

Health and Wellness in Poland

November 2023

Table of Contents

EXECUTIVE SUMMARY

Overview

DISCLAIMER

HW Hot Drinks in Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Products offering functional ingredients and immune support see rising sales

Coffee helps natural to hold the leading sales within health and wellness hot drinks, although natural tea also has significant sales

Superfruit claim boosted by a consumer desire to look good and maintain health within hot drinks

PROSPECTS AND OPPORTUNITIES

Innovations in terms of no caffeine coffee and coffee with additives

Healthier lifestyles and demand for less processing will lead natural to see significant absolute growth in health and wellness hot drinks

Concern about diseases of the circulatory system set to boost interest in cardiovascular health hot drinks

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 Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Government acts to discourage high sugar consumption

Natural leads sales of health and wellness soft drinks, as consumers aim to maintain their health through diet

Low fat claim in health and wellness soft drinks benefits from media coverage that raises concern about health problems linked to fat consumption

PROSPECTS AND OPPORTUNITIES

Further withdrawal of high sugar soft drinks as scope of regulation set to expand

Natural likely to show promise in health and wellness soft drinks during the forecast period as consumers seek out less processed soft drinks

Concerns about health, the environment, and animal welfare set to boost lactose free during 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 Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers turn to locally produced health and wellness snacks offering flavour variety

Gluten free leads health and wellness snacks as consumer awareness of gluten intolerance rises and more references are available

Consumers' desire to boost their metabolism sees rise in sales of superfruit snacks

PROSPECTS AND OPPORTUNITIES

Body consciousness and health awareness will support growth for health and wellness snacks

Continuing the trend from 2022, gluten free also set to see strong absolute growth in health and wellness snacks over the forecast period

Consumer concerns over cardiovascular health and recent legislation set to lead to growth in cardiovascular health and no fat products

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 Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 22 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 23 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 24 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027

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

HW Dairy Products and Alternatives in Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Activities to promote vegan dairy products and alternatives

In 2022, the natural claim leads health and wellness dairy products and alternatives, as such products enjoy greater consumer trust

Consumers look for energy boosting claims due to busy lives and challenges recovering from COVID-19

PROSPECTS AND OPPORTUNITIES

Popularity of lactose-free and vegan products to stimulate sales

Natural also set to see the strongest absolute growth in health and wellness dairy products and alternatives over the forecast period

Concerns about health, animal welfare and the environment mean vegetarian will be a claim to watch

CATEGORY DATA

Table 26 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022

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

Table 28 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 29 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 30 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

Table 31 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 32 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 33 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

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

HW Cooking Ingredients and Meals in Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Adding value through vegan and clean label

Concern about overprocessing of food helps natural to lead sales of health and wellness cooking ingredients and meals

Good source of antioxidants records growth as consumers look for functional products, while low fat also sees rising value sales in 2022

PROSPECTS AND OPPORTUNITIES

Innovations in the vegetarian and vegan space set to stimulate sales

Natural to see the most promising absolute growth in health and wellness cooking ingredients and meals as consumers avoid overprocessed foods

No allergens expected to record value growth as consumers look after themselves and the planet

CATEGORY DATA

Table 35 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

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

Table 37 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 38 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 39 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 42 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

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

HW Staple Foods in Poland

KEY DATA FINDINGS

2022 DEVELOPMENTS

Vegetarian and no sugar products highlight added features to attract consumers

Increased health concerns, boosted by the pandemic, leads high fibre to see the highest sales in health and wellness staple foods

As vegetarian and vegan diets become more popular, plant-based records the most dynamic performance within health and wellness staple foods

PROSPECTS AND OPPORTUNITIES

Need for innovation, especially in light of recent legislation, but also a need to remain price-competitive

Vegan set to see strong absolute growth in health and wellness staple foods as more consumers turn to a diet free from animal products

With consumers looking to improve their digestion and metabolism, probiotic will be one to watch within health and wellness staple foods

CATEGORY DATA

Table 44 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

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

Table 46 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 47 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 48 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 50 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 51 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

Table 52 - 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-poland/report.