



Euromonitor
International

Health and Wellness in India

August 2024

Table of Contents

Health and Wellness in India

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Immune support leads health and wellness hot drinks in 2023 as parents look to reinforce their children's immune system

Natural continues to grow in health and wellness hot drinks, as consumers avoid overprocessed beverages

Good source of vitamins claim grows as consumers look for fortification

PROSPECTS AND OPPORTUNITIES

Even sugar reduction may not be enough to drive growth in low/no/no added sugar other hot drinks, due to bad press

Lactose free expected to rise as consumers look for products for specific dietary requirements

No caffeine set to grow as more consumers look to improve their sleep quality

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players respond to consumer demand for sugar reduction

As consumers look for soft drinks to help them in their busy lives, energy boosting leads health and wellness soft drinks in 2023

Consumers continue to turn to natural products as they are regarded as better for their health

PROSPECTS AND OPPORTUNITIES

Adoption of natural sweeteners across soft drinks expected to increase, buoyed by local production of monk fruit

With consumers looking to fortified/functional drinks to maintain their health, rising demand for good source of vitamins and minerals is expected

Rising demand for brain health and memory in health and wellness soft drinks, with a widening consumer group

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vegetarian accounts for the highest sales within health and wellness snacks in 2023 due to health and animal welfare concerns

High fibre has high sales in health and wellness snacks in 2023, due to attempts to address various health problems through diet

Fortified/functional claims record growth as consumers are keen to maintain their health through the addition of beneficial ingredients

PROSPECTS AND OPPORTUNITIES

Gluten free shows promise within health and wellness snacks, as product availability is expanding

Sugar reduction will become increasingly important as consumer awareness rises

Low fat set to see growth as consumers look for better for you products

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low fat holds the highest share in health and wellness dairy products and alternatives 2023, due to consumers' health concerns

Amul is active in the high protein space, which helps drive growth

Good source of vitamins and minerals boosted by the desire for a strong metabolism

PROSPECTS AND OPPORTUNITIES

Probiotic set to increase as a health claim due to consumers' desire to maintain gut health and general wellness

Plant-based benefits from concerns over ingredients and nutrients in dairy products

No sugar and no added sugar set to see a boost over the forecast period

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and animal welfare concerns ensure vegetarian accounts for the highest sales within health and wellness cooking ingredients and meals in 2023

Natural remains a popular health and wellness claim as consumers are concerned about overprocessed foods

No allergens within health and wellness cooking ingredients and meals boosted by consumers paying closer attention to their diet

PROSPECTS AND OPPORTUNITIES

Fortified/functional health claims set to gain traction, along with increasing consumer interest and the focus on healthy foods

Vegetarian, vegan and plant-based set to grow within health and wellness cooking ingredients and meals as the consumer base rises

Low, no, and no added sugar cooking ingredients and meals will be ones to watch as consumers look for better for you products

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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fortified/functional products are increasingly popular due to consumers' increased focus on and interest in nutrition

High fibre leads health and wellness staple foods in 2023, thanks to the desire for good digestive health

With new regulatory standards for basmati rice, quality is guaranteed, boosting consumer confidence in purchasing

PROSPECTS AND OPPORTUNITIES

Vegetarian set to see growth within health and wellness staple foods in 2023, thanks to the strength of vegetarian cakes

Cardiovascular health performs well within health and wellness staple foods in 2023, as an FSSAI ruling limits trans-fat consumption

With labelling changes and consumers seeking better for you products, low sugar will be one to watch

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-india/report.