



Euromonitor  
International

# Health and Wellness in Poland

August 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 Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Natural claim leads sales as consumers look for beneficial hot drinks
- Products offering functional ingredients and immune support see rising sales
- Growth for no caffeine options as manufactures focus on improving taste

PROSPECTS AND OPPORTUNITIES

- Natural records significant sales as consumers avoid artificial ingredients
- Concern about obesity, diabetes and long term health conditions drives sales of no sugar
- The superfruit claim gains ground as consumers look to boost vitamin and mineral intake

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

HW Soft Drinks in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

- The natural claim drives the strongest growth as consumers avoid artificial ingredients
- Functional claims and low fat products drive growth and shape innovations
- The high sugar tax and ongoing health concerns lead to product reforms in soft drinks

PROSPECTS AND OPPORTUNITIES

- Negative discussion of ultra-processed goods drives sales of the natural claim
- Functional benefits will form part of the purchasing decision across the forecast period
- Opportunities for plant-based and lactose free launches as vegan diets rise

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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Gluten free leads as rising availability and health benefits drive retail value sales

Consumers migrate to natural snacks as concerns surrounding artificial ingredients rise

Superfruit offerings gain ground as consumers look to support immunity and metabolism

#### PROSPECTS AND OPPORTUNITIES

Low sugar combines with taste and texture to boost sales on the snacks landscape

Gluten free and natural claims drive value sales, supported by ongoing innovations

High protein snacks align with consumers' health, fitness and weight management goals

#### 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The natural claim leads retail value sales as consumers look to maximise health benefits

As vegan diets increase, plant-based and vegan options gain ground on the landscape

Lactose free options rise as consumers avoid allergens and look to improve gut health

#### PROSPECTS AND OPPORTUNITIES

The natural claim see the strongest sales as consumers avoid artificial ingredients

The rising popularity of vegan and vegetarian products drive sales and shape innovations

Consumers look for low fat claims as obesity and diabetes rise in Poland

#### 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Healthy, active lifestyles shape innovations in the cooking ingredients and meals landscape

The natural claim gains ground as concern surrounding ultra-processed food rises

Vegan, vegetarian and flexitarian lifestyles shape product innovations in 2023

#### PROSPECTS AND OPPORTUNITIES

Concern surrounding artificial ingredients rise, with natural products leading sales

Double-digit growth for no allergens as consumers become more conscious of their diets

Good source of antioxidants records growth as consumers look for functional properties

#### 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Gluten free leads sales as consumers aim to improve their digestion and overall health

High fibre records double-digit growth as consumers seek healthier options

Plant-based options record a dynamic performance as meat-free diets increase

#### PROSPECTS AND OPPORTUNITIES

No sugar products will increasingly attract consumers across the forecast period

No fat options gain ground as innovations align with both legislations and consumer concern

Vegan drives double-digit growth as meat-free, flexitarian and plant-based diets rise

#### 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-poland/report](https://www.euromonitor.com/health-and-wellness-in-poland/report).