

Cookies - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Cookies Market Analysis

The cookies market was valued at USD 16.38 billion in 2025 and estimated to grow from USD 17.15 billion in 2026 to reach USD 21.55 billion by 2031, at a CAGR of 4.68% during the forecast period (2026-2031). Growth rests on steady snacking demand, a pivot to premium lines, and health-focused reformulations that keep indulgence relevant while aligning with new labeling rules [fda.gov](https://www.fda.gov). Conventional formats still dominate sales, yet portion-controlled, fortified, and plant-based varieties capture incremental value that lifts the overall cookies market despite raw-material inflation. Digital commerce, especially brand-run subscription programs, deepens consumer reach and offsets shelf-space limits in modern retail. Meanwhile, strategic mergers signal the need for scale to absorb higher compliance costs and volatile ingredient pricing.

Global Cookies Market Trends and Insights

Rising Demand for Portion-Controlled Indulgence Snacks

Consumer behavior analysis reveals a strategic shift toward portion-controlled indulgence as health-conscious consumers seek guilt-free satisfaction without complete category abandonment. This trend manifests in the rapid expansion of single-serve packaging formats and mini-cookie varieties that allow controlled consumption while maintaining the emotional satisfaction associated with cookie consumption. The FDA's new "healthy" food labeling rules, effective February 2028, will require foods to meet specific criteria for food group equivalents and limits on saturated fat, sodium, and added sugars, compelling manufacturers

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to reformulate products for smaller portion sizes that meet regulatory thresholds. Major food companies report that portion-controlled products command premium pricing while reducing per-unit ingredient costs, creating favorable margin dynamics that support sustained investment in this segment. The trend particularly resonates with millennial and Gen Z consumers who prioritize mindful eating practices while maintaining lifestyle flexibility.

Accelerated Urban On-the-Go Breakfast Culture in Metropolitan Hubs

Metropolitan lifestyle evolution drives fundamental changes in breakfast consumption patterns, with traditional sit-down meals increasingly replaced by portable, convenient options that fit compressed morning schedules. This transformation particularly impacts Asia-Pacific markets, where rapid urbanization and extended commuting times create demand for grab-and-go breakfast solutions that provide sustained energy and satisfaction. Cookies positioned as breakfast alternatives benefit from this trend, especially varieties fortified with proteins, fibers, and essential nutrients that address nutritional concerns while maintaining convenience. The phenomenon extends beyond traditional breakfast cookies to include premium artisanal varieties that serve as meal replacements for time-constrained professionals. The market players are launching new breakfast cookies in the market, owing to the rising demand across the world. For instance, in January 2024, Olyra Foods introduced fruit-filled breakfast biscuits. The soft-baked snacks contain ancient Greek grains and are available in strawberry and raspberry flavors. The products feature high fiber content and low sugar levels.

Raw Material Price Volatility Affecting Cookie Margins

Commodity price instability creates sustained margin pressure as key ingredients experience significant cost fluctuations that manufacturers struggle to pass through to consumers without damaging volume performance. Cocoa prices surged 35% between 2021 and 2023, while sugar costs increased 33% during the same period, creating input cost inflation that outpaced consumer price acceptance in many markets, according to the World Bank. General Mills reported input cost inflation of 3-4% for fiscal 2025, necessitating cost savings initiatives of 4-5% of cost of goods sold to maintain profitability. The volatility particularly impacts smaller manufacturers who lack hedging capabilities and supply chain scale to absorb cost fluctuations, potentially accelerating market consolidation as companies seek operational efficiencies through merger and acquisition activities. Agricultural commodity markets face additional pressure from geopolitical tensions, climate change impacts, and biofuel demand that competes with food applications, suggesting sustained volatility rather than temporary disruption.

Other drivers and restraints analyzed in the detailed report include:

Fortification and Nutrient Enhancement Drive Cookies Market Growth
Gifting and Premiumization as Emotional Positioning
Stricter HFSS Labeling Hindering Growth

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

Segment Analysis

Butter/shortbread and plain cookies maintain market leadership with 33.12% share in 2025, reflecting consumer preference for familiar flavors and textures that deliver consistent satisfaction across diverse demographic segments. However, bar cookies emerge as the fastest-growing segment at 5.85% CAGR through 2031, driven by portion-control trends and nutritional transparency that aligns with health-conscious consumption patterns. This growth trajectory suggests fundamental shifts in consumer expectations, where convenience and nutritional awareness increasingly influence purchasing decisions over traditional taste preferences alone.

The molded/drop cookies segment benefits from manufacturing efficiency and flavor versatility, enabling cost-effective production

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of diverse varieties that appeal to different taste preferences and dietary requirements. Sandwiches and cream-filled cookies maintain steady performance through premium positioning and indulgent positioning that appeals to treat-seeking consumers, while wafer and rolled cookies capture niche markets through unique textures and premium ingredients. The market players have been innovating new types of cookies in the market. For instance, in March 2025, NuStef Baking launched TeaFusions Waffle Cookies in four flavors: Chai Apple, Black Tea and Currant, Earl Grey and Passion Fruit, and White Tea and Peach.

The conventional cookie category commands overwhelming market dominance at 91.70% share in 2025, reflecting mainstream consumer preferences and established manufacturing infrastructure that supports cost-effective production and distribution. Despite this dominance, the free-from segment accelerates at 6.55% CAGR through 2031, indicating substantial growth opportunities for manufacturers willing to invest in specialized formulations and supply chain capabilities. This growth disparity suggests market bifurcation, where conventional products serve mass-market needs while free-from varieties capture premium segments with specific dietary requirements or lifestyle preferences.

Free-from product development requires sophisticated ingredient sourcing and manufacturing processes to achieve acceptable taste, texture, and shelf life characteristics without traditional binding agents, flavor enhancers, and preservatives. The segment benefits from increasing awareness of food allergies, dietary restrictions, and lifestyle choices such as veganism that drive demand for specialized products. Success in free-from categories demands premium pricing strategies to offset higher ingredient and processing costs, while building consumer education and trust around product quality and nutritional benefits. The EU's regulation on contaminant levels in food, including cookies, emphasizes strict standards to protect vulnerable populations, creating additional compliance requirements that benefit established manufacturers with robust quality control systems.

The Cookies Market is Segmented Into Product Type (Bar Cookies, Molded/Drop Cookies, and More), Category (Conventional and Free-From), Distribution Channels (Supermarkets/Hypermarkets, Convenience Stores, and More), Packaging Type (Pouches, Sachets, Cartons, and Others), and Geography (North America, Europe, Asia-Pacific, South America, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Europe maintains market leadership with a 29.85% share in 2025, supported by established cookie consumption traditions, premium product positioning, and regulatory frameworks that emphasize quality over volume growth. The region benefits from diverse national preferences that create opportunities for both local specialties and international brands, while sophisticated retail infrastructure and high disposable incomes support premium pricing strategies. European manufacturers leverage heritage positioning and artisanal craftsmanship to differentiate products in competitive markets, while regulatory compliance capabilities provide advantages in export markets with similar quality standards. The region's mature market characteristics drive innovation toward health-conscious formulations and sustainable packaging that align with consumer environmental awareness and dietary preferences.

South America emerges as the primary growth engine at 6.63% CAGR through 2031, propelled by the rising consumer inclination towards healthy snacking. Consumers are seeking flavorful cookies. Additionally, the market players are expanding their market reach through various strategies like expansions, acquisitions, and others. For instance, in August 2023, Nestle invested USD 550.8 million in its cookies and confectionery manufacturing in Brazil. In Asia-Pacific, China and India represent particularly significant opportunities, with expanding middle-class populations and increasing exposure to international food brands through travel and digital media.

North America faces mature market dynamics with moderate growth expectations, as established consumption patterns and market saturation limit expansion opportunities compared to emerging regions. The market emphasizes innovation through health-conscious formulations, premium positioning, and direct-to-consumer channels that enable margin enhancement despite

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volume constraints. The Middle East and Africa are also showing mature growth in these regions, with regional and global players dominating the market. The market players are launching new products in the market to cater to the rising demand. For Instance, in June 2025, Ben's Cookies launched its mini versions in the United Arab Emirates. The products are available on Talabat.

List of Companies Covered in this Report:

Mondelez International Inc. Ferrero International S.A. Campbell Soup Co. General Mills Inc. PepsiCo Inc. Grupo Bimbo S.A.B. de C.V. Britannia Industries Ltd. Parle Products Pvt. Ltd. Nestle S.A. Anmol Industries Limited Lotus Bakeries NV The Kelloggs Company Bahlsen GmbH and Co. KG Lotte Confectionery Co. Ltd. Unibic Foods India Pvt Ltd Sarjena Food Pvt.Ltd Orkla ASA J and J Snack Foods Corp. Gullon S.A. Barilla Holding S.p.A.

Additional Benefits:

 The market estimate (ME) sheet in Excel format
3 months of analyst support

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