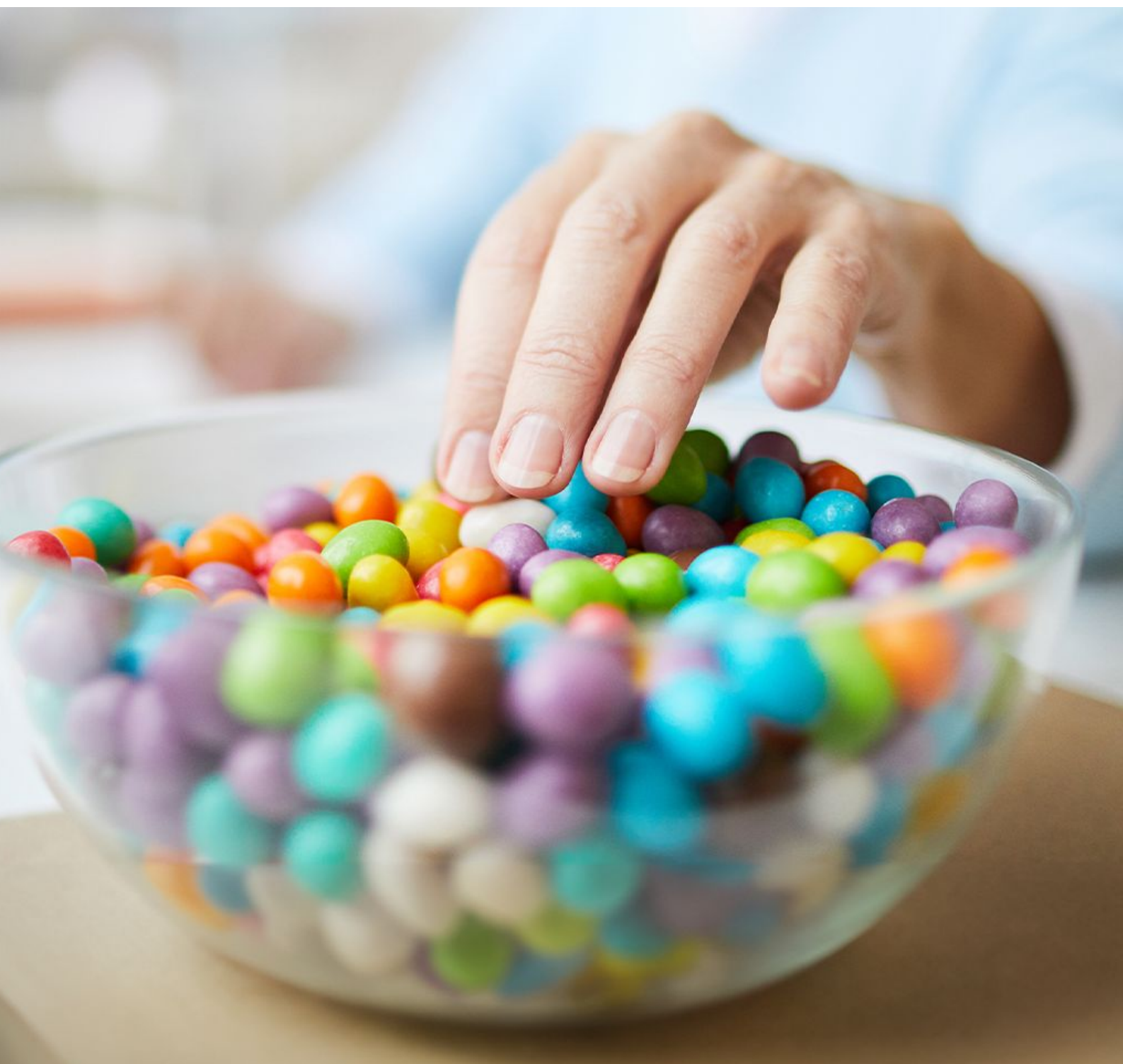


# SUGAR & GUM CONFECTIONERY – GERMANY – 2023

Position sweets as inexpensive mood boosters. Look beyond breath freshening to target gum users. Focus on flavour in BFY offerings.



Khalid Peerbaccus, Food  
& Drink Senior Analyst



# Sugar & Gum Confectionery - Germany - 2023

## This report looks at the following areas:

- Market drivers for sugar and gum confectionery, including the impact of inflation and growing health awareness
- Sugar and gum confectionery usage and changes in consumption since 2021
- Frequency of sugar and gum confectionery consumption, including the usage of gum among younger Germans and the potential for tie-ins with streamers to drive sales
- Motivations for gum usage and potential to offer more than fresh breath such as concentration boosting and appetite suppressing
- Interest in flavours of sweets and how tastes change with age
- Behaviours related to sugar and gum confectionery and the potential to capitalise on social media
- Attitudes towards sugar and gum confectionery and the need to boost the image of sweets for gifting occasions
- Recent product launch activity and innovation



Position sweets as inexpensive mood boosters. Look beyond breath freshening to target gum users. Focus on flavour in BFY offerings.

## Overview

The high cost of sugar alongside soaring energy rates, have led to **cost increases that can no longer be absorbed by manufacturers**, which will result in higher prices, [driving retail value sales](#). Price increases will likely be accepted by many, given the **relative affordability** of confectionery.

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Consumption of sugar and gum confectionery dipped slightly following the pandemic due to consumers taking stock of their health and eliminating non-essential costs as well as Germans returning to work and diminished opportunities to indulge at home.

With 47% of Germans relegating sweets to a **low-priority spend** when money is tight, sweets must enhance their image as an essential, affordable mood booster.

Gum is used by fewer Germans, but is consumed more frequently than sweets due to its lower sugar content. Gum could be positioned for usage beyond breath freshening such as appetite suppressing, therefore, targeting those looking to manage their weight.

Greater **attention to flavour and texture in the category will help sugar and confectionery** attract young Germans, particularly the 41% of 16-34 year old Germans who like to try out new foods/flavours. Catering to older consumers must be a top priority and focusing on their specific taste palates by offering less-sweet flavours will be key in attracting this demographic.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for sugar and gum confectionery

### Market context

- Sugar reduction gives BFY sweets a tailwind
- An ageing population will affect the variety of sweets eaten
  - Graph 1: repertoire of types of sweets eaten, 2023

### Mintel predicts

- Market size & forecast
- Sales will benefit from increased prices while volume will increase due to mood-boosting effects
- Expect moderate increase in volume sales
- Increase in raw ingredient costs drives value growth

### Opportunities

- Smaller portions reduce the sugar but retain the flavour
- Leverage the versatility of gum usage
- Create excitement through flavour and texture to target younger Germans
- Use natural ingredients to boost sweets as part of a balanced diet

### The competitive landscape

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# Sugar & Gum Confectionery – Germany – 2023

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- Highlighting the health-boosting properties of herbs
- Respect for animals enhances the appeal of sweets
- Sour flavours are a popular choice for German sweet eaters
- Thinking outside the box when it comes to sweet-eating occasions

## MARKET SHARE

- Market share in sugar and gum confectionery
- Haribo gains the most share in 2022
- Haribo's constant stream of new launches helps it gain the most volume share in 2022

## MARKET SIZE, SEGMENTATION AND FORECAST

- Retail volume/value sales see growth, owing to higher prices and sweets being seen as permissible treats
- Retail value sales of sugar and gum confectionery, 2020-22



- Rising costs of raw materials is likely to drive up value sales
- Retail and other volume sales of sugar and gum confectionery, 2020-22
- Volume sales will rise moderately

## 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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