

# Health and Wellness in the US

November 2023

Table of Contents

## Health and Wellness in the US

### EXECUTIVE SUMMARY

Overview

### DISCLAIMER

## HW Hot Drinks in the US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Striking a balance between energy and calm

Health concerns see no allergens in the lead in health and wellness hot drinks

Health concerns drive interest in no sugar in health and wellness hot drinks

### PROSPECTS AND OPPORTUNITIES

Increasing fragmentation of functional claims to take place

Dairy free to see high incremental growth within health and wellness hot drinks to 2027, as consumers care for their health, the environment, and animal welfare

Low fat set to grow over the forecast period, as consumers seek to control weight and maintain health

### 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 US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Functional attributes drive growth across soft drinks

Although growth slows as concern about the pandemic ease, natural continues to lead health and wellness soft drinks

Digestive health and probiotic soft drinks emerge as key drivers of health and wellness growth within functional soft drinks

### PROSPECTS AND OPPORTUNITIES

Low sugar investment will be met with growing demand

Balancing no added sugar with vitamin and benefit claims is key to reigniting growth in juice

Lactose free will be one to watch, as consumers seek to take care of their own health

### 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 US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Rising costs highlight the importance of access to healthy snacks

With a consumer group not limited to those with gluten intolerance, gluten free holds the highest sales within health and wellness snacks

Digestive health rises as consumers look to boost their immune health

#### PROSPECTS AND OPPORTUNITIES

Combination claims and ingredient leverage to play a greater role in securing sales in health and wellness snacks

Continued concern for health set to drive the highest actual growth for gluten free snacks within health and wellness snacks to 2027

Good source of minerals set to rise as consumers try to increase their metabolism

#### 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 US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Plant-based dairy experiences high levels of innovation from major players in 2022

Low fat leads health and wellness dairy products and alternatives due to health and weight concerns, but various factors hamper growth

Concerns about daily wellbeing continue to expand lactose free claims in 2022

#### PROSPECTS AND OPPORTUNITIES

No and low sugar claims set to see growth over 2022-2027 as consumers understand the need for a healthier diet

Good source of minerals set to see the strongest performance over the forecast period as consumers look to boost their metabolism

Vegan will be one to watch as consumers seek to have a positive impact on their health, the environment, and animal welfare

#### 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 US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Consumers continue to migrate to functional oriented claims, rather than “low/no” claims

Gluten free leads sales within health and wellness cooking ingredients and meals as health remains to the fore post-pandemic

As consumers look for products that align with a specific diet, keto records sales rise within health and wellness cooking ingredients and meals

#### PROSPECTS AND OPPORTUNITIES

Holistic approach to health will continue to drive growth

Wide consumer group for gluten free set to drive highest absolute growth in health and wellness cooking ingredients and meals over the forecast period

Immune support is set to benefit as interest in strengthening health lingers

#### 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 US

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Plant-based meat and seafood substitutes sees a year of slower growth

Gluten free leads health and wellness staple foods, as the consumer base extends beyond those with gluten intolerance

Keto staple foods rising as more consumers move towards lower carb diets

#### PROSPECTS AND OPPORTUNITIES

Dietary claims set to drive growth in the forecast period

Vegetarian claim to see the strongest absolute growth in health and wellness staple foods as the consumer group expands

Desire to boost metabolism and improve gut health set to lead to growth for probiotic claim over the forecast period

#### 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-us/report](http://www.euromonitor.com/health-and-wellness-in-the-us/report).