



# Health and Wellness in South Africa

November 2023

Table of Contents

## Health and Wellness in South Africa

### EXECUTIVE SUMMARY

Overview

### DISCLAIMER

## HW Hot Drinks in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Dietary and free from driven by plant-based offerings within hot drinks

Natural is leading claim within health and wellness hot drinks as consumers look to reduce intake of artificial ingredients

Weight management claim increasingly significant in line with rising obesity concerns in South Africa

### PROSPECTS AND OPPORTUNITIES

Rooibos tea expected to drive growth across several categories over forecast period

Natural offers further growth potential to remain leading claim in health and wellness hot drinks over the forecast period

Energy boosting claim to rise as consumers seek support for busy lifestyles

### MARKET 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 Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 6 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022

Table 7 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027

Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Soft Drinks in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Children a key target audience for health and wellness juice

No sugar is leading claim in health and wellness soft drinks as consumers focus on reducing intake of ingredients perceived as detrimental to health

Rising interest for immune support in health and wellness soft drinks in 2022

### PROSPECTS AND OPPORTUNITIES

Impending sugar tax expected to positively impact better for you claims

No sugar offers further growth potential, driven by health concerns and rising obesity rates

High fibre set to rise as consumers warm to functionality in soft drinks

### MARKET DATA

Table 9 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022

Table 10 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022

Table 11 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 12 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 13 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 14 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022

Table 15 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027

Table 16 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Snacks in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Private label leads innovation in health and wellness snacks  
Gluten free is leading claim in health and wellness snacks in South Africa  
Rising interest in plant-based claim in health and wellness snacks

#### PROSPECTS AND OPPORTUNITIES

Growing concern over lifestyle diseases drive demand for healthier snacks and rigorous food labelling  
Despite marginal declines, demand for gluten free snacks likely to be driven by higher-income South Africans  
Growing demand for no allergens claim

#### MARKET DATA

Table 17 - Sales of Snacks by Health and Wellness Type: Value 2019-2022  
Table 18 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022  
Table 19 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022  
Table 20 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022  
Table 21 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022  
Table 22 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022  
Table 23 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027  
Table 24 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

## HW Dairy Products and Alternatives in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Yoghurt remains key area for fortification to help alleviate micronutrient deficiencies  
Low fat is leading claim for health and wellness dairy products and alternatives as South Africa's obese population continues to rise  
Vegetarian is the best performing claim in health and wellness dairy products and alternatives in 2022

#### PROSPECTS AND OPPORTUNITIES

New food labelling regulations expected increase consumer awareness of fat content in dairy products  
Low fat offers further development potential, driven by increasing awareness of impact on health amid rising obesity rates  
Significant potential for low salt

#### MARKET DATA

Table 25 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022  
Table 26 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022  
Table 27 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022  
Table 28 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V  
Table 29 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20  
Table 30 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2  
Table 31 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022  
Table 32 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027  
Table 33 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

## HW Cooking Ingredients and Meals in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Younger generation is driving demand for plant-based options

Vegetarian is leading claim offering affordability whilst addressing environmental and animal welfare concerns

Low salt a key consideration in health and wellness cooking ingredients and meals

#### PROSPECTS AND OPPORTUNITIES

Sweet spreads and ready meals expected to be most affected by new proposed food labelling

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

Lactose free expected to grow over the forecast period

#### MARKET DATA

Table 34 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

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

Table 36 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 37 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 38 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 39 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

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

## HW Staple Foods in South Africa

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Health takes a backseat in consumers' priorities as inflationary pressures rise in 2022

High fibre is leading health and wellness claim due to greater understanding of the need for fortification, especially in terms of children's diets

Probiotic staple foods chosen as they benefit one's immune system

#### PROSPECTS AND OPPORTUNITIES

Proposed rigorous food labelling expected to shake up 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

Digestive health expected to rise in significance

#### MARKET DATA

Table 43 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

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

Table 45 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 46 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 47 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 48 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

Table 50 - 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-south-africa/report](http://www.euromonitor.com/health-and-wellness-in-south-africa/report).