



ISM Middle East 2025

What Gen Z and Millennials Want From Confectionery Brands



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What you will discover in this report

As the official Knowledge Partner of ISM Middle East, Innova Market Insights brings global intelligence and data-driven foresight to the region's leading trade platform for sweets and snacks. This report explores the differing needs of Gen Z and Millennials, highlighting untapped opportunities for confectionery brands to deliver more tailored and relevant solutions.



What to expect:

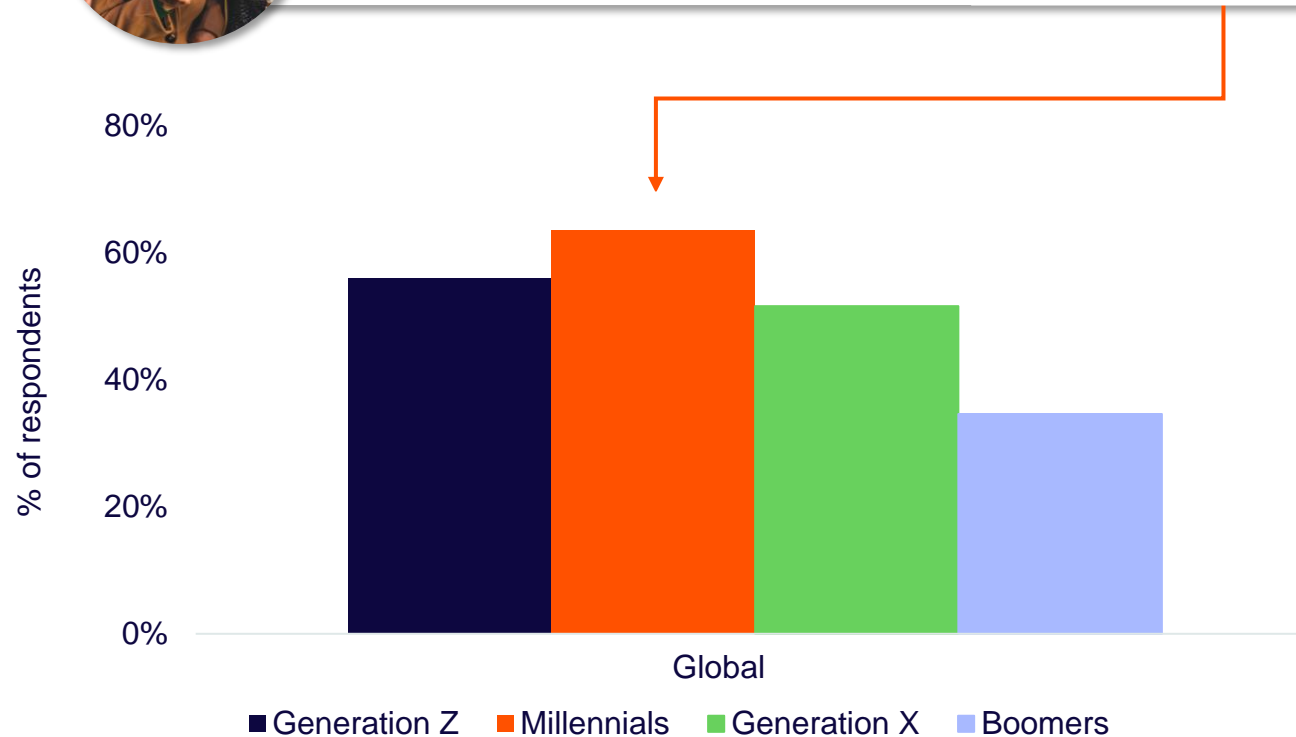
- Key **differences between younger and older generations**, with a focus on consumers' attitudes towards flavor innovations
- Insights into how younger generations are driving **demand for novelty** and the rise **in co-branded products**
- The **rising importance of texture, taste complexity, and flavor fusions** in creating standout confectionery & snack experiences
- Exploration of **cross-category mash-ups** to **drive engagement** amongst younger generations

Whether you're expanding into new markets or refining your export strategy, this report delivers essential intelligence to help you unlock the Middle East & Africa's rising potential only at ISM Middle East.

Novel flavors are appealing to consumers, especially for Millennials



53% of consumers globally agree that when shopping for food and beverage, **they look for flavors they have never tried before.**



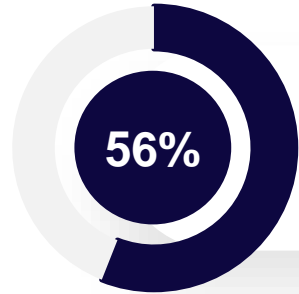
Milk chocolate filled with strawberry mille-feuille

Turkey, Jul 2025

Sources: Innova Database, Innova Flavor Survey 2025 (Average of 11 countries: Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US)

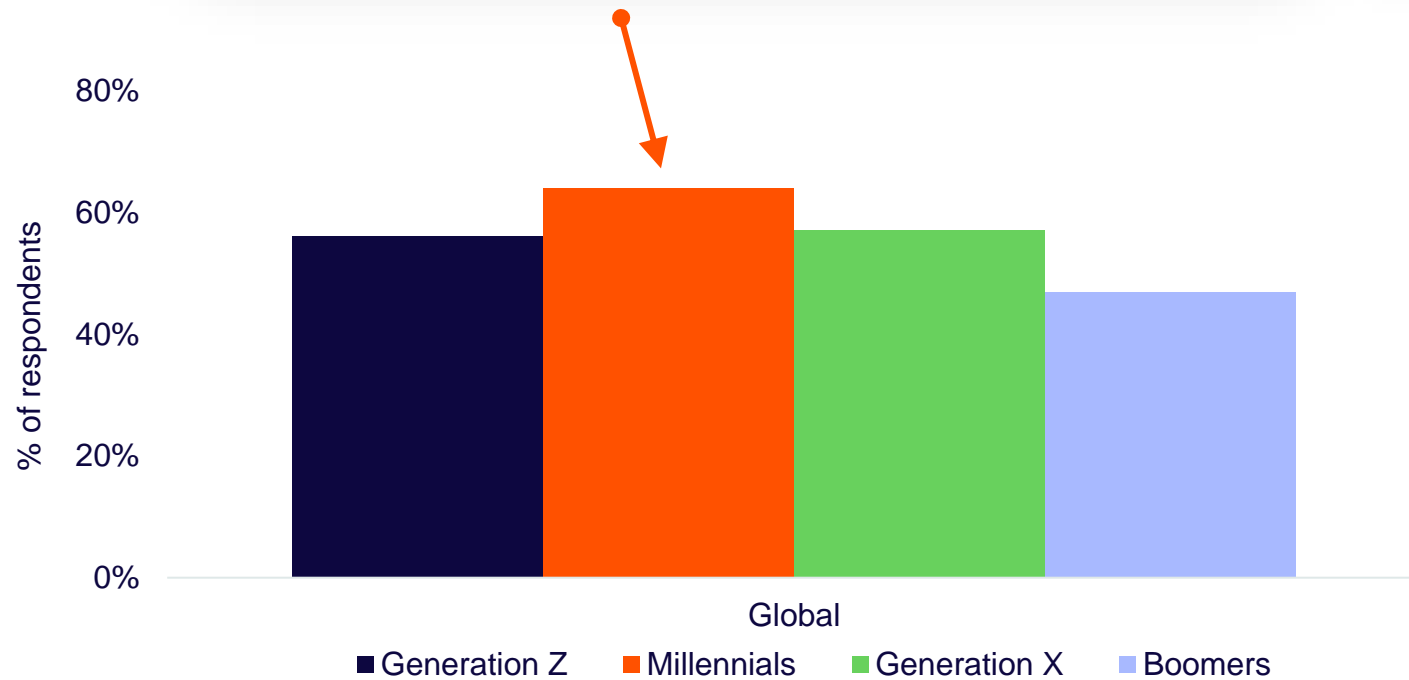
Notes: *Agree is the sum of responses of “agree” and “strongly agree”

Flavor fusions capture consumer interest, especially among Millennials, as they seek exciting new combinations for memorable taste experiences



of respondents globally agree, "I am interested in trying **flavor fusions or combinations**"

Discovering new tastes is one of the most important drivers of enjoyment and pleasure in food (Global)



Generation Z —● 23%



Millennials —● 22%



Generation X —● 19%



Boomers —● 17%

Sources: Innova Trends Survey 2025 (Average of 11 countries), Innova Lifestyle & Attitudes Survey 2024 (Average of 11 countries)

Notes: Q: To what extent do you agree with the following statement? - I am interested in trying flavor fusions or combinations"

Q: What are the most important drivers of enjoyment and pleasure in food for you?

Sweet biscuits & cookies open opportunities for novelty and variety



More than
1 in 4

Gen Z & Millennials in MEA say they have **increased their consumption of sweet biscuits & cookies** because there is more **variety and novelty**.



Bite sized waffle cones filled with mango

Egypt, Feb 2025

Brands can enhance taste and novelty with delectable fillings and coatings

59% of consumers in MEA prefer flavored (e.g. cheese, chocolate, seeds) cakes, pastries & sweet goods vs plain flavors



Egypt, Jun 2025

Croissant filled with strawberry cheesecake flavored jam

Delectable fillings and coatings add depth, improving taste and texture to satisfy consumer cravings.

Top 3 flavors that consumers globally seek in sweet bakery:

#1 Sweet flavors

#2 Sweet, salty & savory flavors

#3 Salty & savory flavors

48% of consumers in MEA prefer multi flavors/flavors blends when buying salty snacks vs plain flavors



Egypt, Jul 2025

Corn puffs with steak mushroom sauce flavor

Sources: Innova Database, Innova Flavor Survey 2025 (Average of 11 countries), Category Survey 2025 (Average of 5 countries)

Note: Q: "Which flavors have you looked for more in the following categories over the last year?" (Select all that apply)

Delivering new experiences and flavors through cross-category mash-ups

Snack & beverage mash-up



Israel, Jul 2025

Corn snack filled with ice coffee cream.

Snack & main course mash-up



Algeria, Jul 2025

Potato chips with pizza flavor.

Sweet confectionery & beverage mash up

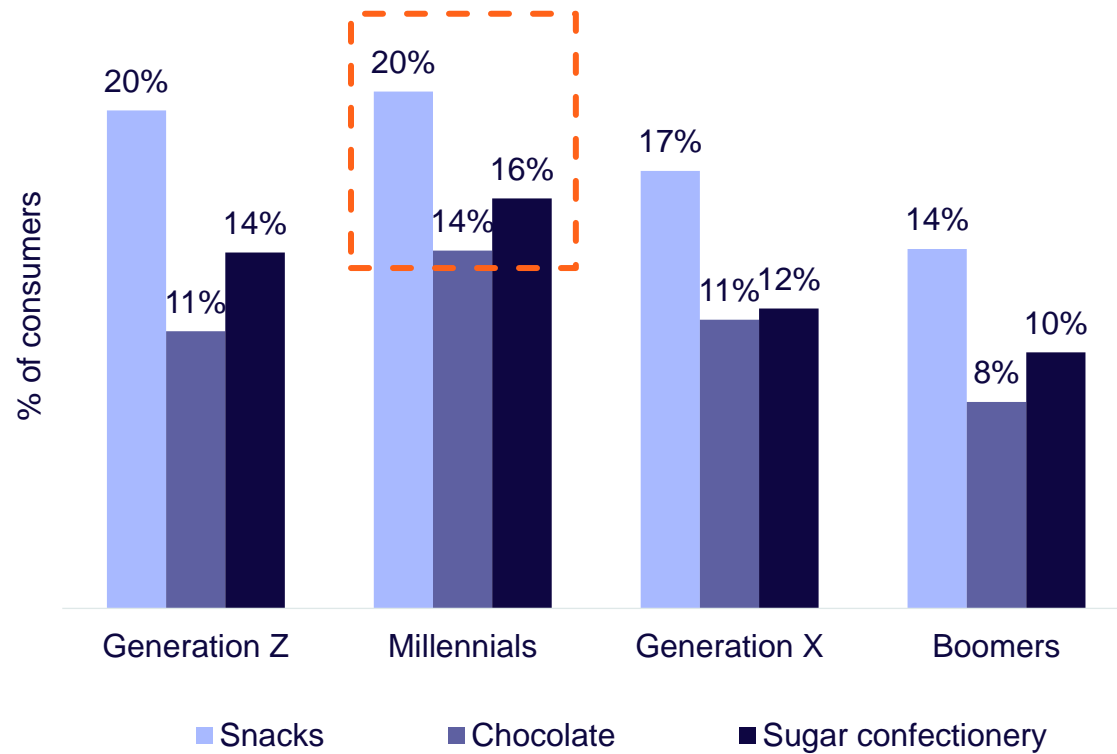


South Africa, Jul 2025

"Your favorite cocktails transformed into irresistible gummies." Alcohol-free.

Demand for sweet and spicy flavors in snacks and confectionery varies by age, with Millennials over-indexing

Which flavors have you looked for more in the following categories over the past year? (Responses for “Sweet and spicy flavors”) (Global, 2025)



Ghana, Apr 2025



South Africa, Feb 2025

Source: Innova Flavor Survey 2025 (Average of 11 countries)

Consumers from different generations prioritize different quality attributes

What is quality for ...?

Quality attributes over-indexing for **Gen X & Boomers**



- ✓ Freshness
- ✓ Health benefits
- ✓ Shelf life
- ✓ Naturalness



Turkey, Jun 2025

**Balanu Sneakerdoodle
Almond Cookies**

Quality attributes over-indexing for **Gen Z & Millennials**



- ✓ Brands
- ✓ Safety
- ✓ Pack presentation
- ✓ Advertisement



Bahrain, Jul 2025

**Pop Tarts Crunchy Poppers
Frosted Strawberry Crunch**

Source: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US);

Note: Q: Which of the following criteria do you use to assess the quality of food and beverage? – Generation Split

Co-branding may also offer excitement among younger generations

+221%

year-over-year growth in sweets & snacks with a
co-branding claim*
(MEA, Jul 2023 – Jun 2025)

Betty Crocker & Reese's



United Arab Emirates, Jul 2025

**Kitkat flavored ice cream
in sweet mochi dough**



United Arab Emirates, Jul 2025

Nutella Samosa



Pakistan, Apr 2025

Source: Innova Database

Note: *Growing from a small base

Key takeaway



Technology-driven engagement

Generation Z leads other generations in enthusiasm for **discovering new tastes**, as part of their search for moments of enjoyment. **Flavor and texture** innovation is essential to attract Generation Z with an emphasis on **fresh and spicy**. In addition, brands can create **gamified food experiences, personalized meal kits, and collaborate with influencers to drive engagement and product awareness**.



Tailored innovations

Millennials are the generation most drawn to try **flavor fusions** and most **willing to spend more to try new flavors**. Innovation strategies include **collaborating with other brands** to combine each brand's favorite flavors into a unique taste experience. **Cross-category mash-ups** can also generate combinations of flavors that capture consumers' imagination.

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