

NON-CHOCOLATE CONFECTIONS – US – 2024

Candy is a budget-friendly fix to satisfying cravings and exploring flavors and textures. Embrace "little treat culture" to position it for everyday indulgence.



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Non-Chocolate Confections – US – 2024

This report looks at the following areas:

- The short-, medium-, and long-term effects of inflation on non-chocolate confections and consumer behavior
- Reported purchases and changes in purchases of non-chocolate confections
- Motivations for increased non-chocolate confection purchases
- Non-chocolate confection consumption occasions
- Attitudes toward non-chocolate confections
- Factors influencing non-chocolate confection purchases
- Interest in non-chocolate confection innovation



Candy is a budget-friendly fix to satisfying cravings and exploring flavors and textures. Embrace "little treat culture" to position it for everyday indulgence.

Overview

The non-chocolate confection market thrives as consumers rely on it as an affordable and simple way to satisfy cravings and boost their mood. Nearly **90% of consumers** have bought the category in the last three months, and almost a quarter have increased their purchases. This uptick is even more pronounced amongst Gen Z and Millennials, with over 30% reporting higher purchases, signaling ample opportunities for brands to engage younger consumers to both maintain and grow their market presence.

The category is prime for innovation as 72% of candy consumers enjoy trying new non-chocolate candy varieties. This could include exploring alternative packaging, BFY formulations, flavors, formats, brand collaborations, and textures. As a category known for

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being fun and experiential, there are numerous opportunities for brands to innovate on classic products or simply reemphasize the strengths of already popular candies.

Given concerns about nutrition and the perception that candy is "only for kids," now is a fortuitous time to explore BFY options to create an avenue for both kid- and adult-friendly permissible indulgences for a variety of occasions. Beyond innovation, it will be vital to stress the value of non-chocolate confectionery as an all-day, everyday treat for all ages.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- What consumers want and why
- Non-chocolate confection sales are on a sweet trajectory
- Market predictions
- Opportunities

MARKET DYNAMICS

Market context

Market drivers

- Economic uncertainty: threat or opportunity for candy?
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 - Graph 2: launches of non-chocolate confections, 2008-23
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- Challenges in the cocoa market make non-chocolate candy look a bit sweeter
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 - Graph 3: snacking motivations, 2024
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Market size and forecast

- Stable growth in non-chocolate confections springs from indulgence, snacking habits, and economic factors
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- Varying levels of growth are projected for all segments

Market share/brand share

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- Sensorial cues and brand recognition drive candy buying decisions

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 - Graph 37: interest in non-chocolate candy innovation, by gender, 2024

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Launch activity and innovation

- Switching up texture can make old classics "new" again
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 - Graph 39: [no title]
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 - Graph 42: [no title]
- BFY varieties turn candy into a more permissible treat

Marketing and advertising

- Brands get "personal" for increased engagement
- Brands harness BFY claims to make candy a more "acceptable" indulgence

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- Creating sweet connections through a charcuterie approach to candy
- #candysalad: social media trends capture candy's ability to bring people together

Opportunities

- Recapture childhood delight with candy-centric experiences
- Candy escapism for a sweet respite from everyday life
- Evoke naturalness through connections with fruit

APPENDIX

- Market definition
- Market size methodology
- Consumer research methodology
- Generations
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- Forecast methodology
- Forecast fan chart methodology
- TURF analysis

The market

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- Total retail sales and forecast of non-chocolate confectionery, by segment, at current prices
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- Total retail sales of non-chocolate confectionery, by segment, at current prices
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- Total retail sales and forecast of hard candy, at inflation-adjusted prices, 2019-29
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- Value, average price and volume of multi-outlet seasonal candy sales
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- Value, average price and volume of multi-outlet chewy candy sales
- Total retail sales and forecast of licorice, at current prices, 2019-29
- Total retail sales and forecast of licorice, at inflation-adjusted prices, 2019-29
- Value, average price and volume of multi-outlet licorice sales
- Total retail sales and forecast of other non-chocolate confectionery, at current prices, 2019-29
- Total retail sales and forecast of other non-chocolate confectionery, at inflation-adjusted prices, 2019-29

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- Sales of licorice, by company
- Sales of other non-chocolate confectionery, by company

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