



CHOCOLATE PLEASURE

Innovative flavour profiles for chocolate confectionery

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CHOCOLATE PLEASURE – Innovative flavour profiles
for chocolate confectionery

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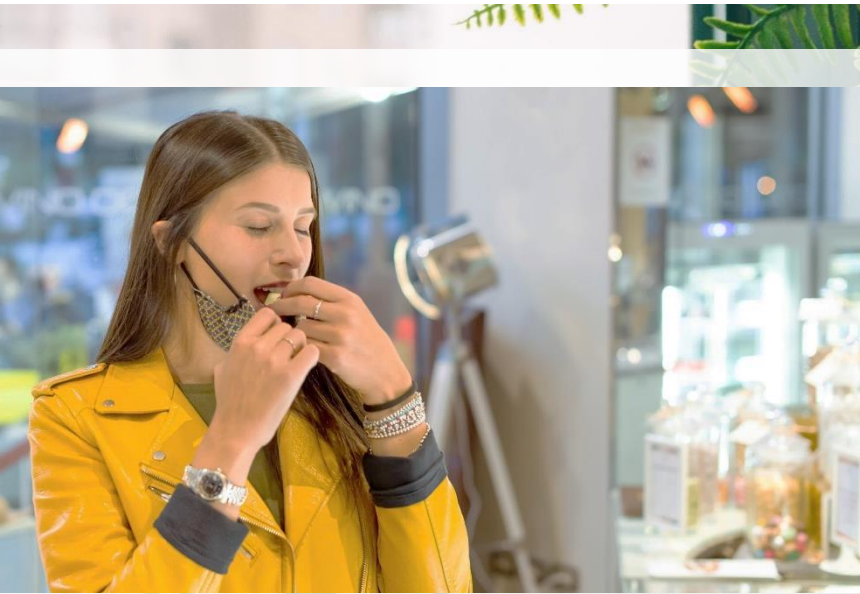
Global perspective: Chocolate confectionery

Launching innovative premium products has gained in importance within the past years. The use of high-quality chocolates as part of the recipe is equally growing.

In addition to the global trend for premiumisation, the chocolate segment further shows a growing demand for gluten-free, vegan and functional product options, as well as organic claims.

Purchasing power is also driven by appealing and sustainable packaging designs, modern brand presence and specific promotions. Seasonal products continue to enjoy great popularity.

COVID-19 impact on a global level



- Fueled by the COVID-19 pandemic and its continuous effects, people spend more time at home.
- Economic challenges lead to a reduction of disposable household incomes across all regions.
- Consumers therefore primarily focus on basic needs and tend to buy staple foods.
- Nevertheless, indulgence still plays a major role.
- Due to their increased health awareness, consumers are buying fewer chocolate articles in total, but tend to spend more on high quality and premium varieties.

Market data: Chocolate confectionery in Europe*

Per Capita Consumption in kg | 2020

8.6 Switzerland

7.8 Germany

7.6 UK

5.2 Poland

5.2 Russia



Retail Value RSP CAGR % | 2021 – 2025

<i>World</i>	4.6%
1. Ukraine	9.5%
2. Russia	4.5%
3. Spain	4.2%
4. Poland	3.6%
5. Italy	3.5%

Market Sizes | Total Volume | '000 tonnes

Geography	2019	2020	2021	2022	2023	2024	2025	2021 – 2025%
<i>World</i>	7,342.6	7,346.2	7,394.9	7,458.6	7,547.0	7,641.9	7,741.8	4.7% (CAGR: 1.2%)
1. Russia	738.6	756.2	740.4	735.8	740.6	751.6	762.4	3.0% (CAGR: 0.7%)
2. Germany	657.4	649.6	648.3	645.3	641.1	637.2	635.5	-2.0% (CAGR: -0.5%)
3. UK	506.5	507.4	504.7	505.6	507.4	508.7	509.3	0.9% (CAGR: 0.2%)
4. France	280.7	275.1	271.8	269.4	265.7	259.7	254.7	-6.3% (CAGR: -1.6%)
5. Poland	203.1	199.0	203.6	205.4	206.4	207.4	208.4	2.4% (CAGR: 0.6%)

Europe:* Germany, Italy, Spain, United Kingdom, Russia, France, Poland, Netherlands, Ukraine, Czech Republic, Switzerland

Market insight: Chocolate confectionery






NPD activity, 01/2018 – 01/2021, Europe*

MINTEL

Launch Type:

New Variety/Range Extension	7,541	40.0%
New Product	5,223	27.7%
New Packaging	5,143	27.3%
Relaunch	846	4.5%
New Formulation	92	0.49%
Total	18,845	100.0%

Most Active Countries:

	Germany	16.6%
	France	13.3%
	UK	11.9%
	Poland	6.2%
	Italy	5.4%

Private Label
24.0%

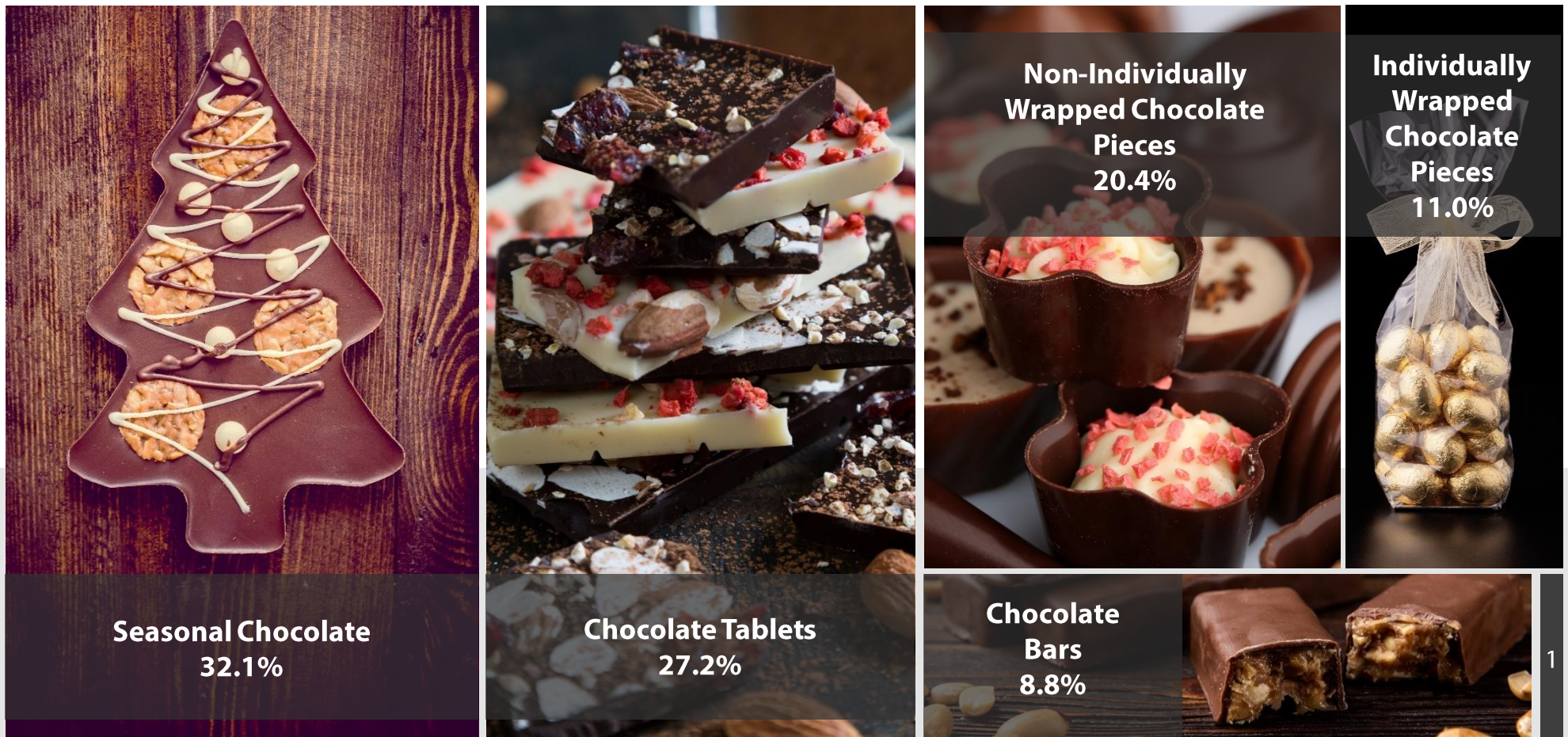
Branded
76.0%

Europe*: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine



Market insight: Chocolate confectionery

Top sub-categories, as a % of NPD in chocolate confectionery,
01/2018 – 01/2021, **Europe***



¹Others 0.5 %

Europe*: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine

Market insight: Chocolate confectionery

NPD activity, 01/2018 – 01/2021, Europe*

Mintel

Top Trending Flavours:



01 Hazelnut

02 Milk

03 Caramel

04 Almond

05 Praline

06 Orange

07 Coconut

08 Marzipan

09 Nougat

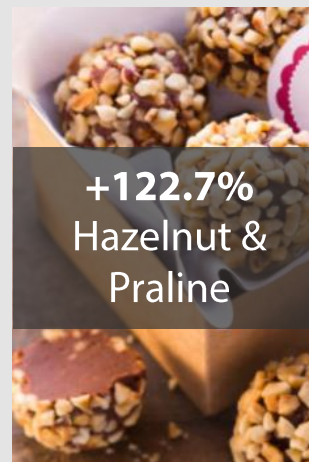
10 Raspberry

The combination of classic and popular tastes profiles with new, innovative flavours and exceptional textures forms the basis for successful new product launches.

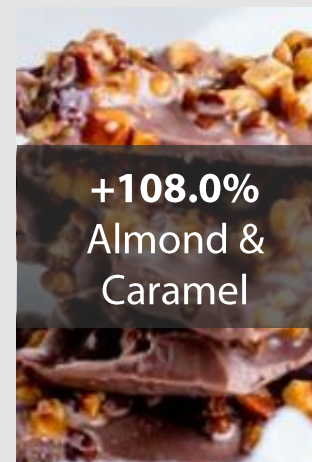
Thus, offering familiarity, enjoyment and experimentation is key for generating growth within the segment.



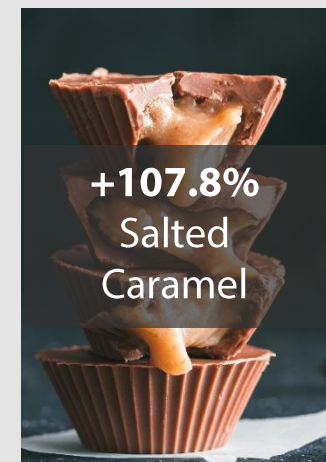
Top Growing Flavours (2018-2019):



+122.7%
Hazelnut &
Praline



+108.0%
Almond &
Caramel



+107.8%
Salted
Caramel

Europe*: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine

Market insight: Chocolate confectionery

NPD activity, 01/2018 – 01/2021, Europe*

Leading Claims:

1. Human (fair working conditions)	39.2%
2. Habitat/Resources	35.0%
3. Environmentally Friendly Product	31.8%
4. Environmentally Friendly Package	16.5%
5. Recycling	11.9%
6. Low/No/Reduced Allergen	11.8%
7. Gluten Free	10.8%
8. Organic	10.5%
9. Vegetarian	10.5%
10. No Additives/Preservatives	6.4%



Top Growing Claims (2018-2019):

+42.8%

Vegan

+33.0%

Environmentally
Friendly
Package

+25.7%

Human

+24.8%

Recycling

Europe*: Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, Ukraine

Consumer insights & product highlights: Premium treats

- **Taste** and **enjoyment** are the most important reasons for buying chocolate.
- Younger consumers in particular expect **innovative flavours**, **exciting product designs**, **special textures** and **multi-sensory experiences**.
- **Food pairing**: taste, design and texture as a holistic concept.



Waitrose & Partners No. 1
(Waitrose, UK)

This creamy milk chocolate surprises with crunchy coconut flakes and aromatic lime oil.



Truffettes de France
(Chocmod, France)

A fruity ruby chocolate wrapped around a velvety French marshmallow.



Theo
(Theo Chocolate, USA)

A hint of cinnamon combined with crispy rice and quinoa provides this creamy milk chocolate with an exciting twist.

Consumer insights & product highlights: **Healthy snacking**

- Health-conscious consumers appreciate **short ingredient lists**, the use of **high-quality raw materials** and a **high percentage of cocoa**.
- Next to **low carb** and **low fat** varieties, consumers further demand for **sugar free**, **gluten free** as well as **vegan** and **organic certified** product variants are increasingly demanded by consumers.
- Chocolate specialities have to provide **functional added values**, e.g. via using **botanical extracts** or **superfoods** such as nuts, berries and green tea.



Vivani
(EcoFinia, Germany)

This white organic vanilla chocolate is refined with caramelised hemp seeds & fleur de sel and is packaged in a plastic-free and compostable film made from renewable raw materials.



Nucao
(the nu company, Germany)

The organic bar from Nucao combines roasted almonds, melt-in-the-mouth chocolate and a pinch of sea salt. Wrapped in a home-compostable cellulose film.



Georgia
(Georgia Ramon, Germany)

White choci finely balanced with coconut flour and air-dried beetroot juice powder, refined with with small, toasted coconut chips.

Consumer insights & product highlights: **Limited classics**

- **Seasonal** and **limited** offers create curiosity and provide further buying occasions.
- Popular classics are enhanced with **exciting flavours**, **premium ingredients** or provided as **new product formats**.
- In order to attract **new target groups** and respond to **changing consumer demands**, **major food trends are incorporated into** the chocolate segment (e.g.: vegan varieties).



M&M's
(Mars, Canada)

M&Ms always surprise with exciting textures and flavours. Fans can choose between M&Ms with “crunchy sugar cookies” or a rich filling of “fudgy brownies”.



KitKat Duos
(Nestlé, USA)

Two new product creations “Mint + dark chocolate” and “Mocha + Chocolate” offer a very special twist.



Hello vegan
(Lindt & Sprüngli, Germany)

HELLO vegan presents three varieties “Cookie”, “Salted Caramel” and “Hazelnut Chocolate” based on oat drink powder. A treat for all vegan chocolate lovers.

Further opportunities & innovation drivers



FAIR TRADE

Product options highlighting their sustainable approach based on fair traded raw materials are highly popular among younger consumers.

ENVIRONMENTALLY FRIENDLY PACKAGING

In response to environmental concerns, numerous chocolate confectionery products are offered with a more sustainable or recyclable packaging.

INDIVIDUALLY DESIGNED

Personalised chocolates have become very popular during the pandemic. Brand manufacturers like Lindt have recognised the potential and offer customisable options.

CHOCOLATE PLEASURE

Innovative flavour profiles for chocolate confectionery

Chocolate enthusiasts expect a multi-sensory indulgence, created by high-quality and natural ingredients as well as extraordinary flavour combinations. Bell's versatile and unique flavour compositions for chocolate meet these product requirements. With a range of inspiring taste creations we support your product line expansion and help you to address wider consumer groups.

Get in touch with taste. Discover our exciting and indulgent flavour profiles for creating authentic chocolate treats with a premium character.

Innovative flavour profiles for chocolate confectionery



Unique and diverse flavour profiles with reliable product properties – for developing premium and delicious chocolate creations on a standardised quality level.



Natural declaration and thus in-line with today's consumer expectations and market requirements.



Market and trend-oriented inspirations for expanding your product portfolio, generating new market impulses and addressing new target groups.



Flexible usage in a broad variety of chocolate applications.



1. Cappuccino + Coconut



0528574

Coconut Flavour

Dosage:

0.25 : 100

Declaration:

Natural Flavouring

✓ **vegan**

✓ **palm oil
free**

✓ **halal
conform**

✓ **kosher
conform**

0528150

Cappuccino Flavour

Dosage:

0.2 : 100

Declaration:

Natural Flavouring

✓ **vegan**

✓ **palm oil
free**

Decoration:

Cappuccino crispies

2. Cannabis + Strawberry



4500398

Cannabis Flavour

Dosage:

0.22 : 100

Declaration:

Natural Flavouring

✓ **vegan**

✓ **palm oil
free**

✓ **kosher
conform**

0527405

Strawberry Flavour

Dosage:

0.25 : 100

Declaration:

Natural Flavouring

✓ **vegan**

✓ **palm oil
free**

✓ **halal
conform**

✓ **kosher
conform**



Decoration:

Strawberry crispies

3. Lemon + Peppermint



0527078

Lemon Flavour

Dosage:

0.25 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher conform**

0506276

Peppermint Flavour

Dosage:

0.02 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher certified**

*Decoration:
Lemon peel*



4. Banana + Cinnamon



5280033

Banana Flavour

Dosage:

0.25 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher conform**

0526205

Cinnamon Flavour

Dosage:

0.08 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher conform**

Decoration:

Ground cinnamon



5. Roasted Almond



5280149

Roasted Almond Flavour

Dosage:

0.25 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher conform**



*Decoration:
Almond slivers*

6. Truffle + Hazelnut



4500280

Truffle Flavour

Dosage:

0.02 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **palm oil free** ✓ **halal conform** ✓ **kosher conform**

0527992

Hazelnut Flavour

Dosage:

0.35 : 100

Declaration:

Natural Flavouring

✓ **vegan** ✓ **kosher conform**

*Decoration:
Chopped hazelnuts*



Contact

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