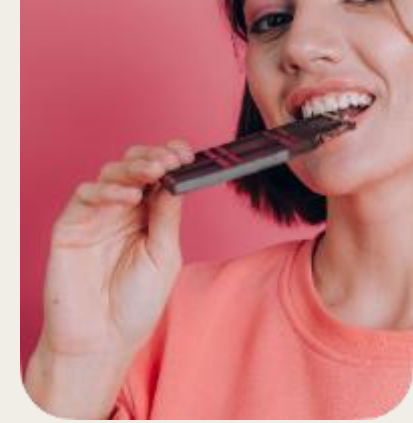


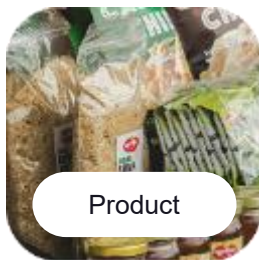
# TOP F&B TRENDS 2026 IN EUROPE



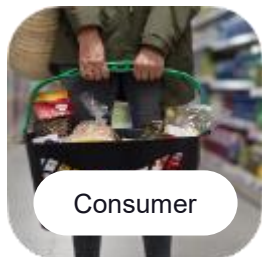
# INNOVA: INSIGHTS PARTNER FOR INNOVATION



Category



Product



Consumer

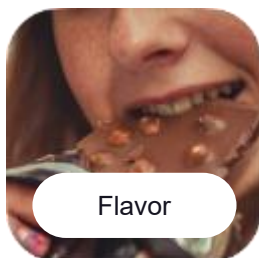
## INSIGHTS 360°



Ingredient



Packaging



Flavor

# 30+

Years of Trends  
and Insights

# 90%

of Innovation Captured,  
Globally

# 200M

Records

# CPG

Specialist

# BIG

Time-Saver

# 90+

Countries

# AI-

Enhanced  
Platform



# INSPIRE INNOVATION

## DRIVE GROWTH



# Trend 1

# POWERHOUSE PROTEIN



# TREND 1 POWERHOUSE PROTEIN

- Protein plus
- High absorption
- Weight control

Protein remains a wellness powerhouse; consumers are seeking it for overall health in various formats and occasions.

Sources: Innova Trends Survey 2026 (Average of 4 countries: Germany, France, Spain, UK), Innova Database

Notes: Q1: "Are you actively including or reducing the following components in your diet?" – Protein. Q2: "Have you controlled your protein intake to improve the following physical health areas in the past 12 months?" Q3: "Have you controlled your protein intake to improve the following mental health areas in the past 12 months?" \*All health active claims, antioxidants and high/source of fiber

1 in 2

European consumers say:

I actively include **more protein** in my diet.

+22%

Growth in new F&B launches tracked featuring **protein and at least one health\* claim**

Europe, YoY, 2025 vs. 2024



Contains **20g of protein** per bottle. Protein contributes to the **maintenance and growth of muscle mass**. In collaboration with Olympiatoppen.

# TREND 1 POWERHOUSE PROTEIN

Opportunity ahead: Weight management in protein innovation.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Note: Q: "Have you controlled your protein intake to improve the following physical health areas in the past 12 months?"

Top Trends  
Top F&B Trends 2026 in Europe

“ I managed my **protein intake** to improve the following aspects:

European consumers



Sport performance/recovery (78%)



**Weight (76%)**



Muscle wasting (75%)

“ Full meal for a **balanced weight loss**. Bodylab Diet Shake is composed of several essential vitamins and minerals, dietary fiber, fatty acids, and protein, which together provide you a **complete meal**.

— Bodylab



FULL MEAL FOR A BALANCED WEIGHT LOSS\*

Denmark, Jul 2025

Market opportunity

Only **5%**

of new F&B launches tracked with **protein claims** also feature **weight management claims**

Europe, 2025

Emerging

**+107%** ↑

Growth in new F&B launches tracked with **protein and weight management claims**

Europe, YoY, 2025 vs. 2024

# Trend 2

# GUT HEALTH HUB



## TREND 2 GUT HEALTH HUB

Gut first

Fiber

Microbiome

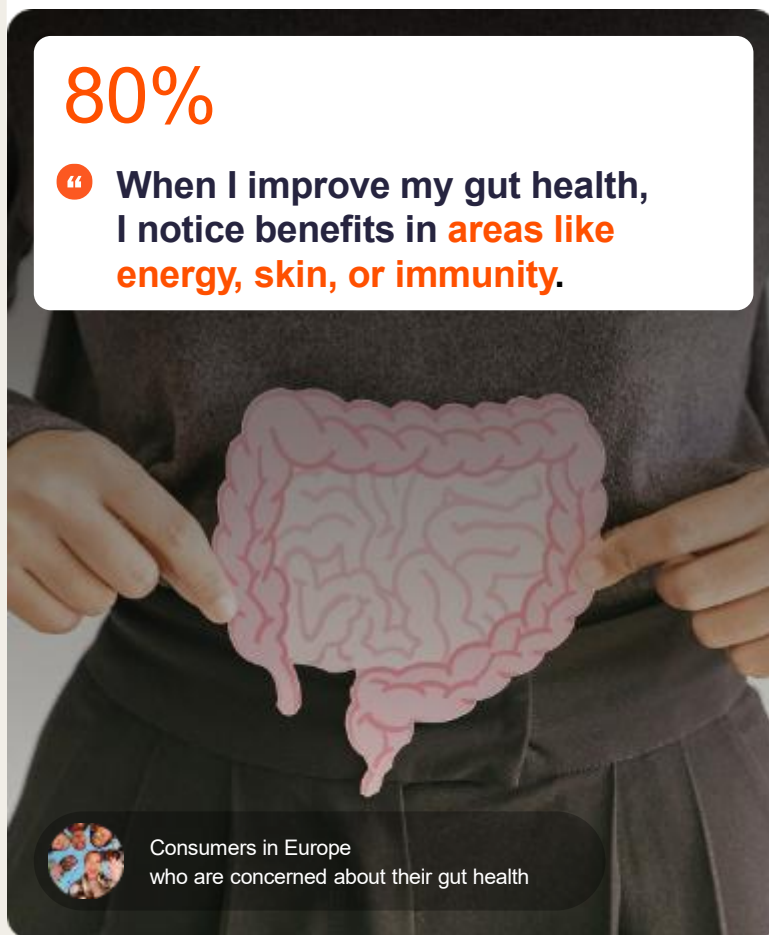
Consumers increasingly see gut health as the gateway to holistic wellness, sparking demand for benefits across body and mind.

87% of Europeans agree

“ Gut health is very important for my **whole body**.”

80%

“ When I improve my gut health, I notice benefits in **areas like energy, skin, or immunity**.”



Consumers in Europe who are concerned about their gut health

+52%

Growth in new F&B launches tracked with **gut/digestive health claims**

Europe, YoY, 2025 vs. 2024



Fresh and mild. Digestive wellbeing and **immunity**.

France, Oct 2025



**Energy-boosting probiotic drink** with 65 billion friendly bacteria in a bottle.

Czech Republic, May 2025

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q: "To what extent do you agree with the following statements?" % of consumers who answered "agree" & "strongly agree"

## TREND 2 GUT HEALTH HUB

European consumers see a strong connection between gut health, weight, and stress.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: DGE = Deutsche Gesellschaft für Ernährung = German Nutrition Society. Q: "Which of these physical/mental health aspects do you think are related to gut health?" (Select all that apply)

Top Trends  
Top F&B Trends 2026 in Europe

“Top **physical health aspect** related to gut health”



“Top **mental health aspect** related to gut health”



Health benefits – the DGE facts about dietary fiber: **Weight management:** Dietary fiber promotes satiety and **helps maintain or reduce body weight.** **Gut health:** dietary fiber supports digestion and the **microbiome.**

🌐 Germany, Nov 2025

European consumers who are concerned about their gut health

**WEIGHT  
MANAGEMENT  
& IMMUNE  
STRENGTH**

54%

**STRESS  
RELIEF**

49%

**SLEEP QUALITY**

**BETTER  
SLEEP**

**ENERGY LEVELS**

**EASING ANXIETY &  
BOOSTING ENERGY**



Organic ashwagandha (*Withania somnifera*), a traditional adaptogen that **supports stress resistance and internal balance.** *Lactobacillus acidophilus* and *Lactiplantibacillus plantarum* probiotics contributing to **healthy intestinal microflora.**

🌐 Czech Republic, Jul 2025

# Trend 3

## LAYERS OF DELIGHT



## TREND 3 LAYERS OF DELIGHT

Multisensory

Mood-boosting

Texture play

Indulgence is evolving into a multidimensional experience, elevating the moment and mood, and combining sensory richness with wellbeing.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q: "What does an indulgent food or drink experience mean to you?" (Select all that apply) – 37% of consumers say "a comforting moment"; 30% say "rich sensory enjoyment"; 29% say "something that improves my mood"; 28% say "a healthier enjoyment"

Top Trends

Top F&B Trends 2026 in Europe

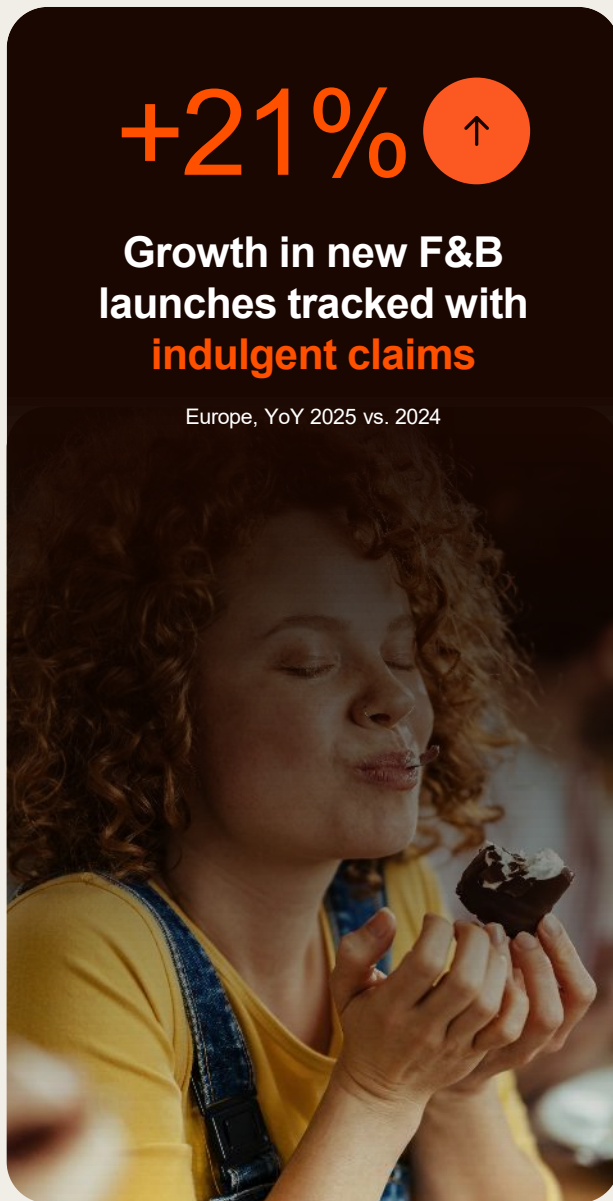
European consumers  
4 pillars of indulgence



+21%

Growth in new F&B launches tracked with indulgent claims

Europe, YoY 2025 vs. 2024



“ Comforting moments (37%)



Unwind. Calm and balanced.

United Kingdom, Aug 2025

“ Rich sensory enjoyment (30%)



Indulge in the irresistible taste of KP Signature jumbo roasted cashews, deliciously crafted with a sea salt and rosemary seasoning.

United Kingdom, Oct 2025

“ Mood-enhancing (29%)



Give yourself a moment of joy with this organic popcorn that will bring mood and flavor to your every day.

Bulgaria, Oct 2025

“ Healthier enjoyment (28%)



Healthier snacking: It is organic and uses coloring concentrates from natural origins.

Germany, Jun 2025

## TREND 3 LAYERS OF DELIGHT

Both familiar sensations and novel inventions win indulgence seekers.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q: "To what extent do you agree with the following statements?" % of consumers who answered "agree" & "strongly agree." Indulgent F&B categories include confectionery, bakery, desserts & ice cream, snacks, soft drinks

Top Trends  
Top F&B Trends 2026 in Europe

53%

European consumers

I want to **explore new things** when I try to indulge.

40%

European consumers

I always **go for the same option** when I try to indulge.



Trolli x Mountain Dew Sour Brite Crawlers feature **three bold flavor combinations** in every bag.

United Kingdom, Oct 2025



+45%

Indulgent F&B launches tracked with a **new experience claim**

Europe, YoY, 2025 vs. 2024

+56%

Indulgent F&B launches tracked with a **comfort claim**

Europe, YoY, 2025 vs. 2024



**Original recipe since 1933.**  
Handmade in Belgium.  
**Authentic artisan chocolate.**

Belgium, Aug 2025



# Trend 4

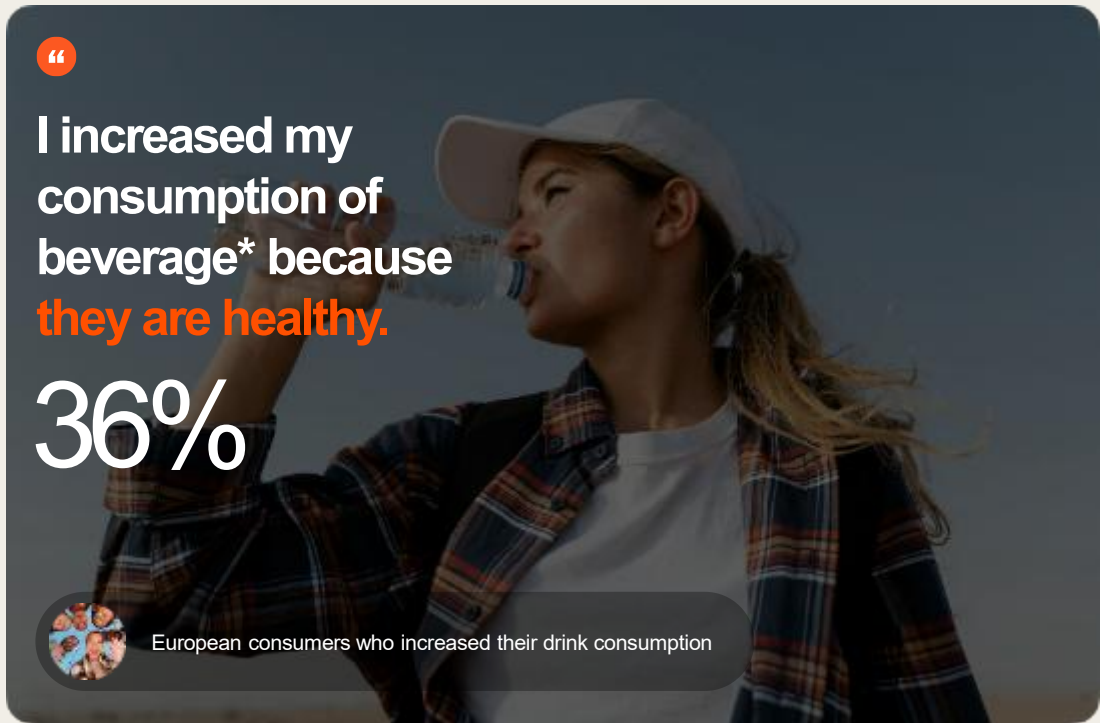
## BEVERAGES WITH PURPOSE



## TREND 4 BEVERAGES WITH PURPOSE

Liquid innovation Hydration Prebiotics

Beverages are leading innovation in wellness, with products tailored for hydration, convenience, and functionality.



European consumers who increased their drink consumption

### Top health claims\*\* in beverages

European consumers



21%

Low/no/reduced sugar

19%

Made with real ingredients/natural

16%

Vitamin/mineral fortified

10%

High/source of protein

Sugar reduction	23%
No additives/preservatives	12%
Vitamins/minerals	7%
High protein	5%

of new beverage launches\* tracked with selected claims

Europe, 2025



15.4g of protein. Packed with 27 vitamins and minerals. High fiber and low sugar.

Ireland, Jun 2025

Sources: Innova Category Survey 2025 (Europe is the average of 11 countries: Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, Poland, Spain, Sweden, UK), Innova Database

Notes: Q1: "Why have you increased your consumption of ...?" Q2: "Which claims most influence your purchasing decision when buying ...?" \*Beverage categories are: Soft drinks, hot coffee, hot tea, drinking yogurt/fermented beverages, dairy alternative drinks. \*\*Health claims include reduced claims (sugar/fat/salt, etc.) or added benefit claims

# TREND 4 BEVERAGES WITH PURPOSE

Health and indulgence are inseparable elements in beverage innovation.

Sources: Innova Snacking Survey 2025 (Average of 4 countries), Innova Database

Notes: Q: "Which snack categories do you associate with the following types of snacks?" – Healthy, Indulgent

Drinks that are perceived as a **“healthy snack”**



Power, refreshment and **immunity** for your everyday life.  
**With zinc and vitamin C. Low sugar.**

Finland, Nov 2025



European consumers

Drinks that are perceived as an **“indulgent snack”**



**Soda with benefits**

Prebiotics

Botanicals

Plant fiber

United Kingdom, Jul 2025

**+8%**

Growth in beverage launches with a **prebiotic** or **probiotic claim**

Europe, CAGR 2021-2025



Dairy-based drinks

70%



30%

Juices & smoothies

65%



35%

Hot drinks

61%



39%

Carbonates & energy drinks

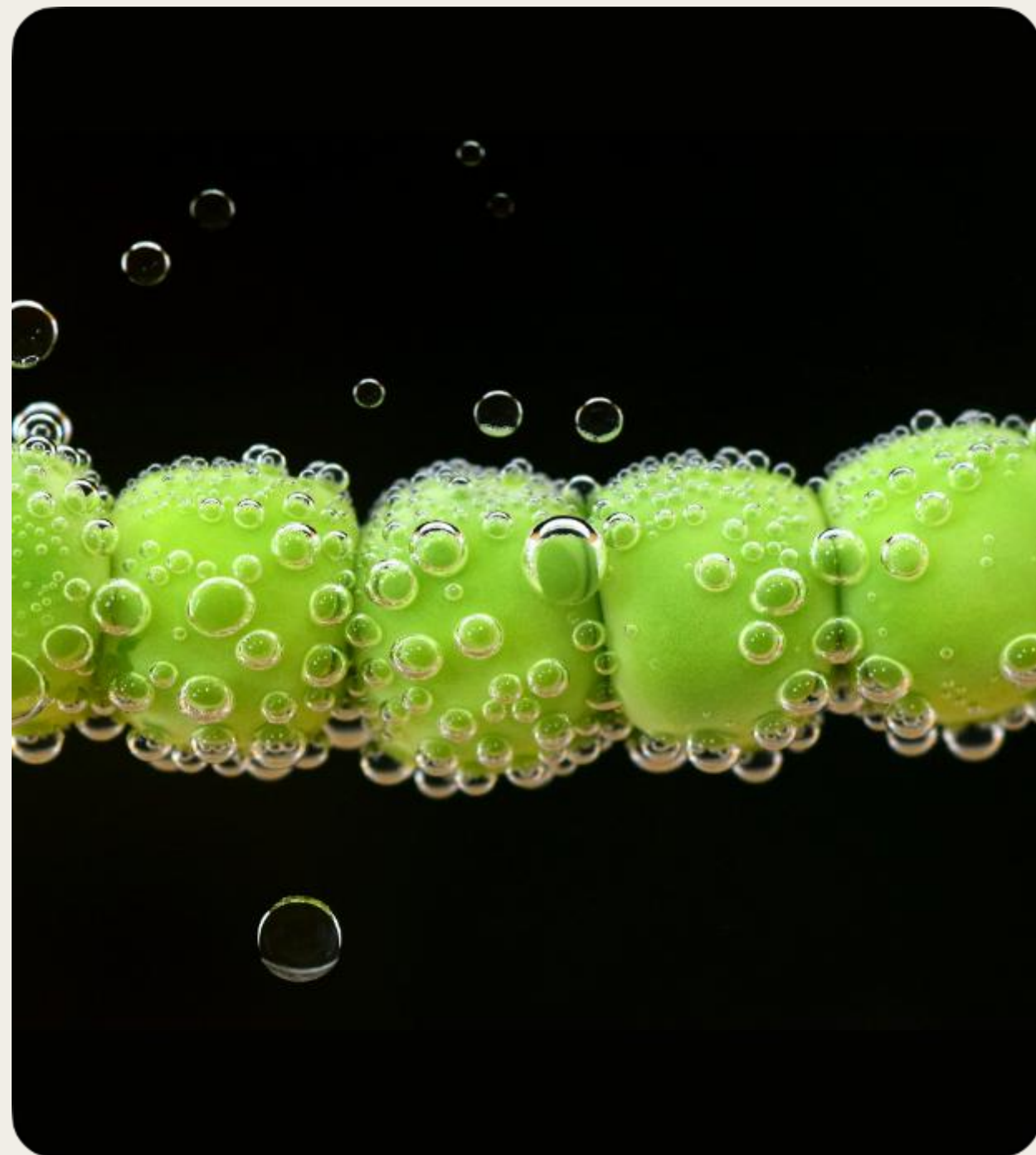
29%



71%

# Trend 5

## AUTHENTIC PLANT-BASED



## TREND 5 AUTHENTIC PLANT-BASED

Alternative protein    Natural    Back to plants

Plant-based is shifting from imitation to nutrition, with consumers embracing natural plant protein for its added benefits.

Sources: Innova Trends Survey 2025 (Average of 4 countries), Innova Dairy, Meat & Plant-based Alternatives Survey 2025 (Average of 4 countries), Innova Database

Notes: Q1: "To what extent do you agree with the following statements?" % of consumers who answered "agree" & "strongly agree." Q2: "Which of the following do you consider to be a plant-based food or drink?" (Select all that apply)

Top Trends  
Top F&B Trends 2026 in Europe

52%

European consumers agree that:

Plant-based products should be standalone products (not alternatives).



Protein-rich. Palm oil free.  
100% plant based. Made with high-quality wheat and pea protein. It's a healthy snack and is captivated by its hearty flavor.

Austria, Aug 2025

What do consumers consider plant-based?

European consumers

1. Vegetables & fruits
2. Nuts & seeds
3. Legumes



Hak Protein Bowl Jackfruit Rendang With Orzo is a protein-rich meal with no less than 35 grams of protein.

Netherlands, Feb 2025

## TREND 5 AUTHENTIC PLANT-BASED

Fiber is a big health-related selling point for plant-based products.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Note: Q: "Previously, you indicated that you have chosen protein from plant-based sources to meet your protein needs. Why do you choose plant-based sources to meet your protein needs?" (Select all that apply)

Top Trends  
Top F&B Trends 2026 in Europe

### Reasons for choosing plant-based protein

European consumers who consume plant-based protein

“ It is easy to digest.

“ It feels natural.

“ It offers additional health benefits (e.g., fiber, antioxidants).

### Share of new plant-based/vegan F&B launches tracked with the following claims

Europe, 2025

15% High/source of fiber

7% Natural

2% Digestive health



United Kingdom, Oct 2025



Plant-based protein instant oatmeal with the classic taste of apple and cinnamon. Made with natural ingredients.

At only 114 calories per pack, these snacks are high in fiber and completely plant-powered.

100% PLANT POWERED



Denmark, Nov 2025

# Trend 6

## MADE FOR MOMENTS



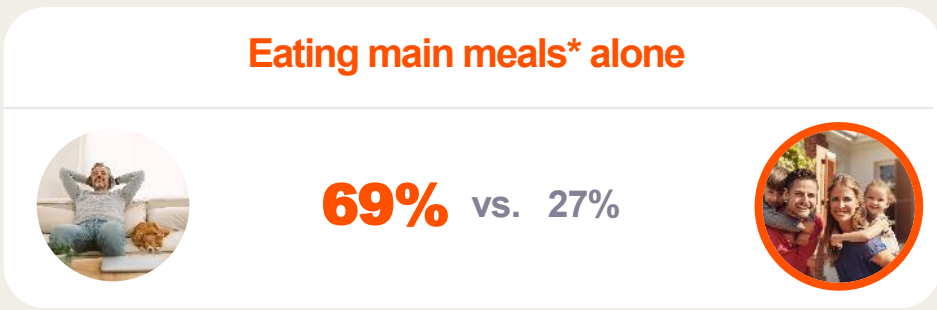
## TREND 6 MADE FOR MOMENTS

Occasions Snacking Convenient formats

Occasion-based innovation is expanding through diverse formats in snacks, fresh meals, and single-serve offerings.

Sources: Innova Lifestyles & Attitudes F&B Survey 2020 and 2025 (Average of 4 countries), Innova Database

Notes: Q1: "Please specify your household composition." pp = percentage points. Q2: "How do you spend your time on the following eating occasions usually?" \*Main meals are the average of breakfast, lunch, and dinner




**Individual** Chicken Cooked With Corbieres Wine Sauce, Pasta And Vegetables

France, Sep 2025

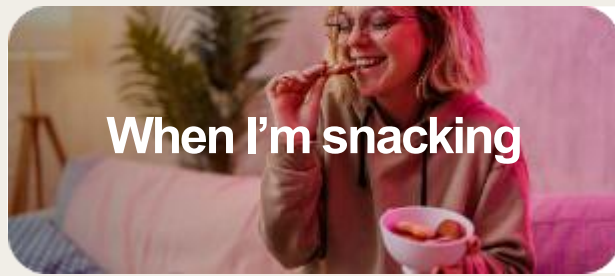



Rich in protein. Extra crispy breading. **Family pack.**

Sweden, Oct 2025

## TREND 6 MADE FOR MOMENTS

Diverse snacking needs are driving innovation across different occasions.



When I'm snacking

48%

“  
People from single households  
**Snack alone**

41%

“  
Couples with children  
**Snack with others**

Among the surveyed population in Europe

### Snacks for enjoyment



Ideal as a **snack for social evenings, movie nights, or simply anytime** – these chips bring variety and full flavor to every snack break.

🌐 Germany, Nov 2025

### Snacks for function



**Brain-boosting** apricots. **Immunity boost** mangoes. Your Monday-to-Friday **nutritional rescue**.

🌐 United Kingdom, Sep 2025

### Snacks for sharing



These are **ideal for sharing on various occasions**, whether it's a party or just for fun.

🌐 Czech Republic, Nov 2025

Sources: Innova Lifestyles & Attitudes F&B Survey 2025 (Average of 4 countries), Innova Database

Note: Q1: "How do you spend your time on the following eating occasions usually?" - When snacking

# Trend 7

## WORTH EVERY BITE



## TREND 7 WORTH EVERY BITE

Affordable

Simple food

Value eating

With economic pressures rising, affordability and accessibility are becoming key drivers of loyalty and choice.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q1: "Which are the most important values to you in your diet?" Q2: "In what ways have recent global uncertainties (e.g., economic instability, world events, health crises) influenced your food and drink choices?"

Top Trends  
Top F&B Trends 2026 in Europe

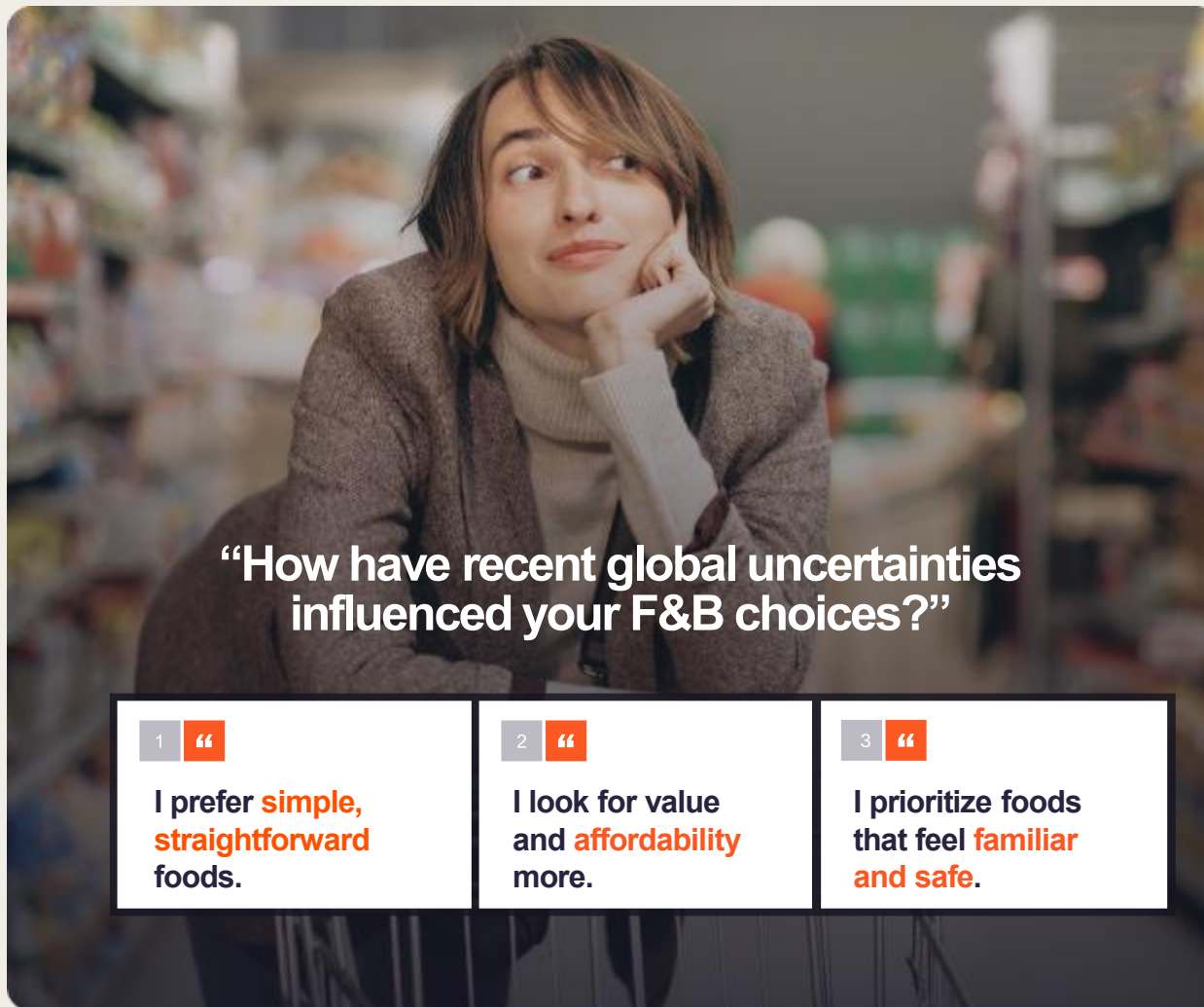


# 1 in 3

European consumers say:

“

**Ensuring food is accessible and affordable for all is the most important value of my diet.**



“How have recent global uncertainties influenced your F&B choices?”

1

“

I prefer **simple, straightforward** foods.

2

“

I look for **value and affordability** more.

3

“

I prioritize foods that feel **familiar and safe.**



**Value for money**  
everyday.

🌐 Denmark, Feb 2025

# TREND 7 WORTH EVERY BITE

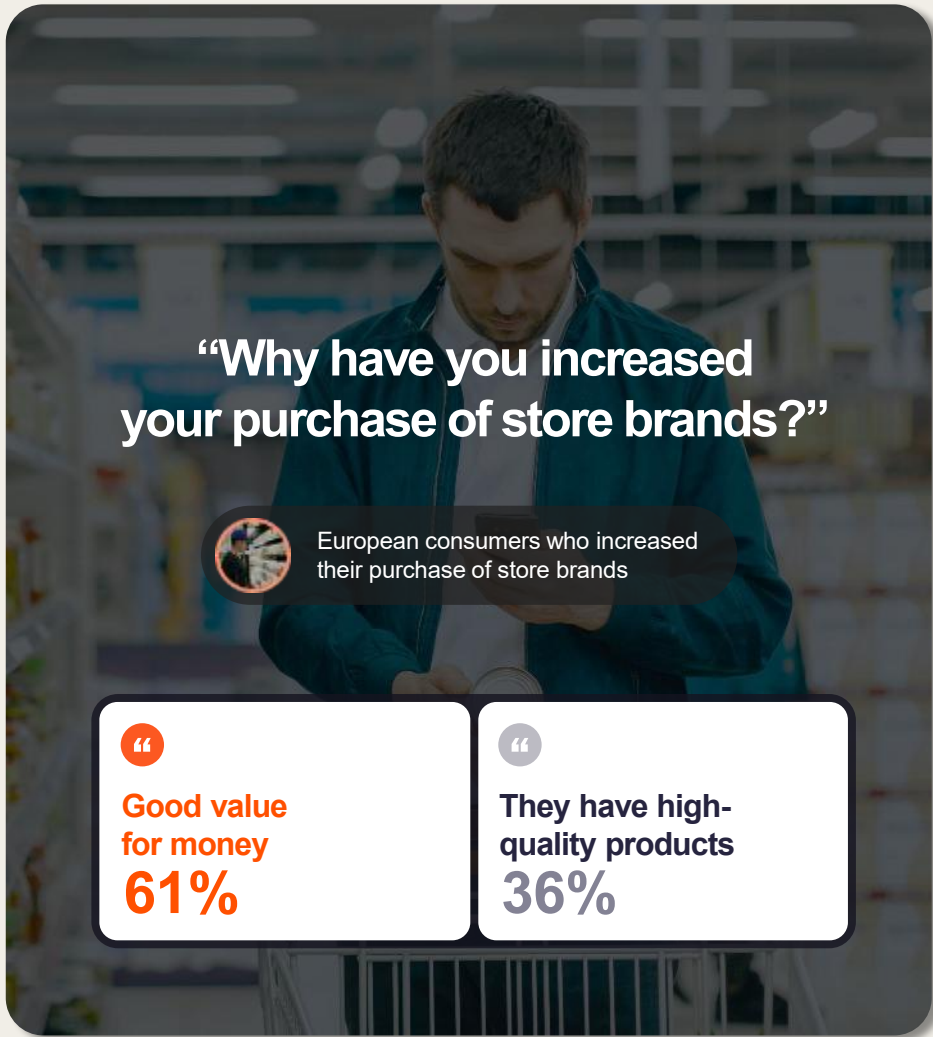
Private label continues to be a strong solution.

25%

“ European consumers say:  
**I have increased the purchase of private labels**  
(vs. 9% who say decreased)

+2%

**Growth in new F&B launches tracked with a private label**  
Europe, CAGR, 2021-2025



“Why have you increased your purchase of store brands?”

European consumers who increased their purchase of store brands

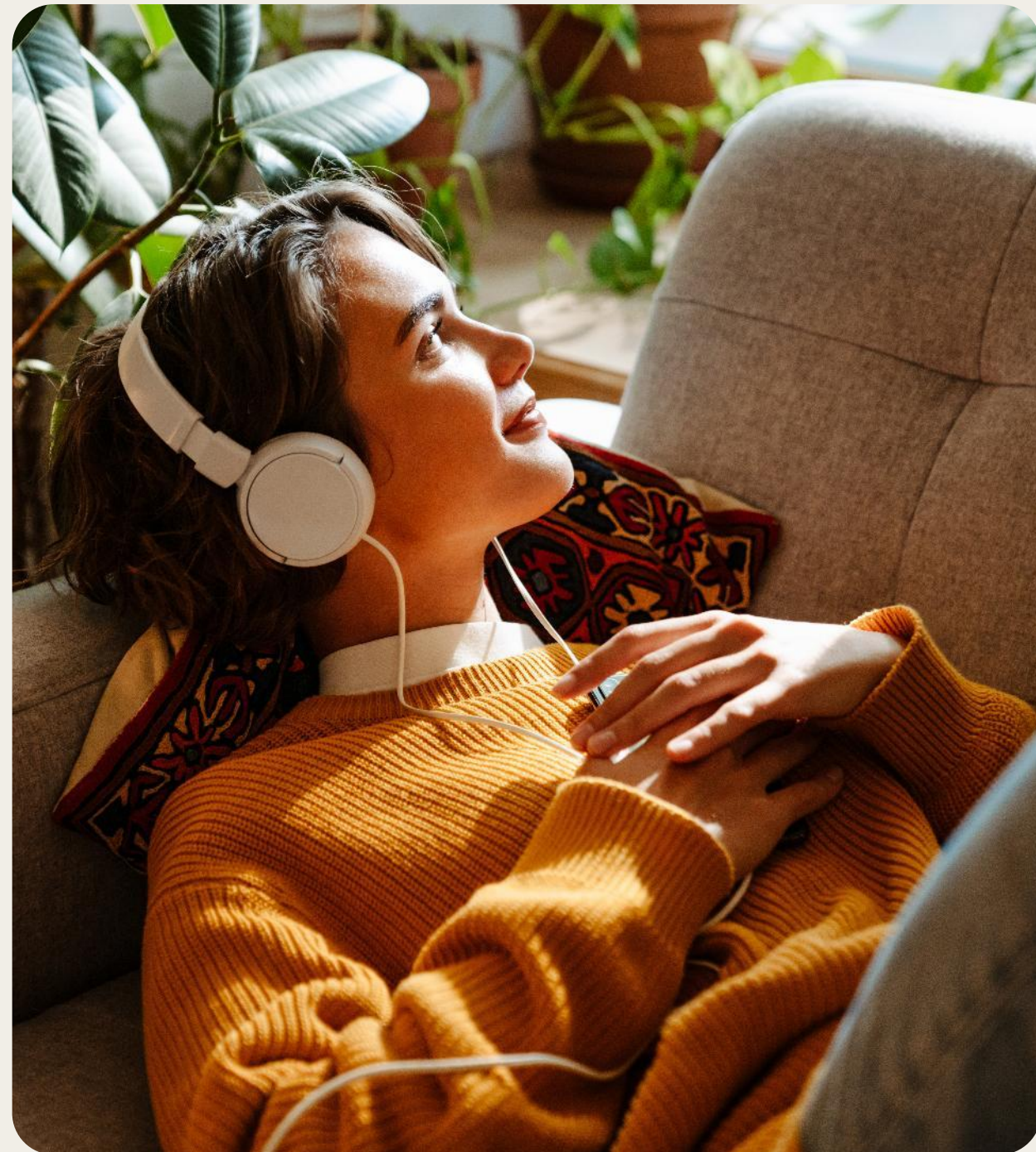
<p>“</p> <p><b>Good value for money</b></p> <p><b>61%</b></p>	<p>“</p> <p><b>They have high-quality products</b></p> <p><b>36%</b></p>
---	--



ICA Basic is our **cheapest own goods.**

# Trend 8

## MIND BALANCE



# TREND 8 MIND BALANCE

- Mental health
- Stress relief
- Energy boost

Mental wellbeing is a rising priority as consumers turn to natural F&B for energy, stress relief, and brain health.

Sources: Innova Health & Nutrition Survey 2025 (Average of 4 countries), Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q1: "How concerned are you about the following health aspects for yourself?" – Mental (stress, anxiety, etc.). Q2: "What parts of your mental health have you tried to improve in the past 12 months?" Q3: "What have you used to improve each mental health area below in the past 12 months?" The F&B ranking is based on % of "Regular food and drinks" + "Nutritional fortified food and drinks"

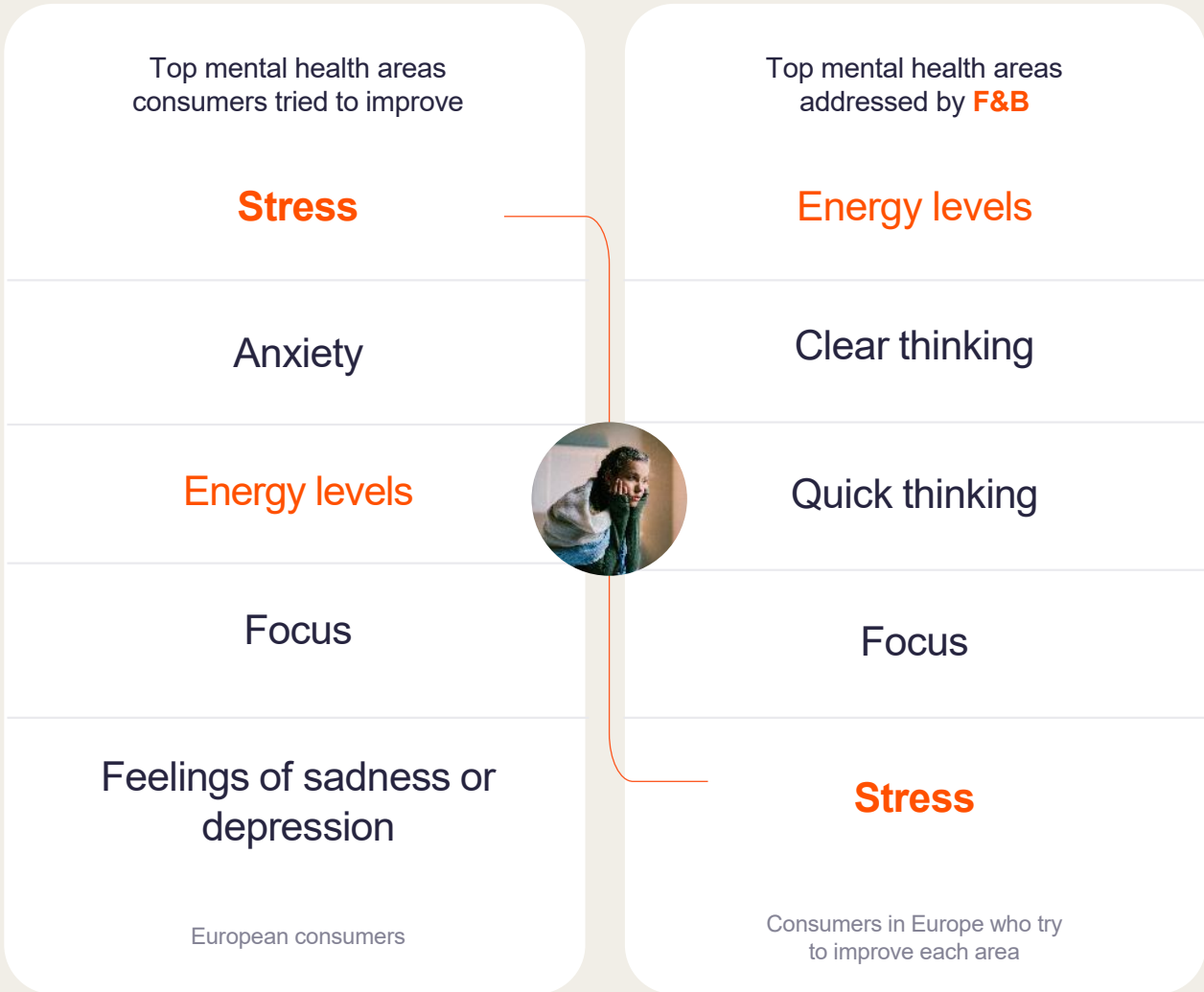
Top Trends  
Top F&B Trends 2026 in Europe



# 54%

Generation Z and Millennials in Europe say:

“ I am very concerned about my **mental health**.”



The high potassium content reduces the level of cortisol, the stress hormone, so it **reduces the occurrence of some stress-related diseases**.

🌐 Croatia, Feb 2025

## TREND 8 MIND BALANCE

Comfort food and drink help ease stress and rekindle joy.

Sources: Innova Snacking Survey 2025 (Average of 4 countries), Innova Database

Note: Q: "What emotions trigger you to consume the following snacks?" – "Comfort" and "Happiness"

Top Trends  
Top F&B Trends 2026 in Europe

“

I seek **comfort** in the following snacks.

European consumers who consume the following categories:

1

Hot drinks  
(e.g., coffee, tea)

2

Dairy & dairy alternatives  
(e.g. yogurt, cheese)



Herbal tea for **comfort**.  
Lemon balm contributes to physical and mental wellbeing:  
**Relaxing properties, good mood, and cognitive function.**

🌍 France, Nov 2025

“

I seek **happiness** in the following snacks.

European consumers who consume the following categories:

1

Juices, juice drinks & smoothies

2

Chocolate & sugar confectionery



Jeder Moment wird mit LINDOR zum magischen Moment. Wenn die feine Schokoladenhülle bricht, verführt die unendlich zartschmelzende Füllung Ihre Sinne – ein Moment puren Schokoladenglücks.

When the fine chocolate shell breaks, the infinitely delicately melting filling seduces your senses, a moment of **pure chocolate bliss**. My little moment of happiness.

🌍 Germany, Jun 2025



# Trend 9

# CRAFTING TRADITION



# TREND 9 CRAFTING TRADITION

Regional recipes Traditional methods

Childhood favorites

Food heritage is driving choice by offering comfort, identity, and authenticity in uncertain times.

Source: Innova Trends Survey 2026 (Average of 4 countries)

Notes: Q: "Which are the most important values to you in your diet?" \*This question was within the traditional and cultural section of the survey

Top Trends Top F&B Trends 2026 in Europe



European consumers

"Which are the most important values to you in your diet?\*"



#4 "Maintaining and practicing traditional recipes."

MY TRADITION



#8 "Exploring diverse cultures through food."

YOUR TRADITION



European consumers

"Which of the following feelings do traditional foods and drinks evoke in you?"

33% Happiness



Traditional Homestyle Classic Steak Pie

Traditional homestyle. Dish up happiness.

Ireland, May 2025

33% Connection to Family



Grandma Ebe Herbs And Parmesan Cheese Tortelli

From the secret recipe for tortelli, homemade by Grandma Ebe every Sunday.

Italy, Oct 2025

31% Nostalgia



Wholegrain Buckwheat Fusilli

Felicia Wholegrain Buckwheat Fusilli has a strong flavor and is reminiscent of the aromas and traditions of bygone times.

Germany, Nov 2025

## TREND 9 CRAFTING TRADITION

“Traditional F&B” means different things across the European countries.

Source: Innova Trends Survey 2026 (Average of 4 countries)

Top Trends  
Top F&B Trends 2026 in Europe

“Which characteristics are most important in **defining traditional food and drink** for you?”

### Germany



**Regional recipes;  
Childhood favorites**



Made according to a **traditional recipe.**

Germany, Nov 2025

### France



**Regional/local recipes; National dishes**



Shortbread from **Savoie**.  
**Traditional recipe.**

France, Dec 2025

### Spain



**Regional/local recipes; National dishes**



**Traditional recipe** for over 30 years.

Spain, Jun 2025

### UK



**Childhood favorites; National dishes**



Unique recipe. The **Nation's Favourite.**

United Kingdom, Oct 2025

# Trend 10

## JUSTIFIED CHOICES



## TREND 10 JUSTIFIED CHOICES

Sustainability

Communities

Transparency

Sustainability remains a tiebreaker; it wins when it feels tangible, transparent, and truthful.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q1: "To me, sustainability is of major importance. I always go for the sustainable option." % of consumers who answered "strongly agree" & "agree." Q2: "What would make a higher price for a sustainable product feel justified to you?"

39%

European consumers say:

I always go for the sustainable option.

+9%

Growth in new F&B launches tracked with human-related claims

Europe, CAGR, 2021-2025

Consumers are more accepting of premium prices for sustainable products when brands demonstrate...



European consumers who are concerned about sustainability

1

Support for local farmers or communities

2

Animal welfare standards

3

Environmental protection (e.g., reducing pollution, protecting biodiversity)

4

Waste reduction in production (e.g., upcycling, reducing food waste)



Sustainable cashew nuts. Shipped directly from Africa without detours. 60% carbon dioxide reduction in transport. Premium price for local farmers.

🌐 Belgium, Aug 2025

# TREND 10 JUSTIFIED CHOICES

New product development is aligning with consumer-preferred practices.

Sources: Innova Trends Survey 2026 (Average of 4 countries), Innova Database

Notes: Q: "What would make a higher price for a sustainable product feel justified to you?" NGO = Non-governmental organization

Top Trends  
Top F&B Trends 2026 in Europe

1

“ Support for local farmers or communities



**Fairtrade certified.** In partnership with the NGO Agronomes et vétérinaires sans frontières, to remove the obstacles to the **development of communities.**

🌐 France, Oct 2025

2

“ Animal welfare standards



**Better life animal protection,** 1 out of 3 stars rating. **Better for chickens,** nature, and farmers.

🌐 Netherlands, Jul 2025

3

“ Environmental protection



**Carbon dioxide climate compatibility.** M-Check packaging to respect the environment. Rainforest Alliance **People and Nature Certified Cocoa.**

🌐 Switzerland, Nov 2025



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