

COMING UP NEXT



Sweet Seasons: Unwrapping Trends in Seasonal Candy

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Circana



Sweet Seasons: Unwrapping Trends in Seasonal Candy

May 2026





- Macroeconomic Trends and Top Line Performance
- Seasonal Trends
 - ✓ Halloween 2025
 - ✓ Winter Holiday 2025
 - ✓ Valentine's Day 2026
 - ✓ Easter 2026
- Holiday Clash 2027
 - ✓ Super Bowl/Valentine's Day

Macroeconomic events are impacting consumer spend

High prices and the labor market remain key pressure points reported by consumers



Headwinds

Income Strain

- Compounded inflation outpaces wages
- High debt with credit card and student loan balances rising and higher delinquency rates
- SNAP changes
- ACA subsidy changes
- Increasing gas prices

Tightening Labor Market

- Unemployment stable; job growth slowing
- Slowing wage growth, even more so for low earners

Uncertainty Remains

- Global conflicts
- Low consumer confidence



Tailwinds

Economic Relief

- 2026 tax refunds
- Inflation easing
- Mortgage rates lower than YA

E-Commerce Growth

- E-Commerce and social commerce grow
- AI provides personalized shopping experiences

Wellness Prioritized

- Strong demand for functional foods, supplements, personal care, and better-for-you formulations
- Preventative and lifestyle-based care shows renewed focus on hobbies and experiences
- Desire for newness and little luxuries drives innovation

U.S. consumers face mounting economic pressure, driven by global conflict



Unemployment Rate

4.3%
March 2026



+0.1 pts
vs. YA
-0.1 pts
vs. Feb '26



Inflation

3.3%
March 2026



+0.9 pts
vs. YA
+0.9 pts
vs. Feb '26



Household Debt

\$18.8T
Q4 2025



Total +1.0%
vs. Q3 2025
Credit Card +5.5%
vs. YA



Gas Prices

\$4.25*
April, 13, 2026



+\$0.95
vs. YA
Flat
vs. Week Ago



Consumer Sentiment

47.6
April 2026

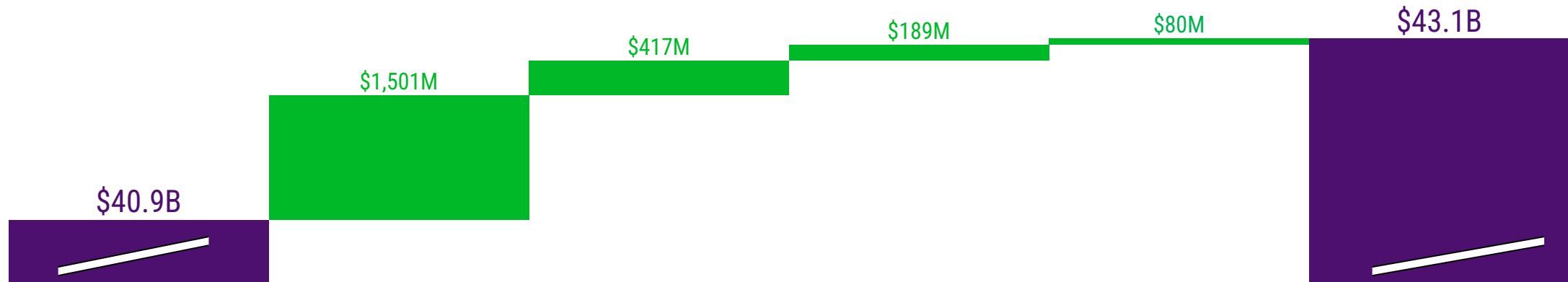


-8.8%
vs. YA
-10.7%
vs. Mar '26

Confection categories Show Broad Dollar Strength Against Weakening Units

Confections by Category Dollar Trends – Growth/Decline

Dollar Change vs. YA



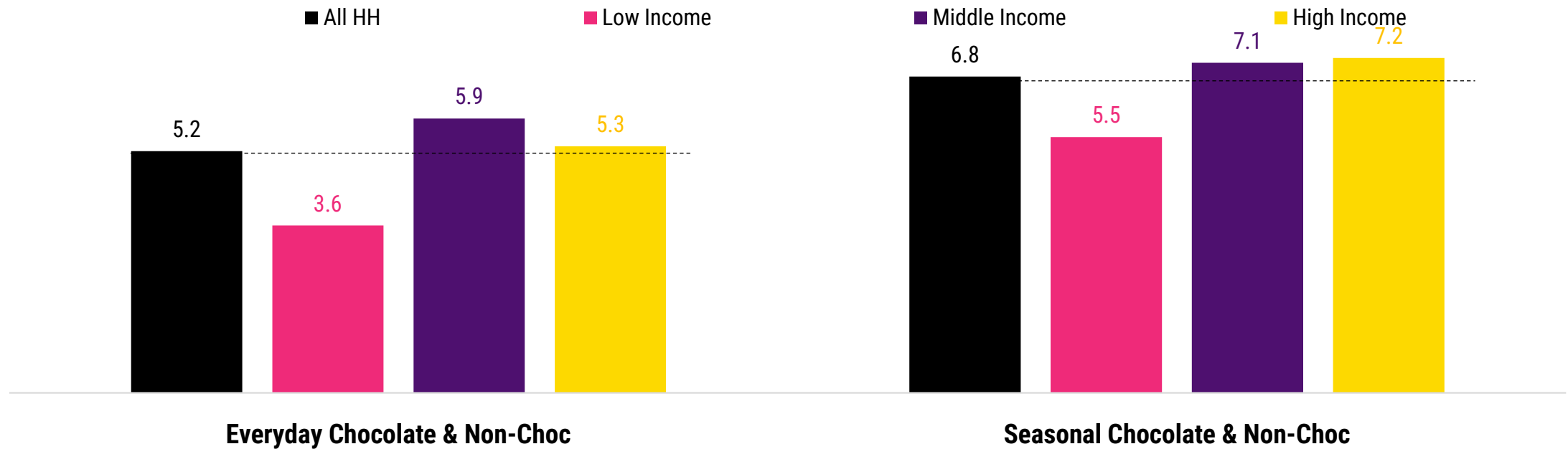
	Chocolate	Non Chocolate	Gum	Breath Fresheners	Confection 2025 \$ Sales
Confection 2024 \$ Sales					\$40.9B
Dollar Share of Confection Growth	68%	19%	9%	4%	
\$ % Chg vs. YA	6.8%	3.1%	5.0%	5.7%	5.3%
Unit % Chg vs. YA	-1.4%	-1.1%	-2.4%	-0.9%	-1.4%
Price per Unit % Chg vs. YA	8.3%	4.2%	7.5%	6.7%	6.8%



Low Income shoppers spend within candy lagging behind other cohorts

Demographic Trends

\$ % Chg vs. YA



Premium Products Are Driving Growth In Chocolate And Non-chocolate, Whereas Mainstream Products Are Leading The Gains In Breath Fresheners And Gum

National Brand	Chocolate		Non Chocolate		Breath Fresheners		Gum	
	YTD	ppt. vs. YA	YTD	ppt. vs. YA	YTD	ppt. vs. YA	YTD	ppt. vs. YA
	Super Premium	11%	-0.1	5%	0.0	22%	0.1	1%
Premium	13%	0.5	11%	0.2	1%	0.1	0%	0.0
Mainstream	33%	0.4	52%	0.0	8%	0.5	91%	1.1
Value	34%	-0.9	25%	0.1	51%	-0.3	7%	-1.1
Private Label (all tiers)	9%	0.0	6%	-0.3	18%	-0.4	0%	-0.1



In Food & Beverage, Confections, Chocolate & Non-chocolate Candy E-commerce Emerges As A Key Growth Driver

Channel Contribution to Dollar Sales Growth

Channels ranked by Total F&B 2025 Dollar Sales



		Total F&B		Total Confections		Chocolate Candy		Non-Chocolate Candy	
		% of \$ Sales \$881B	% Contribution to Market \$ Growth/Decline +\$32B	% of \$ Sales \$43B	% Contribution to Market \$ Growth/Decline +\$2.4B	% of \$ Sales \$24B	% Contribution to Market \$ Growth/Decline +\$1.7B	% of \$ Sales \$14B	% Contribution to Market \$ Growth/Decline +455M
	Grocery (B&M)	42%	18	23%	28	26%	31	18%	23
	Mass (B&M)	19%	7	22%	13	23%	10	21%	20
	Convenience (B&M)	12%	4	20%	9	16%	12	23%	-10
	Club (B&M)	12%	24	9%	11	12%	14	6%	3
	Total E-Comm	10%	46	7%	26	7%	20	7%	48
	Dollar (B&M)	4%	3	13%	14	10%	1	18%	25
	Drug (B&M)	1%	2	6%	-1	7%	1	6%	-9

SNAP consumers are decreasing their total SNAP payment share

Total Food & Beverage

SNAP Payment Share of Total \$ **7.7%**

YOY PT. Change in SNAP Payment Share of Sales \$ **-0.9 pts**

Chocolate Candy

SNAP Payment Share of Total \$ **5.9%**

YOY PT. Change in SNAP Payment Share of Sales \$ **-0.8%**

Non Chocolate Candy

SNAP Payment Share of Total \$ **6.3%**

YOY PT. Change in SNAP Payment Share of Sales \$ **-0.9%**

SNAP HH's Share of Omnichannel Sales

General Food Aisles	SNAP Payment Shr of Ttl \$	YOY Pt. Change in SNAP Payment Share of Sales \$
Breakfast	9.2%	-0.9
Meals	9.2%	-1.1
Cookies & Crackers	8.7%	-0.9
Ethnic	8.2%	-0.9
Baking	8.2%	-1.0
Condiments & Sauces	8.1%	-0.9
SS Vegetables	7.9%	-1.0
SS Fruit	7.8%	-0.7
Bakery	7.8%	-1.0
Snacks	7.3%	-1.0
Baby Food	7.3%	-0.2
Candy	6.1%	-0.8

Seasonal Trends

Halloween 2025

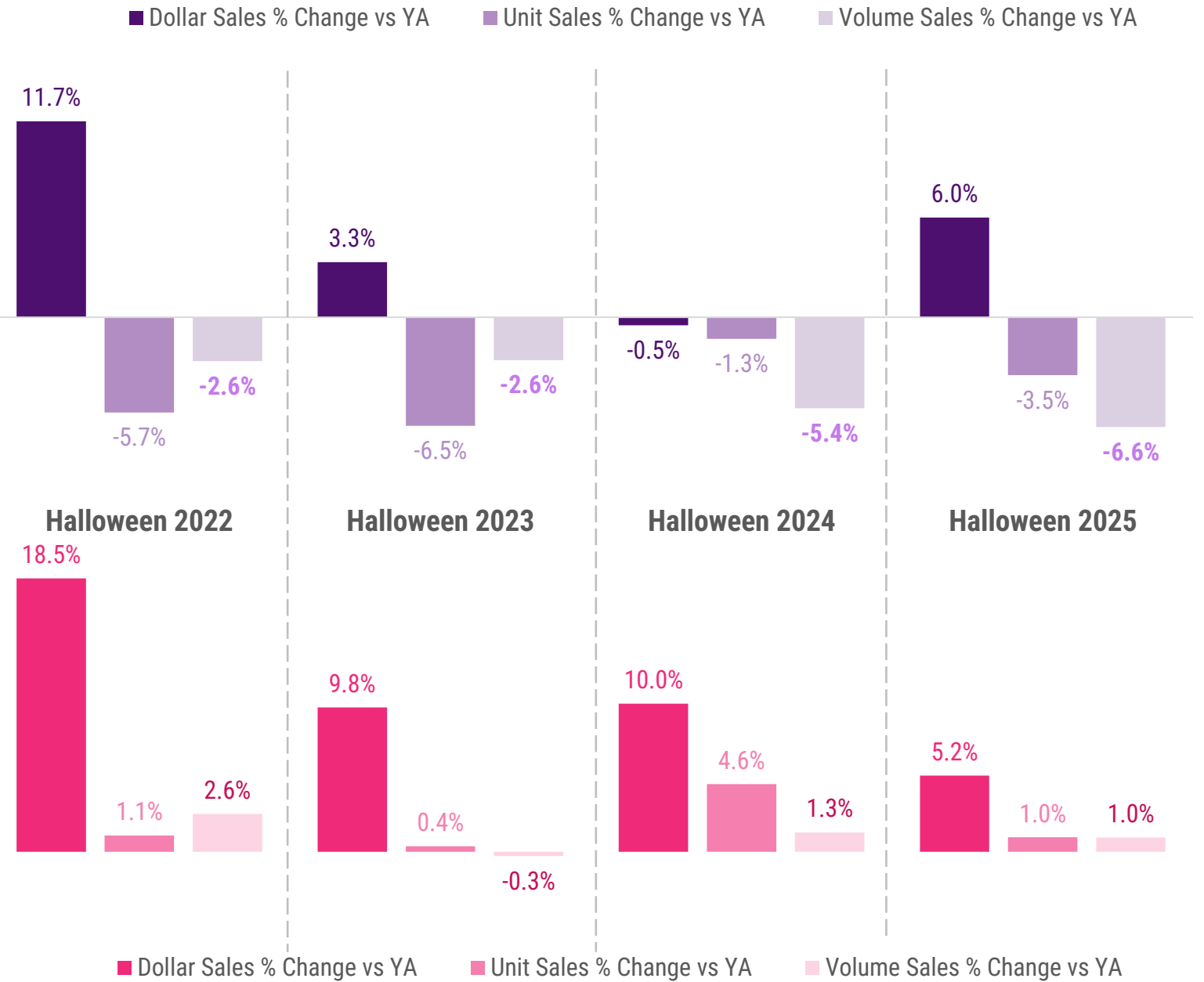


Over recent Halloween seasons, chocolate delivered uneven dollar growth with sustained unit and volume declines; non-chocolate has posted steadier gains supported by improving units and volume



Chocolate

Non-Chocolate

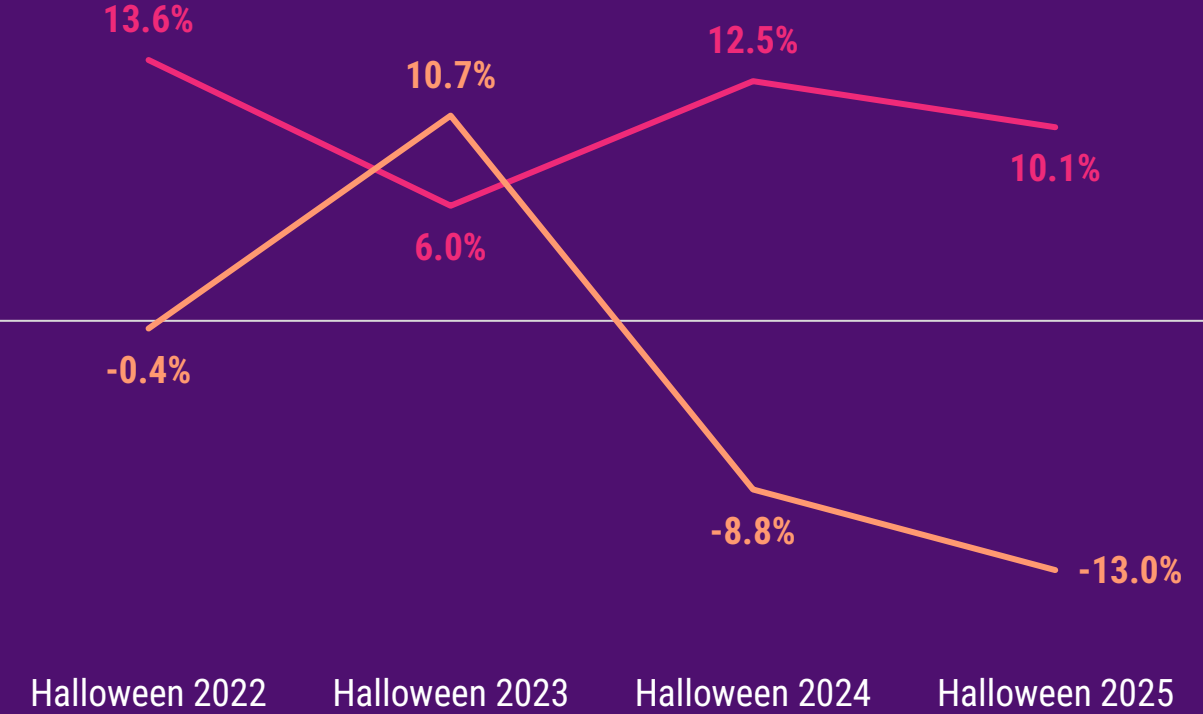


Chocolate and Non-Chocolate Candy Show Different Pricing Paths, Same Unit Price Pressure

Price and Volume Trends in Halloween Chocolate Candy

% Change vs YA

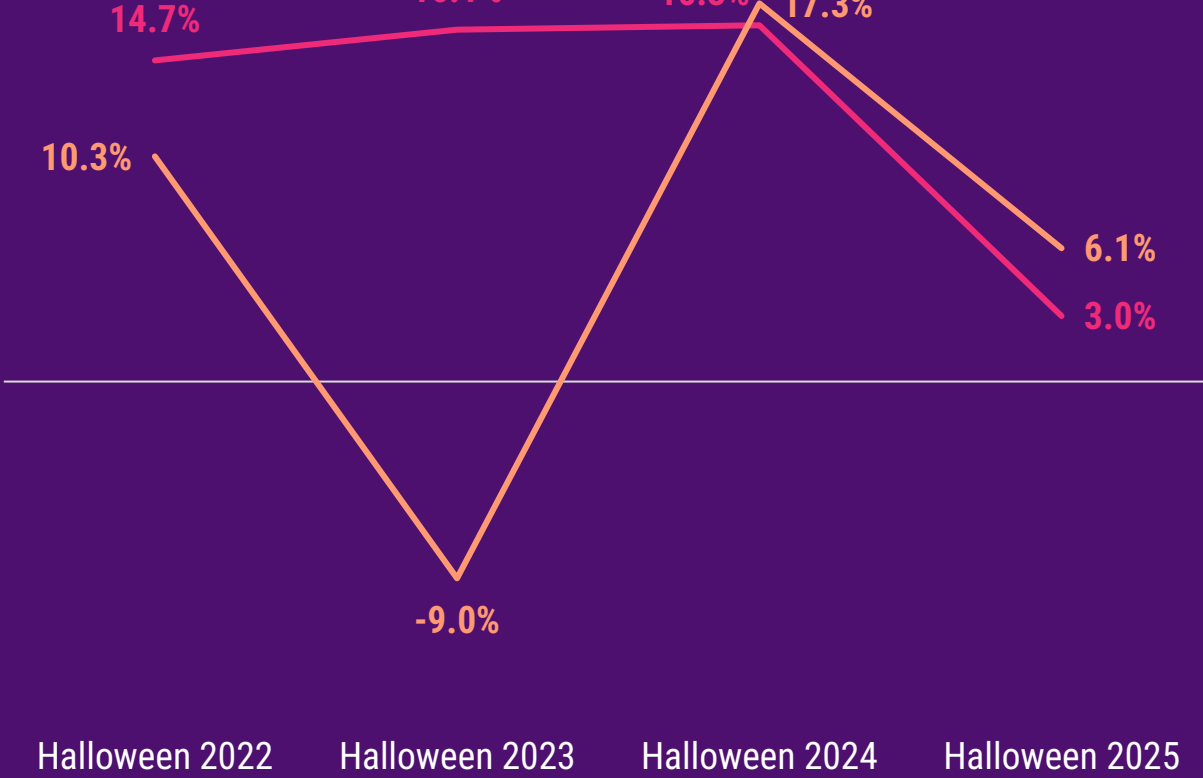
Price Per Volume Volume Sales



Price and Volume Trends in Halloween Non-Chocolate Candy

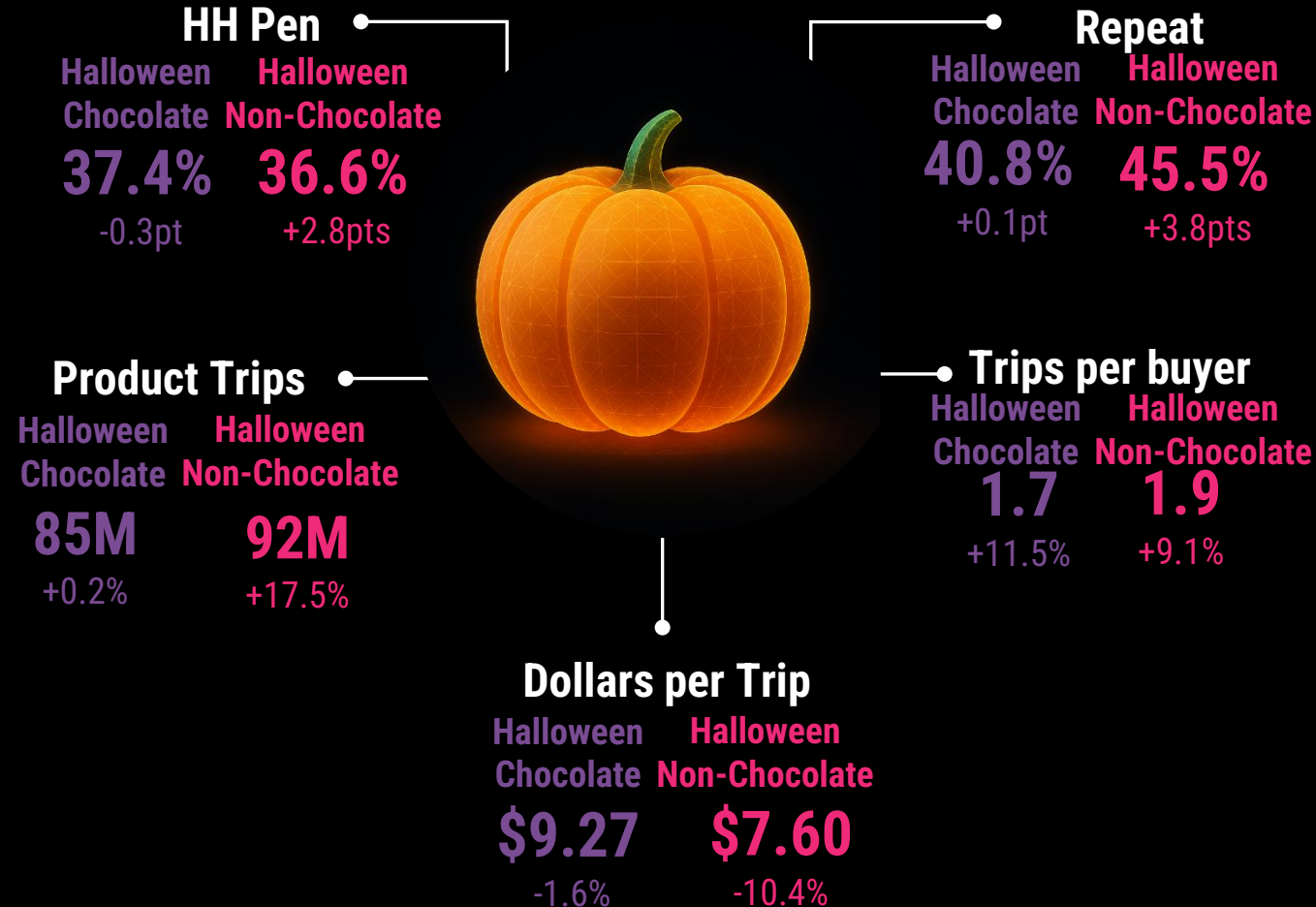
% Change vs YA

Price Per Volume Volume Sales



Non-Chocolate Halloween candy saw more household engagement and increased repeat purchases

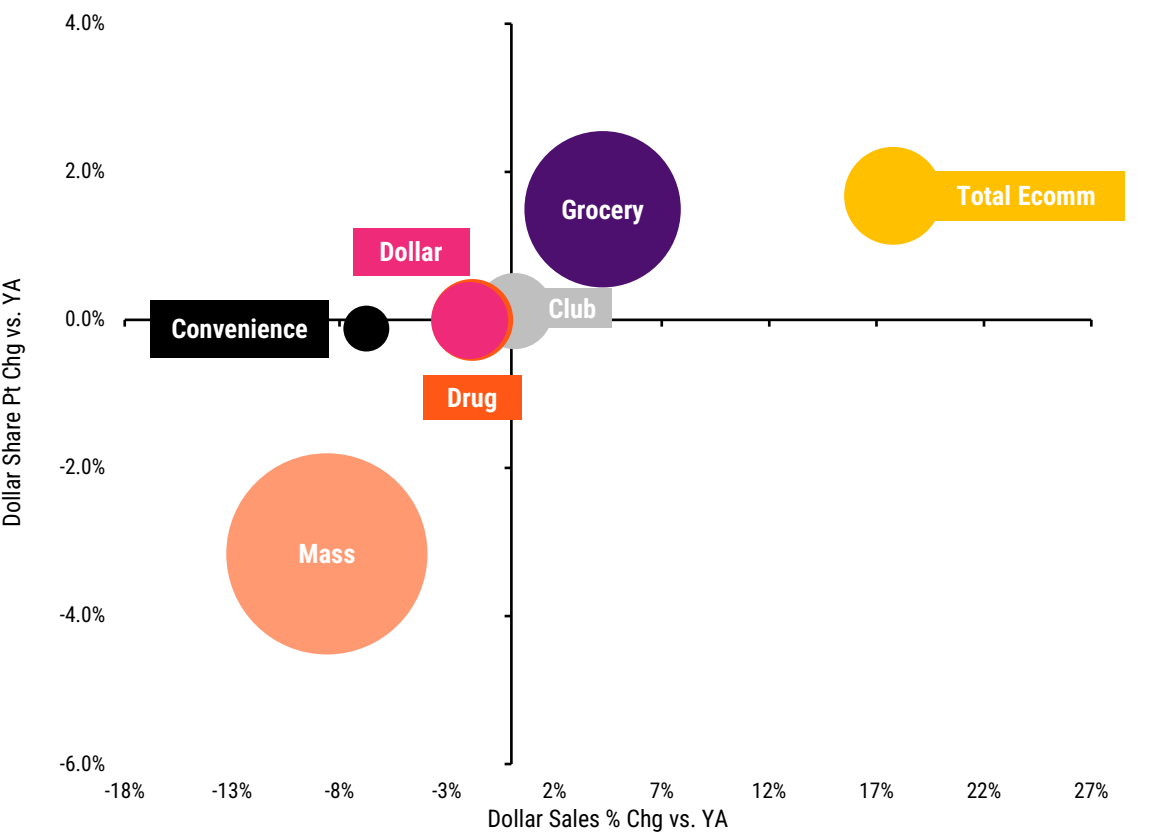
Halloween 2025



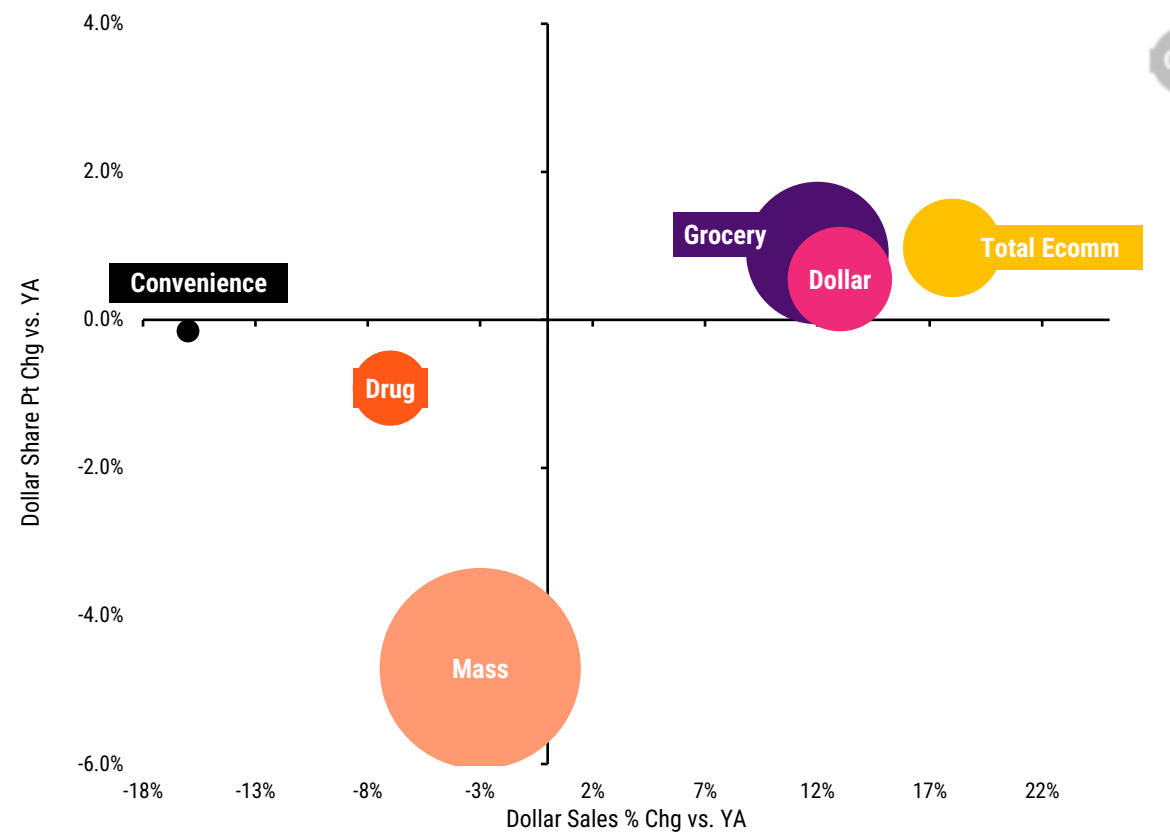
As consumers shift away from Mass, Halloween chocolate growth concentrates in Grocery and E-Comm, while non-chocolate candy posts widespread growth—led by Club

Channel Shifting (Size of Bubble = Share)

Halloween Chocolate Candy Category Dollar Trends
8 weeks Ending November 2nd, 2025



Halloween Non-Chocolate Candy Category Dollar Trends
8 weeks Ending November 2nd, 2025

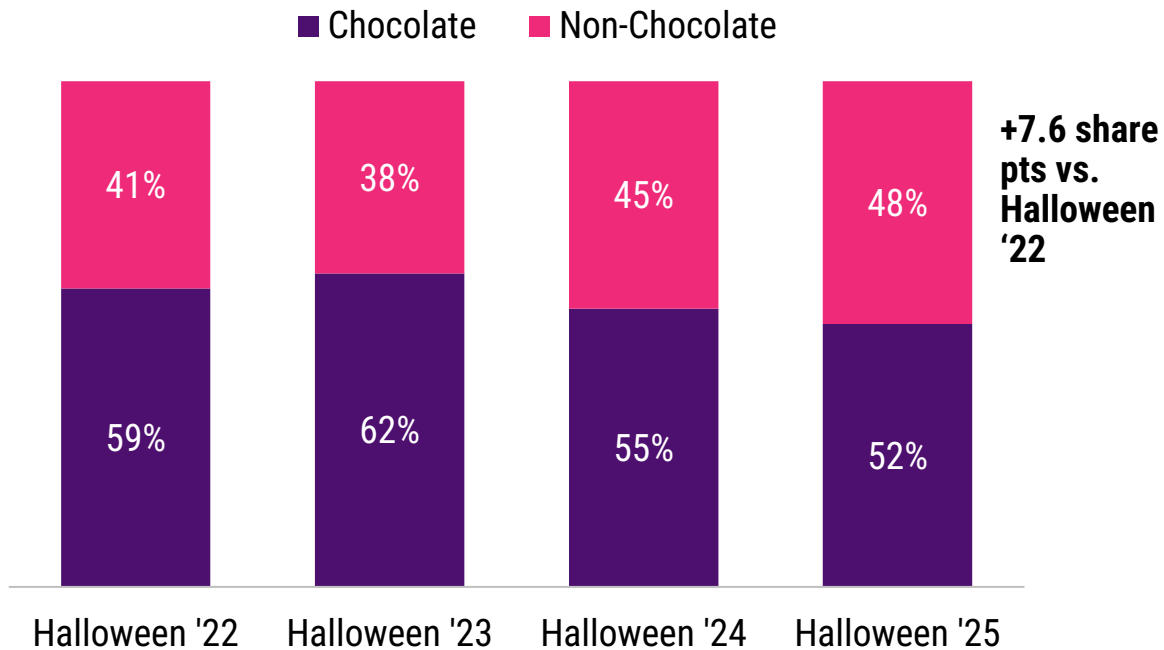


Seasonal Non-Chocolate Halloween candy tops volume share of seasonal chocolate Halloween candy

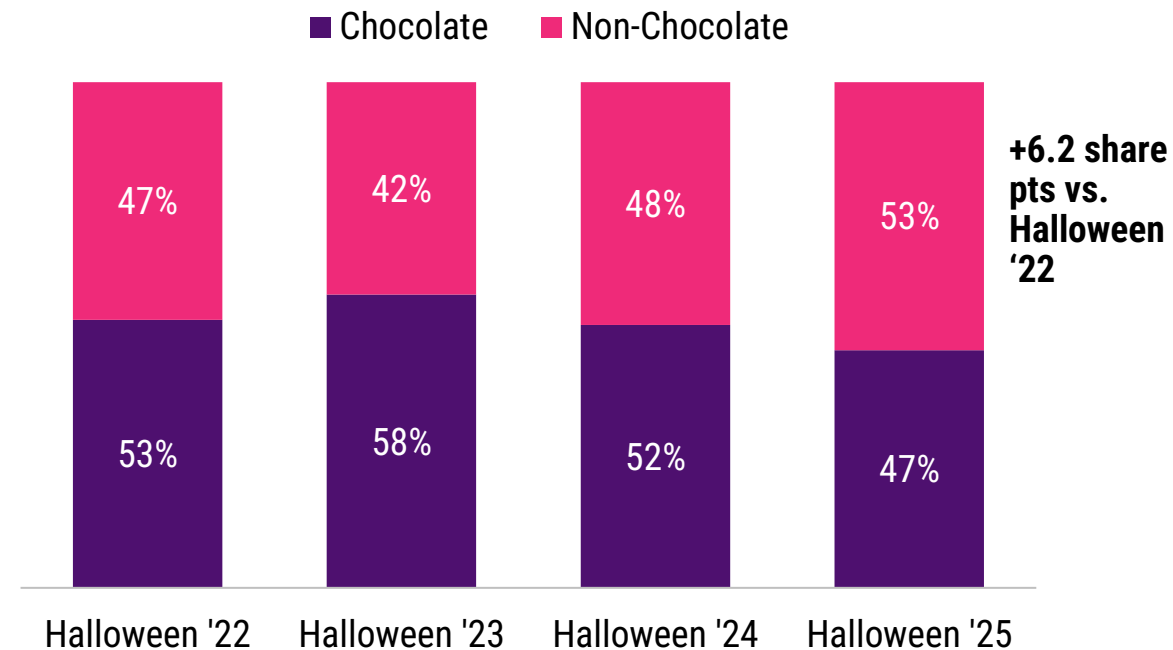
Seasonal Non-Chocolate Halloween candy continues to steal share from Chocolate



Dollar Share of Seasonal Halloween Candy



Volume Share of Seasonal Halloween Candy

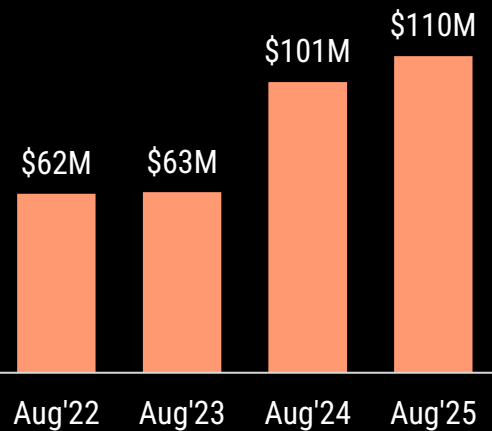


Halloween's time frame is expanding with introductions of Summerween and Hallowmas

Mars Wrigley leads the charge in creating more occasions for Halloween candy

Summerween

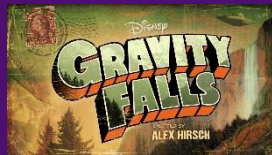
Seasonal Halloween Candy Dollar Sales (\$M)



Mars announced new lineup of Halloween candy in Summer 2025 alongside Halloween candy hitting shelves earlier than ever



Walmart released "Summer Frights" sections in select stores



Summerween originates from the Disney animate series, 'Gravity Falls'. The fictional holiday has made it into the real world with manufactures and retailers buying into the expanded time for seasonal Halloween Candy

Hallowmas



New TWIX Goulish Green and TWIX Snowman featured in the Hallowmas pack



"We're excited to have fans help us give Hallowmas a 'moment' celebrating both of their favorite holidays at once, which only TWIX, the brand of two, can deliver on."

MARS WRIGLEY

-Tim LeBel, President of Sales Mars Wrigley North America



Twix launched **Hallowmas**, a celebration that merges Halloween and the winter holiday season. Alongside the release of the Hallowmas pack, fans could enter a sweepstakes tow in TWIX candy for Halloween and \$20,000 in cash for the winter holidays

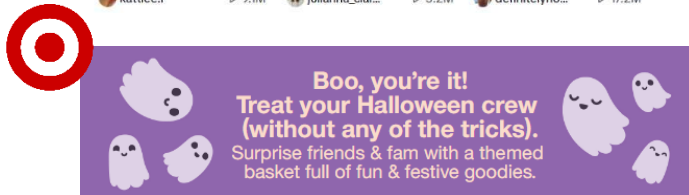
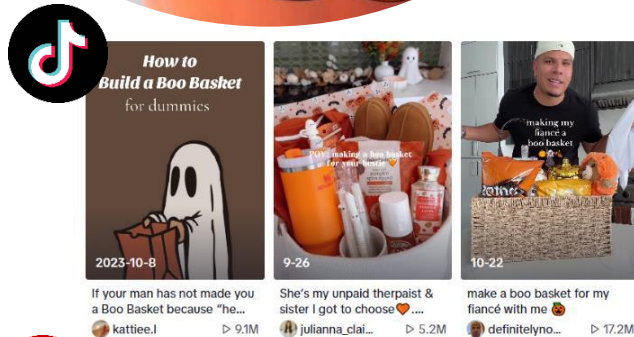
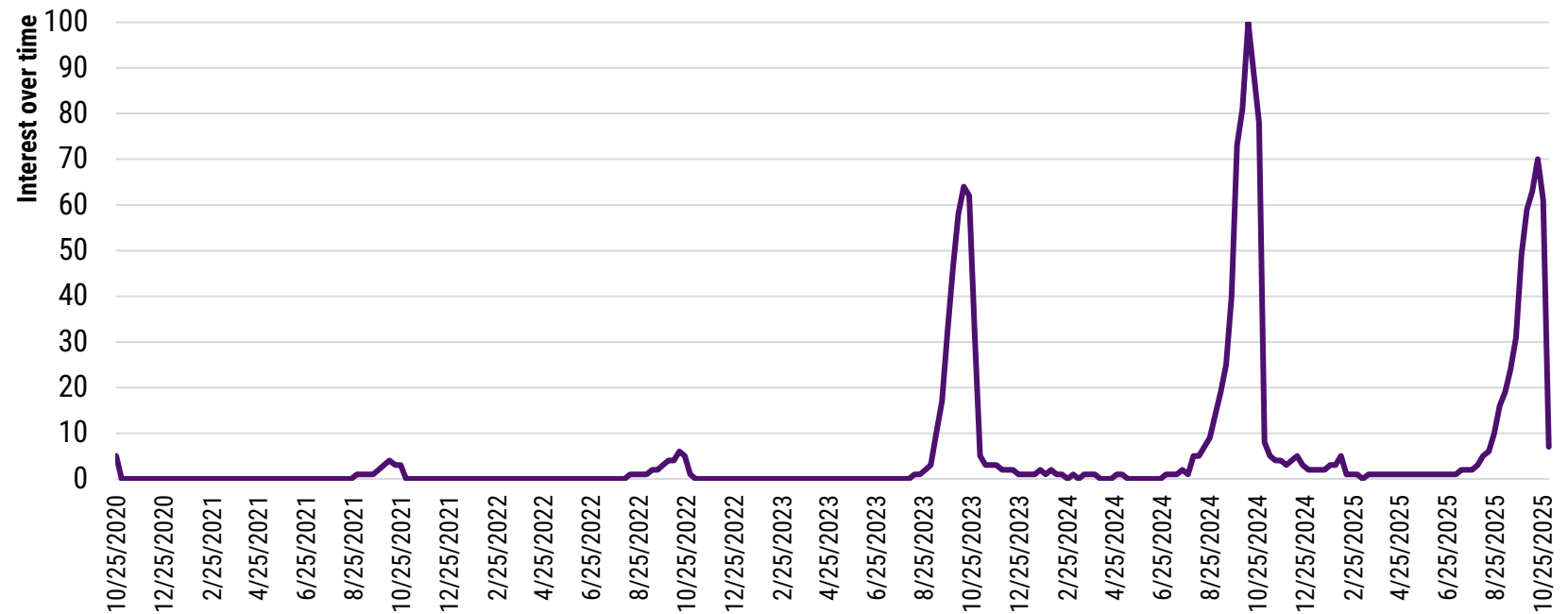


“Boo Baskets” are a growing seasonal trend that have accelerated in recent years

The phenomenon of building boo baskets was popular across social media in 2024 and 2025, with videos on how to build the best basket for kids, romantic partners, family members, pets, and friends

Google Search Trends “Boo Basket” (United States)

October 2020 through October 2025

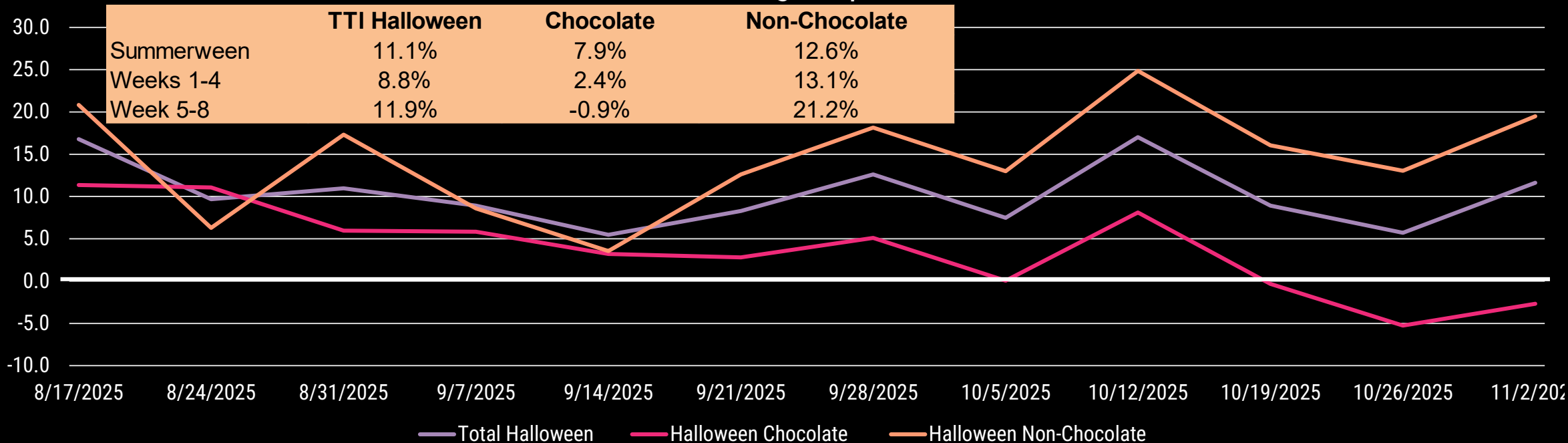


Target leaned into this trend with dedicated space on their website offering basket ideas for everyone from the “little ghouls” to the “scary-movie marathons”.



Trips for Halloween candy were up, primarily driven by Non-Chocolate

% Change Trips



Halloween Chocolate innovation revolves around classic flavors in new formats

Reese's Mini Pumpkins

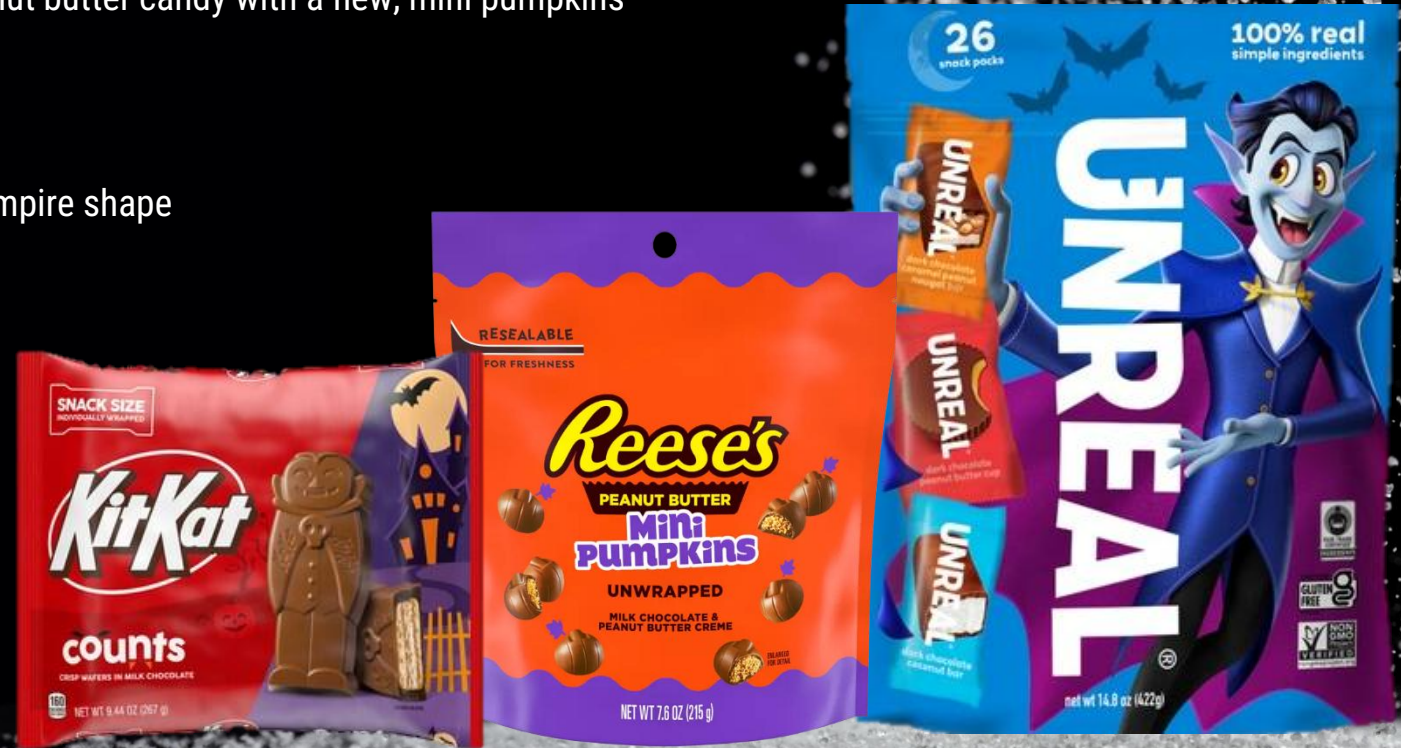
- Innovated with their classic milk chocolate and peanut butter candy with a new, mini pumpkins bag, perfect for the Halloween season
- Comes in resealable bag

KitKat Counts

- Familiar wafer in chocolate, in festive Halloween vampire shape
- Individually-wrapped; perfect for trick-or-treating

Unreal Halloween Bags

- First entry for Unreal into Halloween candy
- Dye-free, non-GMO, gluten free, and fair trade certified
- Released multiple bags with individually wrapped chocolates perfect for trick-or-treating
- Products available online and in select national retailers



Mystery flavors take center stage of non-chocolate innovation this Halloween season

Jolly Rancher Gummies Trickies

- Halloween version of their normal gummy candies
- Each gummy's color and flavor are mixed up for a surprise in each bite
- Comes in resealable bags and fun size bags

Hi-Chew Mystery Mix

- Individually wrapped candies with 3 known flavors and one mystery flavor
- Mystery flavor is a new flavor that's never appeared in any previous Hi-Chew mixes before
- Ran guessing game on their website for chance to win prizes

Skittles Shriekers

- Halloween-themed Skittles aimed to make your 'shriek'
- Mix consists of standard Skittles with hidden, super sour Skittles
- Available in standard bags and found in Halloween bags with other fun size Skittle flavors



One of the viral moments of Halloween 2025 was when emotion, humor, and candy collide

500M

Earned Impressions

1000+

Media Placement

900%

Increase in site traffic

1400%

Increase in Brand Mentions outside Valentine's Day



For Halloween, the messages on Sweethearts disappeared just like those who've ghosted you.



Halloween candy opportunities exist with consumers currently purchasing chocolate and non-chocolate

93%

of consumers purchase Chocolate and Non-Chocolate candy during the 8 week Halloween season; 40% of those consumers are not purchasing Halloween candy



51M
potential households to convert

up to **\$1.1B**
opportunity if we get these households buying Chocolate and Non-Chocolate candy to purchase Halloween items



Seasonal Trends

Winter Holiday 2025



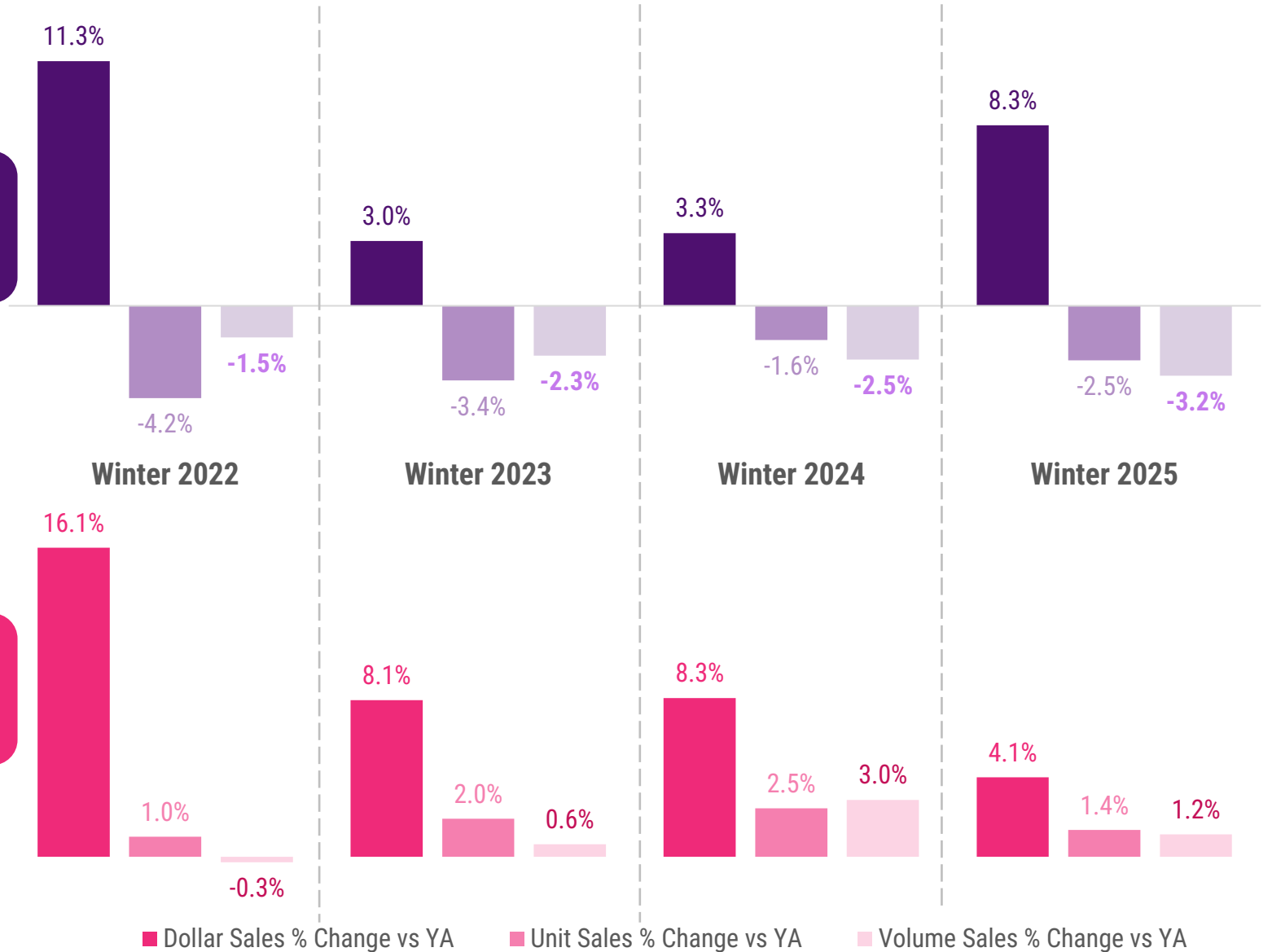
Chocolate performance over the winter holidays has been more variable, while Non-Chocolate delivers sustained growth



Chocolate

Non-Chocolate

■ Dollar Sales % Change vs YA ■ Unit Sales % Change vs YA ■ Volume Sales % Change vs YA

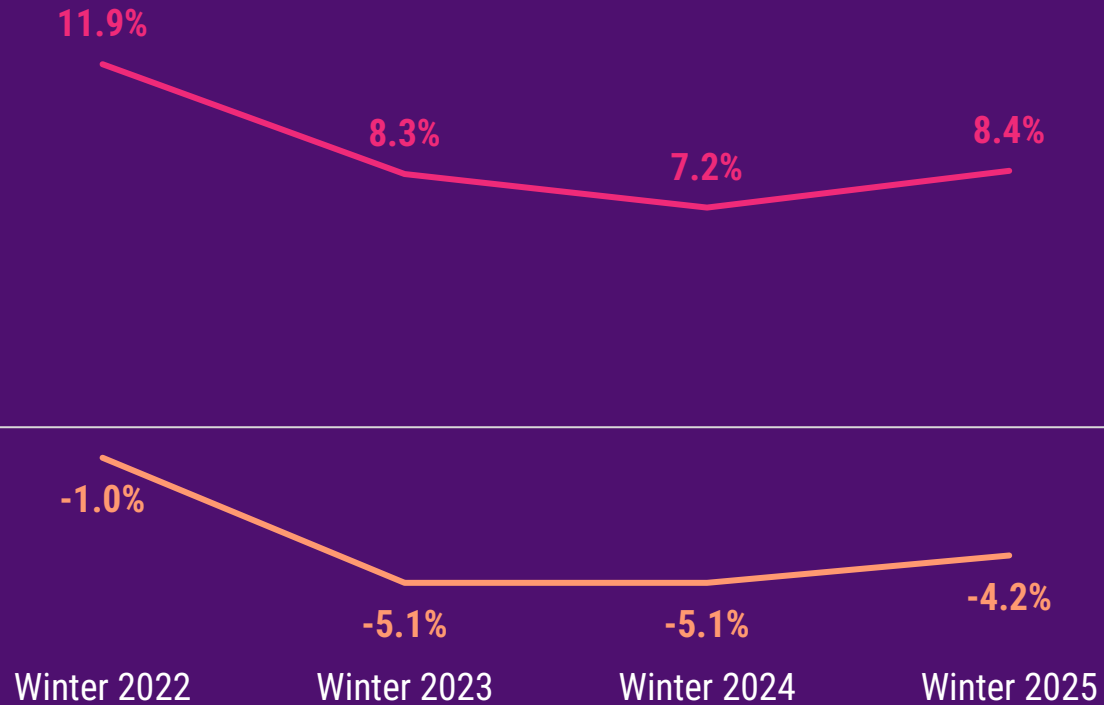


Chocolate and Non-Chocolate Candy See Cooling Price Momentum during Winter Holidays

Price and Volume Trends in Winter Holiday Chocolate Candy

% Change vs YA

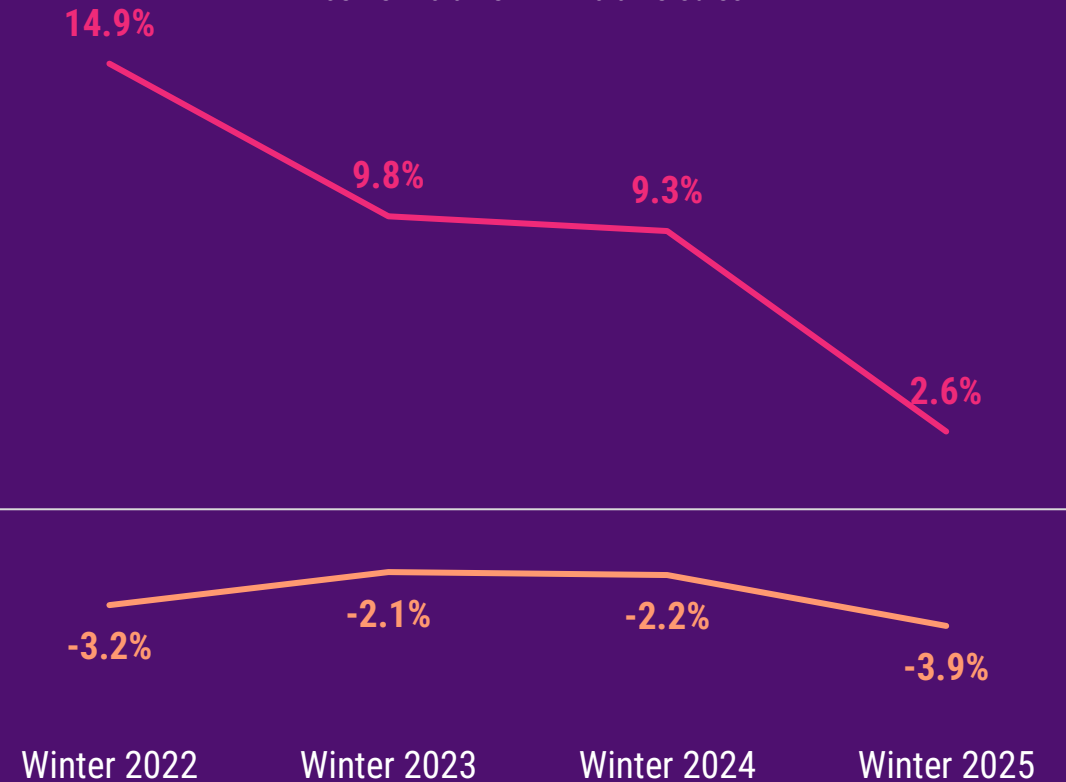
Price Per Volume Volume Sales



Price and Volume Trends in Winter Holiday Non-Chocolate Candy

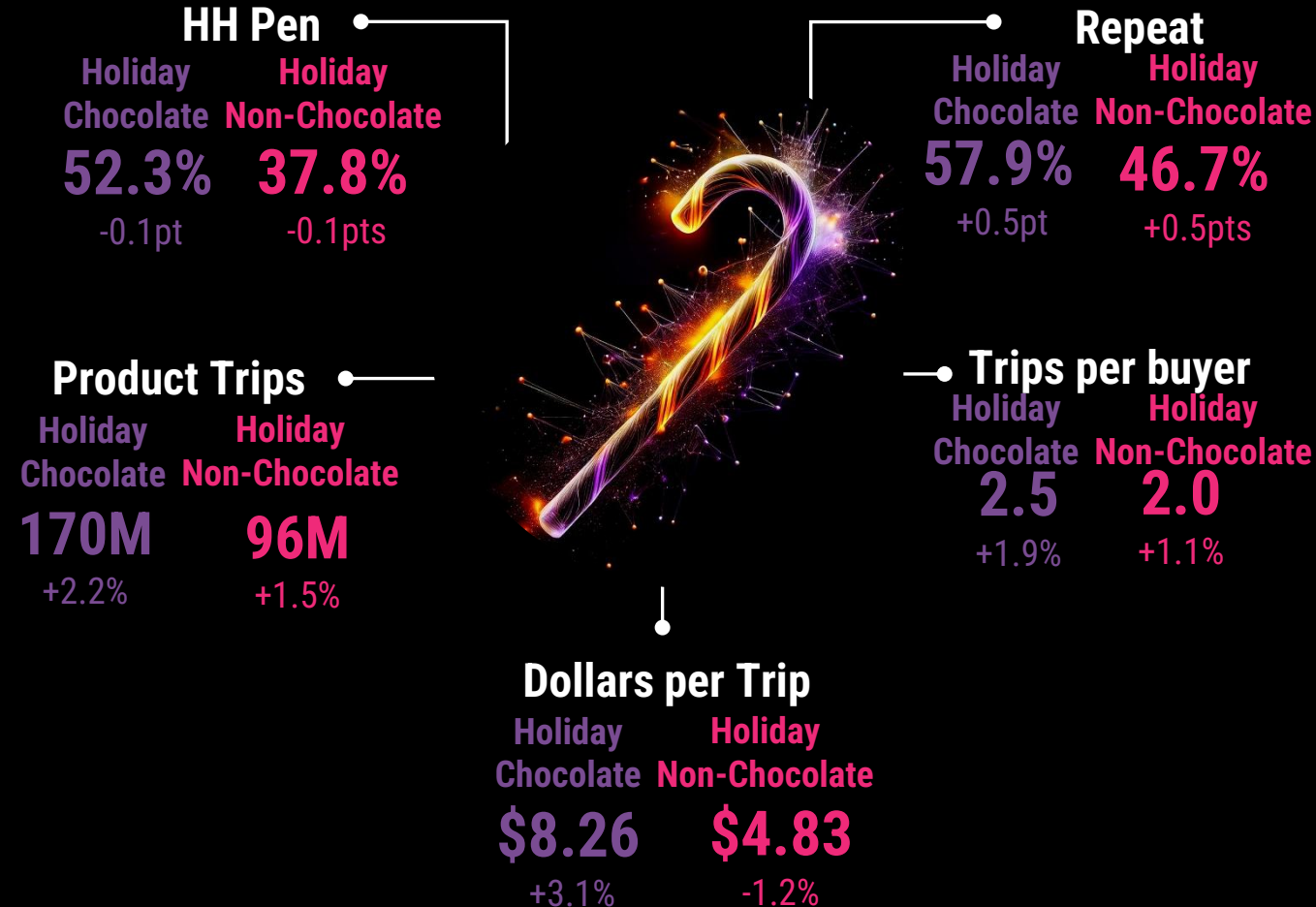
% Change vs YA

Price Per Volume Volume Sales



Penetration down slightly vs. year ago however, consumers increased trips for Holiday candy

Winter Holiday 2025

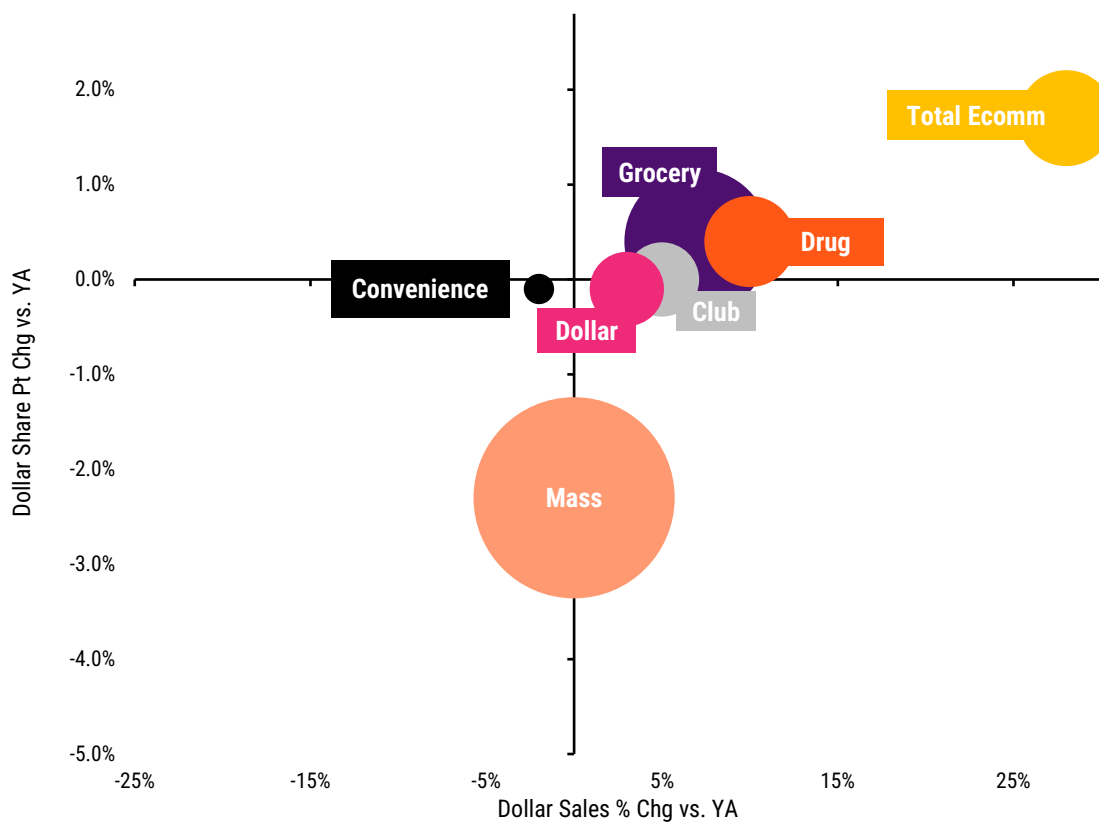


As consumers pull back from Mass, Christmas chocolate growth is driven by E-Commerce, while non-chocolate candy shows broad growth across E-Comm, Club, and Dollar

Channel Shifting (Size of Bubble = Share)

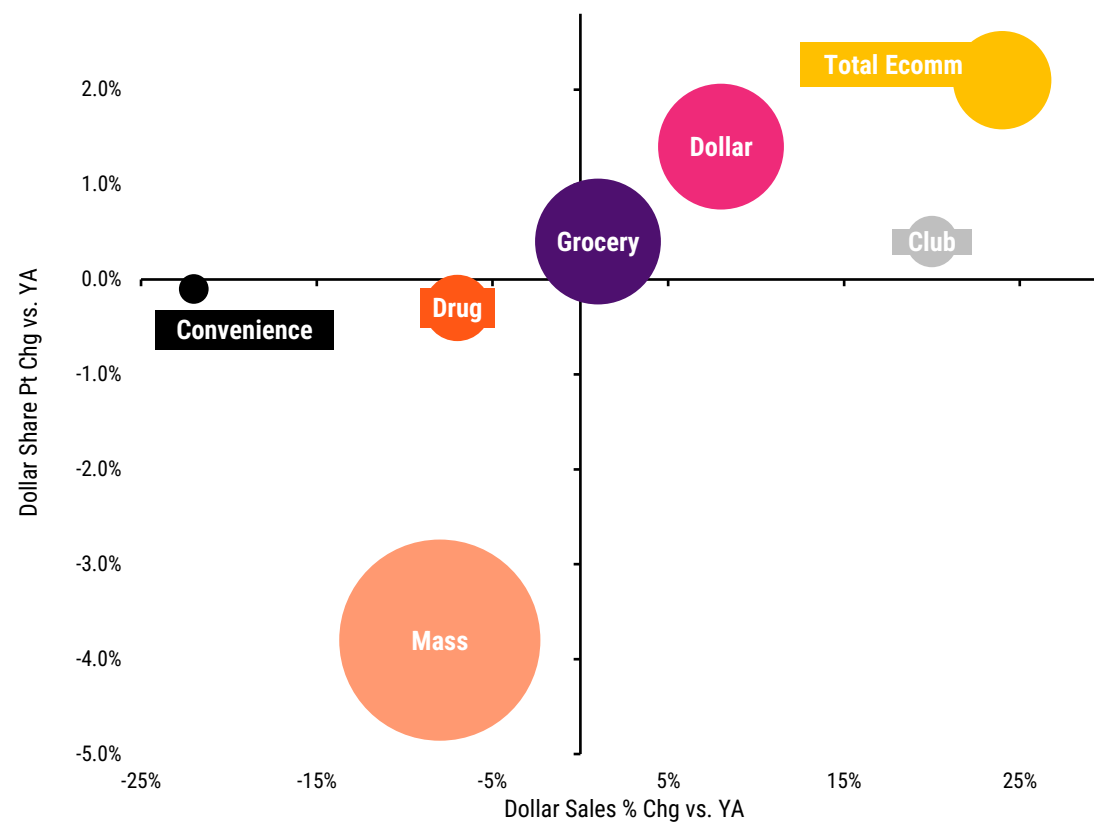
Winter Holiday Chocolate Candy Category Dollar Trends

8 weeks Ending December 28th, 2025



Winter Holiday Non-Chocolate Candy Category Dollar Trends

8 weeks Ending December 28th, 2025

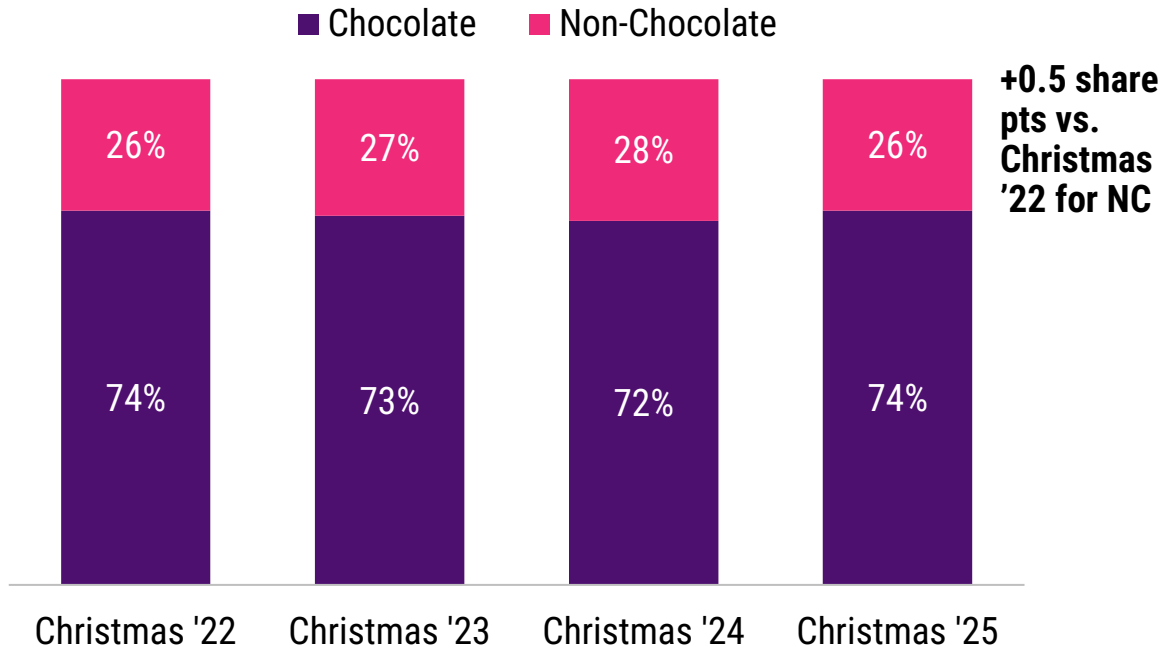


Chocolate Winter Holiday candy leads the season with over 2/3 of dollars and units of all seasonal Holiday candy

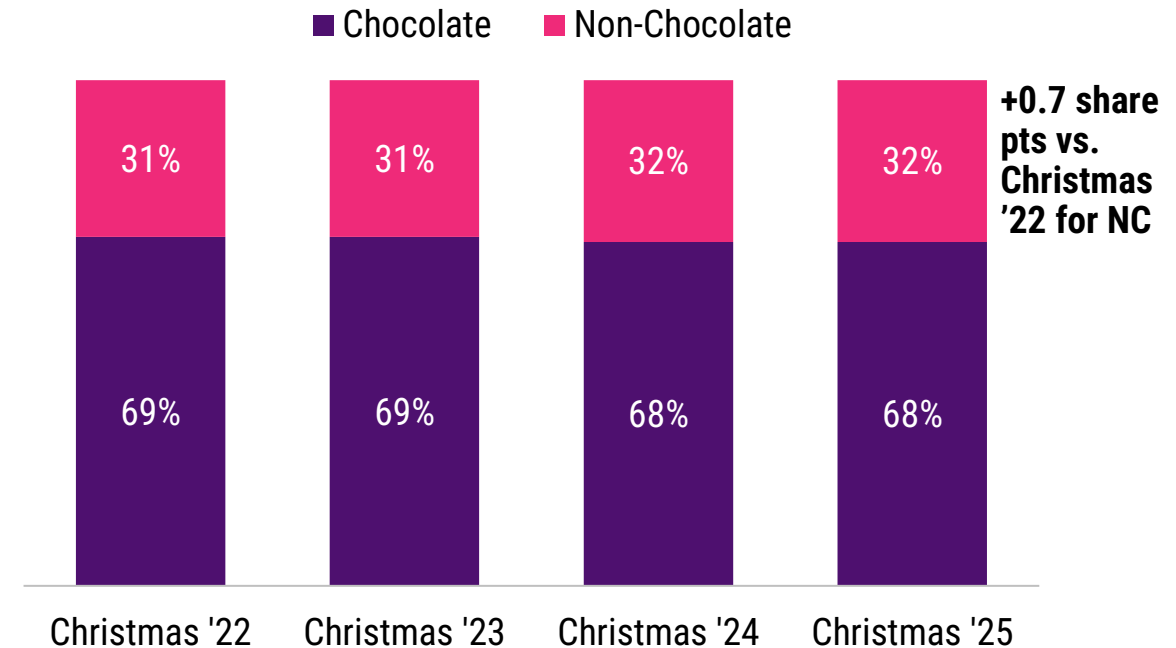
Chocolate Christmas candy regained lost \$ share this season



Dollar Share of Seasonal Christmas Candy



Volume Share of Seasonal Christmas Candy



Holiday sales on TikTok shop were powered by gift packs and viral trends



AMOS Christmas Candy Gift Set | Peelz Gummies & Music Lollipop | Fun Holiday Treats for Kids | Sweet Stocking Stuffer Gift Idea

Sold by Amos Sweets

4★ (152) 3.2K sold

Amos Peelerz #1 item on TikTok Shop during Christmas 2025



VIRAL TRENDS:
Includes Peelerz gummies and music lollipops



Top Viral Influencer promoting Amos Gift Pack, exclusive to Amos TikTok Shop

One of the Holiday's most popular candies sees innovation through flavor and creativity

4 of the top 10 non-chocolate candy UPCs this Winter Holiday were candy canes

AriZona Iced Tea Candy Canes



Available for Limited Time at Albertsons and Safeway

Holiday-themed treat featuring popular flavors: Grapeade, Mango, and Watermelon

Brach's Candy Cane Opener



Available for Limited Time on Brach's website

Created a tool specifically to open candy canes, delivering a fast and mess-free unwrap

New Confections landed for Holiday 2025

Innovation around the holiday proves different for each manufacturer

- Iconic brands reimaged
- Seasonal packaging
- New format entries
- Redefining the candy experience



Nearly two thirds (65%) of winter seasonal candy consumers make a repeat purchase



Converting Halloween Candy buyers can help spur growth

15.5%

Seasonal Halloween candy buyers did not purchase any Winter Holiday candy items, translating to 19M HH.

\$285M

Influencing these Halloween Candy buyers to purchase Winter Holiday Candy represents a \$285M opportunity!



Seasonal Trends

Valentine's Day 2026

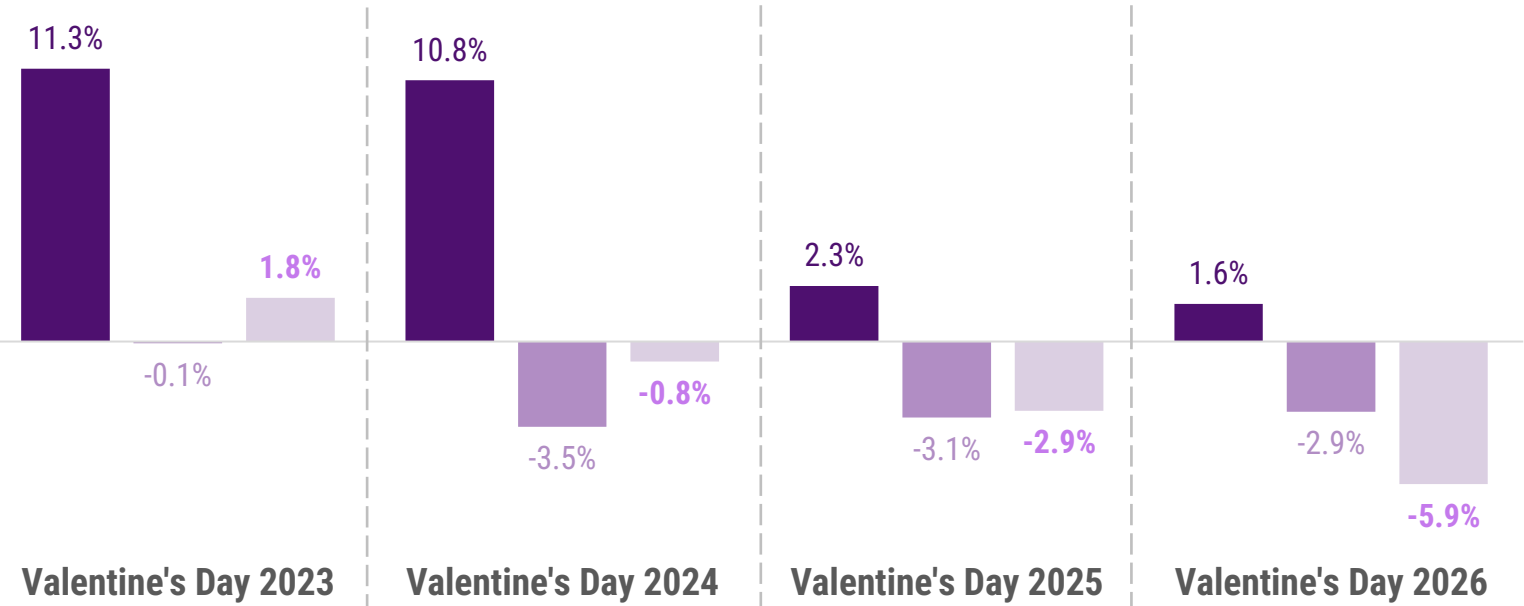




Over the past four Valentine's seasons, Chocolate dollar growth has been price-led amid declining units and volume, while Non-Chocolate drives growth through increasing units despite ongoing volume declines

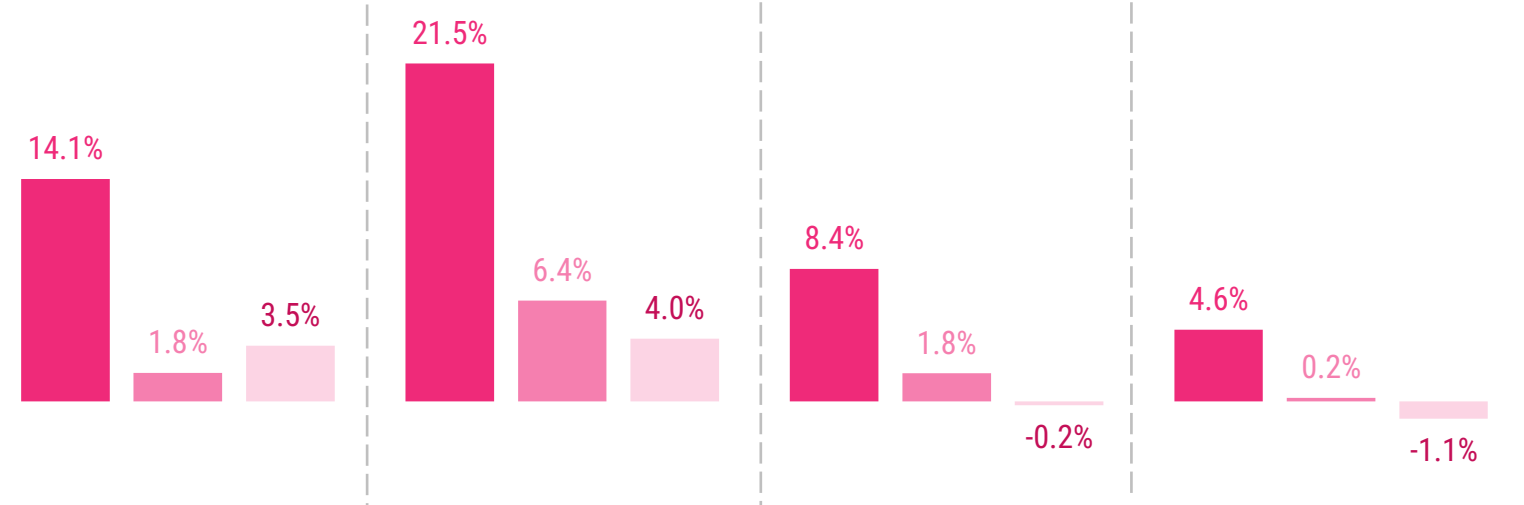
Chocolate

■ Dollar Sales % Change vs YA ■ Unit Sales % Change vs YA ■ Volume Sales % Change vs YA



Non-Chocolate

■ Dollar Sales % Change vs YA ■ Unit Sales % Change vs YA ■ Volume Sales % Change vs YA

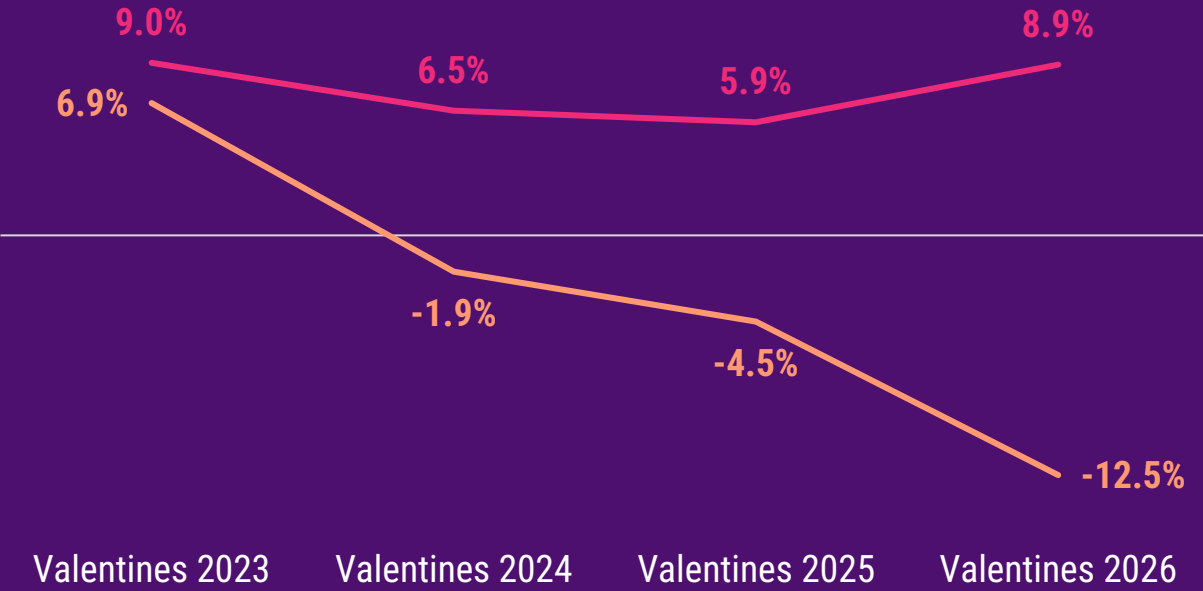


Love Costs More: Shoppers Buy Less as Valentine's Prices Climb

Price and Volume Trends in Valentines Chocolate Candy

% Change vs YA

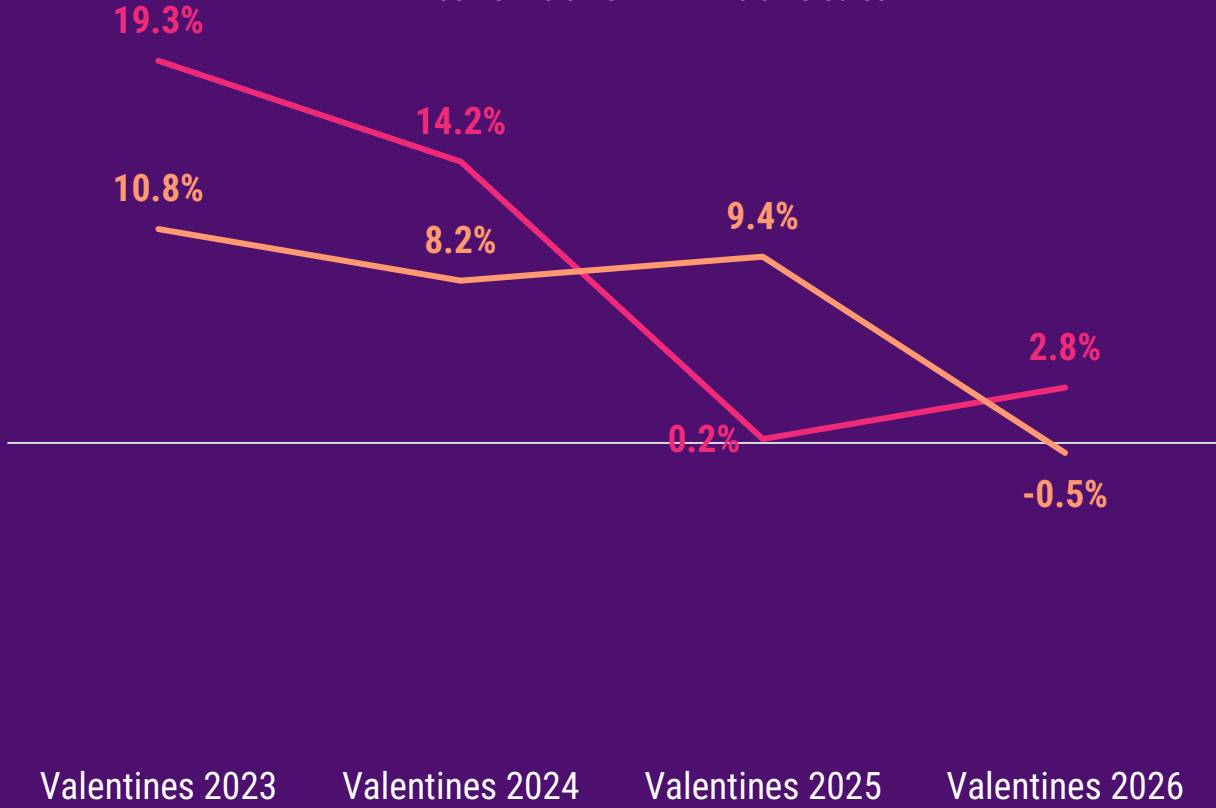
Price Per Volume Volume Sales



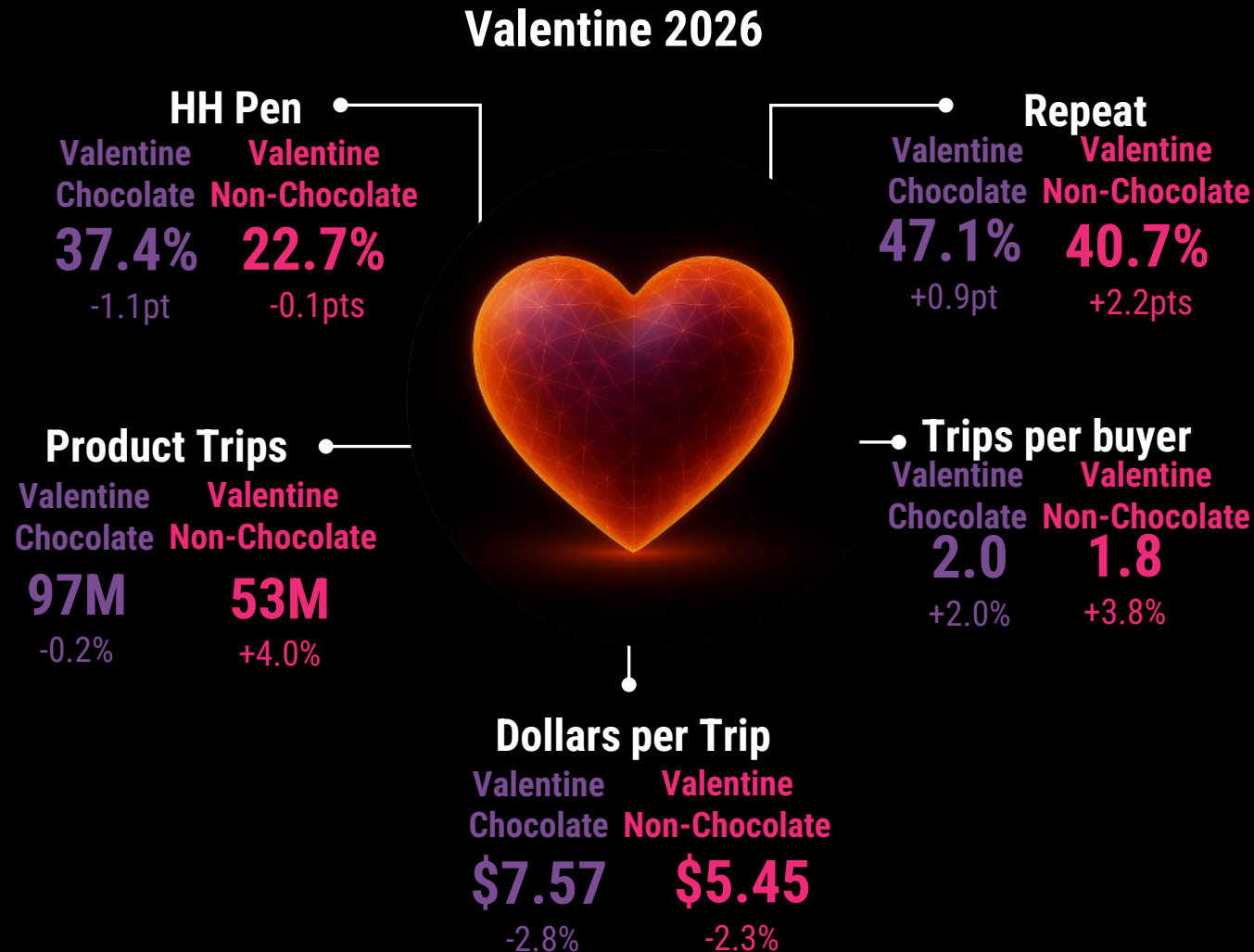
Price and Volume Trends in Valentines Non-Chocolate Candy

% Change vs YA

Price Per Volume Volume Sales



Fewer households purchased Valentine candy, with Non-Chocolate Valentine posting an uptick in repeat and trips

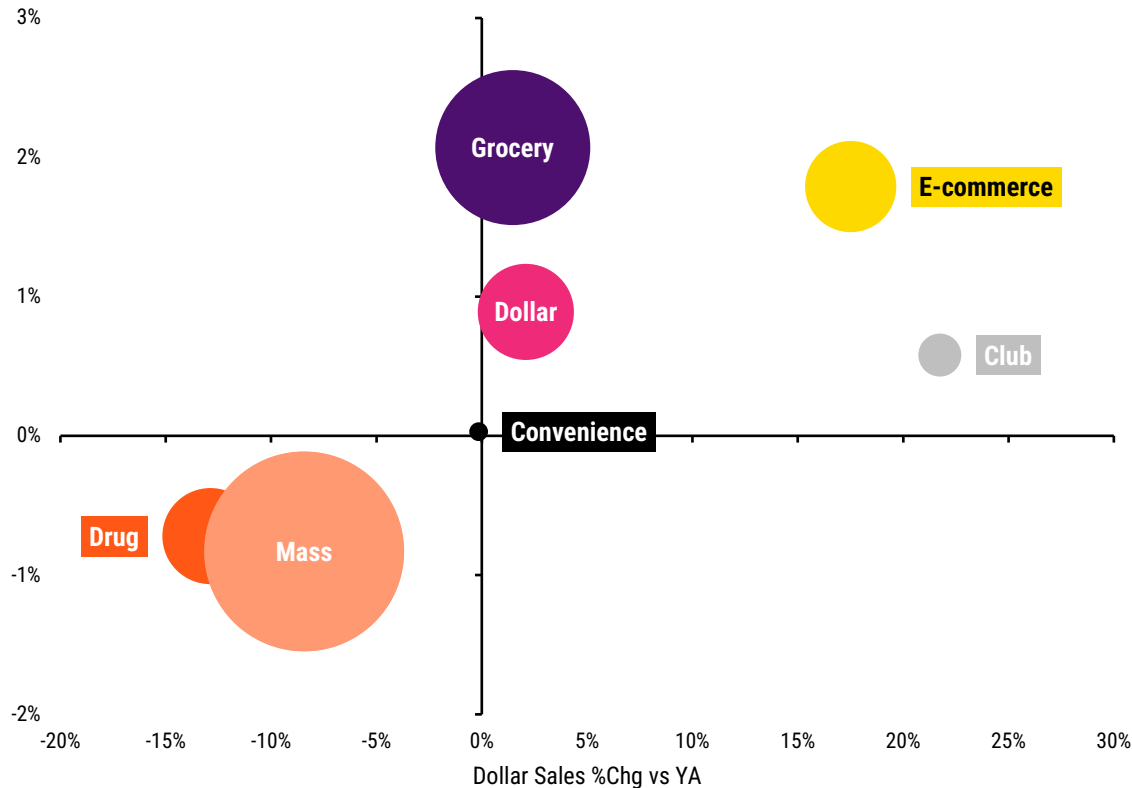


As consumers shift away from Mass, Halloween chocolate growth concentrates in Grocery and E-Comm, while non-chocolate candy posts widespread growth—led by Club

Channel Shifting (Size of Bubble = Share)

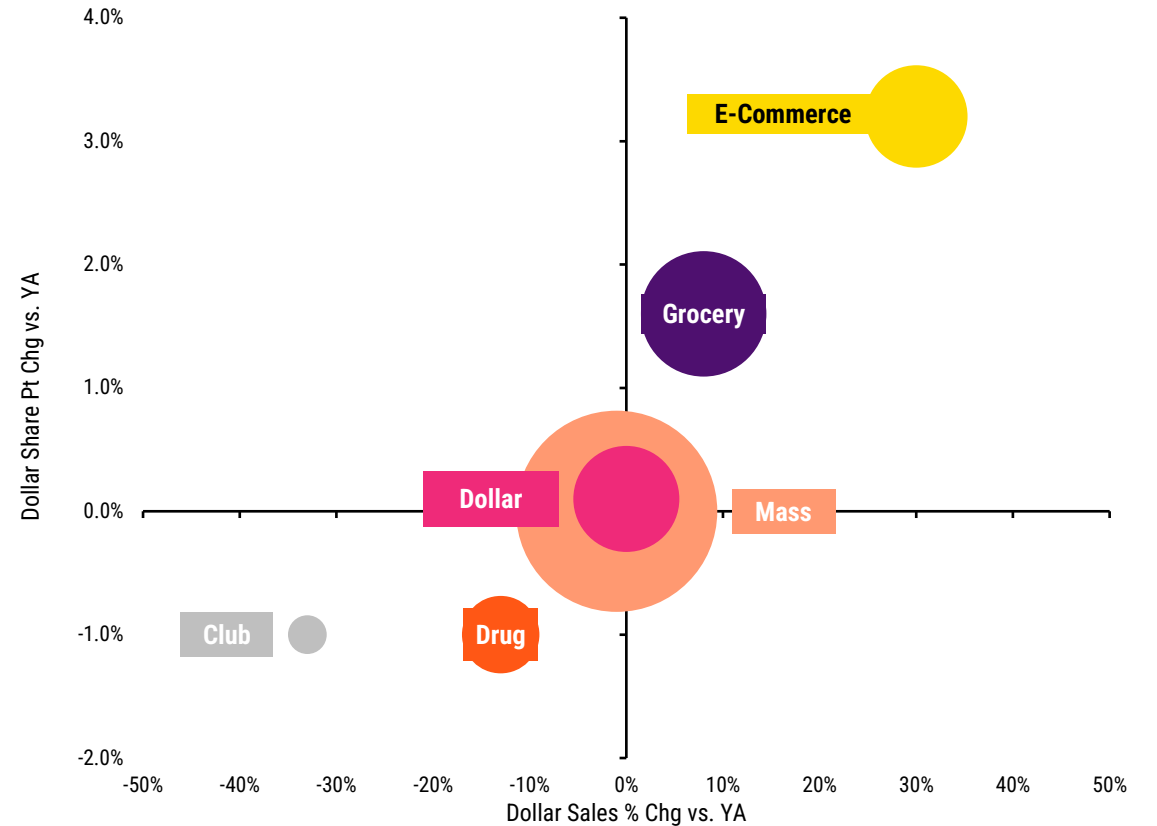
Valentine's Day Chocolate Candy Category Dollar Trends

7 weeks Ending February 15th, 2026



Valentine's Day Non-Chocolate Candy Category Dollar Trends

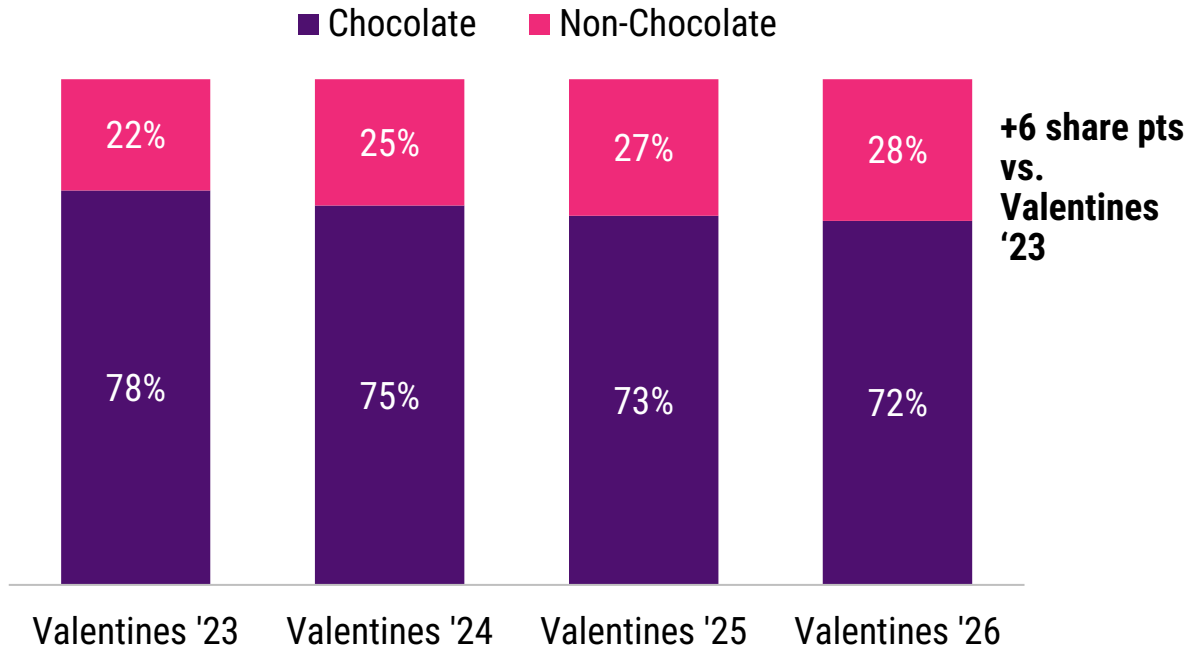
7 weeks Ending February 15th, 2026



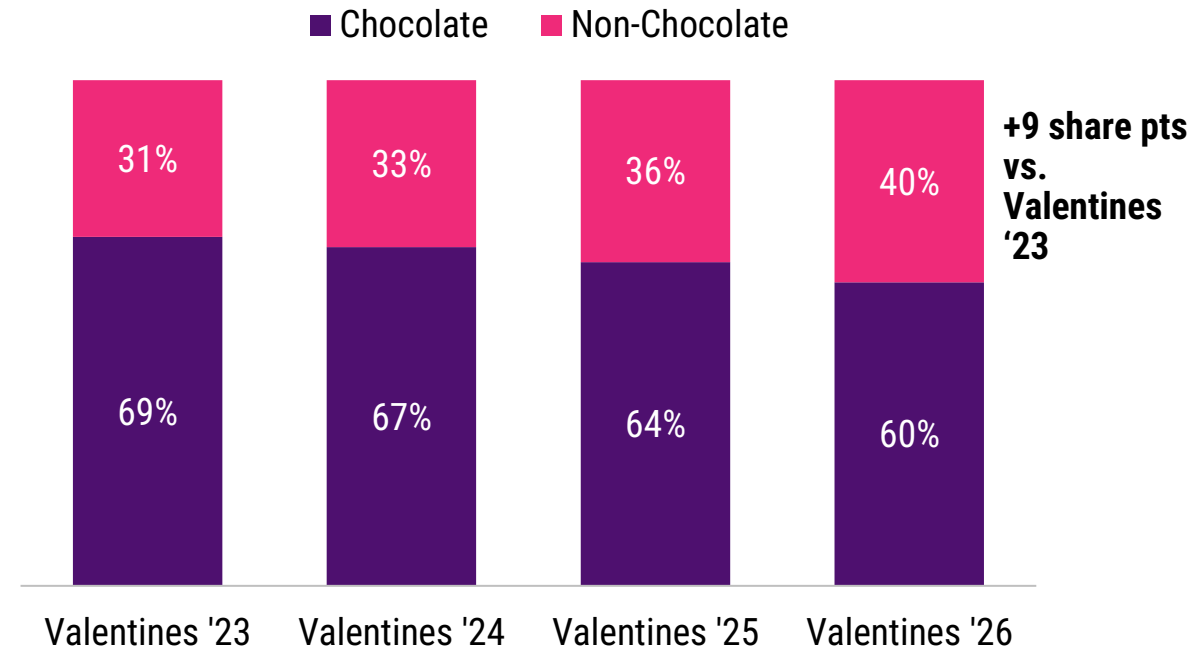
Seasonal non-chocolate Valentine's candy continues to gain share in both volume and dollars



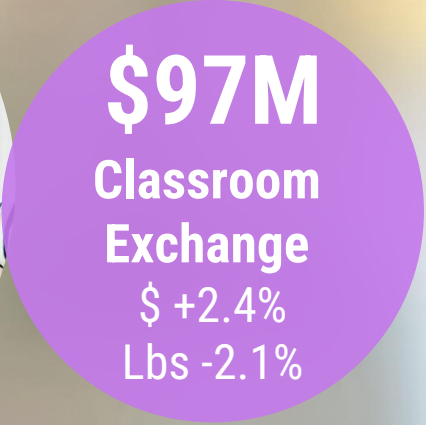
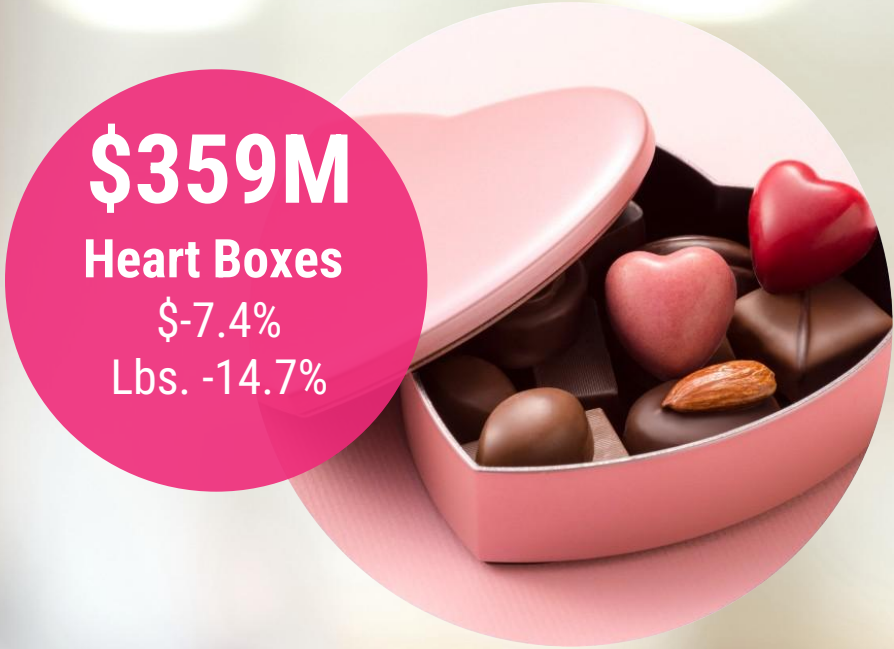
Dollar Share of Seasonal Valentines Candy



Volume Share of Seasonal Valentines Candy



With Valentine's falling on a weekend Heart Boxes struggled



Valentine's Innovation Across Chocolate & Non-Chocolate

Chocolate



Ethel M.
CHOCOLATES

1. **Choose Your Box Size**
You must choose a box size first.
2. **Select Your Chocolates**
3. **Choose Your Design**
4. **Review**

- 2026 Valentine Collection
- Includes customizable boxes and pop-up cards seeking luxury
- Offers 5 different customizable boxes including two Valentines specific ones

Non-Chocolate

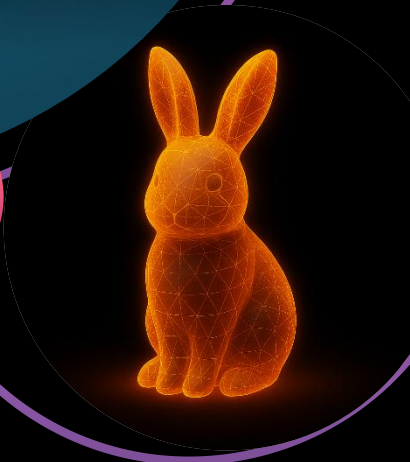


BRACH'S

- Dual Sided Messaging
- Emojis and American Sign Language signal for "I Love You"

Seasonal Trends

Easter 2026



With the shorter Easter season
Dollars and Volume were soft for
Easter 2026



\$1.0B
Easter
Chocolate
\$: -10.2%
lbs: -18.4%



\$565M
Easter
Non-Chocolate
\$: -4.7%
lbs: -8.1%

Top 3 Items in Easter Chocolate Candy

Top Dollar Sales during Easter 2026



Cadbury Mini Eggs 26.5 Oz

Top Dollars/Week Chg vs. 2025



Cadbury Mini Eggs 9 Oz



Reese's Easter Egg 28.8 Oz



Reese's Easter Egg 28.8 Oz



Lindt Bunny & Carrot 1.9 Oz



Kit Kat Bunny 8.85 Oz

Top 3 Items in Easter Non-Chocolate Candy

Top Dollar Sales during Easter 2026



Sweetarts Jelly Bean 12 Oz

Top Dollars/Week Chg vs. 2025



Sweetarts Jelly Bean 12 Oz



Starburst Jelly Bean 14 Oz



Starburst Jelly Bean 14 Oz



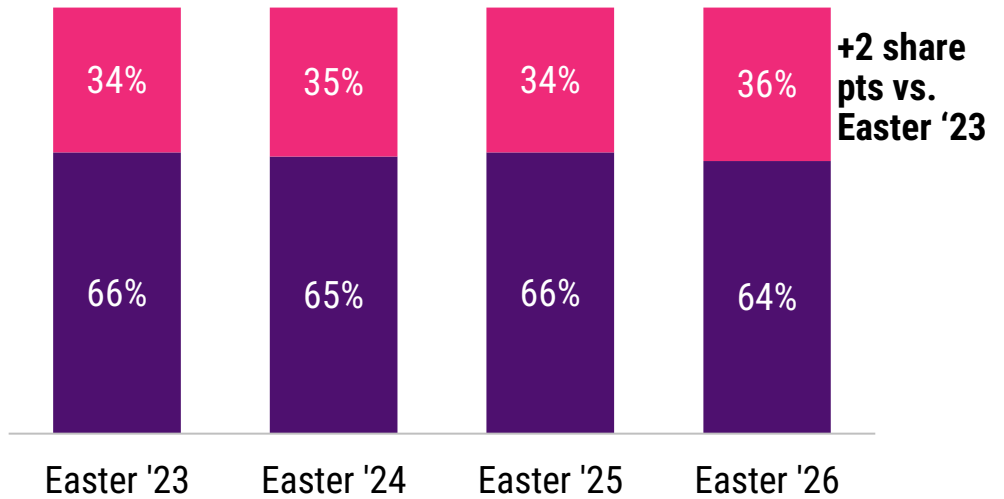
Nerds Jelly Bean 12 Oz



Reese's Pieces 2.2 Oz

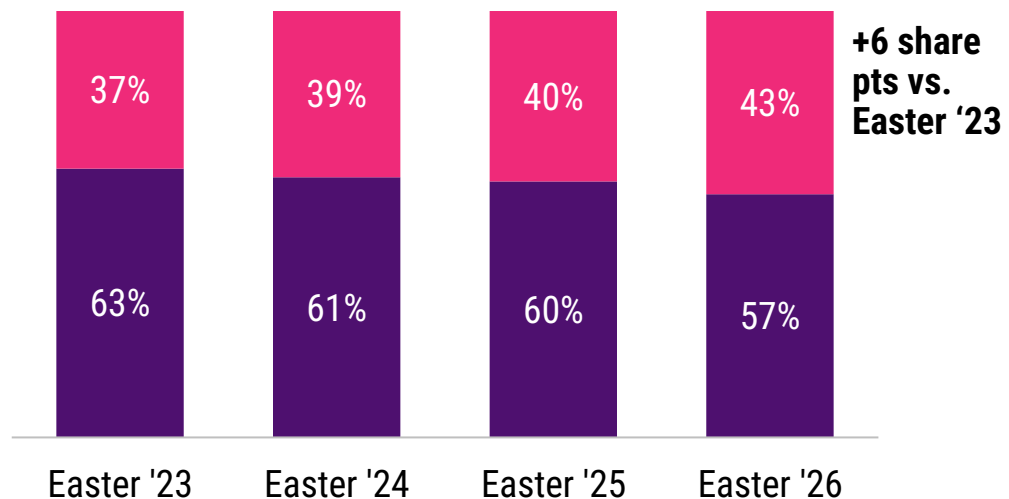
Dollar Share of Seasonal Easter Candy

Chocolate Non-Chocolate



Volume Share of Seasonal Easter Candy

Chocolate Non-Chocolate



Holiday Clash

Super Bowl/Valentine's Day 2027



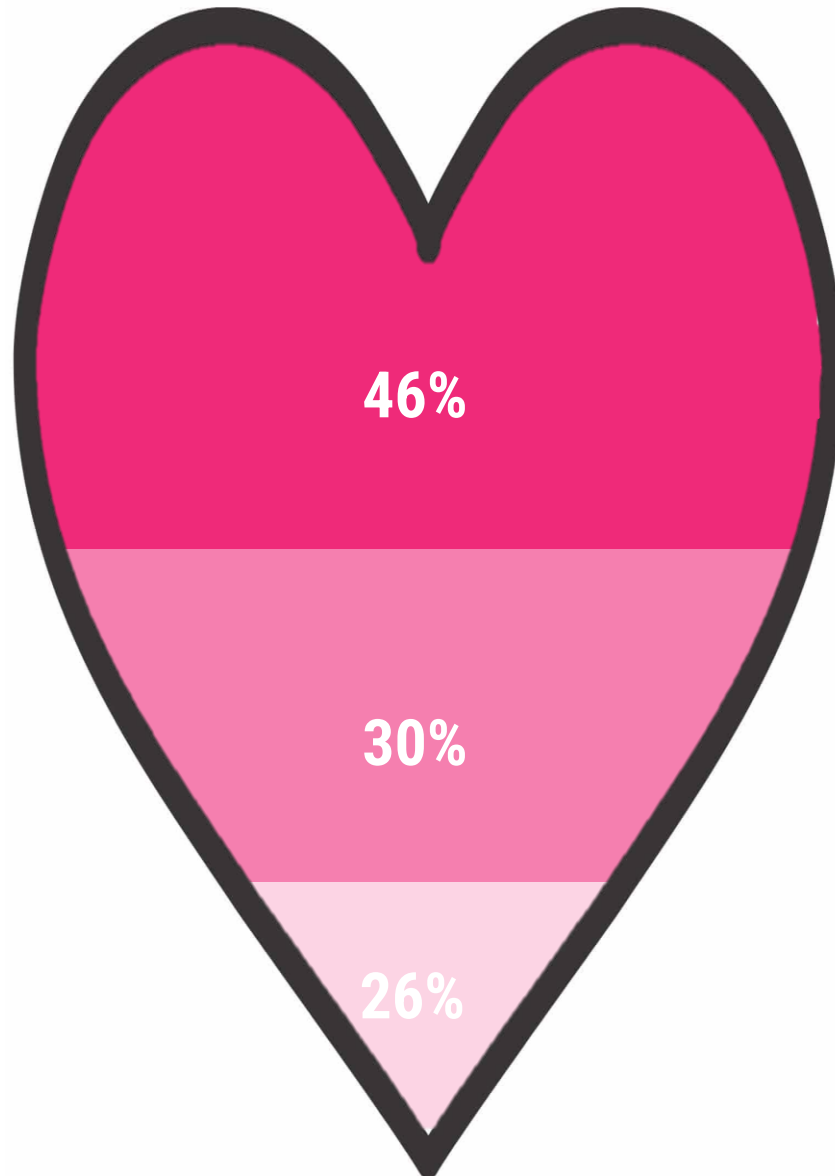
**70% of consumer
participate in both
Super Bowl and
Valentine's Day**

**75% of shoppers are
interested in ideas
that combine both**



Importance of Celebrating Valentine's Day on February 14th

- Somewhat important
- Very important, otherwise, what's the point
- Not at all important, any day around the 14th is fine

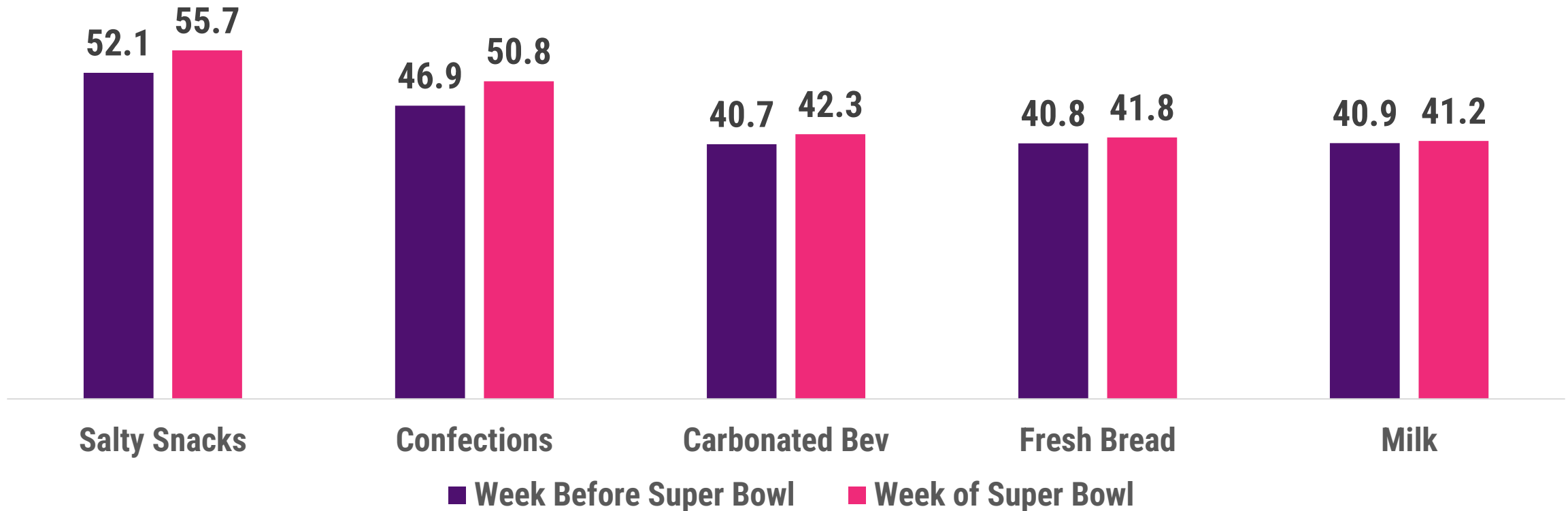


If Valentine's Day conflicts with the Super Bowl or other commitments, consumers are willing to celebrate on a different day

When asked if busy or have a time conflict **34%** said they would **move Valentine's Day** to a different day that worked better

While Super Bowl is snack focused, confections displays strong consumer engagement

Top 5 Categories – % Households Buying



From Party Snacks to Sweet Treats: Display Trends for Super Bowl & Valentine's Day

Top 10 Displayed Categories in Grocery

Super Bowl 2026



Salty Snacks



Carbonated Beverage



Crackers



Chocolate Candy



Non-Chocolate Candy



Bottled Water



Cookies



Snacks Nuts/Seeds



Wine



Fresh Bread

VS.

Valentines 2026



Salty Snacks



Crackers



Carbonated Beverage



Cookies



Chocolate Candy



Non-Chocolate Candy



Bottled Water



Snacks Nuts/Seeds



Fresh Bread

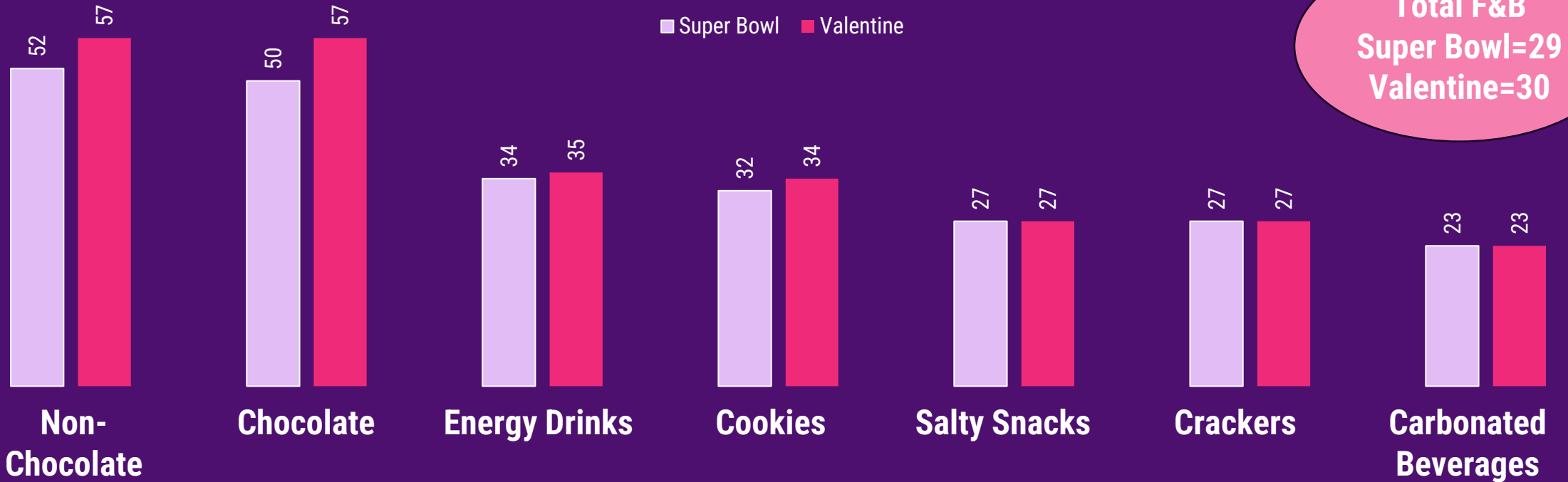


Wine

Both Non-Chocolate and Chocolate are top producing categories when on Display

Dollar Trade Efficiency Display Only for Super Bowl and Valentine Weeks

Ranked by 2026 \$ Trade Efficiency Display only Super Bowl



Total F&B
Super Bowl=29
Valentine=30



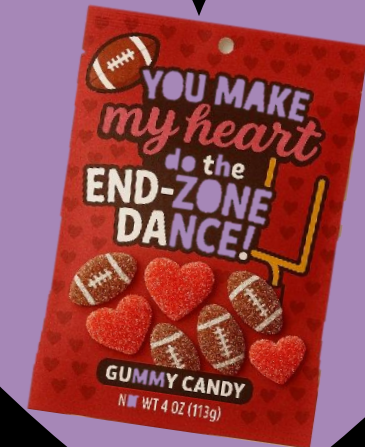
Source: Circana POS, MULO+ with C, 7 Weeks Ending 2-15-2026 and 2 Weeks Ending 2-8-2026

During seasonal periods, confections dominate the seasonal aisle as the primary traffic and excitement driver

Distribution Seasonal Aisle	Valentine	Halloween	Holiday
Chocolate Candy	81.8% ▲	78.8%	77.8%
Non-Chocolate Candy	79.6% ▲	78.6%	76.5%
Decorations/Toppings	30.9% ▲	31.1%	24.5%
Salty Snacks	28.1% ▼	38.2%	39.3%
Baking Needs	24.5% ▼	26.9%	29.4%
Cookies	23.4% ▼	38.0%	63.5%
Other Snacks	22.1%	28.5%	48.9%

Manufacturers can score big on love with integrated products and packaging

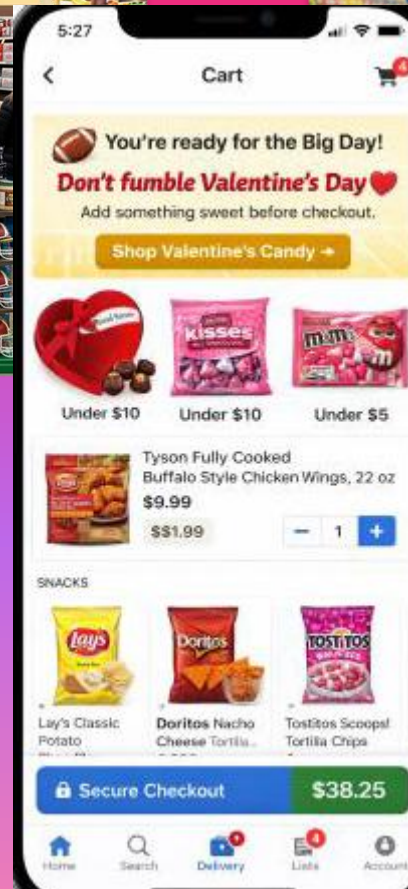
The Super Bowl/Valentine's Day overlap provides opportunities for products that could draw football fans into Valentine's Day with interactive and football-themed options



*Products generated through AI



Displays That Feature Multiple Special Events Can Help Drive Growth Across Several Categories



**Displays generated through AI*

Key takeaways to maximize seasonal sales

- 01 Economy continues to impact consumer behavior
- 02 Communicate and market to exclusive consumers groups and entice to shop different varieties and purchase throughout the year
- 03 Engage early in the season to consumers for early buys and likely repeats
- 04 Consumers plan to participate with both the Super Bowl and Valentine, creating an overlap audience
- 05 Confections owns the Valentine aisle, let's use it to our advantage

— Thank you —





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