

# STATE OF TREATING

## 2025

## NCA sweet INSIGHTS

The 6<sup>th</sup> annual State of Treating reflects on confectionery shopping and treating trends in 2024 — a year when many consumers altered their purchases to make the most of their budgets. 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 2025 and beyond.

This Bite-Sized Taste summarizes the findings and implications presented in the full State of Treating 2025 report, available at [CandyUSA.com/StateOfTreating](https://CandyUSA.com/StateOfTreating).

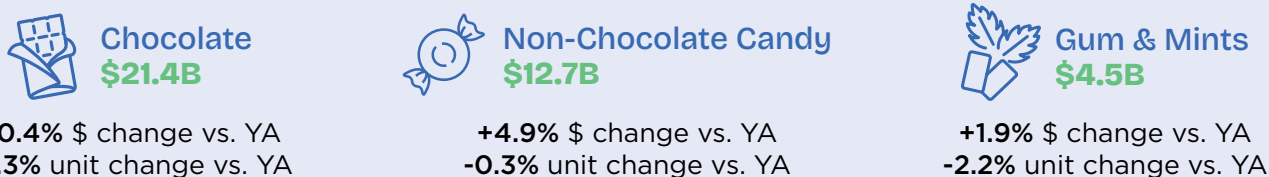
### KEY FACTS AND FIGURES

Across all outlets, including vending, e-commerce, candy stores, etc., confectionery sales reached \$54 billion in 2024. A little over half of sales were driven by chocolate.



Source: Euromonitor | Passport Model January 2025

In the Circana-measured marketplace that includes grocery, mass, club, commissaries, convenience, drug, and dollar stores, 2024 U.S. confectionery sales reached \$38.6 billion. Price increases boosted year-over-year dollar gains while unit and volume sales decreased. Non-chocolate candy outperformed and gained share in 2024.



Source: Circana, Total US, MULO+ with Convenience, 52 w.e. 12/29/2024



**NCA Sweet Insights: State of Treating 2025<sup>®</sup>**  
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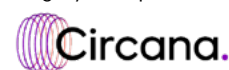
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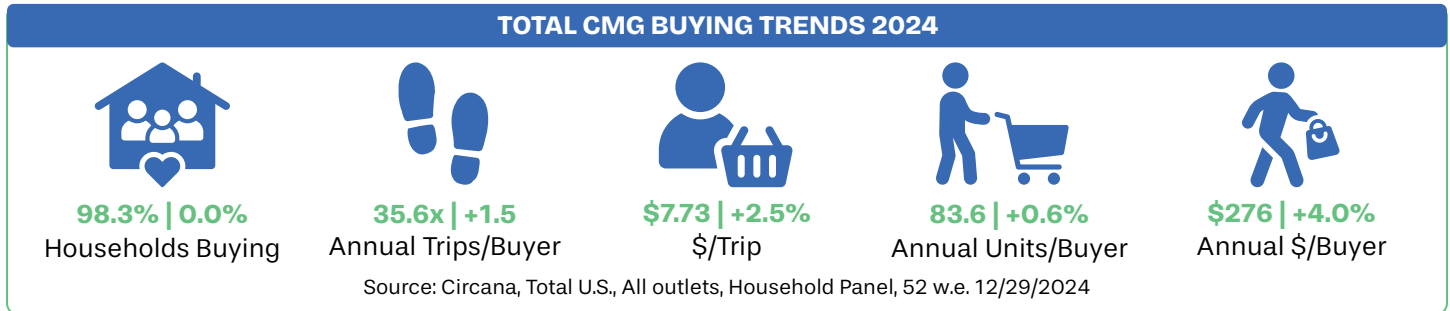


# Key Takeaways & Industry Implications

## 2024 PERFORMANCE

In 2024, 98% of households purchased confectionery at least once. Consumers bought treats a little more frequently but also switched between retail channels, pack sizes, types, and brands to stretch their confectionery dollar. This led to total category unit and volume declines, and especially so for chocolate.

### TOTAL CMG BUYING TRENDS 2024



**Implication:** Prioritize the visibility of confectionery both in store and online to encourage additional trips. Improve trip conversion through endcaps, secondary displays, and creating an engaging retail environment.

## MINDFUL SHOPPING

The marketplace prompted many changes, including treating a little less, according to 30% of Americans. Eighty percent of these consumers said price was *the* or a factor for consuming less. Additionally, price is now the number one purchase decision factor, whereas mood has taken the top spot in years past. Sales promotions were key in 2024, with consumers favoring BOGOs and mix-and-match discounts.

**Implication:** Take advantage of confectionery's strong trade efficiency to secure valuable shelf space, as well as share of voice in promotions and social media. Promotions can help deliver incremental purchases and trial during key weeks and occasions that can lead to sales at full price during the rest of the year.

### % Often/usually looking for sales promotions when...

- 25%** | Buying confectionery as a gift for someone
- 41%** | Buying confectionery for oneself
- 44%** | Buying confectionery to share for holidays such as Halloween

## CHANNEL CHOICES & PURCHASE DECISIONS

Trips shifted to value-forward channels, including club and dollar stores. E-commerce showed robust growth, while drug and convenience sales declined. Additionally, consumers adjusted for inflation by purchasing different pack sizes and types of confectionery. While manufacturer brands dominate the confectionery purchase, consumers were also more likely to purchase private brand chocolate in 2024.

**Implication:** Capitalize on confectionery's brand loyalty with proven favorites that drive the majority of sales. Integrate different pack sizes and private brands to offer price point variety for value-seeking consumers.

| Private Brand Sales & Growth | Private Brand Share of Volume | Private Brand Volume vs. YA |
|------------------------------|-------------------------------|-----------------------------|
| Chocolate                    | 9.5%                          | +10.7%                      |
| Non-Chocolate Candy          | 6.7%                          | -3.3%                       |

Source: Circana, Total U.S., MULO+ with Convenience, 52 w.e. 12/29/202



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### REASONS TO SPLURGE

Value is key, but 96% of shoppers can be persuaded to spend a little more on confectionery. Reasons to spend a little more include seeing their favorite treats and brands, gifting, and special occasions. Brands win in gifting, with consumers likely to purchase a well-known brand or a brand they like themselves.

**Implication:** Leverage emotional triggers like self-care and special occasions to position confectionery as a go-to small splurge. Tap into the endless possibilities in gifting, from thank you to "just because." Cross-merchandise with other gifting categories, such as wine, floral, and greeting cards.

### Reasons to spend a little more on chocolate or candy

- 51% | If it's my favorite
- 46% | If it's a brand I like
- 42% | To do something nice for someone else/gifting
- 40% | If it's a special occasion
- 39% | If it's a holiday



**74%** gift with confectionery.  
**Of those shoppers:**  
 57% | Typically gift chocolate  
 17% | Typically gift candy

### INNOVATION

While consumers explored innovations a little less often in 2024, social media has become a powerful tool in inspiring consumers with new consumption occasions or trial. Young consumers especially are motivated by viral products and trends.

**Implication:** Leverage user-created and original social media content to spur additional usage occasions and trial throughout the year, with inspiration for gifts, baked goods, and crafts.



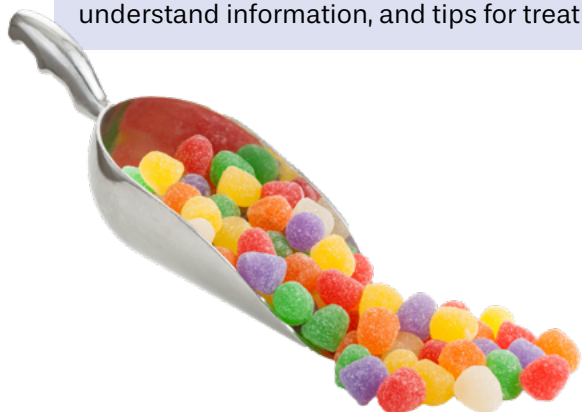
**27%**

have found a new brand or item through social media, such as Dubai chocolate, freeze-dried candy, Swedish candy, and influencer-owned brands.

### PERMISSIBILITY

Confectionery enjoys very high permissibility, with 85% believing it is perfectly fine to treat. The State of Treating confirms consumers understand the role of treating in a happy, balanced lifestyle, averaging two to three chocolate or candy treats per week.

**Implication:** Emphasize holistic well-being and self-care, and offer portion size variety, easy-to-find and understand information, and tips for treating.



### BETTER-FOR-YOU

A rising 62% of consumers believe better-for-you (BFY) confectionery exists, with popular examples being dark chocolate, organic items, and products with reduced sugar or no artificial ingredients. However, only 10% of the population frequently purchased what they consider BFY confectionery in 2024. A variety of package size options and resealable packaging draw substantial interest among consumers as part of their BFY strategy.

**Implication:** Provide a balanced assortment of classics, innovative items, and consumer-defined better-for-you confectionery options to optimize engagement and sales.





## LIFE'S OCCASIONS

The winter holidays and Halloween were the biggest seasons in 2024. Most consumers continued to celebrate the seasons, but about one-third did make changes, such as finding sales promotions or purchasing for fewer people. Even so, the four big seasons drove 62.3% of dollar sales in 2024.

**Implication:** Confectionery is integral to seasons, celebrations, and family traditions. Lean into special occasions and highlight life's many memorable moments in-store and online. Smaller holidays and seasons like Mother's Day and National Candy Month can add up and keep confectionery front and center throughout the year.



Get more seasonal insights from the National Confectioners Association, including holiday sales reviews, the 2023 Getting to Know Seasonal Consumers report, and National Candy Month resources at [CandyUSA.com/Seasonal](https://CandyUSA.com/Seasonal).

## TRANSPARENCY & SUSTAINABILITY

Consumers want choice over restriction and value transparency regarding ingredients, sourcing, and brands' sustainability commitments. Younger shoppers, particularly, are interested in learning more about the industry's initiatives using package labels and brand websites.

**Implication:** Prioritize transparency by sharing ingredient sourcing, sustainability practices, and brand commitments online, through social media, and relevant on-pack callouts.

## GROWTH MARKET

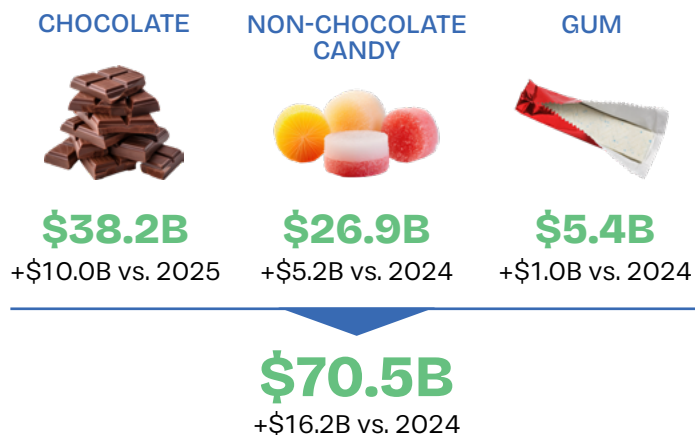
Weighing market factors and Americans' love for confectionery, Euromonitor expects continued category growth over the next five years, taking the all-in market from \$54.2 billion in 2024 to \$70.4 billion in 2029. Non-chocolate candy is expected to have a growing share of sales, while chocolate is anticipated to remain the largest seller.

**Implication:** In 2025, the themes of permissibility, affordability, and favorability will continue to be the pillars of growth for confectionery.

## 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 2024 among a national sample of 1,551 consumers between the ages of 18 and 75. The survey findings are overlaid with Circana retail measurement and household 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.

## All Outlet 2029 Sales Projections



Source: Euromonitor | Passport Model January 2025

