



Precision, Speed, and Sustainability.

The essential ingredients
to transform Confectionery
manufacturing in 2025.

February 2025



Introduction

The European confectionery industry is undergoing significant change, with revenue projected to reach €189 billion by 2025. Leading markets such as Germany, the UK, and France are driving growth, each with unique contributions. The UK market, for instance, is forecasted to generate €15.4 billion, demonstrating robust demand for innovative and premium products. Germany continues to lead in high-output manufacturing, while France excels in artisanal and luxury offerings.

To meet these growing demands, manufacturers must adopt advanced manufacturing technologies that enhance efficiency, precision, and sustainability. With increasing consumer expectations for eco-friendly production and personalised products, leveraging cutting-edge solutions is essential. This report explores key trends, challenges, and opportunities in the European confectionery industry, showcasing real-world examples and best practices to help manufacturers thrive. Ishida's expertise and innovative solutions are highlighted alongside other market leaders to present a comprehensive picture of the sector's evolution.

What are the challenges facing confectionery manufacturers?



Confectionery producers across Europe face challenges such as evolving consumer preferences, stricter regulations, and the push for sustainability.

According to Euromonitor's 2023 report on consumer trends, 77% of European consumers are willing to pay more for sustainably produced confectionery, reflecting a clear shift towards eco-conscious buying behaviours. Meanwhile, a Kantar 2023 survey highlights a 15% year-on-year growth in demand for sugar-free and vegan options, driven largely by younger demographics prioritising health and wellness. Navigating these shifts requires agility and investment in advanced technologies.

Brands like Ritter Sport in Germany and Cadbury in the UK have successfully embraced these changes by adopting automated, sustainable, and precise production systems. Ishida's advanced solutions, including AI-driven monitoring tools and high-speed multihead weighers, offer manufacturers the ability to adapt to these demands while ensuring efficiency and quality.



Chocolate coated products being weighed and distributed at POEX Confectionery, Czech Republic.

Key themes and opportunities in context

1. Innovation in automation

“ Revolutionising production: How automation is transforming confectionery manufacturing ”

Automation is reshaping the confectionery industry by improving efficiency, reducing errors, and enhancing adaptability. Ishida's Sentinel 5.0 smart factory system exemplifies this, providing real-time monitoring, predictive maintenance, and actionable insights. The system delivered a 15% efficiency gain by resolving recurring production issues and increasing throughput from 30,000 to 35,000 cases per hour, with an ultimate goal of achieving a 30% efficiency boost, as confirmed by independent case studies conducted with mid-sized European confectionery manufacturers.

- **In the UK:** Cadbury's integration of robotics has cut changeover times by 35%, enabling rapid adaptation to seasonal demand, such as Easter and Christmas products (Mondelez International, Operational Insights, 2023).
- **In Germany:** Many high-output facilities leverage AI-powered robotics to improve precision and reduce ingredient waste, meeting high-volume demands efficiently. For example, Ritter Sport utilises advanced automation to streamline operations and optimise resource usage (Ritter Sport Operational Review, 2023).
- **In France:** Premium chocolatier Valrhona employs adaptive automation to scale artisanal production, maintaining consistent quality while preserving traditional craftsmanship (Valrhona Corporate Sustainability Report, 2023).

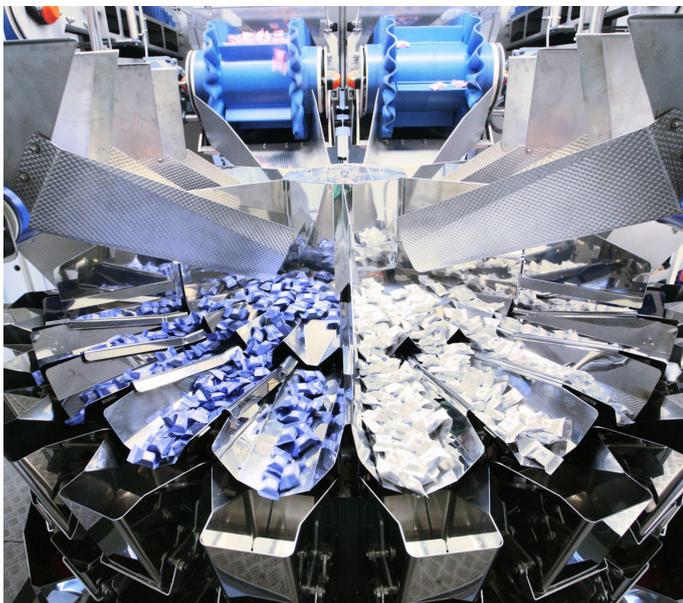
2. Unrivalled accuracy and speed

“Speed meets precision: Ensuring quality and efficiency in confectionery production”

Speed and accuracy are critical to maintaining product quality and meeting consumer expectations. Ishida's Advantage Series multihead weighers deliver precision with speeds of up to 420 weighments per minute, ensuring compliance with EU portioning regulations while reducing costs.

- **Example:** Ritter Sport's adoption of Ishida's 24-head weigher has streamlined packaging processes, reducing overfill and product giveaway by 20% while meeting high production demands (Ritter Sport Operational Review, 2023).
- **Example:** Ishida's 32-head multihead weigher, as implemented at Spain's Chocolates Valor, mixes six products together achieving speeds up to 80 packs per minute for a 470g pack, thus offering flexibility for mixed product packaging.
- **Insight:** With the European confectionery market growing at a CAGR of 4.3%, investments in high-speed systems are essential for scaling operations without sacrificing quality (Euromonitor Industry Trends, 2023).

Examples illustrate the varying capabilities of multihead weighers across different manufacturers and applications. When selecting equipment, it's essential to consider specific production requirements, including product type, desired throughput, and accuracy standards, to determine the most suitable solution.



Ishida helped Ritter Sport reduce overfill and waste by 20%



Mixing six products together whilst achieving 80 packs per minute via Ishida's 32-head multihead weigher. Chocolates Valor, Spain.

3. Flexibility for market diversity

“Customised for success: Adapting to evolving consumer preferences”

The growing demand for a diverse range of products – including vegan, sugar-free, and allergen-free options – calls for highly adaptable manufacturing systems. Ishida's advanced components are designed to enable smooth transitions between product lines, ensuring manufacturers can swiftly respond to evolving consumer trends.



In France, Ishida equipment enables Anis de Flavigny to easily switch between multiple product lines.

- **UK:** The vegan confectionery market, forecasted by Allied Market Research to grow to €2.9 billion by 2032, is supported by adaptable systems that facilitate allergen-free production. NOMO (No Missing Out) exemplifies success in this category.
- **Germany:** High-output facilities benefit from Ishida's multihead weighers, which handle diverse SKUs efficiently. For instance, Ritter Sport's integration of Ishida's systems has enabled precise handling of varied product formats, reducing material waste and optimising packaging efficiency.

4. Resilience in a competitive industry

“ Building stronger supply chains: How technology is boosting resilience ”

Overall Equipment Efficiency (OEE), which reflects the combined impact of availability, performance, and quality, is a key measure of production equipment performance.

The ability to leverage AI to analyse and identify trends in machine or line performance data allows for proactive corrective action, preventing issues before they escalate into more significant disruptions. Systems such as Ishida's Sentinel 5.0 utilise AI to continuously monitor machine and line performance in real time, providing factory managers with automatic alerts on potential performance issues, ensuring swift intervention.

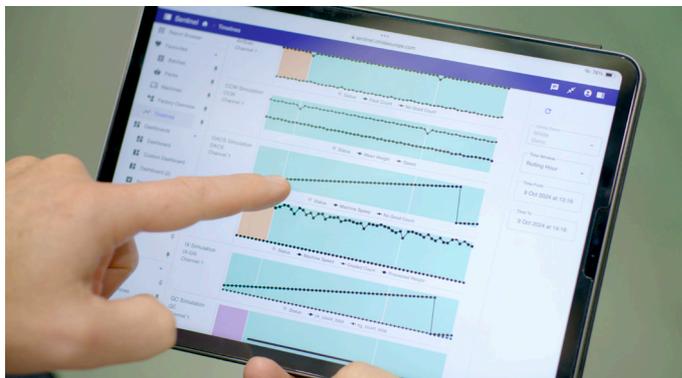
- **In Spain:** Sánchez Cano, a leading gummy producer, increased efficiency by 25% with Ishida's 16-head double outlet weigher, achieving 120 packs per minute without compromising quality.
- **Insight:** According to a 2023 report by McKinsey & Company, predictive tools reduce unplanned downtime, potentially saving manufacturers up to €500,000 annually in lost productivity.

5. Seamless integration across production lines

“ Smart factories in action: Unlocking the power of connected technologies ”

Smart factory solutions, supported by connected technologies, are becoming standard in the industry. Ishida's modular equipment ensures seamless integration, allowing manufacturers to streamline workflows and improve data transparency.

- **UK:** SMEs benefit from modular upgrades with a rapid ROI, as seen with Ishida's Sentinel 5.0 smart factory system, which improves efficiency by 15% (Ishida Internal Performance Studies, 2024).
- **Germany:** Ferrero's use of connected technologies across multiple sites ensures operational consistency and data-driven decision-making, as highlighted in their 2023 Annual Manufacturing Insights.
- **France:** Artisanal chocolatiers combine traditional methods with modern automation to achieve scalability and maintain quality. This is exemplified by Valrhona's practices, which blend craftsmanship with innovative automation solutions (Valrhona Corporate Sustainability Report, 2023).



Sentinel 5.0 production monitoring. Intelligent optimisation at every point.

6. Sustainability as a core focus

“ Greener sweets: The role of sustainability in shaping the future of confectionery ”

Sustainability is no longer optional; it is a key driver of consumer choice and regulatory compliance. According to the European Commission, over 50% of food manufacturers aim to cut their carbon footprint by 2030. Ishida's energy-efficient multihead weighers and eco-conscious systems support manufacturers in achieving these goals.

- **Germany:** Ritter Sport's carbon-neutral production strategy, detailed in their 2023 sustainability report, includes the use of Ishida's precision weighing systems, which have reduced product giveaway and material waste by 22%.
- **UK:** Nestlé UK's zero-waste-to-landfill operations, as outlined in their 2023 Environmental Progress Report, leverage automated material tracking systems, significantly enhancing sustainability and resource efficiency.
- **France:** La Maison du Chocolat integrates Ishida's waste-reducing technologies to optimise ingredient usage, aligning luxury production with eco-conscious practices.



A 22% reduction in product giveaway and material waste with the introduction of Ishida's precision weighing as part of Ritter Sport's sustainability strategy.

Best practice for transforming confectionery manufacturing in 2025 & beyond

To succeed in a fast-evolving market, confectionery manufacturers must proactively adapt to industry trends and challenges.

The rise in consumer demand for sustainability, precision, and diverse product options requires businesses to implement forward-thinking strategies and best practices. By focusing on innovation, collaboration, and workforce development, companies can position themselves as leaders in the competitive confectionery landscape.

Here are the key best practices for driving success:

1. Leverage real-time data insights

Harnessing real-time data is no longer optional - it's a cornerstone of operational excellence. Implementing platforms such as Ishida's Sentinel 5.0 smart factory system empowers manufacturers to monitor performance metrics, predict maintenance needs, and reduce unplanned downtime. This proactive approach improves efficiency, reduces costs, and enhances decision-making in real-time.

2. Invest in flexible and scalable systems

Flexibility is vital for addressing dynamic market demands. Manufacturing systems that are designed to enable quick changeovers to different products provide a foundation to easily adapt to changing consumer preferences and product trends, such as the rise of vegan or sugar-free confectionery. Gradual upgrades ensure cost-effective scalability, enabling businesses to grow while optimising resources.

3. Prioritise sustainability as a strategic driver

With 77% of European consumers willing to pay more for sustainably produced confectionery (Euromonitor, 2023), adopting eco-efficient technologies is critical. Precision weighing systems, like Ishida's multihead weighers, minimise material waste and energy consumption, aligning operational goals with consumer and regulatory demands.



Ishida CCW, X-ray and DACS systems in action at POEX Confectionery in the Czech Republic.

4. Foster strategic collaboration

Partnering with trusted technology providers and suppliers can create tailored solutions that address specific production challenges. Ishida's customer-focused approach demonstrates how collaborative partnerships deliver measurable results, from reduced waste to improved packaging precision.

5. Upskill and empower the workforce

Technology alone cannot drive transformation, trained teams are essential to its success. Investing in upskilling and providing the workforce with the knowledge to operate and optimise advanced systems ensures smooth transitions and fosters innovation within organisations.

By embracing these best practices, confectionery manufacturers can stay ahead of consumer demands, navigate market complexities, and build long-term resilience. The transformation isn't just about technology, it's about integrating innovation with strategy, creating a future where efficiency, sustainability, and quality lead the way.

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Supporting the European confectionery market: Helping brands overcome key challenges

The European confectionery industry faces unique challenges, from meeting sustainability goals to optimising efficiency and maintaining product quality.

Ishida has collaborated with manufacturers across Europe to tackle these obstacles, leveraging advanced technologies and tailored solutions. By sharing real-world examples, we aim to illustrate how brands like yours can address these challenges and drive success.

Practical solutions for real challenges

Improving energy efficiency

Energy efficiency is a priority for many manufacturers striving to meet environmental and cost-saving goals. Achieving this requires not only optimising energy use but also enhancing production efficiency to minimise waste and maximise output.

Ishida's multihead weighers have helped brands like Ritter Sport in Germany reduce product giveaway and improve throughput. By streamlining their operations, they achieved better resource utilisation and more sustainable production practices.

Optimising production monitoring

The Sentinel 5.0 smart factory system offers a blueprint for improving operational visibility and efficiency. A leading confectionery producer implemented Sentinel 5.0 to address production bottlenecks, resulting in a 15% efficiency gain and increased throughput from 30,000 to 35,000 cases per hour. By connecting multiple machines and providing actionable insights, this system supports a smarter, more responsive production environment.

Localised support for operational challenges

Across Europe, manufacturers face unique challenges that require tailored solutions. For instance, Universal Flexible Packaging in the UK benefited from Ishida's localised support, which enabled them to optimise their packaging processes with Multihead weighers and checkweigher systems, improving efficiency while maintaining product integrity.

Customised approaches to diverse needs

Meeting the growing demand for product diversity is critical for confectionery brands. Toms Confectionery in Denmark partnered with Ishida to manage multi-product lines effectively, balancing flexibility with quality and consistency. Similarly, Sanchez Cano in Spain integrated Ishida's sector-specific CCW systems to enhance jelly confectionery production, improving handling and packaging.



Sentinel 5.0, optimises production by connecting multiple machines and providing actionable insights through AI machine learning.

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Aligning industry goals with practical achievements

Through partnerships with brands across Europe, Ishida has contributed to achieving key manufacturing objectives such as:

- Enhanced efficiency and speed: Ricola Herbal Sweets in Switzerland improved production throughput without expanding their factory footprint by leveraging Ishida's multihead weigher systems.
- Reducing material waste: Ritter Sport achieved compliance and sustainability goals by using precision multihead weighing to minimise giveaway.
- Flexibility in product offerings: Ruebezahl in Germany managed a broad portfolio of chocolate products with precision and efficiency using Ishida's X-ray inspection systems.
- Harnessing data for improvement: The Sentinel 5.0 system provides manufacturers with real-time data to optimise performance, demonstrating how AI-driven insights can future-proof operations.

Learning from success across the industry

Several examples highlight how brands have overcome challenges through innovative approaches:

- **Hensen (Germany):** Increased efficiency in precision packaging with Ishida's multihead weigher systems.
- **Chocolates Valor (Spain):** Expanded premium chocolate production with consistent quality using high-head mixing multihead weigher systems.
- **Anis de Flavigny Sweets (France):** Maintained traditional production values while optimising operations with Ishida's CCW-R-107P multihead weigher.



Anis de Flavigny, traditional production values optimised with the latest technology from Ishida.



Precision quality control and flexibility for Ruebezahl's varied product portfolio using Ishida's inspection systems.

These examples showcase how manufacturers across Europe are navigating challenges in sustainability, efficiency, and adaptability. By focusing on practical, real-world solutions, Ishida and other technology partners are helping brands meet consumer expectations while staying ahead in an evolving market.

Connect with Ishida

How could your confectionery business benefit from the power of connected technology? Are you keen to take production to the next level with innovative, sustainable, fast, accurate, and flexible digital systems? Well, Ishida can deliver through the bespoke integration of weighers, quality control systems, and other industry-leading solutions.

Explore the Ishida website and arrange a consultation to discover a range of connected technologies that can be customised to your needs.



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