What's on the shelf?

Our 2026 snapshot of "What's on the shelf?" explores Cargill's four pillars of growth that address today's most important market opportunities, consumer needs & manufacturing requirements, in Cereals (= breakfast cereals & snack bars).

New product development in Cereals continues to outpace forecasted volume growth. Sports bars are the predominant driver behind this growth (+35% CAGR 2021-25*).

Cereals NPD is strongly linked to broader market trends, incorporating changing consumer expectations around health, sensory, transparency and efficiency into everyday formats. While not typically a trendsetting category, the opportunities still provide room for incremental innovation. This ensures that these products remain relevant to consumers who are faced with ever-increasing choice of snacks and breakfast options.

	Breakfast cereals	Snack bars
Volume (kT, 2025)	1,834	206
CAGR 2025-30	0.5%	2.1%
New product development (#, 2025)	2,832	3,295
CAGR 2021-25	2.4%	12.5%
Source: Euromonitor, Innova Market Insights, Europe		

Super sensorial

Cereals are well suited to appeal to broader audiences and broader occasions. Gone are the days when a protein bar was only sought after by gym fanatics. Snack bars and granolas are evolving into everyday treats and need to look and taste the part. This hybridization between breakfast, snacking and desserts is driving innovation in terms of flavor, texture, and visual appeal.

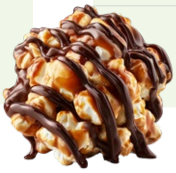
Texture innovation is dialling up the creativity levels, with **"texturemaxxing,"** among today's buzzwords and popular candy bar and dessert-inspired innovation in vogue. We're seeing an ever-widening array of extruded and coated cereals, and texture layering in bars. Here, various textures such as a soft, core center with a crispy coating and crunchy pieces, are combined in a single product. Texture claims are now ubiquitous in bars NPD, having evidenced a +46% CAGR from 2021*. By focusing on textures that delight and surprise ("pops," "snaps," "crunchy"), brands can build stronger emotional connections and create standout moments that meet consumer needs such as indulgence, comfort, and relaxation.

Cargill | Nourishing the world

Flavor inspiration goes beyond traditional staples (chocolate, nuts & fruits) to include bakery & candy flavors but also spices and dairy. Especially the sweet dessert influence proves strong (cookie dough, brownie, speculoos, cookies & cream, etc.), while bolder flavors are also making an entrance (e.g., spices such as cinnamon). This is reflected in the importance of flavor (49%) when buying cereal bars, ahead of price (47%) and health (31%).**

Texture claims*	Breakfast cereals	Snack bars
Incidence %, 2025	47%	93%
Top 3 texture claims (2025)	*Crunchy*	*Crunchy*
	Crispy	*Tender/ soft*
	Chunky	*Crispy*

Flavor subcategory growth (CAGR 2021-25)*	Breakfast cereals	Snack bars
Brown flavors	10%	23%
Cake, cookie & pie	26%	19%
Dessert	17%	27%



By mixing **flavors** such as fruits & nuts with popular chocolate, caramel and peanut (butter) flavors, or including flavors that also signal **textures** (toffee, fudge), and playing with **shapes** (bars, bites, balls, pillows...) these products transform into multi-sensory rituals, positioned for both health and indulgence.

Health

A few compounding trends are leading to cereals becoming more permissible, as consumers recalibrate their expectations for "health conscious" comfort. 49% of European consumers prefer to buy cereal bars with added health benefits.**

Category launches	Breakfast cereals		Snack bars	
	Incidence, 2025	CAGR 2021-25	Incidence, 2025	CAGR 2021-25
No added sugar	12%	3%	25%	19%
Vitamin/ mineral fortified	11%	**28%**	3%	9%
Wholegrain	37%	8%	6%	5%
Source of/ High protein	16%	16%	**63%**	**25%**
Source of/ High fiber	**56%**	11%	40%	17%

Source: Innova Market Insights, Europe

GLP-1 is certainly impacting on the breakfast & snacking industry. Next to cereal & protein bars, also bites, balls, drinkable cereal, single-portion cups and resealable pouches all aim to meet consumer expectations around premium, portion-controlled, smaller breakfast & snacking portions.

And there are continued optimizations made to improve product composition and **nutrient density.** As 63% of European consumers say they are **actively limiting sugar** in their diet***, lowering sugar, but also fat and calories content, are measures growing in popularity.

Added health benefits are also of interest. 49% of European consumers prefer to buy cereal bars **with added health benefits** such as fiber, protein, probiotics and more.** In 2025, 29% of snack bars, and 25% of breakfast cereals came with an "active health" claim*, indicating potential to adjust the offering better to consumer expectations.

Today, across breakfast cereals & snack bars, focus areas are different:

- **Cereals** are driven by "fiber" and "wholegrain" claims, with strong growth witnessed in vitamin/ mineral fortification claims.
- **Snack bars** are driven by protein and fiber claims, with strong growth witnessed in no added sugar claims.

There is room to further tailor offerings to distinct consumer profiles and need states, leveraging both hygiene factors such as protein in snack bars, and value add benefits such as immunity, gut health or beauty from within.

Sustainability & transparency

The health of the planet is a major concern for many consumers. It is therefore no surprise that ethical & sustainability claims often find their way onto cereals (63%), and (albeit to a lesser extent) snack bars (35%) packs*.

As chocolate continues to be the #1 flavor*, **sustainable cocoa certifications** such as Rainforest Alliance, have enabled ethical claims adoption to increase. The use of eco-friendly and fairly traded cocoa is increasingly used as the standard by many brands.

While shoppers increasingly scrutinize ingredient lists and demand greater transparency, **"clean quality"** has become a powerful innovation platform. Consumers are seeking recognizable ingredients and fewer of them, minimal processing, and clear, honest labeling they can trust****. In cereals, this drives innovation around whole grains, shorter ingredient lists, and the use of natural sweeteners and colors.

Beyond formulation, clean extends to sourcing credentials and clearer on-pack communication, witnessed through growth in claims such as **plant-based** and **gluten-free**.

19% of European consumers state that: "Made with real ingredients/natural" claims most influence my purchasing decision when buying cereal bars.**

Category launches	Breakfast cereals		Snack bars	
	Incidence, 2025	CAGR 2021-25	Incidence, 2025	CAGR 2021-25
Gluten-free	16%	6%	28%	7%
Vegan	27%	8%	23%	5%
Plant-based	5%	23%	9%	20%
Ethical - environment	24%	**32%**	13%	21%
Ethical - human	10%	18%	8%	**29%**
Regenerative Agriculture	13%	**32%**	7%	23%

Source: Innova Market Insights, Europe

Efficiency

Continuing pressure from food inflation has made many consumers more value conscious. Just over half of Europeans describe "I only buy what I need" as the best summary of their shopping habits. 70% of consumers state that they always check prices, even on small items.***

While most consumers are stable in their consumption of cereal bars, ~10% state they have reduced their consumption. For 24% of these consumers, **price** was the main reason to decrease their consumption**. In breakfast cereals, top brands have been losing share to private label. So, it's clear that cereal products will need to think beyond a promotional game and deliver on multiple consumer needs to justify their place in the shopping basket of consumers with stretched household budgets.

Key commodities have seen significant challenges recently in pricing. **Cocoa**, in particular, became so expensive in 2024-2025 that suppliers started looking for chocolate alternatives and/or explored different kinds of flavors, such as desserts-inspired flavors.

NPD with compounds further increased from 30% to 36% in sports bars*.

Recent falls in cocoa prices have brought prices down to levels last seen in early 2024, but the ongoing threat of future volatility will encourage more innovators to explore alternative flavor choices or combine cocoa with other tastes to reduce chocolate commitments.

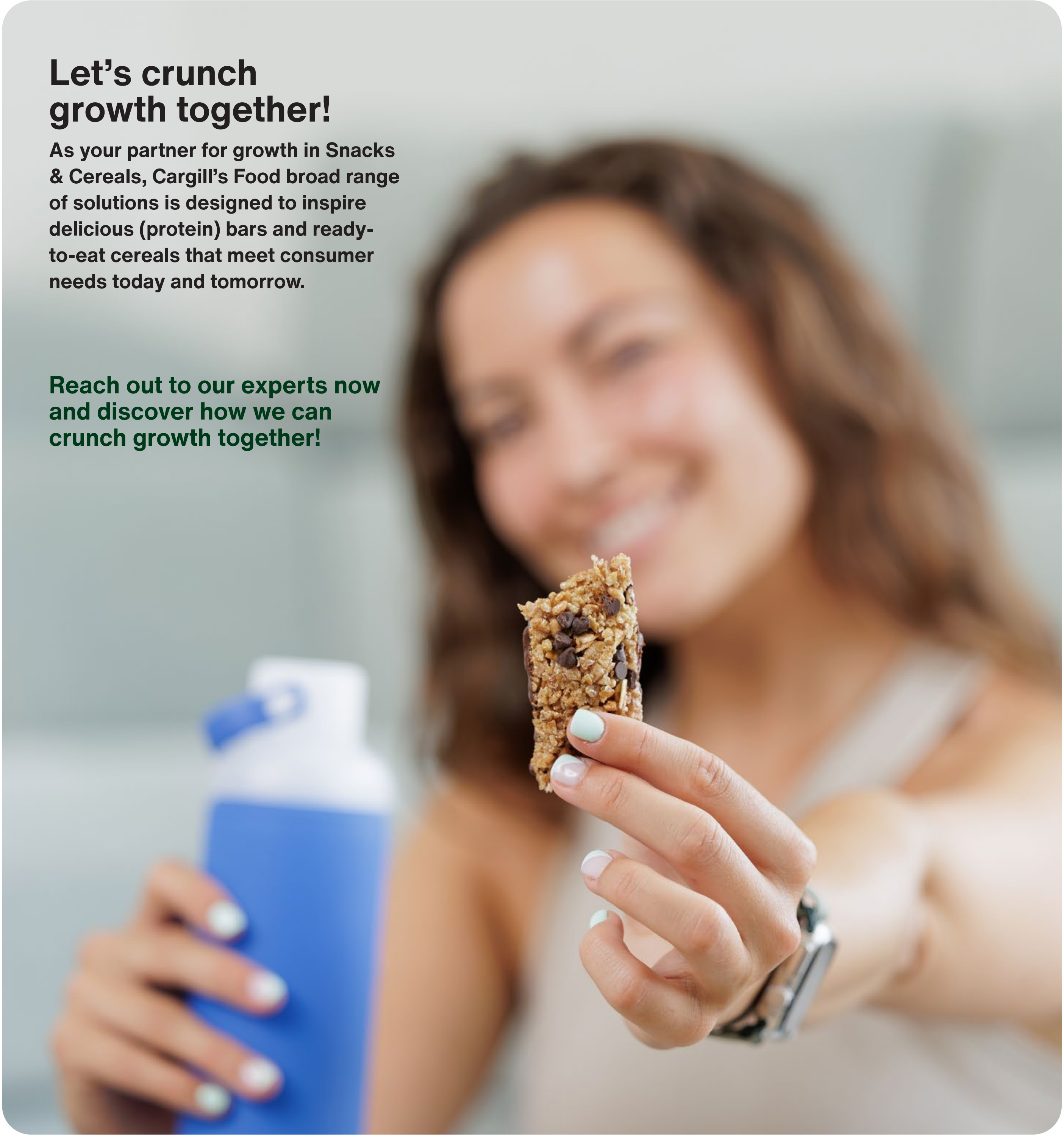
	Breakfast cereals		Snack bars	
	Value share (% 2025)	Growth (%pts)	Value share (% 2025)	Growth (%pts)
Top 10 brands	52.4%	-3.5%	41.5%	1.5%
Private label	23.9%	**2.0%**	13.3%	-1.5%

Source: Euromonitor Europe

Let's crunch growth together!

As your partner for growth in Snacks & Cereals, Cargill's Food broad range of solutions is designed to inspire delicious (protein) bars and ready-to-eat cereals that meet consumer needs today and tomorrow.

Reach out to our experts now and discover how we can crunch growth together!



*Innova Market Insights, Europe, 2021-25

**Innova Market Insights, Snacking behavior in Europe, 2026

***Innova Market Insights, Trends survey, 2026

***The Food People, Jams, Cereals & Spreads 2026

Nourishing the world