

## Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“With myriad products competing to give consumers a mood-boosting sugar fix during times of uncertainty, compelling NPD will remain vital for players in the sweets market. Lower-sugar sweets, vegan sweets and premium sweets continue to offer a lot of potential.”

– **Emma Clifford, Associate Director – Food and Drink Research UK**

This report looks at the following areas:

- Huge potential in vegan sweets, but a need for more transparency around ingredients
- British ingredients can help to win over over-45s
- Brands and supermarkets can harness the ‘specialness’ associated with sweet shops

Even the demonisation of sugar has not suppressed the sweet tooth of UK consumers or dent demand for sugar confectionery. Value sales of sweets increased 2% year-on-year in 2019 to reach £1,507 million, while the rate of annual volume growth lagged slightly behind at 1.9%. Their undiminished popularity is underpinned by the status of sweets as an affordable, permissible and mood-boosting treat.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

- What you need to know
- Products covered in this Report

### Executive Summary

#### The market

Figure 1: UK retail sales of sugar and gum confectionery, by value, 2014-24

Sales growth in sweets accelerates in 2019

Value sales of gum continue to slump

Growth is set to endure

Tougher financial times could benefit the sweets market

Sweets fails to reduce sugar content over 2015-18, sparking calls for more 'nanny state' action

Ageing population continues to present a challenge

Companies and brands

Mixed performances in sweets, Skittles is the star performer

Figure 2: Leading brands' sales in the UK sweets market, by value, 2017/18 and 2018/19

Only Jakemans sees volume and value growth in medicated confectionery

Wrigley's unassailable lead in gum grows despite falling sales

A surge in sugar-free sweet launches

A rise in vegetarian and vegan claims

£25 million adspend in 2019; Wrigley and Haribo accounted for almost half

Haribo and Rowntree's have the strongest brand images

Figure 3: Attitudes towards and usage of selected brands, December 2019

#### The consumer

74% of adults eat sweets; gum only used by a quarter of consumers

Figure 4: Usage of sweets and gum, by age, October 2019

Gum enjoys ingrained usage

Figure 5: Frequency of usage of sweets and gum, October 2019

British ingredients can help to win over over-45s

Figure 6: Interest in sweets concepts, October 2019

Huge potential in vegan sweets, but a need for more transparency over ingredients

Figure 7: Behaviours relating to sweets, October 2019

Sweets benefit from mood-boosting associations; sweet shops create a special feel

Figure 8: Attitudes towards sweets, October 2019

Interest in gum with herbs/spices beyond mint is largely untapped

Figure 9: Behaviours relating to gum, October 2019

What we think

### Issues and Insights

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Huge potential in vegan sweets, but a need for more transparency around ingredients

The facts

The implications

British ingredients can help to win over over-45s

The facts

The implications

Brands and supermarkets can harness the 'specialness' associated with sweet shops

The facts

The implications

## The Market – What You Need to Know

Volume and value growth of sugar and gum confectionery picks up in 2019

Sales growth in sweets accelerates in 2019

Value sales of gum continue to slump

Growth is set to endure

Tougher financial times could benefit the sweets market

Sweets fails to reduce sugar content over 2015-18

Calls for more 'nanny state' action

Ongoing scepticism over artificial sweeteners

Ageing population continues to present a challenge

## Market Size and Forecast

Volume and value growth picks up in 2019

Figure 10: UK retail sales of sugar and gum confectionery, by value and volume, 2014-24

Sales growth in sweets accelerates in 2019

The emotional role of sweets is helping to buoy sales

Compelling NPD has been key to growth

Figure 11: UK retail sales of sugar and gum confectionery, by type, 2017-19

Value sales of gum continue to slump

Figure 12: UK retail sales of sugar and gum confectionery, by value, 2014-24

Figure 13: UK retail sales of sugar and gum confectionery, by volume, 2014-24

Growth is set to endure

Forecast methodology

## Market Drivers

Sugar remains in the spotlight in fight against obesity

Sweets fails to reduce sugar content over 2015-18

The effectiveness of 'sin taxes' is being reviewed

Calls for advertising and promotional regulations to tighten

Calls for a public transport snacking ban

Ongoing scepticism over artificial sweeteners

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

These concerns are a major obstacle for L/N/R sugar innovation

Political uncertainty is said to be having a "lipstick effect"

Margins are being squeezed

Ageing population continues to present a challenge

Figure 14: Trends in the age structure of the UK population, 2014-19 and 2019-24

## Companies and Brands – What You Need to Know

Mixed performances in sweets, with mounting pressure from smaller brands

Skittles is the star performer

Only Jakemans sees volume and value growth in medicated confectionery

Wrigley's unassailable lead in gum grows despite falling sales

A surge in sugar-free sweet launches

A rise in vegetarian and vegan claims

£25 million adspend in 2019; Wrigley and Haribo accounted for almost half

Haribo and Rowntree's have the strongest brand images

## Market Share

Mixed performances in sweets, with mounting pressure from smaller brands

Skittles is the star performer

Figure 15: Leading brands' sales and shares in the UK sweets market, by value and volume, 2017/18 and 2018/19

Only Jakemans sees volume and value growth in medicated confectionery

Figure 16: Leading brands' sales and shares in the UK medicated sweets market, by value and volume, 2017/18 and 2018/19

Wrigley's unassailable lead in gum grows despite falling sales

Starburst defies decline in gum

Figure 17: Leading brands' sales and shares in the UK gum market, by value and volume, 2017/18 and 2018/19

## Launch Activity and Innovation

A big NPD push from private label in 2019

Figure 18: Share of new product launches in the UK sugar and gum confectionery market, by brand and private label, 2015-19

A surge in sugar-free sweet launches

Figure 19: Sugar-free innovation from private label and Sulá, 2019

Chupa Chups takes a positively good for you approach in its latest sugar-free NPD

More high-profile launch activity in reduced sugar sweets

Figure 20: Share of new product launches in the UK sugar confectionery market, by claims relating to sugar content, 2015-19

Maynards Bassetts takes a positive nutrition angle with Superfruit Jellies

A rise in vegetarian and vegan claims

Figure 21: Share of new product launches in the UK sugar and gum confectionery market featuring vegetarian and vegan claims, 2015-19

Mentos continues to encourage people to connect

NPD taps into the appeal of retro sweets

Tangerine Confectionery puts a new spin on two of its retro classics

Brands continue to up the ante with sour flavours

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Innovation featuring sour flavours, 2019

Premiumisation trend continues

Growth in seasonal sweet launches

Figure 23: Seasonal innovation in fudge, 2019

A rise in marshmallows launches

Figure 24: Innovation in gourmet marshmallows from own-label, 2019

Figure 25: Share of new product launches in the UK sugar and gum confectionery market, by sub-segment, 2015-19

2019 see Skittles Dips enter the market, followed by Giants in 2020

Novelty innovation brings an on-trend fun factor to sweets

Figure 26: Innovation in sweets with novelty shapes, 2019

Skittles continues to support Pride through limited edition packs

## Advertising and Marketing Activity

£25 million adspend in 2019; Wrigley and Haribo accounted for almost half

New Time to Shine ad for Wrigley's Extra

Figure 27: Share of total above-the line, online display and direct mail advertising expenditure on sweets and gum, by advertiser, 2019

Mondelēz launches Give Me Strength social campaign for Trebor

Tangerine Company promotes its retro sweets

Swizzels promotes the 'Big Night In' with retailer competition

Figure 28: Swizzels Big Night Promotion in the Co-op, March 2020

TV loses spend

Figure 29: Total above-the-line, online display and direct mail advertising expenditure on sweets and gum, by media type, 2015-19

Nielsen Ad Intel coverage

## Brand Research

Brand map

Figure 30: Attitudes towards and usage of selected brands, December 2019

Key brand metrics

Figure 31: Key metrics for selected brands, December 2019

Brand attitudes: Rowntree's wins on trust and quality perceptions

Figure 32: Attitudes, by brand, December 2019

Brand personality: Haribo has the strongest fun factor

Figure 33: Brand personality – macro image, December 2019

Extra is seen as the most healthy brand, Haribo as the most unhealthy

Figure 34: Brand personality – micro image, December 2019

Brand analysis

Haribo stands out on being diverse

Figure 35: User profile of Haribo, December 2019

Rowntree's has a strong image as a traditional family brand

Figure 36: User profile of Rowntree's, December 2019

Maynards Bassetts struggles to set itself apart from Haribo and Rowntree's

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 37: User profile of Maynards Bassetts, December 2019

Brand commitment for Wrigley's Extra has slipped

Figure 38: User profile of Wrigley's Extra, December 2019

Low levels of brand commitment for Swizzels

Figure 39: User profile of Swizzels, December 2019

Trebor lacks standout and fun

Figure 40: User profile of Trebor, December 2019

## The Consumer – What You Need to Know

74% of adults eat sweets

Gum only used by a quarter of consumers

British ingredients can help to win over over-45s

Huge potential in vegan sweets, but a need for more transparency over ingredients

Sweets benefit from mood-boosting associations

Sweet shops create a special feel

Interest in gum with other herbs/spices is largely untapped

## Usage of Sweets and Gum

74% of adults eat sweets

Figure 41: Usage of sweets and gum, by age, October 2019

Men, Younger Millennials and parents with young kids are high-frequency users

Gum only used by a quarter of consumers

Usage is highest among young women and peaks among Gen Z

ABs are low users, but biodegradable, natural NPD appeals

Usage of gum is heavily ingrained among users

Figure 42: Frequency of usage of sweets and gum, October 2019

Mints remain the nation's favourites

Figure 43: Usage of sweets and gum, by type, October 2019

## Interest in Sweets Concepts

British ingredients can help to win over over-45s

Figure 44: Interest in sweets concepts, October 2019

Lots of interest in sweets which are good for dental health

Environmentally friendly packaging resonates among a third

## Behaviours Relating to Sweets

The vegan trend has bags of potential left in sweets

A need for more transparency around vegetarian sweets

Figure 45: Behaviours relating to sweets, October 2019

Large sharing bags seen to encourage overeating

Figure 46: BeTreatwise.net logo on Maynards Bassetts Super Fruit Jellies, 2020

Demand for packaging solutions which help consumers to moderate their consumption

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Sugar and Gum Confectionery - UK - March 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Scope for mainstream brands to add a more premium string to their bow

## Attitudes towards Sweets

Sweets benefit from mood-boosting associations...

Figure 47: Attitudes towards sweets, October 2019

...underpinning the market's resilience against sugar-related headwinds

Potential to build further on the "mood food" connection

Retro sweets strike a chord

The power of nostalgia can be used to greater effect

Sweet shops create a special feel

Supermarkets should inject some sweet shop magic into their sweet aisles

Figure 48: Agreement with statements on sweets, by usage of sweets, October 2019

## Behaviours and Attitudes Relating to Gum

Interest in gum with other herbs/spices is largely untapped

Figure 49: Behaviours relating to gum, October 2019

NPD in all-natural ingredients can boost usage

Figure 50: Attitudes towards gum, October 2019

Scope for more snack-inspired flavours in gum

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

## Appendix – Market Size and Forecast

Figure 51: Total UK retail value sales of sugar and gum confectionery, best- and worst-case forecast, 2019-24

Figure 52: Total UK retail volume sales of sugar and gum confectionery, best- and worst-case forecast, 2019-24

Forecast methodology

## Appendix – Market Share

Figure 53: Leading brands' sales and shares in the UK sweets market, by value and volume, 2017/18 and 2018/19

Figure 54: Leading brands' sales and shares in the UK medicated sweets market, by value and volume, 2017/18 and 2018/19

Figure 55: Leading manufacturers' sales and shares in the UK gum market, by value and volume, 2017/18 and 2018/19

## Appendix – Launch Activity and Innovation

Figure 56: Share of new product launches in the UK sugar and gum confectionery market, by company, 2015-19

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)