



Competitor Strategies in Health and Nutrition

March 2021

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Key findings

COMPETITIVE ENVIRONMENT

COVID-19: impact on health and nutrition

COVID-19 sets new indicator when shopping: effect on immunity support

Six among top 10 players enjoy revenue from both HW food and drinks

HW will outperform non-HW products in all food and drinks industries

Long-term growth potential in emerging markets despite challenges in 2020

Traction from big food players to smaller ones

FF dominates but free from and organic rapidly rising

Major source of sugar: shift from sugared products to fruits

Being overconsumed, protein transitions from quantity to quality

OPPORTUNITIES IN HEALTH AND NUTRITION

Five key health and wellness trends in 2021

Probiotics and mushrooms in support of the immune system

Strong potential for prebiotic fibre especially in symbiotic approach

Immunity boosting and localised milk formula recipes are emerging

Rise of organic and special baby food

PepsiCo expands to mental wellness and sleep aid

Collagen booms while new ingredients for beauty claims are emerging

COVID-19 pandemic accelerated the growth of flexitarianism

Growing flexitarianism hints at potential for synergetic claim approach

Plant-based claims remain niche compared to vegetarian and vegan

Localisation for flavour adaptation and higher affordability

"Plant-based", not just a cliché

BUSINESS STRATEGIES

Top six HW players in the spotlight

Aiming to be "a total beverage company", Coca-Cola expands to dairy

PepsiCo enters free from meat snacks and beverages with Beyond Meat

Danone focuses on digestive health and free from dairy

Nestlé's various new HW product launches focus on plant-based

Further expansion in Asia Pacific is key for Red Bull GmbH

Kellogg Co looking into organic and NH breakfast cereals

CONCLUSIONS

Recommendations

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