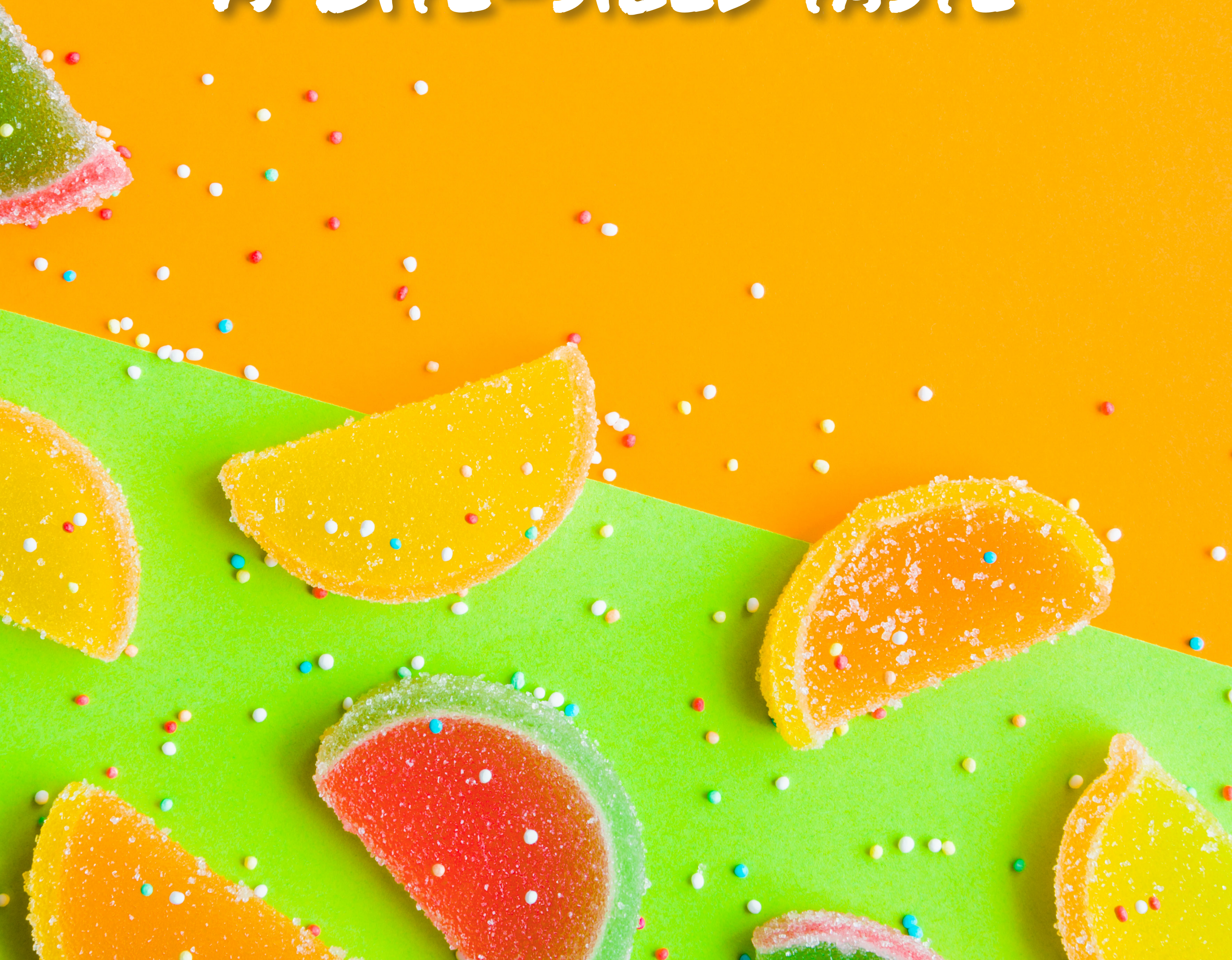
NCA

National Confectioners Association

ALWAYS A TREAT

Sweet Insights: State of Treating 2021

A Bite-Sized Taste



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CHOCOLATE COMPANY

Methodology

This report is based on consumer studies by NCA and 210 Analytics conducted in September and December 2020 among 1,500+ qualified shoppers ages 18-75 in each study.

Data Overlay

The attitudinal survey data is complemented by retail measurement and household panel data provided by insights firm IRI for the 52 weeks ending December 27, 2020.

Unless otherwise attributed, data throughout this report are provided by NCA and 210 Analytics.

A Message from NCA President & CEO John Downs

In March 2020, NCA debuted the *State of Treating* report, a seminal piece of research that blends confectionery category performance data, primary consumer research and thoughtful analysis of the trends essential for confectionery manufacturers and retailers to understand the confectionery market.

Who could have known that only a few days after the release of the 2020 report, our world would be turned upside down by a global pandemic?

So much has changed in a year — and the changes have been profound for our category, too. Differences in how and where we shopped for confectionery, what we bought and how much we shopped were motivated by health and safety concerns, price, promotions and an eye toward balance.

Despite some dramatic shifts and changes, two things in particular have remained constant. The first is the enduring place chocolate, candy, gum and mints have in our hearts and our lives because of the emotional connection we have with them. COVID-19 changed consumer behavior but not the desire for permissible indulgence, especially when that indulgence was shared with friends and family. When we were kept apart through stay-at-home orders and social distancing, chocolate and candy had a special role in bringing us together and connecting us to the ones we love. It's no wonder that confections found their way into our Zoom parties, driveway gatherings and at-home movie nights with the kids (or our moments of quiet retreat). And of course, Americans found new and creative ways to celebrate the socially-distanced holidays, maintaining the great tradition of gifting chocolate and candy.

From everyday moments of joy to the special place they hold in our celebrations, chocolate and candy are honest and authentic treats. That is why I continue to be so proud of our industry's "Always A Treat" commitment to providing consumers information, options and support as they enjoy our products.

The second constant is that confectionery is a strong and important category that offers both inexpensive treats and premium indulgence — which is exactly why it shows strength in good and bad economic times. Confectionery rang up $36.7 billion in sales in 2020 and was the fifth-largest center store category. Our category is better positioned than ever for sustained growth, and our industry has become more consumer-centric in the way it markets its products. It is a true testament to the resilience of the category.

In 2021 the virus, the vaccine and the economic impacts of the pandemic will continue to dominate the headlines. But through all of the ups and downs, candy will remain essential to our emotional well-being, our economic recovery and the social fabric of our world.

The *State of Treating* 2021 report aims to bring an understanding of consumer perceptions, attitudes and behaviors regarding confectionery to help our industry optimize production, marketing, merchandising and branding decisions, particularly now during this time of profound change. I am pleased to share this *Bite-Sized Taste* of what you'll find in the full report, available **online**.

Always a treat,

John Downs

Category and Channel Performance

Food retail experienced two of the biggest sales weeks in its history in mid-March, with widespread shelter-in-place mandates due to the pandemic. Trips jumped as consumers visited many stores to stock their freezers, fridges and pantries. But come late March and April, trips fell far below 2019 levels and remained subdued throughout the year. Whereas trips dropped, the average basket size rose far above 2019 levels.

2020 CONFECTIONERY CATEGORY PERFORMANCE

$36.7B

U.S. confectionery sales in 2020 (down 0.2% over 2019)

$39.5B

projected category sales by 2025

Source: Euromonitor & NCA Projections (rounded)

Engagement with chocolate and non-chocolate largely normalized by the end of 2020; engagement and sales for both gum and breath fresheners remained subdued as consumers spent more time at home.

CHOCOLATE
58% of $ sales
+4.2% growth
$21.9B
$23.4B projected 2025

NON-CHOCOLATE
30% of $ sales
+2.9% growth
$11.5B
$12.1B projected 2025

GUM + MINTS
12% of $ sales
-22.7% growth
$3.9B
$4.1B projected 2025

Source: IRI, MULO + C, 52 weeks ending 12/27/2020; Euromonitor & NCA Projections (rounded)

2020

98.4% household penetration

33 annual trips

Average spend of **$5.95/trip**

Change **-0.4%** **-6.3%** **+7.6%**

Source: IRI, All Outlets, 52 weeks ending 12/27/2020

*Note: Figures in **blue** represent IRI-measured channels. Figures in **coral** represent Euromonitor data and NCA projections for the total confectionery category, including non-IRI tracked channels (ie, specialty stores).*

2020 CHOCOLATE, NON-CHOCOLATE, GUM & MINTS PERFORMANCE

Despite the pandemic-driven changes in shopping, working and social routines, there was also an important constant: confectionery remained a strong and important category. Chocolate accounted for the largest share and the highest growth percentage in 2020. Chocolate's strong performance is rooted in continued high household penetration, with 28% of chocolate consumers indicating they are eating it a little more often than pre-pandemic. Non-chocolate saw less engagement early in the pandemic but strongly rebounded late in 2020. Shoppers cited wearing masks, being around people less, saving money and eating out less as the chief reasons for enjoying gum and breath fresheners less often.

2020 Chocolate		Change
Total chocolate: $15.2B		
	Dollar sales	+4.2%
	Unit sales	-2.0%
	Volume sales	-1.0%
Bag/box/bar >3.5 oz.: $5.8B		
	Dollar sales	+9.3%
	Unit sales	+5.1%
	Volume sales	+4.2%
Bag/box/bar <3.5 oz.: $4.5B		
	Dollar sales	+3.0%
	Unit sales	-4.5%
	Volume sales	-8.4%
Total seasonal: $3.1B		
	Dollar sales	-3.6%
	Unit sales	-4.5%
	Volume sales	-8.4%
Snack size: $1.2B		
	Dollar sales	+5.7%
	Unit sales	+6.3%
	Volume sales	+2.0%
Gift box: $294M		
	Dollar sales	+3.1%
	Unit sales	+3.7%
	Volume sales	-4.6%
Sugar-free: $190M		
	Dollar sales	+16.8%
	Unit sales	+11.5%
	Volume sales	+11.0%
Novelty: $8M		
	Dollar sales	-17.8%
	Unit sales	-6.9%
	Volume sales	+13.4%

2020 Non-Chocolate		Change
Total non-chocolate: $7.9B		
	Dollar sales	+2.9%
	Unit sales	-2.3%
	Volume sales	-1.2%
Chewy: $4.0B		
	Dollar sales	+6.9%
	Unit sales	+0.1%
	Volume sales	+2.3%
Total seasonal: $1.2M		
	Dollar sales	-0.9%
	Unit sales	-5.1%
	Volume sales	-1.8%
Novelty: $851M		
	Dollar sales	+5.2%
	Unit sales	+3.4%
	Volume sales	-4.8%
Hard sugar and rolls: $539M		
	Dollar sales	-8.8%
	Unit sales	-12.7%
	Volume sales	-12.6%
Licorice: $482M		
	Dollar sales	+6.3%
	Unit sales	+4.1%
	Volume sales	+7.5%
Plain mints: $332M		
	Dollar sales	-13.7%
	Unit sales	-15.5%
	Volume sales	-18.4%
Specialty nut/coconut: $331M		
	Dollar sales	-1.9%
	Unit sales	-8.5%
	Volume sales	-5.5%
Caramel/taffy: $107M		
	Dollar sales	+18.2%
	Unit sales	+12.7%
	Volume sales	+10.2%
Sugar-free: $90M		
	Dollar sales	-4.8%
	Unit sales	-8.6%
	Volume sales	-7.9%

2020 Gum and Mints		Change
Total gum & mints: $3.0B		
	Dollar sales	-22.7%
	Unit sales	-27.1%
Total gum: $2.5B		
	Dollar sales	-21.7%
	Unit sales	-26.9%
	Volume sales	-23.4%
Regular gum: $2.0M		
	Dollar sales	-22.3%
	Unit sales	-28.5%
	Volume sales	-24.5%
Breath fresheners: $560M		
	Dollar sales	-26.8%
	Unit sales	-28.2%
	Volume sales	-25.0%
Sugarless gum: $368M		
	Dollar sales	-18.7%
	Unit sales	-21.9%
	Volume sales	-17.3%

Source: IRI MULO+C, 52 weeks ending 12/27/2020

"I'M A FOODIE and normally try new restaurants every week or two. Since they're closed, I buy new items at the store instead. Found some real gems like chocolate covered gummy bears!"

- Maggie, 31, San Francisco

2020 SEASONAL PERFORMANCE

In the past few years, seasonal items (holiday-specific SKUs due to packaging, shape, type, color or flavor) have been powerful drivers of growth for confectionery. In 2020, many retailers purchased more everyday candy versus holiday-specific candy for Halloween and the winter holidays. Following several years in which seasonal candy led all growth, 2020 was the year of everyday chocolate and non-chocolate.

Valentine's Day was the only one of the four major confectionery holidays that was not affected by the pandemic. Shelter-in-place mandates during the Easter season limited traditional gifting and sharing, though consumers still purchased confectionery in stores and online, resulting in a year-over-year increase in dollar sales.

2020	Everyday Candy	Seasonal Candy
Dollars	$18.8B	$4.3B
Dollars % change	+5.4%	-2.8%
Units % change	-1.6%	-4.6%
Volume % change	+0.4%	-6.1%

Source: IRI, MULO+C, 52 weeks ending 12/27/2020

In the fall, Halloween celebrations extended beyond traditional trick-or-treating, which meant a buying shift from Boomers to parents, earlier merchandising in stores and purchases in different channels, including e-commerce. November and December saw subdued holiday travel, smaller gatherings and renewed shelter-in-place mandates for some cities and states, but shoppers still purchased as much as or more holiday candy than normal.

Chocolate and non-chocolate, excluding gum and mints	Valentine's Day	Easter	Halloween	Winter Holidays
Time period	6 wks ending 2/16/20	8 wks ending 4/12/20	8 wks ending 11/1/20	8 wks ending 12/27/20
Brick-and-mortar minus online orders for delivery/pickup				
Total period sales	$2.7B	$3.7B	$3.9B	$4.1B
Total period $ % change vs. YA	+1.3%	-2.6%	-1.0%	+4.1%
E-commerce				
Total period sales	$214M	$422M	$461M	$649M
Total period % change vs. YA	+21.0%	+85.2%	+86.9%	+66.0%
Total performance				
$ sales	$2.9B	$4.1B	$4.3B	$4.7B
% Change vs. YA	+2.5%	+2.4%	+4.3%	+9.7%

Source: IRI, Total U.S., MULO+C minus click-and-collect/ delivery revenue and e-commerce

2020 SEASONAL PERFORMANCE

VALENTINE'S DAY 2020

Total CMG 6-week period sales: $3.2B, up +1.6%
Seasonal item sales: $661M, off -0.8%

2020 Performance % change vs. YA	Seasonal chocolate	Seasonal non-chocolate
Dollar sales	-1.8%	+2.8%
Unit sales	-5.2%	-0.4%
Volume sales	-7.7%	-6.5%
Household penetration	+35.8%	+18.5%
Households buying 2x+	+16.8%	+7.1%
Dollars/buyer	$12.35	$7.09
Dollars/trip	$6.18	$4.12

EASTER 2020

Total CMG 6-week period sales: $3.4B, off -4.1%
Seasonal item sales: $1.1B, off -7.7%

2020 Performance % change vs. YA	Seasonal chocolate	Seasonal non-chocolate
Dollar sales	-7.9%	-7.4%
Unit sales	-10.2%	-11.0%
Volume sales	-10.1%	-7.4%
Household penetration	+39.5%	+28.4%
Households buying 2x+	+21.1%	+13.0%
Dollars/buyer	$14.97	$8.43
Dollars/trip	$6.33	$4.20

HALLOWEEN 2020

Total CMG 8-week period sales: $4.0B, up +0.3%
Seasonal item sales: $597M, off -10.7%

2020 Performance % change vs. YA	Seasonal chocolate	Seasonal non-chocolate
Dollar sales	-15.5%	-3.4%
Unit sales	-13.8%	-11.0%
Volume sales	-34.4%	-9.9%
Household penetration	+22.2%	+21.6%
Households buying 2x+	+7.3%	+8.1%
Dollars/buyer	$12.49	$10.06
Dollars/trip	$7.99	$5.95

WINTER HOLIDAYS 2020

Total CMG 8-week period sales: $4.7B, up +1.9%
Seasonal item sales: $1.1B, up +0.2%

2020 Performance % change vs. YA	Seasonal chocolate	Seasonal non-chocolate
Dollar sales	+2.6%	-7.3%
Unit sales	-0.1%	-9.2%
Volume sales	-3.5%	-9.2%
Household penetration	+44.6%	+31.8%
Households buying 2x+	+24.4%	+14.3%
Dollars/buyer	$17.20	$7.09
Dollars/trip	$7.28	$3.67

Source: IRI, MULO+C, 52 weeks ending 12/27/2020
**CMG = Candy, mints and gum*

74% **of millennial moms and young parents** said that Halloween was more important than ever in 2020.

Source: Harris Poll 2020

2020 CHANNEL PERFORMANCE

The pandemic put pressure on in-store trips, with some shoppers preferring to purchase online or combine all needs into one trip, rather than visiting multiple outlets. This favored grocery and hurt the drug and specialty channels.

2020 Grocery channel		Change
Total CMG: $7.1B		
	Dollar sales	+6.1%
	Unit sales	-2.9%
Total chocolate: $4.6B		
	Dollar sales	+10.5%
	Unit sales	+1.0%
	Volume sales	+5.1%
Total non-chocolate: $1.8B		
	Dollar sales	+9.9%
	Unit sales	+1.5%
	Volume sales	+5.9%
Total gum/mints: $740M		
	Dollar sales	-20.3%
	Unit sales	-25.2%

2020 Drug channel		Change
Total CMG: $2.7B		
	Dollar sales	-8.5%
	Unit sales	-15.3%
Total chocolate: $1.6B		
	Dollar sales	-5.1%
	Unit sales	-13.3%
	Volume sales	-11.6%
Total non-chocolate: $753M		
	Dollar sales	-5.2%
	Unit sales	-10.0%
	Volume sales	-9.5%
Total gum/mints: $280M		
	Dollar sales	-29.9%
	Unit sales	-35.4%

2020 Convenience channel		Change
Total CMG: $6.0B		
	Dollar sales	-2.8%
	Unit sales	-9.5%
Total chocolate: $2.9B		
	Dollar sales	+1.7%
	Unit sales	-4.8%
	Volume sales	-3.3%
Total non-chocolate: $2.2B		
	Dollar sales	+4.4%
	Unit sales	-4.6%
	Volume sales	-0.8%
Total gum/mints: $957M		
	Dollar sales	-24.7%
	Unit sales	-29.3%

2020 Grocery channel		Change
Everyday candy: $5.3B		
	Dollar sales	+13.4%
	Unit sales	+2.4%
	Volume sales	+8.3%
Seasonal candy: $1.1B		
	Dollar sales	-2.2%
	Unit sales	-4.8%
	Volume sales	-6.2%

Source: IRI Grocery, 52 weeks ending 12/27/2020

2020 Drug channel		Change
Everyday candy: $1.8B		
	Dollar sales	-4.8%
	Unit sales	-13.8%
	Volume sales	-10.1%
Seasonal candy: $618M		
	Dollar sales	-6.2%
	Unit sales	-6.8%
	Volume sales	-12.6%

Source: IRI Drug, 52 weeks ending 12/27/2020

2020 Convenience channel		Change
Everyday candy: $4.9B		
	Dollar sales	+3.2%
	Unit sales	-4.5%
	Volume sales	-1.6%
Seasonal candy: $153M		
	Dollar sales	-7.7%
	Unit sales	-13.1%
	Volume sales	-17.0%

Source: IRI Convenience, 52 weeks ending 12/27/2020

Conversion, the share of shoppers who buy confectionery at their primary store, remained high at 72% for everyday confectionery and 59% for seasonal candy.

2020 ONLINE PERFORMANCE

Online confectionery sales skyrocketed in 2020. Households buying candy online at least twice in 2020 increased 76%, and the annual online dollars per buyer increased 14.3%. Delivery or pickup from local grocery stores surpassed general online retailers as the top online outlets.

78%

of online grocery shoppers also purchase everyday candy online.

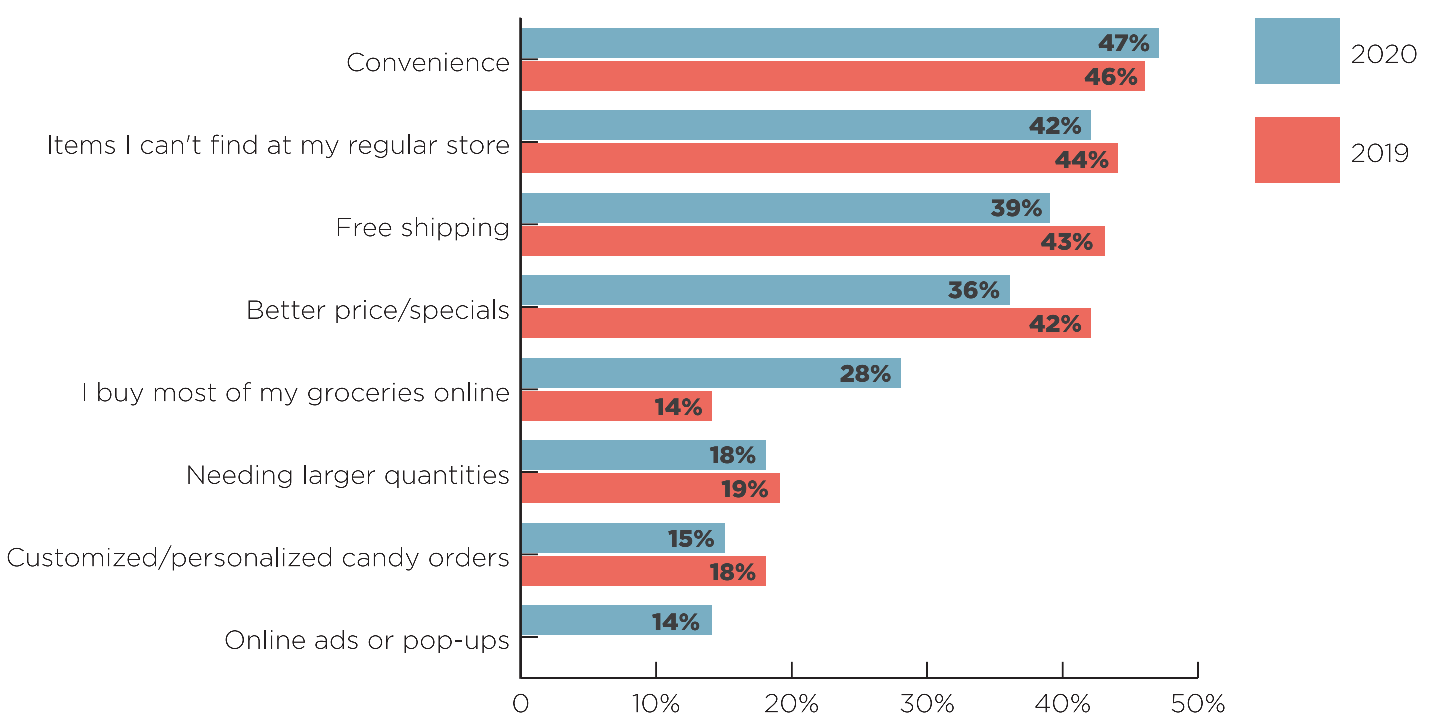
68%

of online grocery shoppers also purchase seasonal confectionery online.

	Total e-commerce		
	Dollar Sales	**Dollar Sales Change vs. YA**	**Dollar Sales %Change vs. YA**
Candy aisle	**$3.0B**	**$1.73B**	**+74.7%**
Chocolate	$1.9M	$1.06B	+76.5%
Non-chocolate candy	$933.2M	$527.4M	+77.0%
Gum	$175.1M	$115.5M	+51.6%
Breath fresheners	$50.7M	$31.0M	+63.4%

Source: IRI, E-commerce, 52 weeks ending 12/27/2020

Shoppers cite a variety of reasons for diverting at least some of their confectionery purchases to online retailers.



2020 Changes in Behavior

In all, 61% of shoppers changed up their confectionery purchases during the pandemic in one or more ways. Throughout the pandemic, value packs and snack-size packs have been tracking well ahead of last year as consumers adjust for fewer store trips and buy for multiple occasions.

Among consumers who started purchasing different pack sizes amid the pandemic:

41% bought more value packs with individually wrapped candies.

38% purchased fewer individual items, such as those found at checkout.

Chocolate and candy are most often enjoyed:

78% on their own

41% in baked goods

33% on ice cream

30% for movie night at home

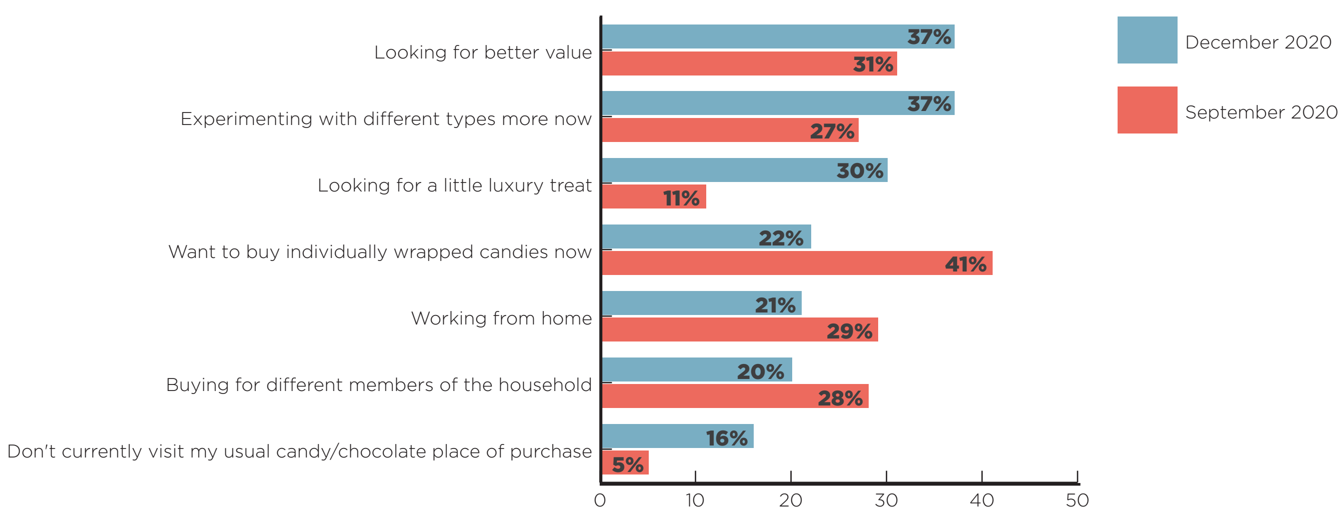
Top 4

BEHAVIORAL CHANGES IN 2020

1. Buying different pack sizes
2. Buying different brands
3. Buying different items
4. Shopping at different stores

Experimentation and Value Drove Different Candy Choices

Shoppers cited a variety of reasons for changing their candy purchases:



Gifting

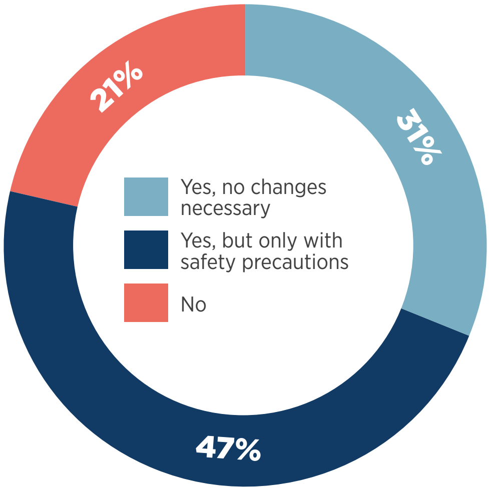
Gifting remains a big selling opportunity, with 87% of consumers gifting candy or chocolate during ordinary times and 36% of consumers having sent or dropped off confectionery gift baskets or care packages in lieu of visiting people during the pandemic.

> ***"I WASN'T ABLE TO VISIT MOM ON MOTHER'S DAY,** so I bought flowers and chocolates to be delivered to her house instead."*
>
> *- Ruben, 47, Memphis*

Bulk Candy

During ordinary times, 40% of respondents buy from bulk candy sections with loose, scoop-your-own items at their grocery stores, candy stores, theaters or other settings. Of them, 78% are still willing to buy in bulk.

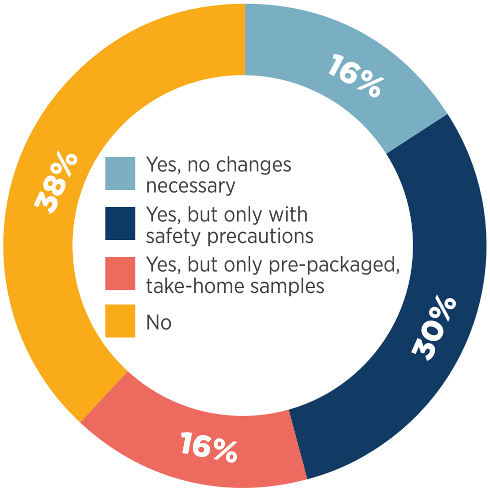
Current willingness to buy from bulk candy sections



Chocolate and Candy Sampling

Sampling can be a powerful way to drive unplanned purchase and trial. However, since it often requires personal interaction, many stores discontinued sampling amid the pandemic. Sampling may still be an option if done differently.

Interest in sampling new confectionery items



Emotional Well-Being

For generations, chocolate and candy have enjoyed a special place in our lives, delivering everyday moments of joy and filling a special role in our holidays and celebrations.

As our understanding of candy's role in a balanced lifestyle has evolved, so, too, have our notions of well-being – particularly during the pandemic when self-care took on elevated importance. The choices we make about food are no longer just about fuel and physical health benefits, but instead place greater value on their contributions to our sense of balance and happiness – our emotional well-being.

77%

of consumers feel that good emotional well-being leads to better physical health and makes it possible to enjoy life and be happier.

Permissibility

Chocolate and candy enjoy a high level of permissibility and play a unique role in helping consumers maintain their emotional well-being. Treats help people explore new experiences, delight others with sharing and gifting, relive childhood memories, take a break and trigger positive feelings.

Celebrating everyday and special occasions, togetherness, sharing and gifting are all rooted in emotional well-being.

Balance

As consumers recognize the role of chocolate and candy as an occasional treat, most Americans already understand balance. Americans enjoy candy an average of two to three times per week – an average of about 40 calories per day and just one teaspoon of added sugar per day. Offering portion guidance as a strategy for achieving balance is met with great appreciation.

2/3 **of consumers agree** that it is important for chocolate and candy brands to offer portion size variety.

75% of Americans and **91%**
of millennial moms and young parents
agree that chocolate and candy are integral to consumers' emotional well-being and play a big role in celebrations.

Source: Harris Poll 2020

Always A Treat

America's chocolate and candy companies are committed to helping consumers manage their sugar intake by empowering them to make informed choices and helping them satisfy their emotional well-being needs one treat at a time. Visit **AlwaysATreat.com** for more information.

PARTNERSHIP FOR A HEALTHIER AMERICA **BY 2022:**

90% of best-selling treats will have calorie information on the front of the pack.

1/2 of individually wrapped products will have 200 calories or less.

PARENTS AND CONFECTIONERY

Discussing Balance Versus Restriction

At home, most parents opt to discuss balance and take control of their kids' chocolate and candy consumption.

Parents appreciate the industry's commitment to providing choice and transparency. While only 16% of parents frequently purchase chocolate or candy at checkout, parents report knowing about the industry's commitment to smaller pack sizes with fewer calories and front-of-pack calorie labeling makes 78% of them feel more empowered to make informed choices.

5 in 6 parents monitor their children's consumption versus having it readily accessible for their kids' own choosing.

3 in 4 parents discuss balance in everyday and seasonal candy consumption with their children.

Pandemic Greatly Impacts Classroom Exchange Traditions

Two-thirds of school-aged children were participating in virtual education at the beginning of 2021. Of the 23% of children who attend school in person, 68% have restrictions in place for celebrations. Between virtual education and restrictions with in-person education, classroom exchanges for confectionery holidays, such as Valentine's Day, Easter or Halloween, have been and will continue to be highly affected by the pandemic. Despite these realities, Americans continue to find new and creative ways to safely celebrate holidays and uphold traditions.

62% **of parents use chocolate/candy** as a little reward or treat for their kids enrolled in virtual education.

In-Person Schooling Precautions and Restrictions

42% do not allow any birthday celebrations/treating.

38% do not allow any holiday celebrations/treating.

62% of schools where some celebrations or treating is permitted only allow individually wrapped, store-bought treats.

Social Responsibility & Sustainability

CONSUMERS WANT TO KNOW MORE

While safety dominated the headlines in 2020, younger generations in particular want to purchase foods and brands that align with their values and personal goals. Shoppers are paying increased attention to package and production claims in categories across the store, including confectionery, and that trend is likely to grow.

Top ingredient-related attributes and claims sought out by consumers when buying confectionery:

All-natural (46%)

No artificial colors/flavors/ sweeteners (38%)

Non-GMO (28%)

No high fructose corn syrup (28%)

41%

of all consumers say that transparency in ingredient sourcing and production processes influences their chocolate and candy purchases. This number jumps to **48%** for younger millennials.

Growth in Certifications

Consumer interest in package claims resulted in a strong 2020 performance for gluten-free, non-GMO and organic products. Gluten-free was the biggest area of sales, and non-GMO was the fastest growing. Organic claims worked well for chocolate, while gluten-free claims worked best for non-chocolate.

20% of consumers look for certifications and labels when purchasing chocolate and candy. Among them, Fair Trade is the most sought-after claim, followed by Rainforest Alliance and Certified Organic/ USDA Organic.

Total candy	$ sales	$ growth
Total	**$23.1B**	**+3.7%**
Gluten-free	$730M	+13.5%
Non-GMO	$179M	+18.7%
Organic	$122M	+6.1%

Source: IRI, 52 weeks ending 12/27/2020

"I'M A VEGETARIAN, and I tried veganism for a while but missed my chocolate too much. I do want to know that workers were paid a fair wage and that the product is all natural, no artificial ingredients."

- Mariana, 26, Boston

Gen Z and Millennials

are the driving forces behind the demand for greater transparency. They are also the ones driving category growth.

ENVIRONMENTAL SUSTAINABILITY

Brands and retailers alike have elevated their environmental practices and corporate goals to address sustainable sourcing, package and food waste, reduction of water and energy resources, their carbon footprints and other environmental issues. These platforms are important to about four in 10 confectionery shoppers – and even more younger shoppers.

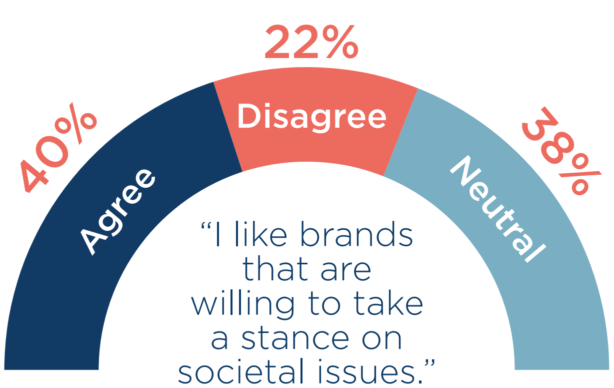
51%

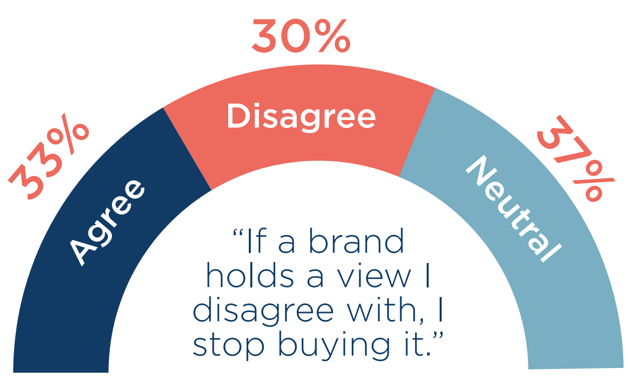
of Gen Z consumers

indicate confectionery brands engaging in waste-focused initiatives (reduced packaging, biodegradable packaging, etc.) influence their purchasing decisions.

COMMUNITY TIES AND VALUES

More than half of shoppers also like to buy from companies that give to the community or charities, and 45% reward confectionery brands that match their own values and beliefs through a greater purchase likelihood. As such, transparency can build trust and provide long-term value. Brand positioning may also include taking a stance on societal issues.





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National Confectioners Association
ALWAYS A TREAT

NCA's second annual *Sweet Insights: State of Treating* 2021 report offers insights that fuse proprietary NCA consumer survey findings with 2020 syndicated category and channel performance data. This collection of insights is intended to provide a deeper understanding of consumer wants and needs during the COVID-19 pandemic, corresponding shifts in the retail landscape and opportunities for the future to support continued category growth.

Key areas of exploration in the *State of Treating* report include:

- Channel choices, including a deep dive into online confectionery sales
- Purchasing habits and changes, including decision influencers
- Category engagement and behavioral changes during the pandemic
- The importance of transparency, social responsibility and environmental sustainability

To download the full report and other graphic resources, visit CandyUSA.com/StateOfTreating.

National Confectioners Association
1101 30th Street NW | Suite 200 | Washington, DC 20007
(202) 534-1440 | CandyUSA.com