



SYNERGY[®]
INSPIRING TASTE™

2026 TASTE TRENDS

European Sweet Goods:
Cakes, Pastries, Biscuits, Desserts



IN THIS REPORT

This report, created with support from Innova, we take a look at key trends in the sweet goods food category: cakes, pastries, sweet biscuits and sweet desserts across Western and Eastern Europe.

Covering the last 3 years, we highlight emerging ingredient trends and product claims, giving a clear picture of what's shaping the 2025 market and what consumers are looking for.



2026 TRENDS

The European bakery & dessert scene showcases a clear balance between innovation for health-conscious consumers and the comforting treats people love.

uk.synergytaste.com



TOP FLAVOURS

We are continuing to see consumers gravitate towards comfort in familiarity and seek traditional flavours. Despite this, consumers are also increasingly drawn to bold, new taste experiences, blending tradition with innovation.



EXPERT CALL OUT

Retro-inspired dessert profiles are at the forefront of developers minds as consumers seek decadent twists on nostalgia classics. Tiramisù-flavoured sweet goods are tipped to keep growing as consumers crave rich and indulgent offerings.

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16%

of sweet goods launches* tracked in Europe are from the leading country, the UK

45%

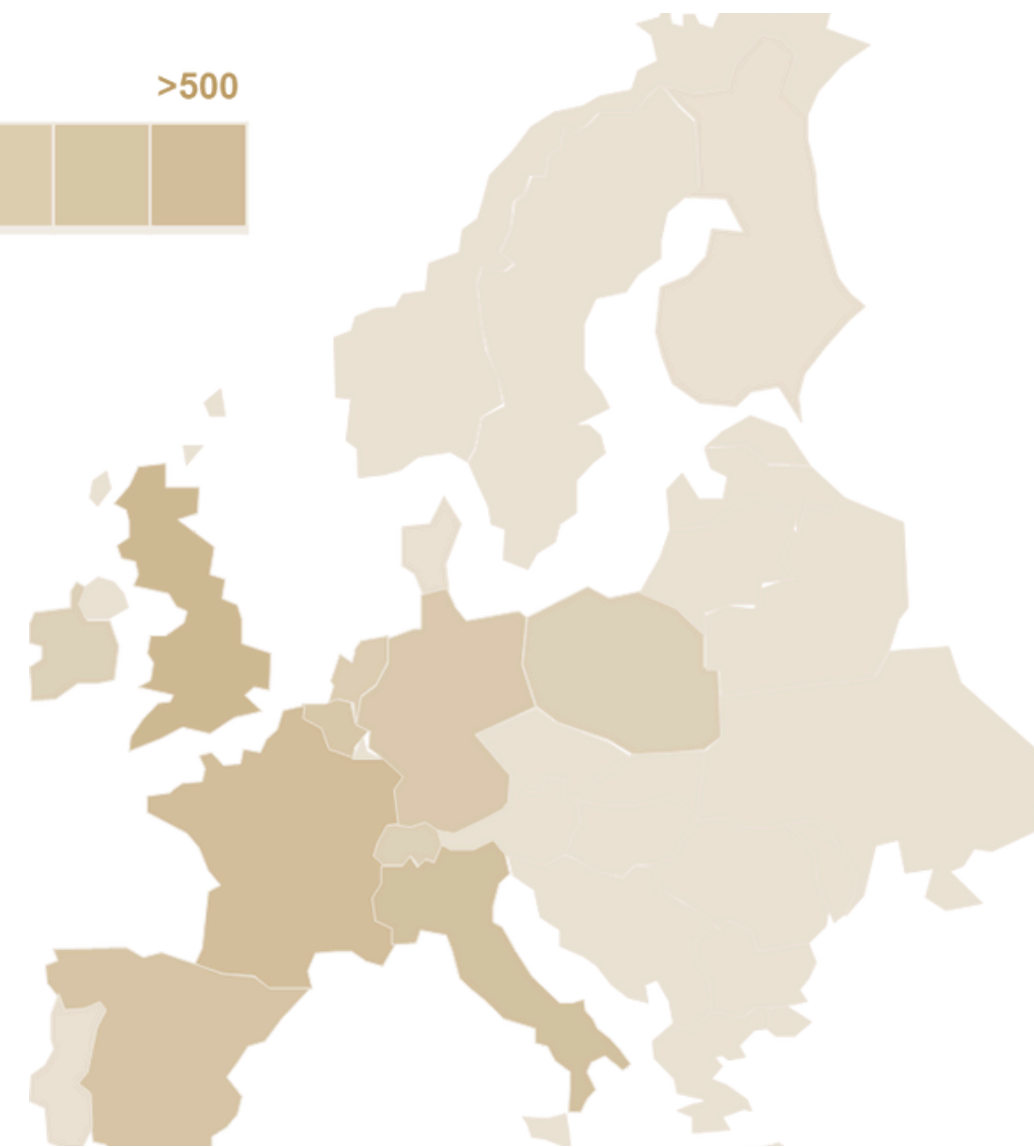
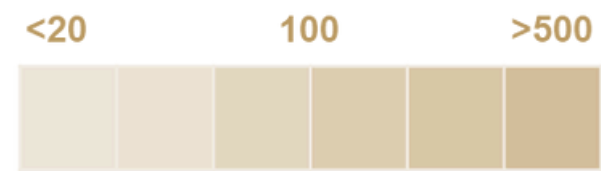
nearly one in every 2 launches tracked in Europe come from UK, France or Italy

33%

CAGR of High/Source of Protein claims in Sweet goods launches tracked in Europe (last 3 years)

29%

CAGR of limited edition claims in Europe in Sweet goods category in last 3 years, driven by UK



*Oct 2023-Sept 2024

NPD Summary



Health at the core

Consumers seek healthier baked goods, driving demand for products with clean, natural ingredients with added nutritional value. High-protein, fibre rich, reduced sugar, and gluten-free products are all seeing strong growth. uk.synergytaste.com



Accessible luxuries

Consumers are spending more on high-quality pastries, especially those who can afford them. Artisan bakeries attract younger demographics with innovative offerings like premium Hot Cross Buns in the UK and Pain Suisse in Italy. The trend of “bakery crawls” is growing across Europe.



Seasonal satisfaction

Seasonal trends in European bakeries adapt to cultural traditions and consumer preferences around key holidays like Easter, Halloween and Christmas. Limited-edition products maximize appeal and drive innovation, ensuring variety year-round. **SYNERGY**

Pudding
 Passion Fruit
 Green Matcha
 Tiramisù
 Meringue
 S'mores
 Stracciatella
 Date
 Buttercream
 Cardamom

INTRODUCTION

Growth in product launches over the last year is high or the flavour is highly mentioned on social media

Raisin
 Pistachio
 Peanut
 Honey
 Cranberry
 Cookies & Cream
 Cheesecake
 Toffee
 Specaloos
 Apple Cinnamon

GROWTH

Appearance in product launches has been growing over the past 2 years

Strawberry
 Orange
 Raspberry
 Brownie
 Salted Caramel
 Gingerbread
 Cinnamon
 Panettone
 Muffin
 Cherry

MATURE

Appearance in product launches has been growing over the last 5 years

Milk Chocolate
 Dark Chocolate
 Hazelnut
 Cocoa
 Vanilla
 Almond
 White Chocolate
 Lemon
 Caramel
 Coconut

PROVEN FAVOURITES

Appeared within top 15 NPD over the last 5 years

TRENDING FLAVOURS

Consumers continue to favour classic flavours in bakery products for their comforting appeal. However, we're seeing a growing demand for rich, indulgent dessert-inspired flavours. The European bakery industry is embracing a fusion of traditional favourites - often with a creative twist - with bold, innovative taste experiences.

FLAVOUR SPOTLIGHT



TIRAMISÙ

Tiramisù is believed to have originated in the Veneto region in Italy in 1960s or 1970s but some claim it dates back even further.

While the classic version of tiramisù remains the go-to for the majority of indulgent-seeking consumers, we've seen European sweet goods manufacturers experiment vastly with this dessert recently, reflecting its enduring appeal and adaptability. The intense coffee notes combined with the indulgence of mascarpone and cocoa lends itself perfectly to consumers who are looking for harmony when it comes to taste and texture.

JAMIE BLAKE

EUROPEAN SWEET GOODS CATEGORY MANAGER

KEY STATS

1m

#tiramisu has been used on Instagram alone, indicating its cultural significance₁

142%

increase in product launches in Europe (2020-2024) with tiramisù as a flavour profile₂

DID YOU KNOW?



The word Tiramisù in Italian means "pick me up" or "cheer me up". This refers to its sugar and caffeine content, which provides a quick energy boost

LATEST NPD



Tiramisù Hot Cross Buns by ASDA, UK



Tiramisù flavoured crispy wafers, France



Tiramisù-inspired cake, Italy

SOCIAL MEDIA SWEET GOODS TRENDS



Tapping into nostalgia

Nostalgia shapes food choices for 27% of Brits, driving strong seasonal sales of classics like caramel. Social buzz around classic doughnuts grew 35.9% last year, with brands like Krispy Kreme tapping in through Ghostbusters and Barbie collaborations.



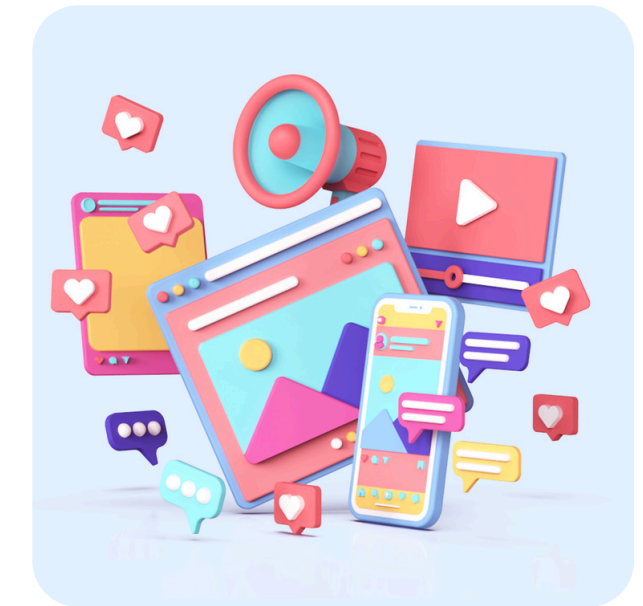
Limited edition indulgence

Limited-edition sweet goods are rising as brands race to keep up with fast-moving social media trends. Lindt capitalized on the “Dubai Pistachio Chocolate” craze after a viral TikTok by @elektraps gained 6.8 million views.



Sweet treats with a functional benefit

Social media is also impacting demand for functional sweet goods, with health focused launches up 27%. The Muller-MyProtein collaboration reflects growing consumer interest in indulgence with wellness.



The trends in numbers

Krispy Kreme got almost **100 thousand** likes on their barbie collab announcement

@elektraps pistachio chocolate video received **6.8 million** likes

Zed Candys campaign had a total of **22.7 million** views on TikTok.



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EUROPEAN CATEGORY DEVELOPMENT
MANAGER - SWEET GOODS AND DAIRY

Feeling Inspired?

At Synergy, we're passionate about turning insights into innovation. Using a blend of art, science and insight Synergy can help their customers to navigate the changing demands of the marketplace with products that stand out from the crowd.

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