

Not All Markets Snack Alike: Find Your Next Local Growth Opportunity

Think nationally. Activate locally.

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Contradictory Headlines. Consistent Reality.

Snacking market remains resilient.

Snacking takes a hit as people shift to food staples.

Protein & Functional snacking is booming.

Indulgent snacking isn't going away.

Consumers are willing to pay for products that deliver.

Consumers are moving towards private label.

Consumers are snacking for nutrition.

Consumers are snacking by emotion.

Because there is no single snacking story...

55%

Snack when
they're
hungry



50%

Snack for
pleasure or
joy



40%

Snack for
reward



40%

Snack for
indulgence



30%

Snack when
stressed



Source: NIQ, BASES Snacking Survey, n=3, 213, 2025

Is there such
a thing as the
**AMERICAN
SNACKER?**

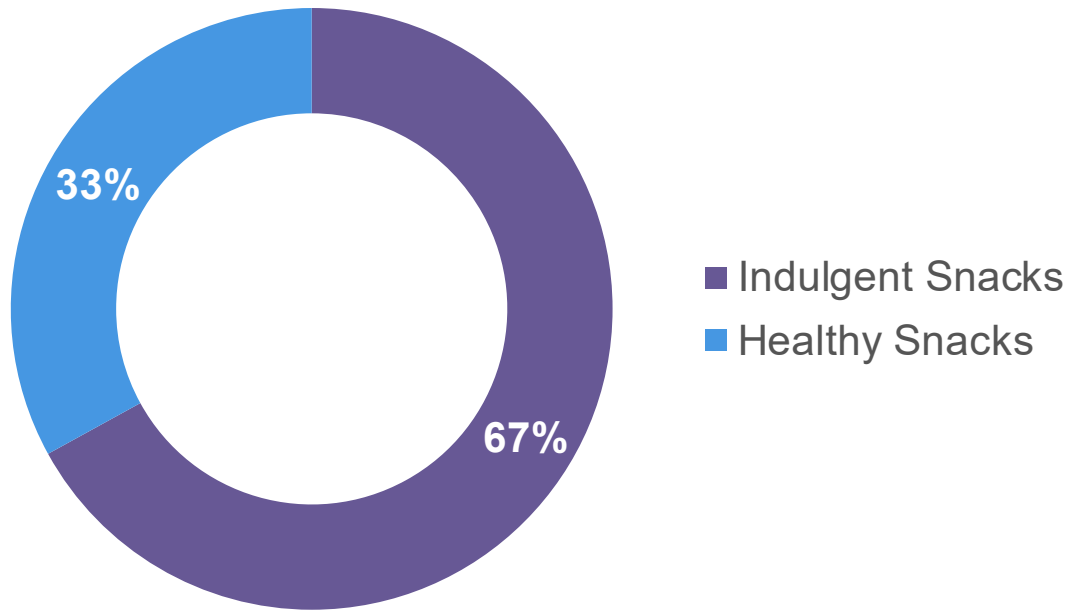


Traditional growth tactics fall short in today's **localized, value-driven market**. Fragmented tools and national averages hide local realities, slowing decisions and wasting spend.



Source: NIQ Consumer Outlook, 2026

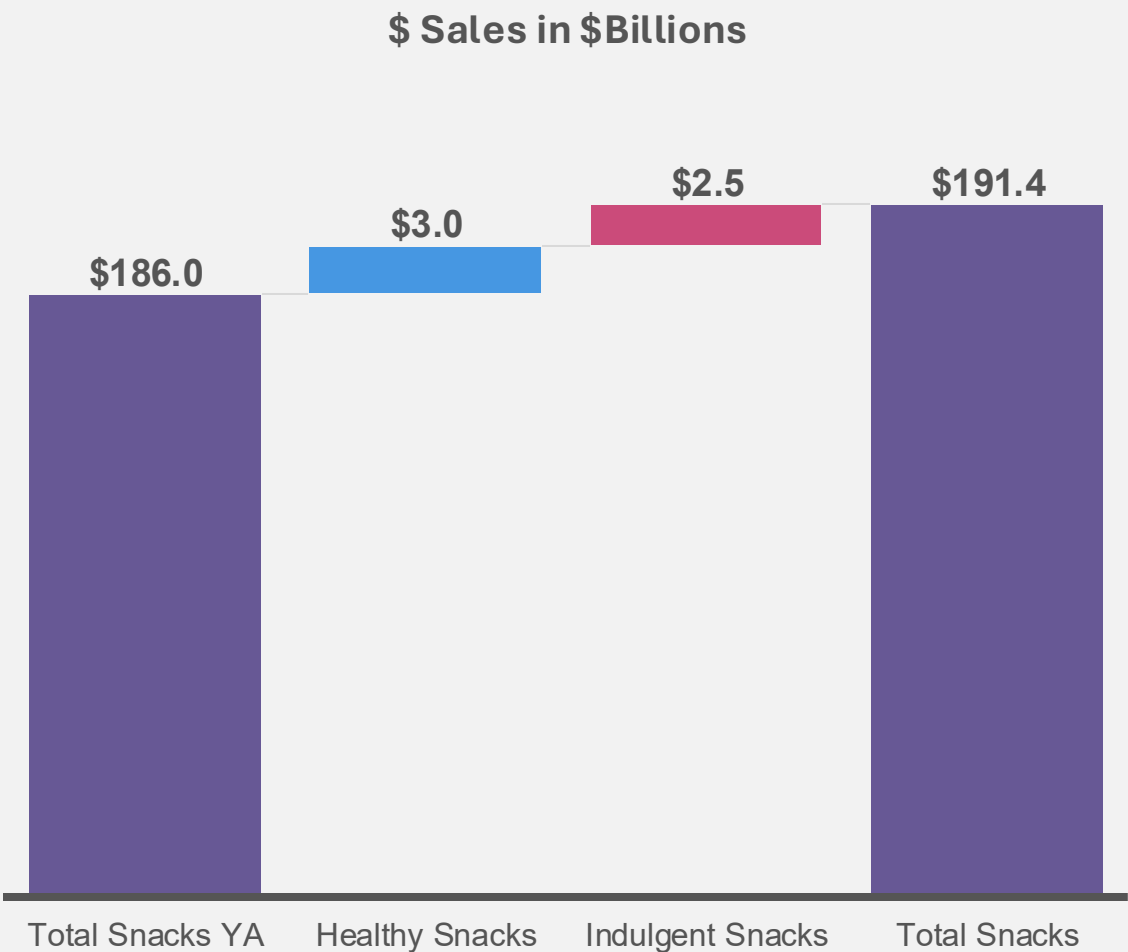
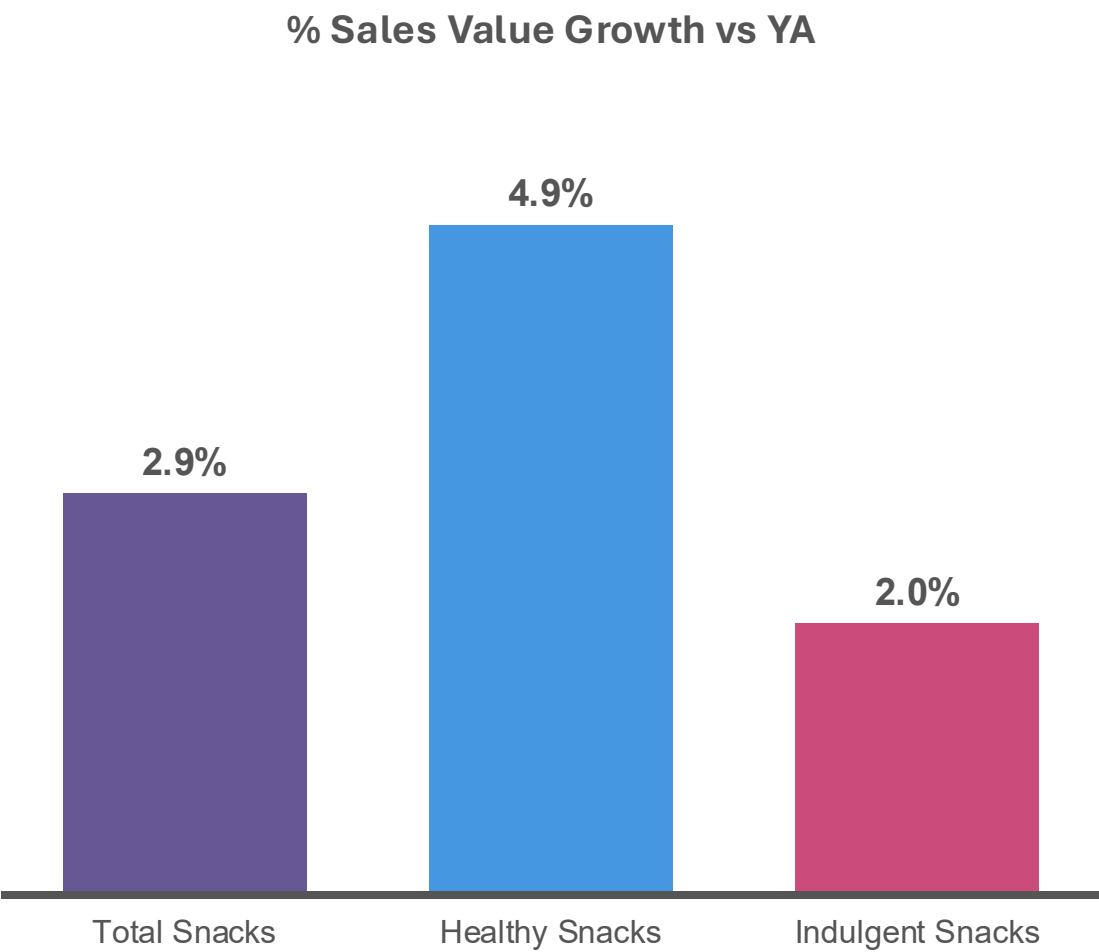
Total Snacking Market is **\$191B** split between Healthy and Indulgent Snacks



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026



Healthy Snacking Is Driving Growth, But Indulgence Remains Essential to Category Expansion



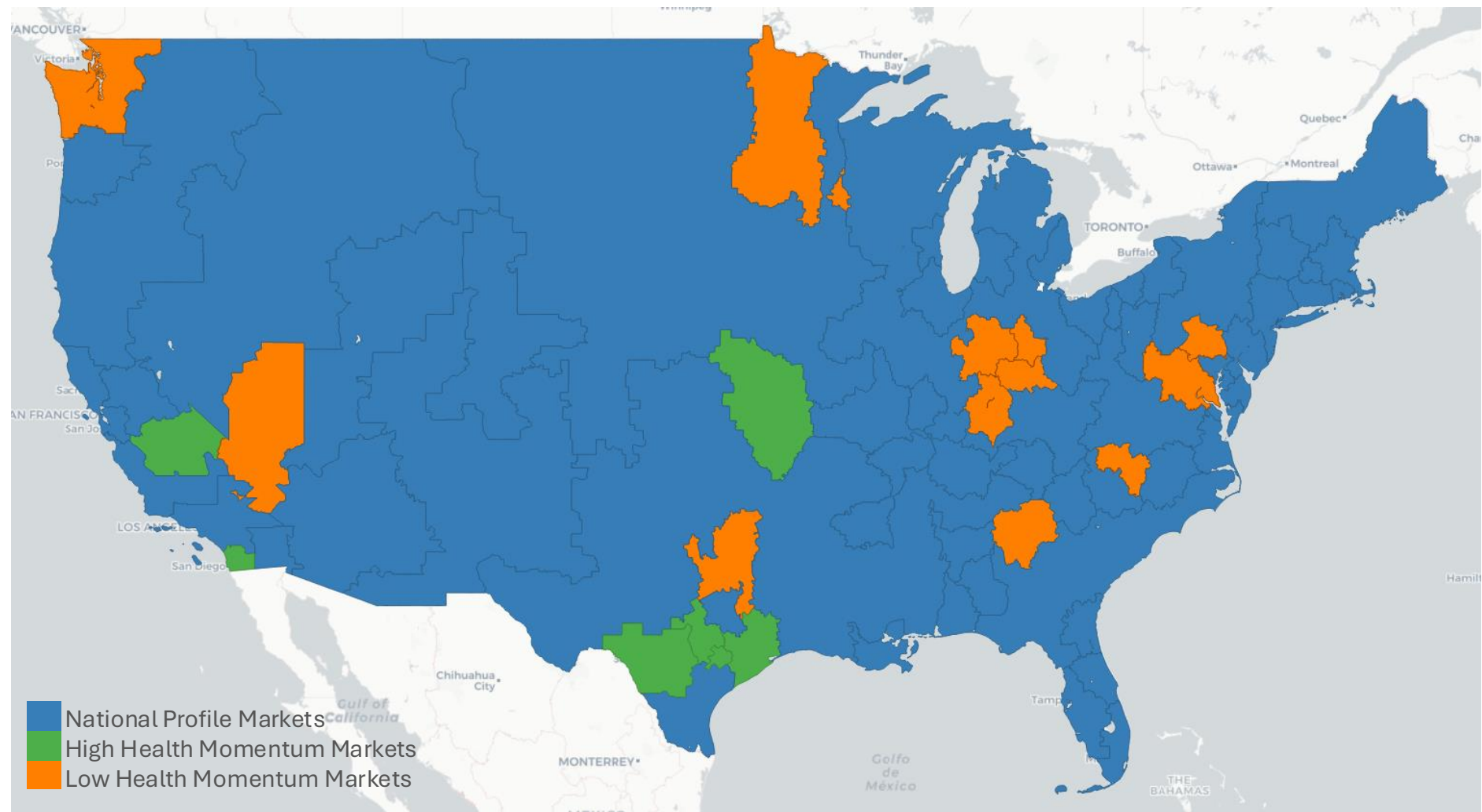
Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

The National Story Is Clear. The Local Story Is Much More Complex.

To understand where future growth will be won, we need to move beyond national averages.

Local Opportunities Begin to Emerge at the Market Level

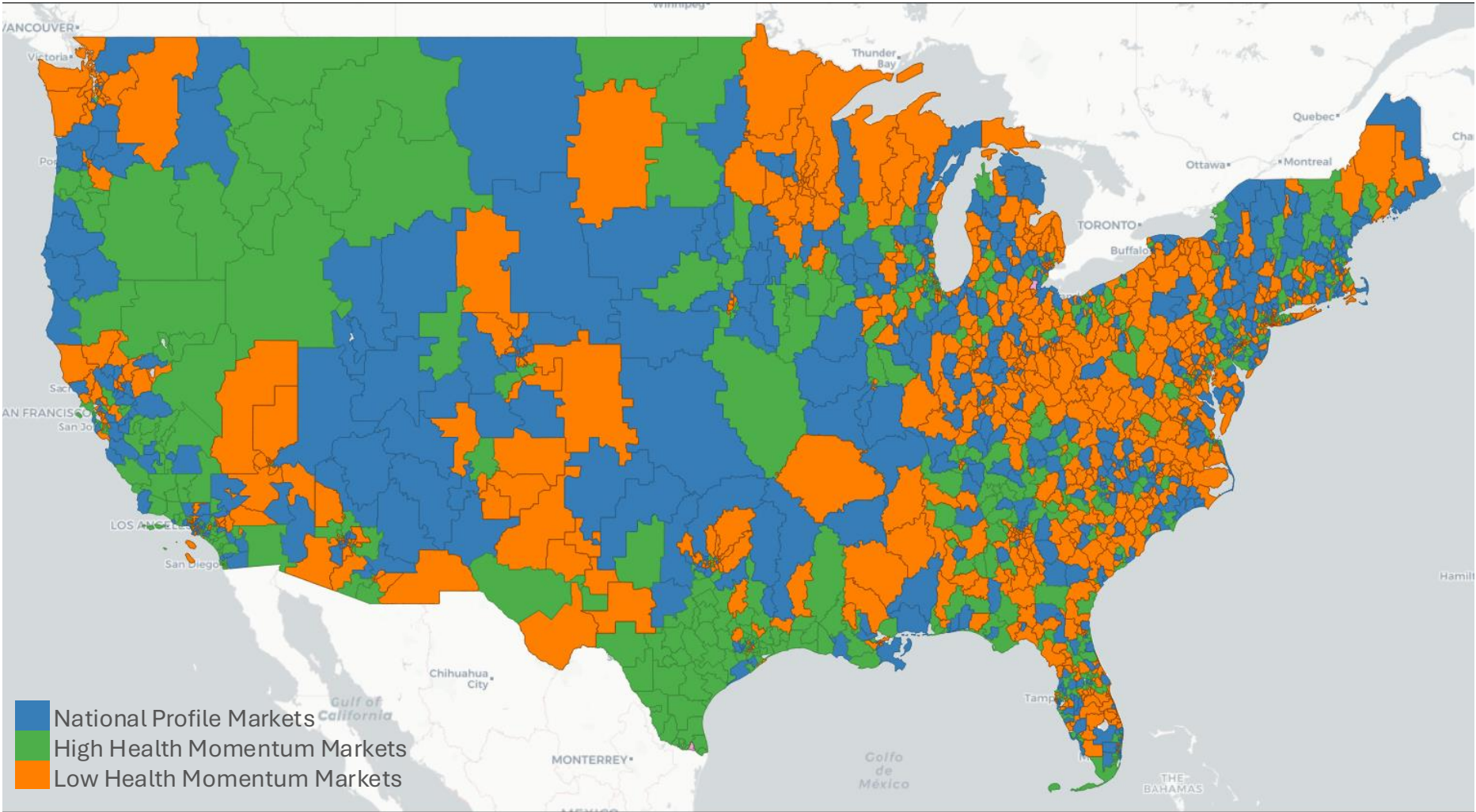
Looking beyond national averages reveals meaningful differences in healthy and indulgent snacking momentum across major US markets,



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

One Category. Three Distinct Market Realities.

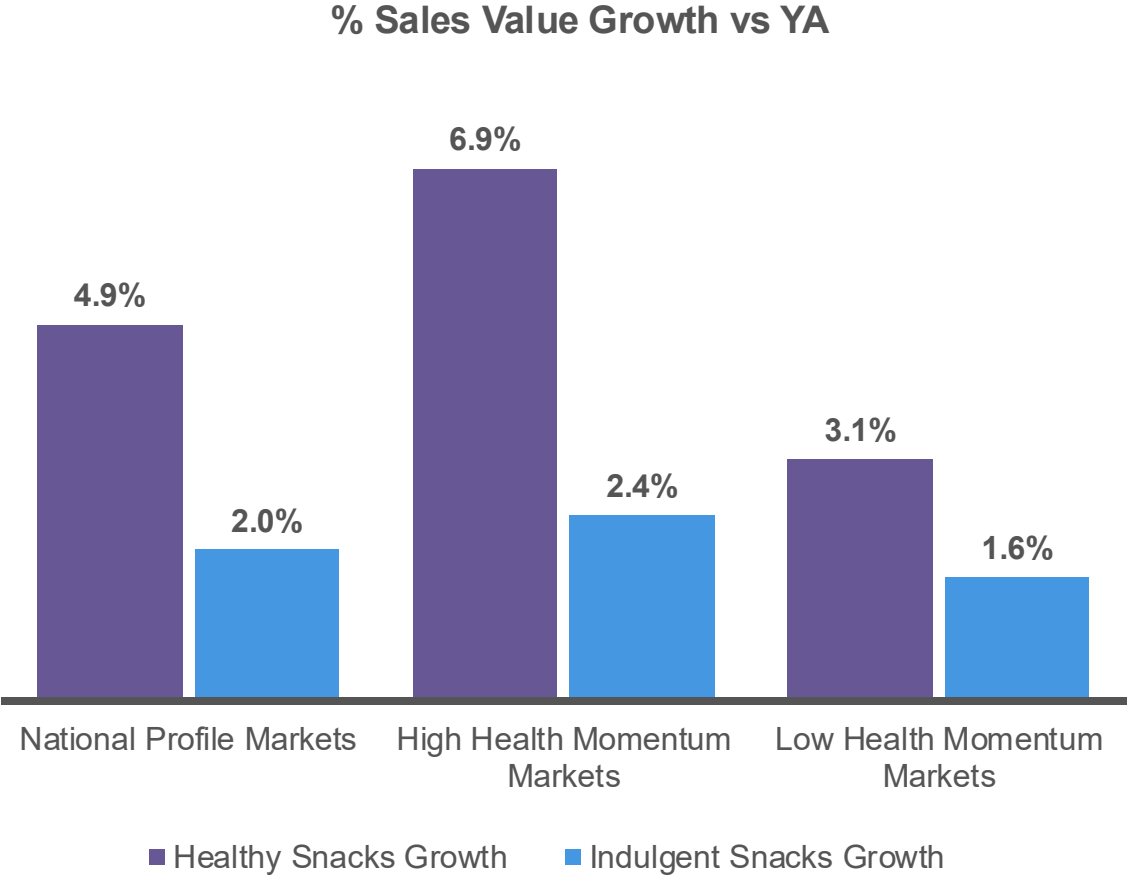
Behind the national numbers lie fundamentally different consumer growth patterns shaping local market performance.



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

Three Snack Economies Are Emerging Across the U.S.

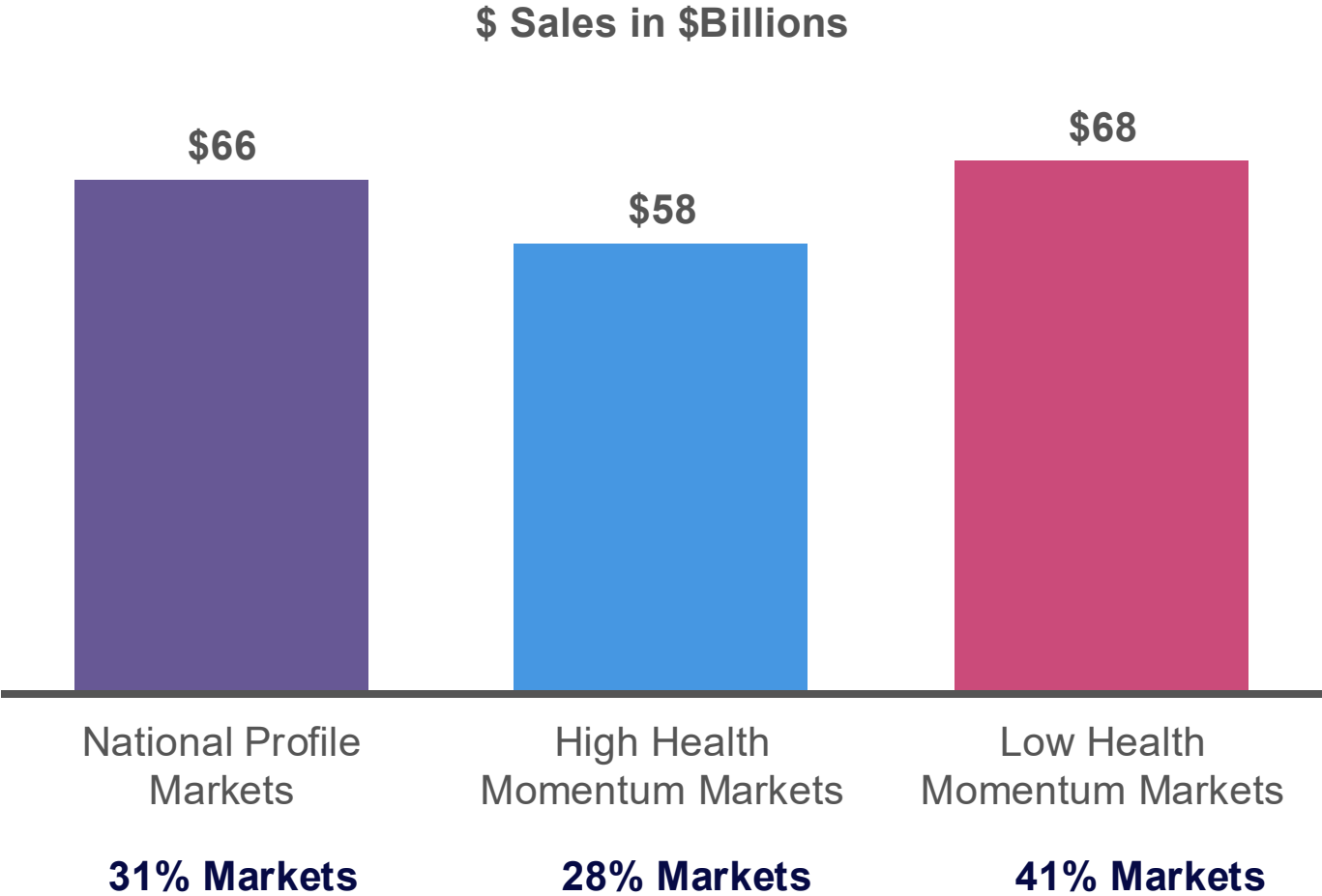
The balance between Healthy and Indulgent growth varies significantly across markets, creating distinct demand ecosystems and growth opportunities.



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

Market Differences Are Not Just Behavioral. They Are Commercially Significant.

Nearly two-thirds of snack sales originate from markets that behave differently than national averages, creating significant opportunities for localized growth strategies.

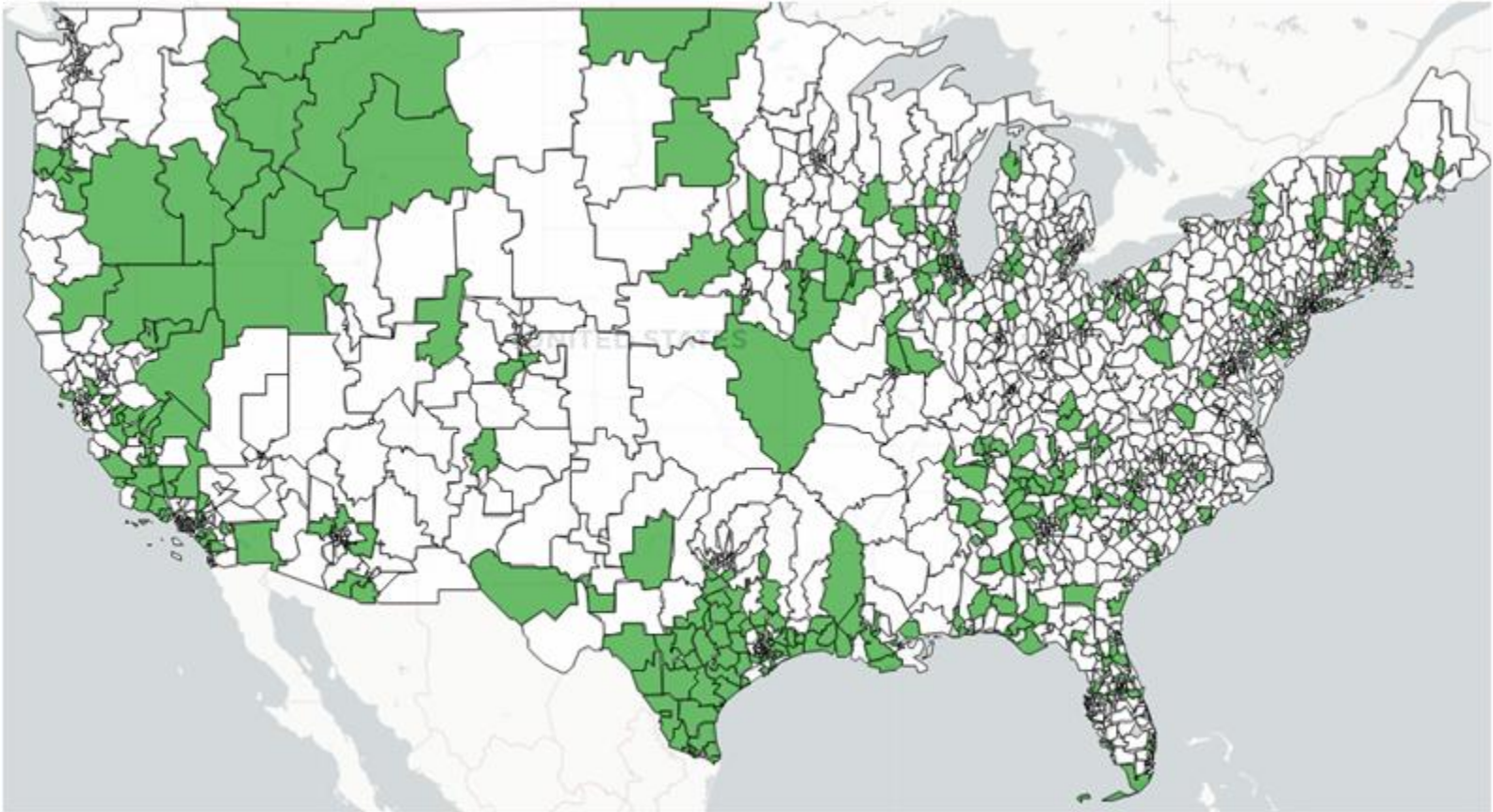


Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

Growth Is a National Trend. Opportunity Is a Local One.

The Biggest Opportunities Are Not Spread Evenly Across Markets.

Markets Where Healthy Snacking Is Winning Fastest



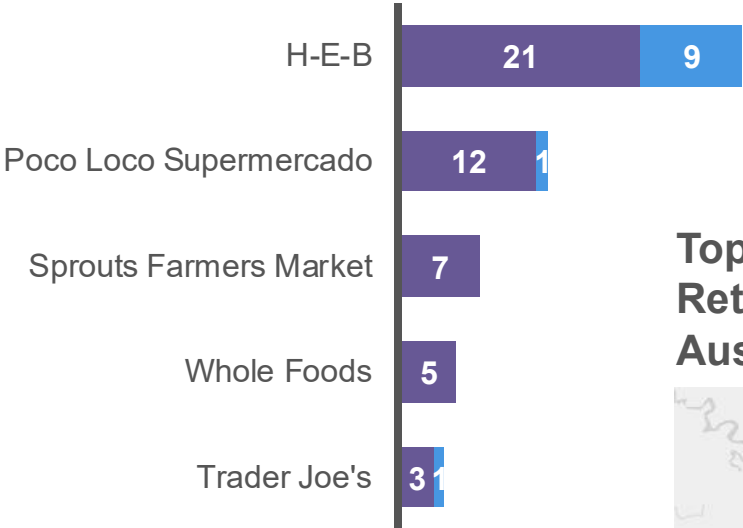
Top 10 High Health Momentum Markets

- TX-Austin
- Kansas City-Overland Park
- TX/NM-El Paso
- NY-New York-Chelsea
- TX-San Antonio
- MT/ID/WY-Billings-Idaho Falls
- TX-Killeen-Round Rock
- MA-Plymouth-Pembroke
- ID/OR-Meridian-Nampa
- SC-Berkeley-Summerville

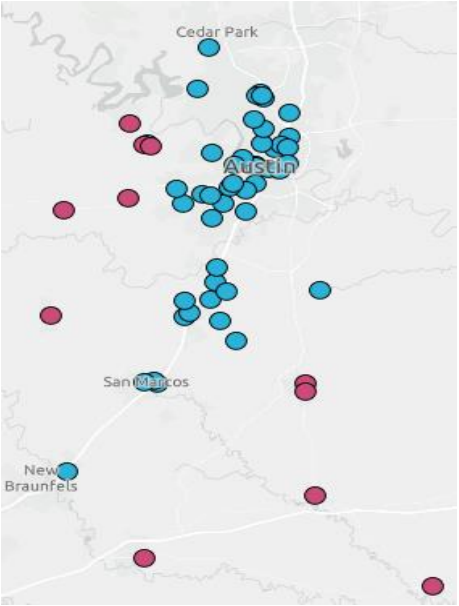
Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

Precision Areas identify where demand exists, while store-level insights reveal where to win

Top 5 Grocery Retailers by store count in Austin Precision Area

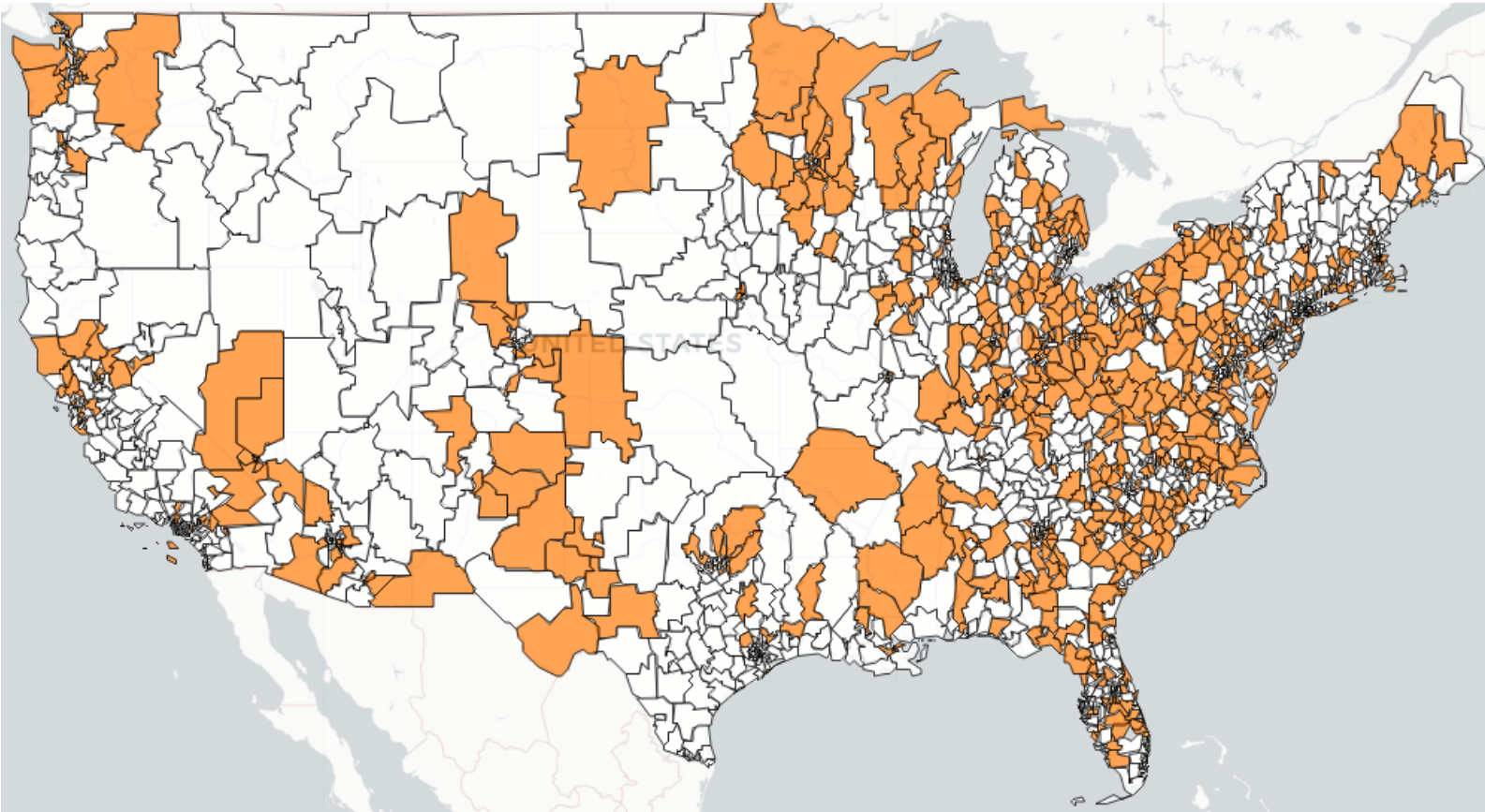


Top 5 Grocery Retailers stores in Austin Precision Area



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026 and Precision Solutions – Grow My Shelf
*Each dot is a Grocery store within a Precision Area | Blue color represents a Demand Index of 100-119 | Red color represents a Demand Index of 0-99

Markets Where Indulgent Snacking Is Winning Fastest



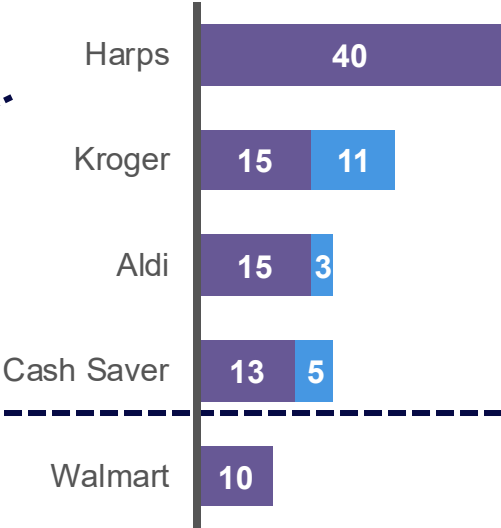
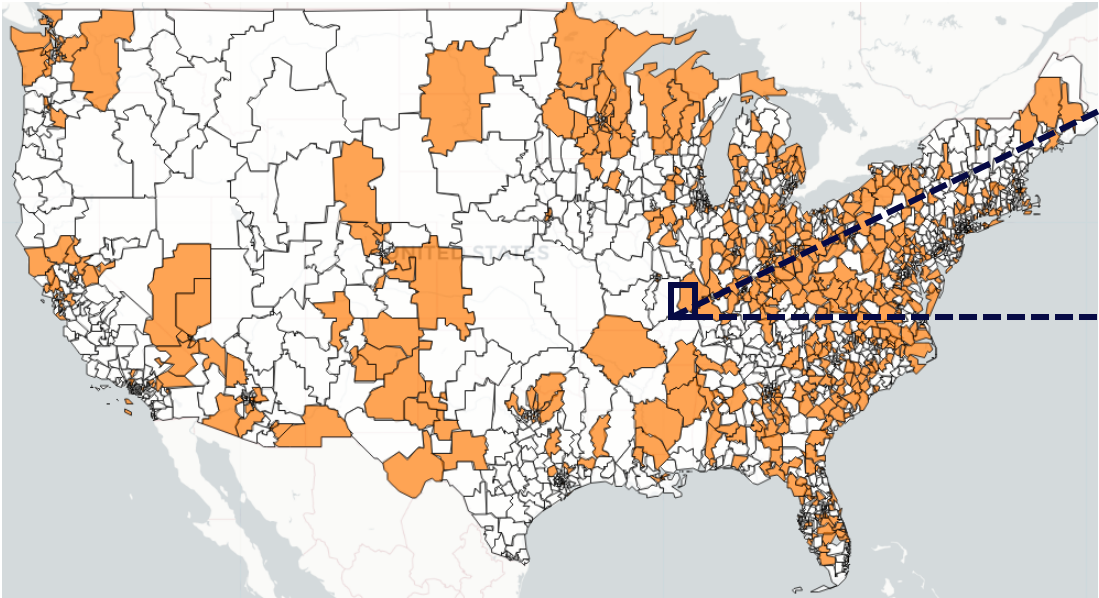
Top 10 Low Health Momentum Markets

- AR/TN/MO-Memphis-Little Rock
- TN/MS-Jackson-Collierville
- MS/LA/AR-Jackson-Madison
- NM/TX-Roswell-Clovis
- TX/OK-Denton-Carrollton
- MA-Needham-Norwood
- NY-Hempstead-Garden City
- OH-Lancaster
- TX-Saginaw
- WI/MI-Wausau-Stevens Point

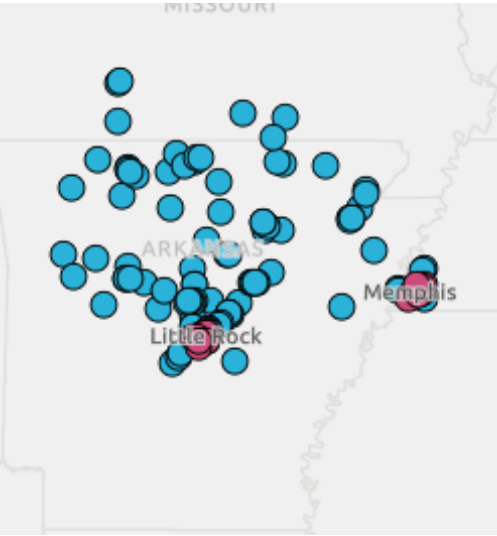
Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026

From national trends to Precision Areas to individual stores, opportunities become clearer as consumer demand is viewed through a more localized lens.

Top 5 Grocery Retailers by store count in Memphis-Little Rock Precision Area



Top 5 Grocery Retailers stores in Memphis-Little Rock Precision Area



Source: NIQ, Precision Solutions – Local Sales Insights 52 W/E 7/18/2026 and Precision Solutions – Grow My Shelf
*Each dot is a Grocery store within a Precision Area | Blue color represents a Demand Index of 100-119 | Red color represents a Demand Index of 0-99

**Opportunity Is Local.
Activation Must Be Local Too.**

Healthy snacking consumer has moved beyond the traditional wellness consumer

More diverse than the average snacker

Healthy snacks consumer over-indexes among multicultural consumers, particularly Black, Hispanic, and Asian households.



Urban demand drives healthy snacking

Healthy snacks consumers are concentrated in urban markets and under-index in countryside markets.



Women are leading healthy snacking adoption

Healthy snacking adoption is disproportionately driven by female shoppers and household decision makers.



Healthy snacking extends beyond affluent consumers

Contrary to common assumptions, healthy snacking over-indexes among households earning under \$75k.



Healthy snacking is being driven by growing families

Healthy snackers over-index among households with children, indicating that healthier snack choices are increasingly being incorporated into family routines and lunchbox occasions.

Source: NIQ, Precision Solutions – Grow My Brand – Attributes Driving Consumption

Indulgent snacking remains deeply rooted in everyday consumer habits

Indulgent snacks consumer reflects the mainstream consumer

Unlike healthy snackers, indulgent consumers closely mirror the overall population, with limited ethnic skew.



Countryside markets over-index for indulgent snacking

Indulgent consumers are more concentrated in countryside markets while urban consumers' under-index.



Broad appeal across genders

Indulgent snacking resonates across both men and women, with a slight over-index among male consumers.



Indulgent snacking is driven by everyday consumers

Indulgent snacking over-indexes among households earning less than \$75K annually and under-indexes among affluent households.



Household composition has limited impact on Indulgent snacks consumption

Unlike healthy snacks consumer consumption pattern that skew toward specific family structures, indulgent snacking performs consistently across households with and without children.

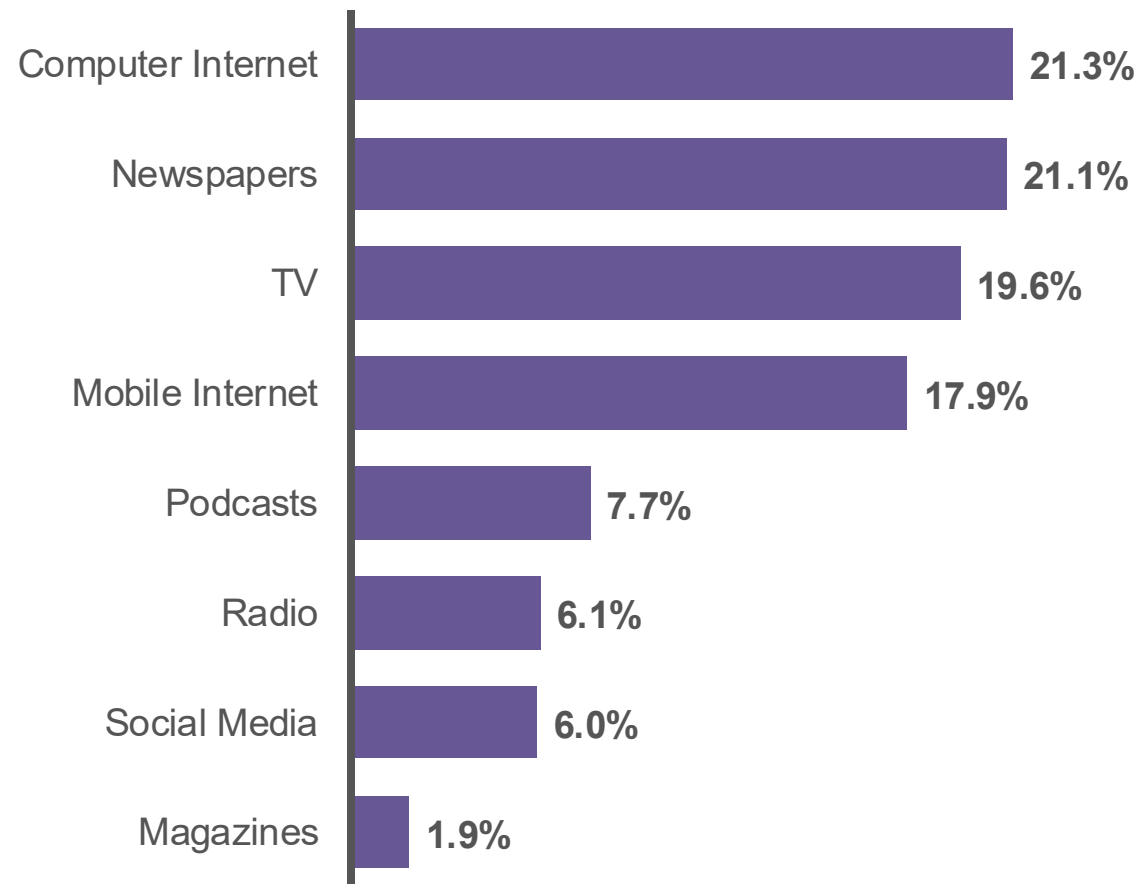
Source: NIQ, Precision Solutions – Grow My Brand – Attributes Driving Consumption

The Path to Purchase Begins Long Before the Snack Aisle

Healthy and Indulgent Consumers Consume Media Differently

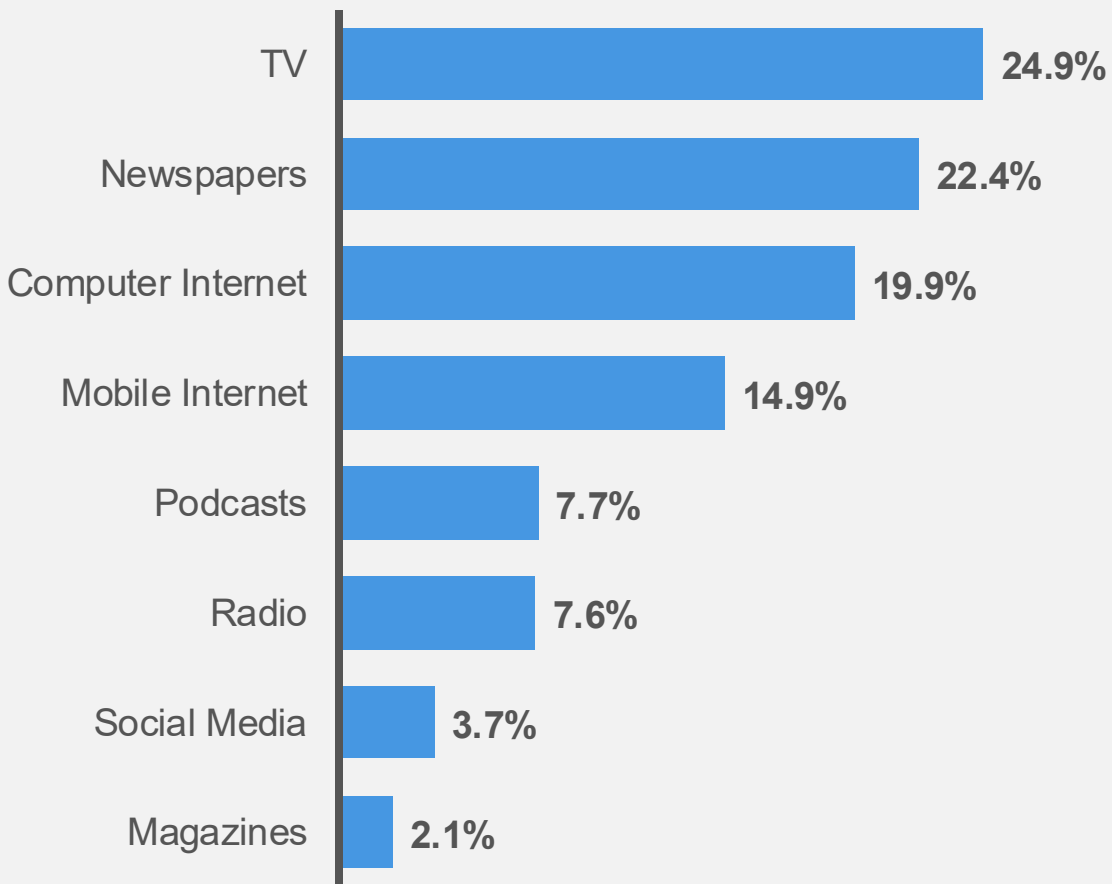
Healthy Snacking Consumer

Target % Penetration by Media Tactic



Indulgent Snacking Consumer

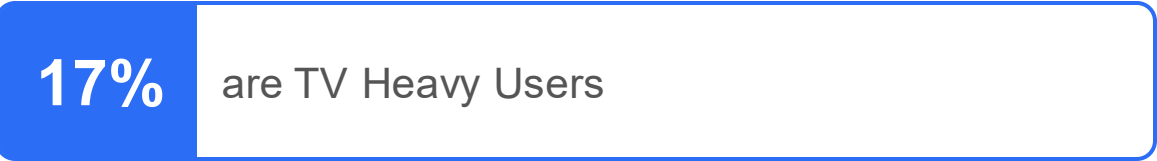
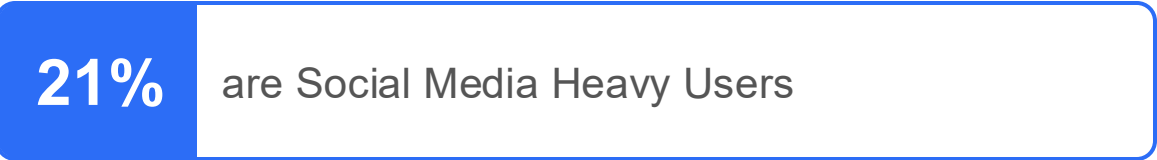
Target % Penetration by Media Tactic



Source: NIQ, Precision Solutions – Grow My Brand – MRI Simmons Doublebase

Different Media Preferences Mean Different Media Tactics

Healthy Snacking Consumer

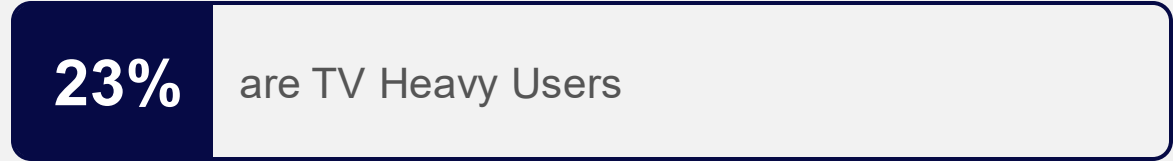
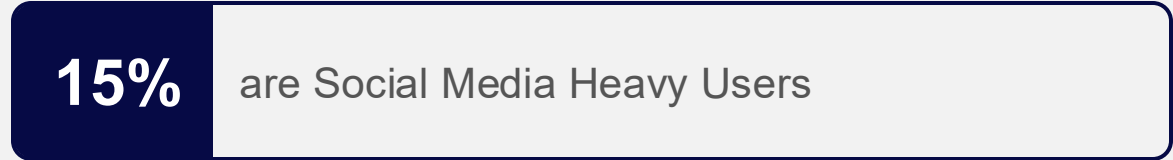


Top Social Media Apps

- LinkedIn
- Reddit
- X
- Instagram

28% follow Sports/Athletes on Social Media

Indulgent Snacking Consumer



Top TV Shows

- Fox News
- 60 Minutes
- FBI
- The Voice

70% say TV is their main source of entertainment

Source: NIQ, Precision Solutions – Grow My Brand – MRI Simmons Doublebase

Consumers Bring Different Beliefs to the Snack Aisle

Health and Indulgent Consumers Approach Wellness Differently

Healthy Snacking Consumer

- I prefer brand-name prescription drugs to the generic brand, even if they cost more
- I prefer brand-name over-the-counter drugs, even if they cost more
- I'm often first to try the most advanced medicines
- I'll pay just about anything when it concerns my health
- I rely on a mobile app to keep track of my fitness habits

Indulgent Snacking Consumer

- Because of my busy lifestyle, I don't take care of myself as well as I should
- I only go to the doctor when I am sick
- When I am sick, I still drag myself to work
- I struggle to pay the costs of health care
- I take advice on health issues from my friends

Different Food Beliefs Shape Different Snacking Behaviors

Healthy Snacking Consumer

- My purchase decisions are influenced by the latest health food trends
- I typically drink wine with dinner
- I try to eat gourmet food whenever I can
- I only buy food items that are name-brand, not generic brands.
- I'll try any new diet

Indulgent Snacking Consumer

- When I eat out, I like to splurge on unhealthy foods
- Fast food fits my busy lifestyle
- I often eat my meals on the run
- Salty snacks are my favorite kind of snack
- If generic brands are on sale, I will purchase them over my normal name-brand

Not All Markets Snack Alike.

Healthy and Indulgent growth are shaped by different consumers, motivations, and occasions. Understanding where these consumers live, shop, and engage is the key to unlocking local growth opportunities.

Wellness vs Reward

Fueling vs Treating

Discovery vs Familiarity

Intentional vs Impulsive

Localize your execution with Precision Solutions

An integrated, all-in-one solution, *powered by the most robust retail and consumer data*. It transforms how cross-functional teams *identify* local opportunities, *test* initiatives in-market, and *optimize* outcomes for confident execution and scalable growth.



Thank you.

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