

Confectionery



KitKat® is the fastest growing top 5 singles brand +16.5% YoY*



KitKat® is worth £280m +8.5% YoY**



Have a **break**, have a KitKat®

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*Circana All Outlets and KWP Discounters, Total Singles, Value Sales year on year, 52 w/e 28th December 2024

**Circana All Outlets and KWP Discounters, CBB's, Singles and Multipacks, Value Sales year on year 52 w/e 28th December 2024

KitKat breaks new ground in 2025

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Since its debut in 1935, KitKat has been on a mission to provide the nation with better breaks, constantly evolving to meet the ever-changing needs of consumers.

Breaks for Good

As well as delivering delicious chocolate, KitKat is continuing its sustainability journey. Using cocoa from Nestlé's Income Accelerator programme, the brand aims to help close the living income gap of cocoa-farming families and reduce child labour risk. After a successful test with 10,000 cocoa farming families, 2024 saw 30,000 families enrol in the programme across Côte d'Ivoire and Ghana.

The programme incentivises and supports cocoa-farming families to enrol their children in school, implement good agricultural practices, engage in agroforestry activities, and diversify their incomes. In 2024, to raise awareness, KitKat ran the 'Breaks for Good' campaign, highlighting the work of the Income Accelerator Programme with on-pack messaging, print, online and social advertising.

Break Better

Building on decades of the iconic tagline 'Have a Break, Have a KitKat', the global brand continues to put significant investment behind its latest ad campaign across the UK – on TV, video on demand, out-of-home, social media and in stores across the UK & Ireland. Set to Queen's hit 'I Want to Break Free', the new work recognises that, in a world that demands our constant attention, it is difficult to switch off and have a proper break.

Adapted for different countries across the globe, the brand's ad wants to inspire people to take better-quality breaks, without interruption.



“ Since 1935, KitKat has been on a mission to provide the nation with better breaks, constantly evolving to the meet the ever-changing needs of consumers”

Standing out on-shelf

In today's competitive marketplace, standing out is essential. Nestlé is always exploring innovative ways to enhance product visibility. One strategy involves flipping sharing bars to be displayed in a portrait position, which shoppers will see on the new KitKat sharing bar range. This eye-catching design highlights the iconic KitKat branding and ensures that flavour and product differentiation shine through.

To further support retailers, Nestlé offers a variety of point-of-sale materials and shopper marketing plans to engage consumers as they shop. Look out for increased visibility for KitKat, Aero and Rowntree's through main aisle activations and off-shelf displays, where compliant.

Keeping it fresh

In 2024, the brand launched a wave of new and exciting products, including KitKat four-finger White, KitKat Chunky Double Choc, KitKat two-finger Cookies & Cream, and KitKat two-finger White. As it looks ahead to 2025, the KitKat team is ready to keep the momentum going with substantial media investments to support its 'Break Better' campaign and a line-up of innovative product launches. Starting 2025 off strong, the unmissable KitKat sharing bars begin roll-out this month, along with KitKat four-finger Hazelnut and KitKat two-finger Nescafé Mocha.



STOCK

THE DELICIOUS

NEW

WAY TO break



Supported with a
£10M+
media
campaign

92%
of consumers
would buy*



Now in sharing bars.


For illustrative purposes only. ®Reg Trademark of Société des Produits Nestlé S.A.
*Ipsos CPT test | KitKat® Blocks UK FR | April 2024. Salted Caramel and Double Chocolate variants also available in price marked packs. Retail pricing is at the sole discretion of the retailer.

Have a break, have a KitKat®

Analysis

Innovation and staying power

Appeal to a wide variety of different consumer need states is at the heart of confectionery's ongoing resilience. And innovation is key to growth

 The familiar theme of permissible indulgence continues to resonate strongly in the UK confectionery category. In a world where economic and global stress increasingly seem to reverberate, confectionery plays into the concept of self-treating and having small moments of joy.

While older shoppers currently seek nostalgia in their sweet treats, younger consumers – spurred on by social media – are constantly looking for new flavours and textures. So, suppliers are constantly on their toes when it comes to innovation, and trends from across the Atlantic – one of the more recent being freeze-dried confectionery – continue to inspire NPD in the UK. However, it is the category's ability to play into a variety of need states – from mood elevation to sharing and gifting – that really lies at the heart of its ongoing success. So,

how are suppliers playing into these trends and what advice do they have for retailers to stay ahead of the game when it comes to sweet treats?

Over the past year, the confectionery category has shown remarkable resilience, growing by 7.9%¹, although unit sales have seen a slight dip of 1.5%² due to price increases across the whole category because of record cocoa prices in the market, says Nestlé. “We’ve seen a surge in ‘break time’ occasions, with food-to-go missions rising by 15.49%³,” it notes. “Chocolate singles, and especially duos are leading the charge – growing by an impressive 20.3%⁴.”

“Additionally, with consumers enjoying more time at home with family and friends, sharing formats are thriving. Sharing bags and chocolate blocks have seen growth rates of 8.7% and 10.7%, respectively⁵.”

Total confectionery saw value sales grow at +8.6%, with Mars Wrigley growth just behind the market at +7.7%⁶, says Lauren George, external communications manager at the company. “We did, however, outperform the market in choc bite-size, with a value increase of 11.2% against a total confectionery increase of 8.6%⁷, as well as seasons & gifting and gum, while performance for total chocolate was in line with the market.”

In 2024, shoppers showed they are still looking for treats, despite economic considerations remaining on their agendas even while inflation eases, says Susan Nash, trade communications manager at Mondelez International. “Brands continue to stand out in confectionery, relative to other categories, with brand growth in gifting and sharing stronger than own-label⁸,”



she says. “Consumers have also shown they are excited by innovation within the category and continue to engage with it, so retailers should ensure they refresh their range regularly with the biggest and most relevant launches.”

“The gifting and sharing segment is seeing strong growth of 11.2%⁹. Elsewhere, the duos format is growing by 20.6%¹⁰ in the category, she adds, with research¹¹ showing consumers are not only choosing duos for themselves but are also sharing them, meaning they are an important part of any retailer’s range alongside singles.

As for sugar confectionery, the market is in growth¹² and currently represents 24% of the total confectionery market¹³, she says. “Within this, we’ve seen a rise in demand for the sour candy segment in particular¹⁴.”

Within the sweets sector, the market is performing at +5% (+£77m) in a £1.6bn category¹⁵. Some of this will be inflationary-led but there are some key drivers behind this growth, says Lee Fretwell, head of UK commercial and marketing at BIP Candy & Toy UK. Sharing bags are continuing to perform strongly as kids move more towards a softer chew vs your more traditional harder gummies, he notes.

The economic challenges of the past few years have started to impact the sugar confectionery category, which saw growth slowing down, up just 4% in value¹⁶, says Bazooka Candy Brands International (BCBI). “Bazooka Candy Brands has continued to outperform the market and deliver strong growth in value at 19% and unit growth at 9%¹⁷,” it says.

According to Kathryn Hague, head

Contents

Nestlé UK	2
Breaking new ground in 2025 with an iconic brand	
Bazooka Candy Brands Int’l	13
Innovating with sweet and sour combinations	
BIP Candy & Toy UK	14
Bringing excitement to retail with its eclectic range	
Ferrero	16
Walker’s Nonsuch	17
Marking over 130 years of toffee making, with flavours for all palates	
Grenade	18
Meeting consumers’ desire for tasty healthier options	
Kervan Gida – Bebeto	20
Revealing how innovation has helped to skyrocket its sales	
Mars Wrigley UK	22
Taking a fruity approach to its gum confectionery	
Mondelēz International	24
Catering to all shoppers with varied formats and flavours	
Newbridge Confectionery – Toxic Waste	26
Bursting into 2025 with three new candy lines	
pladis	28
Storming the snacking scene with its latest offerings	
Vidal Candies	30
Building on key innovations across retail and impulse	
World of Sweets	32
Energising the confectionery market with its NPД	
Zertus UK & Ireland – Baileys Chocolate	34
Driving shoppers’ desire for premium indulgence	

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Analysis

of marketing at World of Sweets, primary drivers influencing the sugar confectionery market include: nostalgia – with consumers rediscovering old-school favourites like Lemon Sherbets, Strawberry Bon Bons and Barley Sugars; a rise in market share for sugar confectionery– driven by value-driven brands as economic pressures steer consumers towards affordable yet high-quality options; accessible alternatives in the form of cost-effective substitutes for chocolates; a late Easter sales window in 2025, extending the self-treating season; and pick & mix growth – which is benefiting from its exemption from HFSS regulations.

When it comes to chocolate, sales of selection boxes and multipacks have increased due to consumers looking to bring together families and friends and share chocolates, says Alison Robson, marketing manager for Baileys Chocolate, which launched a Christmas box of Assorted Truffles last year. This product draws upon the consumer desire to try new flavours as well as engaging the gifting and sharing market,” she says. “Furthermore, the cost-of-living crisis has changed consumer habits and, in response to this, Baileys Chocolate has continued to position itself as affordable luxury,” she notes. “Shoppers want to feel they can be indulgent and decadent, without breaking the bank and the chocolate confectionery category is very well placed to provide this experience.”

As for the toffee category, Walker’s Nonsuch national sales manager Alan Staniford says it has seen “a remarkable resurgence”, driven by nostalgia, self-treating and social sharing trends. “Consumers are increasingly seeking the comforting traditional flavours of toffee, especially during uncertain times,” he says. “Nostalgia plays a crucial role, particularly among older consumers, but younger generations are also drawn to toffee’s classic indulgence. Additionally, the rise of self-treating, driven by rising living costs, aligns perfectly with toffee, as it offers an affordable yet premium treat that provides comfort without the high price tag of other luxury sweets.”

Sweet news for all seasons

Seasonality plays a key role, particularly during gifting occasions like Christmas, Easter, and Eid, adds Staniford. “These celebrations provide



the perfect opportunity for customers to give meaningful gifts, and our toffees are a natural fit for these moments. In response, we’ve introduced new 350g toffee gift boxes in three varieties: Assorted Toffees and Chocolate Éclairs, Salted Caramel, and Lovely Liquorice.”

Seasonality is hugely important to the confectionery category, says Mars Wrigley’s George. “Snacking is worth £4bn over the spring season and has the second highest penetration peak of

the year¹⁸, making it a critical period as it covers multiple different seasonal and cultural moments,” she says. “During spring, confectionery is the biggest snacking category with 94% of the population shopping the category¹⁹. Additionally, Easter remains a key occasion for chocolate confectionery and is the biggest growth driver across the spring season. We have seen a 14% increase in spend per trip during the Easter period specifically, and a 6%

Keeping health in mind



Consumers continue to look for healthier alternatives, that don't compromise on taste which is shown in the growth of the protein bar category to £150.4m (+8%)ⁱ, says Rachel Austerberry, UK sales director at Grenade. "This is also up 42% vs 2022 and has doubled since 2019ⁱⁱ, which shows the desire for low-sugar protein bars is getting bigger each year," she says.

"Protein bars provide health-conscious consumers the opportunity to enjoy a sweet, chocolate treat and benefit from the additional protein each bar provides. This benefit, along with the striking similarity in taste between protein bars and typical chocolate singles, has blurred the lines between confectionery."

Baileys Chocolate's Robson notes that chocolate bars with added cereal, fruit or nuts alone generate sales of over £67mⁱⁱⁱ in the UK, and this is continuing to

grow, which she says could be down to the changing regulations on HFSS products. Brands are keen to develop their ranges to include products that are HFSS-compliant and are higher in protein and fibre," she notes.

In addition, 70% of consumers are looking for unique, exciting and delicious chocolate offerings with multiple flavours and textures^{iv}, she says. In response, Baileys Chocolate has launched the Baileys Caramelised Nut Mix. "This fits into a range of treating occasions, from daytime snacks and self-treating to festive celebrations."

With 60% of UK consumers^v expressing interest in sugar reduction technologies, there is significant potential for innovation in the healthier products sector, agrees World of Sweets' Hague. "Almost 50% of people have tried a new low/no/reduced sugar product^{vi}. And almost two-thirds of those limiting or reducing their sugar

intake list biscuits, chocolate or desserts as foods in which they would be most open to trying a reduced-sugar version^{vii}," she notes. "The demand for healthier confectionery options is continuing to grow with attributes like reduced sugar, natural ingredients, plant-based formulations and functional benefits."

To address this, the company is launching no-sugar novelty lines under licences such as SpongeBob and Paw Patrol in 2025, as well as the Bonds Trail Mix in three flavours inspired by sweets – Banoffee Pie, Chocolate Orange and Sticky Toffee Pudding.

Lower-calorie and portion-controlled options continue to be important in the category, says Mondelez's Nash. The company has a longstanding 250kcal cap on single-serve chocolate bars, 100kcal cap on products typically bought for children by parents (such as Freddo, Chomp or Curly Wurly)

and a 200kcal cap on Cadbury multipacks. "We are also a member of Be Treatwise, which provides tips and advice to help consumers snack more mindfully and in moderation."

Although BIP's Fretwell believes there is demand for reduced-sugar and healthier products in adults, a lot of what it sells is for children. "We are what we are in some respects, and despite bringing to market some healthier alternatives, consumers seem to choose more self-treating confectionery at the point of purchase," he says. "It can be very confusing to understand what is sugar-free, less sugar or – even to adults – normal sugar, with all the various claims on-pack. So, imagine how a 10-year-old feels when they have a bag of sweets in their hand. Our role as manufacturers and distributors is to educate as best as we can on-pack to make it a simpler shopper journey."

rise in trips compared to the rest of the year²⁰, demonstrating the nation's continued love for confectionery during this occasion.

"In 2024, one in three confectionery shoppers selected Mars Wrigley products at Easter²¹, highlighting the important role our brands play in driving sales during the occasion."

Seasons such as Easter and Christmas are vital for confectionery brands, and it is important to be highly responsive

to consumer trends to maximise sales, says Baileys Chocolate's Robson. "This includes trends within flavours and ingredients, and changes in consumers' eating habits. The mint chocolate market size is projected to reach multimillion US\$ by 2031²² and we've seen this trend work its way to the UK, with key players enjoying growth in mint chocolate flavours.

"This Easter will see the launch of the Baileys Mint Chocolate Easter

Egg which engages the adult Easter market, through the popularity of Mint Chocolate flavour as well as piquing customers' interests with a new, visually appealing product."

World of Sweets' Hague agrees that seasonality remains a critical driver for confectionery sales, with key occasions including Easter and Christmas presenting significant opportunities to engage shoppers and boost revenue. Easter continues to be a major event for

Analysis

confectionery, with 70% of shoppers planning to participate in Easter-related categories²³, she notes. “The later date in 2025 offers an extended sales window, with three additional weeks to capitalise on: self-treating and impulse buys, which are expected to drive unit sales, particularly for impulse and lower-value items, as well as promotions, late-season spend and home-centred celebrations.

“With 63% of shoppers seeking promotions²⁴, strong value communication and loyalty schemes are essential, she adds. “Maintaining core price points of £1-£2 and £3-£4 will cater to varied shopper needs.”

And she points out that nearly half of Easter sales (46.5%)²⁵ occur in the week leading up to the holiday, emphasising the need to ensure availability and visibility of products during this crucial period.

Easter and Christmas are the biggest occasions in the retail calendar for the category, but other seasonal spikes such as Valentine’s Day, Mothers’ Day, Fathers’ Day, Diwali and Halloween can also be maximised in-store to unlock more sales, says Mondelez’s Nash. “Front of retailers’ minds at this time of year, of course, is Easter,” she notes.

An untapped opportunity for sugar confectionery is capturing a higher share of seasonal sales which has been dominated by chocolate, says BCBI. “In 2025 we aim to create products to take advantage of these opportunities. We have seen from our business in the US how successful we can be with ... seasonal products,” it notes.

“Protein bars are often sought after in-between the typical seasonal spikes for confectionery,” says Grenade’s Austerberry. “When consumers are feeling more health-conscious after an excessive festive period, protein bars provide the healthier alternative to help consumers get back on track in January. After Easter is over, with consumers’ holidays approaching and warmer weather, they turn to healthier alternatives, including protein bars, to support a more conscious diet without having to give up the chocolate. This continues through the summer until late September when protein bars are in demand before consumers return to more comforting options in the winter. Retailers should consider increasing their range and availability during these busy periods and consider

Innovation continues to play on fresh flavours and textures

“The world of candy is changing rapidly,” says BIP’s Fretwell. “We are seeing freeze-dried candy appear everywhere. Is it a fad? Who knows! At BIP Candy UK we have recently launched a new range of Mouthglower products to hit the ‘sour spot’ children demand.”

World of Sweets’ Hague points to three key flavour and texture themes: mashups, combining different combinations and formats; nostalgia, with the appearance of retro sweets; and super-sour flavours. Products catering to these trends in its portfolio include Sweet Vibes Mallow Dunkz, featuring soft marshmallows dipped in chocolate and coated with a crispie shell; Candy Realms Candy Whistles and Lipsticks, launching this year; and Warheads, super-sour popping candy, in sour green apple, sour blue raspberry and sour watermelon.

Bazooka Candy Brands (BCBI) points to the continued growth of Blue Raspberry as a

popular flavour within sugar confectionery, driven by sweet review videos on social media platforms. Sour and fruity flavours are also gaining popularity among younger consumers, it says.

“A trend seen among older children is the increasing penetration of products that have combinations of multiple textures as this appeals to children who are experimenting with different sensory experiences and looking for products that are different and innovative,” it adds. “This can be delivered by combining different elements such as sweet candies with sour gels and products with inclusions of different types of candies.”

BCBI also cites cultural influences and a desire for adventurous taste experiences, making exotic and tropical flavours popular among younger consumers.

“There are 17.4 billion sharing occasions each year, yet confectionery is featured in just 5.77% (1 bn) of those^{viii}, says



Nestlé. “This is a fantastic opportunity for growth as confectionery can play a key role in giving shoppers affordable ways to share and connect with others, it notes. “We’re already witnessing a shift, with sugar bags growing in popularity by 7.7% over the past year^{ix}. Tangy flavours are on the rise too and we’re excited to have launched Jelly Tots Tangy at the start of 2025.

“Innovation is vital in confectionery; consumers love



their classics, but are eager to try something fresh and exciting,” adds the company. In February, KitKat will introduce a new sharing bar range, featuring distinctive swirls in the chocolate shell and new flavour fillings that aren’t available in its singles range.”

Flavour remains very important to brand growth and one in four consumers are likely to experiment with flavours in chocolate confectionery^x, says Baileys Chocolate’s Robson. “Fan

favourites like salted caramel continue to be popular all-year round as shoppers look for indulgent flavours they are familiar with and are considered a ‘safe’ choice when purchasing.”

Salted caramel is a flavour that continues to resonate with consumers, agrees Staniford at Walker’s Nonsuch. “We believe in longevity and quality over quantity,” he adds. “While we keep an eye on emerging trends, we focus on flavours and textures that have

enduring appeal and can attract a broad demographic year after year. We want to create products that will be loved by our customers for years to come, focusing on flavours that have the potential to stand the test of time rather than chasing short-lived trends.”

In gum, fruit is the fastest growing segment with 70%^{xi} volume growth incremental and rising 23%^{xii} faster than mint, typically recruiting younger shoppers into the category, says Mars

Wrigley’s George. “It is growing ahead of the category, overindexing with younger consumers. In fact, one-third of fruit gum buyers are young adults or families with teenage children^{xiii}.”

Last year the company launched its Extra Watermelon SKU and, this year, plans to launch an “exciting new flavour combination” that leverages its insight into the gum sector.

Meanwhile, Grenade’s Austerberry says it’s important for retailers to continue

to give consumers a choice of popular flavours. “Grenade Oreo still remains the best-selling protein bar, with £2.2m in sales in the last 12 weeks^{xix},” she notes. Among HFSS-compliant flavours in Grenade’s range are Chocolate Chip Cookie Dough, Peanut Nutter and White Chocolate Chip Cookie. “Consumers are picking up protein bars for many reasons. However, the key drivers for this are protein and sugar content, which remain important,” she adds.

Analysis

secondary options such as FSDUs to meet this increased demand.”

Impulse and in-store

“As HFSS regulations continue to impact store layouts, consumers will develop new habits in-store and the confectionery aisle will likely see more footfall as shoppers cannot access these items elsewhere,” says Baileys Chocolate’s Robson. “Brands will need to ensure their labelling is clear and eye-catching and that they employ other on-shelf marketing strategies.”

When it comes to impulse purchases there are options with HFSS-compliant products and creating innovative displays, that optimise store layout, says World of Sweets’ Hague. Retailers should be looking to stock kid-friendly HFSS options at till points, and utilising compact space-saving units – such as World of Sweets’ 8-bag fixture add-on – that integrate with existing displays to maximise shelf space for grab-and-go items.

“The BCBI portfolio is built on impulse purchases and focused on convenience and independent stores where parents are happy to shop alongside their children,” says the company. “72% of consumers are influenced in what they buy by seeing confectionery in the store²⁶. For children, the most important part of their local store is the primary confectionery section, which is where we focus our activity and aim to create a strong presence and a clear block of children’s value-added sugar confectionery.”

“Impulse buying is a key factor for us, and we draw on our strong reputation for quality and emotional connection with customers,” says Walker’s Nonsuch’s Staniford. “Our packaging strategy is central to this success. We focus on creating visually irresistible products using colours, shapes, and techniques like foiling and film that catch the light. Positioning them at eye level ensures they stand out on the shelf, making it easy for shoppers to take notice and consider purchasing.”

Confectionery is in the top three most impulsively purchased categories in the convenience store market²⁷ and despite the HFSS regulations restricting where larger stores can position confectionery, there are still plenty of ways to tap into this opportunity, says Nestlé. “One effective strategy is to place single



+7.9%

Overall growth in the confectionery category¹

24%

of the total confectionery market is accounted for by sugar confectionery¹³

£150.4m

The value of the total protein bar categoryⁱ

£67m

The value of chocolate bars that contain added cereal, fruit or nutsⁱⁱⁱ

confectionery items within food-to-go fridges and fixtures. This makes it easy for shoppers to grab a sweet treat on the go. Using POS units that attach to food-to-go chillers or coffee machines is a smart move to maximise space and impulse opportunities. It simplifies access for shoppers, allowing them to quickly grab what they want without wandering through the entire store.

“In stores that are exempt from HFSS restrictions due to their size, consider creative point-of-sale solutions, like standalone display units near food-to-go sections or counter display units at checkout,” it adds. “These tactics can really help to boost impulse purchases.”

Gum is one of the most impulsive treats and snacks products purchased in retail, observes Mars Wrigley’s George. “Half (50%) of all gum sales are driven by impulsivity²⁸, and 40%²⁹ of all gum purchases are driven by seeing the product on-shelf – in fact, 46% of



Key messages for retailers

Asked to offer one key message to suppliers on the current confectionery sector, suppliers replied:

Mondelez: “Despite economic uncertainties putting pressure on household budgets, consumers still look for treats from trusted brands, so the confectionery category is more important than ever. Offer the right treats in the right formats and flavours, keep on top of best-in-class innovation, and tap into key seasonal moments to see sales success.”

World of Sweets: “Be excited about the value that sugar

and lower-sugar confectionery can deliver to your business. When making purchasing decisions, consider sugar confectionery formats that will offer value, novelty and innovation for your customers in 2025.”

Grenade: “Consumers are waking up to the potential for enjoying great-tasting chocolate bars that are low in sugar and packed with protein as part of their everyday diet. With 40% of snackers enjoying protein bars whilst out and about or between meals^{xx}, they are no longer only confined to the fitness audience. They are everyday treats that consumers

will enjoy again and again. Retailers can unlock the power of protein by following the simple advice of having the right range, in the right location in-store.”

Walker’s Nonsuch: “Our toffee is an affordable luxury that provides a sweet escape, even in challenging times. Despite the cost-of-living crisis and the struggles many face, toffees offer a moment of indulgence at a price point that feels like a treat, without breaking the bank. Toffees are more than just a product; they represent shared moments of happiness and comfort – something we all need a little more of.”

Bazooka: “The explosive growth over the last few years for sugar confectionery has been driven by innovation... a key driver of the category. Also, brands that have the trust of both children and their parents have continued to grow.”

BIP Candy: Make your fixtures or shelves more fun for children who want to experiment. Do children always want a chocolate bar or a bag of gummies? No. Sometimes they want excitement and there is lots of innovation out there like freeze-dried candy, fast food mixes, sour candy foams and sprays that bring joy and delight for kids.

gum sales will be lost if the product cannot be found³⁰.

“However, the shopper landscape is evolving rapidly and will continue to do so as shoppers and retailers adopt new technology to meet their changing needs and priorities,” she adds. “An example of this is the decline of traditional transaction zones to give way to self-service terminals and scan-and-go technology. Up to 80%³¹ of store sales now go through self-scan, up from 55% in 2020 and this trend is growing at the expense of manned checkouts. Conversion levels at self-scan checkouts can be as much as one-third less than manned checkouts due to lower shopper dwell times and reduced space for executing; the average dwell time at a manned checkout is 1 minute 55 seconds compared to 12 seconds for self-scan³².

“Retailers need to consider how they can maximise conversion rates and impulse sales in this location by

working with brands to deliver optimal equipment solutions, maximising product assortment within arm’s length of the checkout terminal and using theatre to disrupt shoppers.”

The staying power of sustainability

Sustainability remains an important topic to shoppers and there’s now an expectation that suppliers and retailers will help them make sustainable choices, says Nestlé. “Nestlé UK&I has been leading the way in sustainability for a number of years, from responsible sourcing of ingredients to reducing the environmental impact of our operations and packaging,” it notes. In January 2022, the company launched the Nestlé Income Accelerator Programme, which incentivises and enables cocoa-farming families in Côte d’Ivoire to take actions that can improve their livelihoods, benefit the environment and the local community, including good agricultural practices, agroforestry

activities, school enrolment and opportunities for diversified incomes.

The company also works with around 40 dairy farmers in Ayrshire, through dairy co-operative First Milk, to supply all of the fresh milk used in its UK-produced confectionery and are committed to a range of regenerative agriculture practices on their farms. These practices aim to address the triple challenge of reducing emissions, improving productivity and enhancing biodiversity in our dairy supply chain.

And finally, the company trialled a first of its-kind paper tub on its Quality Street brand in Christmas 2024. More than 200,000 paper tubs went out to selected stores over the festive season, carrying around 150 tonnes of the popular sweets in total.

One key initiative at Walker’s Nonsuch has been reducing plastic usage, says Staniford. “For 98% of our orders, we now use 100% recyclable LLDPE pallet wraps, which helps

Analysis

lower our environmental footprint. Additionally, we've focused on energy efficiency, installing LED lighting with PIR sensors in our factory and offices, and introducing electric vehicles into our fleet to reduce emissions and support cleaner operations.

"Beyond packaging and energy improvements, we've invested in a more efficient bagging machine that consumes less energy, and we prioritise UK-sourced ingredients and packaging to minimise transportation emissions."

A more sustainable supply of key raw materials such as cocoa and wheat is critical to the continued growth and success of Mondelez International's business, as well as to the resilience and prosperity of the communities producing these raw materials, and to the protection of the landscapes where the ingredients are grown, says Nash. As of the end of 2023, approximately 85% of cocoa volume for Mondelez International chocolate brands was sourced through the company's Cocoa Life sustainability sourcing program³³, which focuses on helping tackle the root causes of complex systemic issues in cocoa farming, she says.

"In November 2024 we announced that Cadbury core sharing bars, manufactured in Bournville and Coolock and sold in the UK&I, will be wrapped in 80% certified recycled plastic packaging," she adds. "The project will allocate an equivalent amount of around 600 tonnes of post-consumer recycled plastic across ~300 million bars per year³⁴."

Last year, Mars Wrigley UK announced the second stage of its pilot with Tesco trialling a new display made from waste cocoa bean shells and recycled paper – a "global first" for the confectionery category, reveals George. "The new material, named Cocoa Cardboard, eliminates the need for virgin tree fibres in the production process," she says. "The units perform as well as those made from other virgin-fibre based materials and based on a full lifecycle assessment (LCA), deliver a 94% reduction in land usage, 59% reduction in water usage and 30% reduction in greenhouse gas emissions vs conventional cardboard. The material is also fully recyclable through normal channels. Cocoa Cardboard represents the next stage in Mars Wrigley's commitment to reach net zero



by 2050 and reduce its greenhouse gas emissions."

Baileys Chocolate wants to lead the charge within the confectionery sector towards a more ecologically sustainable future, without having to sacrifice providing customers with high-quality products in memorable packaging formats, says Robson. "The brand is dedicated to moving away from plastic and towards sustainable options throughout its supply chain," she says. "Our upcoming Easter collection is Rainforest Alliance-certified, our Easter eggs are packaged without any plastic trays, and our Baileys Chocolate Mini-Delight pouches and the Baileys Chocolate Nut Range are all packed in fully recyclable pouches."

BIP Candy is reducing plastic usage and incorporating paper and biodegradable materials, says Fretwell. "We have removed plastic inserts and wrap from our candy and novelty ranges and seasonal products and developed products made from paper and not plastic. The Real Good Egg, with collectable cardboard characters, and Magic Cube, containing licensed character puzzles and wooden pencils – both of which have a portion pack of fruity stars – shows we are serious about prioritising the health of our planet."

Sources

- ^{1&2} Circana, All Outlets & KWP Discounters, Confectionery, Value & Unit Sales, % change YoY, L52wks to 28.12.24
- ³ Lumina Intelligence, Convenience Tracking Programme 12 w/e 05.07.01.24 01.25 vs 12 w/e 05.07.01.24
- ⁴ Circana, All Outlets & KWP Discounters, Chocolate, Value Sales, % change YoY, L52wks to 28.12.24
- ⁵ See 1, Value Sales only
- ⁶ NIQ, Total Coverage, w/e 28.12.24
- ⁷ NIQ, Total Market YTD, 52 w/e 28.12.24
- ^{8&9} Nielsen, Total Coverage, YTD data to 05.10.24
- ¹⁰ Nielsen, MDLZ Total Coverage, data to w/e 30.11.24
- ¹¹ MDLZ Voxpop Duos study, conducted with 96 respondents, 30.03.21
- ¹² Nielsen Indies & Symbols, Total Confectionery, Value Sales (£), w/e 22.06.24 vs YA
- ¹³ Nielsen, Total Candy, (Std & SYC), MAT 52wks to 02.11.24
- ¹⁴ Kantar, Latest 52 wks to 29.09.24
- ¹⁵ Data provided by BIP Candy and Toy
- ^{16&17} Circana, EXT Marketplace, MAT data to 22.12.24
- ^{18&20} Kantar WPO, Packaged Snacking, 13 w/e 31.03.24 vs 14 w/e 09.04.23
- ²¹ YouGov, Most Popular Brands Q1 2023 Survey/Nielsen, 52 w/e 27.04.24
- ²² 'Mint Chocolate Market', Size, Share & Trends Analysis report 2024
- ^{23&24} IGD, April 2024
- ²⁵ Circana, Full Season, excl clearance 2024
- ²⁶ Mintel, UK Report 2024
- ²⁷ Lumina Intelligence, Convenience Tracking Programme, 52 w/e 05.01.25
- ²⁸ MW research, Grocery customers, 2020
- ^{29&30} MW research, Grocery customers, 2021
- ³¹ The Grocer 2023, <https://tinyurl.com/d47bxpcn>
- ³² MW Location Study by store hotspot, Grocery Retailer, 2020
- ³³ Representing progress from 80% in 2022
- ³⁴ Based on forecast 2026 sales volumes, excl non-certified wrappers and considering the use of mass balance material

Health in mind

^{1&18} IRI Marketplace, Protein Bars, Total Market, Value Sales, 52 w/e 24.11.24

¹⁹ Statista, <https://tinyurl.com/y3jtr2a>

²⁰ Barry Callebaut report

²¹ Mintel, November 2024

^{22&23} Mintel 2024

Flavours and textures

^{1&18} Kantar Usage Panel, In-home and carried-out occasions, 52 w/e 01.09./24

¹⁹ Circana, All Outlets & KWP discounters, Sweets, Value Sales % change YoY, L52 w/e 28.12.24

²⁰ Innova Market Insights, <https://tinyurl.com/2mwh8ddb>

²¹ MW research 2021 – Grocery customer

²² Total Fruit Gum vs Total Mint Gum market trends, GB Total Coverage, L52 w/e 14.10.23 vs YA and 2YA

²³ Kantar TH panel, May 2024

²⁴ IRI Marketplace, Protein Bars, Total Market, Value Sales, 12 wks to 24.11.24

²⁵ Market Measures, Consumer Research, Feb 2024

Sweet and sour innovation

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Juicy Drop Gummy Dipperz
Juicy Drop Blasts
Juicy Drop Mallows
Bazooka Splashz
Bazooka Mix Upz
Bazooka Sour Chewz
Big Baby Pop
Push Pop
Ring Pop
Mega Mouth

↙ Bazooka Candy Brands has grown at 18.5%, five times faster than the overall sugar confectionery category¹. Juicy Drop has grown at 15.6% in the UK market and, in 2024, became the UK's No.1 kids sugar confectionery brand². Meanwhile, Juicy Drop Gummy Dipperz, introduced in 2023, has quickly become a firm favourite and is one of the top 10 kids' confectionery products in its first year of launch, and growing by 137% in 2024³.

Meanwhile, Tropical – the newest addition to the Juicy Drop Blasts family – is exploding onto the confectionery scene. The delicious, sweet chews with a blast of sour powder originally launched in 2020 with sweet and sour chewy share bags and are now well established in the market growing at an impressive 69% year on year⁴, reveals the company. Available in 120g PM bags (RRP £1.15) and 140g and 120g non-price-marked bags, Juicy Drop Blasts Tropical come in six flavours – Lime, Mango, Passion Fruit, Pineapple Coconut, Watermelon and Banana.

With the UK marshmallows market now at US\$8.9m in 2023 and predicted to grow by 36% by 2030⁵, Juicy Drop recently introduced Juicy Drop Mallows in Blue Raspberry and Cola flavours. A sour twist to these sweet soft and fluffy marshmallows brings some much-needed excitement to the sub-category, currently dominated by strawberry and vanilla plain mallows, says the company. The sweet mallows have a unique sour fizzy coating and come in 100g sharing bags (RRP £1.25).

“At Juicy Drop we're all about daring to provide innovative sweets for kids of all ages,” it notes. “Our new Juicy Drop



“With the UK marshmallows market at US\$98m in 2023 and predicted to grow by 36% by 2030⁵, Juicy Drop recently introduced Mallows, bringing some much-needed excitement to this sub-category”

Mallows offer something new and exciting to the growing mallows market while delivering value and, most importantly, great taste.”

Bazooka Candy Brands also had an amazing year in the chews category with a successful relaunch of Bazooka Chews range in blue packs, as well as new products Bazooka Splashz and Bazooka Sour Chewz. “The new Bazooka blue range means we now have a fantastic range and a strong presence on-shelf,” it says. “We've also seen amazing growth for the Splashz range, with its three different pack combinations – Tropical Punch, Berry Blasts and Fruit Fiesta – featuring fantastic texture and the taste of real fruit juice. Individually wrapped, they are perfect for trick or treating or a movie night in. Meanwhile, gel-filled Splashz Candies are ideal for on-the-go snacking, and their delightful flavours make them a hit at gatherings.”

In 2025, Bazooka's marketing will focus on driving impactful engagement and reach through a comprehensive mix of digital initiatives, including activations across platforms like YouTube and TikTok. “These showcase our content to highly targeted audiences, ensuring meaningful connections,” it says. “Our edible entertainment brands will be brought to life through influencer marketing and social media activity, amplifying our message, strengthening our brand presence, and achieving measurable results.”



Source

¹ Circana, MAT data to 22.12.24
² Circana all outlets, Kids sugar confectionery – client defined, Value sales MAT 27.10.24
³ See 1
⁴ Circana, UK MAT Value % vs YA data to 09.06.24
⁵ Cognitive Market Research, Global Snapshot Marshmallow Report

Bringing excitement to the shelf

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Gummi Zone
King Gummi
Magic Rainbow
Mouthglower
Pop Ups
Funriders
Thorncroft

Licences: Stitch, Paw Patrol, Disney, Marvel, Gabby's Dollhouse, Peppa Pig

Private-label novelty confectionery

At BIP Candy & Toy UK, our fundamental goal is to bring fun and joy to children, says Lee Fretwell, head of UK sales & marketing. "So, our mission is to bring excitement and engagement across the shelf with our eclectic range of candy and toy products," he says. "At times, sweet fixtures are just full of mainstream chocolate and sweets and our job is to be a disruptor amid all of that noise."

So, who is BIP Candy & Toy UK? "We are an inventor, manufacturer and distributor of high-quality novelty toys and candy products," explains Fretwell. "We can take your vision for a season – let's say Christmas – and, together with our creative teams inhouse, bring those ideas to life in-store, with a vast array of characterised private-label confectionery, branded and/or licensed products."

Busy launch year ahead

"Our roadmap for 2025 is exciting, and we have four pieces of thrilling news to share with you," he reveals.

"With the food gifting trend on the rise, we are taking Gummi Zone to the next level. GZ has doubled in size over the last three years and is now £5m in GSV sales (+10% YOY)¹.

"Last year, we launched a trio of gummy sharing bags priced at £1.25 RRSP. These have taken the market by storm, so this year we are supersizing it with 'King Gummi – where Sweetness Rules', launching in summer 2025. King Pizza, Burger, Fries, Taco, Noodles and Sushi are a perfect candy meal to share with your family. Bank on King Gummi to bring in more shoppers who spend more, more often, and add category value to your sweet category."



“Our mission is to bring excitement and engagement across the shelf with our eclectic range of candy and toy products”

Next off the BIP Candy train is the company's brand-new confectionery range, Mouthglower, he adds. "The world of candy is changing rapidly. Kids are demanding extreme sour flavours to challenge their friends and experience the next viral trends. Our candyologist has been working away in a top-secret location and is now ready to launch our most vibrant glowing sweet-and-sour favourites. This fantastic range includes Candy Sprays, Foam, Painters, Rollers and Dippers, all in different varieties and flavours; including Sour Apple, Strawberry, Blueberry and Cola."

2025 also sees the introduction of some epic blockbuster movies. "Our range of Marvel Pop Ups are perfect for the Captain America film coming out this month," says Fretwell. "In May, Lilo & Stitch hits our screens, and our exclusive Stitch Pop Ups are ready to purchase. Fast-forward to October and Gabby's Dollhouse, or SpongeBob SquarePants in December, and we will have single or blister packs available. Or, if you want something that speaks back... another new offering for 2025 is our Talking Pop Ups!

"Finally, to support parents shopping on a budget, we've refreshed our range of affordable £1 novelty lines under the Fun-riders brand. Products such as Mobile Pop, Plunger Pop, Wild Monkey or Sour Explosion will evoke some fun and excitement for children on a Friday treat day."



Source
¹ Circana, Jan-Dec 2025 vs 2024

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*Circana Data 12/23 - 12/24

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Creating confectionery with a twist

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Walker's Nonsuch
Nonsuch Toffees

Family company Walker's Nonsuch is celebrating over 130 years of toffee-making. National sales manager Alan Staniford comments: "We've had a good year, driven by consistent sales and continued success. Staying true to our original 1894 recipe, we remain committed to innovation to meet the growing demand for delicious toffee that everyone can enjoy."

"Our expanding selection of flavours caters to every palate, from classics such as English Creamy and Dark Chocolate to adventurous lines like Coffee and Banana Split Éclairs. We're proud to be one of the oldest independent family-owned confectionery manufacturers, and our range includes toffee bars, jars, bags filled with twist-wrapped toffees and chocolate éclairs, and a gift range featuring traditional British hammer packs. For a touch of indulgence, our Salted Caramel blends creamy toffee with rich caramel and premium Anglesey Sea Salt."



“Our expanding selection of flavours caters to every palate”

In a competitive market, Walker's Nonsuch sets itself apart with strategic product placement and premium packaging, featuring vibrant colours, soft-touch materials, light-catching foiling, and eye-catching designs that stand out on-shelf, explains Staniford. "Across 2025, new marketing initiatives include high-quality materials, POS displays, and consumer tasting events."



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KEY BRANDS

Grenade

↘ The demand for protein bars has continued to surge, with the category now worth £150.4m, up 8% vs the previous 52 weeks¹. “This is another year of consistent growth, with Grenade at the forefront, amassing £71.5m in brand sales (a 47.5% total market share)²,” says Rachel Austerberry, UK sales director at Grenade. “Compared with 2022, the category has leapt ahead by a staggering 42%, with Grenade contributing over half (58%) of that growth³ and showing the incremental importance its products have in driving protein bars forward.”

New campaign

The snacking landscape continues to be fuelled by consumers’ desire for great-tasting, healthier alternatives, she notes. “As the UK’s No.1 protein bar brand⁴, Grenade’s new ‘Revolutionary Snacking’ campaign is set to deliver this message to shoppers who want to snack better but won’t compromise on taste. With a wealth of experience and incredible reviews, Grenade aims to introduce ‘Chocolate 2.0’ to unlock the power of protein to consumers who want to enjoy chocolate, guilt-free.”

Core range

Grenade’s core flavours continue to delight shoppers, she adds, and Grenade Oreo remains the best-selling protein bar with £2.2m of sales in the last 12 weeks⁵, achieving a £ROS of £7.97⁶. “With eight of the top 10 best-selling protein bars in the UK, including HFSS-



“The snacking landscape continues to be fuelled by consumers’ desire for great-tasting, healthier alternatives. Grenade’s low-sugar high-protein bars deliver on this”

compliant flavours such as Chocolate Chip Cookie Dough and White Chocolate Cookie, retailers should continue to stock these popular lines to give consumers choice,” she says.

“Although Grenade’s 60g singles are protein powerhouses, they also compete versus traditional confectionery for cash ROS⁷; our best-selling flavours provide a lucrative return compared to popular confectionery singles that have been in retail ranges for decades.

35g snack size option

“This change in shopper needs is apparent in the different formats in which consumers are enjoying protein,” she adds. “The introduction of the Grenade 35g option provides consumers with a snack-size bar that still packs the same iconic taste of the wider range – perfect to entice new consumers into protein or provide an option alongside a broader meal choice. As the 35g meets a different consumer need to the 60g, retailers should treat the two formats differently, ranging them apart in-store to capitalise on both shoppers.”

Multipacks

Finally, for those consumers seeking a take-home solution, Grenade’s best-selling protein bars come in a 4 x 60g multipack that can sit alongside other larger pack formats in-store, she says. “These provide great value and choice for shoppers and drive basket spend.”

Source

^{1,2} IRI Marketplace, Protein Bars, Total Market, Value Sales, 52wks to 24.11.24

³ IRI Marketplace, Protein Bars, Total Market, Value Sales, 2 year to 24.11.24

⁴ IRI Marketplace, Protein Bars, Total Market, Value Sales, 52 wks to 24.11.24

⁵ IRI Marketplace, Protein Bars, Total Market, Value Sales, 12 wks to 24.11.24

⁶ IRI Marketplace, Protein Bars, Total Market, CROS, 12 wks to 24.11.24

⁷ IRI Marketplace, Protein Bars v Confectionery Singles, Total Market, CROS, 12 wks to 24.11.24



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*IRI Marketplace, Total UK Market, Value Sales, Grenade Protein Bars, 52wks to 24.11.24

Skyrocketing innovation

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Bebeto

2024 was a landmark year for Bebeto, achieving remarkable growth by doubling turnover in just two years, reveals Phil Hulme, commercial director at Kervan Gida UK.

“We sold over 46m packs of sweets, welcomed 21 new customers, and gained over 40,000 social media followers,” he says. “It was a phenomenal year, capped off by the launch of eight new products, including fan favourites like Super Sour Weenie Worms and our viral Freeze Dried Sweets. These innovations, combined with a commitment to maintaining a £1 price point across our core range, have helped achieve around £42m RSV. In retail grocery, our sugar confectionery brands rose 37.3% YOY in 2024¹.”

Furthering the freeze dried trend

Hulme highlights the impact of Bebeto’s freeze dried confectionery: “We’ve transformed the market with our new ‘Freeze Crunchy’ range, inspired by TikTok trends that have generated 122m related posts. As the first major brand to bring freeze dried sweets directly to retail, Bebeto has set a new benchmark,” he says.

To strengthen this position, Bebeto acquired its own freeze-drying factory, becoming the UK’s first mainstream confectionery brand to produce freeze dried sweets in-house. “Owning the production process allows us to guarantee the highest quality, and it’s paying off,” Hulme notes. “In just three months post-launch, our freeze dried range has generated £2m RSV, with over 1 million packs sold.” This vertical integration allows the freeze dried range to be offered at £2 RRP per pack – one of the most competitive prices in the market, adds Hulme. “We’re expecting unprecedented future growth,” he says.

Liquid-filled innovation

Looking ahead, Hulme is excited about Bebeto’s pioneering debut of liquid-filled technology. “This cutting-edge technique transforms gummies into sensory experiences, with gooey, flavour-packed centres encased in soft foam-backed



“2024 was a phenomenal year: we sold over 46m packs of sweets, welcomed 21 new customers and gained over 40,000 social media followers”

gummies,” he notes. “It’s a game-changer, especially with Gen Z’s love for bold textures and flavours.”

Seasonal surprises

Seasonal launches have fuelled Bebeto’s growth, and 2025 will continue to do so, reveals Hulme. “We’re introducing two exciting products using our liquid-filled technology.”

In February, Bebeto will debut its Valentine’s range with You Melt My Heart soft gummy hearts. “Each gummy features Strawberry and Cherry flavours with a luscious raspberry liquid centre,” Hulme explains. For Easter, Bebeto will launch Runny Eggs, a playful twist on fried egg gummies.

“These treats feature a gooey, liquid-filled yolk in mango, orange, and peach flavours. It’s a whole new experience for confectionery fans.”

With bold innovations and a commitment to quality and affordability, Bebeto is set to make 2025 even sweeter for its customers, concludes Hulme.



Source
¹ The Grocer Top Products Survey 14.12.24 in association with NIQ

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Galaxy
M&M's
Mars
Maltesers
Skittles
Snickers
Starburst
Twix

Category innovation is vital to keep consumers engaged and to foster brand loyalty, but in the gum segment, it serves another purpose – to appeal to the changing nature of consumer motivations for chewing gum, which has evolved considerably in recent years.

Consumers have traditionally chewed gum for functional reasons; two out of three consumers chew gum because it tastes great¹, and other primary reasons are to freshen the breath and to benefit dental health in between brushing occasions.

Evolving consumer needs

However, consumers today have evolving needs, with a new generation of gum shoppers enjoying the product to benefit their holistic wellness.

Research shows that one in two chew gum for wider functional and emotional benefits and that gum over-indexes in mental reset associations². Additionally, one in two³ chew gum to alleviate stress and avoid treats. This highlights the opportunity for retailers to respond to this new consumer need by repositioning gum as more than a functional product.

Ross Ripamonti, gum brand director at Mars Wrigley, says: “Gum innovation is led by consumer trends as much as any other segment in the confectionery category. Mint is still popular, but fruit gum is leading the charge; we are seeing a proliferation of new products that are expanding the offering beyond mint into exciting fruit flavours, flavour combinations and different textures with products having a softer chew experience, for example.”

Fruity flavours are at the heart of Mars Wrigley’s gum NPD, with last year’s



“We are seeing a proliferation of new products that are expanding the offering beyond mint into exciting fruit flavours, flavour combinations and different textures, with products having a softer chew experience, for example”

Extra Watermelon flavour proving popular – it achieved a 5% share of fruit gum in its first year and outstripped previous fruit gum launches⁴. This marries up with industry trends, where fruit is the fastest-growing gum segment with 70%⁵ volume growth incremental and is growing 23%⁶ faster than mint, typically recruiting younger shoppers into the category. In fact, the opportunity for gum with the Gen Z market is ripe, with the recent Extra Chew Good campaign directly targeting this audience. Mars Wrigley has doubled fruit gum over the last two years and this trajectory is expected to continue.

Ripamonti continues: “Product quality is vital if we are to build on the success of the fruity gum partition, and increase household penetration while growing the category, too. Recent research proves that Extra Refreshers Tropical and Bubblemint flavours, for example, provide a superior chew experience after just 60 seconds of chewing, maintaining this superiority after 12 minutes of chewing, offering longer lasting flavour⁷.”

The consumer demand for a variety of top-quality products is not letting up, highlighting the need for retailers to have the strongest range on offer to maximise the revenue opportunity.



Source

¹ Ipsos Chewing Gum Understanding (Current Gum Chewers), US 2022
² Toluna Harris Interactive – July 2024 (Mars UK research)_Mars Global Research – Kantar September 2023
³ Ipsos Chewing Gum Understanding (Current Gum Chewers), US 2022
⁴ NIQ, Value Sales Total Coverage, 2024
⁵ Kantar, TH Panel, Total Market, Total Gum, 52 w/e 14.05.23
⁶ Total Fruit Gum vs Total Mint Gum market trends – GB Total Coverage, Latest 52 Weeks vs YA & 2YA – w/e 14.10.23
⁷ Mars Refresher gum claims, October 2024

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* Source: NielsenIQ Scantrack Data, Total Coverage, 52 WE 02.11.24

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Promoter: Mars Wrigley Confectionery UK Limited, 3D Dundee Road, Slough, Berkshire, SL1 4LG. ©2025 Mars or Affiliates.

A year of treats for shoppers

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Mikado
Toblerone
OREO
Ritz
Barny
Sour Patch Kids

➔ Mondelez International’s mission is to provide consumers with the right snack, for the right moment, made in the right way. “Despite economic uncertainties pressurising household budgets, consumers are still looking for treats from trusted brands,” says Susan Nash, trade communications manager at Mondelez. “Offering these in the right formats and flavours allows retailers to cater to every shopper. For example, a range of gifting options is important to tap into spring occasions and beyond.”

Bringing you more

One of Mondelez’s biggest product launches over the past year has been Cadbury Dairy Milk &More which was the most successful block launch to date¹ worth over £17m². Cadbury Dairy Milk &More Nutty Praline Crisp and Cadbury Dairy Milk &More Caramel Nut Crunch have introduced new consumers to the category, as well as attracting a younger adult shopper³.

Made to share

Cadbury is building on its spirit of generosity by introducing Cadbury Dairy Milk Made to Share – 12 limited-edition front-of-pack designs for its 180g and 95g bars. These pose questions such as ‘Who Pays the Subscription?’, ‘Who Drove?’ and ‘Who Cooked?’, all centred around appreciation for each other to encourage shoppers to pick up a bar to share with someone they care about.

Delights for shoppers

The Cadbury Delights range offers shoppers a lower-calorie chocolate treat, with delicious soft nougat and caramel



Source
¹ Nielsen, YTD, Total Coverage, w/e 05.10.24
² Nielsen, MDLZ Total Coverage, data to w/e 30.11.24
³ Kantar Worldpanel, 29.09.24



“Despite economic uncertainties putting pressure on household budgets, consumers are still looking for treats from trusted brands”

bars coated in Cadbury chocolate. In three flavours – Salted Caramel, Orange & Caramel and Hazelnut & Caramel – Cadbury Delights hit the sweet spot for permissible indulgence without compromising on taste.

Seasonal success this spring

“2024 saw our most successful Easter ever, so this year we’re offering more seasonal options with a raft of new Easter treats and returning favourites,” says Nash. “These include the Cadbury Easter Favourites Pouch, our first-ever pouch made of paper. With Mini Cadbury Dairy Milk Eggs, treat-size bags of Cadbury Mini Eggs and Cadbury Creme Eggs, the new pouch is ideal for egg hunts.”

Snacking Made Right

Mondelez strives to continually reduce and evolve its packaging as part of its global sustainable goals, says Nash. “For example, from 2025, Cadbury core sharing bars, manufactured in Bournville and Coolock and sold in the UK&I, will be wrapped in 80% certified recycled plastic packaging. Through such innovations, we’re making snacks in a way we believe is right for people and right for the planet.”

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* Now worth over £14.2M RSV (Nielsen, YTD, Total Coverage, w/e 05.10.24) +£1.2M RSV vs the Caramilk platform / +£3.4M RSV vs Caramilk, in the equivalent launch year time frame (Nielsen, YTD, Total Coverage, w/e 30.10.21). [^] 50% Category Incrementality (Kantar Worldpanel, YTD, w/e 29.09.24).

Toxic Waste bursts into 2025

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Toxic Waste Hazardously Sour Candy
Toxic Waste Slime Licker

 Toxic Waste Hazardously Sour Candy is starting 2025 with a bang, with not one but three brand new candy lines launching into the UK market, reveals Katie Ward, commercial director at UK distributor for the brand Newbridge Confectionery.

Considered by many consumers and publications to be the world’s sourest candy, it’s 21 years since the edgy American brand launched in the UK. With the sour confectionery market now looking vastly different, delivering flavour and format innovations has been key in driving Toxic Waste’s continued relevance and appeal.

“It’s such an exciting time for the brand,” says Ward. “Coming out of our strongest sales year to date, the three fantastic new additions to the Toxic Waste Candy line are sure to delight consumers and retailers alike.”

Social media sensation

With over 363m TikTok views to date for #SlimeLicker, the launch of two new Toxic Waste Slime Licker products is sure to create even more of a buzz on socials.

“We are especially thrilled to introduce Slime Licker Blue Razz Chocolate Bar,” says Ward. “A market first, combining a tangy, slime-like centre with luxurious Belgian chocolate, it’s ideal for candy lovers who will enjoy a playful yet premium twist on traditional chocolate bars.”

Toxic Waste’s iconic candy drum also sees its first new addition in eight years, with five amazing new blue sour flavours. “Blue raspberry is consistently our most popular flavour across the range, so we’re sure this



“On top of our strongest sales year to date, the three new additions to the Toxic Waste Candy line are sure to delight”

will hit the spot for sour fans old and new,” she notes.

Digital and in-store activations

Driving the original explosion of the brand’s popularity, social media and digital marketing remain an important focus for Toxic Waste.

Elsewhere, says Ward, there are plans to leverage the brand’s eye-catching and iconic branding. “We are planning a number of exciting in-store activations through 2025, as well as a continued focus on our unique seasonal offering,” she says.

New lines for 2025

Toxic Waste’s new lines (below) will be available nationwide from February.

- Slime Licker Blue Razz Chocolate Bar, RRP £2.00: Toxic Waste invites you to experience the thrill of a tangy Blue Razz centre, combined with rich Belgian chocolate, offering a premium and unconventional flavour that stands out from the usual candy options.
- Slime Licker Double Play, RRP £1.25: Combines two sour flavours in one, for a deliciously tangy, packable snack.
- Toxic Waste Hazardously Sour Candy blue drum, RRP £1.49: Hard candies in five sour blue flavours in an exciting update of the iconic candy drum.





NEW for 2025!



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Betting big on new taste sensations

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KEY BRANDS

McVitie's Gold Billions
Flipz

pladis has long been known as the name behind some of the nation's favourite snacks – from Britain's biggest biscuit brand McVitie's, to bagged snacks staple Jacob's Mini Cheddars. However, not content to rest on its laurels, the snacking giant reveals that it is continuing to successfully expand into new territories and categories – including confectionery, where its 'swavoury' snacking sensation Flipz brand and award-winning McVitie's Gold Billions Wafer have been taking the category by storm.

Striking Gold (Billions)

An icon reimagined, McVitie's Gold Billions stormed the scene in 2023 as the first new take on much-loved McVitie's Gold, notes pladis. "Since then, it has flown off the shelves, generating sales of £5m¹ to become the No.1 on-to-go sweet biscuit in impulse². "Confectionery shoppers increasingly seek indulgence – and McVitie's Gold Billions delivers that with its layers of delicious wafer, chocolate cream filling and chunky coating of golden caramel chocolate," it says. "The single bar format taps into the growing demand for indulgence on-the-go by giving shoppers easy access to their biscuit fix – whether it's as part of a meal deal or a grab-and-go sweet treat.

"We're always looking to maximise the opportunity for retailers; so, leaning further into our indulgent-led



“We are continuing to expand successfully into new territories and categories – including confectionery, where our ‘swavoury’ snacking sensation Flipz brand and award-winning McVitie’s Gold Billions Wafer have been taking the category by storm”

strategy, we've just launched McVitie's Gold Billions Chocolate & Hazelnut. Thanks to the range's existing success, as well as this flavour's huge 88% intended repurchase rate in consumer testing³, independent retailers have embraced the new flavour with open arms, and it will be coming to supermarket shelves this summer.

"Meanwhile, we're betting big on Billions' debut social and PR campaign which, alongside in-store POS, will run throughout February and March."

Flipz-ing the script

Adding value with attention-grabbing new flavours is nothing new to pladis, it says. The company has been enticing a new generation of shoppers to confectionery since it brought popular US 'swavoury' brand Flipz to the UK.

"Currently worth £12.7m⁴ and counting, Flipz has been one of the biggest snack brands to launch over the past five years⁵," it says. "Our innovation strategy – focused on bringing exciting flavour combinations with strong appeal overseas to British supermarket aisles – has kept the category exciting and won over an army of loyal fans.

"Most recently, we launched a limited-edition Flipz Cinnamon Bun Flavour – leveraging this popular trend to unlock a share of the huge +14% CAGR forecast for cinnamon products between now and 2027⁶ – and it worked. Popular with grab-and-go snackers and those looking for something to share on cosy evenings in, Flipz is a three-dimensional taste sensation, and appeals even more due to its affordable everyday price point."



Source

^{1,2} Nielsen IQ, 18.05.2024
³ Wiral Sensory Services, August 2024
⁴ Nielsen, Total Cov incl discounters, L52W to 04.05.24
⁵ Brand Value Sales, MAT last 5 years
⁶ Europe Cinnamon Market Trends, Growth, Size Analysis 2021, UK, Germany, Italy, Spain, London (marketdataforecast.com)

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* Nielsen 28.12.24, since launching in May 2023

Agile response to trends

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KEY BRANDS

Rolla Belta
Dino Jelly
Ocean Jelly
Dipper
Zoom Lollipop
Monster Mix
Jelly Filled
Mega Pencil

↙ Vidal has experienced strong growth over the past year, with a 20% increase in sales¹, reveals commercial marketing lead Joe Major. “This growth has been driven by several key product innovations,” he says. “One of the standout brand launches has been the Novelty Jelly Burger, which has successfully expanded our distribution across both retail and impulse sectors. Capitalising on the novelty sweets trend, this product has resonated well with consumers due to its unique and fun nature.

“Also, our Lollipop Tongue Painter saw success after we quickly responded to a viral TikTok trend. The blue tongue painter lollipops experienced a surge in demand, highlighting our ability to be agile and capitalise on emerging consumer trends.”

Halloween remains a key season for the Vidal brand, and its Monster Mix 150g has performed exceptionally well in the impulse channel, adds Major. “Based on its success, we will reintroduce this product in 2025, adding a new SKU to further drive excitement and sales.

“Looking ahead, we plan to build on these successful introductions and continue to respond to emerging trends. Our focus remains on maintaining a competitive edge by staying agile and innovative in product development.”

To stand out on-shelf Vidal uses vibrant and fun packaging, which communicates the playful nature of its products while conveying quality, explains Major. “This eye-catching packaging helps us differentiate from competitors and capture consumer attention in a crowded retail environment,” he says. “We also continue to collaborate with suppliers to push the boundaries of packaging innovation. By experimenting with new materials, shapes, and finishes, we make sure our products not only stand out but also enhance the overall consumer experience.

“In 2025, we will launch a new range of shelf-ready packaging (SRP) across a large portion of our range,” he adds. “These SRPs are designed to improve visibility and make stocking and



“Key initiatives for 2025 include the introduction of official social media accounts, allowing us to directly engage with consumers and build an online community. These platforms will feature new product launches, behind-the-scenes content and exclusive promotions”

displaying our products more efficient. The first examples of these updated SRPs will be showcased at the Food and Drink Expo at the NEC in April.

“By combining innovative design with practical functionality, we create a distinctive presence on-shelf that resonates with consumers and retailers, ensuring our brand stands out in a competitive marketplace.”

In 2025, Vidal is making its biggest investment in the brand to date, with a comprehensive marketing strategy that will deepen its connection with consumers, reveals Major. “Key initiatives include the introduction of official social media accounts, allowing us to directly engage with consumers and build an online community. These platforms will feature new product launches, behind-the-scenes content, and exclusive promotions.

“We will also introduce several exciting new products that will expand our portfolio and resonate with both loyal customers and new consumers, maximising exposure.

“Finally, 2025 will mark the launch of our first-ever consumer campaign, designed to build deeper emotional connections with our audience. This campaign will use compelling storytelling, targeted messaging, and creative visuals to generate excitement and further elevate our brand.”

Source

¹ Internal company data

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Sweet Vibes
Antho Berg
Pez
Warheads
Crazy Candy Factory
Tootsies
Red Vines
Sweet Bandit
Kidsmania

↙ The UK’s leading distributor of confectionery¹, World of Sweets, is set to energise the sugar confectionery market with an innovative range of products for 2025.

The sector is continuing to thrive, with consumers looking for exciting flavours and confectionery combinations, as well as brands they can trust to offer value for money.

By offering products from World of Sweets’ core brands to customers who are new to the market, retailers can stay ahead of the competition, says sales and marketing director Helen Bradshaw.

In 2025, award-winning Bonds of London, which sold over 22m units in 2024² will celebrate its 130th anniversary. New for 2025, Bonds will be launching Trail Mix, part of the company’s healthier initiative, introducing more nutritious options to its range. Packed with dried fruits, nuts and berries, Trail Mix is available in three flavour combinations – Chocolate Orange, Sticky Toffee and Banoffee Pie – and comes in 25g snack-sized portions at 70p RRP. “The classic flavour combinations offer customers a chance to satisfy their sweet cravings and, with 114 calories or less, they’re a great guilt-free and portion-controlled treat,” says Bradshaw.

Also new to the Bonds range will be four new candy cups, including the Birthday Cake Candy Cup, to mark the brand’s 130th birthday.

Discover Sweet Vibes, confectionery designed to reject the boring and embrace the oddball, will launch Mallow Dunkz – an innovative mix of soft marshmallows, covered in a crispy coating and dipped in chocolate,



“In 2025, award-winning Bonds of London, which sold over 22m units in 2024², will celebrate its 130th anniversary”

available in strawberry or vanilla flavours, with an RRP of £2.50 for 100g.

World of Sweets is a one-stop-shop for the novelty category as exclusive distributors for Pez, Sweet Bandit, Warheads and Kidsmania, as well as its own-brand Crazy Candy Factory and Candy Realms. “Novelty is a must-have category for grocers this year,” notes Bradshaw. 2025 will see launches from Pez, including Stitch, Minecraft and Squishmallows. These collectibles are pocket money-priced, ideal for all ages.

Candy Realms will introduce nostalgic Candy Realms Candy Whistles and Lipsticks to sit alongside the Candy Watches and Necklaces, which launched in 2024. Value stays a key focus for World of Sweets. Price-marked packs (PMPs) like £1 Candy Realms and £1.25 Bonds provide retailers with high-margin options that attract budget-conscious consumers

“During this year retailers should expect to see the sugar confectionery market continue to grow, introducing new and exciting products, offering customers value and innovative flavours and textures,” says Bradshaw “Offering a varied product range to appeal across the ages will certainly give retailers a competitive edge. A good novelty range will appeal to younger shoppers, the Bonds range and its sweet shop favourites are classic treats for all ages, and the Sweet Vibes range will attract teenagers and young adults.”



Source

¹ Largest confectionery distributor in the UK, with £500m RSV sales
² Internal company data



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KEY BRANDS

**Baileys Chocolate
Collection**
Baileys Chocolate Truffles
Baileys Chocolate Nuts

↙ The winning combination of high brand recognition and affordable luxury has helped Baileys Chocolate deliver a standout 60% year-on-year growth¹, reveals Alison Robson, marketing manager for the brand.

“The unique flavours of rich chocolate blended with iconic Baileys Irish Cream provide retailers with a distinctive, adult-focused offering that has a real point of difference in the confectionery category,” she says.

“Baileys Chocolate’s seasonal and gifting-focused products further bolster its appeal, particularly during key gifting times like Christmas, Valentine’s Day and Easter. However, its commitment to innovation and evolution into new categories has really helped it remain relevant and strengthen its customer base.”

Building brand trust

Baileys Chocolate Original Truffles and Chocolate Salted Caramel Truffles form part of the brand’s year-round range, which are complemented by seasonal offerings to tap into key consumer occasions. The Assorted Truffle box, a special Christmas pack, features these core flavours alongside other truffle varieties such as Strawberries & Cream. “By offering both innovative new experiences and the quality shoppers expect from a trusted brand, Baileys Chocolate can generate new customers while retaining loyal ones,” notes Robson. “This strong sense of trust in Baileys Chocolate has been central in building long-term customer loyalty.

“We work hard to ensure our products deliver the indulgent, high-quality moments consumers want, but at an affordable price. Building that trust allows us to be playful when bringing out new products, and shoppers can be confident these will delight them, while guaranteeing consistently excellent quality.”

Nut category success

The Baileys Chocolate range of nuts has quickly been established as a standout success in the increasingly competitive nut category, adds Robson. “By combining two popular indulgent



“By offering both innovative experiences and the quality shoppers expect from a trusted brand, Baileys Chocolate can generate new customers while retaining loyal ones”

elements – chocolate and the distinctive flavour of Baileys Irish Cream – the products tap into the growing consumer trend for premium, indulgent snacks with a unique twist on the more traditional offering,” she says. “The brand’s strong association with luxury and indulgence also drives consumer confidence, ensuring interest and trial.”

Three nut products are currently in the year-round range, including Baileys Caramelised Nuts, Baileys Chocolate Peanuts and Cashews and Baileys Chocolate Almonds, with the latter two set to launch into Sainsbury’s in May. These are complemented by a seasonal Baileys Chocolate Nut Mix, which was crowned Champion – Crisps, Nuts & Bagged Snacks in The Grocer’s New Product & Packaging Awards 2024. The continued success of these products highlights the growing demand for premium, indulgent nut snacks in the market.

“This recent accolade reflects the success of that particular product and shines a light on the overall quality of the Baileys Chocolate range,” says Robson. “We constantly look to evolve into new treat and snacking occasions, keeping our offer fresh and exciting, so it is rewarding to have those efforts recognised both by our customers and the wider industry.”

Source

¹ Nielsen Discover IQ, Total Coverage Including Discounters, LIR Bailey’s Chocolate, 52 w/e 23.11.24 YA

* The Baileys word and associated logos are trademarks of R & A Bailey & Co and are used under licence



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Source: Nielsen Discover IQ, Total Coverage Including Discounters, LIR Baileys Chocolate, 52 Weeks To 25/11/24 YA

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*Circana All Outlets, Kids Sugar Confectionery – Client Defined, Value Sales, MAT 27/10/2024