



BARRY CALLEBAUT

TOP CHOCOLATE

TRENDS

2023 & beyond

EUROPE 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.

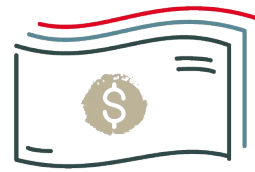
While there will always be a need for **Intense Indulgence** chocolate experiences, we expect consumers to increasingly have a soft health approach to life, increasing the **Mindful Indulgence** chocolate space. Meanwhile, while **Healthy Indulgence** is still in its infancy in chocolate, we know from 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 2025.¹ **EMEA** is the largest chocolate confectionery market in the world, forecast to grow to 4.2 million tonnes in 2023. **Eastern Europe** is driving the fastest growth within the region: forecast to grow 3.1% CAGR over the next 3 years to 2025.

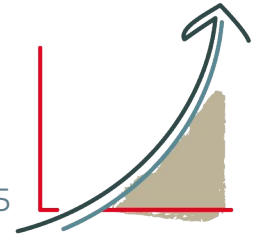
Innovation has a key role to play in that growth projection, as these consumer attitudes demand a new approach. Read on to understand how the 3 types of indulgences driven by changing consumer attitudes affect the indulgence landscape in the chocolate confectionery market.



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



↑ 1.9%
CAGR
next 3 years to 2025



FORECAST

4.2
million tonnes
in 2023



INNOVATION

consumer attitudes demand a new approach

¹ 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 EMEA

Most common reason to eat chocolate is for **pleasure** and there are many ways to deliver pleasure with chocolate! Whilst Multi-sensoriality, Seasonal & Gifting are the most established propositions, we see chocolates with a story rising and exclusive chocolates emerging.

There is also different behavior depending on the generation: Gen Y eats chocolate as a reward for their achievements. For Gen X it serves more as a way to unwind and de-stress.

Multi-sensoriality

63%

European consumers prefer chocolate with multiple textures.

Storytelling

59%

European consumers consider chocolates with a unique story about where it comes from / how it is made more premium.

Exclusive

69%

European consumers are looking for new & exciting chocolate experiences.

Celebration

7/10

European consumers choose something with chocolate in it when they want to celebrate.

Multi-Sensoriality

Some consumers are looking for **comfort**, to relax; alone or with loved ones.

How to deliver comfort? Think rich & creamy chocolates, long lasting multisensorial experiences and well known flavors.

59%

of European consumers think chocolates with multiple textures & flavors are more premium.

8 in 10



European consumers say eating chocolate make them happy

Comfort is the **#1** driver for consumers, who look for reassurance in those troubled times.

INTENSE indulgence



MAGNUM -Billionaire
Double gold caramel & biscuit pieces

KITKAT- Dark with Southern Australian Orange
Australian Kitkat made with a local ingredient (Southern Australian Orange) for an appealing & tasty experience.

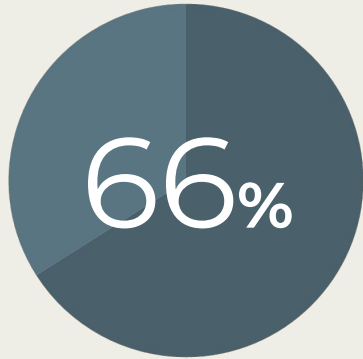


Marta Portales – xoc (Spain)
XOC is the sound it makes. Multi-sensory experience based on the texture of the packaging and its singular visual design and personality

Storytelling

Some consumers are looking to **escape the ordinary**, take a break from the routine and allow their mind to travel while satisfying their taste buds.

Brands can deliver on this through single origin chocolates, unique recipes associated to a specific location or unique craftsmanship.



of European consumers think upscale chocolates should come with a story about where it comes from and how it was made.

INTENSE
indulgence



Poulain
Made in France milk chocolate celebrating 3 regions of France (see stamps) through the selection of inclusions.



HARRODS - Single Estate chocolate bars
Bars made with cocoa beans coming from individual farmers across a range of volcanic islands.



GODIVA
Pralines taking you on a journey across 5 cities.

Exclusive

Some consumers are looking for **unique, rare & exclusive** chocolates because too much of the same chocolate makes it dull after some time or because they want to show off a little and share their expertise with friends!

39% of the Western European Consumers want Exclusive or limited edition chocolates

75% of the Western European Consumers are looking for new & exciting chocolates.

INTENSE
indulgence



NEUHAUS - Duet
Select a base, a ganache and create your own pairing for a unique praline!



ORIGINAL BEANS - Cusco 100%
Chocolate made with beans from the sacred cusco valley in Peru. Ultra rare!

To'aK - Product name
Each bar is presented in a handcrafted wood box that has the individual bar number engraved. It comes with a 60 page booklet about the provenance of the chocolate. A connoisseur chocolate!

Celebration & Seasonal

Nowaday every day can be a celebration. Consumers want to celebrate life, whether that's big or small events, by themselves or with others!

Life is a celebration, so is chocolate. Think beyond traditional Christmas & Easter and multiply the occasions with smaller scale events, sports events or even your consumer events like birthday or wedding!

43%

of European consumers love any excuse to have a celebration.

7 in 10

European consumers choose something with chocolate in it when they want to celebrate

INTENSE
indulgence



M&Ms - It's a girl!
A personalised bag of M&Ms which you can create online by selecting the colors and adding text & images to it!



GOOD BOY - Advent Calendar for Dogs
a dog safe choc advent calendar for our beloved 4 legged friends!



Love Cocoa Happy birthday Milk Chocolate
Milk chocolate bar with honeycomb

Intense Indulgence Solutions

INTENSE
indulgence



Ruby Chocolate



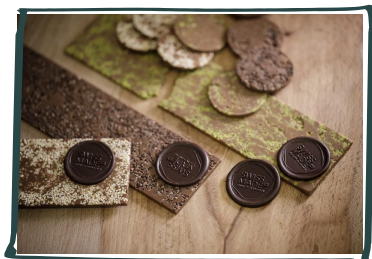
Caramel Chocolate



Indulgent Fillings



La Morella Nuts



Swiss Made



Single Origin



Decoration



D'Orsogna Inclusions

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 EMEA

To indulge mindfully is to choose tasty, healthy and good for the planet chocolates. It is, what we call, the **Triple Play**. You can approach such proposition in different ways. Whilst Sugar reduction is now an established proposition, Plant based is booming and chocolates making most of the cacaofruit are emerging.

Plant-based

6/10

Centennials & Millennials consumers expect brands to offer a plant based alternative.

Sugar Reduction

41%

Consumers are trying to limit their sugar intake.

Sustainability

56%

Consumers actively seek out for Sustainable chocolates.

Triple Play

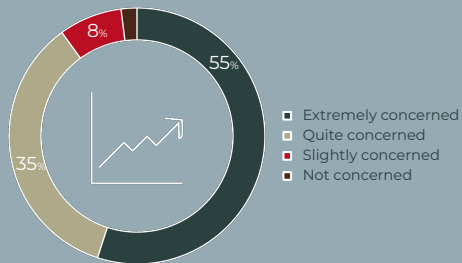
76%

Consumers say chocolates need to be tasty, good for me & good for the planet.

Mindfully affordable

Consumers are getting more and more concerned about the impact of inflation on their household budget and are looking for more affordable products or smart solutions. It's all about spending less or buying better!

The impact of inflation on my household budget, 2022 Q3



58%

European consumers are actively looking for more affordable version of their favorite chocolates

Consumers are switching to private labels. Confectionery Private Labels will represent 30% value market share in 2023.

MINDFUL
indulgence



600g assortment - £5.00



84g bar - £1.00



334g pouch -
£3.00 - 4.00



LOTUS - Range of Tablets

A biscuit and a Chocolate bar in one go.
A smart solution to spend less!

QUALITY STREET - Bar & pouch

The Quality Street experience in a smaller format for a smaller price.



Albert Heijn - Mini's

A bite of indulgence with accessible price tag (1.79€ for 350gr - 5.11€/kg)

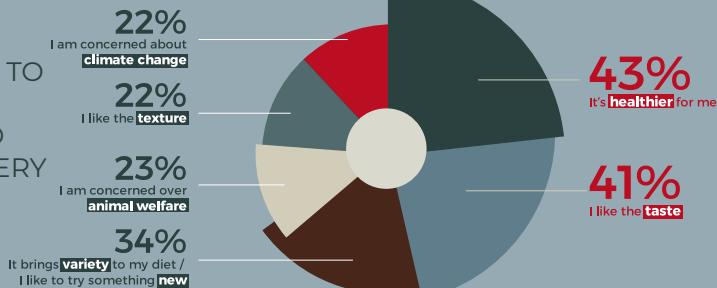
Plant Based boom

Plant based milk chocolate alternatives are booming. Consumer demand is there but not fully satisfied by the current offer so let's celebrate what nature has to offer!



Only 45% of global consumers are satisfied with the current offering of **plant-based** milk chocolate

KEY MOTIVATIONS TO CONSUME PLANT-BASED CONFECTIONERY



MINDFUL indulgence



HANDS OFF MY CHOCOLATE - Vegan range
A delicious range of chocolate tablets offering taste, variety & appeal...oh and by the way, it's vegan!



LINDT HELLO - Vegan Range
Multisensorial vegan alternatives to milk chocolate.



KIT KAT - Vegan kitkat
A vegan alternative to the iconic version in a packaging celebrating nature.

Sugar Reduction

One of the key concerns for the consumers remains **sugar intake**. The low carb & keto diets have also gained traction and accelerated the Sugar Reduction agenda. The key challenge remains to offer a **tasty, without added sugar and clean label chocolate**...and that's where Barry Callebaut can help you!

MINDFUL indulgence



ELSY
Healthy chocolate balls coated with 1% Without added sugar (& polyols free) milk & dark chocolate



KETO HERO
A range of 3 Keto friendly tablets: dark, milk & white chocolates.

41%
of global consumers are trying to limit their sugar intake

14%
of global consumers are avoiding sugar entirely

Triple Play

Consumers are looking for **Tasty, Healthy & Good for the planet** chocolates. Chocolates crafted with upcycled cacaofruit allow consumers to make a positive impact with every bite.

Fighting climate change is about fighting food waste. And preventing food waste is about **Upcycling**.

Over 30% of all food produced goes to waste, and that's a big problem for the planet. While previously 70% of the cacaofruit was thrown away, now not only its seeds (beans) are used but also its fresh juicy pulp is upcycled to craft delicious chocolates.

60% of consumers are more likely to buy from companies that are working to reduce climate change.

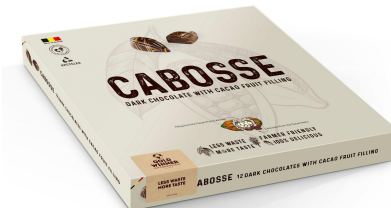
MINDFUL
indulgence



WAITROSE - WholeFruit Chocolate
100% pure cacaofruit



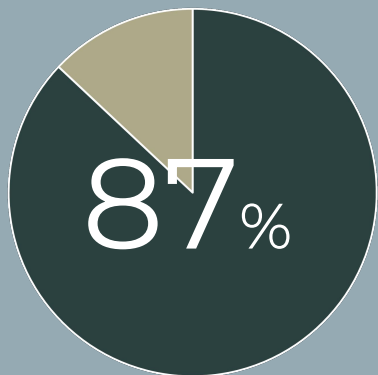
SPRÜNGLI - Grand Cru Batons
Vegan chocolate pralines with a cacaofruit juice filling



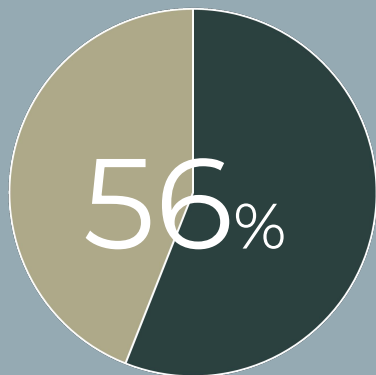
CONFISERIE VANDENBULCKE- Cabosse
Pralines with a fruity filling made with upcycled cacaofruit pulp
Winner of the ISM'22 Innovation Awards

Traceability

While Sustainability has become the norm, **Transparency and Traceability** are more and more important to consumers.

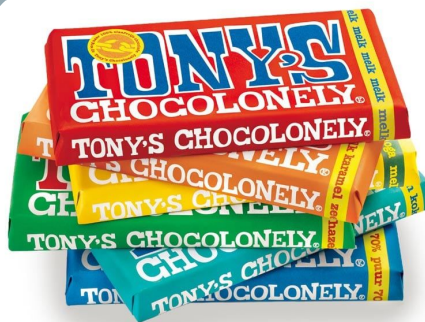


Of European consumers think sustainability claims important are when choosing what chocolate products to buy.



Consumers actively seek out for Sustainable chocolates

MINDFUL
indulgence



Tony's chocolonely
100% slave free chocolates



ZAINI - Women of Cacao

In collaboration with Cocoa Horizons, Zaini promotes the sustainable cultivation of high quality cocoa, ensuring farmers and their families better living conditions and development, both economic and social.



Mindful Indulgence Solutions



Classic recipes



Traceability



Without Added Sugar Chocolate



Nut Inclusions



Cabosse Naturals Cacaofruit Ingredients



Plant Based Chocolate

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 EMEA

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)

Living the Healthier Life

62%

of consumers are committed to leading a healthier lifestyle.

Functional Foods

1 in 3

of consumers seeking out functional/fortified products more frequently.

Snacking is Changing

56%

of consumers have switched their snacking habits for general health and wellness purposes.

Mental Care

2 in 5

of consumers have become more conscious about their mental wellbeing

Healthy Indulgence is emerging in chocolate confectionery

Across Europe, 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.



Japan, Morinaga Immunity Care Plasma Lactic Acid Bacteria Chocolate
Supporting the maintenance of immune function in healthy people



India, Awsun Active Immunity Ayurveda Inspired Functional Chocolate
Supports immune system with a superstar blend of natural herbs and botanicals



Mosh Protein bars for the brain - USA

The bars are currently available in three flavours (Peanut Butter Crunch, Chocolate Crunch and Peanut Butter Chocolate Crunch). They include ingredients the brand claims have been recommended by doctors and nutritionists to support brain health, such as ashwagandha, and Vitamin D3.



Japan, Glico GABA Mental Balance Chocolate
Mental balance chocolate containing GABA, a relaxing ingredient that supports adults who do their best.

TOP CHOCOLATE

TRENDS

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