The End of Pantry Loading: Why CPGs Must Rethink Packaging Architecture for the New American Shopper

The average American household is disappearing, and pack architecture hasn't caught up yet.

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Overview

As household demographics, economic pressures, and health trends reshape consumer behavior of Gen X, Gen Z and Boomers in the United States, traditional CPG packaging strategies centered on upselling, pantry loading, and increased consumption may become less relevant. With smaller and more untraditional households increasing, rising costs of living, and growing adoption of GLP-1 medications influencing purchasing habits, CPG manufacturers and retailers must rethink pack architecture, promotional strategies, and packaging formats to meet the needs of consumers in 2035.

Macro Trends in America: The Shrinking American Household

Household size in the United States has gradually declined as demographic, economic, and cultural trends continue to reshape how Americans live. Although the total U.S. population has grown from approximately 281.4 million in 2000 to around 340.1 million today, the median age has also increased from 35.3 to 39.3, while average household size has declined from 2.6 people to roughly 2.5 people. This reflects a broader shift toward smaller households, delayed family formation, economic pressure, and more varied living arrangements. For package architecture, this matters because packaging designed around larger families, pantry loading, and high-volume consumption no longer matches how many households live, shop, store, and consume products.

A major driver of this shift is the way younger generations approach traditional life milestones. Millennials and Gen Z are getting married, having children, and purchasing homes later in life compared to their Gen X and Boomer predecessors. Marriage, once viewed as a standard marker of adulthood, is increasingly seen as a personal choice rather than a required step. As a result, household structures have become more diverse, with growth in single adult households, unmarried couples, cohabiting partners, roommate households, and families that do not follow the traditional nuclear family model. These households have different consumption needs than traditional larger families, creating a greater need for packaging that is smaller, easier to finish, easier to store, and less financially burdensome at the point of purchase.

These changes are visible in both marriage and fertility trends. The median age of a first marriage has increased to approximately 30.2 for men and 28.6 for women[1], compared to 26.8 and 25.1 in 2000[2]. At the same time, marriage and childbearing have become less closely connected, with 39.5% of newborns now born to unmarried women[3]. Fertility rates have also declined, falling from about 1.9 during the 1970s to roughly 1.6 in 2024[4]. Together, delayed marriage, lower fertility, and more varied family structures are contributing to smaller household units across the country.

This shift is not limited to younger consumers only. By 2035, Gen X will be moving deeper into empty-nester and pre-retirement life stages with adult children leaving home, while Boomers will be older and more likely to live in smaller households due to retirement and aging. At the same time, Gen Z will be in the young adult and family-formation years, but many will likely continue facing delayed marriage, delayed homeownership, and smaller living spaces.

Cultural attitudes around relationships, independence, and adulthood have also evolved. Popular media and digital platforms have helped normalize dating, cohabitation, independence, and nontraditional relationship paths. Shows like Love Island and platforms like Tinder reflect a culture where younger consumers have more choices and may feel less pressure to settle down early. Podcasts, articles, and social media have expanded conversations around independence, evolving gender roles, personal goals, and alternative life paths. While pop culture is not the primary cause of smaller household sizes, it reflects and reinforces broader shifts in how Americans think about marriage, family, and independence. For CPG brands, this means the “average household” is becoming harder to define and design around, and packaging portfolios need more flexibility across household types instead of relying primarily on large, family-oriented formats.

Economic pressure is another important factor in delaying household formation. Younger adults today face higher costs across several major life stages, including weddings, rent, and homeownership. The average cost of a wedding in the United States was $33,000 in 2024[5], making marriage a significant financial commitment for many couples. At the same time, housing costs have increased faster than wages, especially for younger adults who are still early in their careers. Median home prices were $427,000 in December 2024[6], putting homeownership out of reach for many first-time buyers. As consumers spend more on housing and major life expenses, they may become more sensitive to upfront prices in everyday categories. This makes smaller pack sizes important because they can reduce the price per trip, even when larger packs still offer a better per serving price.

Income differences by age further highlight this challenge, with average earnings for 20–24-year-olds at approximately $41,000 per year compared to about $74,000 for adults aged 45 to 54.[7] As a result, many young adults are renting for longer, delaying homeownership, living with roommates, or remaining with their parents for an extended period. In 2024, the average age of a first-time homebuyer rose to 38 years old[8]. The share of adults aged 25 to 34 living with their parents has reached 19% for men and 12% for women[9], while 7.9% of households live with unrelated roommates. These trends lead to young adults facing greater financial barriers to independent living and forming nuclear households than previous generations.

The rising cost of living does not just affect where consumers choose to live. It also shapes what they purchase on a frequent basis. Food at home prices were up 2.7% year over year in June 2026[10], adding pressure to already stretched grocery budgets. This burden is especially heavy for lower income households, where the bottom 20% of income earners spent an average of $5,498 on food, equal to 33% of their pretax income, while households in the middle 20% spent $9,097, equal to 12.2% of pretax income[11]. As grocery costs take up a larger share of income, consumers on a budget become more selective in the store, making smaller serving sizes and lower price point packages more appealing even if the larger servings have better value.

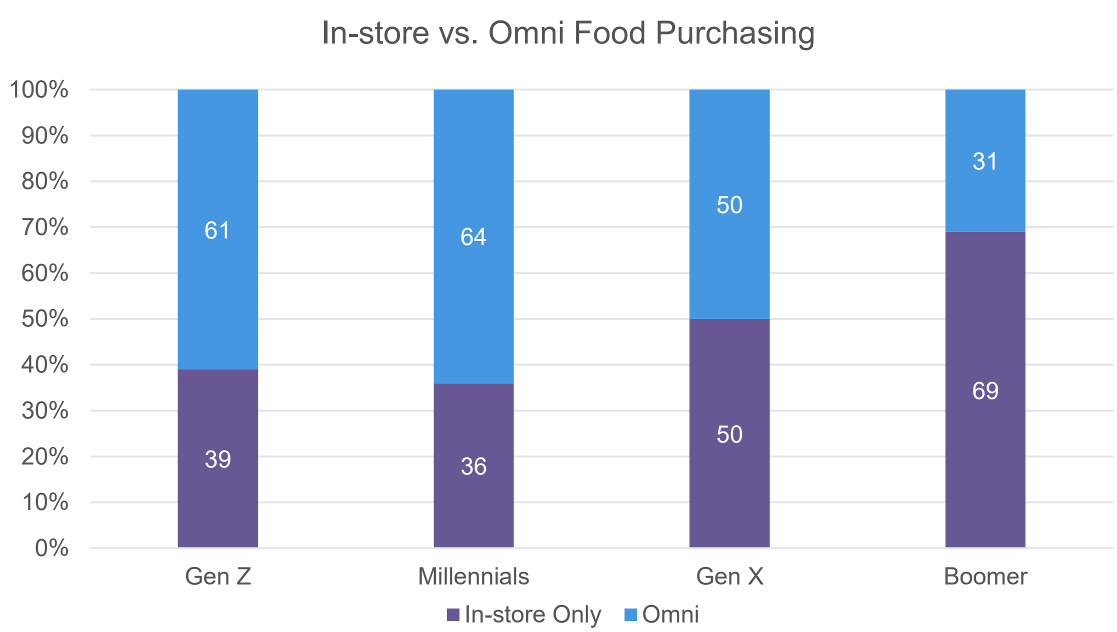
We can't forget about the effect the rise in GLP-1 medications is having on purchasing behavior. These medications change appetite, portion expectations, and food purchasing patterns. As of May 2026, 21% of U.S. households had at least one GLP-1 user, with adoption continuing to grow each year as they become more accessible. While diabetes management remains relatively steady across income levels, GLP-1 usage for weight loss is more apparent among higher-income households.

For food and beverage categories in particular, GLP-1 adoption challenges the traditional growth model of encouraging higher volume and larger consumption occasions. Smaller packs, mini cans, portioned servings, trial sizes, and formats that preserve freshness can help brands remain relevant with consumers who are not completely abandoning categories entirely but are changing what, how much and how often they consume. If the American household is shrinking, the way it shops is shrinking right along with it.

The Mission Replaces the Cart

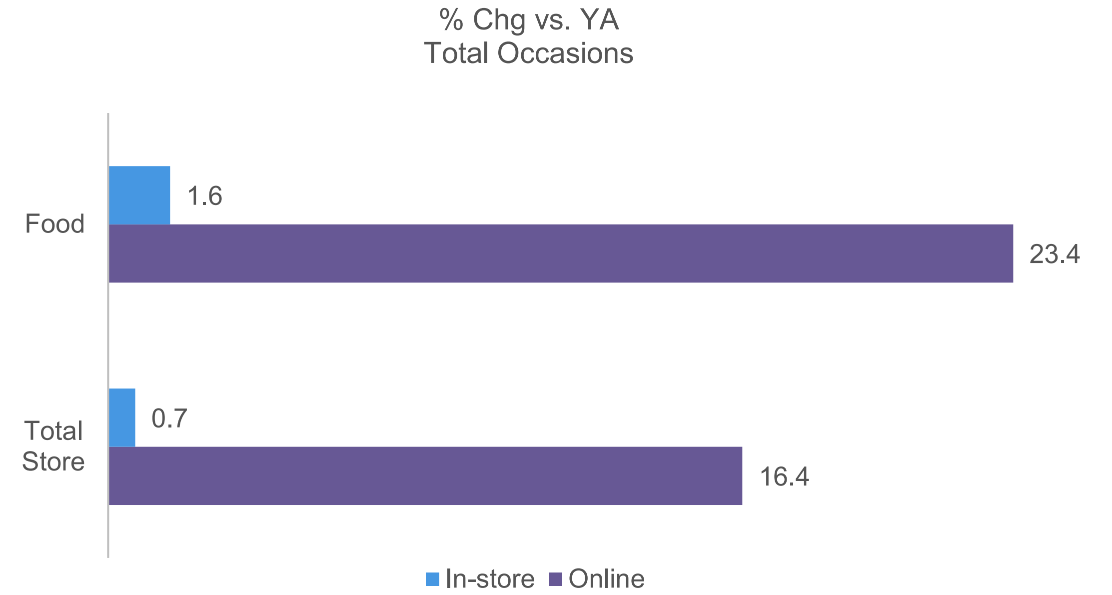
Shopping behavior in America is shifting away from one-size-fits-all purchasing and toward more flexible, mission-based shopping. Consumers are still shopping in stores, but younger generations are increasingly blending online and in-person purchasing, while quick trips and fill-in trips are becoming more common than traditional stock-up behavior. Shopping occasions that are more frequent, more intentional, and often smaller are already being observed in NIQ data. This supports the idea that companies should focus more on smaller package size promotions that appeal to convenience, affordability, and align with today's shopping missions.

In-Store vs. Online and the Generational Divide



Source: NIQ Category Shopping Fundamentals Fall 2025 [12]

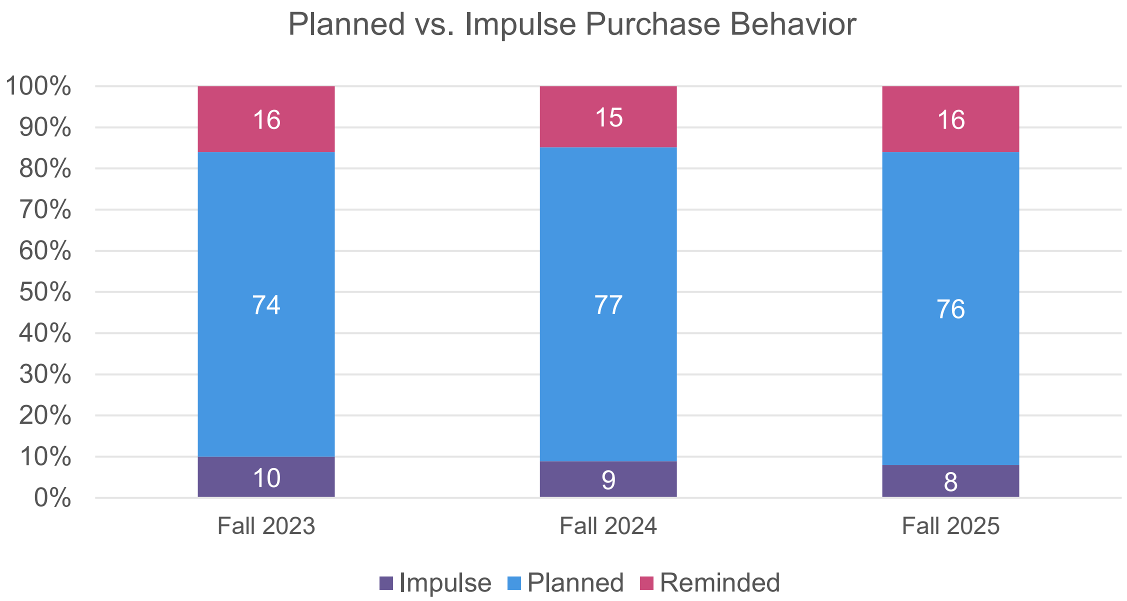
While in-store shopping remains the dominant purchasing option overall, it has been declining over the past several years. This is especially apparent with Gen Z as only 39% of consumers purchase only in-store and instead opt for a hybrid purchasing system of both online and in-person. On the other hand, Boomers are continuing to dominate in-person purchasing with 69% buying only in-store.



Source: NIQ Omnishopper Panel L52 ending 7/11/26 [13]

These generational splits matter because it shows that pack architecture needs to work across different shopping environments. For Boomers, who are more likely to shop in-store, packaging still needs to be easy to recognize on shelves, simple to compare, and convenient to carry home. For Gen Z and other hybrid shoppers, packaging needs to work well in digital environments, where shoppers may make quicker decisions based on images, price points, ratings, convenience, and delivery or pickup options.

Planned vs. Impulse. Who's Really Shopping the List?

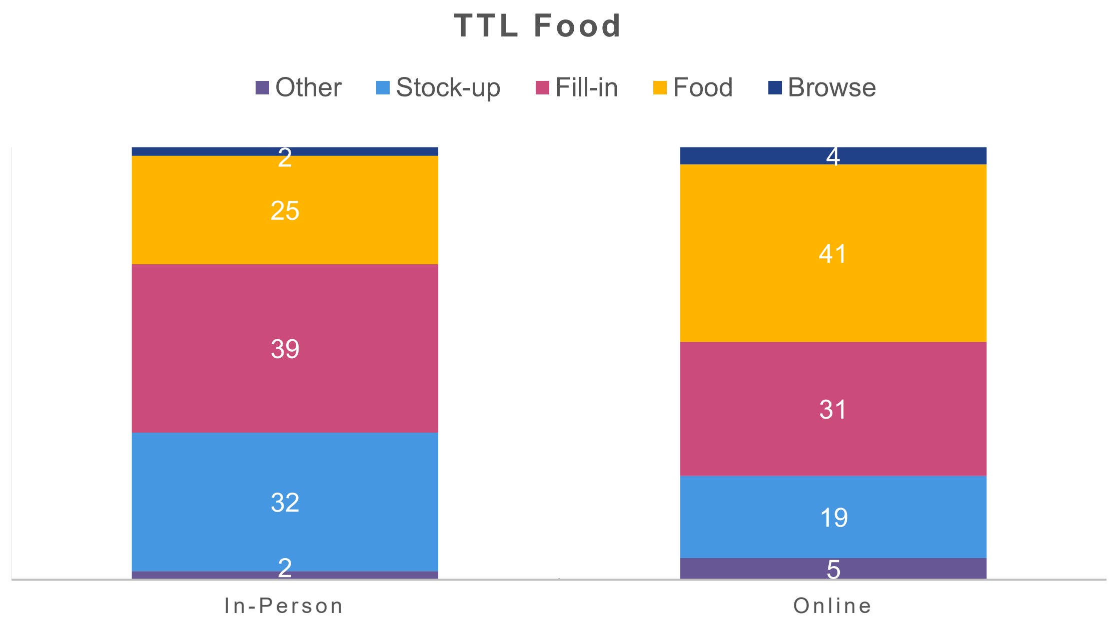


Source: NIQ Category Shopping Fundamentals Fall

We often think impulse purchasing makes up more occasions than they do. Some brands almost completely rely on an impulse buy from shoppers, but what most manufacturers are trying to do with their trade promotions is get on the shopping list or remind a shopper during their shopping trip of an item they may have missed in their planning. This speaks to the influence online and offline promotions still have.

Generational differences play an important role too, as Gen Z has a higher share of reminded purchases at 24%, suggesting that younger shoppers may be more open to noticing products, less inclined to shop with lists, react more to promotions, or add items to their baskets that they did not originally plan to buy. Boomers, on the other hand, show stronger planned behavior at 81%, which points to more established shopping routines and refiling familiar products.

The Decline of the Stock-Up Trip

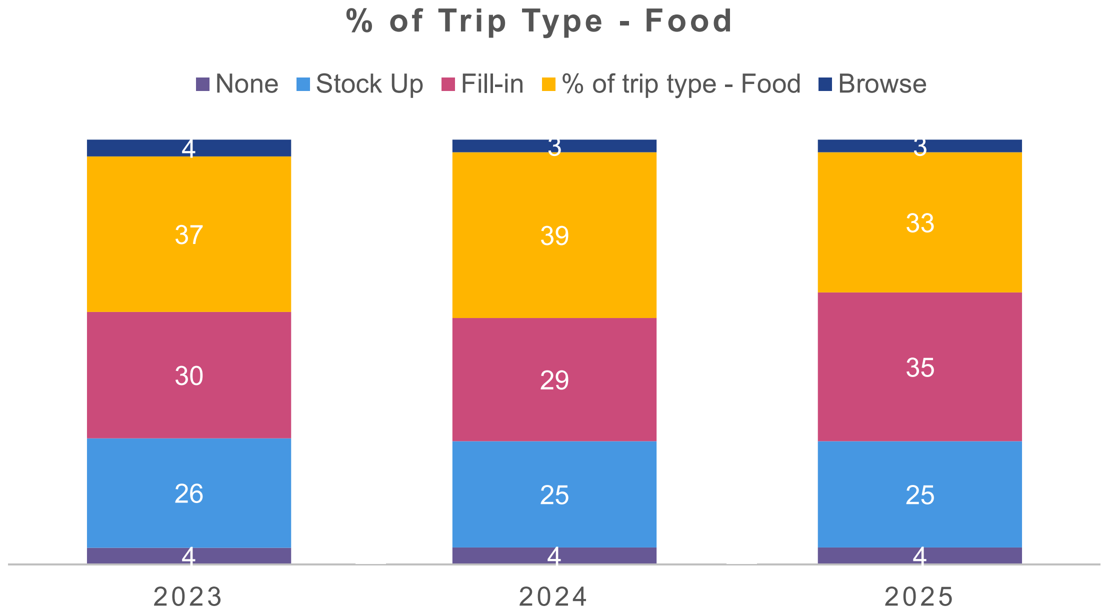


Source: NIQ Category Shopping Fundamentals Fall 2025[12]

Quick and fill-in trips make up most of the grocery trips. Only 32% of in-person trips are considered stock-up trips and this shrinks considerably when the trip is online. Online purchasing is more heavily tied to quick, in-and-out purchasing because it makes restocking a few items fast and convenient. Shopping this way is a “stream of consciousness” as needs are remembered or as things run out. Mobile devices put brands and retailers at the “zero moment of truth” at precisely the time the consumer is thinking about needing more product.

However, when customers take the time to physically go in-store, they are less likely to waste that trip on only one or two items. Instead, they use the visit to purchase several needed items at once, making the trip feel more worthwhile and reducing the need for multiple store visits.

While stock-up trips still represent 25% of food purchases overall, they are not the dominant trip type, which points to a structural shift away from traditional pantry-loading behavior.

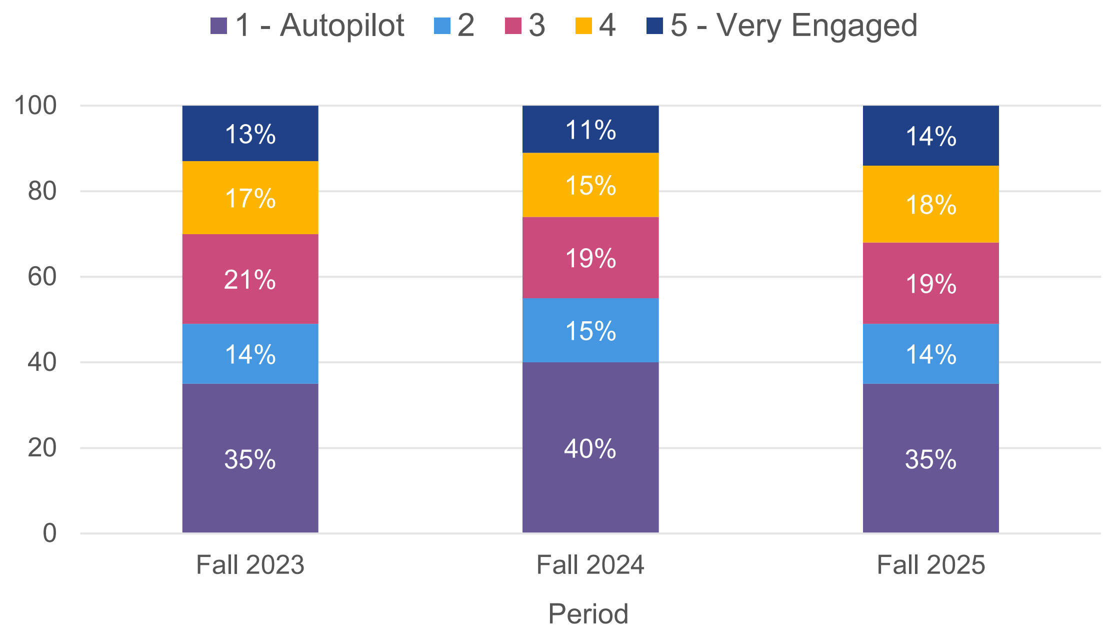


Source: NIQ Category Shopping Fundamentals[12]

Instead, shoppers appear to be making more frequent, need-based trips focused on convenience, replenishment, and managing only what they need now. In fact, growth is happening in the fill-in trip at the expense of quick in and out trips. This activity will continue to grow as more shoppers adopt an “across the market” kind of shopping activity. What’s meant by across the market is the activity of using online resources to find the best price or buy items that might have been out of stock on their in-person store visit more efficiently. All this points to the potential for changing packaging trends.

More shoppers are considering sustainability and waste reduction practices when purchasing. In fact, 28% of shoppers according to an NIQ survey in January 2026 indicated they are actively using waste reduction practices when purchasing items. These practices range from picking products that use sustainable packaging to purchasing only sizes and quantities of products that they know they can fully consume before they expire or go bad. Items that support this need are smaller, easier-to-carry, and more purpose-driven pack formats that fit quick missions and fill-in occasions. Larger packs may still play a role for stock-up shoppers, but the overall trend suggests brands should not rely solely on trade ups and bulk value.

Level of Engagement: Autopilot vs. Attention



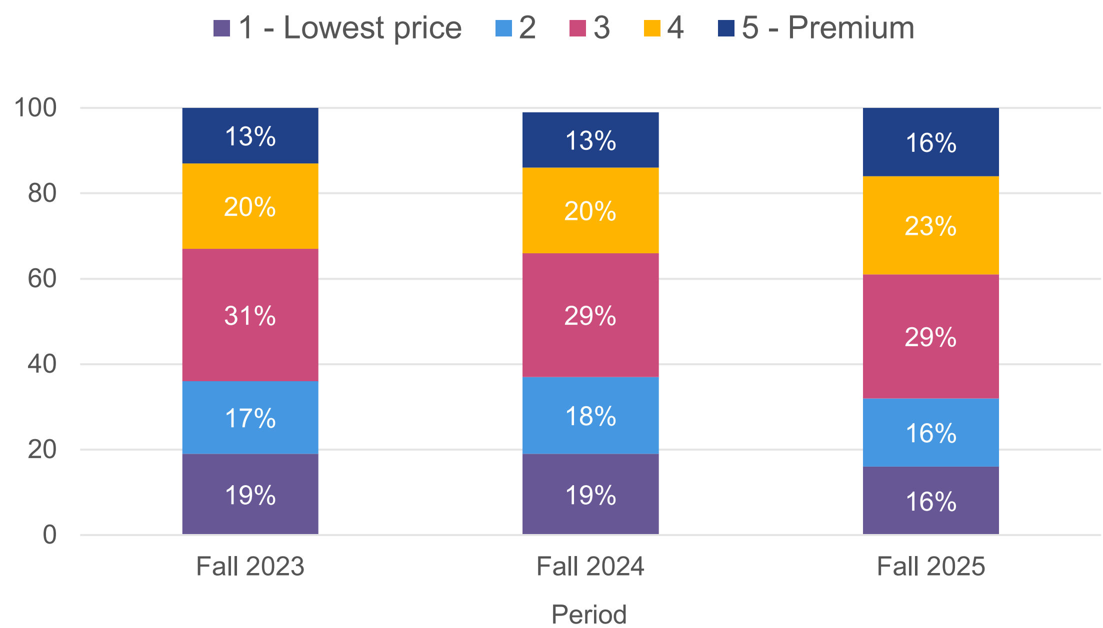
Source: NIQ Category Shopping Fundamentals[12]

Level of engagement with categories fluctuates from year to year depending on macro-economic factors and affordability concerns, but longer-term changing demographics play a structural role. While across the store roughly 35% of shoppers are shopping on autopilot, the other 65% are moderately to highly invested in their category decisions that fill their shopping baskets. But these metrics can change dramatically based on the category and generation. This is especially true for Boomers, where 47% shop on autopilot, pointing to more established buying patterns and a preference for quick, efficient decision-making. For these consumers, packaging needs to be easily recognized, simple to understand, and clear enough to support fast choices.

Gen Z shows a different pattern, with only 24% shopping on autopilot. This suggests that younger shoppers may be more open to discovering new products, comparing value, and responding to claims or branding at the point of purchase. This can make smaller formats especially useful because they can act as lower-commitment entry points for shoppers who are still exploring brands, sizes, and product benefits.

For consumers struggling financially, they are more likely to be more engaged while shopping. 57% of struggling consumers are moderately to highly engaged in their purchase decision, while 55% of affluent shoppers are on autopilot. This shows that lower income shoppers are more intentional with what they are buying due to limited budgets. Smaller packaging that is less expensive would be more appealing to this demographic to fit a greater variety of products into their budget and make it less of a burden to try new things.

Redefining Value in a Balanced Way
Price vs. Quality



Source: NIQ Category Shopping Fundamentals[12]

The price versus quality data suggests that shoppers are defining value in a more balanced way. Value traditionally sits at the intersection of unit price and product attributes that are important to the shopper. The largest share of consumers tends to fall in the middle of the scale where shoppers appear to be weighing affordability against whether the product still feels useful, convenient, and potentially worth the price premium. This challenges the idea that value should be communicated only through larger pack sizes or the lowest unit price. Smaller packages can create value in a different way by lowering the upfront cost, improving storage of the items, reducing the risk of waste, and better matching the amount a shopper needs based on what they know they will fully consume. It’s a compelling theory, but does the data on store shelves actually back it up?

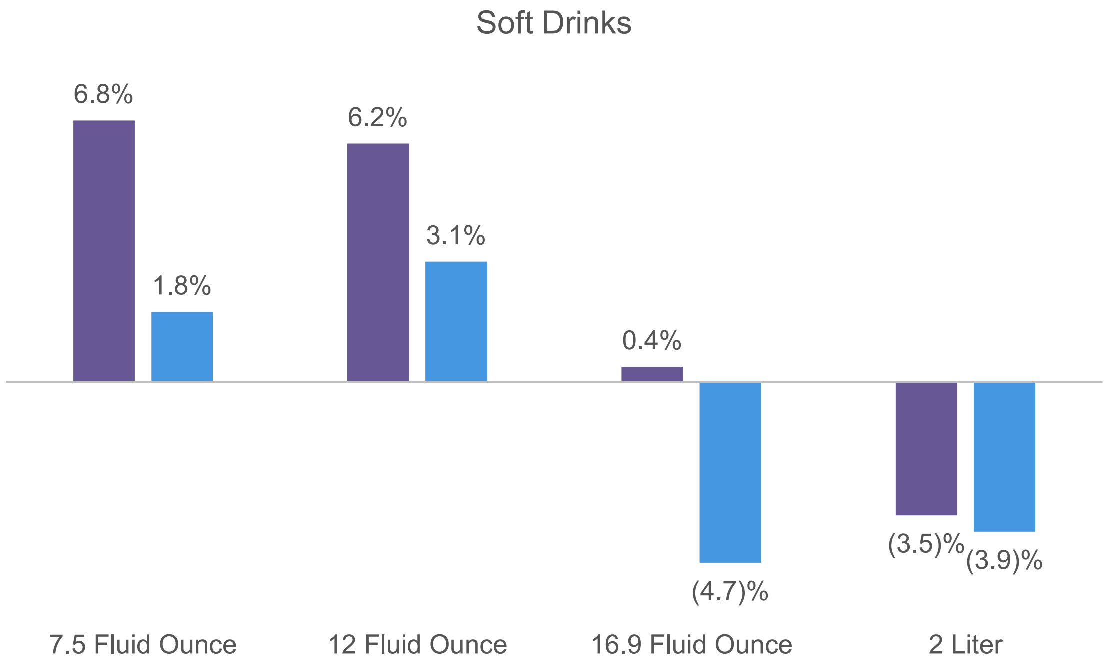
The Data Behind the Shift

We are going to look at 3 category examples where smaller sizes are growing over the more traditional multi-serve packs. These are just a handful of examples that are happening across the store, but this activity is building in many established categories right now. The structural change that has been discussed so far isn't just a point of view, it is showing up in NIQ point of sale data already.

Soft Drinks: Room for Both Big and Small

The soft drink market is still dominated by 12 packs of 12 fl. oz beverages with continuous growth in sales over the last few years. This shows that traditional stock-up formats still have an important role, especially for households that buy soft drinks for multiple people, frequent consumption occasions, or planned replenishment. However, there has been a massive growth of 7.5 fl. oz sizes. 10 packs of 7.5 fl. oz is the third highest selling pack in 2026 with a 14.7% increase from 2025, a 19.5% increase from 2024 to 2025, and a 20.5% increase from 2023 to 2024.[14]

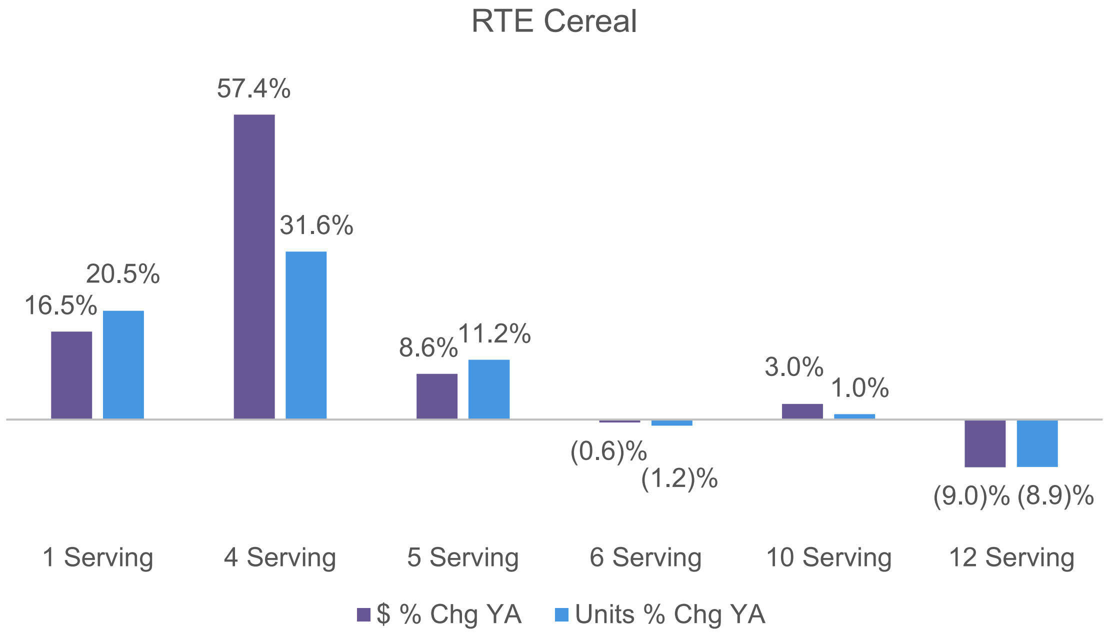
This growth suggests that consumers are not only buying soft drinks in traditional full-size formats, but they're also responding to smaller, more portion-controlled options that better fit changing consumption habits. Mini cans appeal to smaller households, consumers trying to moderate sugar or caloric intake, using as mixers, GLP-1 users with reduced appetite, and shoppers who want the experience of a soft drink without committing to a full 12 fl. oz. serving. The success of 7.5 fl. oz. formats shows that smaller sizes can create value without replacing larger packs entirely. Instead, they expand the portfolio by giving consumers more choice across occasions: larger 12-packs for stock-up and household sharing, and smaller mini-can packs for portion control, trial, convenience, and reduced waste.



Source: NIQ RMS Data L52 weeks ending 8/8/26[14]

Ready-to-Eat Cereal is Splitting in Two

The RTE Cereal category shows a clear split between smaller and larger serving-count formats. Package sizes with 1, 4, and 5 servings are increasing, while larger 6, 10, and 12 servings are decreasing. This suggests that consumers are shifting away from larger pantry-loading formats and toward smaller, more manageable package sizes that better fit current household needs. The growth of 4 and 5 servings sizes stands out because it suggests that consumers are responding better to more manageable pack sizes. Again, the appeal to smaller households and portion control are driving this trend as well as the desire to reduce the risk of waste and potentially add more variety. Larger 10 or 12 serving packages may offer more product, but it may not feel like the better choice if it doesn't appeal to shopper's values and sentiment toward waste and complete product consumption.

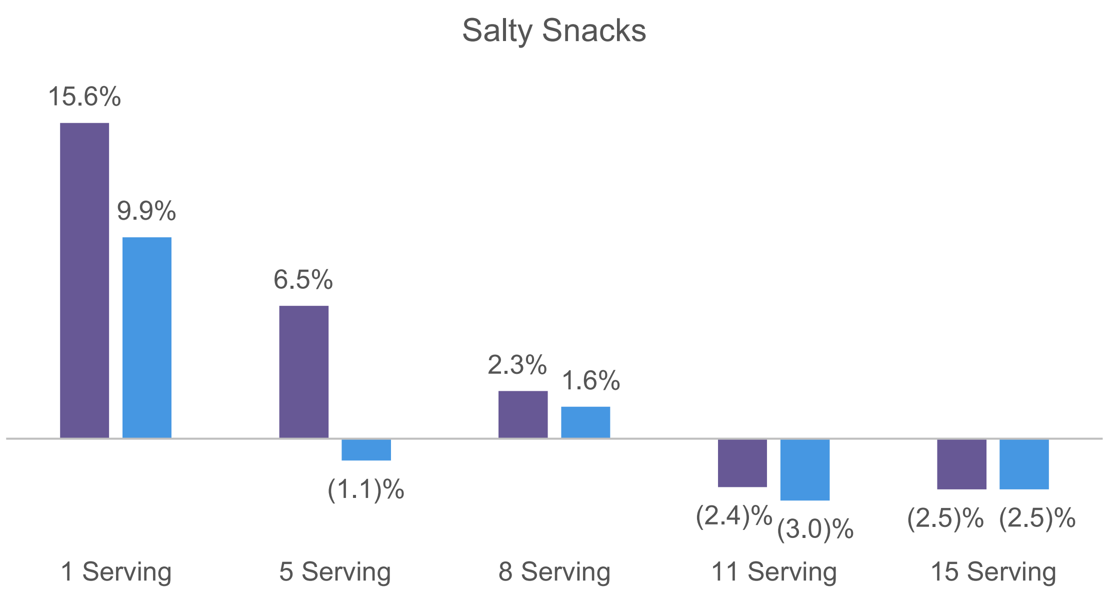


Source: NIQ RMS Data L52 weeks ending 8/8/26[14]

Portion Control Wins in Salty Snacks

The salty snacks category shows growth in smaller and medium serving count formats, with 1, 5, and 8 serving packages increasing while larger 11 and 15 serving packs decreasing. This suggests that consumers are shifting toward pack sizes that better match immediate needs and portion control.

The increase in single serve packages points to the importance of convenience and portability. Single serving salty snacks work well for quick consumption occasions, lunchbox use, trial, impulse buys, and consumers who want a controlled portion. Three categories, one consistent indicator: smaller is no longer the exception. It's the direction.



Source: NIQ RMS Data L52 weeks ending 8/8/26[14]

There Is No More "Average"

Through this analysis we've explored how the shopper is changing and the emergence of a structural change in both the market and in US households. Shoppers literally have the entire marketplace at their fingertips with their mobile devices and are not beholden to one distribution channel for their CPG and food needs. This alone is cause for rethinking how shoppers interact with our brands. The aggregation point of assortments has shifted from retailer's shelves and baskets to the shopper's front porch. Running in parallel is a major demographic shift where 2+ person households are being owned by the Millennial generation and Gen Z, Gen X and Boomers are living or transitioning to dual or single person households. To put it in perspective, the sum of these three generations, excluding younger than 18 years old for Gen Z is approximately 259 million people, a little more than 75% of the US population.

To be clear, Gen Z isn't hopelessly stuck living in smaller households. As an industry we need them to start families, buy houses and do all the other things that make them valuable consumers. They'll simply become valuable later than the generations before them.

Finally, there is no longer an "average" family target to go after. We've spent decades promoting and creating pack sizes that encourage up-selling the consumer, but the consumer has structurally changed. And let's not forget: Gen Alpha is already showing purchasing behaviors that continue what we've seen so far from Gen Z. Redefining value and how your brands fit is pivotal to succeeding with consumers who are interacting with the market differently than anything we've seen historically. Technology and attitudinal shifts are driving this exponential change right now. 2030 is a pivotal year because all of Gen Z will be over 18. By 2035 successful brands will have developed to meet not only an established Gen Z shopper, but a Gen X that will be 55+ and joining their Boomer friends in becoming smaller households fully. How your pack architecture, promotion structures, and value propositions speak to these consumers is something to think about right now, so you're evolving right alongside this massively shifting shopper landscape.

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With operations in more than 90 countries, NIQ covers approximately 82% of the world's population and more than $7.4 trillion in global consumer spend. Through cloud-based platforms, advanced analytics and AI-driven insights, NIQ delivers The Full View™—helping brands and retailers understand what consumers buy, why they buy it, and what to do next.

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