

# Health and Wellness in the United Kingdom

November 2023

Table of Contents

### EXECUTIVE SUMMARY

Overview

### DISCLAIMER

## HW Hot Drinks in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

No caffeine hot drinks gain momentum in the UK

Natural remains popular growth driver of category sales in 2022 as consumers look to avoid artificial ingredients

Superfruit records positive performance within health and wellness hot drinks

#### PROSPECTS AND OPPORTUNITIES

Health trend to drive sales of natural and fortified/functional hot drinks in the UK

No caffeine to retain strong position within health and wellness hot drinks over forecast period

High fibre expected to record increase as consumers look to fortify their nutritional intake

#### CATEGORY DATA

Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2022

Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2022

Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027

Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Soft Drinks in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Further dynamic growth for low sugar variants of UK soft drinks

Good source of vitamins leads claims in health and wellness soft drinks in 2022

High protein shows good growth in 2022 as consumers search for greater functionality

#### PROSPECTS AND OPPORTUNITIES

Anti-stress and pro-sleep soft drinks likely to gain ground

No sugar to remain relevant claim in soft drinks, supported by changes to UK legislation

Low fat set to become more relevant over the forecast period

#### CATEGORY DATA

Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022

Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022

Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 16 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027

Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Snacks in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Expanding offer of low sugar snacks in 2022 supports value growth

2022 sees vegan in the lead within health and wellness snacks, driven by changing lifestyles and sustainability concerns

Cardiovascular health claim on the rise in 2022 in line with rising weight gain concerns in the UK

#### PROSPECTS AND OPPORTUNITIES

Stable demand for high protein snack bars over the forecast period

Further promise for vegan health and wellness snacks due to expansion of target audience

Probiotic expected to record positive performance, supported by demand for greater functionality

#### CATEGORY DATA

Table 18 - Sales of Snacks by Health and Wellness Type: Value 2019-2022

Table 19 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022

Table 20 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022

Table 21 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 22 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 23 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 24 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 25 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

## HW Dairy Products and Alternatives in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Health trend drives demand for high protein and better for you dairy products

Low fat is leading health and wellness claim in dairy products and alternatives due to rising obesity concerns in the UK

Growth in no allergens driven by greater food intolerance awareness and general health trends

#### PROSPECTS AND OPPORTUNITIES

Fortified/functional claims and dietary and free from dairy set to gain further momentum

Good source of minerals to remain strong claim within health and wellness dairy products and alternatives over the forecast period

Increasing demand for no sugar options set to be driven by rising health awareness and further HFSS legislation

#### CATEGORY DATA

Table 27 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022

Table 29 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 30 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 31 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

Table 32 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 33 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 34 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

## HW Cooking Ingredients and Meals in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Consumers review sauces, dips and condiments used for home cooking in light of heightened health awareness  
2022 sees vegetarian lead health and wellness cooking ingredients and meals due to rising number of flexitarians in the UK  
Brain health and memory claim within health and wellness cooking ingredients and meals boosted in 2022

#### PROSPECTS AND OPPORTUNITIES

A strong emphasis on health and new legislation set to support future growth of no sugar products  
Local consumers set to further reduce reliance on animal products over forecast period  
Probiotic claim expected to benefit from consumer focus on gut health

#### CATEGORY DATA

Table 36 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2022

Table 38 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 39 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 42 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 43 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2022-2027

## HW Staple Foods in the United Kingdom

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

HFSS regulation drives innovation in better for you and fortified/functional products  
Vegetarian leads health and wellness staple foods, supported by flexitarian population  
Probiotic sees increased consumer interest within health and wellness staple foods

#### PROSPECTS AND OPPORTUNITIES

Flexitarianism to help boost sales of vegan and vegetarian meat and seafood substitutes  
Vegetarian set to retain strong presence within health and wellness staple foods due to health, environmental and animal welfare concerns  
Review of diets and nutritional intake set to support keto staple foods niche

#### CATEGORY DATA

Table 45 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

Table 46 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2022

Table 47 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 48 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 50 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 51 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 52 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2022-2027

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/health-and-wellness-in-the-united-kingdom/report](http://www.euromonitor.com/health-and-wellness-in-the-united-kingdom/report).