# Global Pretzels Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

# Moving forward, together

Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

**ANDREY SHEVCHENKO,** Managing Partner

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# Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

| Indicator | Value |
| --- | --- |
| Market size (2025) | USD 8.5 bn |
| Forecast (2031) | USD 12.4 bn |
| CAGR (2021-2031) | 6.6% |
| Study period | 2021-2031 |
| Largest region | North America · 42.1% |
| Fastest-growing region | Asia-Pacific · 8.5% |
| Market concentration | Moderate |
| Licence | Individual / Company |

The global pretzels market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. North America retained XX% of global revenue, supported by deep household penetration, national direct-store-delivery networks and premium seasoned brands. Hard pretzels generated XX% of market value, while soft pretzels are gaining through mall, travel, stadium and quick-service channels. Asia-Pacific is the fastest-growing region at an XX% CAGR as international snack formats gain distribution across China, India, Japan, South Korea and Southeast Asia.

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# Executive summary

The global pretzels market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. North America retained XX% of global revenue, supported by deep household penetration, national direct-store-delivery networks and premium seasoned brands. Hard pretzels generated XX% of market value, while soft pretzels are gaining through mall, travel, stadium and quick-service channels. Asia-Pacific is the fastest-growing region at an XX% CAGR as international snack formats gain distribution across China, India, Japan, South Korea and Southeast Asia.

| Indicator | Value |
|---|---|
| Market size 2025 | XXX |
| Forecast 2031 | XXX |
| CAGR | XXX |
| Largest region | XXX |
| Fastest region | XXX |

## Key findings

- The global pretzels market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global market revenue will grow at a XX% CAGR between 2025 and 2031.
- North America accounted for XX% of global market value in 2025.
- Asia-Pacific will record the fastest regional expansion at an XX% CAGR through 2031.
- Hard pretzels represented XX% of 2025 revenue, reflecting their shelf stability and extensive retail distribution.
- Supermarkets and hypermarkets generated XX% of market value, while online retail is the fastest-growing channel at a XX% CAGR.
- SNAC International reported that U.S. pretzel sales increased XX%, unit sales rose XX% and pounds sold grew XX% during 2023.
- U.S. consumers purchased XXX pounds of pretzels worth USD XXX million during Super Bowl week 2024.

# Market size and forecast

### Market value by year, USD bn

| Indicator | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|---|
| Market value, USD bn | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Market volume | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Production | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Imports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Exports | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Apparent consumption | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

### Year-over-year value change

| Indicator | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR |
|---|---|---|---|---|---|---|
| Market value | X% | X% | X% | X% | X% | X% |
| Production | X% | X% | X% | X% | X% | X% |
| Imports | X% | X% | X% | X% | X% | X% |
| Exports | X% | X% | X% | X% | X% | X% |

*Source: XXX*

# Global Pretzels Market Trends and Growth Drivers

Pretzels occupy a distinctive position between traditional bakery products and packaged salty snacks. The category combines the operational efficiency of shelf-stable baked products with an artisanal heritage that supports premium flavors, fresh preparation and strong consumer recognition.

Value growth is moving ahead of underlying volume as brands shift the mix toward heavily seasoned products, filled bites, snack mixes and convenient packs. Retailers continue to support the category because pretzels address sharing, lunchbox, impulse and event-driven occasions without requiring refrigerated merchandising.

The strategic tension is between indulgence and nutritional permission. Pretzels benefit from a baked identity, yet sodium and refined-carbohydrate concerns require formulation investment. Manufacturers that preserve crunch, browning and surface flavor while adding fiber, protein or alternative grains will unlock the strongest long-term differentiation.

## Growth drivers

### Bold seasoning accelerates premium pretzel sales

Intense savory, sweet-heat and regionally inspired flavors are increasing purchase frequency and raising revenue per kilogram. Seasoned twists, pieces and snack mixes also provide brands with a faster innovation cycle than traditional salted products and create stronger merchandising opportunities around sports and social occasions.

### Portable snacking expands consumption occasions

Resealable pouches, portion packs and multipacks position pretzels for commuting, school lunches, offices and travel. Their baked identity and low-mess format give pretzels a practical advantage in occasions where fried snacks, confectionery or fresh bakery products are less convenient.

### Digital commerce scales specialist brands

Online grocery, marketplaces and direct-to-consumer channels allow gluten-free, organic and strongly flavored brands to build national reach before obtaining full supermarket distribution. Digital discovery also supports variety packs and higher-value bundles that improve realized pricing.

### Foodservice traffic supports soft pretzels

Airports, malls, stadiums, cinemas and amusement venues provide high-visibility consumption occasions for freshly baked soft pretzels. Franchise networks capture premium pricing through aroma-led preparation, customization, dips and beverage attachments.

### Baked positioning attracts health-conscious snackers

Pretzels benefit from a baked rather than fried proposition and can be formulated with whole grains, reduced fat and simplified ingredient lists. Manufacturers are extending this advantage with lower-sodium recipes, legumes and functional ingredients while preserving crunch.

### International retail penetration broadens the category

Modern grocery, convenience chains and Western-style foodservice are increasing pretzel availability outside the category's established North American and European markets. Local flavors and smaller trial packs are improving conversion among consumers unfamiliar with traditional pretzel formats.

## Restraints

### Sodium scrutiny raises reformulation pressure

Visible surface salt is central to the classic pretzel experience, making sodium reduction technically and commercially sensitive. Regulatory targets and nutrition-led retailer scorecards are pushing manufacturers toward finer salt crystals, flavor enhancers and gradual recipe changes.

### Input-cost volatility compresses margins

Wheat flour, edible oils, seasonings, natural gas, labor and flexible packaging account for a large share of production cost. Smaller manufacturers have less purchasing leverage and face a sharper trade-off between price increases, pack-size reductions and margin retention.

### Snack alternatives compete for shelf space

Pretzels compete directly with potato chips, tortilla chips, crackers, popcorn, nuts and emerging protein snacks for household budgets and retailer facings. Categories with stronger indulgence or protein credentials can reduce pretzel velocity when innovation becomes repetitive.

### Wheat and sesame controls increase complexity

Core pretzel recipes commonly contain wheat, while sesame toppings and shared production lines require disciplined allergen controls. Gluten-free growth requires segregated sourcing, validated sanitation and certification, increasing cost and constraining capacity for smaller suppliers.

# Pretzels Market Driver and Restraint Impact on the Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Bold seasoning accelerates premium pretzel sales | XXX | XXX | XXX |
| Portable snacking expands consumption occasions | XXX | XXX | XXX |
| Digital commerce scales specialist brands | XXX | XXX | XXX |
| Foodservice traffic supports soft pretzels | XXX | XXX | XXX |
| Baked positioning attracts health-conscious snackers | XXX | XXX | XXX |
| International retail penetration broadens the category | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Sodium scrutiny raises reformulation pressure | XXX | XXX | XXX |
| Input-cost volatility compresses margins | XXX | XXX | XXX |
| Snack alternatives compete for shelf space | XXX | XXX | XXX |
| Wheat and sesame controls increase complexity | XXX | XXX | XXX |

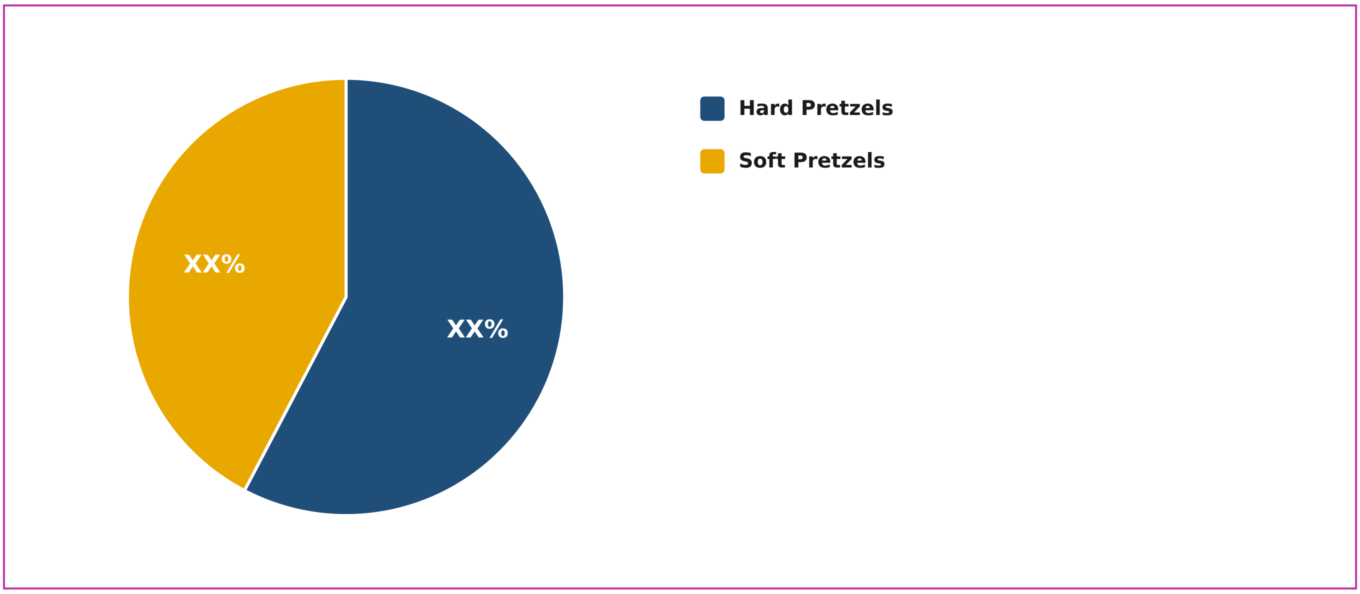
*Source: XXX*

# Pretzels Market Segmentation Analysis by Product, Form, Flavor, Packaging and Channel

## By Product Type

Hard pretzels dominate packaged retail because their low moisture content supports extended shelf life, efficient transport and broad flavor application. Soft pretzels command higher transaction values in foodservice and are expanding through frozen retail, air-fryer preparation and franchised outlets. Filled and topped soft formats are increasing average tickets through customization.

**Value share by product Type, 2025**




*Source: XXX*

**Value by product Type, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Hard Pretzels | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Soft Pretzels | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Form

Twists retain the broadest recognition and are the primary vehicle for traditional salted and premium seasoned products. Sticks provide efficient packing and portion control, while minis serve lunchbox and multipack occasions. Nuggets and bites are gaining through filled centers, heavy seasoning coverage and foodservice portability; thins and crisps compete more directly with crackers and dips.

**Value by form, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Twists | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Sticks | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Minis | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Nuggets and Bites | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Thins and Crisps | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Flavor

Traditional salted pretzels remain the household staple and price benchmark. Seasoned savory products are taking value share through buffalo, mustard, cheese, garlic, barbecue and sweet-heat profiles that support premium pricing. Sweet or coated products broaden dessert occasions, while filled formats combine indulgence, portability and textural contrast.

**Value by flavor, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Traditional Salted | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Seasoned Savory | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Sweet and Coated | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Filled | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Packaging

Flexible bags dominate packaged pretzels through low material weight, resealability and strong shelf communication. Boxes and cartons remain relevant for portion packs and value formats, while tubs and cups support sharing and impulse consumption. Foodservice bulk packaging grows with soft-pretzel chains, entertainment venues and institutional accounts.

**Value by packaging, USD bn**

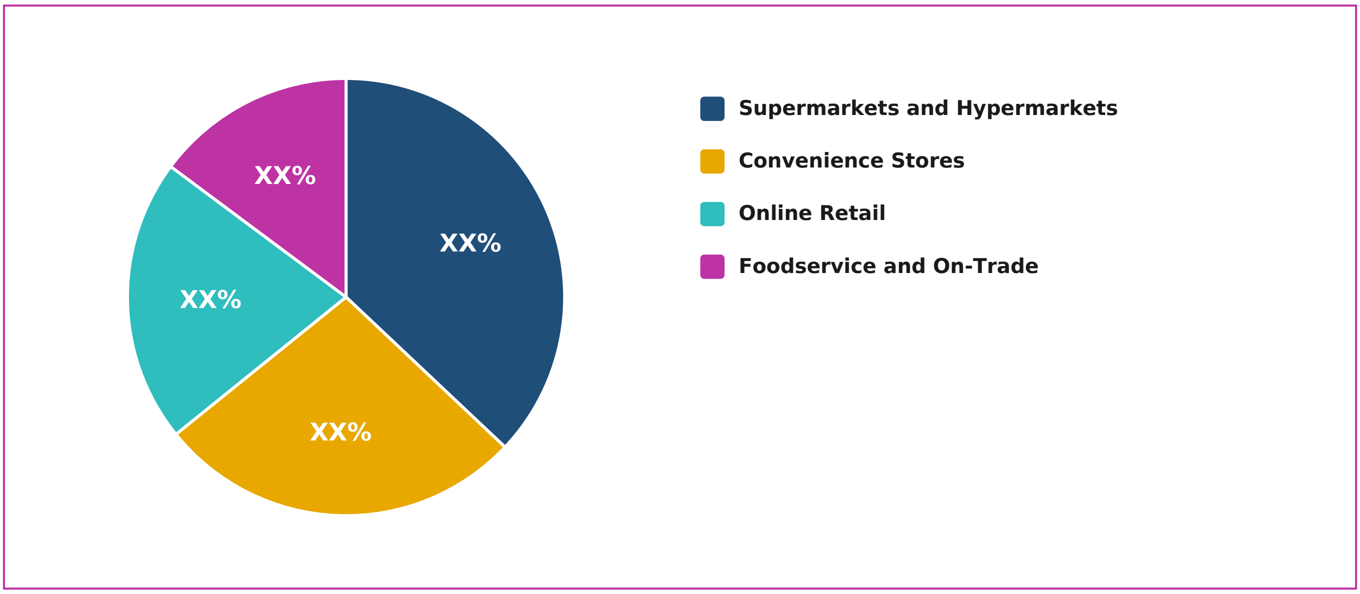
| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Flexible Bags and Pouches | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Boxes and Cartons | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Tubs and Cups | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Foodservice Bulk Packaging | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Distribution Channel

Supermarkets remain the primary discovery and replenishment channel for packaged pretzels, supported by large salty-snack assortments and promotional displays. Convenience stores over-index in single-serve products, and foodservice captures the higher-value soft-pretzel occasion. Online retail is expanding fastest by aggregating specialist brands, facilitating subscriptions and supporting variety packs.

**Value share by distribution Channel, 2025**




*Source: XXX*

**Value by distribution Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Supermarkets and Hypermarkets | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Convenience Stores | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Online Retail | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Foodservice and On-Trade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

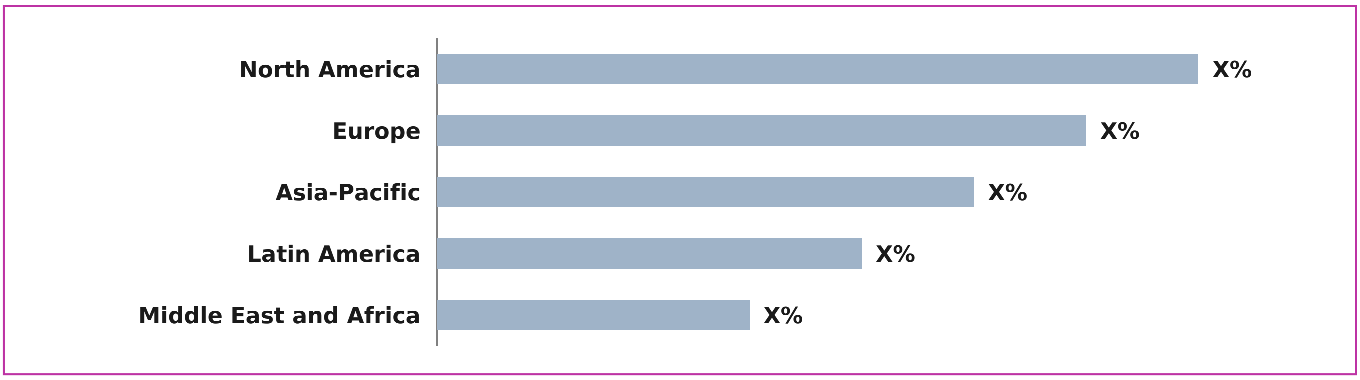
# Pretzels Market Regional Analysis and Country Outlook

North America generated USD XXX billion in 2025, equal to XX% of global revenue. The United States anchors the region through high household penetration of hard pretzels, strong convenience-store availability and mature direct-store-delivery systems. Premium seasoned brands are shifting category value upward, while soft-pretzel chains and frozen retail products serve mall, stadium, travel and at-home occasions.

Europe accounted for XX% of market value, with Germany combining deep cultural relevance, bakery consumption and industrial production. The United Kingdom, France and the Benelux markets are developing through premium sharing bags, private label and imported American-style seasoned products, while nutrition policy increases emphasis on portion control, sodium reduction and transparent allergen labeling.

Asia-Pacific will grow at an XX% CAGR through 2031. Japan and South Korea provide premium imported-snack demand, China offers scale through modern retail and digital commerce, and India and Southeast Asia support growth through smaller packs and localized flavors. Latin America and the Middle East also present expansion routes through convenience retail, franchised soft-pretzel outlets and travel foodservice.

**Growth rate by region, 2025-2031**




*Source: XXX*

**Market value by region, USD bn**

| Region | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Asia-Pacific | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Latin America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Middle East and Africa | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

**Market value by leading country, USD bn**

| Country | 2025 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|
| United States | XXX | XXX | XXX | XXX |
| Germany | XXX | XXX | XXX | XXX |
| United Kingdom | XXX | XXX | XXX | XXX |
| Belgium | XXX | XXX | XXX | XXX |
| Netherlands | XXX | XXX | XXX | XXX |
| Japan | XXX | XXX | XXX | XXX |
| China | XXX | XXX | XXX | XXX |
| Mexico | XXX | XXX | XXX | XXX |

*Source: XXX*

# Pretzels Market Competitive Landscape and Company Share

The global pretzels market has moderate concentration: multinational snack groups lead branded packaged retail, but regional bakeries, private-label suppliers and soft-pretzel franchise systems retain substantial local share. Campbell's Snyder's of Hanover, Hershey's Dot's, PepsiCo's Rold Gold and Utz command broad U.S. distribution, while Intersnack and Lorenz are prominent across European salty snacks.

Competition is shifting from plain salted twists toward strongly seasoned products, pretzel pieces, thins, snack mixes and sweet-salty combinations. Dot's reached a XX% measured U.S. category share in 2025, demonstrating the ability of premium flavor systems and national distribution to reallocate share quickly. Manufacturers are using limited editions, sports partnerships, digital campaigns and mixed-format packs to create incremental consumption.

Capacity, route-to-market efficiency and portfolio focus shape the next competitive phase. Large groups are automating plants and simplifying supply chains, while specialist brands differentiate through gluten-free certification, organic ingredients and artisanal positioning. Soft-pretzel operators are pursuing store productivity, non-mall locations, delivery and international franchising rather than relying solely on unit expansion.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| The Campbell's Company | XXX | XXX | XXX | XXX |
| The Hershey Company | XXX | XXX | XXX | XXX |
| PepsiCo, Inc. | XXX | XXX | XXX | XXX |
| Utz Brands, Inc. | XXX | XXX | XXX | XXX |
| J&J Snack Foods Corp. | XXX | XXX | XXX | XXX |
| Intersnack Group GmbH & Co. KG | XXX | XXX | XXX | XXX |
| The Lorenz Bahlsen Snack-World GmbH & Co KG | XXX | XXX | XXX | XXX |
| Old Dutch Foods, Inc. | XXX | XXX | XXX | XXX |
| Harvest Road Group | XXX | XXX | XXX | XXX |
| MTY Food Group Inc. | XXX | XXX | XXX | XXX |

*Source: XXX*

# Global Pretzels Market Forecast and Commercial Opportunities

Global revenue will increase by USD XXX billion between 2025 and 2031. Seasoned hard pretzels will deliver the largest absolute gain, while soft pretzels, filled bites and pretzel snack mixes will grow faster than the traditional salted core. Pricing will normalize from the inflation-led increases of the early 2020s, placing greater weight on unit growth, mix and distribution.

The upside scenario reaches USD XXX billion by 2031 if Asia-Pacific distribution, foodservice traffic and premium flavor adoption outperform. The downside scenario produces USD XXX billion if sustained food inflation weakens volume and health-focused consumers migrate more rapidly toward protein-rich alternatives.

Commercial winners will protect recognizable pretzel texture while improving nutritional credentials and accelerating flavor rotation. Scaled producers will win on distribution and price-pack architecture; challengers will win where their gluten-free, high-protein, artisanal or culturally specific proposition is difficult for mainstream brands to reproduce.

## Opportunities

- Gluten-free pretzels using sorghum, cassava, chickpea and alternative-grain formulations
- High-protein and high-fiber pretzel platforms
- Localized spicy, sweet-heat and fermented flavor profiles
- Frozen soft pretzels for air-fryer and at-home preparation
- Single-serve products for airlines, schools, offices and hospitality
- Expansion of pretzel kiosks and franchised stores in Asian and Middle Eastern cities

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.