

North America Edition

TOP CHOCOLATE CONFECTIONERY TRENDS

2026 & Beyond



INTRODUCING THE TOP CHOCOLATE CONFECTIONERY TRENDS

Chocolate confectionery is experiencing market polarization in North America. While brands feel the pressure to prioritize affordability to appeal to price-sensitive consumers, there is also an opportunity to elevate products by tapping into consumers' growing desire for healthy inclusions and emotive experiences. In either case, brands must place purpose at the heart of product creation.

Price

Consumers in North America are looking for innovation that enhances the value and experience chocolate confectionery can offer. Although some consumers are trading down on their chocolate for affordability, more premium applications and beneficial add-ons are also experiencing growth as consumers are willing to splurge on confectionery that delivers on their needs for healthy and exciting formulations.

From independent artisans to large-scale food manufacturers, chocolate makers have the opportunity to go much further to premiumize products that resonate with consumers' evolving needs.

People

Compared to other regions, consumers across North America are highly nostalgic and health-conscious,

responding strongly to flavors and formats that remind them of their childhood and help them achieve wellness goals. As health-consciousness evolves in the region, there is a growing opportunity to capitalize on the continuing demand for healthy snacks and emerging need for GLP-1 support and mood-boosting ingredients. To appeal, innovators of today and tomorrow must elevate their value proposition by adding new hybrid inclusions that speak to these evolving emotive and health needs, without compromising on price or experience.

Purpose

At its core, chocolate is about indulgence. But brands also need to define a wider purpose, underpinned by a sustainable supply chain that supports farmers and the environment. Purpose should be built in from the start, while trend-led innovation should connect to people's evolving needs and help justify the value expectations that come with higher price points.



Callebaut

To help you navigate the chocolate market polarization and place price, people and purpose at the cent of innovation, discover the top chocolate trends forecasted for 2026 and beyond. Become Masters of Taste by exploring the sentiments and strategies that will influence purchasing decisions in North America and drive regional industry growth.

THE TOP CHOCOLATE CONFECTIONERY TRENDS IN NORTH AMERICA

01 'MINORSTONE' CONFECTIONERY



02 CHOCOLATE NOSTALGIA



03 NEW WORLD CHOCOLATE



04 LOW & NO CONFECTIONERY



05 NUTRITION- BOOSTED BITES



06 SELF-CARE TREATS



07 SENSORIAL CONFECTIONERY



08 NEW CHOCOLATE CONNOISSEURS



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'MINORSTONE' CONFECTIONERY

Consumers are redefining the meaning of celebration by broadening its scope. No longer are traditional life milestones, such as marriage or having children, stealing the limelight. Today, consumers are celebrating smaller, more personal, but equally important achievements — or 'minorstones' — such as professional successes. As a result, they will increasingly seek confectionery that facilitates or celebrates alternative occasions and social gatherings.

From

Feeling limited by traditional life milestones and societal expectations

To

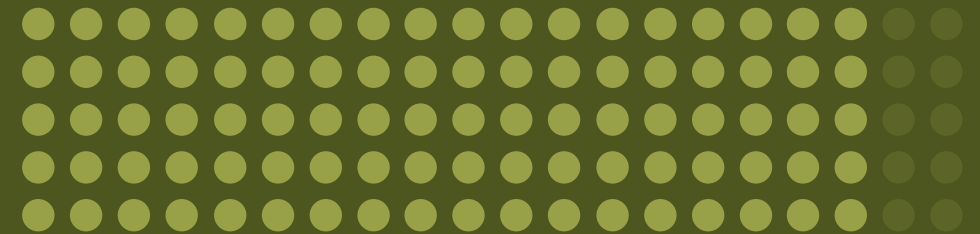
Finding new occasions to celebrate and indulge



Pexels | Jonathan Borba

“In my mind, indulgence is associated with things that you celebrate. So it could be a promotion in the office or maybe a result, an examination that you wrote and you fared well. How you celebrate that, is indulgence for me.”

Callebaut x WGSN Global Consumer Study, 2025



90%

of North America consumers enjoy celebrating smaller or non-traditional milestones with friends and family.

Callebaut x WGSN Global Consumer Survey (North America), 2025

LOW & NO CONFECTIONERY

Consumers are growing more mindful of the impact of sugar and ultra-processed foods on their health. They increasingly demand confectionery that aligns with health and wellness goals, but does not compromise on indulgence and pleasure. Global palates are also shifting towards treats that are less sweet and more complex, leading confectionery makers to use fewer, fresher and more nuanced ingredients.

From

Restrictive diets focused on sugar replacements that compromise on taste

To

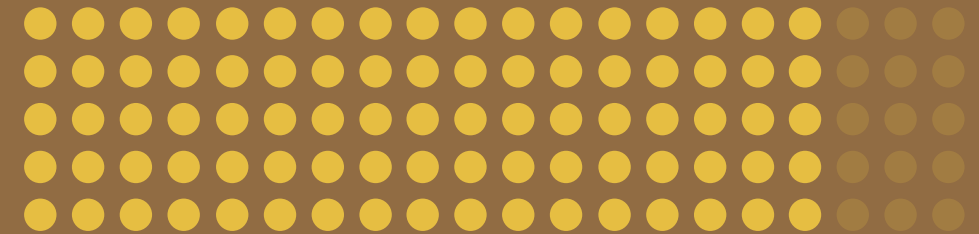
Rewarding treats with fewer ingredients, moderate sugar content or healthy alternatives



Pexels | Jonathan Borba

“If you look back at the old recipe books, the amount of sugar that they had versus the amount of sugar we use now is vastly different. I think **tastes have become less sweet**, and the trends and our recipes reflect that.”

Alistair Birt, Chef



85%

of consumers look for shorter ingredient lists when buying chocolate confectionery.

Callebaut x WGSN Global Consumer Survey (North America), 2025



NUTRITION-BOOSTED BITES

Fueled by a growing focus on health and rapid uptake of GLP-1, a medication for weight loss and diabetes, consumers want snacks that balance convenience, health and taste. The answer? Mini and bite-sized confectionery formats that are flavor-rich and nutrient-dense, with added ingredients that tackle everything from energy to gut health.

From

Indulgences in large portions

To

Mini and bite-sized treats that are nutrient-dense, offering targeted wellness in satisfying formats



Pexels | Anete Lusina

“The number one thing is **portion size**, as consumers know that they can tolerate a little bit. **Sugar alternatives** or **less sugar** still make chocolate taste good, and **nutritional benefits** can be added through ingredients like fiber instead of sugar.”

Kim Ross, Nutritionist



58%

of consumers are interested in chocolate confectionery that suits their diet when taking GLP-1 diet medications.

Callebaut x WGSN
Global Consumer Survey (North America), 2025

SENSORIAL CONFECTIONERY

Evolving from 'instagrammable' treats, sensorial confectionery is soaring in popularity, as consumers look for novel experiences in food that elicit excitement and defy expectations. While presentation still delivers visually 'for the gram', consumers are becoming more discerning with taste, prompting innovators to experiment with stimulating textures and unexpected flavors in traditional confectionery.

From

Over-the-top treats that look good 'for the gram'

To

Hyper-sensorial confectionery that defies visual, taste and textural expectations



Callebaut



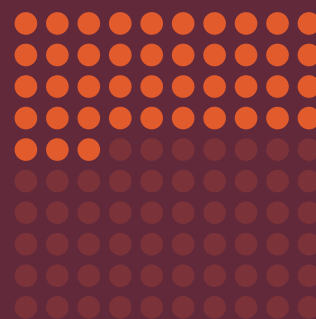
47%

of consumers also find chocolates that blend sweet and savory flavors very relevant to them.

Callebaut x WGSN Global Consumer Survey (North America), 2025

“Things are getting **more adventurous** with the different flavors. Everything's getting **bigger and more dramatic**. People need something extra.”

Callebaut x WGSN Global Consumer Study, 2025



43%

of consumers are interested in chocolate confectionery that has a surprising or unexpected texture, rising to 60% amongst trend-forward Early Adopter consumers.

Callebaut x WGSN Global Consumer Survey (North America), 2025

BECOME MASTERS OF TASTE

Today's consumers are looking for connection, cultural discovery, moments of wellness, and small indulgences in their daily lives — and confectionery can help to satisfy these desires.

For brands, this presents an opportunity to craft chocolate that surprises and delights — from playful formats and inventive flavors to treats that celebrate heritage, support mindful choices, and create moments worth savoring.

Even as cocoa prices fluctuate, placing people and purpose at the heart of innovation allows brands to create compelling, value-driven products that resonate emotionally and sensorially. From 'Minorstone' Confectionery to New Chocolate Connoisseurs, the trends outlined are just the start of an exciting journey in chocolate innovation.

To help you turn these insights into a tailored strategy for your brand and create products and experiences that captivate consumers and drive growth, **contact Callebaut at www.callebaut.com.**



FORECASTING THE TRENDS

The Top Chocolate Confectionery Trends 2026 & Beyond white paper is a collaboration between Callebaut and WGSN, the world's leading trend forecasting agency.

Our comprehensive research into the top chocolate trends is the culmination of quantitative and qualitative data sources, analyzed by trend experts at WGSN.

Sources include

Consumer Survey

An online survey spanning 24 markets and 24,000 consumers was conducted in September 2025. For this white paper, the data was filtered to global consumers who have purchased chocolate confectionery in the last 12 months.

Consumer Diaries

Qualitative diaries collected from consumers in the United States, Brazil, India, and the United Kingdom.

Expert Interviews

Interviews with 20 chefs and experts in the food & drink industry across 13 markets.

Search Data

Open source data from Google Trends was analyzed to identify trending ingredients and formats based on search volume growth (from October 2023 to September 2025).

WGSN Social Data:

Food & Drink Signal Map

WGSN's Social Data was leveraged to identify growing keywords and ingredients related to confectionery. WGSN's proprietary Food & Drink Signal Map tracks 4000+ curated food influencers globally to identify new topics within food & drink.

WGSN Proprietary Trend Intelligence & Secondary Research

WGSN's consumer and food & drink forecasts are produced by industry experts and published on [wgsn.com](https://www.wgsn.com), informing the future-focused insights in the report, and was enriched with bespoke secondary research.

Trend Scans

Global and market-level signals of change and innovator case studies were collected and analyzed by local trend experts.



DISCOVER MORE

This report covers 4 key chocolate confectionery trends in North America. Reach out to our sales team today to discover all 8 Top Chocolate Confectionery Trends of 2026 & beyond, must-know case studies and confectionery concepts of the future.

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