State of the Candy Industry

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Vice President Client Insights

August 25, 2026

Circana.

Today's Agenda

01

Sweet Shifts

The forces reshaping confection

02

The Next Sweet Thing

Innovation and Growth Opportunities ahead

03

Seasonal Sweetness

Winning the holidays and occasions that matter

04

The Future is Sweet

Key opportunities and actions

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U.S. consumers face mounting economic pressure, driven by global conflict

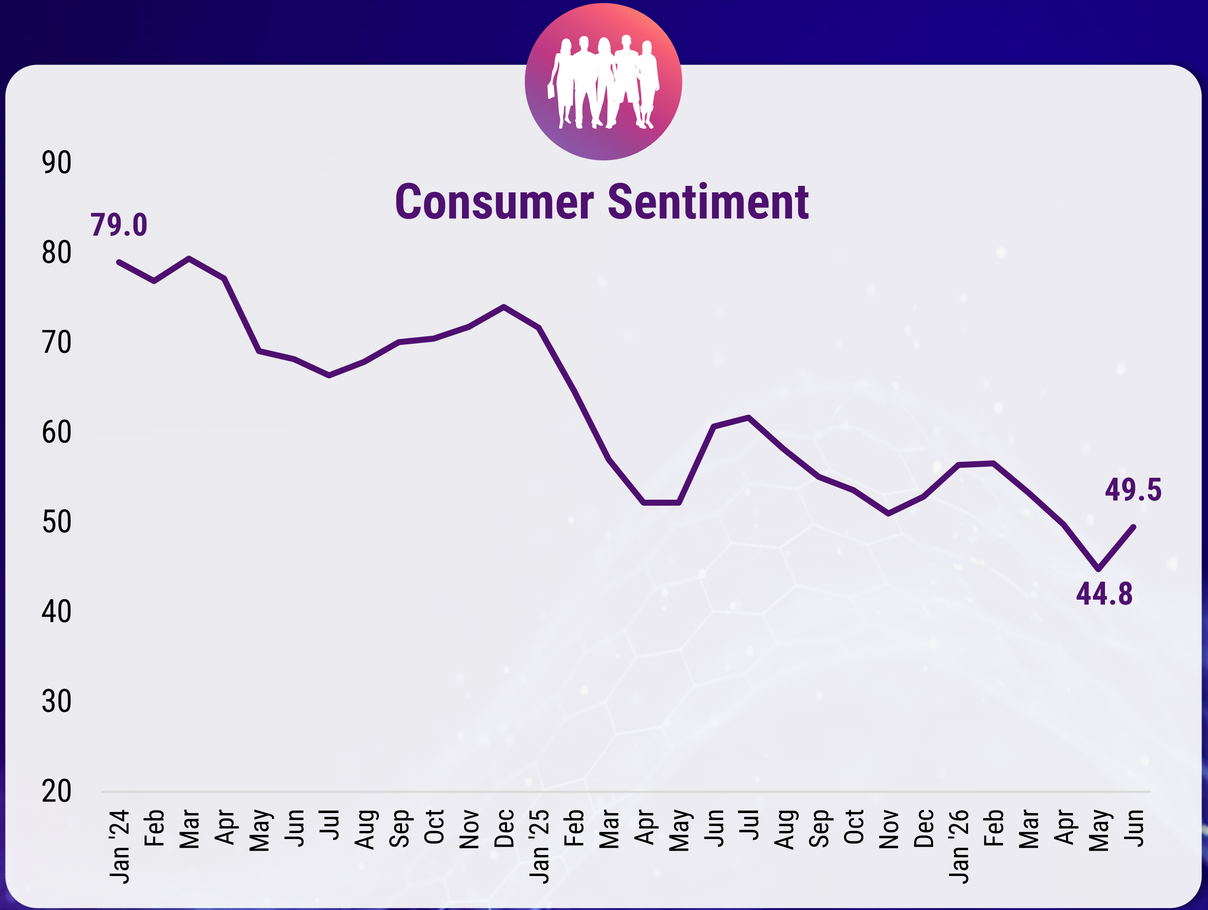
Historically low Consumer Sentiment saw an increase in June as gas prices moderated slightly; however, cost pressures continue to be key point reported by consumers

Unemployment Rate — **4.2%** June 2026 — **+0.1pts** vs. YA

Inflation — **4.2%** May 2026 — **+1.8 pts** vs. YA

Household Debt — **$18.8T** Q4 2025 — **Total +1.0%** vs. Q3 2025

Gas Prices — **$3.96*** June 29, 2026 — **+$0.67** vs. YA



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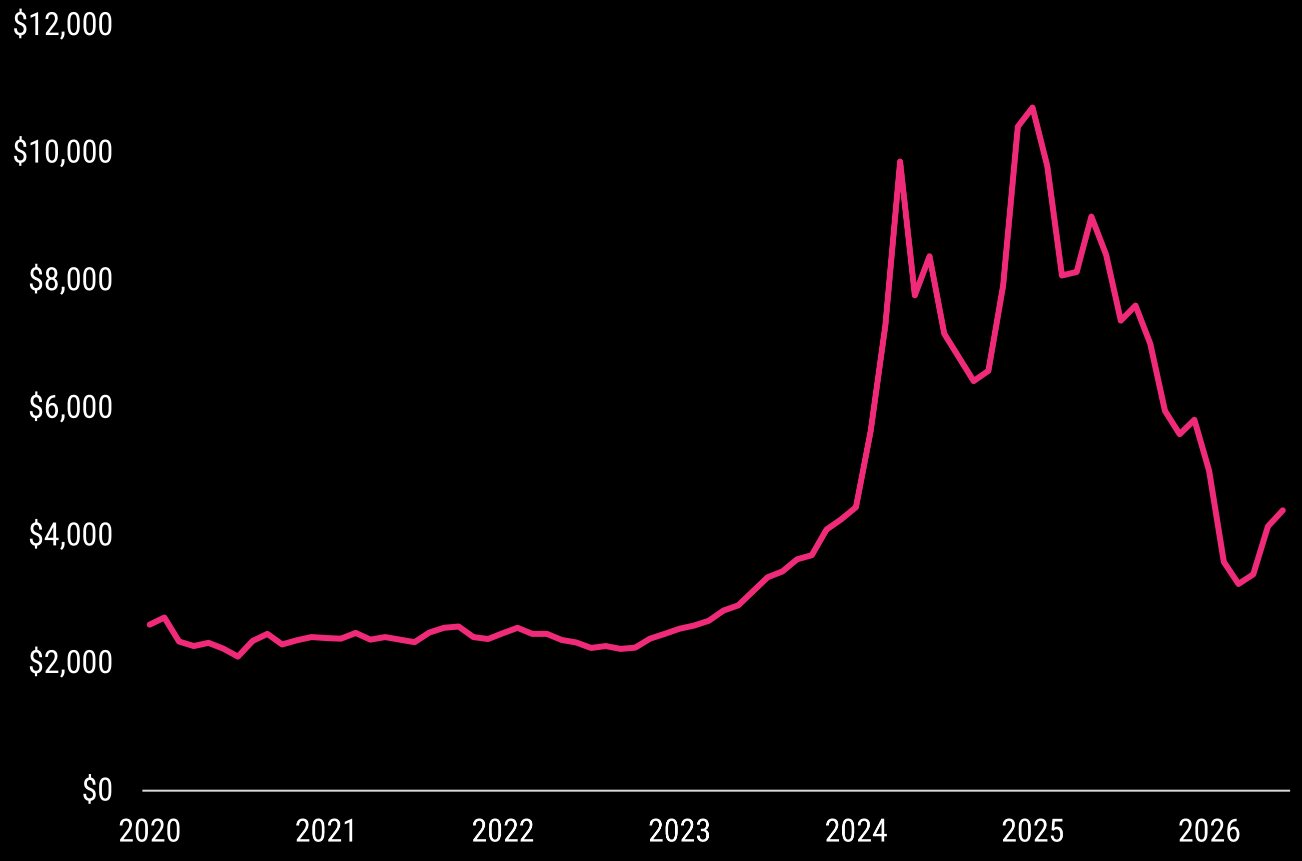
*Sources: U.S. Bureau of Labor Statistics, Civilian Unemployment Rate and Consumer Price Index; Survey of Consumers, University of Michigan; New York Fed Center for Microeconomic Data; U.S. Energy Information Administration * Dollars per gallon U.S. All Grades All Formulations Retail*

Cocoa prices seeing some relief from January high; however, an uptick over the last few months

Reports of conducive weather conditions were the main factor that provided relief in prices from January

Cocoa Price Per Metric Ton



Cocoa Global Price Change

+6% Increase vs month ago

-48% decrease vs year ago

-48% decrease vs 2 years ago

Chocolate Candy Price Per Volume Change

+12.7% increase vs year ago

+20% increase vs 2 years ago

+27% increase vs 3 years ago

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Source: FRED.stlouisfed.org Jan 2020 to June 2025; ICCO.org; Circana POS, MULO+ with C, L52WE 07-12-2026

Candy is among the top F&B aisles

All display dollar growth, aside from Beer/Alcoholic Ciders

					
Total Food & Bev	CSD	Candy	Salty Snacks	Beer/Alc. Cider	Bottled Water
Dollar Sales | % Change					
$856B	$48B	$44B	$43B	$42B	$31B
+2.3%	+4.4%	+5.9%	+1.2%	-1.3%	+2.8%
Unit Sales | % Change					
205B	12B	14B	12B	5B	9B
+0.0%	-0.8%	-2.0%	+1.1%	-1.3%	-0.3%

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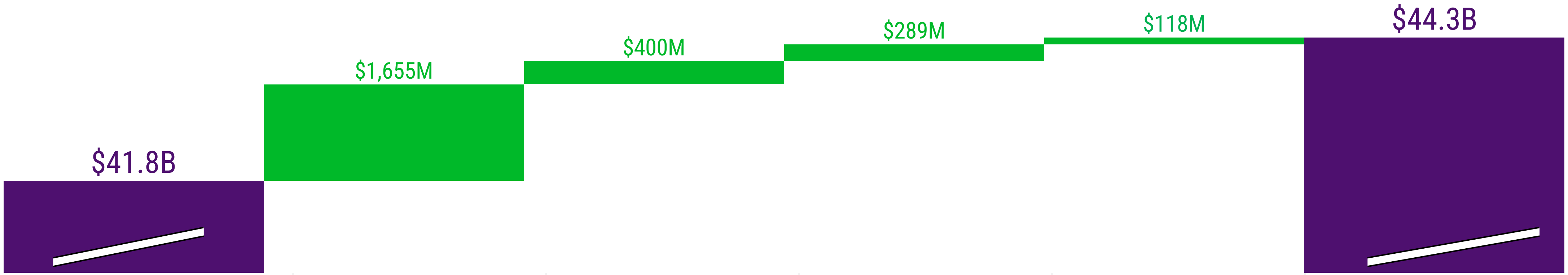
Circana POS Total U.S. MULO+ with C – 52 Weeks Ending 7/12/26

Candy Subcategories Show Broad Dollar Strength Against Weakening Units

Candy by Category Dollar Trends – Growth/Decline

Dollar Change vs. YA



	Chocolate	Non Chocolate	Gum	Breath Fresheners	Candy 2026 $ Sales
Candy 2025 $ Sales					
Dollar Share of Candy	68%	19%	9%	4%	
$ % Chg vs. YA	7.3%	2.9%	7.5%	8.2%	5.9%
Unit % Chg vs. YA	-3.5%	-0.4%	-1.5%	+0.5%	-2.0%
Price per Unit % Chg vs. YA	11.2%	3.3%	9.1%	7.7%	8.0%

Source: Circana TSV,, Total US – MULO+ with C, L52WE 07-12-26

Candy Segment – Dollar Performance

The Chocolate Snack Size segment displays double digit dollar and volume growth. The only other segments showing both dollar and volume growth are Gummy, Sugarless Gum, Hard Candy and Breath Fresheners.

Dollars Volume

Choc Bar >3.50z

+7.0% | -7.8%

Choc Bar <3.50z

+11.4% | -1.3%

Seasonal Candy

+1.7% | -3.2%

Chewy Candy

+1.0% | -2.8%

Gummy

+4.9% | +0.8%

Sugarless Gum

+8.1% | +1.7%

Hard Candy

+1.9% | +0.1%

Chocolate Snack Size

+17.3% | +11.9%

Breath Freshener

+8.5% | +0.5%

Plain Mints

+7.2% | -1.1%

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Circana POS Total U.S. MULO+ with C – 52 Weeks Ending 7/12/26, Ranked by Dollar Sales

Total Candy

More consumers are buying Candy as consumers make repeat purchases.

$47.5B	+6.4%	+9.8%
Candy Sales	L52 weeks	L2 years

Consumer Behavior

% of HHs Buying

99.8

Flat

Avg # of Brands per Buyer

24

-1.1pts

Product Trips per Buyer

50

Flat trips

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Circana Receipt Panel, All Outlet, L52 Weeks ending 07-12-2026

Mid-Small size manufacturers post dollars and units increase within total candy

Top 5 Manufacturers	Other National Manufacturers	Private Label
68% of sales	27% of sales	5% of sales
$ % Chg +5%	$ % Chg +7%	$ % Chg +5%
Unit % Chg -4%	Unit % Chg +2%	Unit % Chg -2%

Circana POS Total U.S. MULO+ with C, Total Candy, Dollar Share – 52 Weeks Ending 7/12/26

Candy Aisle EBT Payment unit declines outpace Total F&B

SNAP restriction waivers are changing how EBT dollars can be spent, driving shifts in beverage purchase behavior across effected states

Total Food & Beverage

L52 Week Dollar and Unit Trends by Payment Type

No EBT Payment

	Dollar Chg vs. YA	Unit Chg vs. YA
	+$41B	+4B
	+6%	+3%

EBT Payment

	Dollar Chg vs. YA	Unit Chg vs. YA
	-$8B	-2B
	-10%	-12%

Candy Aisle

L52 Week Dollar and Unit Trends by Payment Type[1]

No EBT Payment

	Dollar Chg vs. YA	Unit Chg vs. YA
	+$2.8B	-118M
	+6.4%	-0.9%

EBT Payment

	Dollar Chg vs. YA	Unit Chg vs. YA
	-$329M	-170M
	-11%	-16.7%

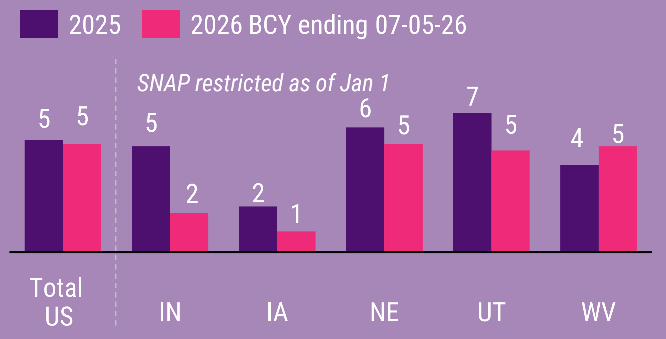
SNAP Restriction Waiver Implementation

State-level restrictions on using SNAP monies toward **soft drinks** in most cases, and additionally candy, **energy drinks, and/or other sugary drinks** in some cases

Implementation began:

- **January:** Indiana, **Iowa, Nebraska**, Utah, **West Virginia**
- **February:** Idaho, Louisiana, Oklahoma
- **April: Colorado,** Florida, Texas
- *Additional states approved for later in 2026+*

Candy Aisle $ Sales % Chg vs. YA²



Impact

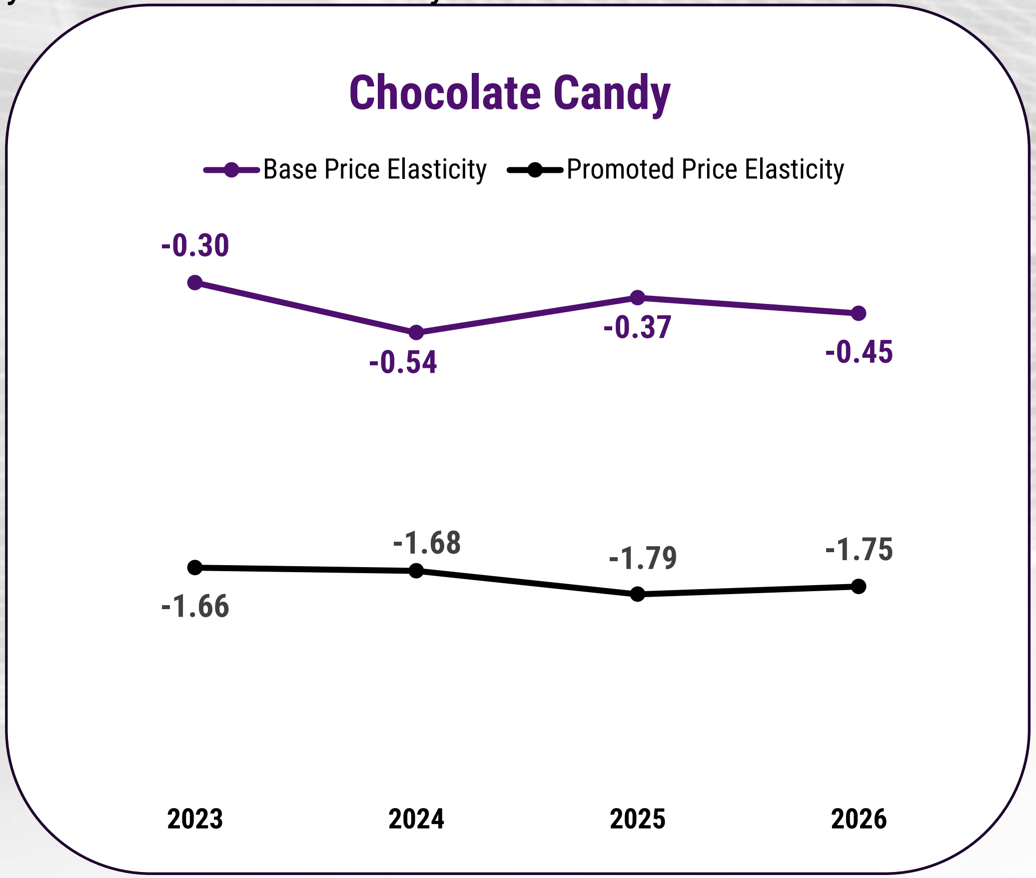
Mixed impact to restricted categories as consumers use personal funds in some cases and switch to other categories in others

Source: 1. Circana Complete Consumer Total U.S. – Omnichannel, L52WE 06-14-26; 2. Circana Syndicated POS, Total US and States – MULO+ with C, YTD 2026 ending 07-05-26; usda.gov

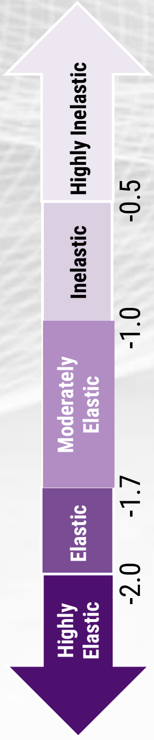
Candy shoppers are becoming more responsive to promotions, increasing the importance of price gap management

Cross-Price elasticity and gaps become increasingly critical when brands closely follow category responses

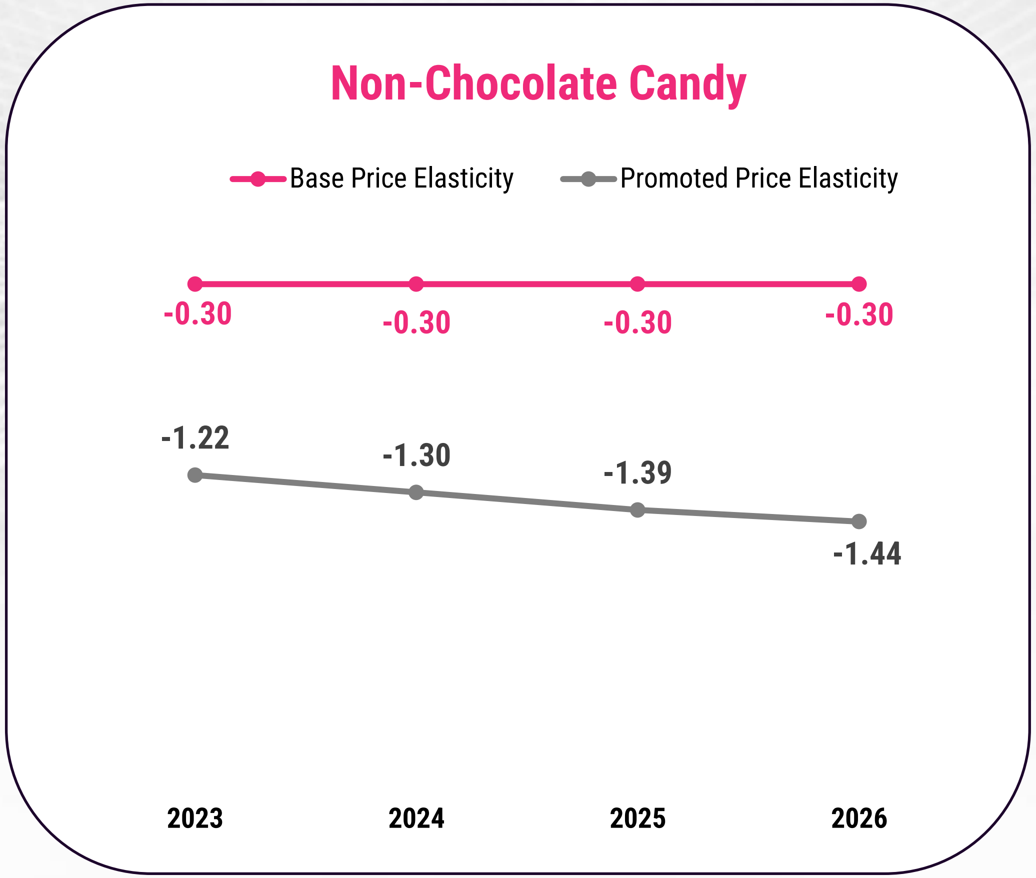
Syndicated Price Sensitivity in Total US – Food



Less Sensitive



More Sensitive



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Source: Circana Syndicated Price & Promo Model, Food, WE 07-23-23, 07-21-24, 07-20-25, 07-19-26
Up arrow indicates movement towards Inelastic; down arrow indicates movement towards Elasticity

Consumers Are Increasingly Choosing Mainstream Confection Options Across Categories

Volume Share Shifts across Price Tiers L52wks

		Chocolate		Non Chocolate		Breath Fresheners		Gum	
	Avg. Price/Volume	$11.35		$7.32		$14.83		$0.55	
		L52	ppt. vs. YA	L52	ppt. vs. YA	L52	ppt. vs. YA	L52	ppt. vs. YA
National Brand	Super Premium	15%	-0.1	6%	-0.2	23%	0.2	1%	-0.1
National Brand	Premium	9%	-0.1	10%	0.0	0%	0.0	0.3%	0.0
National Brand	Mainstream	32%	0.3	52%	0.3	9%	0.8	92%	1.4
National Brand	Value	36%	-0.1	24%	0.3	45%	-0.3	6%	-1.0
	Private Label (all tiers)	9%	0.0	8%	-0.5	24%	-0.7	0.4%	-0.2

Note: Price tiers determined by line extension avg. price per volume vs. corresponding subcategory avg. price per volume. Super Premium > 1.5 avg, Premium > 1.25* avg, Value <0.75* avg based on MULO+ and Cstore. Source: Circana POS L52wks ending 7/12/26. Circana Executive CPG & Foodservice Advisory.*

Across Confection, Growth Is Being Driven by Brands That Stand Out Through Flavor, Texture, and Experience

Mainstream brands leading growth across confections

Chocolate

Kinder-chocolate Candy Box/Bag/Bar > 3.5oz

Non Chocolate

Mount Franklin Bubs-Gummy Candy

Breath Fresheners

Mentos-Plain Mints

Gum

Wrigleys-Sugarless Gum

In Candy, consumers favor products that exclude negative health attributes

Top Growing Health and Wellness Claims, Ranked by $ Growth

	Candy	Chocolate Candy	Non-Chocolate Candy	Gum
1	No/Low Sugar	No/Low Sugar	No/Low Sugar	No/Low Sugar
2	Artificial Sweetener	Kosher	Vegan	Vegan
3	Vegan	Vegan	Natural Sweetener	100% Natural
4	Natural Sweetener	Natural Sweetener	Gluten Free	Gluten Free
5	Gluten Free	Gluten Free	No/Low Fat	No/No Added Dairy

Source: Circana POS, Total US – MULO+, L52WE 06-14-26

In the candy category, there is a structural shift toward E-comm, with broad-based share erosion across B&M channels.

Dollar Share Pt Change vs YA	Grocery B&M	Mass B&M	Convenience B&M	Club B&M	E-Comm	Dollar B&M	Drug B&M
Total Food & Bev	-1.2 pts	-0.7 pts	0.0 pts	+0.2 pts	+1.7 pts	+0.1 pts	-0.1 pts
Candy	**0.0 pts**	**-0.4 pts**	**-0.2 pts**	**-0.1 pts**	**+1.4 pts**	**0.0 pts**	**-0.3 pts**
Chocolate	-0.1pts	-1.2 pts	+0.2 pts	0.0 pts	+1.2 pts	+0.1 pts	-0.3 pts
Non Chocolate	-0.1pts	-0.2 pts	-0.9 pts	-0.4 pts	+1.7 pts	+0.2 pts	-0.3 pts
Gum	-0.2 pts	-0.3 pts	0.0 pts	-0.4 pts	+1.2 pts	0.0 pts	-0.2pts
Breath Fresheners	-0.3 pts	-0.4 pts	+0.1 pts	-0.5 pts	+1.8 pts	-0.5 pts	-0.1 pts

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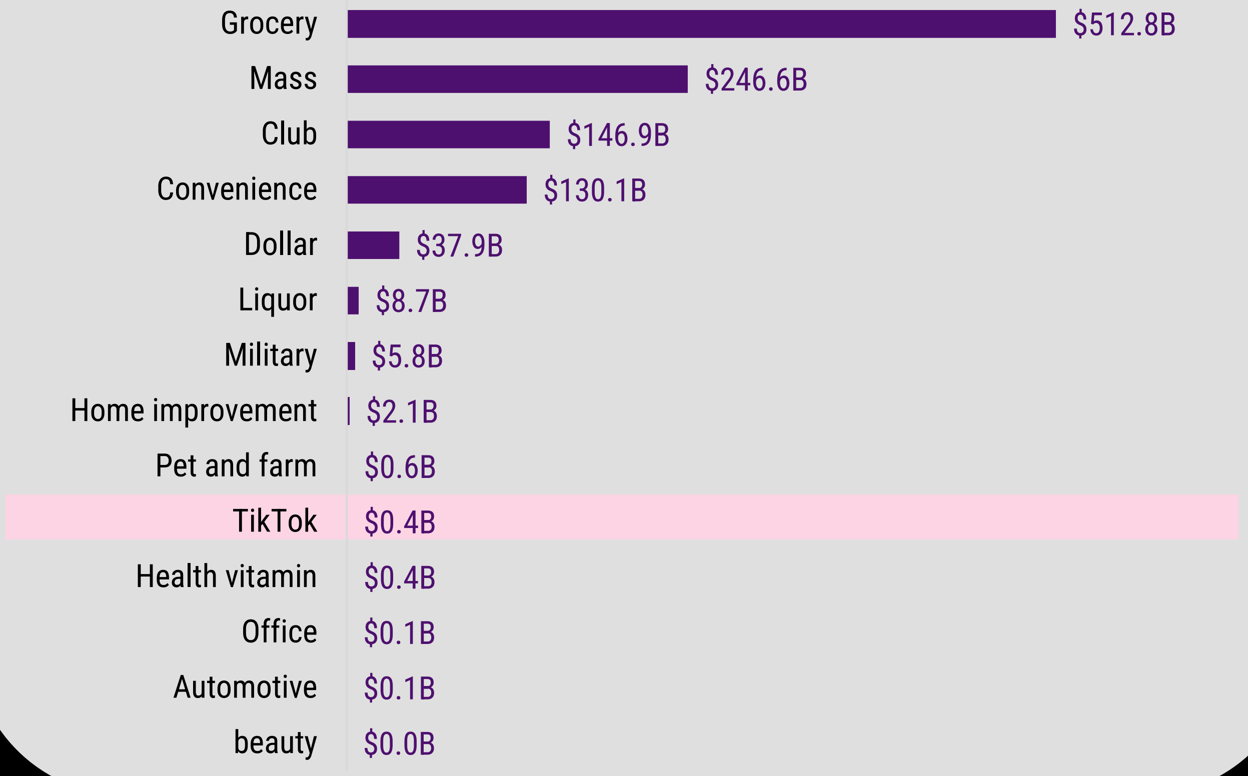
Source: Circana Integrated Fresh Panel, Club , Dollar, Drug, Mass, Food, Convenience
Circana Integrated Fresh POS Splits, Total US – MULO+ Brick & Mortar, Total US – MULO+ Ecommerce, L52WE 07-12-26

Food & Beverage Is Becoming a Relevant Category on TikTok Shop, with Candy Leading Snack Sales

Top Total Retail Channels

Dollar Sales – LATEST 52wks Ending 07-12-26



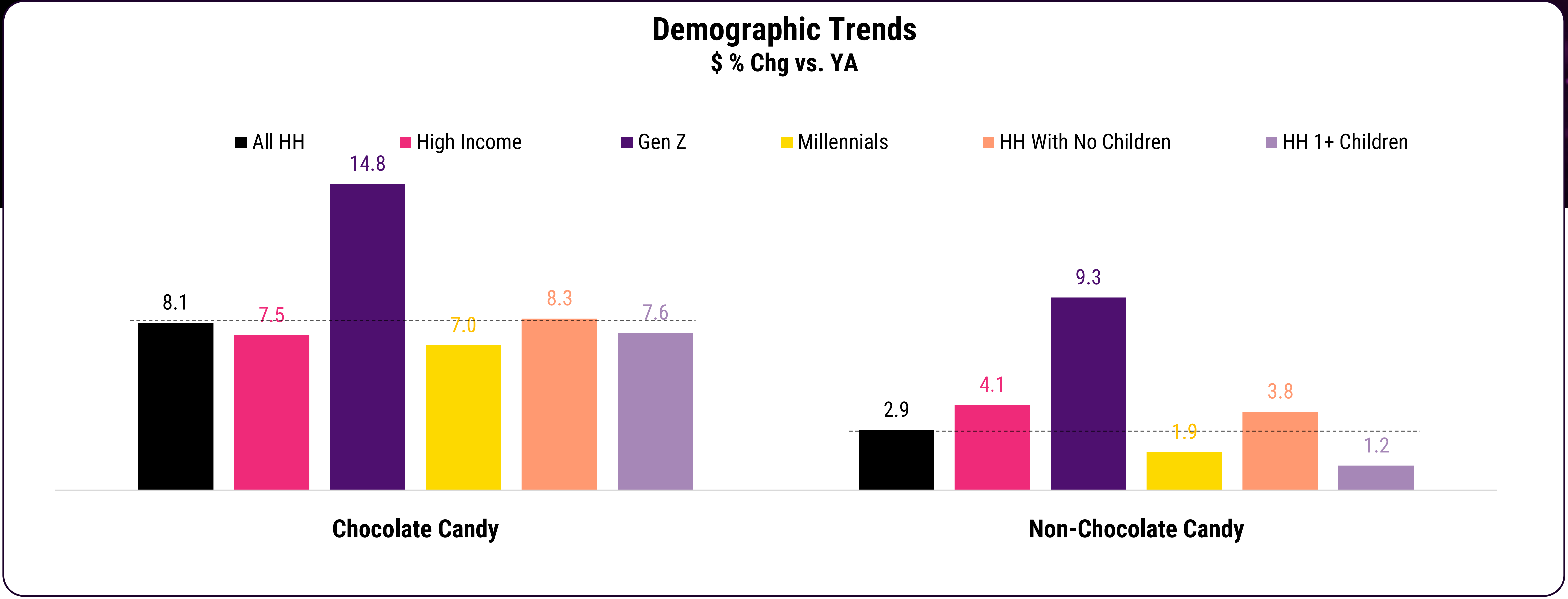
Top TikTok Shop Categories

Dollar Sales from TikTok Shop*

Snacks	$192M
NON- CHOCOLATE CANDY	$58,039,960
DRIED SNACKS	$29,331,631
BARS	$24,709,609
CRISPS & PUFFED SNACKS	$23,787,261
CHEWING & BUBBLE GUM	$12,794,170
BISCUITS, COOKIES & WAFERS	$9,636,838
CHOCOLATE & CHOCOLATE SNACKS	$9,547,647

*Sources: Circana Syndicated Complete Wallet model, last 52 weeks ending 07-12-26; *Circana, Social Commerce, BCY ending 07-12-26; (TikTok Shop)*

Gen Z significantly over-indexes versus total category growth across both chocolate and non-chocolate candy



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Source: Circana Receipt Panel, Omnichannel, L52WE 07-12-26

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New product pacesetters criteria

2025 Pacesetters reporting is based on MULO+ data.

- New or extended brand
- Existing brand in a new category
- 25% distribution starts the clock on year 1
- New products completing first year in 2025
- Top 100 brand launches in food & beverage and non-food CPG

NEW PRODUCT PACESETTERS

Top 10 Food New Product Pacesetters make everyday eating more fun and functional

#5

Fruit Riot Sour Candy Fruit
Beyond Better Foods LLC
Frozen Fruit
Launch Year Sales
$74.2M

L52 Week Trends
+71.1
ACV Change
+86%
$ Chg vs. YA

#10

King's Hawaiian Soft Pretzel Bites
Kings Hawaiian Bakery West inc
Salty Snacks
Launch Year Sales
$73.4M

L52 Week Trends
-7.5
ACV Change
-13%
$ Chg vs. YA

#11

Perdue Air Fryer Ready™ Crispy Wings
Perdue Farms inc
Processed Poultry
Launch Year Sales
$70.1M

L52 Week Trends
+9.4
ACV Change
+24%
$ Chg vs. YA

#12

Cheerios Protein
General Mills inc
Cold Cereal
Launch Year Sales
$58.2M

L52 Week Trends
+14.6
ACV Change
+129%
$ Chg vs. YA

#14

SKITTLES POP'd
Mars inc
Non-Chocolate Candy
Launch Year Sales
$52.7M

L52 Week Trends
+25.6
ACV Change
+48%
$ Chg vs. YA

#18

GOLDEN WEST HERSHEY&REESE
Golden West Food grp
Frozen Fruit
Launch Year Sales
$45.2M

L52 Week Trends
+0.3
ACV Change
-20%
$ Chg vs. YA

#19

Belgian Boys Bite
Belgian Boys
Refrigerated meals
Launch Year Sales
$44.6M

L52 Week Trends
+40.1
ACV Change
+12%
$ Chg vs. YA

#22

Pringles Mingles
Kellanova
Salty Snacks
Launch Year Sales
$38.8M

L52 Week Trends
-1.2
ACV Change
-26%
$ Chg vs. YA

#23

Kraft Signature Shreds
Beyond Better Foods LLC
Lactalis Heritage Dairy
Launch Year Sales
$37.7M

L52 Week Trends
-16.2
ACV Change
-11%
$ Chg vs. YA

#25

Kodiak Protein Oat Granola
Kodiak Cakes LLC
Cold Cereal
Launch Year Sales
$36.5M

L52 Week Trends
+23.3
ACV Change
+255%
$ Chg vs. YA

Source: Circana 2025 New Product Pacesetters; Circana POS, Total US - MULO+ with C, ACV=ACV Weighted Distribution, L52WE 06-14-26

Rising Stars 2026 | Food & Beverage

Convenience and beverage refreshment are key themes for trending new products.

Sanpellegrino CIAO!
Nestlé S.A.
Flavored Sparking Water

Dr Pepper Blackberry
Keurig Dr Pepper
Carbonated Beverages

Surfside Canned Cocktail
Stateside Brands
Premixed Cocktails

Bloom Pop™
Nutrabolt
Carbonated Beverages

LMNT Sparkling Electrolyte Drink
Drink LMNT Inc
Drink Mixes

Island Way Sorbets
Island Way Sorbet LLC
Frozen Novelties

Peelerz
Amos Sweets Co LTD
Non-Chocolate Candy

Yoggies
Cibo Vita Inc
Other Snacks

Amara Smoothie Melts
Patafoods LLC
Baby Food

REESE'S OREO® Cup Peanut Butter Cups
The Hershey Co
Chocolate Candy

Source: Circana Total Store View, Total U.S. MULO+, Custom 13 Quad-Week Time Periods Based on NPP 25% ACV Benchmark

Confections sees reimagined brands achieving success in New Product Pacesetters over the years

NPP Food & Beverage Ranking

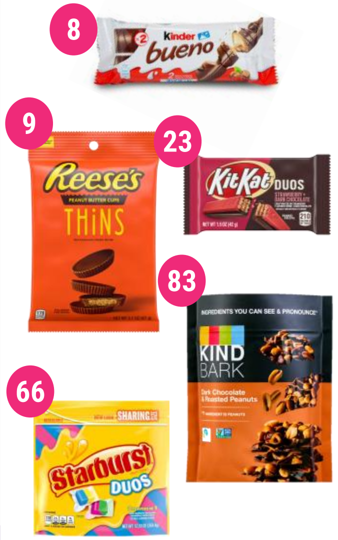
2018

Reimagined classics with familiar flavors and formats

2019

Mix of classic favorites with innovative twists

2020

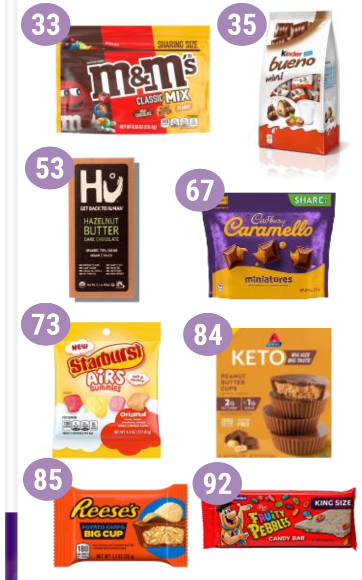


Thinning down and doubling up on flavor

2021

Nostalgia meets innovation with new ideas of old classics

2022

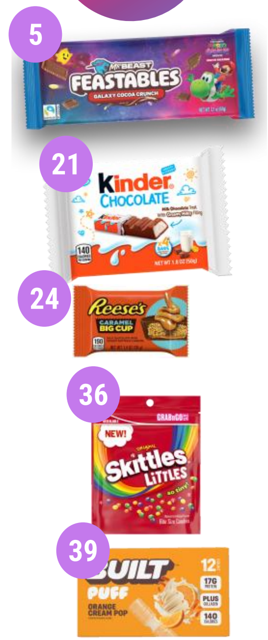


Satisfying cravings with different varieties

2023

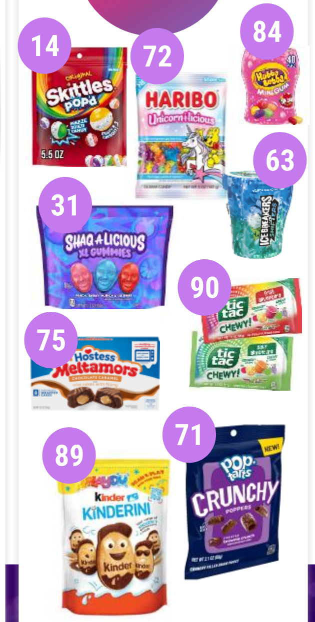
Non-traditional brands become powerful forces

2024



Indulgent and protein needs

2025



Flavor-forward indulgent products designed for treat and enjoyment occasions

Source: Circana NPP 2018-2025

Candy is evolving across formats and expanding into new categories through continuous innovation

Trolli Gummi Pop's
Launched April 2025, Trolli brought its signature sour gummy experience to the frozen aisle with a first-of-its-kind frozen treat, quickly becoming a top-selling new frozen handheld product

Baby Ruth, Butterfinger, and 100 Grand candy ice cream bars
Launched nationwide April 2026, extending three iconic candy brands into the frozen aisle. The bars recreate the signature textures and flavors of the original candies in an ice cream format.

Reese's pieces with chocolate cookie biscuit
Launched July 2026, is the first U.S. Reese's Pieces innovation in 10 years. The new offering blends candy and cookie formats to deliver a more textured, shareable snacking experience.

#18
2025
F&B NPP

Hershey's Chocolate covered frozen fruit line
Launched December 2023, the line brings familiar candy and chocolate brands into the freezer aisle while also blending indulgent treats with fruit-based snacking. Offers consumers a new way to enjoy Hershey's flavors.

Source: Desk Work

2026 Innovation Winners Highlight the Power of Flavor Exploration, Format Disruption, and Premium Indulgence

Powerhouse Candy
WARHEADS Loud Mouth Bites
CandyRific

Gummy Candy
Squashies Sours
Smarties

Novelty/Licensed
Mashups Candy Salad Kit **1UP Candy**

Gourmet/Premium Confections
Frozen Bananas in Greek Yogurt w/ White Chocolate + Granola
Tru Fru

Meat Snacks
Cinnabon Bakery Inspired Flavored Bacon Jerky
Wicked Cutz

Powerhouse Snack
Dot's Snack Mix
The Hershey Company

Gum & Mints
Bubblicious Gummy Gum
Perfetti Van Melle

Trailblazer Candy
Mochi Gummies
Dark Chocolate Covered Cherry
Issei

Chocolate
Alli & Rose Strawberry Moochies
CAL Marketing

Sweet Snacks
Nutella Ice Cream Cones
Ferrero North America

Trailblazer Snack
Raspberry Rose Popcorn
Belle's Gourmet Popcorn

Salty Snacks
Cholula Flavored Tortilla Chips
Xochitl, Inc.

Non-Chocolate Candy
Sour Tiniez
Rotten

Seasonal
Brach's Crunchy Chewy Jelly Beans
Ferrara

Baked Goods
Strawberry Milkshake Cookie
The Graceful Cookie

Savory Snacks
Everything Bagel Pretzels
Promise Confections
Edward Marc Brands

Candy
Frozen Novelties
Baked Goods
Snacks

Source: sweetsandsnacks.com/The 2026 Most Innovative New Product Awards

The “how” of innovation matters as much as the “what”

Traditional launch models:

- Broad distribution first
- Heavy upfront media
- Long awareness curves

Today’s model looks very different:

Ecommerce changes the rules

- Ecommerce enables **low-risk testing, rapid iteration, and faster learnings**, allowing brands to validate demand before full-scale rollout
- Launch success is increasingly driven by **search, ratings, reviews, and algorithmic discovery**, not just shelf presence

Social commerce accelerates discovery

- Platforms like TikTok, Instagram, and YouTube Shorts turn **content into commerce**, collapsing the funnel from awareness to purchase
- Successful new products are often **discovered socially, validated online, then scaled into physical retail,** reversing the old path

Innovation today is not a moment—it’s a system. Launch is no longer the finish line; it’s the learning engine.

Source: Desk research

Behave candy shows how TikTok Shop saved a brand on the brink of bankruptcy

$1.01M
L52 W Retail $ Sales
+910% $ Sales chg vs. YA
+766% Unit Sales chg vs. YA

Brand Foundation

- Founded in **2020** by **Mayssa Chehata**
- Created a **low-sugar** gummy candy brand with **clean ingredients** inspired by growing up with a diabetic father
- Sold primarily through **DTC**, specialty retailers like **Erewhon, Urban Outfitters,** and **WH Smith**

TikTok Shop Turnaround

- **Summer 2024**, Behave had only 60 days of cash remaining and was nearing **bankruptcy**
- Chehata shifted her entire focus to **TikTok**, posting **4-5 videos** per day
- After **two weeks**, the first **viral TikTok** generated as many sales as the prior month
- Launch of Super Sour Skulls **sold out in 3 days**
- TikTok Shop quickly grew into a **six-figure monthly** revenue channel

$90K
L52 W TikTok Shop $ Sales

Founder:
Mayssa Chehata

Retail Expansion

- Behave used TikTok as both a **sales** and **customer feedback engine**, reading over **10,000** customer comments
- By **spring 2025**, Target's candy buyer responded to previous outreach after seeing the brand's momentum
- Secured **nationwide Target distribution** in **2,000** stores beginning **April 2026**
- Closed a **seed funding** round to support future **growth** and **expansion**

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Source: Circana Social Commerce; L52WE 07-12-26; Circana Syndicated POS, Total US- MULO+, L52WE 07-12-26 https://www.eatbehave.com/

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Winning the Biggest Candy Moments Matters

More Than 70% of Candy Sales Come from Five Seasonal Events



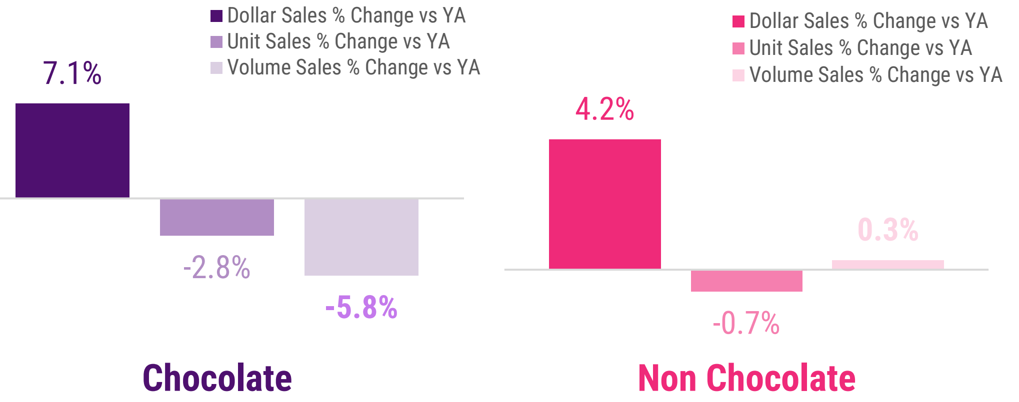


	Halloween	Winter Holiday	Valentine’s	Easter	June National Candy Month
Total Candy	$7.8B	$8.0B	$5.9B	$6.6B	$2.9B
Dollar Sales % Change	+6.1%	+7.2%	+6.3%	+4.7%	+5.7%
Unit Sales % Change	-1.8%	-1.5%	-1.9%	-2.7%	-1.3%

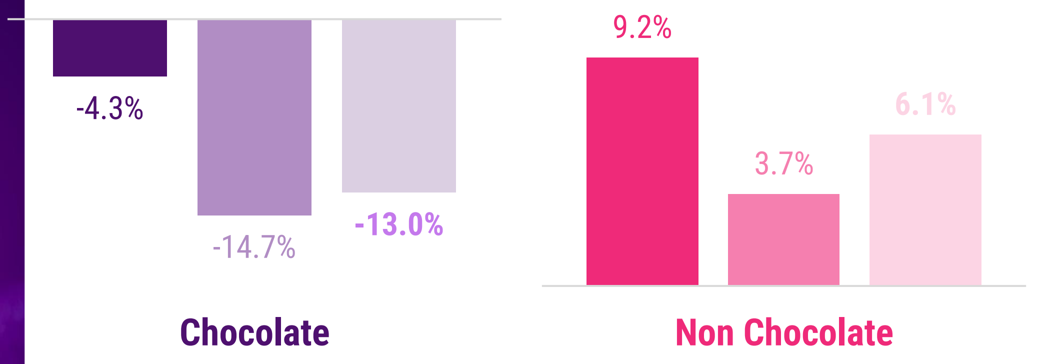
Circana POS, MULO+ with C, Halloween = 8 Weeks ending 11-02-2025 vs 8 Weeks ending 11-03-2024, Winter Holiday = 8 Weeks ending 12-28-2025 vs 8 Weeks ending 12-29-2024, Valentine’s Day = 7 Weeks ending 02-15-2026 vs 7 Weeks ending 02-16-2025, Easter = 7 Weeks ending 04-05-2026 vs 9 Weeks ending 04-06-2025, June 2026 vs 2025

Halloween 2025: Non-Chocolate Continues to Gain Share While Chocolate Remains the Majority of Seasonal Spend

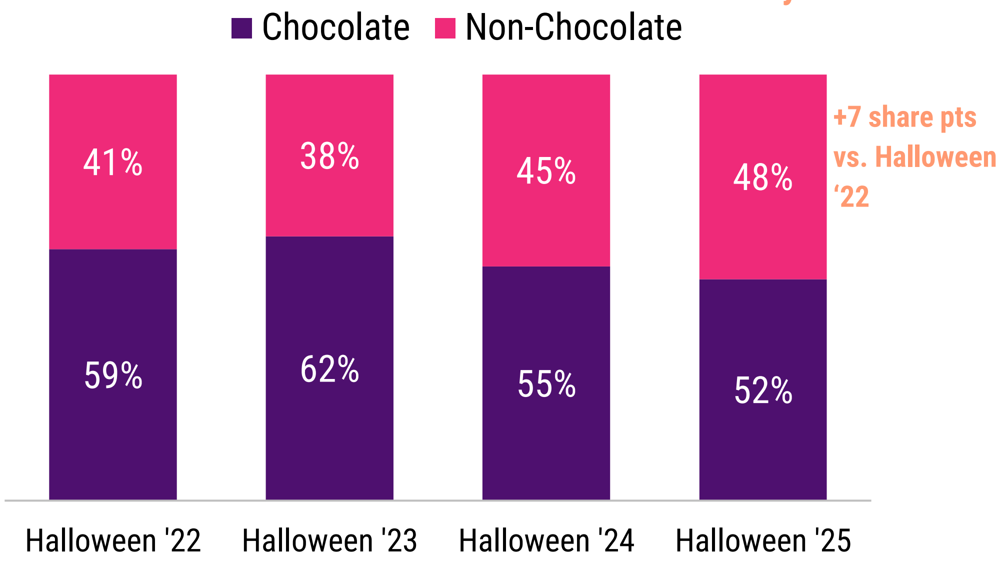
2025 Halloween Category Performance



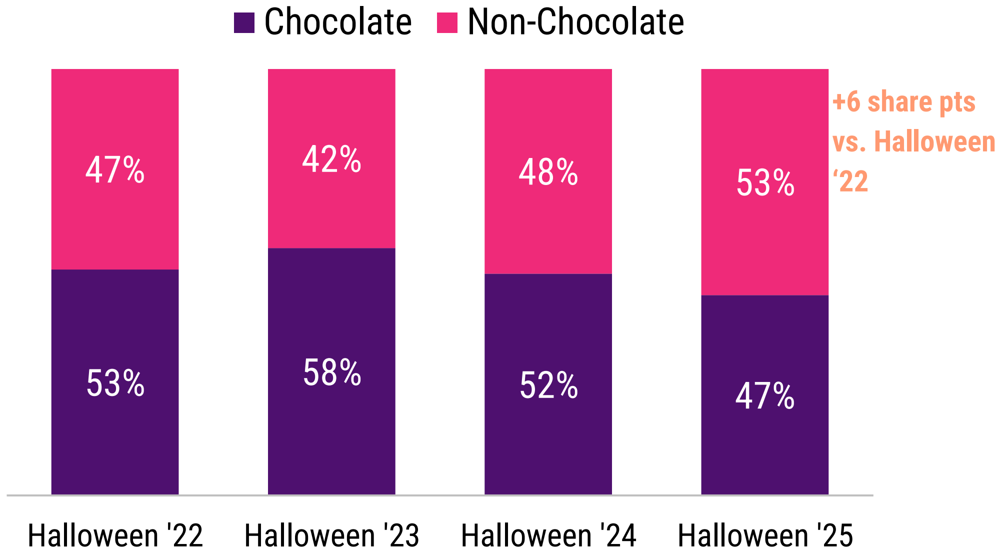
2025 Halloween Seasonal Item Performance



Dollar Share of Seasonal Halloween Candy



Volume Share of Seasonal Halloween Candy



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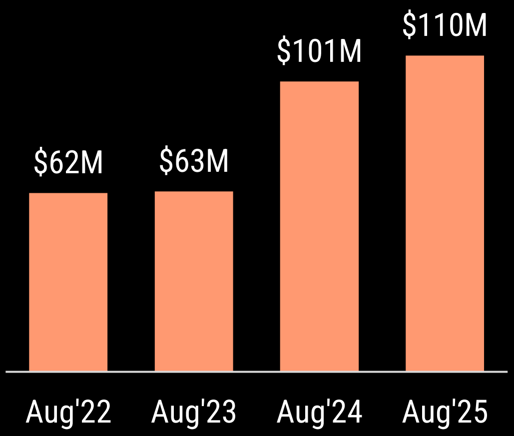
Circana POS, MULO+ with C, 8 Weeks ending 11-02-2025, 8 weeks ending 11-03-2024, 8 weeks ending 11-05-2023, 8 weeks ending 11-06-2022

Halloween's time frame is expanding with introductions of Summerween and Hallowmas

Mars Wrigley leads the charge in creating more occasions for Halloween candy

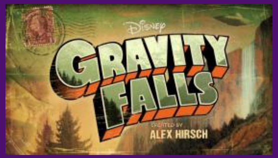
Summerween

Seasonal Halloween Candy Dollar Sales ($M)



Mars announced new lineup of Halloween candy in Summer 2025 alongside Halloween candy hitting shelves earlier than ever

Walmart released "Summer Frights" sections in select stores



Summerween originates from the Disney animate series, '*Gravity Falls*'. The fictional holiday has made it into the real world with manufactures and retailers buying into the expanded time for seasonal Halloween Candy

Hallowmas

New TWIX Goulish Green and TWIX Snowman featured in the Hallowmas pack

"We're excited to have fans help us give Hallowmas a 'moment' celebrating both of their favorite holidays at once, which only TWIX, the brand of two, can deliver on."

-Tim LeBel, President of Sales Mars Wrigley North America

Twix launched **Hallowmas**, a celebration that merges Halloween and the winter holiday season. Alongside the release of the Hallowmas pack, fans could enter a sweepstakes tow in TWIX candy for Halloween and $20,000 in cash for the winter holidays

Sources: Brand Websites; Mars.com; Circana POS, MULO+ with C

Halloween candy opportunities exist with consumers currently purchasing chocolate and non-chocolate

93%

of consumers purchase Chocolate and Non-Chocolate candy during the 8 week Halloween season; **40% of those consumers are not purchasing Halloween candy**

up to **$1.1B**

opportunity if we get these households buying Chocolate and Non-Chocolate candy to purchase Halloween items

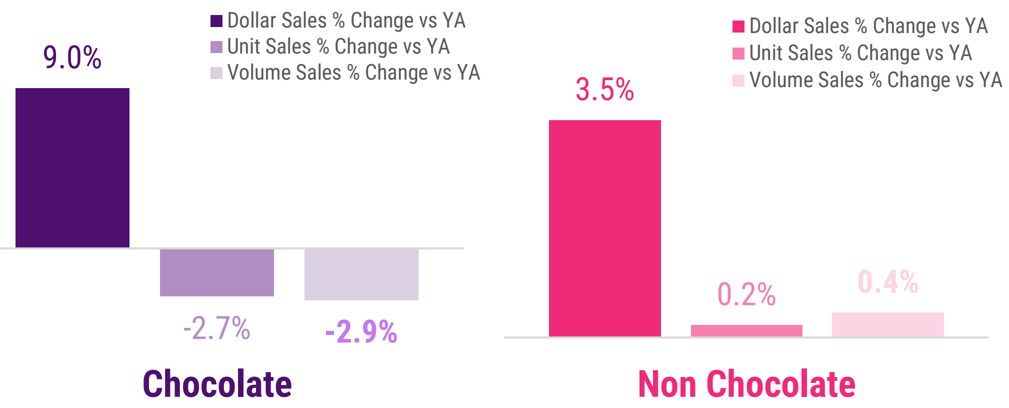
51M

potential households to convert

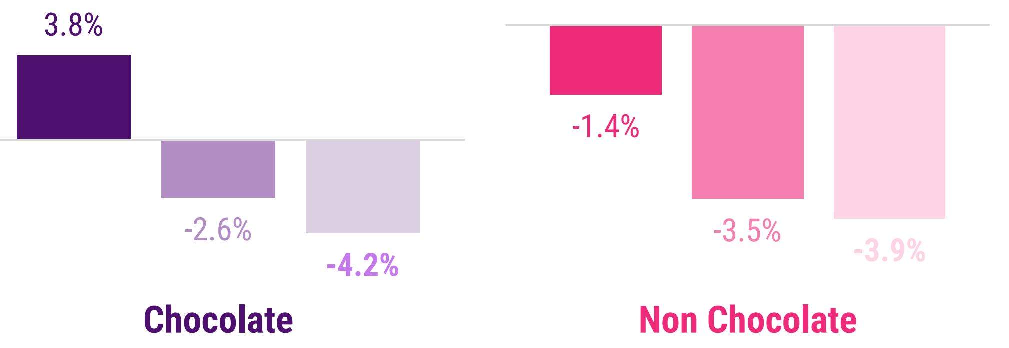
Source: Circana Receipt Panel, Omnichannel, Total Halloween Candy, 8 W/E 11/02/25

Christmas 2025: Chocolate Maintains Category Leadership, with Non-Chocolate gaining little share.

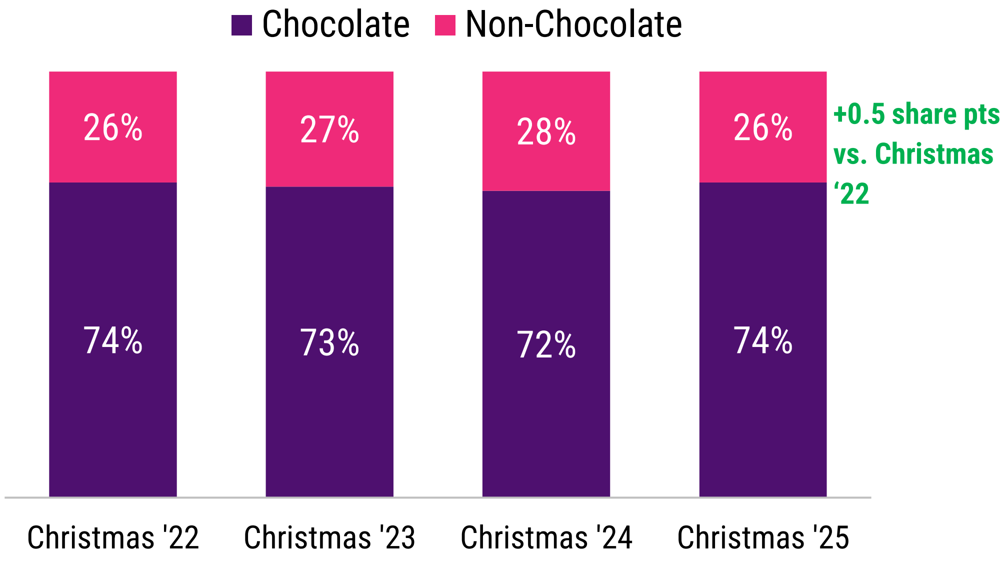
2025 Christmas Category Performance



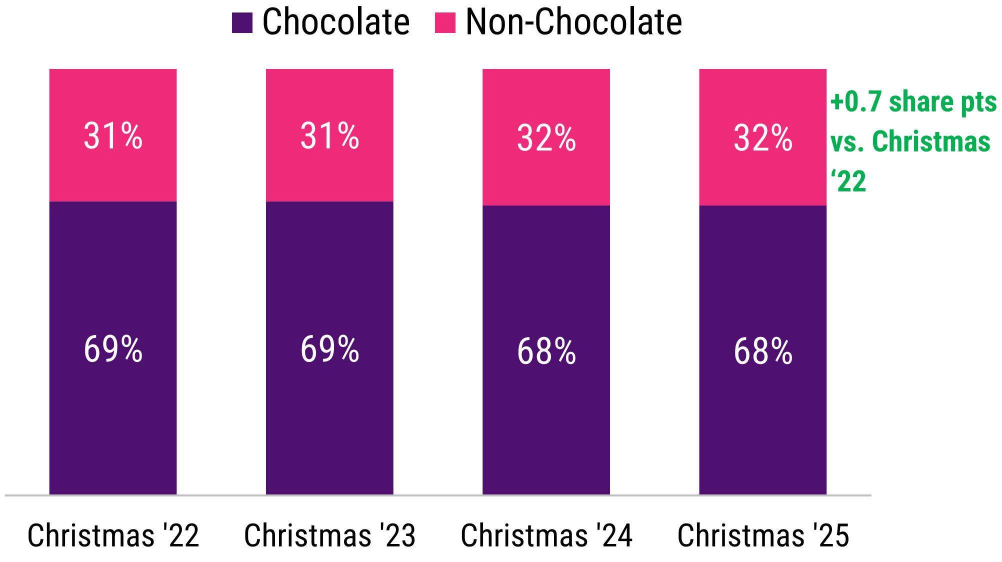
2025 Christmas Seasonal Item Performance



Dollar Share of Seasonal Christmas Candy



Volume Share of Seasonal Christmas Candy



Circana POS, MULO+ with C, 8 Weeks ending 12-28-2025, 8 weeks ending 12-29-2025, 8 weeks ending 12-31-2023, 8 weeks ending 01-01-2023

Christmas sales on TikTok shop were powered by gift packs and viral trends

AMOS Christmas Candy Gift Set | Peelz Gummies & Music Lollipop | Fun Holiday Treats for Kids | Sweet Stocking Stuffer Gift Idea

Sold by Amos Sweets

4★ (152) | 3.2K sold

- Amos Peelerz #1 item on TikTok Shop during Christmas 2025

Cynthia Beaumont | cynthiabeaumont

23 Following **458.1K** Followers **6.7M** Likes

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Sources: Tiktok

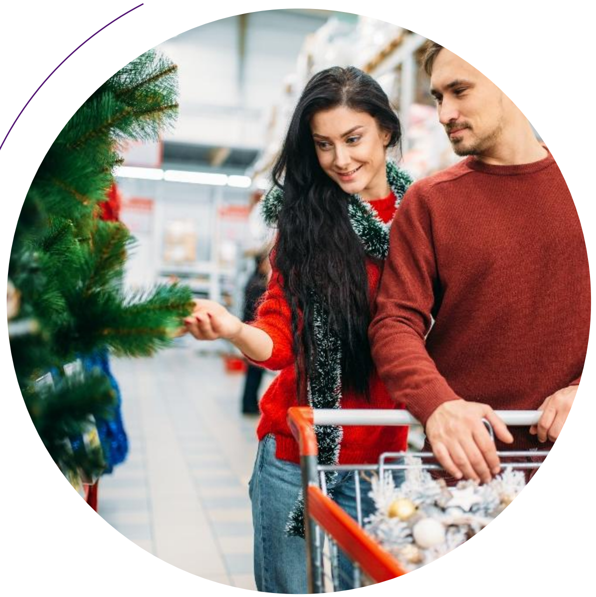
Nearly two thirds (65%) of winter seasonal candy consumers make a repeat purchase

23%

of winter holiday consumers exclusively purchase chocolate

9%

of winter holiday consumers exclusively purchase non-chocolate



$725M

Converting these exclusive buyers offers over a $725M opportunity

Circana Receipt Panel, Omnichannel, Total Holiday Candy, 8 W/E 12/28/25

Converting Halloween Candy buyers can help spur growth

15.5%

Seasonal Halloween candy buyers did not purchase any Winter Holiday candy items, translating to 19M HH.

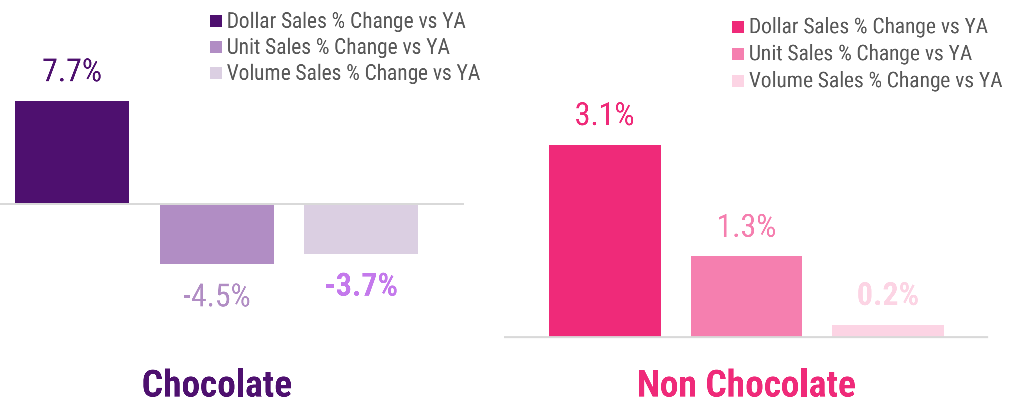
$285M

Influencing these Halloween Candy buyers to purchase Winter Holiday Candy represents a $285M opportunity!

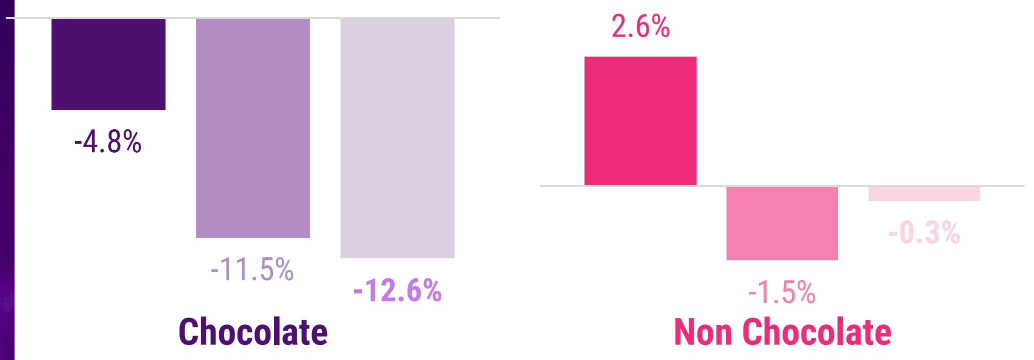
Source: Circana Receipt Panel, Omnichannel, Total Holiday Candy, 8 W/E 12/28/25

Love Is Spreading Beyond Chocolate: Non-Chocolate Continues to Gain Ground at Valentine's

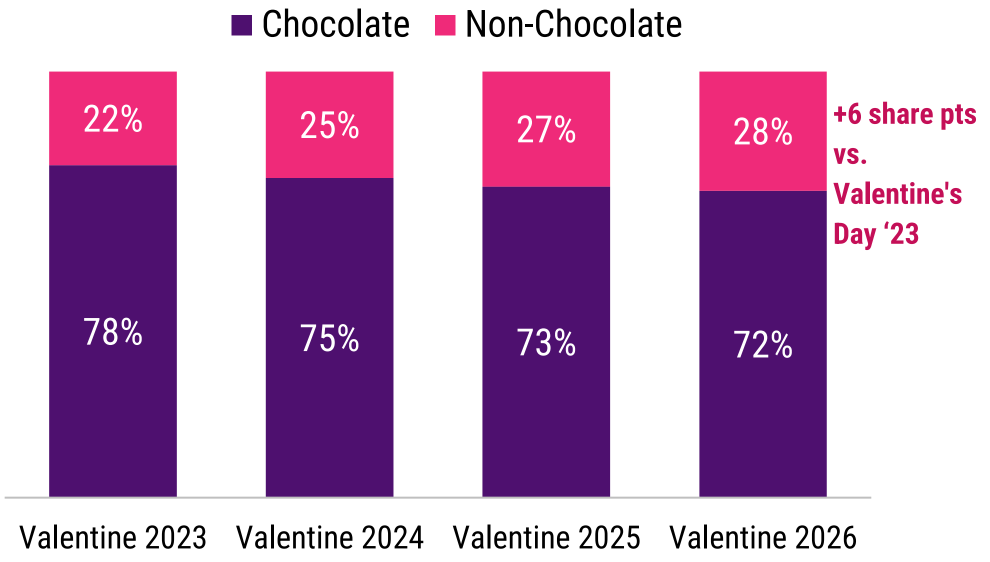
2026 Valentine Category Performance



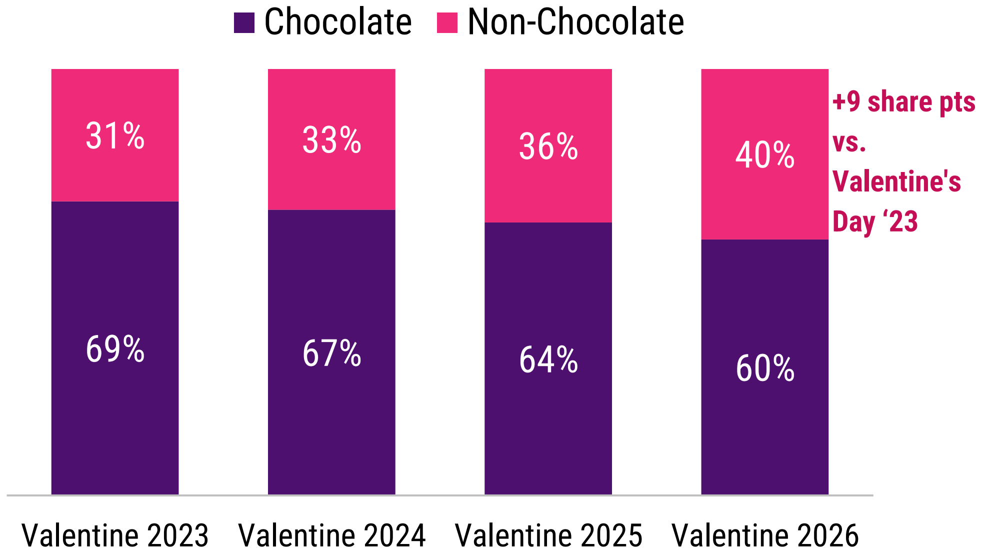
2026 Valentine Seasonal Item Performance



Dollar Share of Seasonal Valentine's Day Candy



Volume Share of Seasonal Valentine's Day Candy



Circana POS, MULO+ with C, 7 Weeks ending 02-15-2026, 7 weeks ending 02-16-2025, 7 weeks ending 02-18-2024, 7 weeks ending 02-19-2023

With Valentine’s falling on a weekend Heart Boxes struggled

$259M
Valentine Hearts
$ +2.7%
Lbs -4.3%

$359M
Heart Boxes
$-7.4%
Lbs. -14.7%

$97M
Classroom Exchange
$ +2.4%
Lbs -2.1%

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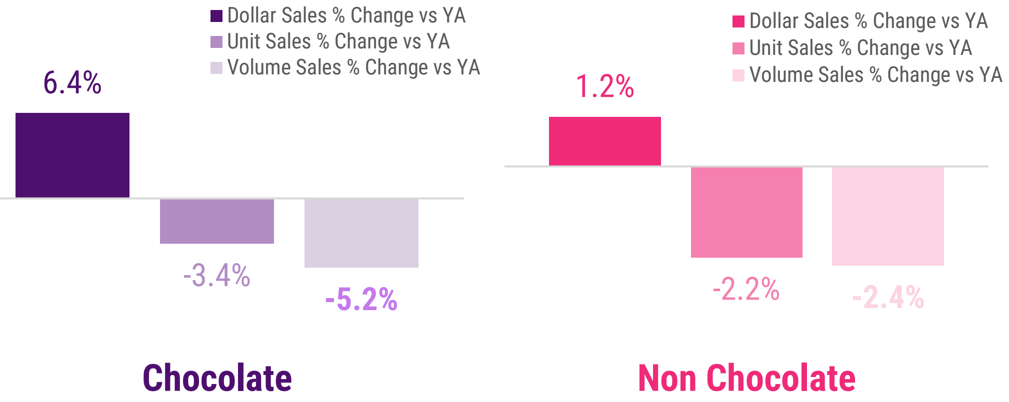
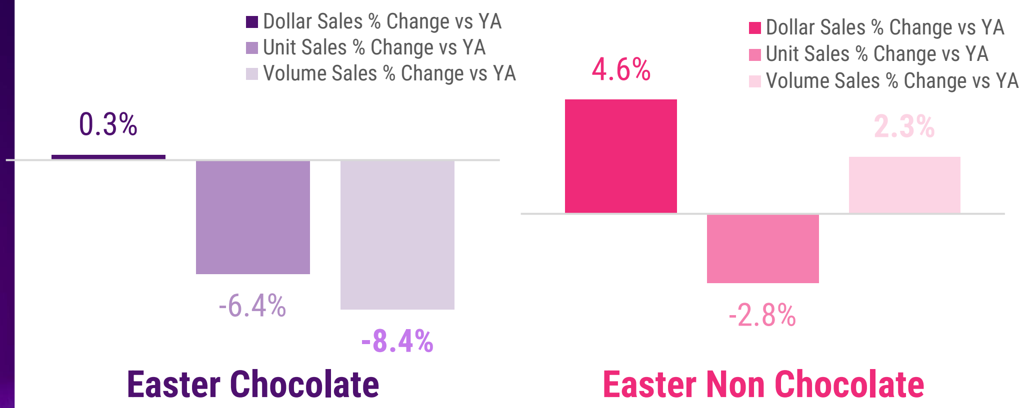
Source: Circana POS, MULO+ with C, 7 Weeks Ending 2-15-2026

Easter 2026: Non-Chocolate Continues to Gain Easter Share, While Chocolate Remains the Majority of Seasonal Candy Sales

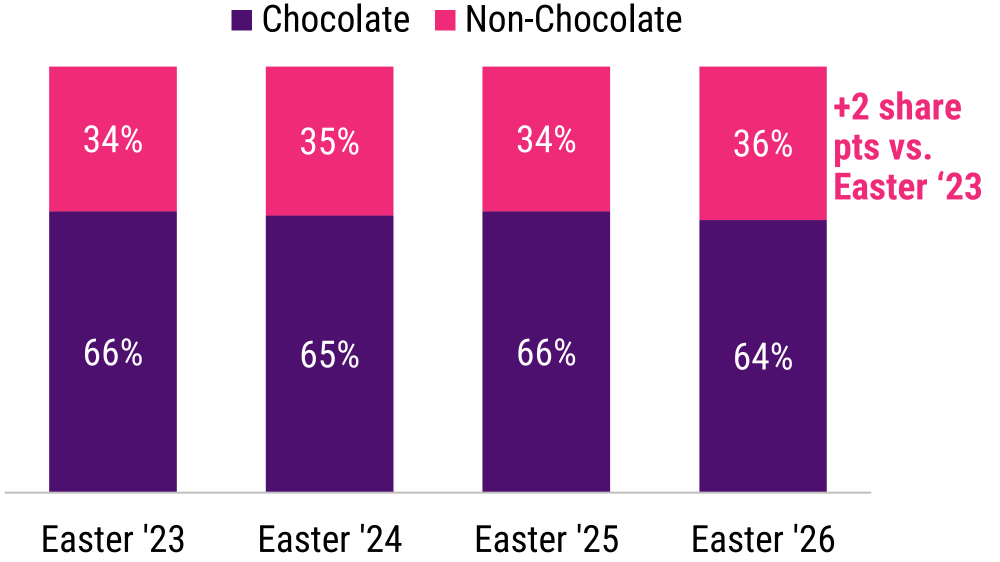
2026 Easter Category Performance



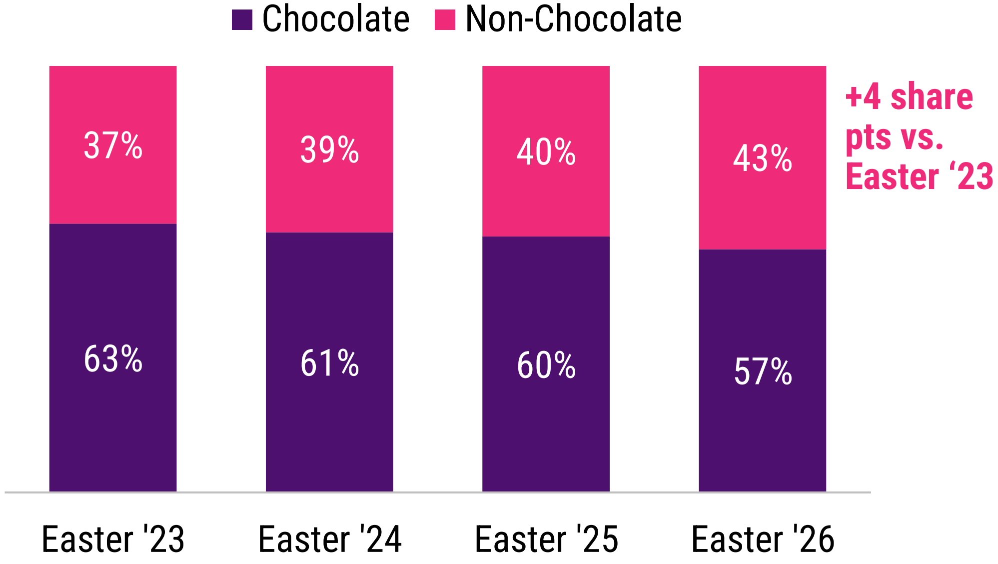
2026 Easter Seasonal Items Performance



Dollar Share of Seasonal Easter Candy



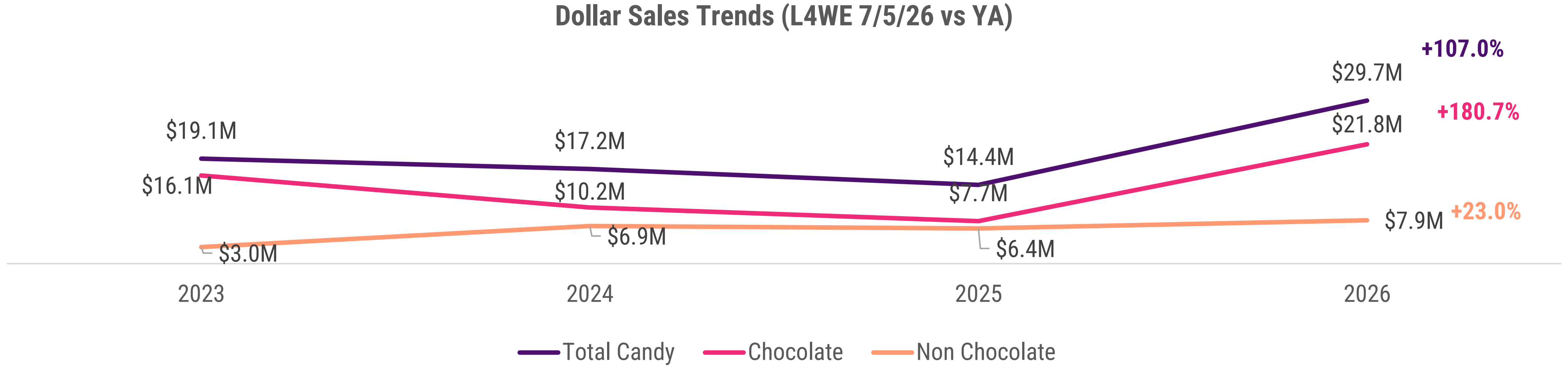
Volume Share of Seasonal Easter Candy

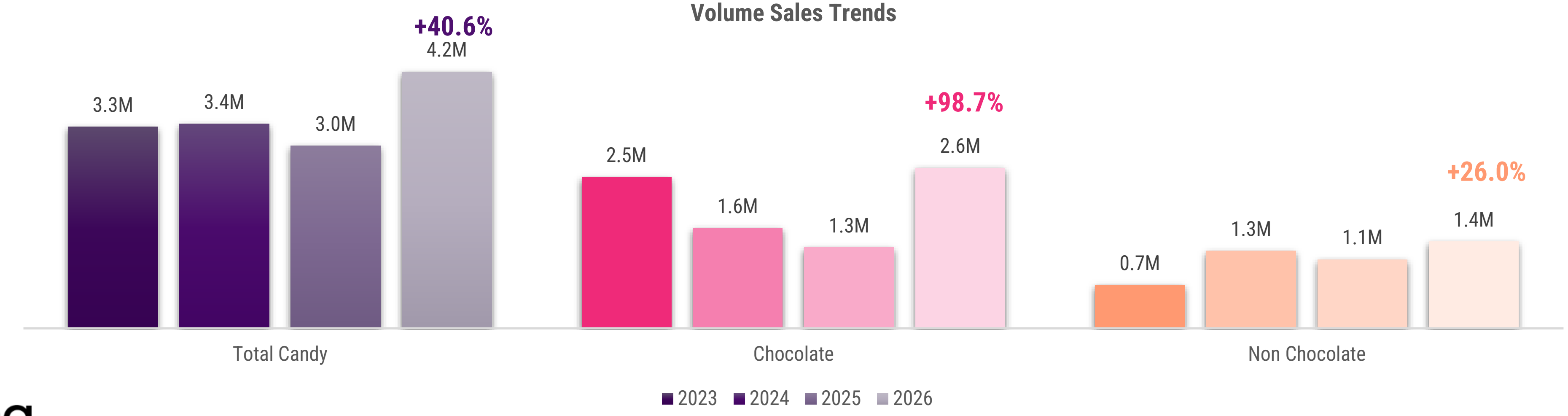


Circana POS, MULO+ with C, 7 Weeks ending 04-05-2026

A meaningful rebound observed in summer seasonal candy sales, signaling demand

Dollar Sales Trends –Summer Seasonal Candy*





**Summer Seasonal Candy = all Candy UPCs marked as July 4th/Summer/Patriotic. This is a directional view of this segment based on UPC coding*
Source: Circana POS, Total US MULO+ w/Convenience, 4 WE 7/5/26

70% of consumer participate in both Super Bowl and Valentine's Day

75% of shoppers are interested in ideas that combine both

Source: NCA's Sweet Insight, Calendar Clash 2027

From Party Snacks to Sweet Treats: Display Trends for Super Bowl & Valentine's Day

Top 10 Displayed Categories in Grocery

Super Bowl 2026

- Salty Snacks
- Carbonated Beverage
- Crackers
- Chocolate Candy
- Non-Chocolate Candy
- Bottled Water
- Cookies
- Snacks Nuts/Seeds
- Wine
- Fresh Bread

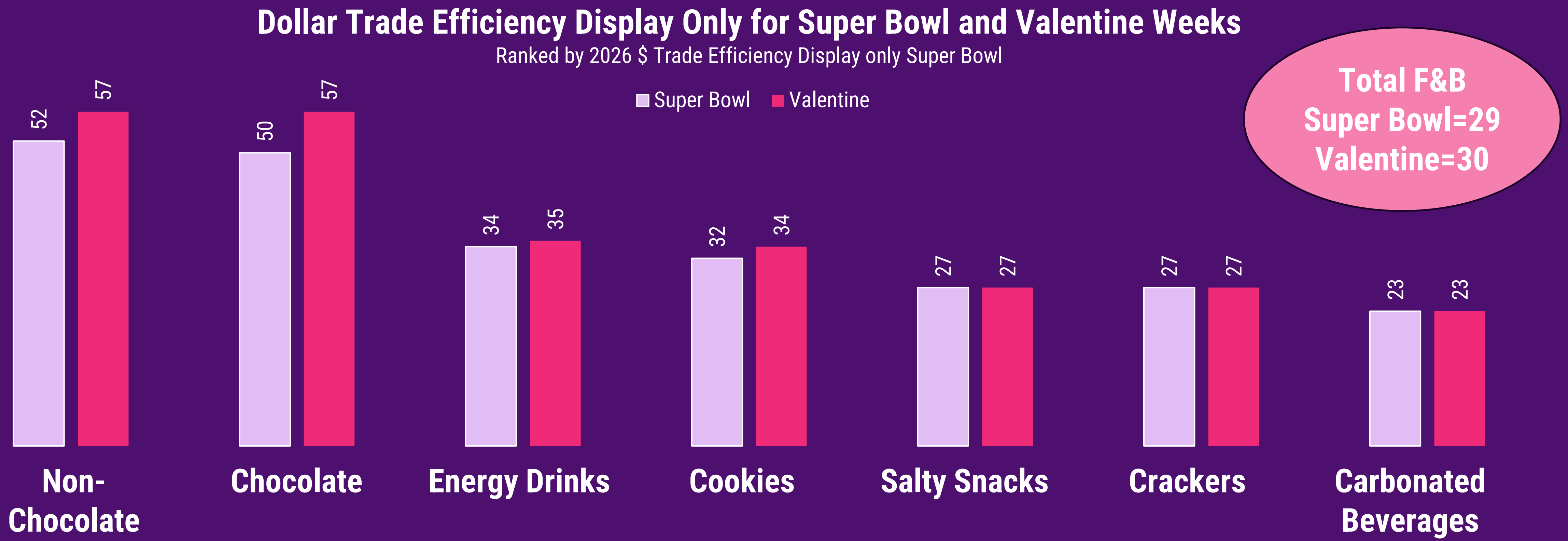
VS.

Valentines 2026

- Salty Snacks
- Crackers
- Carbonated Beverage
- Cookies
- Chocolate Candy
- Non-Chocolate Candy
- Bottled Water
- Snacks Nuts/Seeds
- Fresh Bread
- Wine

Source: Enhanced Display 2022-2026, Circana TSV, MULO+ with C, 2 Weeks Ending February 8th, 2026(Super Bowl) Vs. 7 Weeks Ending February 15th, 2026(Valentines)

Both Non-Chocolate and Chocolate are top producing categories when on Display









Source: Circana POS, MULO+ with C, 7 Weeks Ending 2-15-2026 and 2 Weeks Ending 2-8-2026

During seasonal periods, confections dominate the seasonal aisle as the primary traffic and excitement driver

Distribution Seasonal Aisle	Valentine	Halloween	Holiday
Chocolate Candy	81.8% ▲	78.8%	77.8%
Non-Chocolate Candy	79.6% ▲	78.6%	76.5%
Decorations/Toppings	30.9% ▲	31.1%	24.5%
Salty Snacks	28.1% ▼	38.2%	39.3%
Baking Needs	24.5% ▼	26.9%	29.4%
Cookies	23.4% ▼	38.0%	63.5%
Other Snacks	22.1%	28.5%	48.9%

Sources: Circana Enhanced Display, Total US – Food, Seasonal Time Periods, Ranked by ACV Weighted Distribution (Valentine)

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Today's Agenda

01

Sweet Shifts

The forces reshaping confection

02

The Next Sweet Thing

Innovation and Growth Opportunities ahead

03

Seasonal Sweetness

Winning the holidays and occasions that matter

04

The Future is Sweet

Key opportunities and actions

The Future is Sweet

01 Confections brand equity is strong

02 Win with digitally engaged consumers to capture incremental growth

03 Innovation fuels growth, creating a winning opportunity for confections

04 Engage early in the season to consumers for early buys and likely repeats

05 Consumers plan to participate with both the Super Bowl and Valentine, creating an overlap audience

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Thank you

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