
Sugar Free Confectionery in Western Europe— Market Developments and Trends

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Today, growth in the European confectionery markets comes almost exclusively through new and creative products. Sugar free confectionery has contributed to the market success in this category.

CONSUMER MOTIVATION FOR THE USE OF SUCH PRODUCTS

In Europe the confectionery consumption by consumers is greatly influenced by changing food consumption patterns. Consumers are increasingly aware of the link between diet and health. Their dietary behavior can be described as a combination among three nutritional factors: enjoyment, health and convenience.

With regard to the confectionery category the orientation towards health has led to a growing demand for sugar free confections, implying tooth-friendliness and calorie-reduction. The enjoyment dimension results in the demand for good tasting high quality products, but also in the desire for product variation. Sugar alcohols, particularly those of

the second generation, have contributed to the successful market development of sugar free confectionery as these ingredients guarantee the production of sugar free products comparable in taste with those containing sugar.

In many European countries, sales of traditional sugar confectionery are stagnating. Therefore, in mature confectionery categories, product innovation is the key factor in order to appeal to a consumer who demands product variation. Sugar free confectionery meet this innovative challenge. New and creative product concepts in this segment have influenced the sugar free market success and even have set new impulses within the whole confectionery category.

Confectionery sales in Europe are determined by a third dimension which is the trend to more convenience. In line with the increasing mobility of consumers, the demand for small convenient packages which are easily portable has increased. In some European countries environmental awareness of

consumers is very high. Therefore, consumers ask for less packaging and more environment-friendly packages.

REGULATORY APPROVAL OF INGREDIENTS

In most European countries, sugar free bulk sweeteners and intense sweeteners were approved as main ingredients of sugar free confectionery in the eighties (Figure 1).

Through the early approval of sugar free bulk sweeteners, in particular those of the second generation, it was possible to formulate sugar free products comparable in taste and quality with those containing sugar. The availability of these modern sugar substitutes had a positive influence on the sugar free market development in Europe. In contrast, in the U.S. the use of high-intensity sweeteners for the production of sugar free confections was only approved in 1993. Since then the sugar free confectionery market shows progressive growth and might go a long way. This situation gives reason to assume that the successful market development of sugar free confectionery in Europe will be soon reflected by a similar development in the U.S.

CHEWING GUM MARKET

The confectionery category with the highest sugar free market penetration is chewing gum. The country comparison (Figure 2) shows that in almost all European countries chewing gum sales are dominated by sugar free gums. In Finland, Switzerland and Spain the sugar free penetration is already near or even higher than 80 percent, followed by the German market with 70 percent and the U.K. with 65 percent. In France and Italy about 50 percent of all chewing gum sales are currently sugar free. Turning to the growth rate for sugar free chewing gum in major Western European