



Euromonitor
International

Health and Wellness in South Africa

November 2024

Table of Contents

EXECUTIVE SUMMARY

- Health and wellness in focus
- Consumer weight trends
- Consumer diet trends
- Health-related deaths
- Blood pressure and cholesterol levels
- Diabetes prevalence

DISCLAIMER

HW Hot Drinks in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Vegan claim enters hot drinks in South Africa
- No caffeine is leading health and wellness claim in hot drinks in South Africa
- Natural remains strong claim as consumers look to reduce intake of artificial ingredients

PROSPECTS AND OPPORTUNITIES

- Rooibos tea expected to help drive future growth of hot drinks due to various health and wellness claims
- Further growth for weight management claim due to rising obesity concerns in South Africa
- Strong potential for energy boosting claim due to increasingly busy lifestyles

CATEGORY DATA

- Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2023
- Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2023-2028
- Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2023-2028

HW Soft Drinks in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Energy boosting is leading claim in health and wellness soft drinks, encouraging new brands to enter
- No sugar is popular health and wellness claim in soft drinks as consumers focus on reducing intake of ingredients perceived as detrimental to health
- Dynamic growth for high fibre as consumers seek functionality in soft drinks

PROSPECTS AND OPPORTUNITIES

- Impending new sugar tax expected to positively impact soft drinks with better for you claims
- Rising interest for immune support in health and wellness soft drinks
- No caffeine to remain relevant health and wellness claim within soft drinks

CATEGORY DATA

- Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2023
- Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 16 - Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2023-2028

Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2023-2028

HW Snacks in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Gluten free is leading claim in health and wellness snacks in South Africa

Rising interest in plant-based claim in health and wellness snacks

Cross-category expansion as Weet-Bix looks to leverage high fibre snack trend

PROSPECTS AND OPPORTUNITIES

Growing concerns over lifestyle diseases set to drive demand for snacks accompanied by health claims

Gluten free snacks to remain leading health claim, driven by high-income South Africans

High protein snack bars set to expand reach

CATEGORY DATA

Table 19 - Sales of Snacks by Health and Wellness Type: Value 2019-2023

Table 20 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2023

Table 21 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2023

Table 22 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 23 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 24 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 25 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: Value 2023-2028

Table 27 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2023-2028

HW Dairy Products and Alternatives in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low fat is leading claim for health and wellness dairy products and alternatives as South Africa's obese population continues to rise

Yoghurt remains key area for fortification to help alleviate micronutrient deficiencies

Flexitarian population helps drive growth of plant-based, vegan and vegetarian claims in dairy products and alternatives in 2023

PROSPECTS AND OPPORTUNITIES

New food labelling regulations set to strengthen consumer awareness of fat content in dairy products

Rising demand for lactose free to encourage further new product development

Significant potential for low salt within dairy products and alternatives

CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2023

Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2023

Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value

2019-20

Table 33 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 34 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2023-2028

Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2023-2028

HW Cooking Ingredients and Meals in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vegetarian is leading claim, addressing environmental and animal welfare concerns

Younger generation continues to drive demand for plant-based options

Low sugar and fat key considerations in health and wellness cooking ingredients and meals

PROSPECTS AND OPPORTUNITIES

New proposed food labelling offers potential for cooking ingredients and meals with “no” or “low” health and wellness claims

Vegetarian to remain leading claim in health and wellness cooking ingredients and meals over the forecast period

Solid performance for natural honey due to perceptions of higher quality

CATEGORY DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2023

Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2023

Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2023-2028

Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2023-2028

HW Staple Foods in South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

High fibre is leading health and wellness claim due to greater understanding of the need for fortification in diets

Health and wellness claims for breakfast cereals perform well despite inflationary pressures

Woolworths offers consumers inspiration on how to prepare quick meals using staple foods during blackouts

PROSPECTS AND OPPORTUNITIES

Proposed rigorous food labelling to potentially disrupt breakfast cereals

High fibre to remain popular claim and offers further growth potential as consumers look to fortified staple foods as part of healthier eating plans

Niche of digestive health set to gain momentum

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2023

Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2023

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2023-2028

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2023-2028

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-south-africa/report.