

# Unidad de Vigilancia de Mercados

Departamento de Internacionalización. Instituto de Fomento de la Región de Murcia (marzo 2026)

## A Year of Innovation in Sugar & Gum Confectionery, 2026



Read on [mintel.com](https://www.mintel.com)

## What we have seen

### **EMEA: season and flavour**

Seasonal confectionery is surging, led by variety packs, with novelty often used as a driver to keep trial high. Flavour is shifting towards sour profiles as brands balance sweetness with excitement.

### **APAC: function and texture**

Asia leads in functional confectionery launch activity globally, keeping health-forward claims visible in the category. Soft and chewy formats remain in focus as consumers seek mood-lifting textures.

### **Americas: private label and freeze-dried formats**

Consumers prioritise value, and private-label confectionery continues to grow, driven by format and flavour innovation. Freeze-dried candy gathers momentum, with social buzz helping brands differentiate.

## Our pick of the most innovative launches in this review



### No synthetic dyes

[Funables Strawberry Fruity Snacks](#) pack real fruit purée into fat- and gluten-free bites, made without synthetic dyes, and boosted with vitamins A, C and E for a delicious, feel-good treat anytime (US).



### Help with concentration

[Kabaya Tough Gummy Pro Red Energy Drink Flavoured Gummy](#) powers you up with 185mg of caffeine and 543mg of arginine in every 130g pack. Comprises ultra-elastic, oversized gummies coated in a bold sour powder kick (Japan).



### Playful shapes

[Nice & Natural Fruit 4D Blocks Gummy](#) brings playtime to snacking with fruity, buildable blocks bursting with apple, strawberry, lemon and blueberry flavours from real fruit juice (Australia).

## Other innovative launches



### Cup noodle packaging

[Playmore Noodle Cup Pudding](#) serves up a playful mixed assortment, mimicking instant noodles in a cup-noodle-style pack for a fun, multi-texture treat. Sold exclusively at 7-Eleven (Thailand).



### Multi-level sour

[Fazer Tyrkisk Peber World's Sourest Candies Assortment](#) ignites taste buds with extra-sour, extra-hot vegan candies made with pepper extract, rated at 900,000 Scoville units for an unforgettable spicy-sour challenge (Finland).

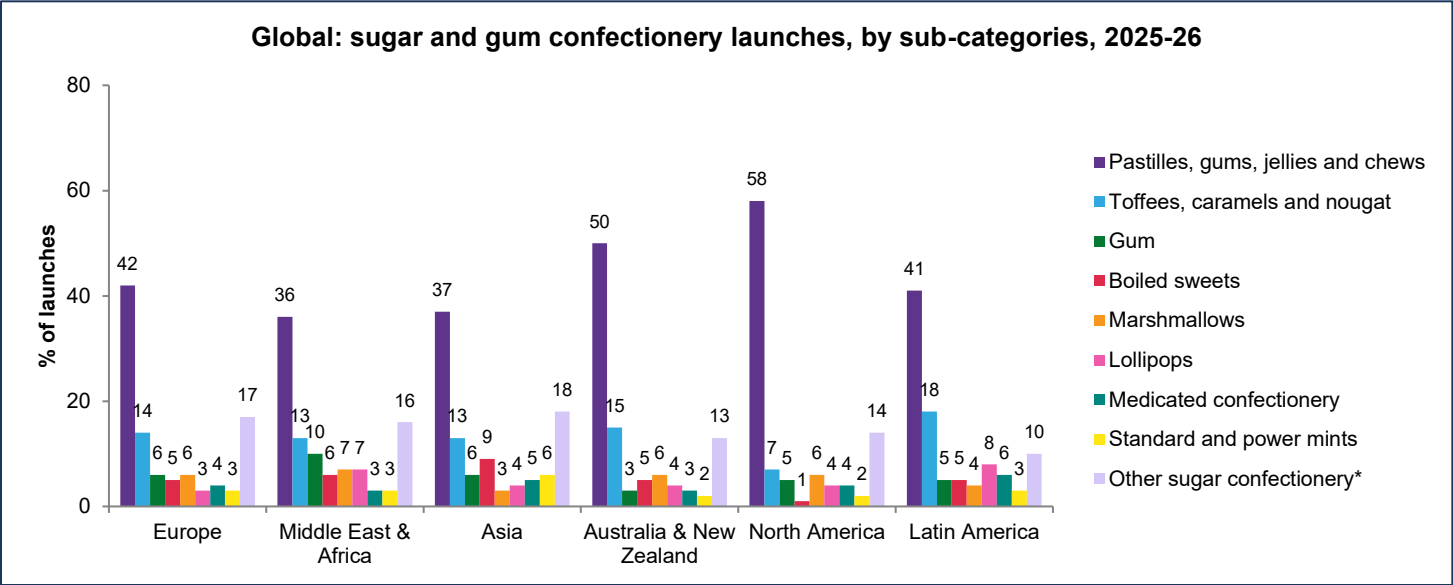


### Café collaboration

[Wrigley's Doublemint x Tim Hortons Iced Americano Coffee Flavored Hard Mint Candy](#) is a collaboration between two brands to deliver a blend of Arabica coffee and mint in every pack (China).

# Global spotlight: chewy formats take the lead in category innovation

Pastilles, gums, jellies and chews dominate the confectionery landscape, with North America leading, followed by Australia and New Zealand.



\* other sugar confectionery includes mixed assortments, liquorice, sticks, liquids and sprays

EUROPE, MIDDLE EAST & AFRICA (EMEA)

**Europe: seasonal confectionery innovation surges**

## Consumers crave novelty and themed treats

UK consumers actively seek sweets that offer fun and novelty, showing how creativity directly drives trial.

This appetite for novelty goes further - [more than half](#) of UK buyers of Halloween/Bonfire Night merchandise show interest in buying food and drink bundles themed around popular occasion-related films or TV series. Tapping into pop culture and limited-time buzz helps brands grab attention and spark instant trial.

LIMITED EDITION

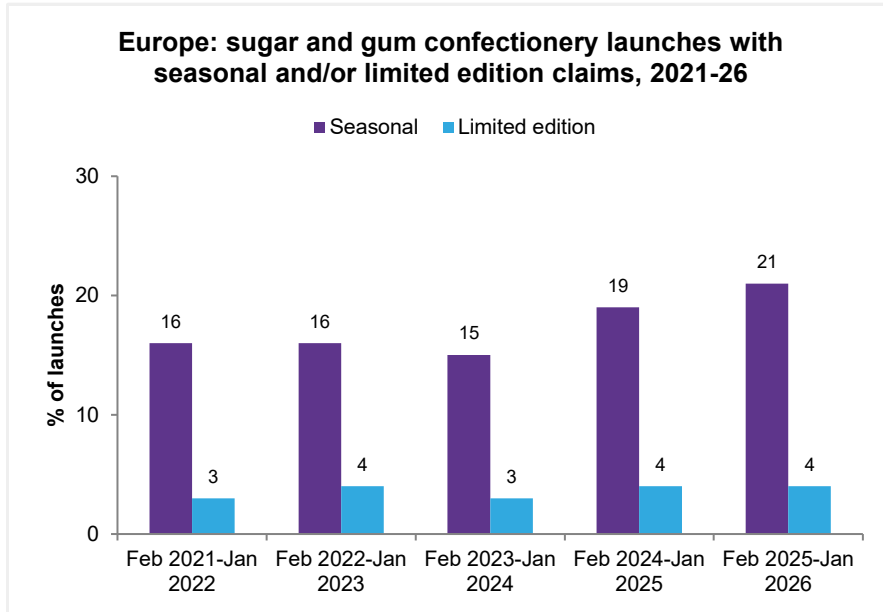
**32%**

of [UK consumers](#) would be encouraged to try new sweets with limited-edition flavours or novelty shapes

*Base: UK: 2,000 internet users aged 16+*

*Source: Mintel, April 2025*

## Brands go big on seasonal as variety packs drive the boom



Seasonal launches in Europe are gaining real momentum, spiking in the 12 months to January 2026, while limited-edition launches remain relatively unchanged. Brands are meeting consumers' desire for novelty and timely indulgence by aligning their offerings with special occasions and festive periods.

Mixed assortments stand out, with [66% of these launches](#) carrying seasonal claims in the past 12 months - well above marshmallows (32%) and other sugar confectionery (28%) - indicating a strong preference for variety and shareable formats during seasonal moments.

## Seasonal launches fuel Halloween sweet spend

With [40% of UK adults](#) buying Halloween sweets in 2025 and share rising from 3% of launches in 2021-22 to 8% in 2025-26\*, Halloween is emerging as a key seasonal growth driver.



### TV-show-themed

[Netflix Stranger Things Demogummies](#) bring spooky fun with Demogorgon-, Demobat-, Demodog- and Flayed-Rat-shaped fruit gummies, each individually wrapped for easy sharing (UK).



### Surprise figures

[Cokoc 5D Peelable Halloween Gummies with Mixed Fruit Flavour](#) deliver spooky fun with peelable pumpkin, magic hat, cat, zombie and skull shapes, made with over 50% juice for a juicy, surprise-filled treat (Poland).



### Mystery flavours

[Sainsbury's Fearsome Frogs](#) leap into fruity fun with four mystery flavours of chewy gummy goodness in every pack (UK).

\* [European launches of sugar & gum confectionery featuring the word "halloween"](#), [all European sugar & gum confectionery launches](#)

**Europe: brands diversify flavours to broaden appeal**

## Consumers seek balance through contrasting flavours

Consumers are dialing back on sweetness level, with [21% of UK adults who are infrequent sweet eaters](#) (once a week or less often) saying they avoid sweets because they taste too sweet. Blending complementary flavour profiles - such as fruity with herbal, or sweet with sour - can help brands tone down overt sweetness without compromising on enjoyment.

Out-of-home eating reinforces this shift; [39% of German consumers](#) who eat out or order takeaway/home delivery enjoy sweet-salty flavours when eating out/ordering takeaway, and 25% sweet-sour combinations, highlighting strong demand for dual-profile treats and clear opportunities for flavour innovation.

*Base: Poland: 1,000 internet users aged 16+;*

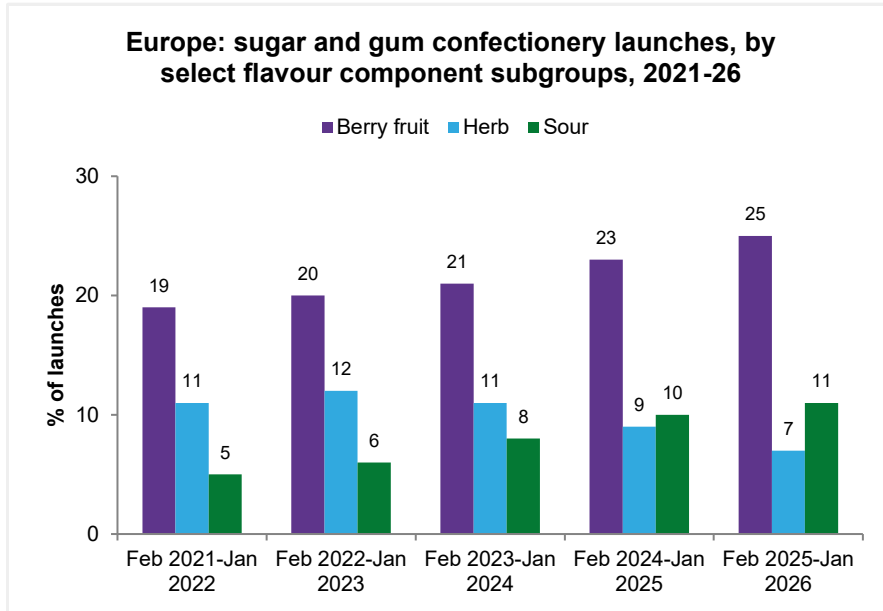
*Source: Mintel, December 2024*

DIFFERENT FLAVOURS

**77%**

of [Polish consumers](#) agree it's fun to try different flavours of sweets

## Flavour innovation shifts toward berry fruit and sour



Berry fruit flavours continue to strengthen their presence in confectionery, with strawberry alone featuring in [10% of launches](#) in the last 12 months.

Sour flavour is gaining momentum as brands place greater emphasis on sharper taste profiles, while herbal flavour continues to lose share.

These shifts suggest that brands are prioritising bold, familiar flavours over more-subtle botanical notes.

## Sour flavours step in as sweetness evolves

Brands are leveraging sour profiles to deliver bold, attention-grabbing taste experiences.



### High-fibre sour jellies

[Double 'D' Savvy Sweets Sour Bears Raspberry & Blueberry Flavoured Jellies](#) deliver a sour-fruity profile formulated with plant-based and gluten-free ingredients. With prebiotic fibre and lower sugar, it offers a healthier sweet choice (UK).



### Sour noodle candy

[JohnnyBee Sour Noodle Cup](#) brings a fun burst of tutti-frutti flavour with sour gummy noodles, zesty gel candy, popping candy and a candy stick for an exciting mix-and-taste experience (Slovenia).



### Sour animal gummies

[Sainsbury's Sour Bears](#) are bursting with fruity flavour and a zingy sour sugar coating for a fun, chewy treat. Made with natural flavourings and colourings to satisfy any sweet craving (UK).

## **The Middle East & Africa (MEA)**

## Bold launches fuel flavour exploration

[67%](#) of Saudi consumers seek new foods and flavours all or most of the time, suggesting strong potential for bold profiles like tangy, sour and spicy.



### Tangy

[Rowntree's Tangy Jelly Tots](#) burst with fruity flavour in every sour-coated jelly. Made with fruit juice, they are vegan-friendly and free from artificial colours, flavours and preservatives for a fun anytime treat (Ghana).



### Spicy

[Big Hmto Spicy Lollipop with Double Bubble Gum Filling](#) delivers a bold, spicy hit with a burst of fruity gum inside, all in a 150g pack free from GMOs - partially hydrogenated oils, lard and their derivatives (Egypt).



### Sour

[Eviza Jojo Jelly Cola Sour Strips](#) deliver a bold cola kick in every strip. They are suitable for vegans, and made without GMOs, lard or animal-derived ingredients (Oman).

## Brand renovation/innovation: Pimp My Party launches adult flavours

Pimp My Party has introduced a range of cocktail-inspired gummies that transform adult cocktail flavours into chewy, indulgent sweets without the alcohol. The lineup includes [Brandy & Cola](#), [Pina Colada](#), [Strawberry Daiquiri](#) and [Passion Fruit Martini](#) gummies, made with natural colours and flavours, and crafted to taste like their cocktail inspiration.

MEA consumers increasingly [seek everyday indulgence](#), and Pimp My Party delivers this with bold, alcohol-free-cocktail-inspired gummies that pack sophistication, fun and full-on flavour into every bite.



[Brandy and Cola Cocktail Gummies](#)

# ASIA PACIFIC (APAC)

**Asia: brands drive innovation in functional confectionery**

## Consumers turn to candy for wellness

FUNCTIONAL CANDY

**23%**

of [Chinese consumers](#) eat  
functional candy at least once a  
week

Health now shapes how consumers indulge. Among Chinese consumers who are cutting back on packaged sugar or chocolate confectionery, [50%](#) cite weight gain concerns, and [46%](#) worry about chronic illness.

Functional benefits can help sugar confectionery overcome these barriers, especially given that [52%](#) already buy functional candy for everyday solo consumption. This creates space for brands to position candy as a small wellness boost in daily routines.

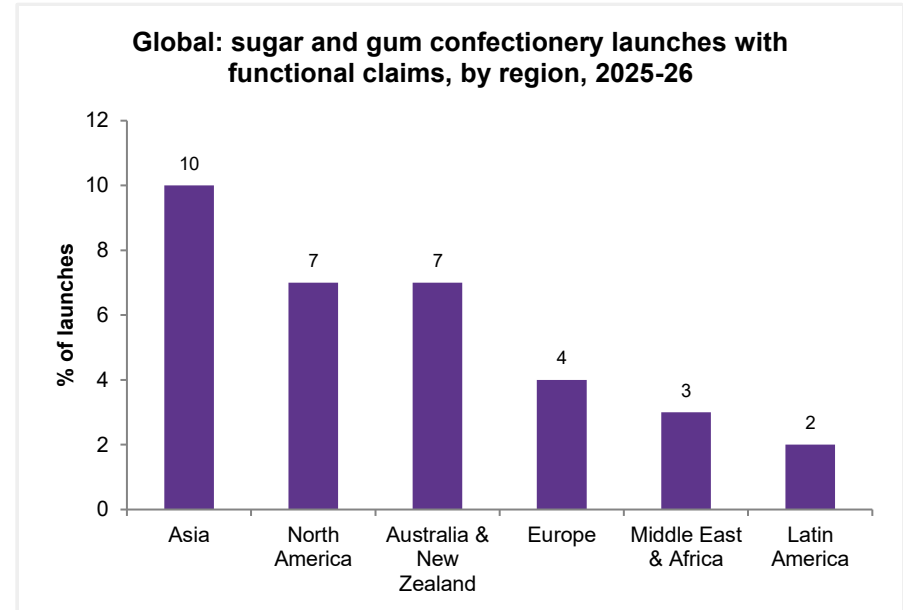
*Base: China: 3,000 internet users aged 18-59*

*Source: Mintel, April 2025*

## Asia leads global uptake of functional claims

Asian brands are adding health benefits to traditional candies to meet 'better-for-you' demand. Despite a [five-year decline](#) in use in sugar confectionery and gum in Asia, functional claims remain relatively prevalent compared to other regions, reflecting active, locally aligned innovation.

Within Asia, Japan accounts for the largest [share of launches with functional claims](#) (29%), followed by China (23%) and India (11%), showing where activity is most concentrated. Asia's ability to merge wellness benefits with enjoyable taste keeps the region at the forefront of functional confectionery.



## Brands across Asia reinvent sweets with functional benefits

Brands are rolling out launches with on-pack health benefits - including probiotic, low-GI and CoQ10 - reflecting consumers' rising appetite for better-for-you indulgence.



### Probiotic

[Fiboo Lime Green Tea Flavoured Breath Freshening Probiotic Gummy](#) delivers a refreshing lime green tea taste, providing 5 billion unactivated probiotic cells per gummy for clean, fresh breath and daily balance (China).



### CoQ10

[Matsukiyo Beau Dolce Lemon Flavour Tablets with Active Form of CoQ10](#) deliver a refreshing burst of Setouchi lemon, supporting beauty from within with active CoQ10 in every treat-worthy bite (Japan).



### Low glycemic index (GI)

[Metro Mai Zhen Xuan Low GI High Protein Nut Crisp](#) delivers a satisfying crunch, with over 52% nuts, seeds and dried fruits, offering a low GI value of 42 plus high protein, fibre and added prebiotics in every 38kcal unit (China).

**Asia: brands expand launches with softer texture**

## Texture turns sweets into an emotional indulgence

SOFT SWEETS

29%

of [Japanese consumers](#) prefer sweet snacks with a soft texture

Texture has become a defining marker of enjoyment in confectionery, shaping how consumers judge quality and choose between products. Soft confectionery is increasingly sought in Japan for its ability to deliver a comforting and pleasurable eating experience.

In China, [78%](#) of packaged snacks buyers prioritise texture and taste when buying, while [about half](#) of adults look for sweet snacks that bring a strong sense of happiness. This shows that texture does more than just please the palate - it unlocks specific emotions, turning sweet snacks into small, mood-lifting moments.

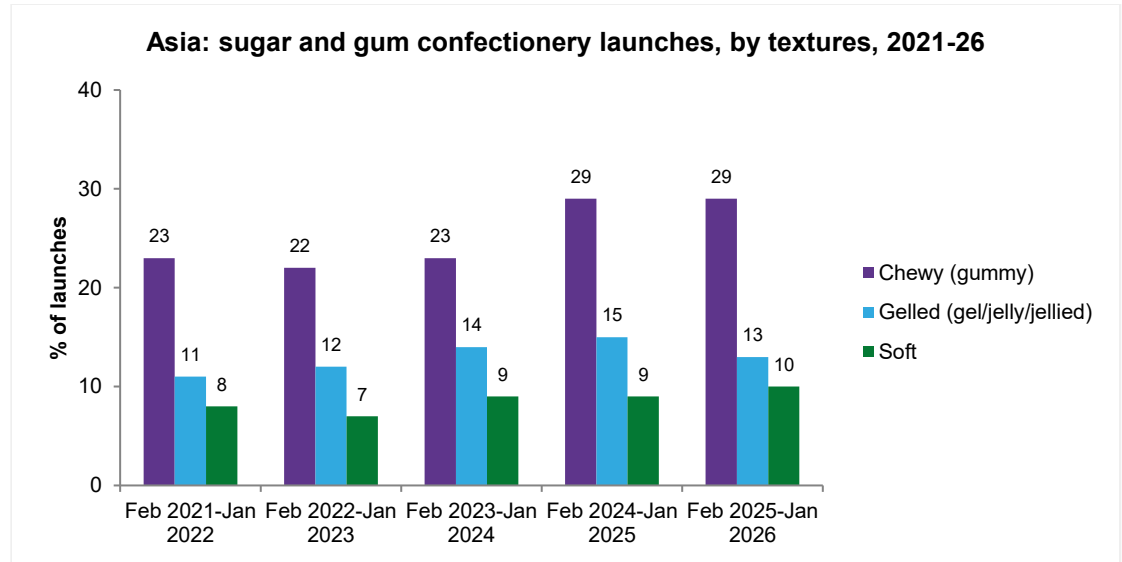
*Base: Japan: 2,000 internet users aged 18+*

*Source: Mintel, December 2024*

## Brands turn their attention to softer candies

Chewy texture leads confectionery launches in the 12 months to January 2026, followed by gelled and soft textures. The latter of these holds a smaller share, but has continued to trend upward over the past four years.

Brands continue to innovate in easy-to-chew formats, aligning with consumer demand for softer textures.



## Brands use texture to elevate experience

Brands are leaning into soft-textured confectionery to elevate indulgence.



**Cocoa-filled milk treats**  
[Kinder Milkredible Cocoa Flavoured Sandwich Milk Candy](#) delights with soft, chewy bites filled with rich cocoa cream in convenient individually wrapped pieces, perfect for anytime indulgence (China).



**Vitamin C fruit gummies**  
[Savoria Fox's Gummy Candy Emoti Pops Love & Angry Soft Candy](#) delivers colourful lychee, wildberry, and orange gummies made with fruit extract and vitamin C for a fun, flavour-packed treat (Indonesia).



**Squeezzy duck marshmallow**  
[Playmore Squeezzy Duck Marshmallow](#) brings adorable fun to every bite with its soft, squeezzy, duck-shaped marshmallow, available exclusively at 7-Eleven (Thailand).

## Australia & New Zealand

## Better-for-you innovation takes centre-stage

Brands are introducing low-calorie, clean-label and vegan-friendly products to appeal to the [85%](#) of Australians who say eating healthily boosts their happiness.



### Low-calorie

[Koochi Koo Watermelon Lollipops](#) come individually wrapped in a bag, are naturally sweetened with tapioca, fortified with vitamin C, and formulated with zero sugar, for a lower-calorie treat (Australia).



### No artificial colour

[Sweet Sensations Fudgy Good Salted Caramel Brownie Fudge](#) comprises rich Belgian chocolate caramel fudge with a precise balance of sweetness and salt. Made with no artificial colours or flavours, and suitable for vegetarians (Australia).



### Vegan-friendly

[Sugarfina Tropical Treats Candy Bento Box](#) contains passion fruit and pink pineapple gummies suitable for vegans, all packed in a playful bento-style lunchbox (Australia).

# THE AMERICAS

**North America: private-label confectionery continues to rise**

## Consumers choose private label for affordable indulgence

PRIVATE LABEL'S APPEAL

**72%**

of [US food and drink shoppers](#)  
agree that store brands help save  
money without sacrificing quality

Rising costs directly impact consumers' purchasing decisions, with [more than half](#) of Canadian chocolate and candy eaters cutting back on these products due to higher prices.

At the same time, consumers seek to indulge while staying budget-conscious, turning to private label as a way to save money without sacrificing quality.

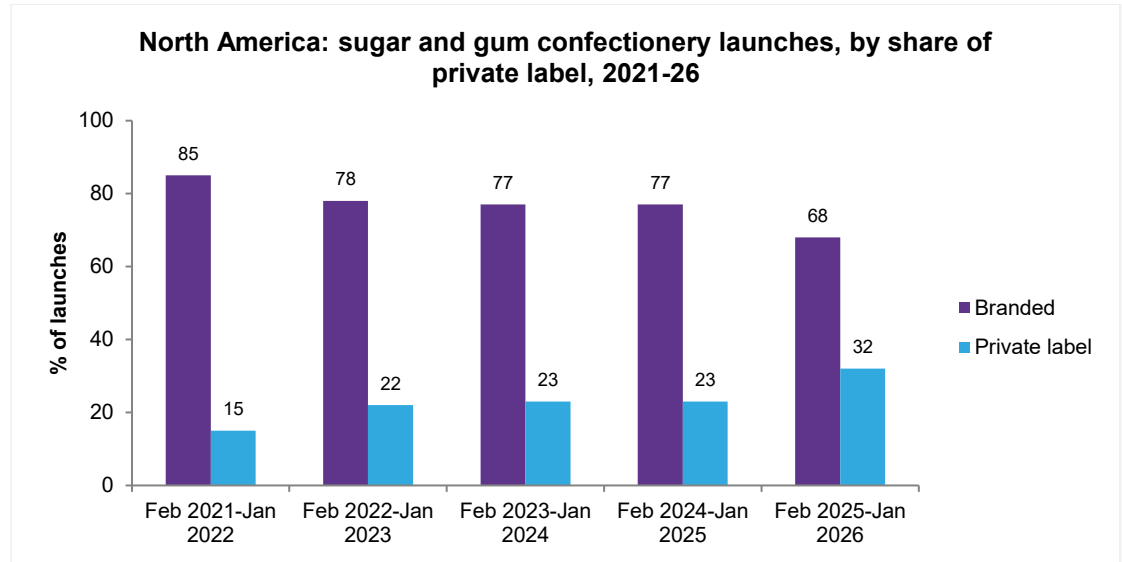
*Base: US: 1,843 internet users aged 18+ who are responsible for food and drink shopping in household*

*Source: Mintel, February 2025*

## Private label drives confectionery launch activity

Rising prices reshape the confectionery landscape. Private label launch activity has risen steadily over the past five years as retailers responded to price-sensitive shoppers.

By investing in value-driven innovation - including premium lines, new flavours, varied formats and seasonal offerings - private label can gain visibility and share across the confectionery aisle.



# Private label innovates through format, flavour and seasonality

Private label differentiates by leveraging format innovation, distinctive flavour pairings, and limited-edition offerings.



## Seasonal format

[Nice! Gummy Sweet Potato Peelable Candy](#) brings a seasonal twist, featuring sweet potato as the quintessential autumn flavour in a peelable format for Fall 2025 (US).



## Limited-edition flavour

[Giant Eagle Key Lime & Creamsicle Taffy Mix](#) delivers a burst of limited-edition key lime and orange creamsicle in soft and chewy, bite-sized pieces crafted 'the traditional way' (US).



## Sweet heat fusion

[Trader Joe's Hot Honey Fudge](#) combines the sweet and spicy notes of hot honey with rich, buttery fudge for a balanced flavour experience. This treat comes in bite-sized pieces for controlled indulgence (US).

**North America: freeze-dried confectionery sees a rise in launch share**

## Freeze-dried candy sparks a new texture trend

FREEZE DRIED

22%

of [US category buyers](#) are interested in freeze-dried non-chocolate candy

Freeze-dried candy is gaining traction in North America as consumers seek out novel textures and multisensory twists. About a fifth of US consumers show interest in such formats, with [social buzz and short viral videos](#) accelerating discovery and trial by spotlighting their dramatic 'puff-up' effect and ultra-crunchy bite.

In Canada, [21%](#) of chocolate or candy eaters are interested in new products with unique textures, signaling clear space for texture-led formats.

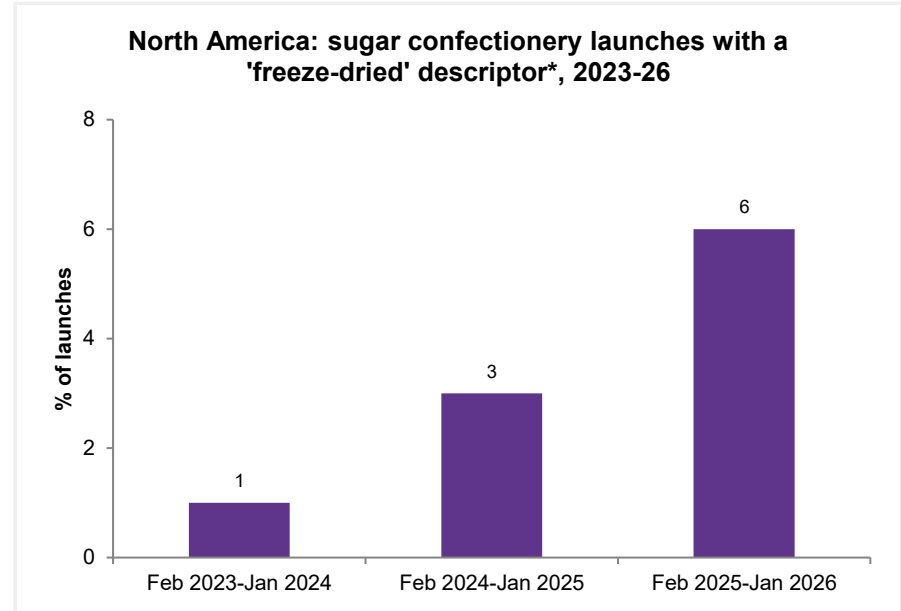
*Base: US: 1,721 internet users aged 18+ who have purchased non-chocolate candy in the past three months*

*Source: Mintel, May 2024*

## Freeze-dried claims gain momentum in texture-led innovation

What began as limited experimentation has clearly gathered momentum, with more brands using freeze-drying to give classic candies a lighter crunch and a fresher twist.

Freeze-dried confectionery in North America has risen steadily, as brands lean more heavily into texture-driven innovation. This continued uptick shows brands' confidence in adopting sensory novelty to stand out.



*Base: \* includes the term ['freeze dried'](#) with word variants in the product description, as a % of [total launches in other sugar confectionery, pastilles, gums, jellies and chews, boiled sweets, toffees, caramels and nougat](#)*

*Source: Mintel GNPD, February 2023-January 2026*

# Freeze-dried formats drive innovation

Brands are leveraging texture, natural fruit content and clean-label claims in freeze-dried confectionery.



## Crispy texture

[Spree Freeze Dried Candy](#) comprise sweet, crispy, crunchy bites in a resealable 4oz pack with just 110 calories per serving, offering a fun burst of varied flavours in every handful (US).



## 100% fruit

[Ohme! Freeze-Dried Blueberry Yogurt Crunch](#) brings together real Canadian Greek yogurt and 100% freeze-dried blueberries for a light, melt-in-the-mouth crunch, with natural sweetness and no added sugar (Canada).



## No artificial flavours

[Frizzle Krackles Coconut Lime Freeze Dried Candy](#) delivers a bright burst of tropical coconut and zesty lime in a light, crunchy bite made without artificial dyes, gluten or GMOs, creating a fun new snacking experience (US).

**Latin America**

# Latin American confectionery embraces chili flavours

Chili flavours remain a go-to inspiration for bold innovation in Latin American confectionery. After holding steady in previous years, chili flavours see periodic upticks as brands experiment with spicy-sweet profiles to add excitement and regional character to their products.

Although still a niche choice, chili remains a reliable flavour cue revisited by brands to create bold, standout innovations rooted in local taste preferences.



## Sweet and spicy duo

Brands are blending vibrant fruit flavours with chili heat to create exciting sweet-and-spicy experiences that resonate with adventurous consumers.



**Coated in hot sauce**  
[Chilim Balam Apple and Watermelon Flavored Gummies with Chili and Hot Sauce](#) are bursting with tangy apple- and watermelon-shaped gummies coated in Chilim Balam's original chamoy sauce for an irresistible sweet-heat adventure (Mexico).



**Comes with a chili dip**  
[Colombina Bon Bon Bum Passionfruit Flavored Gum and Tajin Chili and Lime Filled Lollipop](#) delivers a sweet-zesty hit, each packed with its own Tajín chili-lime powder for the ultimate combo. Also comes in a [watermelon](#) variant (Colombia).



**Mix of sweet, spicy and salty**  
[Huer Sweet n' Spicy Watermelon Flavored Gummy Rings with Chamoy Sauce Coating](#) comprise juicy watermelon gummies coated in bold chamoy for a sweet, spicy and salty kick in every soft, chewy bite (Mexico).