor Profiles, HH Generations, % Change Dollar Sales per Buyer vs. Year Ago, 52 WE June 28, 2026

Fruit Gets Bolder

Fruit remains one of the largest flavor platforms in snacking, generating **$26.4 billion in retail sales** and growing 6.0% versus the prior year[5].

Familiar fruits such as **strawberries, mixed berries, cherries and blueberries** continue to dominate the category, but consumers are increasingly embracing fruit flavors that feel brighter, more indulgent and more adventurous.

Top Fruit Flavors by Size (in Billions)[6]



Top Emerging Fruit Flavors by Growth[7]

Emerging combinations such as **pineapple mango, blueberry streusel**, **cherry vanilla and raspberry cheesecake** demonstrate how brands are pairing fruit with bakery and dessert cues to create richer flavor experiences.

Viral Recipes Turn Dates Into Candy-Inspired Treats

+146%
website visits to recipes featuring dates vs. prior year[8]

8 Million
social interactions for date recipes, fueled by stuffed dates and date bark[9]

5. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Fruit Flavor Profiles, Dollar Sales and % Change Dollar Sales vs. Dollar Sales YA, 52 WE April 19, 2026
6. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Fruit Flavor Profiles, Dollar Sales, 52 WE April 19, 2026
7. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Fruit Flavor Profiles, Dollar Sales, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026, Filtered to flavors with minimum $20MM in retail sales
8. Similarweb, Food and Drink Recipes, Contains "Dates", 12 Months Ended May 2026
9. Newswhip, Social Media Recipe Interactions, Contains "Dates", 12 Months Ended April 2026

Sweet Heat Finds New Balance

Sweet and spicy flavors have evolved from niche innovation into one of snacking's fastest-growing flavor platforms. **Chili lime already represents approximately $1 billion in annual sales, while sweet chili approaches $400 million[10],** demonstrating that consumers increasingly prefer balanced heat over extreme spice.

Top Sweet Heat Flavors by Size
(in Millions)[10]

Flavor	Sales
Chili Pepper	$1,263
Chili Lime	$1,038
Sweet Chili	$399
Jalapeno Cheddar	$387
Chipotle	$120
Habanero	$96
Hot Honey	$75
Wasabi	$60
Sriracha	$57
Jalapeno Lime	$44

Top Emerging Sweet Heat Flavors by Growth[11]

Flavor	Growth
Hot Honey	+183%
Hot/Spicy Mustard	+153%
Watermelon Chili	+24%
Sriracha	+19%
Chili Crisp/Crunch/Oil	+17%
Chipotle Bbq	+11%
Sweet Chili	+8%
Hatch Chili	+7%
Chipotle	+6%
Habanero	+3%

10.Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet and Spicy Profiles, Dollar Sales, 52 WE April 19, 2026
11.Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet and Spicy Flavor Profiles, Dollar Sales, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026, Filtered to flavors with minimum $5MM in retail sales

Innovation continues to push the category forward. While hot honey and hot mustard are leading the charge, **watermelon chili, chili crisp and sriracha** continue to gain momentum as consumers seek flavor combinations that balance sweetness, acidity and heat rather than relying on intensity alone.

Gen Z spends the highest share of its snack dollars within this flavor space[12], reinforcing the role younger consumers play in shaping the next generation of bold flavors.

Game Day Makes Fall America's Biggest Social Snacking Season

During football season, dips are the MVP, **accounting for 19% of social media interactions with snack and appetizer recipes[13]. RO*TEL sales also rise approximately 24%[14]** during the football season as consumers prepare game day favorites such as queso and salsa. **RO*TEL is gaining traction as a go-to recipe ingredient, with Instagram interactions up 89% versus the prior year[15].** Together, these behaviors reinforce that football season is one of the year's most important occasions for celebratory and social snacking.

12. Circana, LLC, Receipt Panel, Total US-All Venues, Snacking Universe Aggregate, Multi-Attribute Flavors, Sweet-Heat Flavor Profiles, HH Generations, % Share of Dollar Sales, 52 WE June 28, 2026
13. Newswhip, Social Media Recipe Interactions, Snacks and Appetizers, Contains "Dip", "Hummus", "Salsa", "Queso" or "Spread", September 2025-February 2026
14. Circana, LLC, Total US - MULO+ with Conv, Rotel Canned Tomatoes, % Change Weekly Average Dollar Sales across September-February 2025 vs Weekly Average Dollar Sales within 52 WE April 19, 2025
15.Newswhip, Instagram Recipe Interactions vs YA, "Ro-Tel", 12 Months Ended August 2026

Pickle Opens the Door To Briny Innovation

Pickle flavors continue to be one of the most recognizable trends across the snack aisle **amassing**

$1.8 Billion

in retail sales[16], expanding well beyond chips into popcorn, sunflower seeds, meat snacks and pretzels. Yet, the broader opportunity may lie beyond pickle itself.

Consumers are increasingly embracing a wider family of tangy and briny flavors, such as malt vinegar, pickled ginger and pickled beets. Together, these flavors suggest consumers are becoming more comfortable with sharper, fermented and vinegar-forward taste profiles. **Gen Z continues to lead the trend, growing spend on tangy and briny snacks 12%, or 2.3 times faster than the overall market**[17].

16. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Pickle Flavor/Form Attributes, Dollar Sales, 52 WE April 19, 2026
17. Circana, LLC, Receipt Panel, Total US-All Venues, Snacking Universe Aggregate, Multi-Attribute Flavors, Tangy & Briny Flavor Profiles, HH Generations, Dollar Sales vs Dollar Sales YA, 52 WE June 28, 2026

Beverage Flavors Cross Into Snacks

Top Emerging Beverage Flavors by Growth[19]

Consumers increasingly recognize flavors first through beverages before discovering them in snacks. **Beverage-inspired flavors now represent approximately $2.8 billion in retail sales[18]**, led by familiar café and confectionery profiles such as mint, coffee and peppermint.

Growth, however, is coming from brighter beverage-inspired flavors. **Citrus-focused products like limeade and lemonade variations are growing at double-digit rates over the last three years[19].** These familiar drink flavors are increasingly appearing in cookies, frozen desserts, candy, and snack bars giving established snack formats a fresh source of innovation while capitalizing on flavors consumers already know and enjoy.

18. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Beverage Flavor Profiles, Dollar Sales, 52 WE April 19, 2026
19. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Multi-Attribute Flavors, Beverage Flavor Profiles, Dollar Sales, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026, Filtered to flavors with minimum $5MM in retail sales

Functional Fuel

Functional Fuel

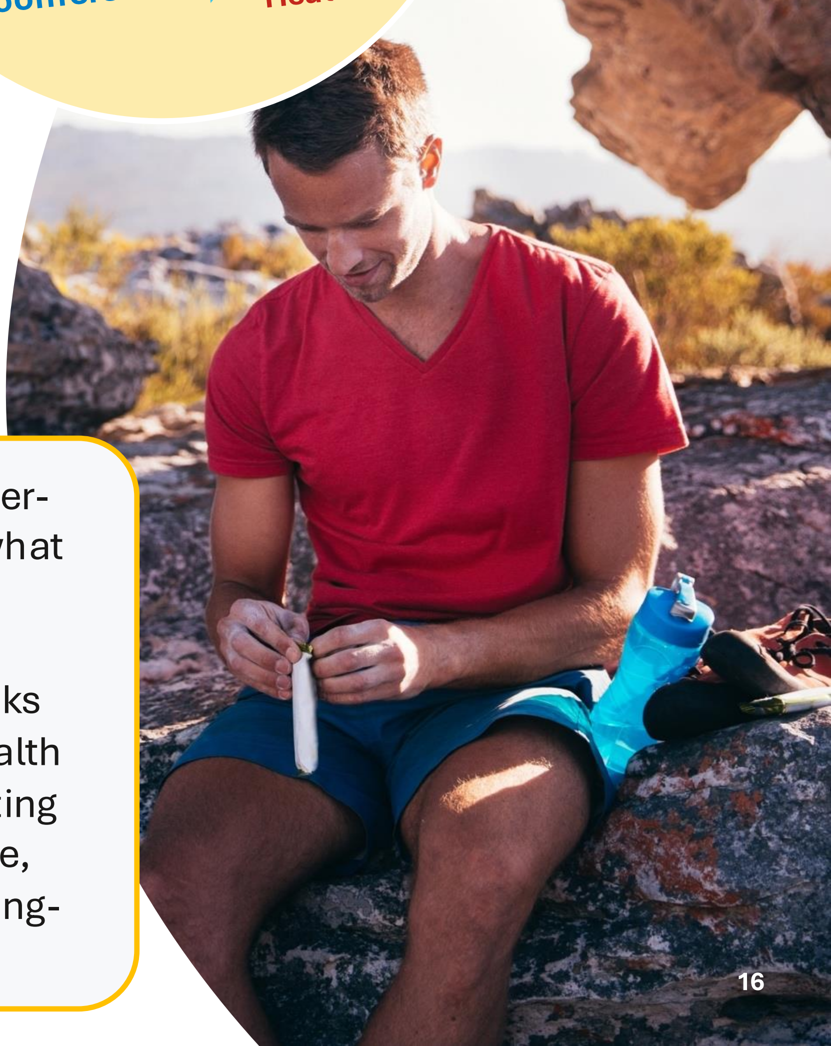
Consumers Expect Snacks to Do More. Today's consumers expect snacks to deliver functional benefits that help them feel, perform, and live better throughout the day. Protein remains the foundation of this shift, but functional fuel has expanded well beyond a single nutrient.

Consumers are now seeking snacks that support energy, digestion, hydration, satiety and overall wellness, often looking for several benefits in a single product. As a result, functional fuel has become one of the fastest-growing behavioral spaces in snacking, with **products delivering targeted health benefits growing 12.7% in retail sales vs the prior year, reaching $19 billion[1].**

Unlike previous generations of better-for-you products that focused on what foods removed, today's functional snacks emphasize what they add. Consumers increasingly seek snacks that help them achieve specific health goals, whether that means supporting gut health, increasing protein intake, maintaining energy or promoting long-term wellness.

Functional Priorities Differ by Generation[2]...

- Gen Z → Energy + Protein
- Millennials → Probiotics + Antioxidants
- Boomers → Digestive Health



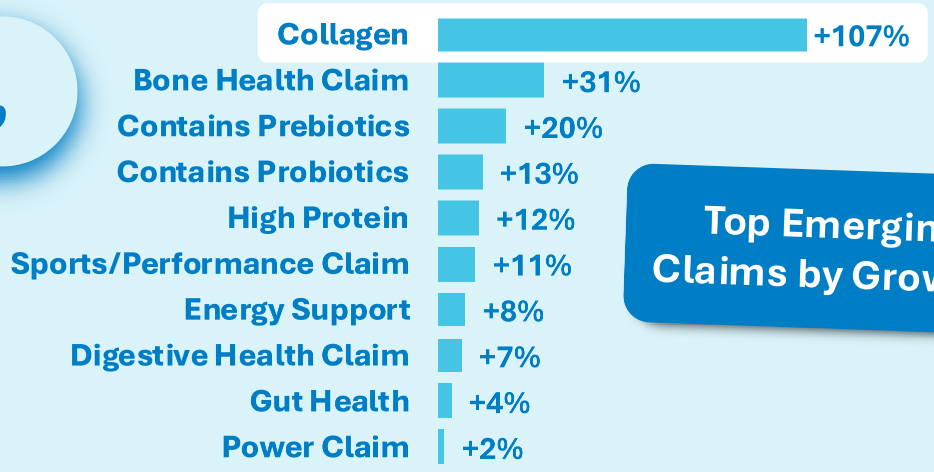
1. Circana POS, Total U.S. MULO+ with Convenience, Syndicated Hierarchy, 52 Weeks Ended April 19, 2026; NIQ Product Explorer, Powered by Label Insight contains aggregate on-pack claim ‘Functional Fuel’ attributes.
2. Circana, National Eating Trends®, sourced from home/retail, one year ending April 2026; “Trying to Get More.”

Protein Has Become the Foundation, Not the Finish Line

Protein continues to anchor functional fuel, with **high protein snacks equating to $12.1 billion[3],** but consumers increasingly expect more than protein alone. Products are combining multiple nutritional benefits to create more complete functional solutions.

Products featuring collagen, fiber, probiotics and other vitamins and minerals have grown in dollars over the past three years[4], reflecting consumers' growing interest in multifunctional products.

Top Emerging Claims by Growth[4]



Bone broth is moving beyond the soup aisle and into snacking

Snack products carrying a "contains bone broth" claim represent approximately $49.8 million in sales[5]

+67% three-year annual growth rate in volume[6].

Meat snacks continue to demonstrate the versatility of protein as a functional ingredient. Naturally protein-forward and highly portable, meat snacks increasingly serve as convenient sources of sustained satiety throughout the day. But the category is continuously evolving to offer consumers the additional benefits they need to fuel their day besides protein. Emerging meat snacks feature functional ingredients like bone broth and collagen, illustrating how snacks are building upon protein rather than replacing it.

3. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026
4. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026
NIQ Product Explorer, Powered by Label Insight contains aggregate on-pack 'Functional Fuel' attributes.
5. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026
NIQ Product Explorer, Powered by Label Insight contains "Contains Bone Broth" attribute.
6. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026
NIQ Product Explorer, Powered by Label Insight contains "Contains Bone Broth" attribute.

The Next Wave of Functional Fuel Is Benefit Bundling

Consumers increasingly expect one product to deliver multiple benefits simultaneously. Protein remains the starting point, but the fastest-growing products increasingly combine protein with fiber, digestive health, hydration or other functional claims.

"Protein + Fiber"

Categories such as **seeds and ready-to-eat popcorn** naturally illustrate this evolution. Both provide fiber alongside additional nutritional benefits while remaining familiar, convenient snack formats. As consumers increasingly evaluate snacks based on the combination of benefits they deliver, products that successfully bundle multiple functional attributes are likely to define the next generation of functional fuel.

Online behavior reflects this shift:

Searches **for protein + fiber increased 71%** versus the prior year, while searches combining **protein + health grew 51%[10].**

At the same time, **fiber is emerging** as one of the next major opportunities within functional nutrition.

Although most adults already meet recommended protein intake, **fiber remains significantly under consumed[11]**, creating substantial opportunities for products that combine both nutrients.

Over the past twelve months, Google searches related to fiber reached **89 million**, **growing 19% vs the prior year[12]**, while more than one-third of adults report actively trying to increase fiber consumption[13].

10.Similarweb, google Search Trends, Searches for "Protein & Fiber", "Protein & Health", 12 Months Ended May 2026
11.Annual Review of Food Science and Technology, "Optimizing Dietary Fiber Intake: Strategies for Human Nutrition and Food Science," December 19, 2025
12.Similarweb, Google Search Trends, Food/Beverage and Health Categories, Searches for "Fiber", 12 Months Ended May 2026
13.Circana, National Eating Trends®, sourced from home/retail, one year ending April 2026; "Trying to Get More.

Permissible Indulgence

Permissible Indulgence

Consumers Are Redefining What It Means to Indulge.

Indulgence remains one of the most enduring reasons consumers snack, but the definition of a "better" indulgence continues to evolve. Rather than choosing between enjoyment and wellness, consumers increasingly expect snacks to deliver both.

In addition to relying solely on traditional cues such as fewer calories and lower fat, consumers are paying closer attention to ingredients, sourcing, nutrition and transparency while still seeking products that satisfy cravings and deliver moments of enjoyment.

Consumers Are Looking Beyond "Free-From"

Products featuring cues such as recognizable ingredients, simpler formulations and fewer artificial additives now represent approximately $69.4 billion in annual snack sales[1]. Products positioned around more explicit nutrition benefits, such as lower sugar, lower calories or digestive health, account for an additional $71.7 billion[2].

Rather than relying solely on broad claims such as non-GMO or free of artificial flavors, consumers increasingly seek more specific indicators of transparency, including avocado oil, grass-fed ingredients, bone broth, nitrate-free products and formulations made without seed oils.

This shift is particularly pronounced among younger consumers. **Gen Z is 51% more likely than the average consumer to report following a clean-eating diet, while Millennials are 35% more likely[3]. Millennials with children are also more likely to seek organic foods.[4]** Together, these behaviors point to growing interest in ingredient transparency, including clear, specific information that helps consumers understand what a product contains, particularly among younger consumers and families.

1. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026.
   NIQ Product Explorer, Powered by Label Insight contains aggregate of on-pack claim attributes.
2. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026.
   NIQ Product Explorer, Powered by Label Insight contains aggregate of on-pack claim attributes.
3. Circana, LLC, National Eating Trends, Sourced from Home/Retail, % of Respondents Following Diet, YE April 2026.
4. Circana, LLC, National Eating Trends, Sourced from Home/Retail, % of Respondents Trying to Get More, YE April 2026.

Ingredient Transparency Is Becoming a Differentiator

Consumers are paying closer attention not only to ingredients themselves, but also to how those ingredients are sourced and produced.

Products carrying **oil-related claims now represent approximately $1.7 billion in annual snack sales[5] while growing 14% over the last three years[6].** Within that space, products **containing avocado oil are growing volume 82% over three years[8], while products positioned as seed-oil-free** continue to gain momentum as consumers seek ingredients they perceive as simpler.

Top Emerging Claims by Growth[7]

5. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Contains Olive Oil", "Contains Avocado Oil", "Palm Oil Free", "Contains Coconut Oil", "Partially Hydrogenated Oil Free", "Seed-oil Free" attributes.
6. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Contains Olive Oil", "Contains Avocado Oil", "Palm Oil Free", "Contains Coconut Oil", "Partially Hydrogenated Oil Free", "Seed-oil Free" attributes.
7. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight, aggregate of multiple on-pack claim attributes.
8. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Contains Avocado Oil" attributes.

As oil claims gain visibility, tallow is beginning to draw interest both online and on shelf.

Volume sales **of products featuring tallow jumped approximately 206% versus the prior year[9]**, while the ingredient generated nearly **11 million Google searches over the past 12 months[10].**

"Beef Tallow"

Animal sourcing is evolving in a similar way. **Grass-fed products now represent approximately $720 million in annual snack sales[11] while growing 47.7% on a three-year volume basis, approximately 2.4 times faster than the broader market[12].**

Growing Meat Snacks Claims[13]

Antibiotic-Free +92%

100 Percent Grass-Fed +78%

Hormone-Free +54%

9. Circana, LLC, Total US - MULO + with Conv, "Tallow", % Change Volume Sales vs Volume Sales 1 Year Ago, 52 WE April 19, 2026.
10. Similarweb, Google Search Trends, Searches for "Tallow", 12 Months Ended May 2026
11. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Grass Fed" attributes.
12. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Grass Fed" attributes.
13. Circana, LLC, Total US - MULO + with Conv, Dried Meat Snack Category, CAGR % Change Volume Sales vs Volume Sales 3 Years Ago, 52 WE April 19, 2026. NIQ Product Explorer, Powered by Label Insight contains "Antibiotic Free", "Grass Fed", and "Hormone Free" attributes.

Better-for-You Gets More Specific

Consumers continue to seek healthier snack choices, but their priorities are becoming more targeted. Rather than looking broadly for "healthy" snacks, they increasingly evaluate products through specific nutritional attributes that align with their personal needs.

Sugar tops the list of what consumers are trying to cut back on, with **47% of adults saying they are trying to consume less**[14]. Reduced-sugar products, including **no sugar added** claims, now represent approximately **$2.6 billion** in annual snack sales[15].

Prepared pudding and gelatin products with a sugar-related claim are growing **12 times** faster than the broader category[16].

Digestive health is another way consumers are defining what "better for you" means in snacking.

Gut health generated over 24 million Google searches in the past year[17].

Gluten-free is the largest signal in this space, representing approximately **$51.0 billion in snack sales,** while baked products follow at $12.8 billion[18], offering a gentler alternative to fried.

Together, these trends demonstrate that **consumers increasingly define wellness through highly personal nutritional priorities** rather than one universal definition of healthy eating.

14. Circana, LLC, National Eating Trends, Sourced from Home/Retail, % of Respondents Trying to Get Less, YE April 2026.
15. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026.
NIQ Product Explorer, Powered by Label Insight contains "Sugar Free" and "Zero Sugar" attributes.
16. Circana, LLC, Total US - MULO + with Conv, Prepared Pudding/Gels Category, CAGR % Change Dollar Sales vs Dollar Sales 3 Years Ago, 52 WE April 19, 2026.
NIQ Product Explorer, Powered by Label Insight contains "Sugar Free" and "Zero Sugar" attributes.
17. Similarweb, Google Search Trends, Searches for "Gut Health" "Digestion" "Digestive", 12 Months Ended May 2026.
18. Circana, LLC, Total US - MULO + with Conv, Snacking Universe Aggregate, Dollar Sales, 52 WE April 19, 2026.
NIQ Product Explorer, Powered by Label Insight contains "Gluten Free" and "Baked" attributes.

The Rise of the Self-Informed Shopper

Consumers are placing greater trust in their own research than ever before. Digital tools now allow shoppers to evaluate ingredients, nutrition information and health claims while standing in the grocery aisle, changing how purchasing decisions are made.

Gen Alpha Parents Scan Before They Snack

Parents of Gen Alpha children are **twice as likely as the average shopper to use scanning tools** while making snack purchases[22].

Ingredient scanning applications continue to grow in popularity:

22% of shoppers use third-party scanning tools, up from 17% just one year earlier[19].

Among users, commonly attributes are: **sugar content (49%), protein content (39%), and calorie content (37%)**[20].

87% of scan-app users report they are likely to put a product back if it receives a poor ingredient rating or contains ingredients they wish to avoid[21].

As ingredient information becomes more accessible, front-of-pack claims are no longer the only source of reassurance. Consumers increasingly verify products independently, creating new expectations for transparency and trust across the snack aisle.

19.NIQ BASES Quick Question Survey, May 2025 and June 2026; use of third-party scanning apps to check ingredients.
20.NIQ BASES Quick Question Omnibus Survey, March 2026, n=2,024; evaluation criteria among snack buyers using scanning apps.
21.NIQ BASES Quick Question Omnibus Survey, January 2026, n=2,006; likelihood of returning low-scoring or artificially flagged products to shelf.
22.NIQ BASES Snacking Survey, n=2,024, 2026; Gen Alpha parents' use of scanning apps.

Conclusion

Conclusion

The Future of Snacking Is Being Shaped Before Consumers Ever Reach the Shelf

Snacking has never offered consumers more choice. From protein-forward meat snacks to indulgent desserts, bold flavors and simpler ingredient claims, today's snack aisle reflects an increasingly diverse set of consumer needs.

At the same time, the ways consumers discover, evaluate and purchase snacks are changing just as quickly as the products themselves.

Throughout this report,
three themes consistently emerged.

Consumers continue to seek **Bold Flavors**, turning to snacks that deliver richer flavors, greater sensory experiences and new forms of excitement.

They increasingly rely on **Functional Fuel**, expecting snacks to provide meaningful nutrition, sustained energy, as well as other benefits that support everyday performance.

They also continue to embrace **Permissible Indulgence**, looking for products that satisfy cravings while aligning with their evolving definitions of wellness, ingredient quality and transparency.

Together, these themes demonstrate that consumers are asking more of snacks than ever before. They no longer simply ask whether a snack tastes good. They increasingly evaluate whether it delivers the right balance of enjoyment, nutrition, convenience, and value for the moment.

Artificial intelligence provides an entirely new window into those evolving expectations. Rather than simply searching for products, consumers are increasingly asking conversational questions that reveal the tradeoffs behind every purchase decision. They want to know which snack provides the most protein, which option contains cleaner ingredients, which product is better for their family or which choice best supports their personal goals. These questions illustrate that snack decisions are becoming increasingly individualized and that consumers expect brands to help them navigate a more complex marketplace.

For manufacturers and retailers, the opportunity extends well beyond launching the next successful flavor or functional claim. Success will increasingly come from understanding the consumer needs that transcend traditional categories and recognizing how those needs continue to evolve. Products that deliver memorable experiences, meaningful functionality and trusted ingredients while remaining convenient and enjoyable will be best positioned to meet the next generation of snack expectations.

The future of snacking will not be defined by one ingredient, one flavor or one format.

It will be defined by how well brands understand the evolving role snacks play in consumers' everyday lives.

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