



BARRY CALLEBAUT

TOP CHOCOLATE TRENDS in 2025 & beyond

Tasting the future of indulgence



“The taste of the simple things of life give us true joy”

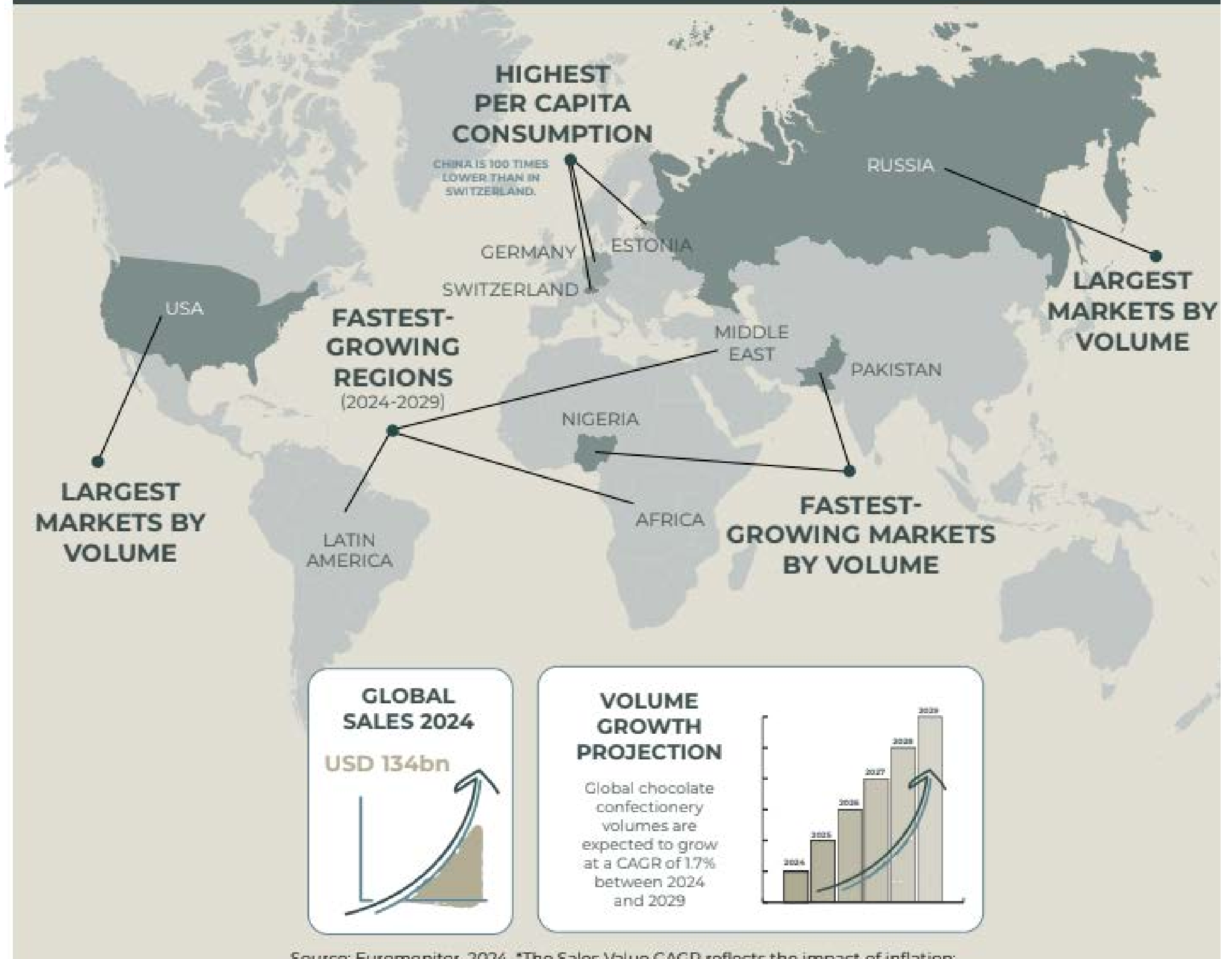
JEAN ANTHELME BRILLAT-SAVARIN*

Indulgence is being redefined. It’s no longer just about satisfying cravings—it’s about a deeper experience that connects taste with health, well-being, and ethical values

As consumers indulge, they also want their choices to reflect their commitment to the planet and their well-being. This evolution is reshaping the chocolate confectionery market, where consumers reach for options which not only delight the senses but also align with a more mindful way of living.

Our comprehensive research across 29 countries, surveying 11,700 consumers, AI-driven insights, and independent studies from our partners, reveal an evolving landscape in chocolate confectionery purchases.^{2a}

GLOBAL CHOCOLATE CONFECTIONERY MARKET 2024-2029:

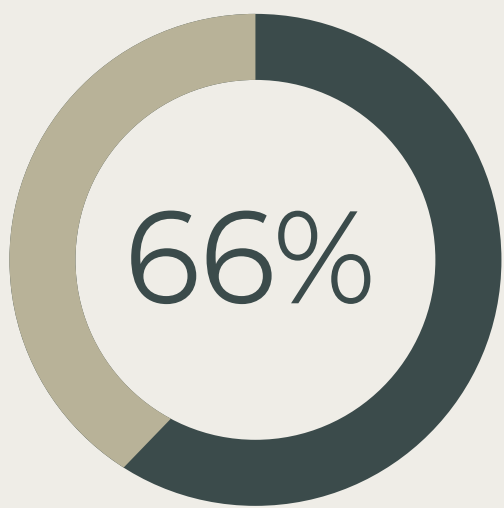


Source: Euromonitor, 2024. *The Sales Value CAGR reflects the impact of inflation:

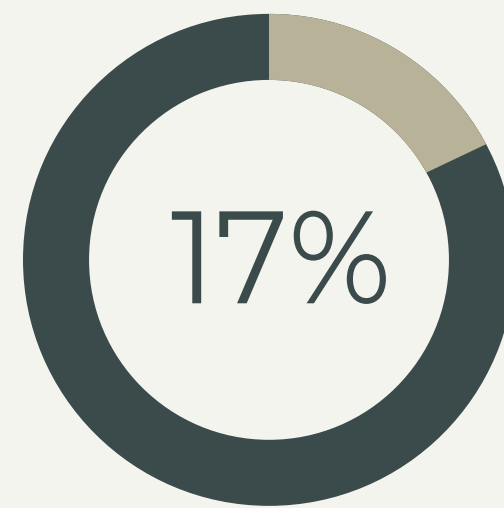
Famed gastronome and author of *The Physiology of Taste* (1825), devoted to the art of indulgence and the pleasures of taste.



In confectionery, chocolate remains one of the top purchase choices globally, with 65% of adults purchasing in the past year and a third consuming chocolate weekly¹.



More global consumers say they **increased (18%)** than **decreased (16%)** their consumption over the past year. Most consumers **(66%) have maintained the same consumption** level year to year¹.



Compared to last year, in terms of quality of chocolate confectionery products, **17% of Polish consumers are eating higher quality products** bought from an artisan shop.²

Brands are jumping on product innovation opportunities, with a significant increase in new product launches over the last 5 years. Western Europe leads this growth, with notable surges observed in Australasia and Africa¹. Among new product launches, milk chocolate remains the dominant base, followed by dark and white chocolate¹.

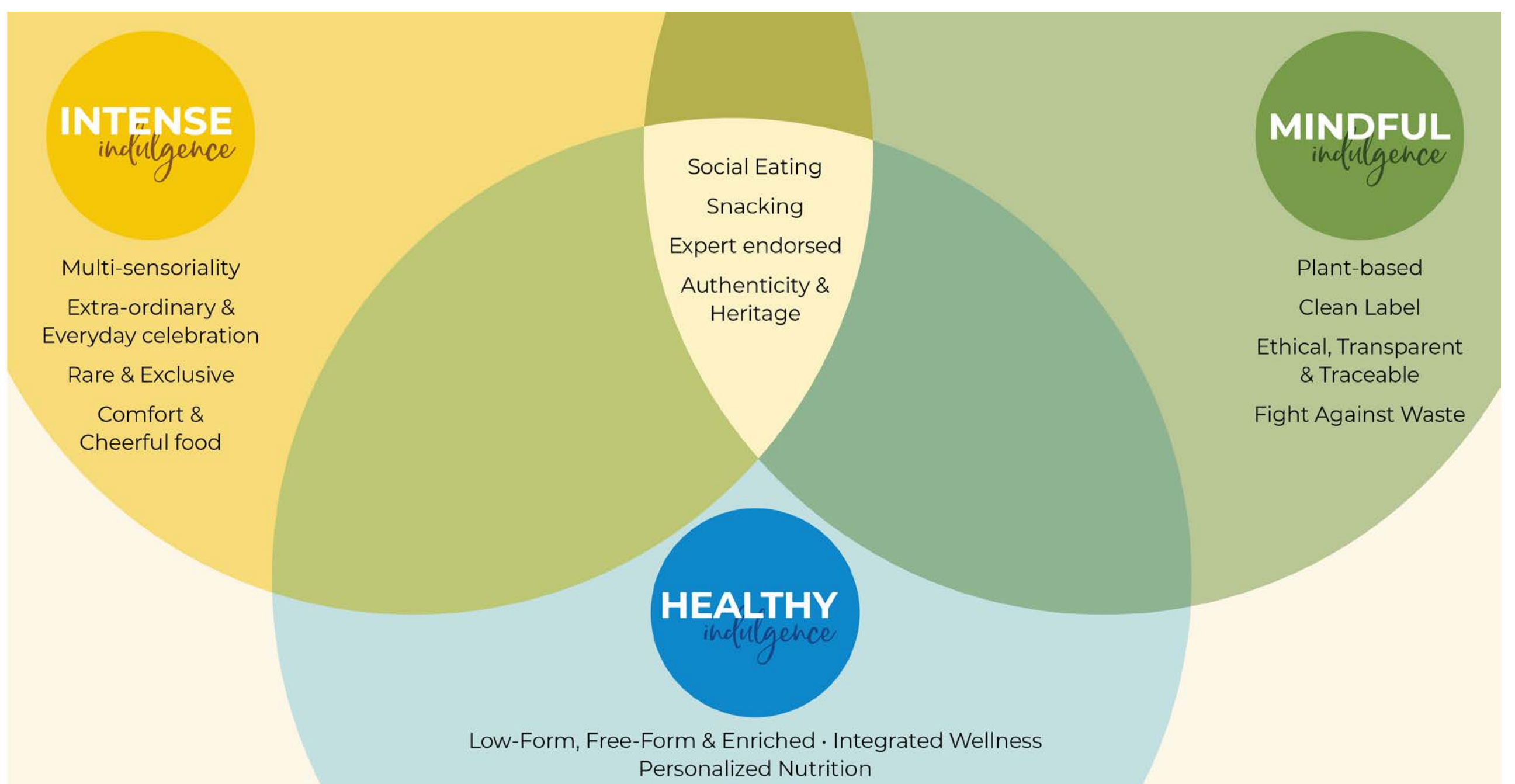
The need for indulgence and enjoyment drives consumer choices across all retail channels

Satisfying a craving and curbing hunger remain the primary reasons driving chocolate confectionery purchases in supermarkets. Meanwhile, artisanal shoppers are drawn to unique flavors and origins, often choosing chocolates to share, gift to a loved one, or mark a special occasion.²



CONSUMER TRENDS

Today’s consumers seek more than simple indulgence; they desire intense, immersive experiences, products that are mindful of the planet, and options that support their health. Despite the challenges posed by rising cocoa prices, brands are innovating with confections that cater to these **three types of indulgence—intense, mindful, and healthy**—ensuring every chocolate experience remains as tasty as it is thoughtful and delightful.



Intense indulgence

INTENSE
indulgence

Indulgence today goes beyond taste; it's about creating a complete sensory experience, tapping into all five senses—taste, texture, smell, sight, and sound—to elevate the experience of every bite.

At the checkout counter, consumers reach for options that offer more than sustenance; **they want immersive, multisensory experiences that bring delight and spark joy.** Whether it's the over-the-top luxury of a high tea with exquisite pastries or a meal in an undersea restaurant with breathtaking views, these experiences create moments worth savoring and sharing.



With their unique shapes, **the pastry shop FL Sweets** reimagines classic desserts and sweets by offering a playful and artistic interpretation which appeals on consumer's nostalgia. (Switzerland, 2024)

MULTI-SENSORIALITY

Consumers nowadays crave more than just flavor; **they seek multisensorial experiences that engage all their senses** and make eating and drinking truly unforgettable.

Whether it's the rich aroma of freshly ground cocoa, **the satisfying snap of a chocolate bar**, or the visually stunning presentation of a dessert, these experiences transform everyday indulgence into something memorable. By stimulating multiple senses, brands can create deeper emotional connections, ensuring every bite becomes a feast for the senses, and a moment worth savoring.



Lindt Sensation Crispy combines the toasted corn center with milk chocolate and a touch of salt to makes every bite a multi-sensorial treat. (Hungary, 2023)

77%

of Polish consumers prefer chocolate confectionery products that have **multiple flavors.** (2023)²

69%

of Polish consumers prefer chocolate confectionery products that have **multiple textures.** (2023)²

51%

of Polish consumers prefer chocolate confectionery products that have **multiple colors and are visually interesting.** (2023)²

CELEBRATING EVERY DAY, EXTRAORDINARILY

Beyond traditional holidays, multicultural occasions provide consumers with fresh reasons to indulge, from Diwali to the Lunar New Year. For brands, these occasions present an expanding calendar of opportunities to connect with a broader audience.

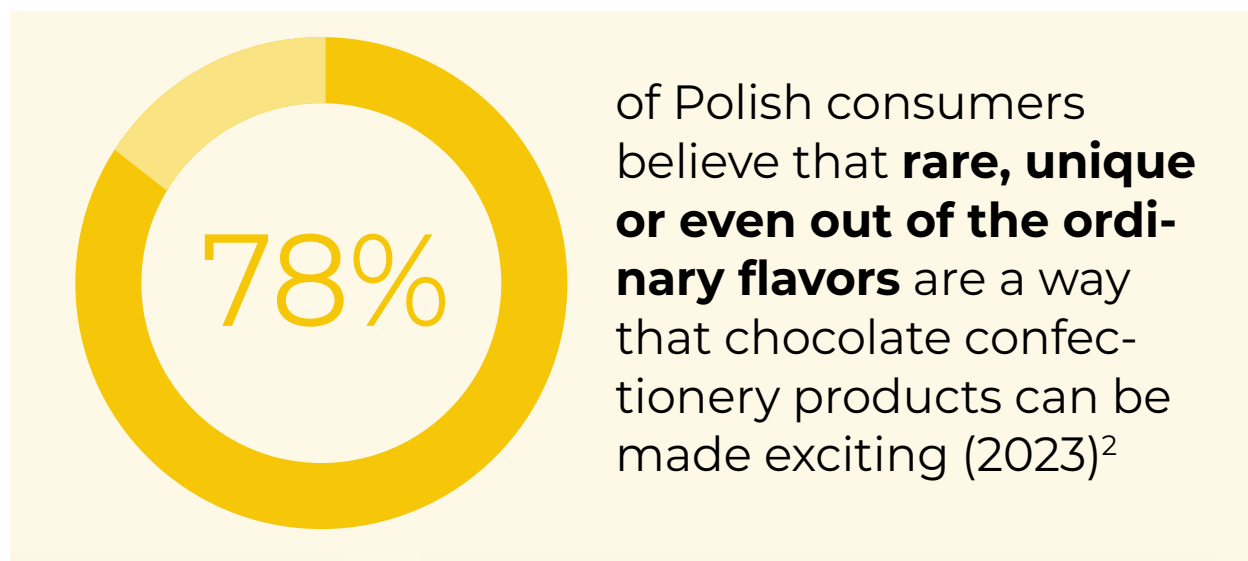


57% of Polish consumers actively seek seasonal chocolate confectionery products like Christmas, Easter, Autumn, Halloween.²



KitKat has long been associated with “breaks,” but it hadn’t celebrated the break that occurs every evening during Ramadan: breaking the fast, or Iftar. Recognizing the significance of this moment, KitKat launched a 30-piece Iftar Bar, with each piece representing a day of Ramadan. (Canada, 2024)

While major celebrations are a time for indulgence, consumers also embrace more everyday excuses to treat themselves. **From marking playful events like Chocolate Day or Ice Cream Day to celebrating the start of spring** or enjoying a simple tea time, these everyday moments of joy offer an escape from routine.



This shift towards finding joy in the ordinary highlights a growing appetite for frequent, yet distinctive, indulgent experiences that go beyond the usual.

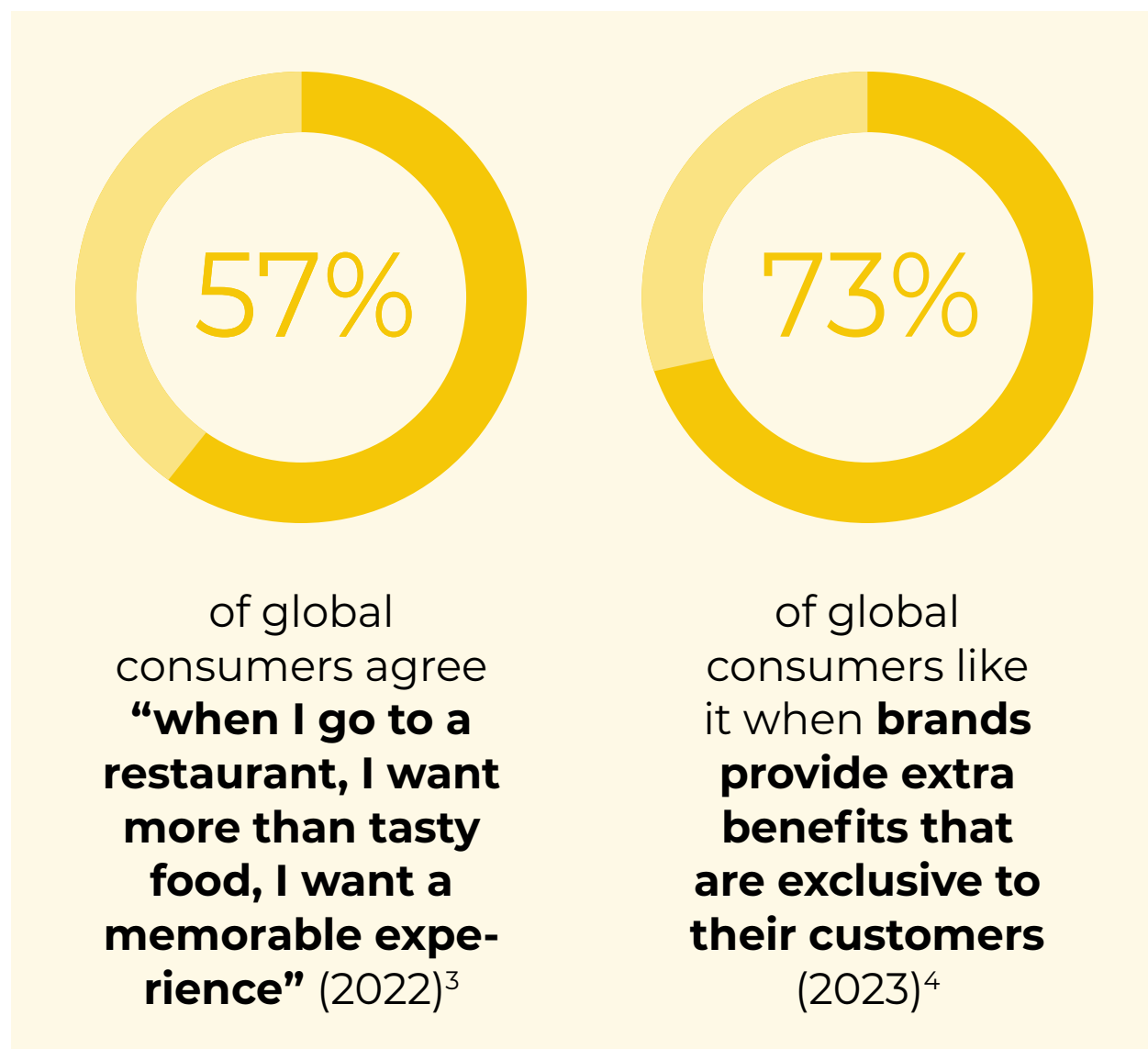


Astor released these **Moodibars** for each mood the consumer feel: from happy to silly and tired, they cover a wide range of emotions with unique flavors. A special way to treat yourself. (US, 2024)

RARE AND EXCLUSIVE

Exclusivity and managed scarcity have become powerful tools in making products and experiences feel special. **Limited editions and exclusive offerings attract consumers by creating a sense of urgency and desire.**

In a market driven by instant gratification, these rare finds satisfy a craving for immediate pleasure and offer a sense of escapism.



52% of Polish consumers prefer exclusive chocolate confectionery products or limited edition (2023)²



Davide Comaschi, renowned Italian Master Chocolatier, has teamed up with one of Italy’s most iconic and historic 3-Michelin-star restaurants (“Da Vittorio”) to craft a collection of exquisite pralines, aptly named “Carats.” **This luxurious assortment** is like a treasure chest brimming with gourmet jewels. Each praline offers a unique sensory experience: the warmth of vanilla, the rich aroma of freshly prepared tiramisu, the untamed essence of Nicaraguan cacao, the harmonious blend of warm caramel and Maldon salt, and the fragrant whispers of ginger, carried by an oriental breeze from Asia. (Italy, 2023)

COMFORT & CHEERFUL FOOD

Uncertainty about the future is leading consumers to find comfort in the past, fueling a growing nostalgia for familiar, comforting flavors. Yet at the same time, **there is a strong desire for new and surprising experiences that bring excitement** to everyday life. This blend of nostalgia and novelty allows brands to offer comfort foods that not only evoke cherished memories but also provide a fresh twist, satisfying the need for both comfort and adventure in each bite.



The **favorite Bambi Plazma Cube**, chocolate coated wafer sprinkled with crunchy biscuit pieces, now comes in a new smaller format alongside with a surprising and quite intriguing flavor combo of **white chocolate, popcorn and salty caramel**. Multiple textures and the unexpected blend of sweet and salty flavors creates a delightful surprise for the consumer & guarantee a unique and joyful snacking experience. (Serbia, 2024)

Mindful indulgence

MINDFUL indulgence

“Mindful Indulgence” isn’t just a trend—it’s a core principle we’ve used for years to understand and shape how consumers approach indulgence. It’s about blending enjoyment with purpose, where each bite of chocolate is not only a treat but also a statement of values.

Today’s consumers want more than just delicious chocolate. **They’re looking for indulgences that reflect their commitment** to doing good—for the planet, for others, and themselves. By sticking to



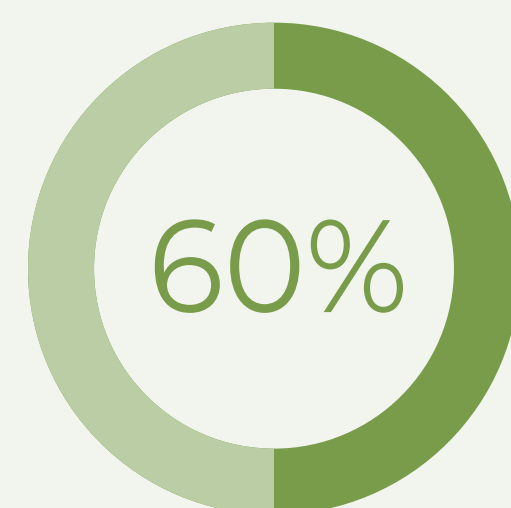
these principles, we can craft offerings that satisfy the palate while making a positive impact. **This approach ensures that indulgence isn’t just about taste—it’s about feeling good by doing good.**

PLANT-BASED

The demand for **plant-based chocolate confectionery** is on the rise, driven not just by vegans, but by a broad range of consumers. Younger consumers, in particular, seek options for both their personal health and the planet’s well-being.



“Plant-based products offer a new realm of flavor discovery, from rich dark chocolate to innovative varieties made with oat, cashew, or coconut milk.” (Tcho company, 2024)



of Polish **younger** consumers think that **every brand should have a plant-based / vegan / dairy-free chocolate confectionery option** (2023)² (VS 35% of older generations)²

These alternatives can provide a satisfying experience

without compromising on taste or ethics. With plant-based options, consumers no longer have to choose between enjoying a delicious treat and making a responsible choice—it's indulgence that's simply better for everyone.



California-based chocolate company **TCHO** converted its whole portfolio to plant-based in 2023, the quickest way to have a positive impact on the environment according to them. (US, 2024)

CLEAN LABEL

Consumers want more than just indulgence—they want products they can trust. Natural ingredients and clean labels are becoming the gold standard, perceived as safe for us and the planet.

By **combining simple, wholesome ingredients** with fun and engaging packaging, brands can deliver a mindful indulgence that's both delicious and transparent.



It's about making indulgence as honest as it is enjoyable, meeting the demand for treats that are both tasty and aligned with a cleaner, more natural approach to eating.



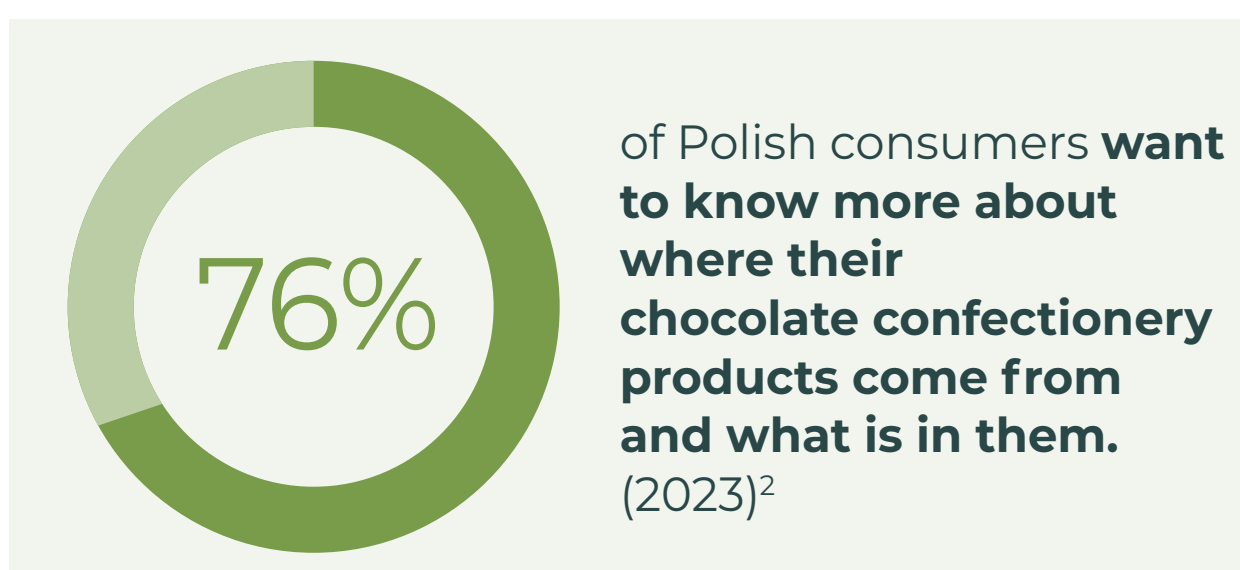
Ag Nutraceutical launched these certified organic baked coconut mix chips with crisp banana and cacao in a 30g plastic four side sealed pouch. They are also locally produced in the Philippines. (Philippines, 2024)

ETHICAL, TRANSPARENT & TRACEABLE

Today's consumers want more than just a tasty treat; **they seek chocolate brands** that are transparent about their sourcing and committed to ethical practices.

By fostering direct relationships with producers and committing to fair treatment throughout the supply chain, brands cultivate trust and loyalty. It's no longer just about where a product comes from, but how it empowers communities and supports sustainability.

For consumers, choosing chocolate is **an act of purpose that aligns with their values.** They want to know their indulgences bring positive change and support ethical practices.



Willing to pay a premium, shoppers redefine indulgence by selecting chocolate that feels good to buy and even better to enjoy, making each purchase a meaningful choice.

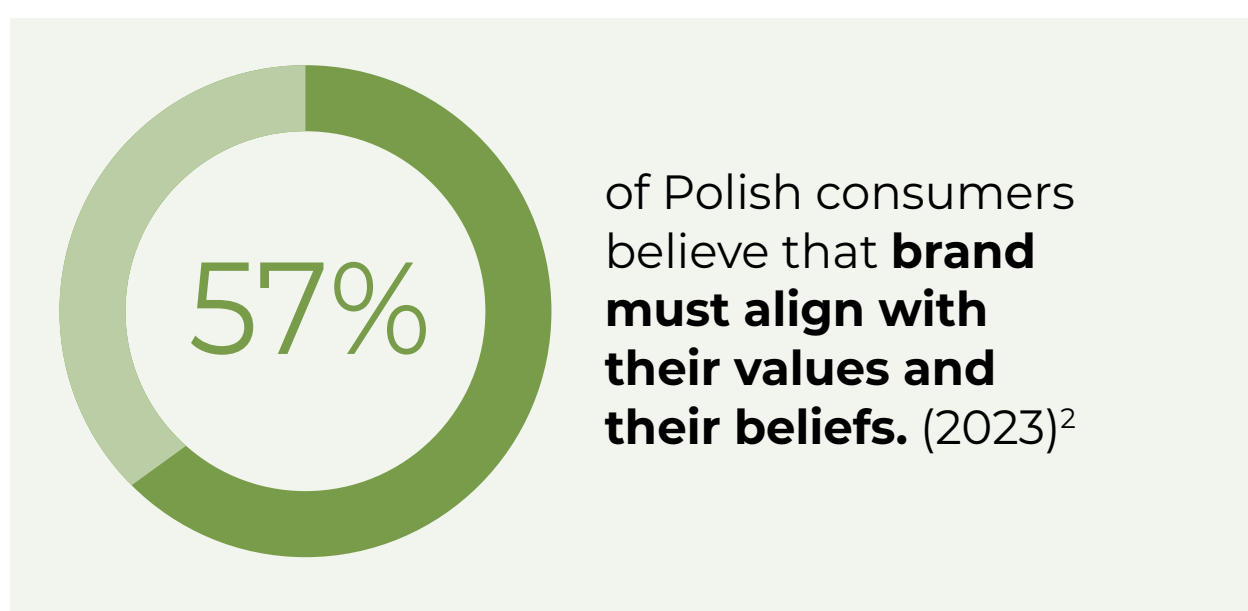


ALDI launched their new, responsibly sourced chocolate bar: The Choceur Choco Changer. As the first discount retailer, ALDI has joined **Tony's Open Chain**. All ingredients, available under Fairtrade certification, **were sourced from Fairtrade producers.** (Belgium, 2024)





Ben & Jerry's partnered with Tony's Chocolonely to end exploitation in chocolate. **This ice cream-inspired bar celebrates their commitment.** From investing in long-term partnerships with farmer cooperatives, paying cocoa farmers a higher price to making chocolate with 100% traceable cocoa. (US, 2024)



FIGHT AGAINST WASTE

The push to reduce waste is driving demand for zero-waste products and circular production methods. Consumers are excited by brands that use upcycling to create tasty, sustainable treats. New products are emerging with upcycled ingredients and brands are also using **100% compostable packaging from agricultural waste** to cut down on their environmental impact.

“Alongside farms dedicated to organic farming, we embark on this journey respecting and preserving nature”
 (Kronotrop Yiyecek, 2024)

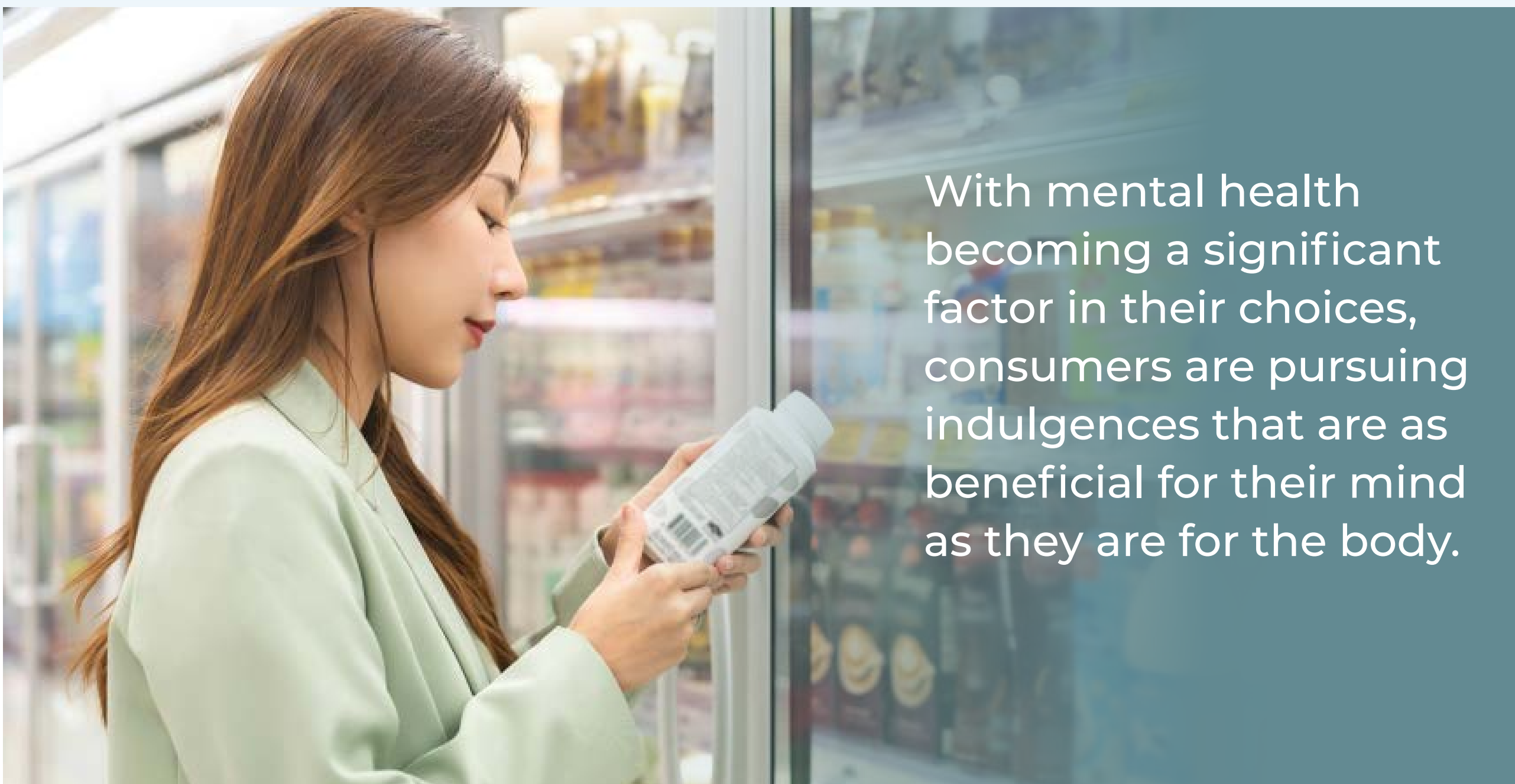


Kronotrop Yiyecek is a Turkish coffee shop famous for its **sustainable coffee**. They commit to sustainable agriculture by choosing beans from around the world based on the harvest season and they have farms dedicated to organic farming. Their dedication to the environment extends to their shops, where they use 100% recycled cardboard cups, practice waste separation, and utilise energy-efficient roasting machines. (Türkiye, 2024)

Healthy indulgence



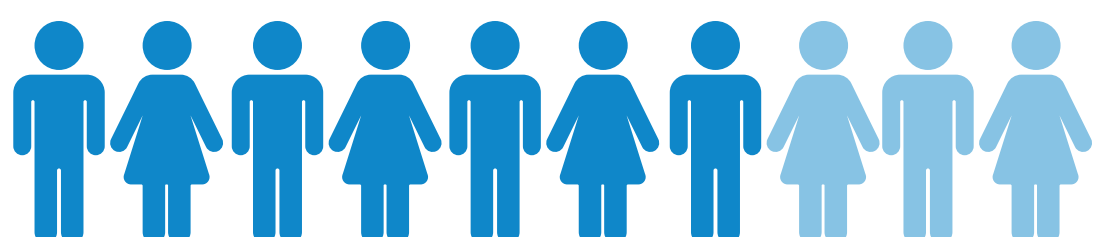
In today's chocolate confectionery market, consumers are taking charge of their health and well-being like never before. These informed, discerning individuals seek functional health products that align with their commitment to a balanced, wholesome lifestyle.



With mental health becoming a significant factor in their choices, consumers are pursuing indulgences that are as beneficial for their mind as they are for the body.

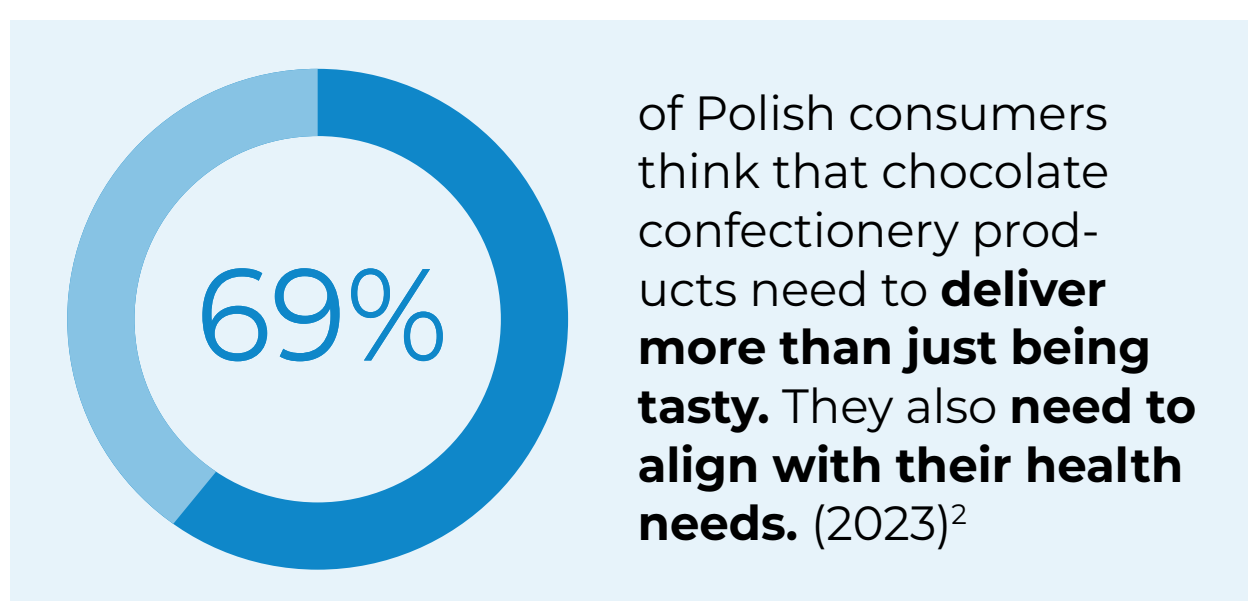
LOW, FREE-FORM AND ENRICHED

It's not just about what's left out—consumers are also looking for what's added in. As consumers are more aware of how ingredients affect their health, the demand for low- and free-from options in chocolate and confectionery has grown significantly.



69% Polish consumers are interested in chocolate confectionery products where the healthy or good for you ingredients (e.g. vitamins, proteins, etc) are added in. (2023)²

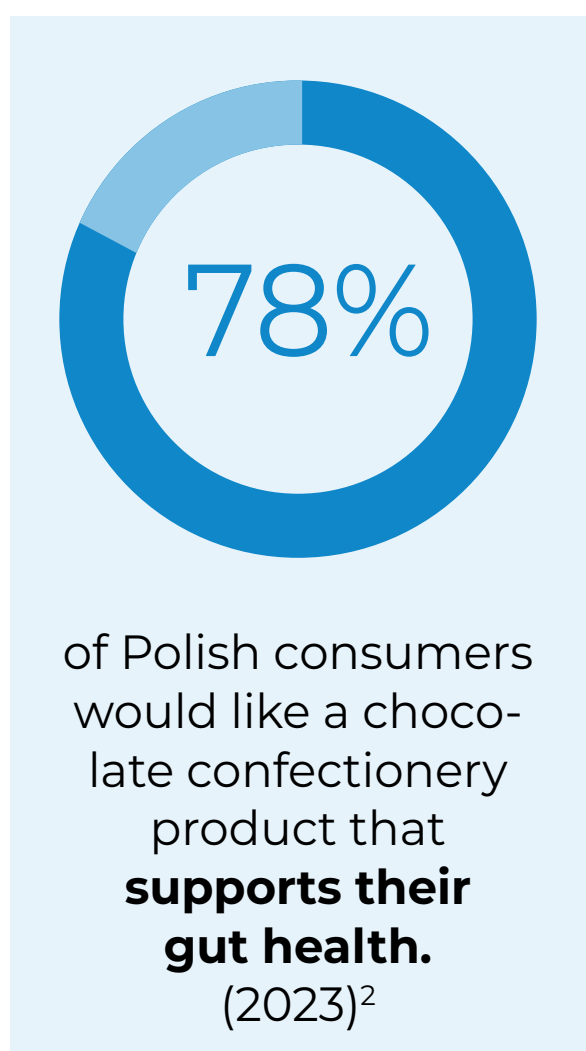
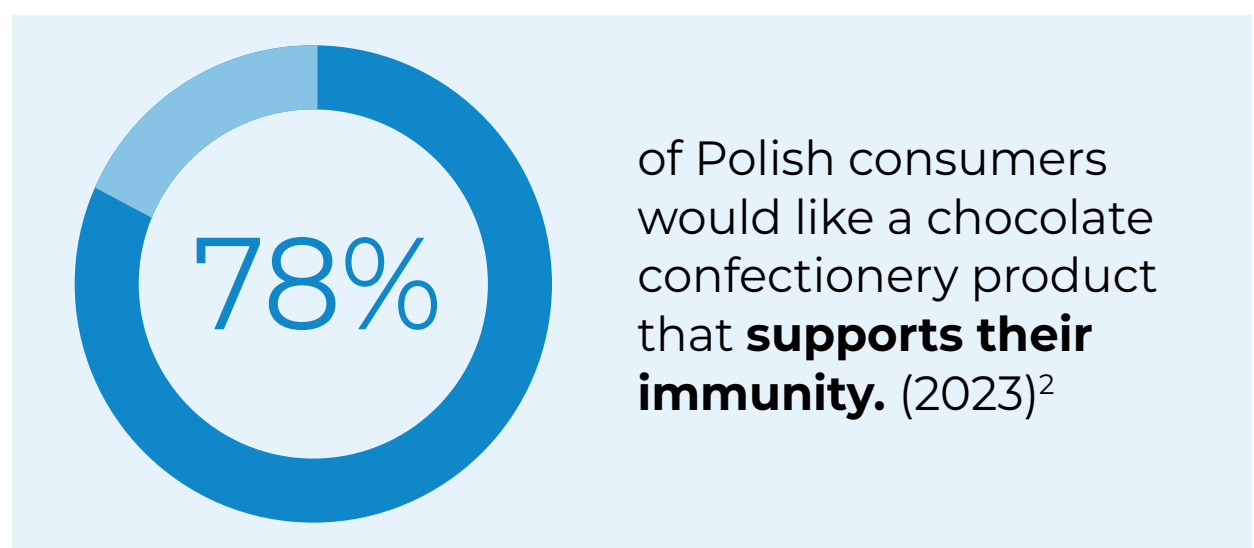
Whether it's added vitamins, superfoods, or other functional ingredients, **these health-conscious consumers expect their treats to support their overall well-being** without compromising on taste. Brands that can successfully combine low and free-from options with enriched goodness are redefining what it means to indulge health-consciously.



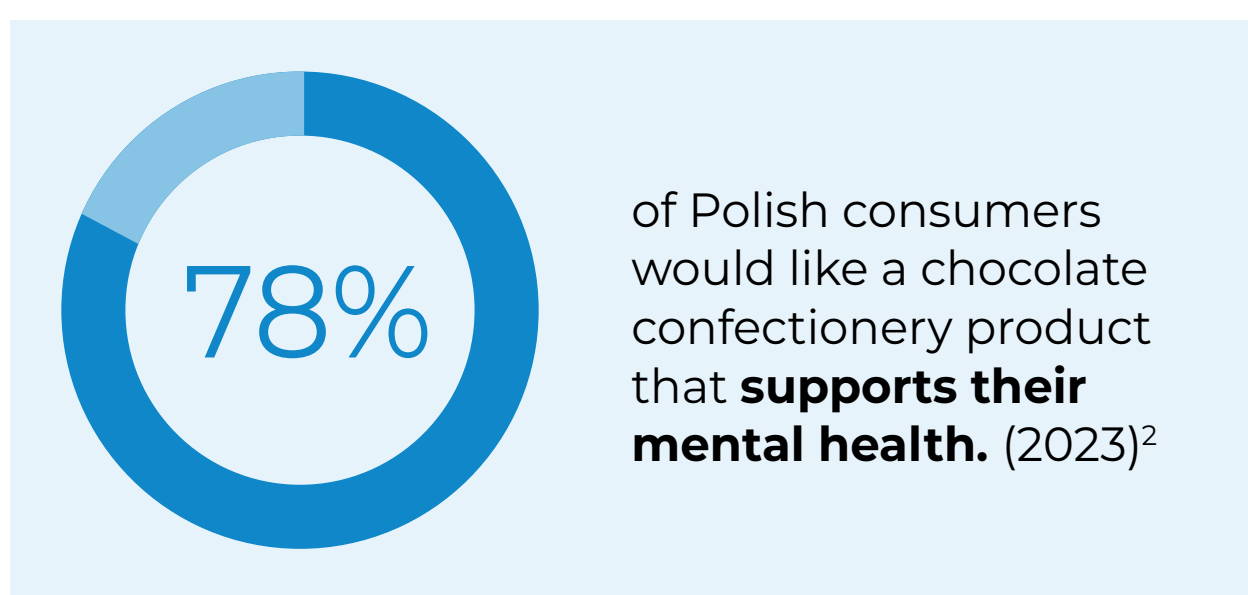
Wedel, a leading Polish chocolate brand, launched “Wedel plus magnesium,” a new product line of chocolates and bars enriched with extra magnesium citrate (in addition to the magnesium naturally contained by cocoa). Each portion provides at least 30% of an adult’s daily magnesium requirement. (Poland, 2024)

INTEGRATED WELLNESS

Consumers are increasingly driven by a desire for integrated wellness, and their reasons for choosing functional foods and drinks are expanding. **It's not just about physical health—there's a growing focus on products that support cognitive and mental wellness.**



In the chocolate confectionery market, this means more interest in functional or fortified **treats that enhance focus, reduce stress, or boost mood**. As indulgence meets mental and physical health goals, brands are innovating to offer treats that satisfy both the palate and the mind.



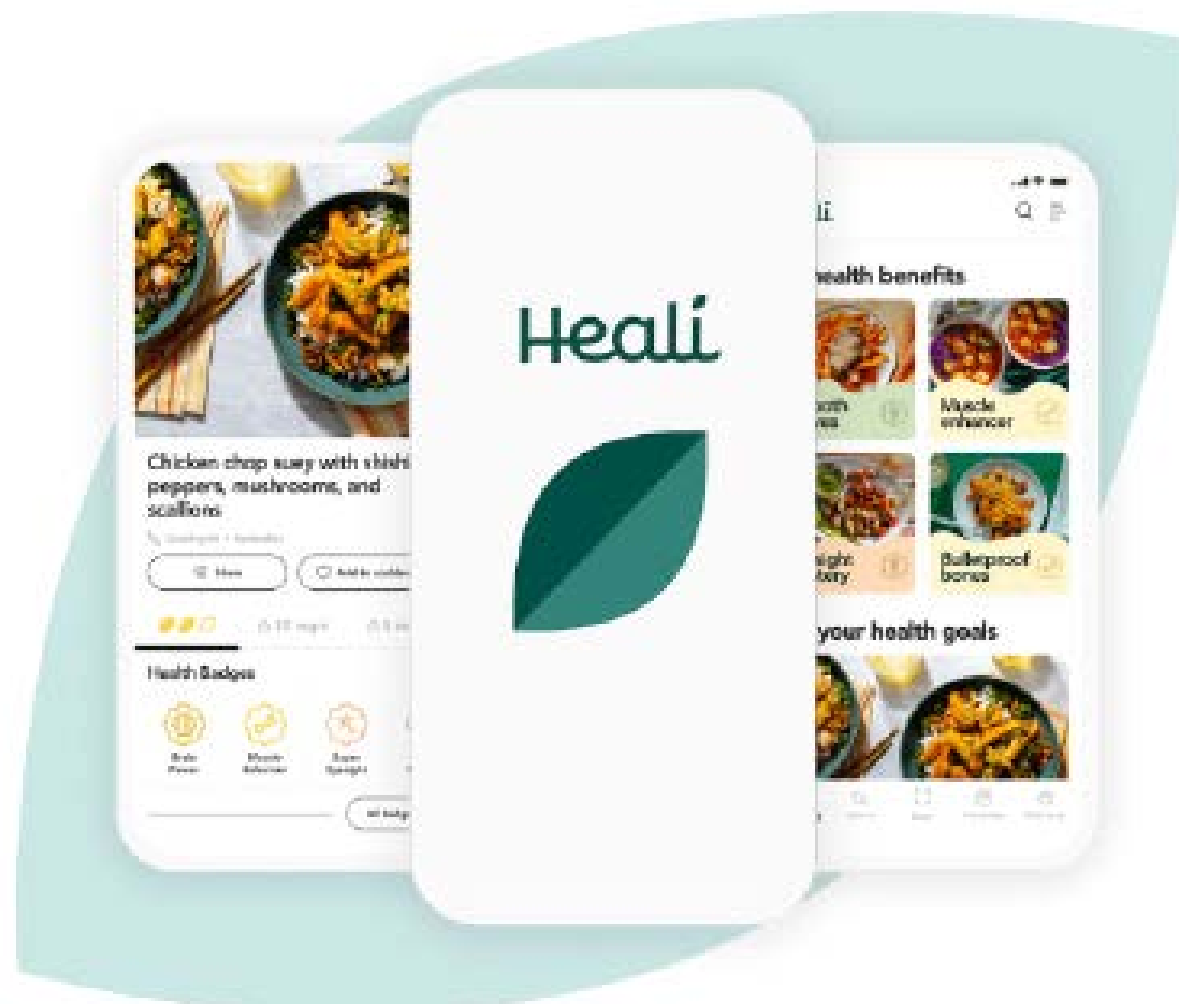
CORE Foods is introducing a range of refrigerated nutrition bars with adaptogens to support the nervous system and how the body responds to stress. (US, 2023)

PERSONALIZED NUTRITION

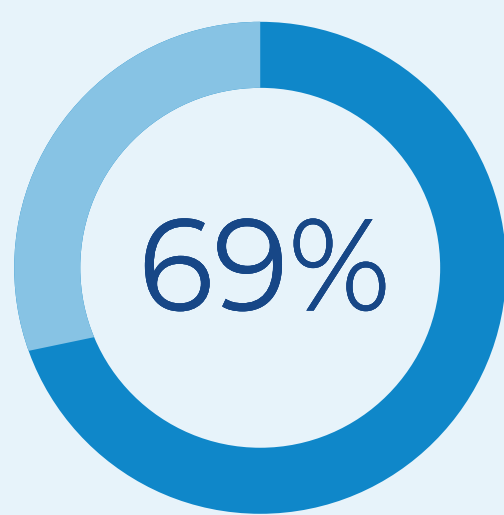
As technology continues to advance, the future of indulgence is increasingly personalized. With more **accessible diagnostics and the growth of wearable devices**, consumers can now monitor their health in real time, leading to more informed and tailored food choices.

Personalized mobile platforms are emerging to eliminate the guesswork, offering evidence-based nutrition protocols that **help manage health conditions through diet**. Brands that embrace this trend are creating bespoke indulgences, allowing consumers to enjoy treats that not only satisfy their cravings but also support their personal health journeys.

69% of Polish consumers actively seek brands that align with their healthier lifestyle choices², and 61% agree that they like the brands and companies they buy from to recognize them as a customer.⁶



Launched in November 2023, **Heali is a startup with a personalised platform** for people who want to eliminate the guesswork and treat and manage their health conditions using evidence-based nutrition protocols. (US, 2023)



of Polish consumers would like to **have more tailor made or personalized** chocolate confectionery products. (2023)²

Cross-domain trends

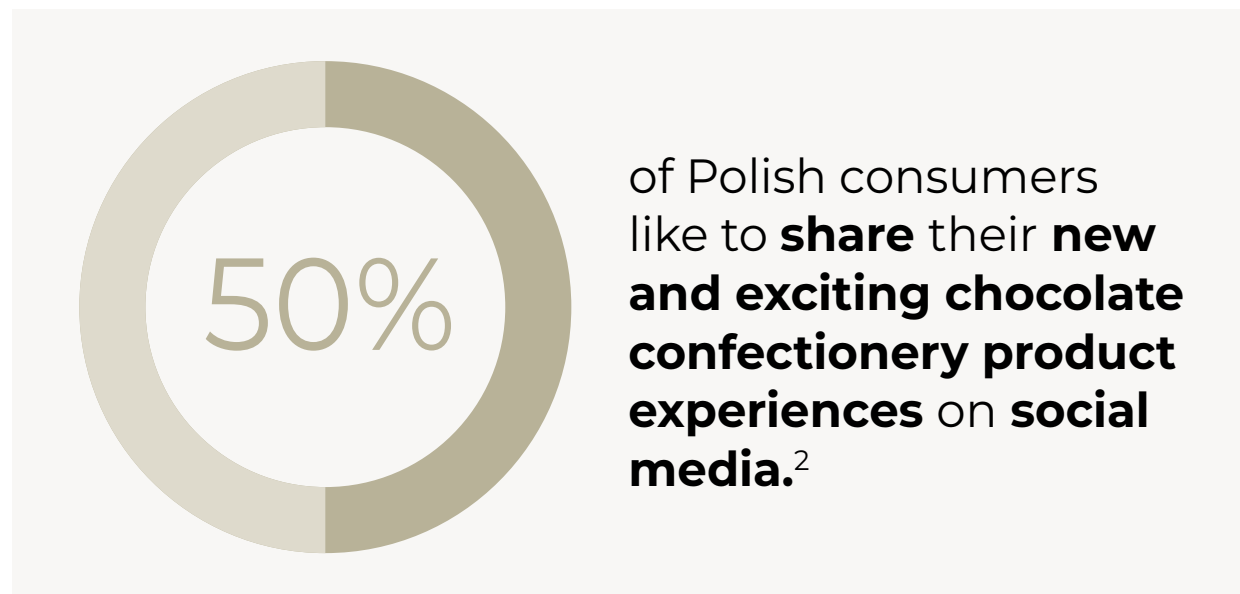


Indulgence is no longer confined to single categories—trends are increasingly interconnected, responding to a wide range of consumer desires. Today's consumers seek more than just a tasty treat; they seek indulgences that align with their values, support their lifestyles, and offer a deeper sense of purpose.

These overlapping trends reflect the complexity of modern preferences, where taste, ethics, and well-being converge to create richer, more meaningful experiences.

SOCIAL EATING

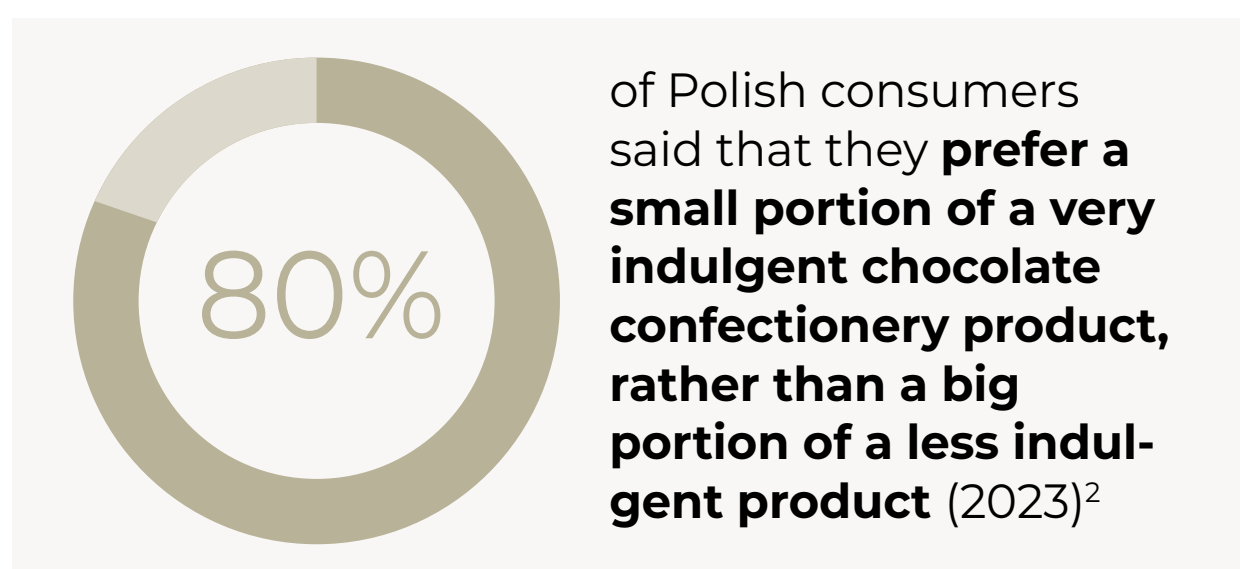
Food and drink are more than just sustenance—they are a catalyst for connection, **bringing people together and enhancing shared moments**. Consumers are drawn to indulgences that foster community and togetherness, making every meal or snack a social experience.



Jezyki coolki by Colian are traditionally they were sold as regular cookies, but recently they launched a series of **bite size** multi-texture options perfect for various **social occasions** as they simply invite people to get together and share. (Poland, 2024)

SNACKING

Snackable indulgences are on the rise, offering bite-sized moments of pleasure and a convenient boost throughout the day. These small, satisfying treats cater to the desire for quick yet meaningful breaks, fitting seamlessly into active lives.

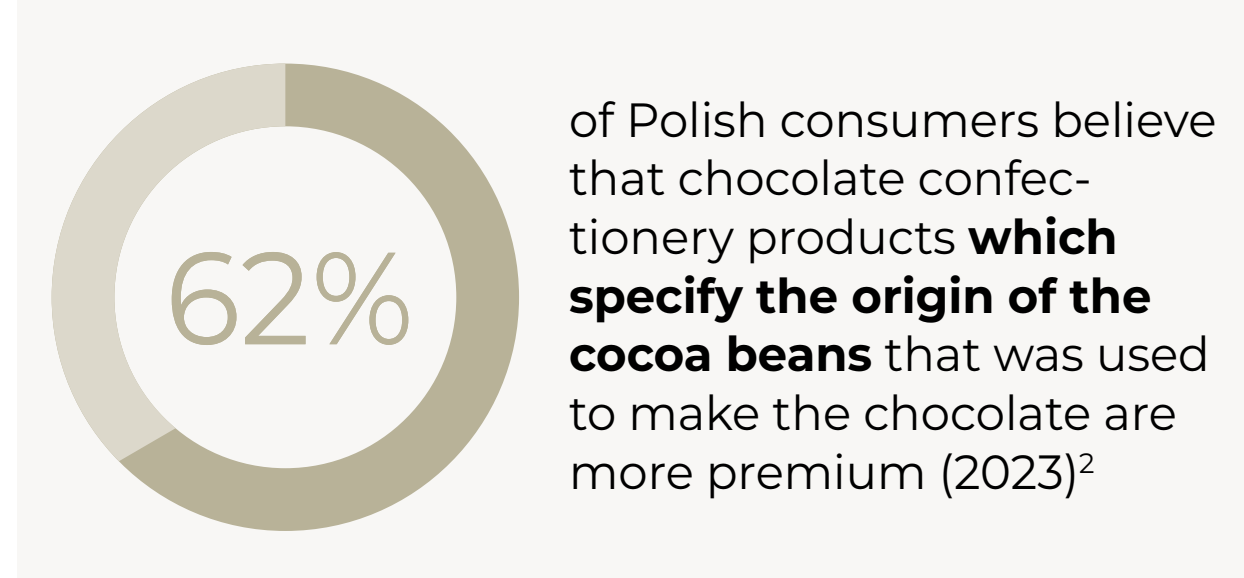
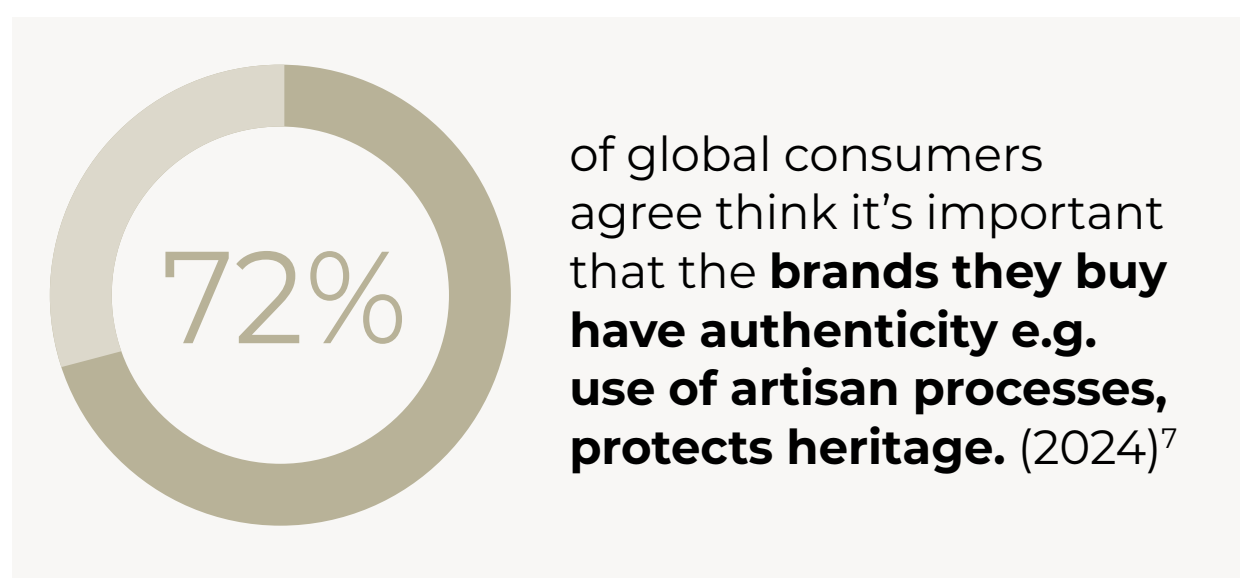


The iconic Austrian wafer in a new shape. The Manner Cubidoos are bite-sized crispy wafer pieces in a reclosable package perfect for the office, the movies, or when driving. They are filled with the beloved Original Manner Neapolitan Hazelnut Cream and covered in milk chocolate. (Austria, 2021)

AUTHENTICITY AND HERITAGE

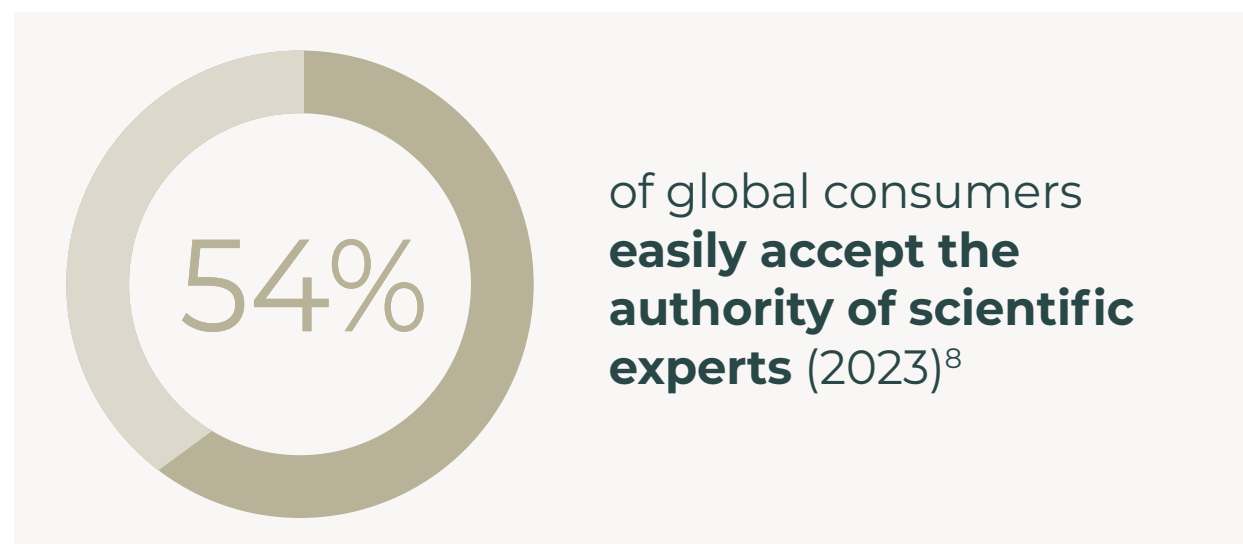
Nostalgia and tradition are powerful drivers, with consumers gravitating towards products that evoke trust and authenticity. **They seek indulgences that feel genuine, rooted in heritage, and rich with stories** of origin, providing comfort and connection.

Inspired by an age-old Italian tradition, **Starbucks launched a new range of coffee** with extra-virgin olive oil called Oleato. Each of the five drink options in the range includes extra-virgin olive oil from Partanna – a 100-year-old Italian company. (US, 2023)



EXPERT ENDORSEMENT

Consumers increasingly look for brands that are backed by experts, from scientists to chefs. These endorsements add a layer of credibility and trust, appealing to those who want assurance that their indulgence is both high-quality and beneficial.



Canadian tea brand Tetley released its new Live Tea collection. The caffeine-free teas—Live Happy, Live Balanced, Live Bold, Live Calm, and Live Cool—were developed in collaboration with happiness expert Dr. Gillian Mandich. (Canada, 2024)

1) Source: Innova, July 2024, “Now and Next in Global Chocolate Confectionery”
 2.a) Source: Barry Callebaut proprietary study, fielded online using Qualtrics in August 2023, in Belgium, Brazil, Canada, Chile, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, Poland, Spain, Sweden, Switzerland, Turkey, the UK, the US. N= 7697. The aggregated global insights are based on the above 19 countries to ensure an equal geographical spread. Specifically, the study covers four relevant categories (Chocolate Confectionery, Ice Cream, Cakes & Pastries, and Cookies/Biscuits) as well as generational differences (younger vs older generations).
 2) Source: Barry Callebaut proprietary study, fielded online using Qualtrics in August 2023, in Poland. N=405. Specifically, the study covers four relevant categories (Chocolate Confectionery, Ice Cream, Cakes & Pastries, and Cookies/Biscuits) as well as generational differences (younger vs older generations).
 3) Source: Foresight Factory, March 2022 | Base: 593-3790 online respondents per country aged 16-64 [Australia, Brazil, Canada, China, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Russia, Singapore, South Korea, Spain, Sweden, Thailand, UAE, USA, Vietnam.]

4) Source: Foresight Factory, March 2023 | Base: 595-3796 online respondents per country aged 16-64 [Australia, Brazil, Canada, China, Colombia, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, UAE, USA]
 5) Source: Foresight Factory, March 2023 | Base: 600-3829 online respondents per country aged 16-64 [Australia, Brazil, Canada, China, Colombia, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, UAE, USA]
 6) Source: Foresight Factory, March 2024 | Base: 715-3735 online respondents per country aged 16-64 [Australia, Brazil, Canada, China, Colombia, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, UAE, USA]
 7) Source: Foresight Factory, March 2024 | Base: 709-3678 online respondents per country aged 16-64 [Australia, Brazil, Canada, China, Colombia, Denmark, Finland, France, GB, Germany, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Netherlands, Poland, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Thailand, UAE, USA]
 8) Source: Foresight Factory, January 2023 | Base: 1000-2100 online respondents per country aged 16+ [Australia, Brazil, China, France, GB, Germany, South Korea, Sweden, USA]



WE ARE HERE TO HELP YOU
**CRAFT TASTY AND INNOVATIVE
CHOCOLATE EXPERIENCES THAT
ALIGN WITH THE LATEST TOP
CHOCOLATE TRENDS.**



Contact us now for a tailored solution:

<https://www.barry-callebaut.com/contact>