



World Market for Health and Wellness

December 2023

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Examining five trends shaping health and wellness

STATE OF THE INDUSTRY

Natural claim tops the charts as it has strong presence amongst all foods and beverages

Leading overall claims

Snacks industry booms with products free from gluten

Low fat claim, albeit smaller, maintains consistent relevance across different regions

Motivations to seek Gluten-Free foods become more concrete

Private label helps Gluten Free claim to spread across different categories

Gluten-free chocolate: one example of the claim's expansion

Less is more when consumers search for healthier refreshments

Sugar reduction trend shapes the future of soft drinks

Latin America to boost Natural claim in Soft Drinks

Natural flavouring to bridge the gap for energy drinks

Heineken develops all-natural premium soda line in Brazil

Growth of organic claim in food and drinks set to be challenged

Although last among the top 10, protein claim has bright prospects

Protein bars is a well that will keep on giving as regional development differs

LEADING COMPANIES AND BRANDS

Strong market fragmentation allows room for new market players

In snacks, international players find it easier to generate gluten free sales

Snacks brands that are gluten free by design top category's sales

Leading soft drinks brand owners strengthen their positions among natural products

Real and alluded naturalness is sought-after label in soft drinks

TOP FIVE TRENDS SHAPING THE INDUSTRY

Examining five trends shaping health and wellness

Plant-based movement among the most defining for health claims in foods

Major category inroads to be made for claims within the plant-based trend

Sugar avoidance: From weight loss to heart health

"No added" to outperform "no" and "low" sugar claims as perceived as "cleanest"

Alternative ingredients and "tools" in quest for sugar reduction claims

High protein label to expand outside Western markets

"High protein" promises physical strength and energy, but more benefits become front of mind

Price of organic needs to be justified again

Greater understanding around the microbiome to propel related health claims

MARKET SNAPSHOTS

Global snapshot of Better For You subcategories

Global snapshot of Dietary and Free From subcategories

Global snapshot of Fortified/Functional subcategories

Global snapshot of Health Benefit subcategories

Global snapshot of Natural & Organic subcategories

Regional snapshot of Asia Pacific

Regional snapshot of Australasia

Regional snapshot of Eastern Europe

Regional snapshot of Latin America

Regional snapshot of Middle East and Africa

Regional snapshot of North America

Regional snapshot of Western Europe

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