

CHOCOLATE CONFECTIONERY – GERMANY – 2022

Further NPD in mini formats has big potential as BFY reformulation receives mixed reaction. Tapping into the 'less but better' mindset is a key means for chocolate to stay on the menu.



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Chocolate Confectionery - Germany - 2022

This report looks at the following areas:

- Usage frequency of chocolate and most-eaten types, with chocolate blocks being in the leading position, followed by chocolate bars
- Attributes that would prompt to buy one chocolate over another, with the favourite flavour being most important when buying chocolate for oneself and high-quality ingredients when buying chocolate as a gift
- Behaviours regarding chocolate, with eg consumers being more willing to eat less of regular chocolate than low-sugar chocolate
- Attitudes towards chocolate, with eg chocolate benefitting from consumer views that it can make a night in more special
- Trends in launch activity and opportunities for further innovation



Further NPD in mini formats has big potential as BFY reformulation receives mixed reaction. Tapping into the 'less but better' mindset is a key means for chocolate to stay on the menu.

Overview

Only 10% of German chocolate buyers report that health-related aspects would prompt them to choose a chocolate product over another when buying it for themselves. Consumers mostly want indulgence from chocolate; however, they are also becoming increasingly aware of the health hazards of sugar. Permissible indulgence is therefore a promising area for innovation.

As inflation is currently high, with experts predicting a further increase over the coming months and consumers' incomes squeezed, we can see **private label chocolate brands**

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gaining further share of NPD in the near future. Promotions will also appeal to consumers and **appeal even more than generally low prices**.

As health-conscious consumers scrutinise their food choices, the pressure is on for the more **indulgent food options**. Chocolate is a taste-led category, **but consumers are becoming increasingly aware of the detrimental effects of sugar**. This represents a **major challenge for the industry**, as **recipe changes to reduce sugar puts many consumers off**. They rather eat less of regular chocolate.

Portion control remains a key means for brands to stay on the menu. Indeed, **62% of chocolate eaters/buyers** would choose to eat a smaller amount of regular chocolate rather than eat reduced-sugar chocolate. Chocolate in smaller formats, therefore, has great potential.

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Report Content

EXECUTIVE SUMMARY

- Overview

Key issues covered in this Report

- The five year outlook for the category

Market context

- Chocolate has near-universal usage and chocolate bars are the favourite format
- The chocolate industry is faced with the health vs indulgence dilemma
- Sugar reduction is a top priority for companies, but reformulations risk alienating consumers
- As inflationary pressure rises, chocolate may benefit from the 'lipstick effect'

Mintel predicts

- Chocolate value sales predicted to grow steadily
- Chocolate confectionery will see modest value growth of 9% by 2026
- Market size & forecast

Opportunities

- Tap into the 'less but better' mindset with smaller formats
- Step up innovation in vegan chocolate
- Communicate ethical credentials tangibly to resonate with consumers
- Get serious about sustainable packaging innovation
- Tap into the night-in occasion
- Brands that already target the night-in occasion

The competitive landscape

- Ferrero remains in the leading position
- Ferrero remains the leading brand in the chocolate confectionery market in terms of value...
 - Graph 1: company shares of chocolate confectionery, by value, 2021
- ...and volume
 - Graph 2: company shares of chocolate confectionery, by volume, 2021
- Quick download resources

MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth

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- Graph 3: key economic data, in real terms, 2019-23
- The impact of the economy on chocolate confectionery
- Where price rises are inevitable, honesty is the best policy
- Chocolate brands are facing the health vs indulgence dilemma
- Germany is faced with an obesity crisis
 - Graph 4: average BMI, 2019 vs 2020

WHAT CONSUMERS WANT AND WHY

Frequency of eating chocolate and types of chocolate eaten

- Nine in 10 Germans eat chocolate
 - Graph 5: frequency of eating chocolate confectionery, 2020 vs 2021
- Chocolate blocks continue to be most popular
 - Graph 6: types of chocolate eaten, 2020 vs 2021

Buying factors for chocolate by occasion

- Flavour and high-quality ingredients are the top attributes when purchasing chocolate
 - Graph 7: attributes that would prompt to buy one chocolate product over another as a gift, 2021
 - Graph 8: attributes that would prompt to buy one chocolate product over another for oneself, 2021
- Younger consumers place greater importance on ethical certifications, but they are also more price sensitive
 - Graph 9: low price and ethical certifications as attributes that would prompt to buy one chocolate product over another when buying for oneself, 2021
- Highlighting provenance can build quality associations and encourage gifting
- Explore gourmet ingredients to elevate the chocolate experience

Behaviours regarding chocolate

- Ethical and environmental consciousness are no longer nice-to-haves
 - Graph 10: behaviours regarding chocolate, 2021
- Especially young consumers expect companies to treat workers ethically
- Tony Chocolonely leads the dialogue on ethical cocoa farming with educational events
- Identify health seekers and indulgence seekers
- Cocoa fruit pulp and juice used as an alternative to refined sugar
- Major brands innovate in the sugar reduction space
- Lini's Bites claim that healthiness doesn't have to come at the expense of indulgence

Attitudes towards chocolate

- Chocolate in smaller formats have big potential
 - Graph 11: attitudes towards chocolate, 2021
- Portion control remains a key means for brands to stay on the menu

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- 'Night-in' occasion is a promising opportunity for chocolate
- 2 in 5 chocolate consumers would pay more for sustainable packaging
- Industry leaders look to alternative materials to reduce reliance on plastic
- Young Germans are the key target group for vegan chocolate
- Major chocolate companies enter the vegan chocolate market

LAUNCH ACTIVITY AND INNOVATION

- Many ethical claims have increased since 2017
 - Graph 12: launches of chocolate confectionery, by ethical claims, 2017 vs 2021
- Over half of chocolate launches feature human-related claims
- Sustainable packaging claims on the rise
 - Graph 13: launches of chocolate confectionery with environmentally friendly or recycling claims, 2017-20
- Rettergut shows great efforts to reduce food waste
- Mars further adds to its BFY chocolate range since 2021
- Vegan formulations continue to attract innovation
 - Graph 14: launches of chocolate confectionery, by vegan, dairy-free and plant-based claims, 2017-20
- Nestlé adds new flavours and innovates with eye-catching design
- Ferrero taps into popularity of blocks
- Crunchy, chunky and smooth are the most common textures in chocolate confectionery

Advertising and marketing activity

- Lindt's Excellence Cacao Pur
- Tony's Chocolonely addresses the health issue its products bring

MARKET SHARE

- Brands remain dominant in the chocolate market

Retail market share of Chocolate Confectionery, by value, 2019-21

- Ferrero remains the leading brand in the chocolate confectionery market in terms of value...

Retail market share of Chocolate Confectionery, by volume, 2019-21

- ...and volume

MARKET SIZE, SEGMENTATION AND FORECAST

- Chocolate will continue to grow over the next five years, albeit moderately
- Chocolate confectionery will see modest value growth of 9% over 2022-26
- Volumes projected to grow by a faint 4% over 2022-26
- Pralines lead value and volume sales

- Pralines, special forms of chocolate and chocolate bars see a strong boost in value sales in 2021
- Block chocolate and chocolate dragees/lentils have lost volume share in 2021

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – value
- Market size – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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