NCA sweet INSIGHTS 2026

STATE OF TREATING

A Bite-Sized Taste

The 7th annual *State of Treating* reflects on confectionery shopping and treating trends in 2025 — a year when sustained macro headwinds shaped confectionery spending, particularly for financially tight or struggling households. The study includes an in-depth category performance review along with the *how* and *why* behind the numbers to help uncover category growth opportunities in 2026 and beyond.

This *Bite-Sized Taste* presents study highlights. The full *State of Treating* 2026 report is available **here**

KEY FACTS AND FIGURES

Across all outlets, including vending, e-commerce, candy stores, etc., confectionery sales reached $55 billion in 2025. A little over half of sales were driven by chocolate, though ongoing share gains by non-chocolate signal a gradual shift in category momentum.

CHOCOLATE	NON-CHOCOLATE CANDY	GUM
$28.4B	$22.5B	$4.1B
51.7% of sales	40.9% of sales	7.4% of sales

$55B

Source: Euromonitor | Passport Model December 27, 2025

Euromonitor includes mints in non-chocolate candy

In the Circana-measured marketplace that includes grocery, mass, club, commissaries, convenience, drug, and dollar stores, 2025 U.S. confectionery sales reached $42.5 billion – a 5.3% YOY dollar increase driven by inflation. Unit and volume sales declined for the fourth year in a row, with chocolate shouldering most of the pressure. Non-chocolate candy came closest to year-ago levels in units and volume, while inflation boosted dollar sales. Gum and mint sales trailed in units and equivalized volume but was ahead in dollars.

Chocolate $23.3B	+6.7% $ change vs. YA -1.5% unit change vs. YA
Non-Chocolate Candy $14.0B	+3.0% $ change vs. YA -1.1% unit change vs. YA
Gum & Mints $4.9B	+5.1% $ change vs. YA -2.9% unit change vs. YA

Source: Circana, Total U.S., MULO+ with Convenience, 52 w.e. 12/28/2025

Produced by: NCA Always A Treat; 210analytics

Made financially possible by: Blommer Chocolate Company

Category data provided by: Circana.

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Download the report at: CandyUSA.com/StateOfTreating

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Study Highlights

MARKETPLACE OVERVIEW

In 2025, continued economic challenges forced budget trade-offs for a majority of consumers. Finances have an overriding impact on purchases, with 55% of households indicating they need to budget or cut back, or that they are struggling to afford the basics. Despite these economic challenges, confectionery still enjoys high levels of engagement, with 44% enjoying confectionery multiple times per week. Virtually all confectionery consumers will splurge regardless of their financial situation, most often for a beloved brand, a special occasion, or a holiday.

2025 PURCHASE DYNAMICS

In 2025, 99.8% of households purchased confectionery at least once. Consumers bought treats a little less frequently but also switched between retail channels, pack sizes, types, and brands to stretch their confectionery dollar. This led to category unit and volume declines, especially for chocolate.

TOTAL CMG BUYING TRENDS 2025

99.8% | 0.0%	50.2x | -0.8%	103.3 | -1.8%	$7.02 | +5.0%	$352.43 | +4.3%
Households Buying	Annual Trips/Buyer	Annual Units/Buyer	$/Trip	Annual $/Buyer

Source: Circana, Total U.S., Omnichannel, Receipt Panel, 52 w.e. 12/28/2025

PREFERENCES

Confectionery is a beloved treat across incomes and ages, but there are meaningful differences in generational preferences that are driving significant shifts in category performance. More than half of Gen X and Boomer consumers, reinforced by Gen Z and Millennials, name milk chocolate as America's most loved confection. Gen Z and Millennials over-index for gummy and chewy, hard, and freeze-dried candy, as well as candies with changing textures.

		% ♡ by Generation			
	TOTAL ♡	GEN Z	MILLENNIALS	GEN X	BOOMERS
Milk Chocolate	92%	40%	43%	50%	54%
Dark Chocolate	79%	36%	38%	38%	46%
Gummy and Chewy Candy	76%	38%	39%	26%	8%
Hard Candy and Lollipops	66%	24%	24%	15%	7%

CONSUMERS STICK WITH THEIR FAVORITES

Choice when money is tight and changes are necessary...

64% I'd rather have less but still get my favorite

36% I'd rather explore different brands or types than have less

MINDFUL SHOPPING

Price dominated the purchase decision again in 2025, followed by brand and mood. More than 90% of shoppers across generations create a list before shopping for groceries online or in store. Other money-saving measures include seeking out promotions, going with private brand alternatives (though a less important strategy than in 2024), buying different confectionery items and different pack sizes, and turning to value-focused stores for chocolate and candy purchases. Trips shifted to value-forward channels, including hard discounters and club stores. E-commerce remained a growth channel.

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SEASONS AS A PERCENTAGE OF 2025 ANNUAL CHOCOLATE AND CANDY DOLLAR AND VOLUME SALES

	% OF 2025 DOLLAR SALES	% OF 2025 VOLUME SALES
Valentine's Day	13.0%	12.3%
Easter*	13.0%	12.8%
Halloween	18.4%	20.6%
Winter Holidays	18.8%	17.3%
Total Seasonal Period Sales	**63.2%**	**63.1%**

Source: Circana, Total U.S., MULO+ with Convenience, 52 w.e. 12/28/2025 | *The Easter share is highly dependent on the number of weeks, in this case, the six weeks ending 4/20/2025

CELEBRATIONS

Consumers have been recalibrating their spending since the early pandemic years, such that the sales contributions by each of the four big holiday seasons are nearly back to 2019 levels – and total chocolate and candy sales generated during the four seasonal periods account for almost two-thirds of annual dollar and volume sales. This tracks with the nearly half of consumers who make sharing seasonal confectionery a budget priority. Consumers like to celebrate the seasons in style, with 82% wanting holiday-specific items with special packaging, shapes, and flavors. In 2025, seasonally-coded items grew in dollars and volume, outperforming everyday items.

GIFTING

Beyond holiday sharing, consumers gift chocolate and candy for many occasions. About 1 in 5 are gifting confectionery for special occasions or buying confectionery for seasonal sharing more often than last year.

REASONS FOR GIFTING CONFECTIONERY OUTSIDE OF THE BIG FOUR CONFECTIONERY HOLIDAYS

47%
Secondary holiday (Mother's Day, etc.)

40%
Cheer someone up

40%
Thank you/show appreciation

INNOVATION

Confectionery is a highly innovative category, with new items driving a substantial share of sales, as well as engagement with younger consumers; about 1 in 5 Gen Z and Millennial consumers tries something new at least once a month. Unexpected new flavors or flavor combinations are the most likely to encourage trying something new, though generational and income differences are substantial. Nearly one-quarter of consumers are interested in nostalgic or retro candies. Discovery happens both in store and online, with social media dominating among younger consumers.

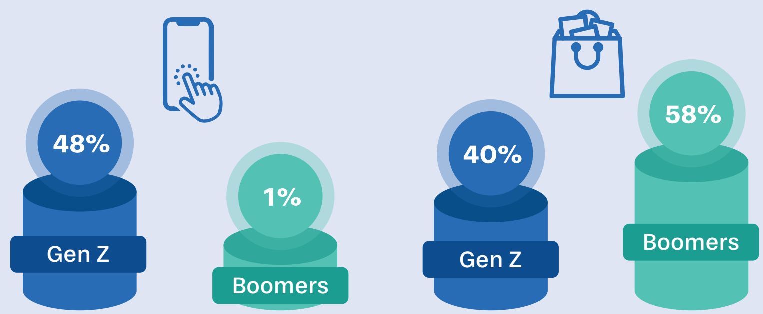
TOP INNOVATION TYPES

Gen Z
Unexpected flavor combos

Millennials
New textures

Gen X
Unexpected flavor combos

Boomers
Premium/indulgent items



FOUND SOMETHING NEW THROUGH TIKTOK

FOUND SOMETHING NEW IN STORE

PERMISSIBILITY

Confectionery enjoys very high permissibility, with 82% believing it is perfectly fine to occasionally have a piece of chocolate or candy. Agreement is highest among Boomers and closely related to chocolate and candy's unique role in maintaining emotional well-being. Even when money is tight, 67% of consumers agree that chocolate and candy bring joy. Quality and portion size drive greater permissibility. There is growing interest in a number of reformulations, including natural (no artificial) ingredient options, low- or no-sugar options, and organic or vegan options.

THINGS THAT WOULD MAKE IT "FEEL OKAY" TO CONSUME CHOCOLATE AND CANDY MORE OFTEN

36%
If it's premium/ high quality

34%
Smaller portion sizes

34%
When it's gifted

FUTURE OUTLOOK

Weighing market factors and interest in confectionery products, Euromonitor expects continued dollar growth over the next five years. Chocolate sales are expected to rise by $5 billion to reach $33 billion. Non-chocolate candy (including mints) is expected to keep growing its share of the total, reaching $25 billion. Gum sales are expected to exceed $4 billion, for a confectionery total of $62.2 billion.

ALL OUTLET 2030 SALES PROJECTIONS PER EUROMONITOR

CHOCOLATE
$33.3B
+4.9B vs. 2025

NON-CHOCOLATE CANDY
$24.9B
+2.4B vs. 2025

GUM
$4.1B
+49M vs. 2025

$62.2B | +7.3B VS. 2025

Source: Euromonitor | Passport Model December 27, 2025

Euromonitor includes mints in non-chocolate candy

National Confectioners Association
Always A Treat

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STUDY METHODOLOGY

The State of Treating combines proprietary NCA consumer survey findings with syndicated data provided by Circana and Euromonitor. Shopper insights were collected using an online survey conducted in December 2025 among a national sample of 1,585 consumers between the ages of 18 and 75. The survey findings are overlaid with Circana retail measurement and receipt panel data. Future market predictions are provided by Euromonitor. The study was conducted by 210 Analytics. Unless otherwise attributed, data throughout this report are provided by NCA and 210 Analytics.

Questions about the State of Treating? Contact NCA Vice President of Industry Affairs Lynn Wylie at **Lynn.Wylie@CandyUSA.com.**