

Europe Confectionery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The Europe Confectionery Market size is estimated at 69.40 billion USD in 2024, and is expected to reach 90.90 billion USD by 2030, growing at a CAGR of 4.60% during the forecast period (2024-2030).

Supermarkets and convenience stores collectively account for more than 75% of the market share as nationwide store chains allow broader reach and easy access to multiple brands

Supermarkets/hypermarkets have always maintained a strong lead in the sales of confectionery in the region. Chocolate is largely sold confection through supermarkets and hypermarkets, with a market volume share of 50.89% in 2022. Strategic product positioning on the dedicated shelves for the confectionery category influences impulse purchase behavior among potential consumers. Casino Supermarkets, Carrefour, Super U, and Lidl are some of the leading grocery store operators in the region. A nationwide network of these operators allows easy access to local and mainstream confectionery brands. As of 2023, Lidl operated more than 3,000 and 1,500 stores in Germany and France, respectively. Carrefour operates around 2,869 supermarkets across the region.

Convenience stores are the second most widely preferred distribution channel after supermarkets and hypermarkets for purchasing confectionery. The volume sales of confectionery through convenience stores is estimated to register a 38.96% volume share in 2024. The broader reach and easy access to private label brands drive the consumer preference for traditional grocery stores over other retail channels. Snack bar

sales are estimated to grow at the highest CAGR through convenience stores, reaching a sales value of USD 1,761.98 million in 2030.

The online channel is projected to be the fastest-growing distribution channel for confectionery, with an anticipated CAGR of 6.13% in terms of value during the forecast period. The increasing number of internet users influences the evolving role of online channels in grocery purchases. In 2022, 68% of European consumers aged 16 to 74 bought online goods or services for personal use.

High consumption of chocolates and candy across Germany, the United Kingdom, and France contributes to the growth of the confectionery market in Europe

The United Kingdom and Germany are identified as the major markets in the region, followed by France and Russia. Germany and the United Kingdom collectively accounted for a 39.21% share of the overall confectionery sales volume across the region in 2023. Consumer preference for tasty and convenient indulgent snacking is identified as the key market driver in the region. In 2022, 72% of German snackers consumed candy and chocolate bars every week. In Germany, chocolate sales are anticipated to register the highest CAGR of 4.98% during the forecast period to reach a sales value of USD 13,937.01 million in 2030.

In France, the confectionery market is characterized by the large cocoa-processing and chocolate-manufacturing industry. Chocolate had a 68.68% share of the overall confectionery consumption in 2022. Consumer shift toward easy-to-prepare food is estimated to foster the demand for snack bars during the forecast period. In 2022, 44% of French consumers preferred quick food as part of at-home breakfasts.

Turkey and Spain are identified as the fastest-growing confectionery markets in Europe. The Turkish market is anticipated to expand at a CAGR of 5.69% during 2023-2030 in terms of value. The traditional popularity of sugar confectionery as gifts during religious festivals, wedding ceremonies, and celebrations fuels the market's growth in Turkey.

In Spain, chocolate and sugar confectionery are top-selling confections and collectively had a volume share of 93.674% in 2023. A healthy snacking trend is anticipated to promote the consumption of dark chocolates and sugar-free confectionery in Spain. In 2021, 55.4% of consumers preferred to spend more on healthier food options. Dark chocolate sales volume is anticipated to register a CAGR of 5.98% during the forecast

period.

Europe Confectionery Market Trends

The introduction of healthy variants like sugar-free, clean-label, natural, and organic confectionery products across the region resulted in higher sales

The consumption of confectionery products in Europe is majorly associated with celebrations, holidays, and gift-giving, leading to consistent demand throughout the year. Europeans are the world's main consumers of chocolate and increasingly demand high-quality chocolates, as well as products that hold aspects that prove their sustainable and ethical trade.

More than 80% of all chocolate confectionery sold in Germany in 2022 was made using sustainably produced cocoa. Large German retailers such as Lidl, Aldi, and REWE have committed themselves to only sell 100% sustainable cocoa chocolates.

There is a growing interest in premium and artisanal chocolates in Europe. In 2022, a quarter of chocolate buyers in the United Kingdom paid more for a luxury brand of chocolate for themselves, while 44% of consumers in the country purchased those chocolates as a gift.

In 2022, 55% of consumers in Germany preferred milk chocolate. However, dark chocolate is expected to be the fastest-growing segment. In Switzerland, 66% of consumers preferred dark chocolate. Consumption of dark chocolate is driven by consumer preferences for healthy products.

Europe Confectionery Industry Overview

The Europe Confectionery Market is moderately consolidated, with the top five companies occupying 47.99%. The major players in this market are Chocoladefabriken Lindt & Sprüngli AG, Ferrero International SA, Mars Incorporated, Mondelez International Inc. and Nestlé SA (sorted alphabetically).

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