

## **Energy Bar - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-02 | 130 pages | Mordor Intelligence

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### **Report description:**

Energy Bar Market Analysis

The energy bar market reached USD 4.12 billion in 2025 and is forecast to advance to USD 6.01 billion by 2030, reflecting a 7.84% CAGR over the period. Product innovation is increasingly influenced by the rising consumer demand for convenient nutrition, transparent ingredient lists, and plant-based protein alternatives. Regulatory developments, such as the U.S. Food and Drug Administration's revised definition of "healthy," which imposes stricter limits on added sugars and sodium, are compelling manufacturers to prioritize nutrient-dense product formulations. The competitive landscape is undergoing significant transformation due to consolidation activities among leading multinational snack companies. At the same time, tariff-induced fluctuations in the cost of pea protein and other critical raw materials are exerting downward pressure on profit margins. The accelerated adoption of e-commerce platforms is enabling companies to expand their direct-to-consumer channels effectively. Additionally, the growing middle-class population in the Asia-Pacific region is driving substantial growth in regional demand, presenting lucrative opportunities for market players.

Global Energy Bar Market Trends and Insights

Innovative formulations and clean-label ingredients attract health-conscious consumers

Clean-label reformulation has become a strategic priority for manufacturers as they navigate regulatory changes and growing consumer demand for transparency in ingredient lists. Effective February 2025, the FDA's updated "healthy" claim guidelines will

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require products to meet specific food group criteria and limit added sugars in line with WHO's recommendation of less than 10% of total energy intake. This regulatory shift aligns with EFSA's approval of innovative ingredients, such as isomaltulose syrup, which offers manufacturers a solution to reduce glycemic impact without compromising product taste. To enhance differentiation in competitive retail markets, manufacturers are increasingly leveraging functional ingredients like tiger nut oil, recently approved by EFSA for its high oleic acid content. Additionally, brands are emphasizing sustainably sourced ingredients, including responsibly farmed cocoa and Fairtrade palm oil, to strengthen their sustainability credentials. These clean-label initiatives are critical for building consumer trust, particularly among millennials, who frequently use digital tools to verify ingredient lists at the point of sale.

#### Rising demand for quick energy-boosting snacks fuels market growth

Post-pandemic lifestyle changes have significantly accelerated the trend of on-the-go consumption, leading to a transformation in snacking occasions and consumer expectations for products. In 2024, U.S. consumers reported following a 20% high-protein diet, according to the International Food Information Council. This shift in dietary preferences aligns strategically with the positioning of energy bars as viable meal replacement options, particularly in urban markets where busy lifestyles and time constraints drive the demand for convenient food solutions. The European Commission's agricultural outlook, which extends through 2035, projects a notable increase in plant protein consumption alongside a decline in meat consumption. This evolving dietary landscape creates a favorable environment for the development and adoption of plant-based energy bar formulations. Furthermore, the quick energy benefits of protein bars are supported by scientific research from the NIH, which demonstrates that protein bars provide a more sustained energy release compared to snacks high in simple carbohydrates. This positions them as an ideal choice for both athletic performance and workplace productivity. Additionally, national dietary guidelines that encourage the consumption of nutrient-dense convenience foods further reinforce the growing trend toward functional snacking, presenting significant opportunities for market growth.

#### Volatile raw material prices disrupting cost structure

The energy bar market faces disruptions from fluctuating raw material prices and evolving regulatory standards. The U.S. Department of Commerce's hefty 122.19% antidumping duties on imports of Chinese pea protein underscore the volatility of raw material costs. This move has compelled manufacturers to not only rethink their supply chains but also grapple with steep cost hikes. Meanwhile, the European Parliament's scrutiny of the EU's food system dependencies has spotlighted vulnerabilities, especially in light of geopolitical tensions. Their findings advocate for a broader diversification of input sources and a boost in domestic production to curtail reliance on imports. In response, manufacturers are leaning towards vertical integration and forging long-term contracts with suppliers. However, these strategies come with hefty capital investments and could constrain formulation adaptability.

Other drivers and restraints analyzed in the detailed report include:

Increasing sports and fitness activities drive consumption among athletes / Demand for convenient and healthy on-the-go snacking / Sugar content and artificial additives spark health related concerns /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

In 2024, conventional energy bars continue to dominate the market, holding a significant 78.11% share. In contrast, organic alternatives are witnessing notable growth, with a strong 8.50% CAGR projected through 2030. This trend highlights an increasing consumer preference for premium products that emphasize transparency in sourcing and superior quality. Conventional energy

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bars benefit from well-established manufacturing efficiencies and expansive distribution networks, which enable them to maintain competitive pricing. This pricing strategy effectively meets the needs of both cost-conscious consumers and large-scale institutional buyers, ensuring their sustained market leadership.

Although organic energy bars account for a smaller share of the market by volume, they command higher price points due to consumers' willingness to pay a premium for products associated with health benefits and environmental sustainability. However, the organic segment faces several significant challenges. Strict organic certification requirements and the limited availability of certified ingredients complicate product formulation and drive up production costs, potentially slowing the segment's broader adoption. Additionally, the growth of organic energy bars is further hindered by the increasing prominence of regenerative agriculture marketing. This approach focuses on sustainability benefits without adhering to the rigorous standards of organic certification, which could lead to fragmentation within the premium segment and create additional competition for organic products.

In 2024, plant-based protein sources maintain a dominant position, accounting for 54.36% of the market share. However, animal-based protein alternatives are expected to grow at a faster pace, with a projected compound annual growth rate (CAGR) of 7.92% through 2030. This trend reflects a notable shift in consumer preferences, driven by advancements in product formulations and an increasing demand for a broader range of protein options. The rising popularity of veganism continues to fuel the growth of the plant-based protein market. On the other hand, animal-based proteins, valued for their superior amino acid profiles and strong consumer acceptance, are positioned for significant growth in the coming years.

Animal-based protein formulations benefit greatly from the well-established infrastructure of the dairy industry, which ensures consistent protein quality and efficient supply chain operations. However, these formulations face challenges, including growing concerns about sustainability and potential regulatory pressures from environmental advocacy groups. The evolving market landscape reveals a bifurcated scenario: plant-based protein products are gaining traction among environmentally-conscious consumers, while animal-based alternatives remain the preferred choice for applications that require high-performance protein solutions, such as sports nutrition and specialized dietary needs.

The Energy Bar Market Report is Segmented by Product Type (Organic and Conventional), Protein Source (Plant-Based and Animal-Based), Function/Application (Sports and Endurance Nutrition, Meal Replacement, and More), Distribution Channel (Supermarkets/Hypermarkets, Convenience Stores, and More), and Geography (North America, Europe, Asia-Pacific, South America and More). The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

In 2024, North America holds a leading 41.12% share of the energy bar market, driven by a well-established health and wellness culture, advanced retail infrastructure, and regulatory frameworks that foster innovation in functional foods. The FDA's updated "healthy" claim criteria provide manufacturers with clear guidelines for product positioning, enabling them to emphasize nutritional benefits effectively. The region's mature market is defined by high consumer awareness of nutritional labeling, strong distribution networks, and acceptance of premium pricing, which supports innovation. However, branded manufacturers face challenges such as market saturation in core demographics and rising competition from private label products.

Asia-Pacific is the fastest-growing region, with a projected CAGR of 9.85% through 2030. This growth is fueled by increasing middle-class incomes, urbanization, and heightened health awareness in key markets like China, Vietnam, and Thailand. China's expanding food processing industry and growing consumer demand for healthier, premium products create a favorable environment for the energy bar market. While government initiatives promote healthy eating, regulatory complexities and varying food safety standards across countries pose challenges. For instance, India's extension of FSSAI registration requirements for foreign food manufacturers to September 2024 highlights the evolving regulatory landscape.

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Europe represents a significant market, characterized by consumer preferences for organic and sustainably-sourced products. However, growth rates are more moderate compared to emerging regions due to market maturity. The European Commission's Vision for Agriculture and Food, which emphasizes sustainable and competitive food production, supports the growth of energy bars that meet environmental and nutritional standards. EFSA's stringent novel food approval processes and health claim regulations create entry barriers but also offer competitive advantages for compliant products. Meanwhile, South America, the Middle East, and Africa present emerging opportunities driven by urban population growth and rising disposable incomes. However, infrastructure limitations and regulatory uncertainties constrain short-term growth potential in these regions.

List of Companies Covered in this Report:

Mars Inc. / Mondelez International Inc. / General Mills Inc. / Nestle S.A. / Post Holdings / Glanbia plc / Abbott Laboratories. / The Hershey Company / PepsiCo, Inc. / Lotus Bakeries / The Simply Good Foods Company / Otsuka Holdings Co., Ltd. / Wholesome Habits Pvt Ltd / Munk Pack, Inc. / The Hain Celestial Group / Pure Protein, LLC / NuGo Nutrition Inc. / Built Brands LLC. / Ferrero Group / USANA Health Sciences, Inc. / FitLife Brands, Inc. / Kindelicious Foods Private Limited /

Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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