



TOP CHOCOLATE

TRENDS

*2023 & beyond*



# NORTH AMERICA EDITION

# Top Chocolate Trends 2023 & Beyond

Consumers' attitudes to life are not static but constantly evolving. And some events, like Covid-19, can accelerate a faster change. This impacts the way people indulge in chocolate and other treats. Depending on their mood or mindset, consumers have a specific attitude towards life which will determine the type of indulgence they choose. You can learn more about these insights in our [Future of Indulgence](#) opinion piece, that was informed by multiple sources, including proprietary research.

While there will always be a need for **Intense Indulgence** chocolate experiences, we expect consumers to increasingly have a soft health approach to life, increasing the **Mindful Indulgence** chocolate space. Meanwhile, while **Healthy Indulgence** is still in its infancy in chocolate, we know from our consumer research that people are interested in it. So this is definitely a trend to watch within the confectionery segment in the years to come.

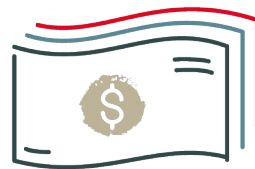




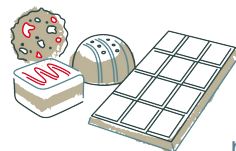
# Top Chocolate Trends 2023 & Beyond

Chocolate confectionery is an important and dynamic market, expected to be worth over **€107 billion / \$128 billion** in global retail sales by the end of 2023, with volume growth of **1.9% CAGR** over the next 3 years to 2025.<sup>1</sup> And **North America** is the second largest market in the world after Western Europe, expected to grow at **2.1% CAGR**.

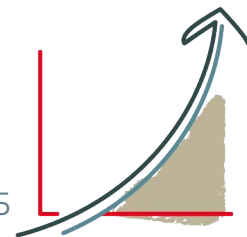
Innovation has a key role to play in that growth projection, as these consumer attitudes demand a new approach. Read on to understand how the 3 types of indulgences driven by changing consumer attitudes affect the indulgence landscape in the chocolate confectionery market.



**€107 / \$128**  
billion billion  
global retail sales by end of 2023



**↑ 1.9%**  
CAGR  
next 3 years to 2025



**NORTH AMERICA**  
**2nd**  
largest market  
in the world



**INNOVATION**

*consumer attitudes demand a new approach*

<sup>1</sup>. Euromonitor, 2022



# INTENSE *indulgence*

Consumers look for Intense indulgence when they want to enjoy life to the fullest. They want over-the-top and immersive experiences.

“Chocolate that is a **real feast** for the eyes and for the taste buds.”

# Intense Indulgence in North America

Flavor exploration continues to be a big trend in North America, sparked by a strong tradition for holiday celebrations both big and small. The next big wave of innovation uses new ingredients in combination with chocolate to create truly multi-dimensional textures. Underlying these trends is a desire for more premium experiences, enriched by story-telling about the chocolate itself.

## Moments of indulgence

54%

of North American consumers like to enjoy moments of indulgence where they pay little-to-no attention to nutritional intake.

## Seeking premium upgrades

59%

of North American consumers actively seek out premium versions of their favorite chocolate, up +10% vs. two years ago.

## Adventurous chocolate

1 in 2

North American consumers agree that chocolate must feel fun and adventurous, up +6% vs. two years ago.

## Social sharing

40%

of North American consumer like to share new and exciting chocolate experiences on social media.

# Celebrating with flavor and seasonal editions

Consumers want new chocolate experiences, so chocolate makers are turning to **more moments in the calendar** to celebrate. Flavor continues to draw in chocolate lovers, especially when the innovation comes from the chocolate itself. There is also demand for more premium and exclusive limited editions, offering upgrades to the core product.

76%

of US consumers agree:  
When I want to celebrate, I  
choose something with  
chocolate in it

40%

of North American  
consumers say replacing  
regular chocolate with  
caramelized white chocolate  
will make it more premium.

**“Help consumers celebrate in the way they want to. Consumers look for regular opportunities to celebrate, party and mark achievements and milestones.” - Foresight Factory**

INTENSE  
*indulgence*



**VOSGES Pumpkin Spice Truffles**  
Introduced in response to customer requests: seasoned with Zanzibar black pepper, Grenadian gold nutmeg, Fijian ginger, Mexican vanilla, and Royal Cinnamon.



**SOUTHERN GROVE - Summer Limited Edition Trail Mix**  
Nuts, dried fruit, dark and white chocolate, plus ice cream cone shaped strawberry pieces



**KROGER - Blonde Tablet**  
Swiss chocolate crafted from premium cocoa butter and caramelized sugar.



# Multi-sensorial for intense experiences

Taking texture to new levels is a fast-moving trend in for premium innovation in chocolate confectionery. Chocolate's unique and irresistible melt-in-the-mouth trait is being combined with gooey, crispy, smooth, and crunchy ingredients. Importantly chocolate makers are using this opportunity to deliver truly fresh **never-experienced-before sensorial delights** for their brands.

## 6 in 10



Chocolate Confectionery launches in North America carry a texture claim, up from 4 in 10.

## 58%

of North American consumers prefer chocolate that has multiple textures.

***"Texture plays a critical role in determining our perception of quality."***

Professor Charles Spence, Gastro Physics

INTENSE  
*indulgence*



**KIT KAT - Salted Caramel**  
Goosey caramel combined with their classic wafer & chocolate



**REESE'S - Big Cup with Reese's Puffs**  
Extra large peanut butter cup filled with Reese's Puffs cereal bites



**HAWAIIAN HOST - Flavors of Aloha range**  
Each bar is inspired by Hawai'i with exotic ingredients and visual texture.

# Origin & craft storytelling that deepens consumer connection

Chocolate craft continues to develop, as makers explore new **ways to educate chocolate lovers** in the special processes to cultivate and process cocoa and other key ingredients for our favorite treat. When these stories are put at the heart of innovation, consumers are willing to pay more for that guarantee of authenticity and quality.

52% 1 in 2

of North American consumers agree that chocolate that has a unique story about where it came from, how it was made, etc. is more premium.

North American consumers prefer Belgian chocolate rather than regular chocolate.

**“Provenance adds to the value proposition for location-associated foods [such as chocolate]. Transference of sense of locale adds to the allure.” - Innova**

INTENSE  
*indulgence*



**LOTUS BISCOFF - Chocolate**  
Introducing premium cookies into chocolate with a Belgian quality claim



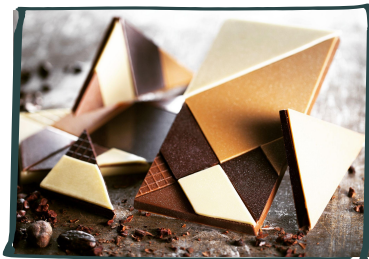
**NIAGARA CHOCOLATES - Handcrafted Clusters**  
From 'America's local chocolate company' in Buffalo, New York.



**BEYOND GOOD - Small Batch Local Bars**  
Madagascan chocolate combined with other locally-sourced ingredients: vanilla, plantain & sea salt.

# Intense Indulgence Solutions

INTENSE  
*indulgence*



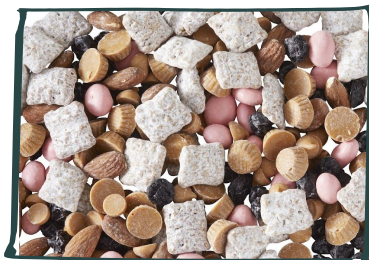
Accent - Chocolates  
for Confectioners



Caramel AURA -  
Caramelized White  
Chocolate



Ruby



Colored, Flavored &  
Textured Inclusions  
**NEW** flavors



Confection Fillings &  
Decorations



Belgian & Swiss



# MINDFUL *indulgence*

Consumers want to indulge without compromising their (physical and mental) well-being, the health of others or the planet.

“Chocolate that is not only tasty, but also **good** for me and good for the planet.”



# Mindful Indulgence in North America

The most established mindful indulgence trend in North America confectionery is the reduction of sugar in chocolate, a segment which continues to grow in double digits each year. Next on the horizon is the rise of plant-based, vegan and dairy free options, particularly extending beyond dark chocolate to both milk and white. Finally, chocolate in this space that is good for the world around us creates the strongest triple play to win with consumers: being tasty, good for me AND good for the planet.

## Balance

73%

of US consumers agree that there is a place for chocolate in a healthy diet.

## Triple play

67%

of North American consumers agree that chocolate needs to be tasty, good for me and good for the planet.

## Healthier to be happier

38%

of US consumers say they have adopted a healthier lifestyle to try to improve their overall happiness.

## Nutritional snacks

2 in 3

of North American consumers say that they expect snacks to offer a nutritional boost.



# Sugar reduction continues in both line extensions and core

More consumers in North America are actively looking for **ways to manage their sugar intake**. This has also been driven by the trends in lifestyle choices like Keto and Paleo diets. Chocolate makers are responding to consumer demand by creating sugar free versions of their core lines, as well as renovating their products over time to help reduce the amount of sugar per portion.

# 48%

of North American consumers say they need chocolate to be low in sugar, up a staggering 17% vs. two years ago

# x2

Sugar Free chocolate in the U.S has doubled in the last 5 years, now worth over \$260 million in retail sales

"Indulgence offerings are being reformulated to, for example, reduce sugar content. The goal is to make offerings compatible with consumers' health goals without compromising on all-important taste, texture and scent – the hallmarks of indulgent food." - Foresight Factory

MINDFUL  
indulgence



**POKET LATTE - Choco Nuts**  
Chocolate coated almonds with 64% less sugar using oat milk chocolate



**HERSHEY'S - Zero Sugar range**  
New branding for their sugar-free lines, calling out 'aspartame free'



**GATSBY - Peanut Butter Cups**  
1/2 the calories and 1/4 the sugar of standard peanut butter cups.



# Innovation in vegan & dairy free to offer choice in plant-based

Plant-based launches have been highly prevalent in adjacent treat segments ice cream and beverages. In confectionery, dark chocolate is well-established as naturally dairy-free, so **milk-like chocolate is the one to watch**. In North America, Hershey launched its oat milk chocolate bar in 2020. Then Purdy's launched its Mylk bars and TCHO moved its entire line to plant-based in 2021. In the last year, Lindt joined their ranks to launch a range of vegan bars.

1 in 3 39%

of North American consumers agree that 'Vegan or plant-based chocolate is something I seek out to purchase', doubling from just 17% two years ago.

of North American consumers agree that Dairy free chocolate is better for me than those with dairy, up from 22% two years ago.

"The move away from meat has led to the development of plant-based proteins, dairy and a range of other categories including chocolate confectionery. Non-dairy milk chocolate launches are where the vegan action is." - Mintel

**MINDFUL**  
*indulgence*



**EVOLVED - Plant-based protein** combined dark chocolate with grass-fed, pasture-raised collagen protein and dry-roasted hazelnuts



**CHUAO CHOCOLATIER - Plant-based bacon tablet** 'Everything you love about bacon chocolate, now in a plant-based version'



**LINDT - Vegan Range** Oat-based chocolate in milk chocolate, hazelnut and salted caramel varieties

# Triple play with sustainability & multiple claims

There is a proliferation and layering of 'good for me' claims in mindful chocolate snacks, focusing on sugar, dairy, protein, non-GMO, natural, palm, and more. Standing out from the crowd, there are chocolate makers that also offer **good for the planet** as a key benefit for consumers. This holistic approach has strong appeal for consumers, so sustainably-sourced is a must-consider for these products.

47% 2 in 3

of North American consumers actively seek out sustainably produced chocolate, up from 27% two years ago

North American consumers agree that chocolate with clean labels is more trustworthy

A more direct channel to communicate and influence consumer purchasing decisions is using product claims to communicate sustainability messages either via packaging or product description - Euromonitor

MINDFUL  
indulgence



**LOVE GOOD FATS - Sugar Free Dark Chocolate Thins**  
Made with fair trade certified cocoa and 0g of sugar



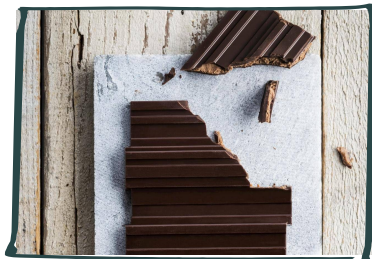
**LAKE CHAMPLAIN - Vegan Salted Caramels**  
Product description



**BLUE STRIPES - Whole Cacao Bars**  
Dark chocolate bars made only with the cacaofruit. Low in sugar, high in antioxidants, non-GMO, upcycled and Fairtrade

# Mindful Indulgence Solutions

MINDFUL  
*indulgence*



No/Low/Reduced Sugar



Plant Based / Vegan / Dairy Free  
**NEW** Dairy Free Compound



Organic & Sustainably  
Sourced



Nut Butters, Fillings,  
Coatings & Inclusions



Cocoa Nibs &  
Cocoa Powder



Cacaofruit Experiences



# HEALTHY *indulgence*

Consumers looking for healthy indulgences actively and intentionally make choices that have a positive impact on their health.

“Chocolate fortified and functional, a food for **health**.”



# Healthy Indulgence in North America

Healthy indulgence products are rich in macro & micro nutrients which actively and positively impact consumers' physical and mental wellbeing. It's about positive nutritional products featuring ingredients with proven benefits like vitamins, minerals, fibers, and flavanols. Even better if the nutrients are naturally occurring from the whole food itself, straight from nature.

Chocolate is a food naturally rich in nutrients, flavanols for instance. While it's still a niche market, 65% of global consumers would love a healthy-boosted chocolate (for example with macro/micronutrients)

## Improve diet

1 in 2

of North American consumers say that they have looked to improve their diets over the last two years.

## Seeking a boost

28%

of North American consumers agree 'I choose products that positively boost my nutrition or benefit how my body functions (e.g. high in protein, superfoods)'.

## Supplement chocolate

55%

of North American consumers agree 'I take supplements to support my health but would rather have a health-boosting chocolate'.

## Heart health

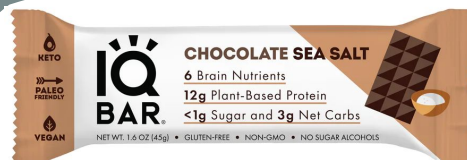
68%

of North American consumers agree they would like a chocolate that supports their heart health, more so than mental health or immunity.

# Healthy Indulgence is emerging in chocolate confectionery

Across North America, chocolates and treats are shifting to have a whole spectrum of **health benefits**. From chocolates made with immunity-boosting vitamins and nutrients, to products with physical and mental health claims, to goodies that benefit gut health, there's a **new generation of healthy chocolates** appearing on the market for consumers to try. The U.S. is a leading market globally for spotting these pioneers.

HEALTHY  
*indulgence*



## IQBARS - Brain Protein Bars

Formulated with clean label ingredients rich in compounds shown to benefit the brain & body.



**SOURCE - Vitamin-infused dark chocolate bites**  
Beauty Bites are infused with biotin for longer, stronger hair and nails



## MELLO - Relaxing chocolate

Infused with botanicals Lemonbalm and L-Theanine to help you unwind.



## LENNY & LARRY'S - Boss Immunity Bars

The bars contain BC30, a probiotic ingredient that supports immune health and protein utilization to benefit gut-health



# TOP CHOCOLATE **TRENDS** *2023 & beyond*

[www.barry-callebaut.com](http://www.barry-callebaut.com)