INNOVA MARKET INSIGHTS



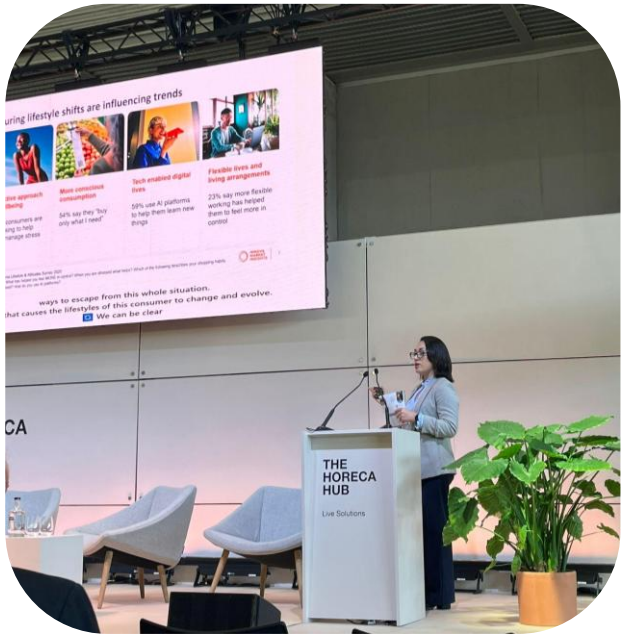
Show Review

Alimentaria Barcelona 2026

March 2026

PROUD KNOWLEDGE PARTNER OF ALIMENTARIA BARCELONA

Innova Market Insights takes the expert stage with the latest developments





Insights presented daily through Innova's 360 view

- Innova guided Alimentaria visitors through its industry-leading **Top 10 Trends for 2026**, highlighting key innovation opportunities in F&B.
- **Global Consumer Trends for 2026** were also presented at The Shift for a special session on Politics, Economy & Global Trends.

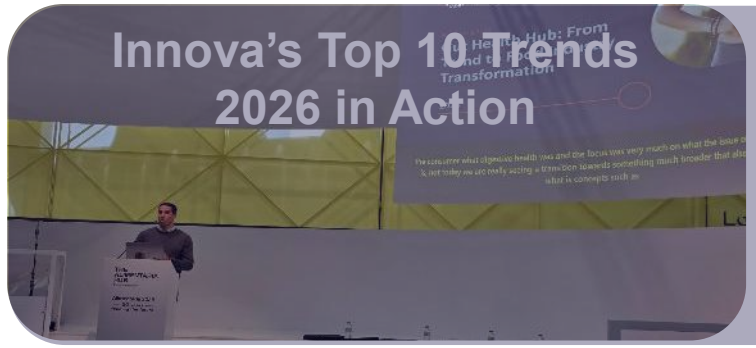
Insights 360 for the holistic view

At Innova, we look for connections from different perspectives using our Insights 360 approach. Powered by intelligence available on the Innova Platform:

- Databases, dashboards, and reports

Source: Innova Market Insights

Innova Market Insights selected the key trends & innovations at Alimentaria 2026



- Innova's experts explored the halls of Alimentaria, uncovering how the **Top Trends for 2026** are shaping innovation in food & beverage.
- Trends #1 **Beverage with purpose,** #2 **Layers of Delight** and #3 **Powerhouse Protein** are key influencers, and additional trends are emerging.
- *Discover Innova's Top 10 Trends in Action here.*



- Winners of Innoval new product showcase highlight core innovation platforms across F&B: **Functionality** and **indulgence**.
- Spotlight on upcycled ingredients, new formats and elevated experiences.
- *Explore all details here.*



- Indulgence remains a key innovation driver across categories, with brands actively developing **new tastes and textures** to elevate the consumption experience.
- At the same time, **emerging technologies** are unlocking more exciting ways to **deliver indulgence**.
- *Find all highlights on what's new here.*

What's Next for the F&B industry? *From formats to sustainability, discover the future implications here.*

Source: Innova Market Insights



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Innova’s Top 10 Trends 2026 in Action

INSPIRE INNOVATION
DRIVE GROWTH

INNOVA MARKET INSIGHTS

TOP F&B TRENDS 2026

1 POWERHOUSE PROTEIN



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

2 GUT HEALTH HUB



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

3 LAYERS OF DELIGHT



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

4 BEVERAGES WITH PURPOSE



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

5 AUTHENTIC PLANT-BASED



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

6 MADE FOR MOMENTS



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

7 WORTH EVERY BITE



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

8 MIND BALANCE



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

9 CRAFTING TRADITION



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

10 JUSTIFIED CHOICES



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

Top F&B Trends 2026



BEVERAGES WITH PURPOSE

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



LAYERS OF DELIGHT

Indulgence is evolving into a multidimensional experience; elevating the moment and mood and combining sensory richness with well-being.



POWERHOUSE PROTEIN

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

Source: Innova Market Insights

Health-driven consumption is shaping functional beverage innovation

Stay hydrated

A range of **functional mineral waters** enhanced with minerals such as magnesium and zinc. Designed to support **hydration, vitality and immunity** while maintaining a clean taste and zero sodium.



Consumers globally

3 pillars of functional beverages

+51%

I increased my consumption of beverages because they are healthy.

Consumers globally who increased their drink consumption





A low-sugar fruit-based soft drink enriched with **prebiotic fiber and magnesium**, supporting **digestive health and overall well-being**. Delivers a **refreshing, guilt-free alternative** to traditional sodas, combining enjoyment with everyday functional benefits.

Sources: Innova Database, Innova Trends Survey 2026 (Average of 11 countries), Innova Database
Note: Q: "To what extent do you agree with the following statements?" % of consumers who answered, "strongly agree", *includes generic gut/ digestive health, prebiotic, probiotic and high/ source of fiber claims

Functional beverages are expanding in gut health, combining refreshment with digestive benefits



+91%

Growth of carbonates with a **prebiotic claim**

Global, YoY 2024 vs 2025



Low-calorie sodas enriched with **prebiotic fibers** support digestion while maintaining a **refreshing, indulgent soft drink experience**.

36%

Consumers globally

Growth in new beverage launches tracked with gut/digestive health* claims

Global, YoY 2024 vs 2025



Combines **fiber and probiotics** in a natural juice format, supporting **gut health through a clean-label, everyday beverage**.

+65%

Growth of carbonates with a **probiotic claim**

Global, YoY 2024 vs 2025

Sources:

Consumers seek textural excitement, and the market is responding with new fillings and texture combinations that create richer, multi-layered experiences

57%

Consumers globally

I am looking for interesting texture combinations in an indulgent food and drink experience

+12%

Growth of sugar confectionery with more than one texture

Global, YoY 2024 vs 2025



Whole raspberries coated in **creamy white and milk chocolate**, combining fruit freshness with indulgent sweetness. A bite-sized treat delivering a **premium, multi-texture snacking experience that balances indulgence and natural ingredients**.



Winner #Innoval Trends Convenience

Carefully selected crispy potato chips coated in **smooth, intense chocolate**, creating a contrast between sweet and salty.
Delivers a **surprising and indulgent snacking experience** with a refined flavor profile

Sources: Innova Trends Survey 2026 (Average of 11 countries), Innova Market Insights
Notes: Q: To what extent do you agree with the following statements? % of consumers who answered “agree” & “strongly agree”

Protein growth extends across convenient snack formats

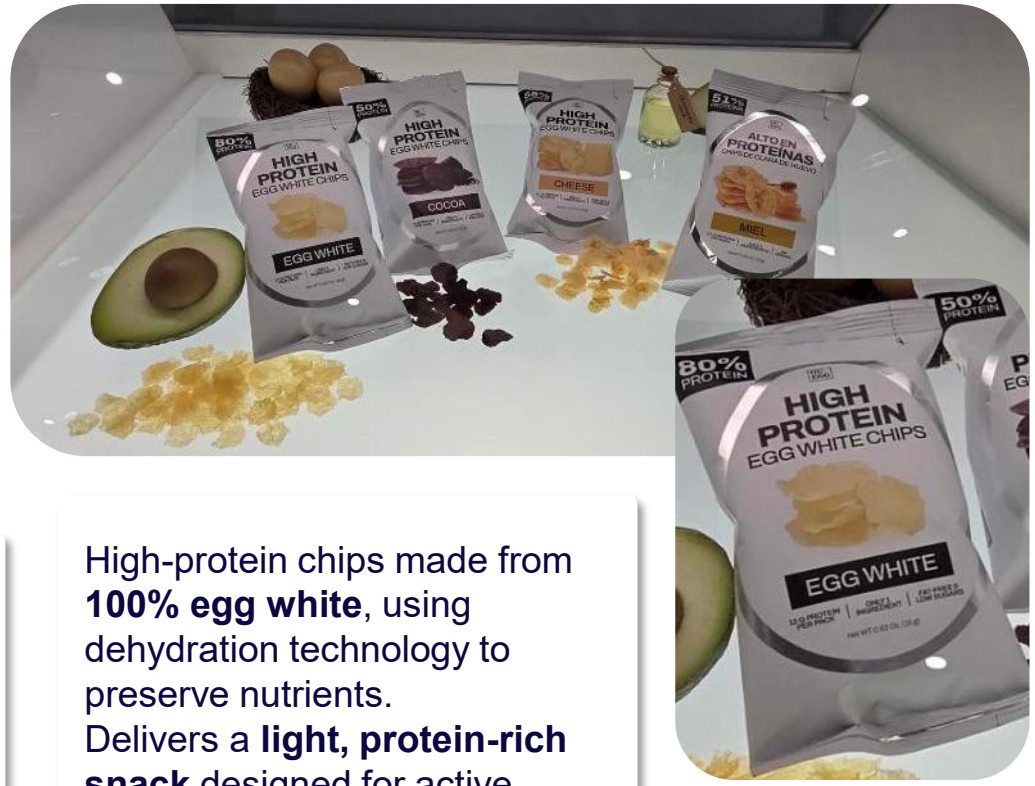
3 in 5

Consumers globally say:

I actively include more protein in my diet.



A range of **high-protein ready-to-eat sandwiches** delivering 21–22g of protein per serving. Combining convenience with nutrition, it offers a **satisfying, on-the-go solution for active consumers without compromising on taste**.

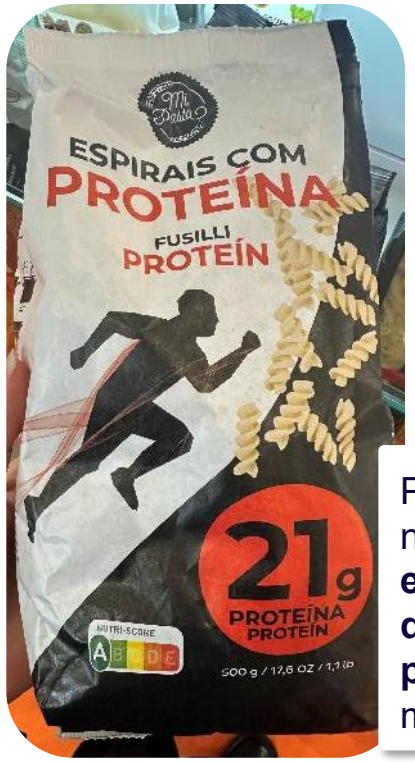


High-protein chips made from **100% egg white**, using dehydration technology to preserve nutrients.
Delivers a **light, protein-rich snack** designed for active lifestyles and convenient consumption

Sources: Innova Trends Survey 2026 (Average of 11 countries), Innova Database
Notes: Q1: “Are you actively including or reducing the following components in your diet?”

Protein is expanding beyond traditional categories into everyday convenience formats

“Protein pasta”





Protein is no longer limited to sports nutrition, but is now embedded across **everyday formats such as pasta, dairy snacks and ready-to-eat products**, making high-protein choices more accessible and habitual



Snack formats

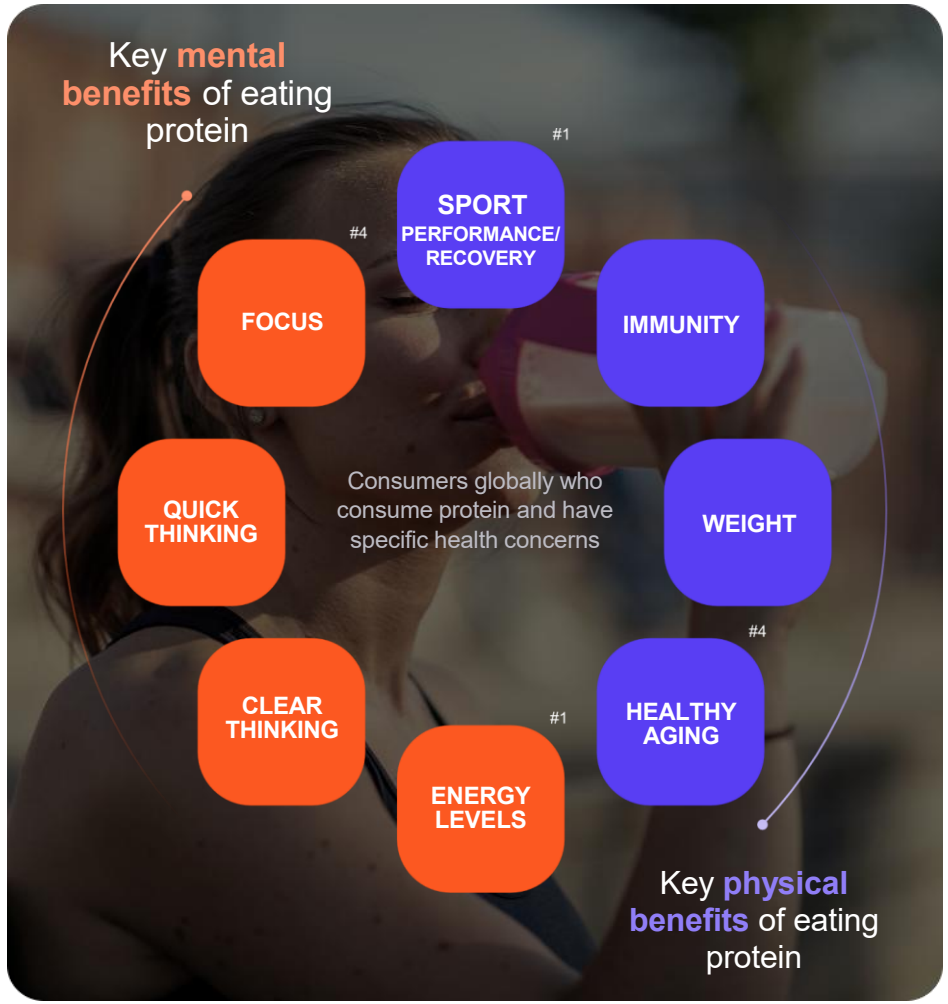
10%

Of snack launches feature a protein claim

Global, 2025

Sources: Innova Trends Survey 2026 (Average of 11 countries), Innova Market Insights
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?”

Legacy brands are reinventing themselves through functional upgrades



"Functional nutrition for younger consumers"

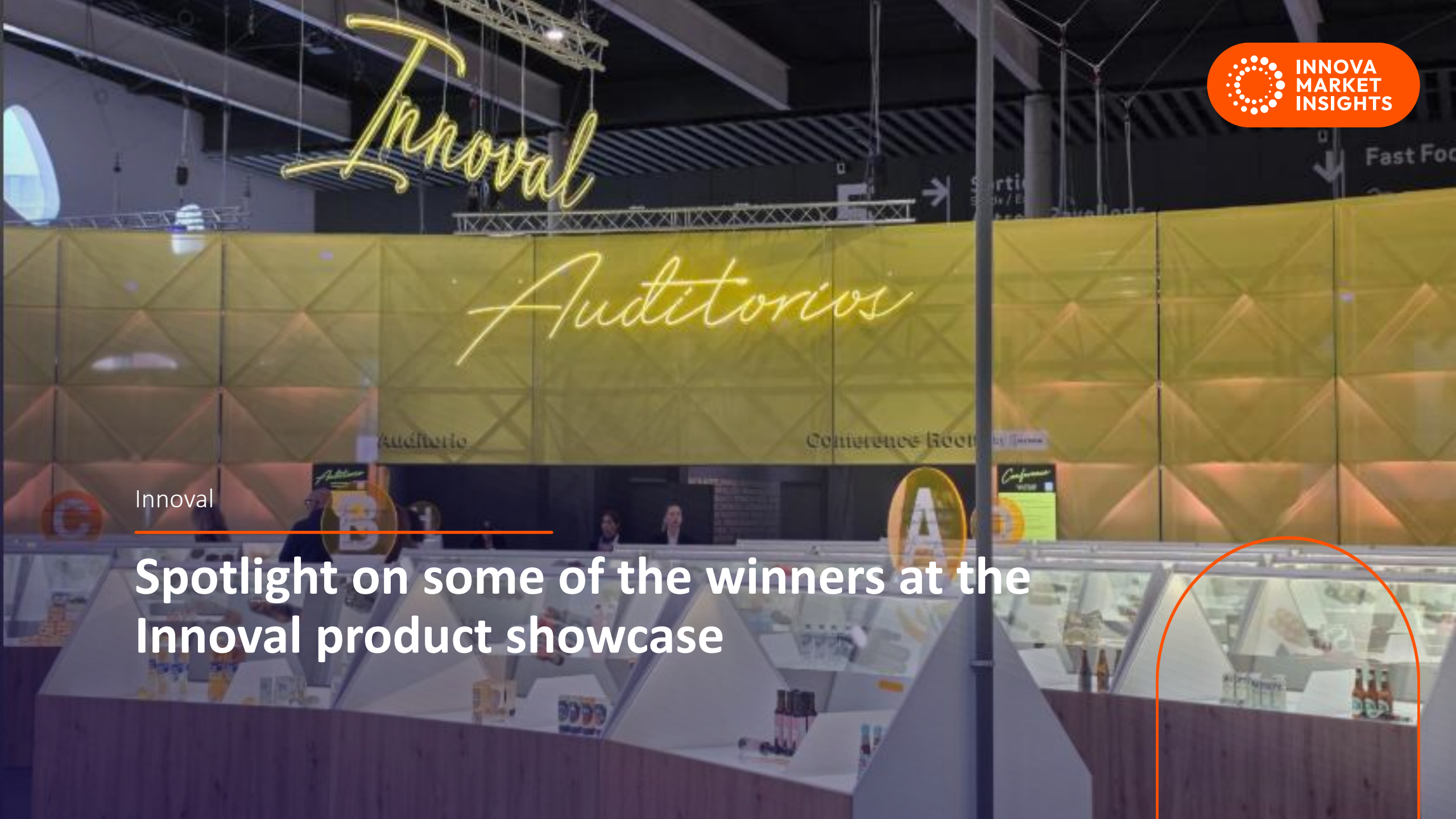






Legacy brands like Nesquik are being reformulated with **added protein**, reduced sugar and functional ingredients (e.g. vitamin B6), transforming traditional indulgent products into everyday nutrition solutions.

Sources: Innova Market Insights,



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Innoval

Spotlight on some of the winners at the Innoval product showcase

Impulse channel award: Bagazitos, baked snack made from Brewer's spent grain

Baked snack made from upcycled beer products, delivering fiber, protein and sustainable value





While protein remains a key driver, innovation is moving towards **resource efficiency**, where nutritional value is created from previously underutilized streams.

Trend 10
JUSTIFIED CHOICES

Baked snack made from **brewer's spent grain**, a byproduct of beer production. Combines **higher fiber** and **protein** with **circular innovation**, transforming waste into a nutritious snack.

Sources: Innova Market Insights,

Ice cream and frozen products award: Pizza inspired snacking in a convenient format

Transforms traditional pizza into a sharable, easy-to-prepare snack format with familiar flavors



A pizza-inspired snack that combines **familiar flavors** with a **convenient**, **sharable format**. By translating a traditional meal into an easy-to prepare product, it delivers casual **indulgence experience** suited for modern snacking occasions.

Trend 3
LAYERS OF DELIGHT

Trend 6
MADE FOR MOMENTS

“Convenient indulgence”

Source: Innova Market Insights,

Alternative protein award: High-protein snacking with single-ingredient simplicity

Egg white-based chips delivering high protein in a light, convenient snack format



"A high-protein snack made from egg white, combining **clean-label simplicity with functional nutrition**. By transforming a single ingredient into a convenient snack format, it delivers a **light, protein-rich alternative for everyday consumption"**.

Made from **100% egg white**, offering a clean and simple formulation with minimal ingredients

Trend 1
POWERHOUSE PROTEIN

Source: Innova Market Insights

Dairy and dairy alternatives award: Plant-based barista drinks

Plant-based barista drinks delivering indulgent taste with clean-label simplicity



Coffee moment

A range of **plant-based oat drinks** created for coffee and indulgent beverage moments.
Flavors such as matcha, pistachio and chai deliver **creamy texture and café-style taste** with a clean label formulation.

Trend 5
AUTHENTIC PLANT-BASED

Source: Innova Market Insights



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What's New in Flavor, Texture & Format?

Technology meets indulgence

+17% growth in new snacks launches with **freeze dry** technology
(Global, CAGR 2021 – 2025)



Real Fruit Snacks With an Indulgent twist

Freshly frozen bananas dipped in a layer of chocolate. **Easy to store** in the freezer and to **eat as a snack**





Crunchy and light peanut snack made with **innovative technology that preserves its natural flavor** and makes it healthier.

Source: Innova Database, Frood

Familiar formats with a twist: creating recognizable yet surprising products that drive experience and sharing



Interactive formats turn snacking into a **playful**, social activity, increasing engagement and shareability beyond the product itself.



Products that mimic familiar foods creates **surprise** and **curiosity**, turning indulgence into a more playful experience



Source: Innova Market Insights

Layered textures and bold flavors are redefining chocolate indulgence



Texture contrast: crunchy cookie bites melting into creamy chocolate drink

From taste to experience: Chocolate is evolving into multi-sensory indulgence through layered textures, contrasting formats and richer flavor combinations.



Layered textures





Elevated flavors

Source: Innova Market Insights

Pistachio: From niche to multi-category growth driver

+29% growth in new chocolate confectionery launches with **pistachio flavor**
(Global, CAGR 2021 – 2025)







Pistachio flavors in unexpected categories, such as **Yerba Mate**



Source: Innova Database

Spicy and Asian flavors are driving excitement



"Choose your spice level"



Consumers are moving beyond familiar tastes, embracing **Asian-inspired and spicy flavor profiles** to bring **novelty and intensity into everyday snacking and meals**.







Spicey jalapeno snack

Source: Innova Database



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What's Next?

Gut health is moving into indulgent categories



Sugar-free lollipops enriched with **fiber and natural ingredients** support digestion while delivering a **familiar sweet treat experience**..

+15%

Growth in new sugar confectionery launches tracked with gut/digestive health claims

Global, CAGR Nov 2020-Oct 2025

Gut health is expanding beyond traditional formats
Prebiotic fiber is increasingly incorporated into **indulgent products such as confectionery and chocolate**, allowing consumers to combine **pleasure with digestive wellbeing**.

Chocolate sweetened with **dates and enriched with prebiotic fiber**, offering a **natural alternative that supports digestive wellbeing**.



Sources: Innova Database, Innova Trends Survey 2026 (Average of 11 countries), Innova Database Q: "To what extent do you agree with the following statements?" % of consumers who answered "agree" & "strongly agree"
Notes:

Convenience meets nutrition: the new generation of ready meal





“Protein-led meals”



“Plant-based positioning”

High-protein ready meals that transform fitness-focused nutrition into **convenient**, everyday eating occasions. By combining substantial protein content with familiar, comforting dishes, the brand bridges the gap between performance nutrition and mainstream meal solutions.

Sources: Innova Market Insights,

Reinventing tradition through premium & gourmet positioning



A modern reinterpretation of fish roe that combines **premium ingredients with refined presentation**. By elevating a traditional product into a gourmet format, it delivers a **high-end sensory experience tailored to upscale consumption occasions**.”.



Accessible premium

Luxury packaging & gifting appeal
Artisanal Greek-style yoghurt, made with an intermidate layer of the best **Matcha.**



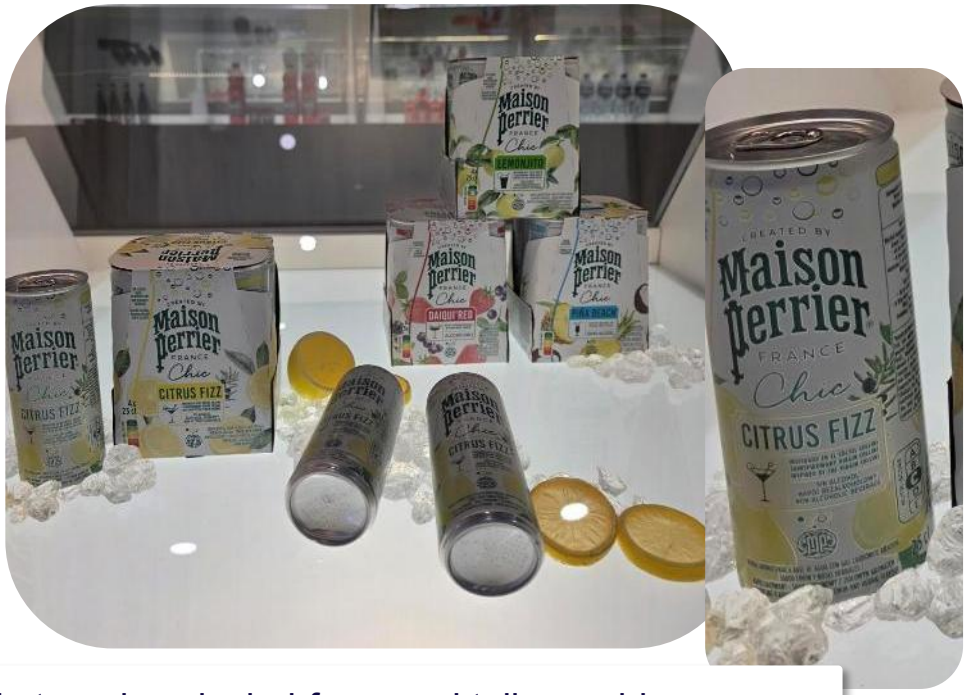
Source: Innova Market Insights

Indulgence becomes occasion-based and purpose-driven

"Indulgence is shifting from a generic treat to a targeted experience, tailored to specific consumer needs and moments"



Blurring the line between **treats and supplements**, this product taps into the rise of **"functional indulgence"**, where consumers seek **pleasure with purpose**, especially in **specific day moments like relaxation and sleep**



Opportunity: design indulgent formats **around functional need states** (sleep, stress, focus)

Ready-to-enjoy alcohol-free mocktails combine **indulgence** with lighter, **better-for-you positioning**, allowing consumers to participate in **social drinking occasions** without compromising on health.

Sources: Innova Market Insights,

What's next: everyday rituals become functional platforms



Coffee is evolving from a daily ritual into **a functional delivery system**, with formats like capsules enabling the seamless integration of **performance ingredients** such as **creatine** and **protein** or **collagen into everyday consumption moments.**

Opportunity: Turn **habitual formats** (coffee) into carriers of targeted **functional benefits**

Consumers globally

Preferred ingredients when consuming liquid formats **35%** **Collagen**

Sources: Innova Trends Survey 2026 (Average of 11 countries), Innova Database
Notes: Q: "Which formats would you prefer for the consumption of collagen/vitamins?"

What's next: emerging spaces beyond core trends



Circular systems & reuse models

Brands are moving beyond recyclable packaging towards **circular systems**, **enabling reuse and return models** that reduce waste and redefine sustainability at a **system level**.

"Innovation is expanding beyond product ingredients into systems, formats and new consumption moments"



Functional formats for younger consumers

Convenient, **on-the-go pouch** formats are expanding into **functional nutrition** for children, combining ease of use with targeted health benefits in **playful, accessible formats.**

2 in 5

Consumers globally say:

Sustainability is important when buying food and drinks.

Source: Innova Trends Survey 2026 (Average of 11 countries), Innova Database
Notes: Q1: "How important is sustainability for you when buying food and drinks?" % of consumers who answered, "very important" & "extremely important." Q2: "What would make a higher price for a sustainable product feel justified to you?"

Global flavors made effortless at home through ready-to-eat formats

Brands are **unlocking global cuisine** for everyday consumers by translating complex international dishes into **ready-to-use formats**, reducing effort **while maintaining authenticity.**



Opportunity: **simplify cooking** without compromising **authenticity**

Source: Innova Market Insights,

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