Euromonitor International

Snacks in Australia

October 2026

Table of Contents

EXECUTIVE SUMMARY

2026 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Snacks

INDUSTRY PERFORMANCE

Value Growth Remains Resillient Amid Affordability Pressures and Modest Volume Gains

Manufacturers Expand Core Ranges to Capture Everyday Occasions

Stapling of Snacks Drives Resilience Amid Cost-Of-Living Pressures

Chart 2 - Value Sales 2021-2031

Chart 3 - Value Sales by Category 2026

Chart 4 - Cadbury Maintains Accessible Price Points through Pack-Architecture Management

WHAT'S NEXT?

Private Label to Gain Traction as Undifferentiated, Mid-Tier Brands Risk Losing Ground

Branded Manufacturers Refresh Portfolios to Defend Relevance and Margin

Chart 5 - Forecast Value Sales 2021-2031

Chart 6 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Top Global Players Strengthen Leadership through Entrenched Brands

Chart 7 - Analyst Insight for Snacks

Chart 8 - Company Shares 2026

Chart 9 - Brand Shares 2026

CHANNELS

Supermarkets Maintain Leadership as E-Commerce Narrows the Gap

Premium Chocolatiers Use Experiential Retail to Expand Reach

E-Commerce Captures Planned Snack Occasions with Multipack Focus

Foodservice Recovers with Experiential Consumption as Retail Leads

Chart 10 - Retail Channels 2021-2026

PRODUCTS

Arnott’S and Cadbury Defend Relevance and Affordability with Lighter Formats and Pack-Size Reductionmultipack Formats

Private Label Accelerates Competition as Brands Polarise on Value and Experience

Chart 11 - Arnott’S Biscuits Ltd Refreshes Shapes with a Lighter Format to Drive Everyday Consumption

ECONOMIC CONTEXT

Chart 12 - Economic Context for Snacks

Chart 13 - Real Gdp Growth 2021-2031

Chart 14 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 15 - Consumer Context for Snacks

Chart 16 - Population 2021-2031

Chart 17 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Chocolate Confectionery Summary

KEY INDUSTRY TRENDS

Chart 18 - Key Industry Trends for Chocolate Confectionery

INDUSTRY PERFORMANCE

Brands Redefine Value and Premium Positioning to Sustain Demand
Tablets Lead as Seasonal Chocolate and Boxed Assortments Capture Experiential and Occasion-Led Growth
Mondelez Australia Pty Ltd Defends Affordability with Pack-Size Reduction as Haigh Pty Ltd, a E Captures Premium Storytelling
Chart 19 - Value Sales 2021-2031
Chart 20 - Volume Sales 2021-2031
Chart 21 - Value Sales by Category 2026
Chart 22 - Mondelez Australia Pty Ltd Maintains Accessible Price Points through Pack-Architecture Management

WHAT'S NEXT?

Premium Brands to Drive Gifting and Indulgence as Affordability Polarises Choices
Tablets to Retain Top Position as Boxed Assortments Accelerate through Gifting
Mid-Tier Brands to Face Pressure as Polarisation and Premiumisation Reshape Competition
Chart 23 - Forecast Value Sales 2021-2031
Chart 24 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Top Players Secure Leadership through Innovation and Broad Reach
Chart 25 - Analyst Insight for Chocolate Confectionery
Chart 26 - Company Shares 2026
Chart 27 - Brand Shares 2026

CHANNELS

Supermarkets Retain Lead as Retail E-Commerce and Convenience Retailers Rise
Premium Chocolatiers Expand Experiential Retail to Capture Gifting
Online Grocery Platforms Redefine Value and Planned Chocolate Purchases
Experience-Led Consumption Bolsters Foodservice as Retail Leads
Chart 28 - Retail Channels 2021-2026

PRODUCTS

Cadbury Maintains Purchase Frequency by Reducing Pack Sizes
Haigh’S Expands Premium Storytelling to Attract Selective Indulgence
Brand Collaborations and Seasonal Launches Boost Experiential Value
Chart 29 - Craft Meets Scale: Haigh’S Expands Premium Storytelling with “Best of Australia” Launch

ECONOMIC CONTEXT

Chart 30 - Economic Context for Chocolate Confectionery
Chart 31 - Real Gdp Growth 2021-2031
Chart 32 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 33 - Consumer Context for Chocolate Confectionery
Chart 34 - Population 2021-2031
Chart 35 - Consumer Expenditure 2021-2031
Chart 36 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Gum in Australia

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Gum Summary

INDUSTRY PERFORMANCE

Volume Softens as Value Grows Due to Higher Unit Prices
Humour-Led Campaigns Drive Brand Differentiation and Engagement with Gen Z
Chart 37 - Mentos Cube Leverages a Gen Z Shift toward Insight-Driven Gum Marketing
Chart 38 - Value Sales 2021-2031
Chart 39 - Volume Sales 2021-2031
Chart 40 - Value Sales by Category 2026

WHAT'S NEXT?

Functional Benefits and Wellness Repositioning Attract New Demand Sources
Glp-1 Adoption and Gen Z Preferences Drive Brand Innovation
Chart 41 - Forecast Value Sales 2021-2031
Chart 42 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Mars Strengthens Dominance through Brand Depth and Limited Rivalry
Chart 43 - Company Shares 2026
Chart 44 - Brand Shares 2026

CHANNELS

Supermarkets Retain Leadership as Online Gains on Planned Purchases
Chart 45 - Retail Channels 2021-2026

ECONOMIC CONTEXT

Chart 46 - Economic Context for Gum
Chart 47 - Real Gdp Growth 2021-2031
Chart 48 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 49 - Consumer Context for Gum
Chart 50 - Population 2021-2031
Chart 51 - Consumer Expenditure 2021-2031
Chart 52 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Sugar Confectionery in Australia

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sugar Confectionery Summary

KEY INDUSTRY TRENDS

Chart 53 - Key Industry Trends for Sugar Confectionery

INDUSTRY PERFORMANCE

Gummies and Jellies to Drive Sales Amid Modest Growth
Gummies and Jellies Maintains Lead as Chewy Candies Accelerates
Funday Leverages Cross-Category Partnerships to Drive Novelty-Led Sales
Chart 54 - Value Sales 2021-2031
Chart 55 - Volume Sales 2021-2031
Chart 56 - Value Sales by Category 2026
Chart 57 - Brand Collaborations Gain Momentum in Australia'S Confectionery Market, with Funday at the Forefront

WHAT'S NEXT?

Gummies and Chewy Candies to Sustain Growth through Playful Innovation
Licensed Ip and Health Cues Broaden Appeal but Do Not Replace Indulgence
Chart 58 - Forecast Value Sales 2021-2031
Chart 59 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Top Players Defend Leadership as Niche Local Brand Funday ?Leverages Health-Led Innovation
Chart 60 - Analyst Insight for Sugar Confectionery
Chart 61 - Company Shares 2026
Chart 62 - Brand Shares 2026

CHANNELS

Supermarkets Retain Dominance as Convenience Retailers' Share Declines
Online Grocery Expands through Basket Integration, Not Impulse Shopping
Chart 63 - Retail Channels 2021-2026

PRODUCTS

Better-For-You Challengers Expand Reach with Functional and Cleaner Label Products

ECONOMIC CONTEXT

Chart 64 - Economic Context for Sugar Confectionery
Chart 65 - Real Gdp Growth 2021-2031
Chart 66 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 67 - Consumer Context for Sugar Confectionery
Chart 68 - Population 2020-2030
Chart 69 - Consumer Expenditure 2020-2030
Chart 70 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Ice Cream in Australia

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Ice Cream Summary

KEY INDUSTRY TRENDS

Chart 71 - Key Industry Trends for Ice Cream

INDUSTRY PERFORMANCE

Take-Home Ice Cream Delivers Affordable Indulgence and Drives Premium Growth
Impulse and Plant-Based Choices Outpace Core Formats in Growth

Streets Leverages Collaborations to Refresh Brand Relevance
Chart 72 - Value Sales 2021-2031
Chart 73 - Volume Sales 2021-2031
Chart 74 - Value Sales by Category 2026
Chart 75 - Streets Leverages Cross-Category Collaborations to Refresh Familiar Ice Cream

WHAT'S NEXT?

Premium Brands Prioritise Margin as Indulgence Drives Value Gains
Plant-Based Innovation Captures New Demand
Rising Food Expenditure Sustains Premiumisation and Format Innovation
Chart 76 - Forecast Value Sales 2021-2031
Chart 77 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Top Players Leverage Portfolio Breadth to Secure Leadership
Chart 78 - Analyst Insight for Ice Cream
Chart 79 - Company Shares 2026
Chart 80 - Brand Shares 2026

CHANNELS

Supermarkets Retains Dominance as Premium Brands Expand Reach
Messina Leverages Dual Channel Strategy to Drive Premium Growth
Post-Pandemic Foodservice Growth Stalls
Chart 81 - Retail Channels 2021-2026

PRODUCTS

Bulla Upgrades At-Home Indulgence to Capture Premium Demand
Chart 82 - Bulla’S Murray Street Brings Parlour-Style Ice Cream Home Amid Cost-Of-Living Pressures

ECONOMIC CONTEXT

Chart 83 - Economic Context for Ice Cream
Chart 84 - Real Gdp Growth 2021-2031
Chart 85 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 86 - Consumer Context for Ice Cream
Chart 87 - Population 2021-2031
Chart 88 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Savoury Snacks in Australia

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Savoury Snacks Summary

KEY INDUSTRY TRENDS

Chart 89 - Key Industry Trends for Savoury Snacks

INDUSTRY PERFORMANCE

Manufacturers Drive Everyday Snacking as Routine Replaces Impulse
Smith’S and Doritos Boost Value with Flexible Pack Innovation
Chart 90 - Doritos Addresses Affordability through Format and Pack Innovation

Protein-Led Snacking Pushes Nuts and Trail Mixes Ahead in Growth
Chart 91 - Value Sales 2021-2031
Chart 92 - Volume Sales 2021-2031
Chart 93 - Value Sales by Category 2026

WHAT'S NEXT?

Private Label to Extend Value Formats as Brands Invest in Flavour and Texture
Protein Cues and Meal Replacement to Drive Nuts, Seeds and Trail Mixes and Meat Snacks Forward
Flexible Packs and Routine Snacking to Reshape Product Innovation
Chart 94 - Forecast Value Sales 2021-2031
Chart 95 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Top Players Leverage Portfolio Strength to Maintain Leadership
Chart 96 - Analyst Insight for Savoury Snacks
Chart 97 - Company Shares 2026
Chart 98 - Brand Shares 2026

CHANNELS

Supermarkets Lead as Non-Grocery and Retail E-Commerce Gains Traction
Retail E-Commerce Accelerates as Shoppers Seek Convenience and Choice
Meat Snacks and Premium Popcorn Diversify through Non-Grocery and Online
Chart 99 - Retail Channels 2021-2026

PRODUCTS

Arnott's Biscuits Ltd Reframes Snacking for Everyday Routines with Expanded Shapes Offering
Chart 100 - Arnott’S Biscuits Ltd Refreshes Shapes with a Lighter Format to Drive Everyday Consumption

ECONOMIC CONTEXT

Chart 101 - Economic Context for Savoury Snacks
Chart 102 - Real Gdp Growth 2021-2031
Chart 103 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 104 - Consumer Context for Savoury Snacks
Chart 105 - Population 2021-2031
Chart 106 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

Sweet Biscuits, Snack Bars and Fruit Snacks in Australia

KEY DATA INSIGHTS

2026 DEVELOPMENTS

Sweet Biscuits, Snack Bars and Fruit Snacks Summary

KEY INDUSTRY TRENDS

Chart 107 - Key Industry Trends for Sweet Biscuits, Snack Bars and Fruit Snacks

INDUSTRY PERFORMANCE

Solid Value Growth Amid Cost-Of-Living Pressures
Tim Tam Leverages Small Formats to Meet Affordability Demand
Chart 108 - Tim Tam Uses Twin Packs to Support Affordable, Controlled-Spend Snacking
Routine Snacking and Format Innovation Drive Competitive Intensity

Chart 109 - Value Sales 2021-2031
Chart 110 - Volume Sales 2021-2031
Chart 111 - Value Sales by Category 2026

WHAT'S NEXT?

Sweet Biscuits to Lead Volume as Snack Bars Drives Growth
Premium and Value Brands Intensify Competition with Contrasting Strategies
Portion Control and Clean Labels Reshape Everyday Snacking Routines
Chart 112 - Forecast Value Sales 2021-2031
Chart 113 - Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Arnott's Biscuits Ltd Strengthens Its Position as Private Label Remains Resilient
Chart 114 - Analyst Insight for Sweet Biscuits, Snack Bars and Fruit Snacks
Mid-Sized Players Capture Growth by Targeting Health Trends
Chart 115 - Company Shares 2026
Chart 116 - Brand Shares 2026

CHANNELS

Supermarkets Sustains Leadership as Retail E-Commerce Gains Momentum
Retail E-Commerce Expands with Multipacks and Planned Purchases
Chart 117 - Retail Channels 2021-2026

PRODUCTS

Snackhq Targets Everyday Routines to Boost Repeat Purchases
Chart 118 - Snackhq Illustrates the Shift toward Everyday, Staple-Led Snacking

ECONOMIC CONTEXT

Chart 119 - Economic Context for Sweet Biscuits, Snack Bars and Fruit Snacks
Chart 120 - Real Gdp Growth 2021-2031
Chart 121 - Inflation 2021-2031

CONSUMER CONTEXT

Chart 122 - Consumer Context for Sweet Biscuits, Snack Bars and Fruit Snacks
Chart 123 - Population 2021-2031
Chart 124 - Consumer Expenditure 2021-2031
Chart 125 - Population by Generation 2026

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with

country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-australia/report.