



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

Disclaimer

This report was prepared by shev.io solely for information purposes. shev.io does not guarantee the accuracy and completeness of all information contained in the report, as the data in some sources may have been distorted inadvertently or deliberately. The information presented in this report must not be construed, directly or indirectly, as containing recommendations for further business action. All opinions and estimates contained in this report reflect the authors' judgement as at the date of publication and may be changed without notice.

shev.io accepts no liability for any loss or damage arising from any third party's use of the information contained in this report, including published opinions or conclusions, or for consequences caused by the incompleteness of the information presented. The information presented in this report is obtained from open sources. Additional information may be provided on request.

This document, or any part of it, may not be distributed without the written permission of shev.io, nor reproduced by any means.

Terms of use

This report is provided to the user under a **non-exclusive, non-transferable, limited licence** solely for internal use within the purposes for which the report was lawfully acquired.

The user **may not**, in whole or in part, transfer, sell, gift, publish or otherwise distribute the report to third parties, nor pass it to any other legal entities, partner organisations or external teams (including affiliated companies). It is prohibited to place the report (or fragments of it) in the public domain (websites, social networks, messengers, file-sharing services, open-link cloud storage) or to provide access through third-party services where this allows third parties to review the materials.

If the report is purchased by a **company**, its use is permitted **only by that company's employees** for internal tasks. Passing the report to contractors, consultants, freelancers, agencies and any external parties is prohibited.

All exclusive rights to the report — including its structure, texts, data selection, visualisations, tables, charts and design elements — belong to the rights holder (shev.io) or are used on lawful grounds. The user receives the right to use the report only within these terms.

Without shev.io's written consent it is prohibited to create derivative products based on the report, to use it as part of a commercially distributed product or service, or to remove or alter copyright notices.

The use of **short quotations** and fragments is permitted **only in internal documentation** (internal memos, reports, presentations, working correspondence), provided the meaning and context are preserved and the source is credited: *shev.io*. Any publication or use of the materials in places accessible to third parties is permitted only with shev.io's prior written consent.

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.

Table of contents

1 Introduction

- 1.1 Study Scope and Objectives
- 1.2 Pretzels Market Definition
- 1.3 Inclusions, Exclusions and Currency Basis

2 Research Methodology

- 2.1 Secondary Research Programme
- 2.2 Primary Interview Programme
- 2.3 Bottom-Up Market Sizing
- 2.4 Forecast Model and Scenario Analysis
- 2.5 Data Validation and Quality Control

3 Executive Summary

- 3.1 Global Pretzels Market Snapshot
- 3.2 Key Findings and Decision Takeaways
- 3.3 Forecast Scenarios

4 Global Pretzels Market Trends and Dynamics

- 4.1 Premium Seasoning and Flavor Innovation
- 4.2 Portable and Occasion-Based Snacking
- 4.3 Health, Wellness and Product Reformulation
- 4.4 Market Drivers and Impact Scores
- 4.5 Market Restraints and Impact Scores
- 4.6 Porter's Five Forces Analysis
- 4.7 Regulatory and Labeling Environment

5 Pretzels Market Size and Forecast by Product Type

- 5.1 Hard Pretzels
- 5.2 Soft Pretzels

6 Pretzels Market Size and Forecast by Form

- 6.1 Twists
- 6.2 Sticks
- 6.3 Minis
- 6.4 Nuggets and Bites
- 6.5 Thins and Crisps

7 Pretzels Market Size and Forecast by Flavor

- 7.1 Traditional Salted
- 7.2 Seasoned Savory
- 7.3 Sweet and Coated

7.4 Filled

8 Pretzels Market Size and Forecast by Packaging

8.1 Flexible Bags and Pouches

8.2 Boxes and Cartons

8.3 Tubs and Cups

8.4 Foodservice Bulk Packaging

9 Pretzels Market Size and Forecast by Distribution Channel

9.1 Supermarkets and Hypermarkets

9.2 Convenience Stores

9.3 Online Retail

9.4 Foodservice and On-Trade

10 Pretzels Market Regional Analysis and Country Outlook

10.1 North America

10.1.1 United States

10.1.2 Canada

10.1.3 Mexico

10.2 Europe

10.2.1 Germany

10.2.2 United Kingdom

10.2.3 France

10.2.4 Italy

10.2.5 Spain

10.2.6 Rest of Europe

10.3 Asia-Pacific

10.3.1 China

10.3.2 Japan

10.3.3 India

10.3.4 South Korea

10.3.5 Australia

10.3.6 Thailand

10.3.7 Rest of Asia-Pacific

10.4 Latin America

10.4.1 Brazil

10.4.2 Argentina

10.4.3 Chile

10.4.4 Rest of Latin America

10.5 Middle East and Africa

10.5.1 Saudi Arabia

10.5.2 United Arab Emirates

10.5.3 South Africa

10.5.4 Rest of Middle East and Africa

11 Pretzels Market Competitive Landscape and Company Share

11.1 Market Concentration and Company Shares

11.2 Product and Route-to-Market Benchmarking

11.3 Recent Developments, Partnerships and Transactions

11.4 Company Profiles

11.4.1 The Campbell's Company

11.4.2 The Hershey Company

11.4.3 PepsiCo, Inc.

11.4.4 Utz Brands, Inc.

11.4.5 J&J Snack Foods Corp.

11.4.6 Intersnack Group GmbH & Co. KG

11.4.7 The Lorenz Bahlsen Snack-World GmbH & Co KG

11.4.8 Old Dutch Foods, Inc.

11.4.9 Harvest Road Group

11.4.10 MTY Food Group Inc.

12 Global Pretzels Market Forecast and Opportunities

12.1 Product and Flavor White Spaces

12.2 Country and Channel Priorities

12.3 Strategic Recommendations Through 2031

List of tables

Table 1. Global Pretzels Market Snapshot, 2021-2031
Table 2. Base, Upside and Downside Forecast Scenarios
Table 3. Leading and Fastest-Growing Segments
Table 4. Executive Opportunity Matrix by Market and Channel
Table 5. Pretzels Market Driver Impact Assessment
Table 6. Pretzels Market Restraint Impact Assessment
Table 7. Porter's Five Forces Assessment for the Pretzels Industry
Table 8. Pretzels Market Value and Volume by Product Type, 2021-2031
Table 9. Pretzels Market Value and Share by Form, 2025-2031
Table 10. Pretzels Market Value and Growth by Flavor, 2021-2031
Table 11. Product, Form and Flavor Cross-Segment Opportunity Matrix
Table 12. Pretzels Market Value and Volume by Packaging, 2021-2031
Table 13. Pretzels Market Value by Distribution Channel, 2021-2031
Table 14. Average Revenue per Kilogram by Packaging Format
Table 15. Channel Pack-Size and Price-Ladder Benchmark
Table 16. E-commerce Pretzel Assortment and Growth Benchmark by Region
Table 17. North America Pretzels Market by Country, 2021-2031
Table 18. Europe Pretzels Market by Country, 2021-2031
Table 19. Asia-Pacific Pretzels Market by Country, 2021-2031
Table 20. Latin America Pretzels Market by Country, 2021-2031
Table 21. Middle East and Africa Pretzels Market by Country, 2021-2031
Table 22. Country Attractiveness Ranking: Scale, Growth and Route-to-Market
Table 23. Global Pretzels Market Share by Company, 2025
Table 24. Competitive Benchmark: Brands, Regions, Channels and Capabilities
Table 25. The Campbell's Company Profile
Table 26. The Hershey Company Profile
Table 27. PepsiCo, Inc. Profile
Table 28. Utz Brands, Inc. Profile
Table 29. J&J Snack Foods Corp. Profile
Table 30. Intersnack Group GmbH & Co. KG Profile
Table 31. The Lorenz Bahlsen Snack-World GmbH & Co KG Profile
Table 32. Old Dutch Foods, Inc. Profile
Table 33. Harvest Road Group Profile
Table 34. MTY Food Group Inc. Profile
Table 35. Market-Sizing Variables, Definitions and Source Hierarchy

Table 36. Primary Interview Sample Structure

Table 37. Pretzels Market Forecast by Segment and Region, 2025-2031

Table 38. Strategic Opportunity Ranking by Product and Country

Table 39. Entry Strategy and Capability Requirements by Opportunity

Table 40. Market value by year, USD bn

Table 41. Year-over-year value change

Table 42. Drivers — impact on forecast

Table 43. Restraints — impact on forecast

Table 44. Value by product Type, USD bn

Table 45. Value by form, USD bn

Table 46. Value by flavor, USD bn

Table 47. Value by packaging, USD bn

Table 48. Value by distribution Channel, USD bn

Table 49. Market value by region, USD bn

Table 50. Market value by leading country, USD bn

Table 51. Leading companies

List of figures

- Figure 1. Global Pretzels Market Revenue, 2021-2031
- Figure 2. Pretzels Market Growth Contribution by Region, 2025-2031
- Figure 3. Driver and Restraint Impact on Pretzels Market CAGR
- Figure 4. Pretzel Input-Cost Pressure Index, 2021-2026
- Figure 5. Pretzels Market Share by Product Type, 2025
- Figure 6. Pretzel Flavor Segment CAGR, 2025-2031
- Figure 7. Pretzels Market Share by Packaging, 2025
- Figure 8. Pretzels Market Share by Distribution Channel, 2025
- Figure 9. Distribution Channel Growth Rates, 2025-2031
- Figure 10. Global Pretzels Market Share by Region, 2025
- Figure 11. Regional Pretzels Market CAGR, 2025-2031
- Figure 12. Pretzels Market Revenue by Region, 2021-2031
- Figure 13. Global Pretzels Market Company Share, 2025
- Figure 14. Competitive Positioning by Scale and Premium Mix
- Figure 15. Leading Companies by Regional Pretzel Revenue Exposure
- Figure 16. Primary Interview Distribution by Region and Seniority
- Figure 17. Incremental Pretzels Market Revenue by Opportunity, 2025-2031
- Figure 18. Pretzel Opportunity Attractiveness by Growth and Addressable Value
- Figure 19. Value share by product Type, 2025
- Figure 20. Value share by distribution Channel, 2025
- Figure 21. Growth rate by region, 2025-2031

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

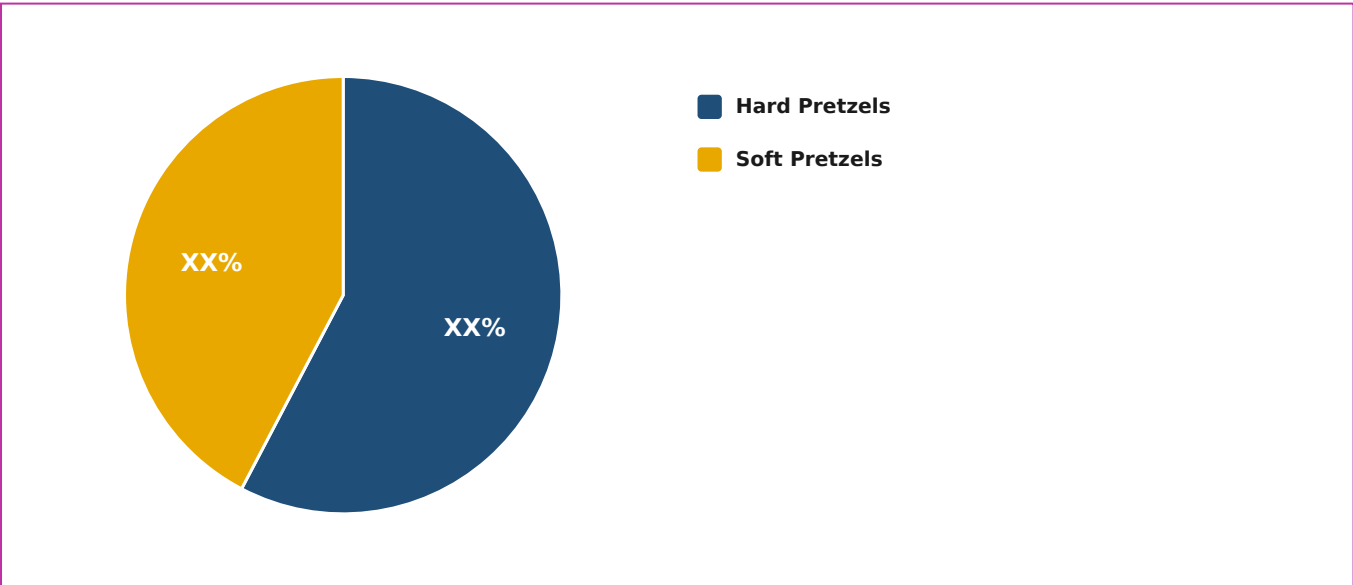
Source: XXX

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

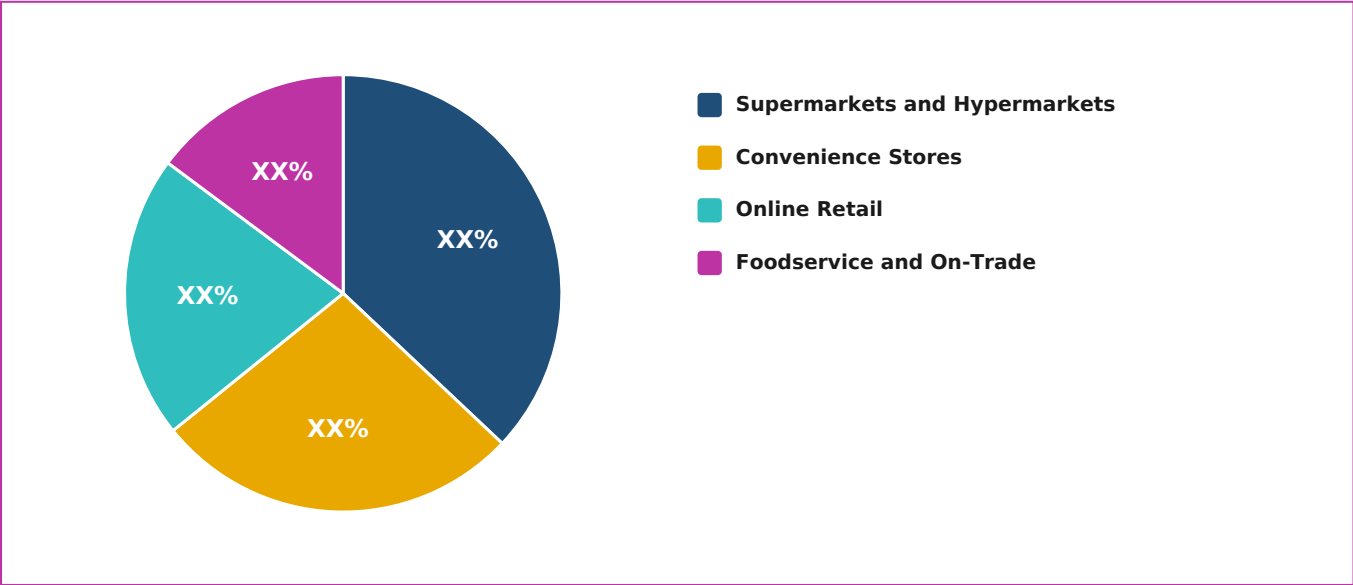
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Flexible Bags and Pouches	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Boxes and Cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tubs and Cups	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice Bulk Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

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

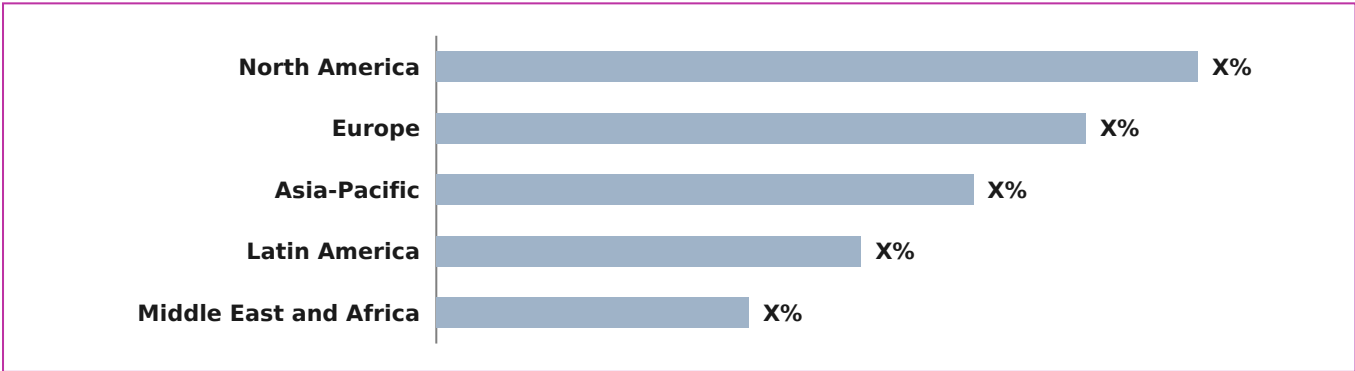
Pretzels Market Regional Analysis and Country Outlook

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.