



Health and Wellness in the United Arab Emirates

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EXECUTIVE SUMMARY

Health-driven reformulation and functional positioning support resilient growth

INDUSTRY PERFORMANCE

Sugar avoidance accelerates amid obesity concerns and policy pressure
Clean label and functional nutrition gain scale as consumers seek “everyday wellness” upgrades

WHAT'S NEXT

Naturalness, added-value functionality and specialised diets to drive future demand

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HW Hot Drinks in the United Arab Emirates

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health-conscious choices support natural and reduced sugar hot drinks

INDUSTRY PERFORMANCE

Sugar avoidance and convenience shape mainstream health choices
Natural remains the most influential claim, led by herbal tea
Vegetarian remains niche, concentrated in instant mixes

WHAT'S NEXT

Natural and functional tea benefits set to drive future health-led demand
Natural positioning will remain central, supporting both established and emerging brands
Vegetarian is expected to remain stable rather than accelerate

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Functionality and reduced sugar drive health and wellness demand

INDUSTRY PERFORMANCE

Claims-led decision-making strengthens as consumers seek healthier indulgence
Natural benefits from strong associations with healthier living
Good source of vitamins performs strongly as functional hydration grows

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Health awareness will deepen, supporting growth for natural and functional propositions

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Clean label indulgence and portion control reshape health-focused snacking

INDUSTRY PERFORMANCE

Permissible indulgence grows as consumers seek healthier snack formats

Natural maintains strong momentum as brands expand "better ingredients" propositions

No sugar demand expands as mindful indulgence strengthens

WHAT'S NEXT

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2024 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Protein and gut health claims gain momentum across modern retail
Local production gains visibility, supporting premium quality cues
Good source of minerals remains a core claim, led by fortified milk

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Natural positioning gains ground as health and sustainability expectations rise

INDUSTRY PERFORMANCE

Reformulation, functionality and plant-based meal options shape the category
Natural strengthens through quality assurance and trust-building initiatives
Vegetarian benefits from dietary diversity and healthier convenience

WHAT'S NEXT

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Natural expected to stay dominant, supported by reduced sugar and "better ingredients" choices
Vegetarian expected to expand through modern ready meals and plant-based staples

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Fortified and specialised staples gain traction amid evolving wellness priorities

INDUSTRY PERFORMANCE

Functional nutrition and “healthier everyday choices” shape staple demand

Gluten free expands beyond niche shoppers as availability improves

Organic demand strengthens as health and sustainability converge

WHAT'S NEXT

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Gluten free expected to expand through innovation and wider mass-market reach

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