

What's *Really* Happening in SNAP Spending?



Every month, millions of Americans rely on the Supplemental Nutrition Assistance Program (SNAP) to help pay for groceries.

In 2026, a growing number of states began restricting what those benefits can be used to purchase, removing the ability to buy items like soda and candy with an Electronic Benefit Transfer (EBT) card.

While the headlines focus on health goals and federal budget impacts, the real story shows up in **everyday purchase decisions** — aisle traffic, retailer choice, and what actually makes it to the checkout line.

To understand how these changes are playing out, we zeroed in on states where SNAP restrictions went into effect on January 1, 2026 — Iowa, Indiana, Nebraska, Utah, and West Virginia — then looked closer at households using EBT as a payment method. The results show **how policy shifts ripple through everyday shopping behavior.**

#1. Soda and candy aisles are still busy. The checkout lines look different.

When states removed soda and candy from SNAP-eligible purchases, many expected category-wide declines. In reality, the impact depends on whose cart you're watching.



CARBONATED SOFT DRINKS | YOY % UNIT CHANGE

	IOWA	INDIANA	NEBRASKA	UTAH	WEST VIRGINIA
ALL CONSUMERS	+16% ▲	+17% ▲	+17% ▲	+20% ▲	+14% ▲
SNAP RECIPIENTS	-11% ▼	-10% ▼	-21% ▼	-14% ▼	-11% ▼

CANDY | YOY % UNIT CHANGE

	IOWA	INDIANA	NEBRASKA	UTAH	WEST VIRGINIA
ALL CONSUMERS	+13% ▲	+8% ▲	+11% ▲	+17% ▲	+5% ▲
SNAP RECIPIENTS	-18% ▼	-20% ▼	-11% ▼	+4% ▲	-13% ▼



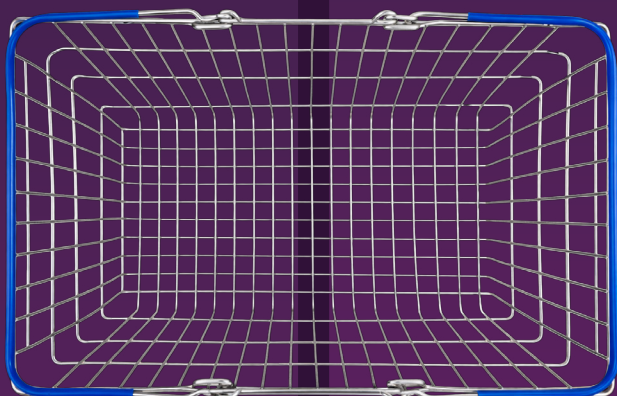
📈 Growth continues – just not in all carts.

Restrictions are reshaping buying behavior among SNAP households, driving **double-digit declines** in most states. Meanwhile, the broader market is still grabbing 2-liters and king-size bars like nothing's happened, keeping year-over-year category growth intact.

#2. Statewide spend is up, but SNAP carts are getting smaller

When new restrictions rolled out, some expected overall spending to soften statewide. Instead, spend and unit volume keep ticking up, even as SNAP households scale back.

SNAP RECIPIENTS



DOLLARS

+7%

UNITS

+2%

UNITS

-5%

DOLLARS

-9%



ALL CONSUMERS

YOY % CHANGE, COMBINED IA, IN, NE, UT, WV SPEND

SNAP wallets are shrinking.

Total dollars spent and units purchased are climbing year over year. But consumers who use SNAP benefits are **buying less** — smaller baskets, more swaps, and harder decisions before checking out.

#3. SNAP consumers are changing where they shop

For years, dollar and grocery stores have been the steady center of budget shopping. But among households using EBT cards, that center is shifting.



YOY % SPEND CHANGE, SNAP RECIPIENTS IN IA, IN, NE, UT, WV

② SNAP household purchasing is switching lanes.

Within this cohort, year-over-year spend is rising in club, convenience, and mass, while grocery and dollar see slight declines. The pattern suggests a possible **rebalancing of trip types** — more bulk-buying in some moments and immediate-fill purchases in others.

About Fetch Finds

Fetch Finds is a consumer insights series from Fetch, powered by billions of verified receipts — real transactions, not projections. This report analyzes spend across all payment methods in five states where SNAP restrictions have gone into effect, comparing overall trends to households using an EBT card as a payment method.

Using a 13-month static panel, we examine shopping behavior from January 1 through February 6 in both 2025 and 2026 to measure year-over-year change.