



Passport

Health and Wellness in South Africa

Euromonitor International

November 2024

This sample report is for illustration purposes only.

Some content and data have been changed.

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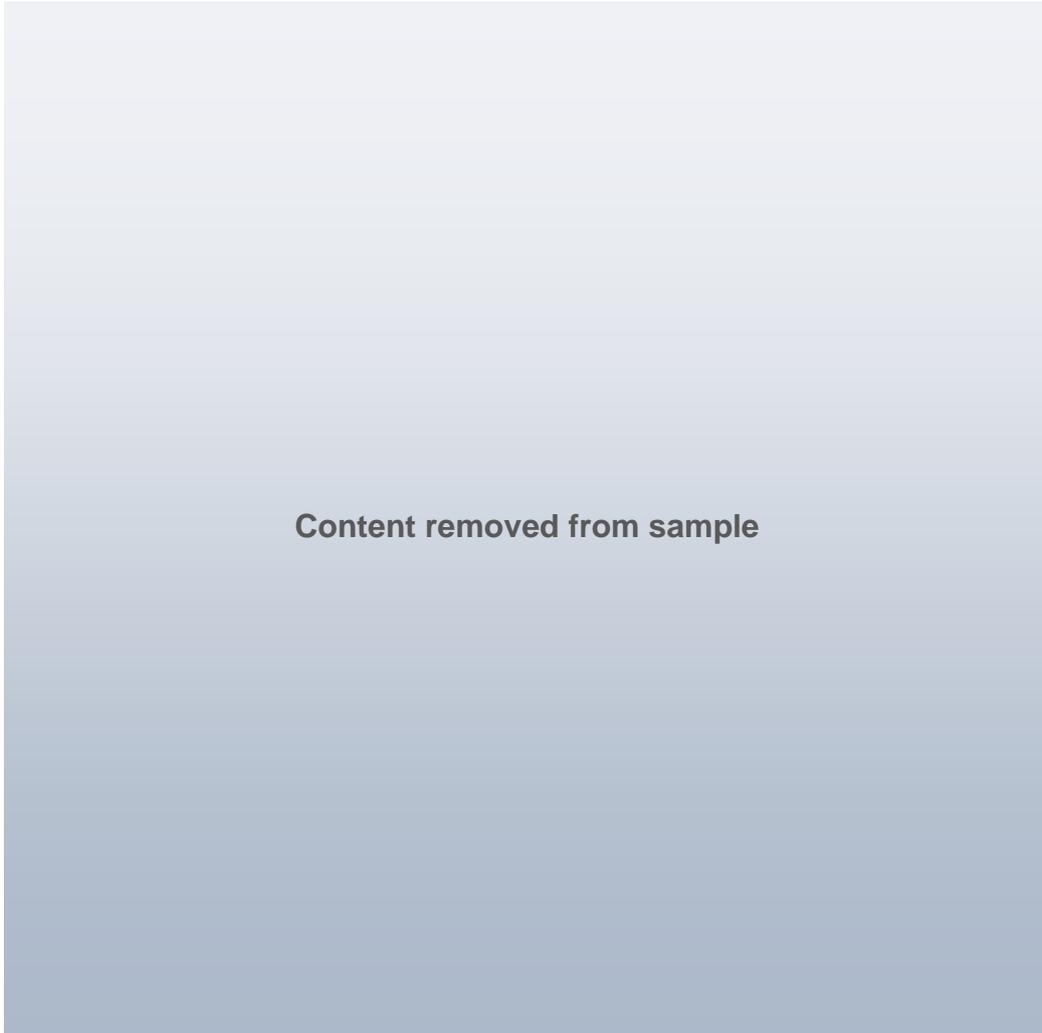
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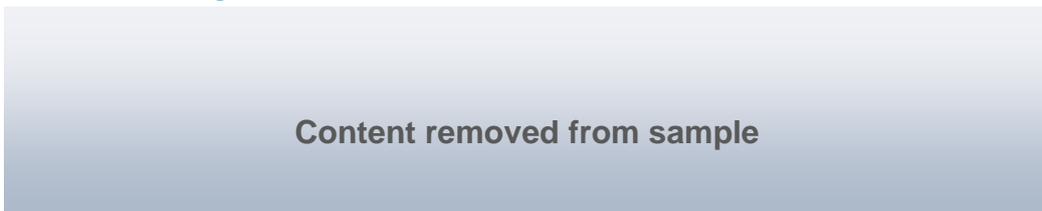
HEALTH AND WELLNESS IN SOUTH AFRICA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Health and wellness in focus



Consumer weight trends

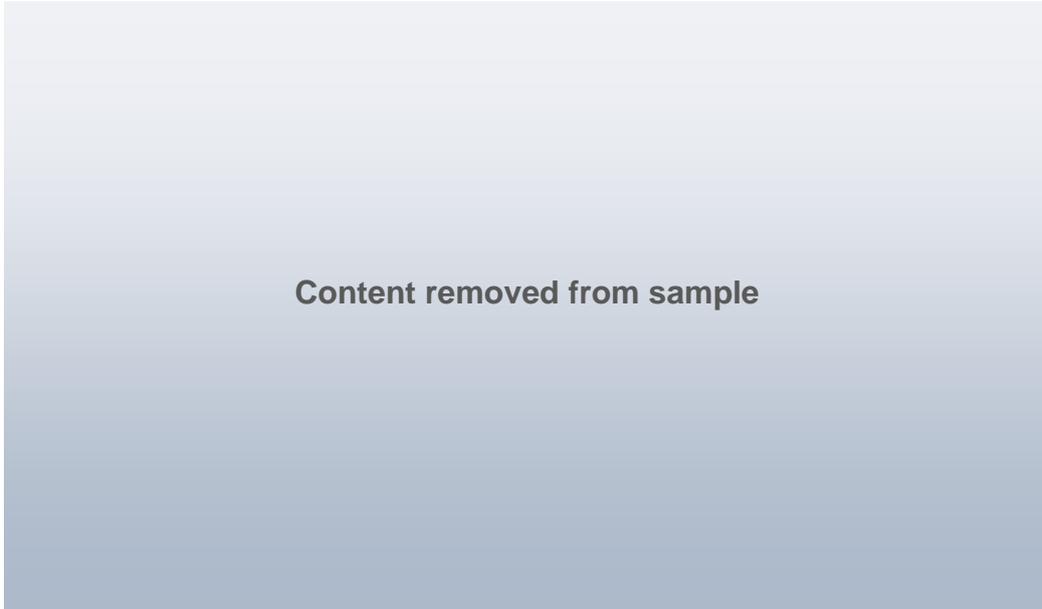


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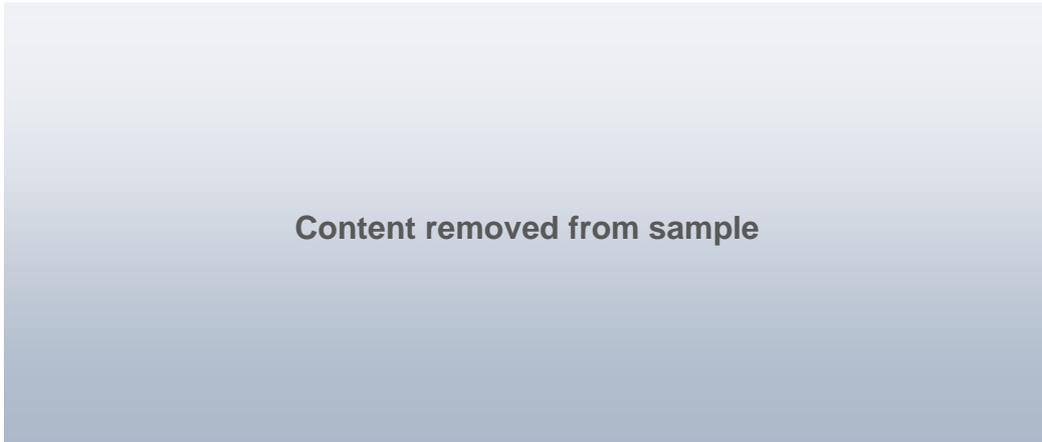
Consumer diet trends

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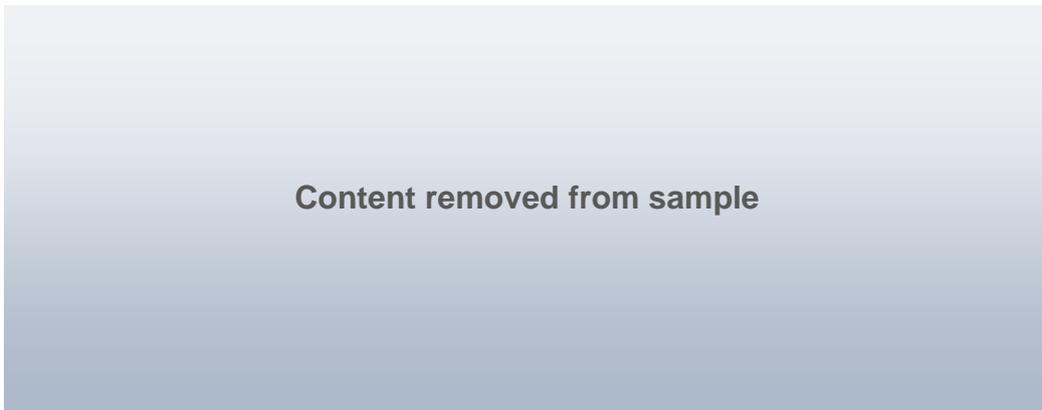
Health-related deaths



Blood pressure and cholesterol levels



Diabetes prevalence



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DISCLAIMER

Forecast and scenario closing date: 24 June 2024

Report closing date: 15 November 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

Euromonitor International's newly launched health and wellness (HW) system has been built using the proprietary attribute-tracking capabilities of our data science-based Via platform, in conjunction with our market-leading Passport database. This new system is underpinned by decades-long experience of tracking the HW industry and its evolving trends.

HW HOT DRINKS IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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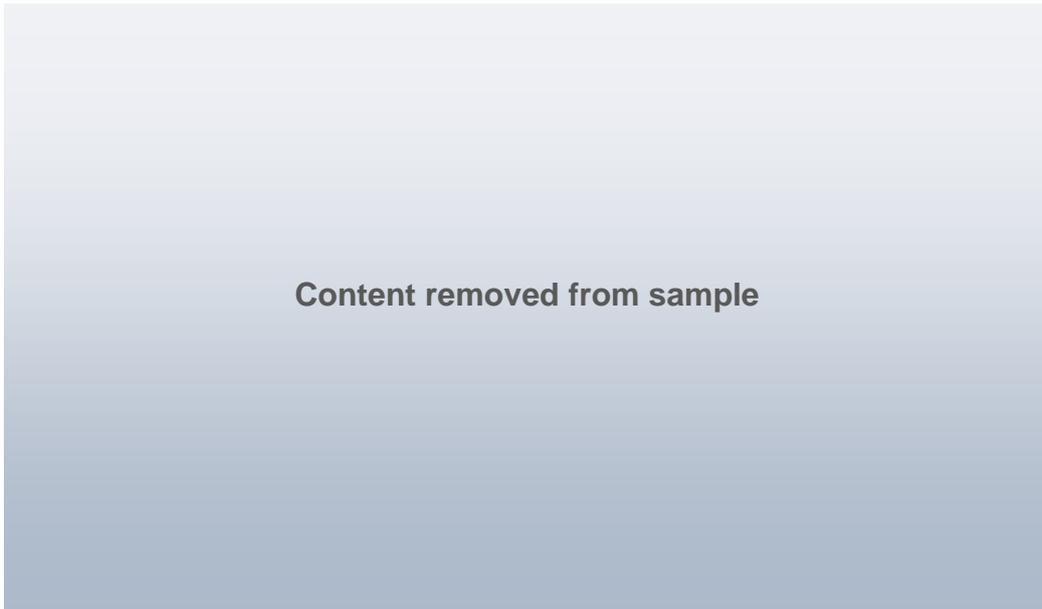
2023 DEVELOPMENTS

Vegan claim enters hot drinks in south africa

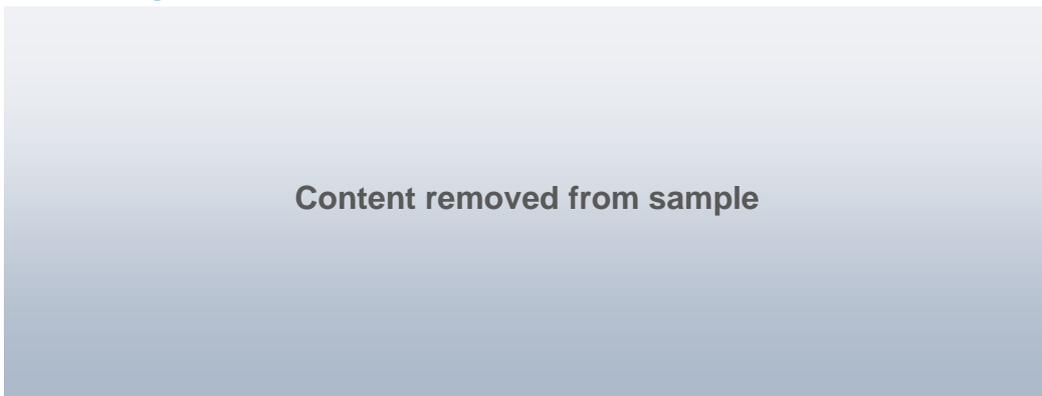
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No caffeine is leading health and wellness claim in hot drinks in south africa

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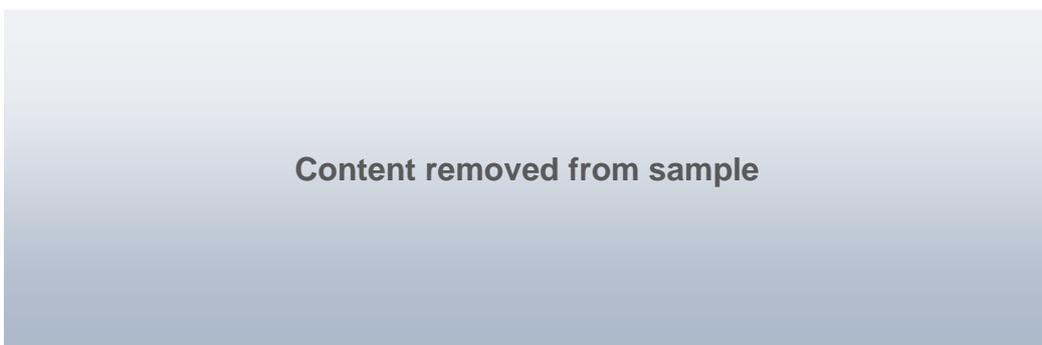


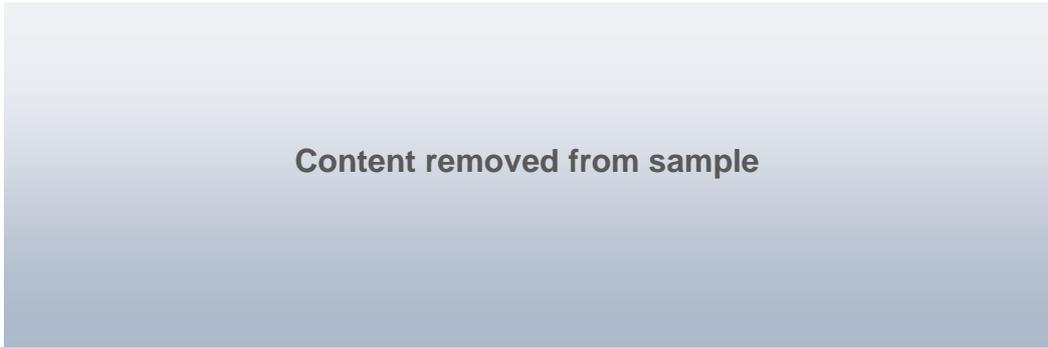
Natural remains strong claim as consumers look to reduce intake of artificial ingredients



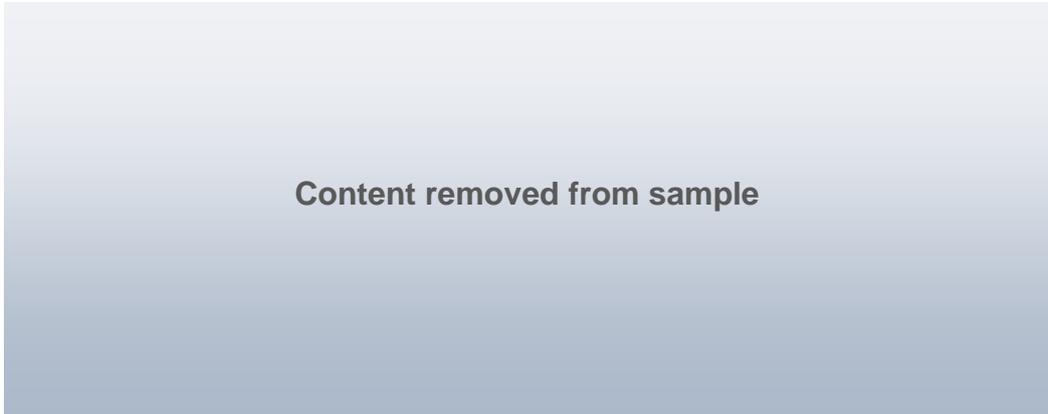
PROSPECTS AND OPPORTUNITIES

Rooibos tea expected to help drive future growth of hot drinks due to various health and wellness claims

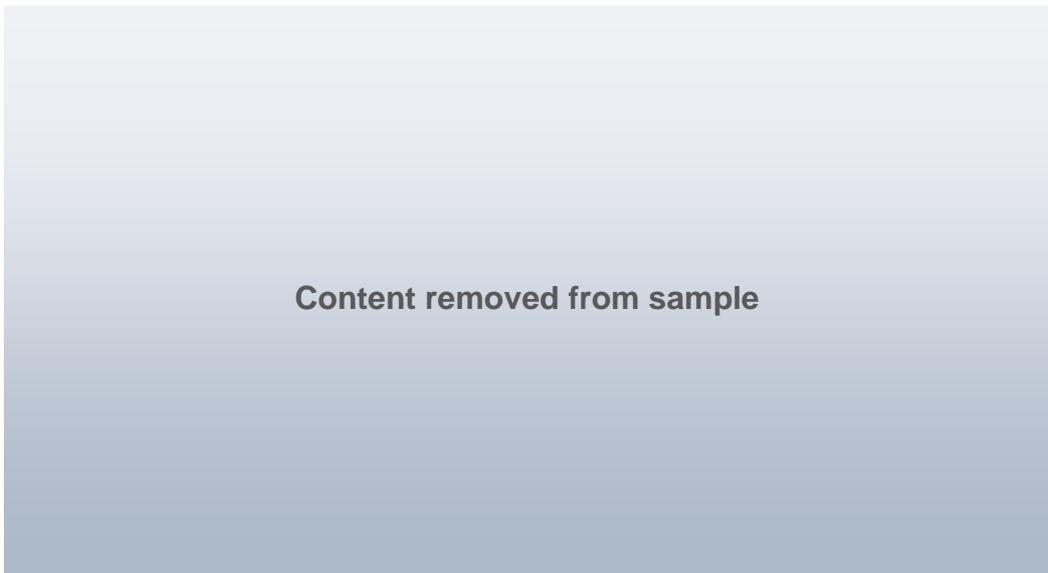




Further growth for weight management claim due to rising obesity concerns in south africa



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

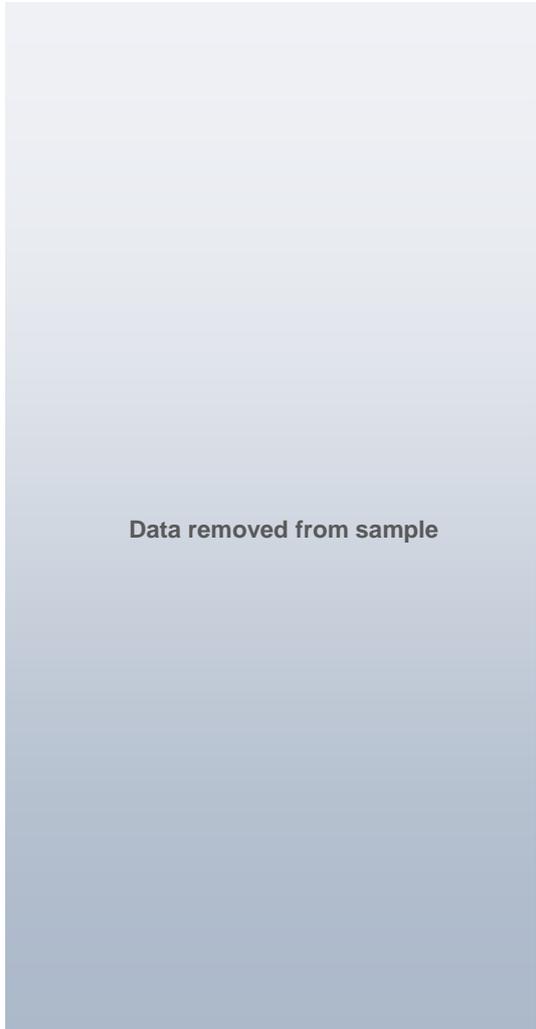
ZAR million	2019	2020	2021	2022	2023
-- Low Fat Hot Drinks	Data removed from sample				
-- Low Salt Hot Drinks					
-- Low Sugar Hot Drinks					
-- No Added Sugar Hot Drinks					
-- No Caffeine Hot Drinks					
-- No Fat Hot Drinks					
-- No Salt Hot Drinks					
-- No Sugar Hot Drinks					
-- Dairy Free Hot Drinks					
-- Gluten Free Hot Drinks					
-- Hypoallergenic Hot Drinks					
-- Keto Hot Drinks					
-- Lactose Free Hot Drinks					
-- Meat Free Hot Drinks					
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-- Brain Health and Memory Hot Drinks					
-- Cardiovascular Health Hot Drinks					
-- Digestive Health Hot Drinks					
-- Energy Boosting Hot Drinks					
-- Immune Support Hot Drinks					
-- Skin Health Hot Drinks					
-- Vision Health Hot Drinks					
- Natural Hot Drinks					
- Organic Hot Drinks					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2023

% current value growth

	2022/23	2019-23 CAGR	2019/23 Total
-- Low Fat Hot Drinks			
-- Low Salt Hot Drinks			
-- Low Sugar Hot Drinks			
-- No Added Sugar Hot Drinks			
-- No Caffeine Hot Drinks			
-- No Fat Hot Drinks			
-- No Salt Hot Drinks			
-- No Sugar Hot Drinks			
-- Dairy Free Hot Drinks			
-- Gluten Free Hot Drinks			
-- Hypoallergenic Hot Drinks			
-- Keto Hot Drinks			
-- Lactose Free Hot Drinks			
-- Meat Free Hot Drinks			
-- No Allergens Hot Drinks			
-- Plant-based Hot Drinks			
-- Vegan Hot Drinks			
-- Vegetarian Hot Drinks			
-- Weight Management Hot Drinks			
-- Good Source of Antioxidants Hot Drinks			
-- Good Source of Minerals Hot Drinks			
-- Good Source of Omega 3s Hot Drinks			
-- Good Source of Vitamins Hot Drinks			
-- High Fibre Hot Drinks			
-- High Protein Hot Drinks			
-- Probiotic Hot Drinks			
-- Superfruit Hot Drinks			
-- Bone and Joint Health Hot Drinks			
-- Brain Health and Memory Hot Drinks			
-- Cardiovascular Health Hot Drinks			
-- Digestive Health Hot Drinks			
-- Energy Boosting Hot Drinks			
-- Immune Support Hot Drinks			
-- Skin Health Hot Drinks			
-- Vision Health Hot Drinks			
- Natural Hot Drinks			
- Organic Hot Drinks			



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2023

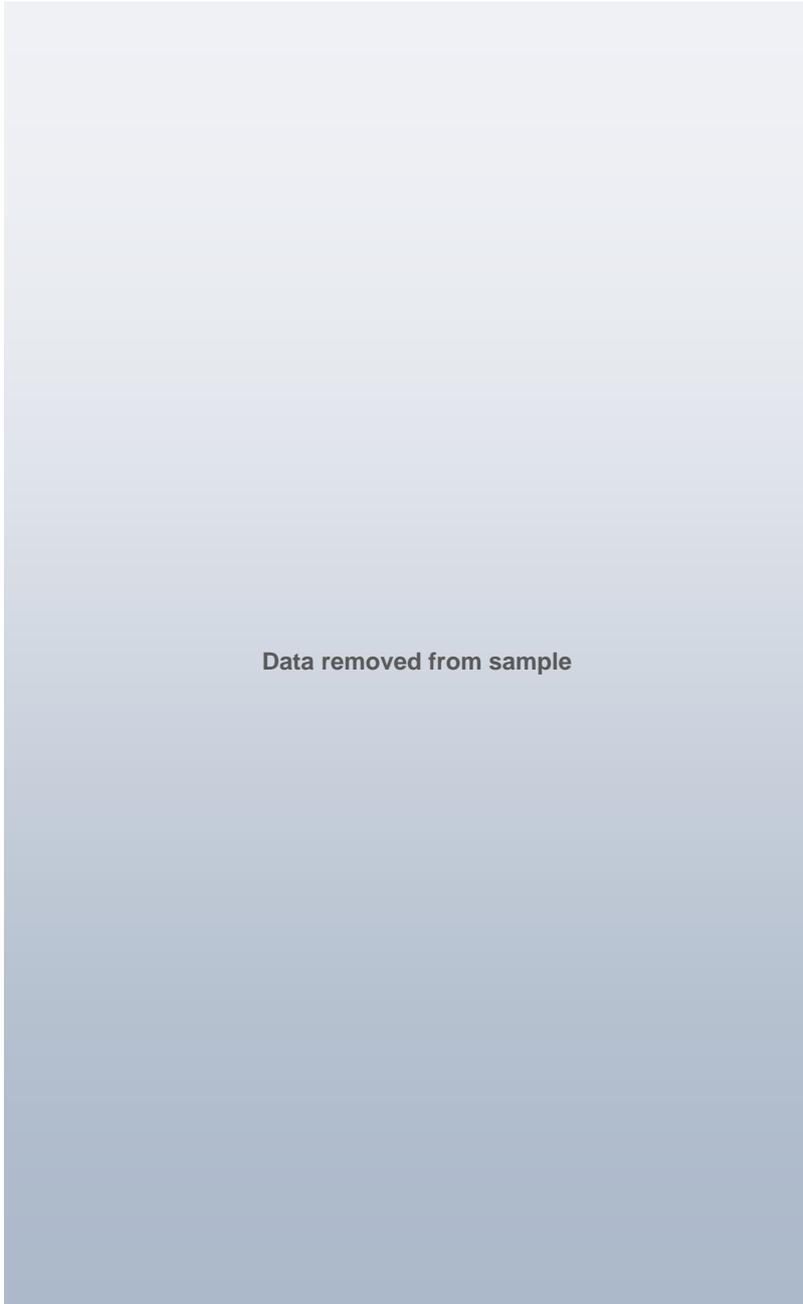
% retail value rsp Company	2019	2020	2021	2022	2023
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-- Low Fat Hot Drinks	Data removed from sample					
-- Low Salt Hot Drinks						
-- Low Sugar Hot Drinks						
-- No Added Sugar Hot Drinks						
-- No Caffeine Hot Drinks						
-- No Fat Hot Drinks						

- No Salt Hot Drinks
- No Sugar Hot Drinks
- Dairy Free Hot Drinks
- Gluten Free Hot Drinks
- Hypoallergenic Hot Drinks
- Keto Hot Drinks
- Lactose Free Hot Drinks
- Meat Free Hot Drinks
- No Allergens Hot Drinks
- Plant-based Hot Drinks
- Vegan Hot Drinks
- Vegetarian Hot Drinks
- Weight Management Hot Drinks
- Good Source of Antioxidants Hot Drinks
- Good Source of Minerals Hot Drinks
- Good Source of Omega 3s Hot Drinks
- Good Source of Vitamins Hot Drinks
- High Fibre Hot Drinks
- High Protein Hot Drinks
- Probiotic Hot Drinks
- Superfruit Hot Drinks
- Bone and Joint Health Hot Drinks
- Brain Health and Memory Hot Drinks
- Cardiovascular Health Hot Drinks
- Digestive Health Hot Drinks
- Energy Boosting Hot Drinks
- Immune Support Hot Drinks
- Skin Health Hot Drinks
- Vision Health Hot Drinks
- Natural Hot Drinks
- Organic Hot Drinks



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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2023-2028

% constant value growth

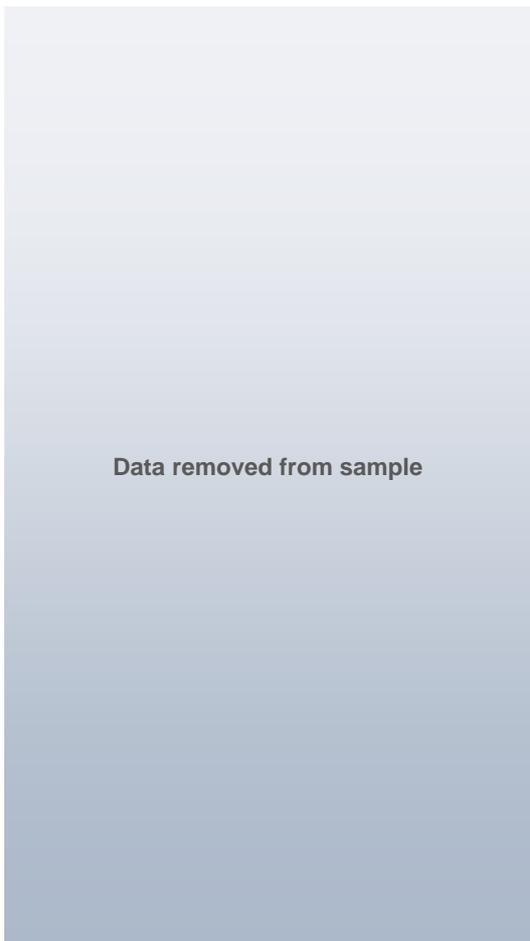
2023/2024 2023-28 CAGR 2023/28 Total

- Low Fat Hot Drinks
- Low Salt Hot Drinks
- Low Sugar Hot Drinks



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- No Added Sugar Hot Drinks
- No Caffeine Hot Drinks
- No Fat Hot Drinks
- No Salt Hot Drinks
- No Sugar Hot Drinks
- Dairy Free Hot Drinks
- Gluten Free Hot Drinks
- Hypoallergenic Hot Drinks
- Keto Hot Drinks
- Lactose Free Hot Drinks
- Meat Free Hot Drinks
- No Allergens Hot Drinks
- Plant-based Hot Drinks
- Vegan Hot Drinks
- Vegetarian Hot Drinks
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- Vision Health Hot Drinks
- Natural Hot Drinks
- Organic Hot Drinks

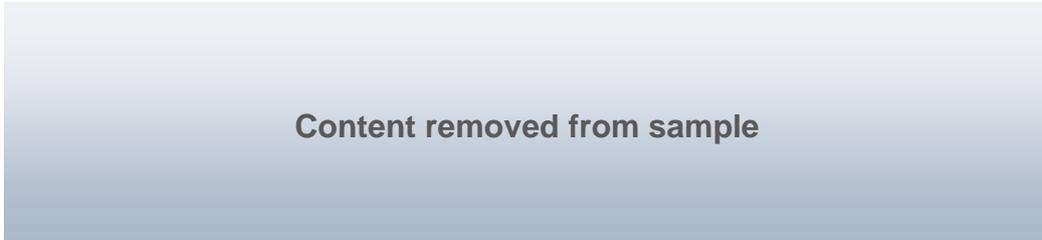


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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

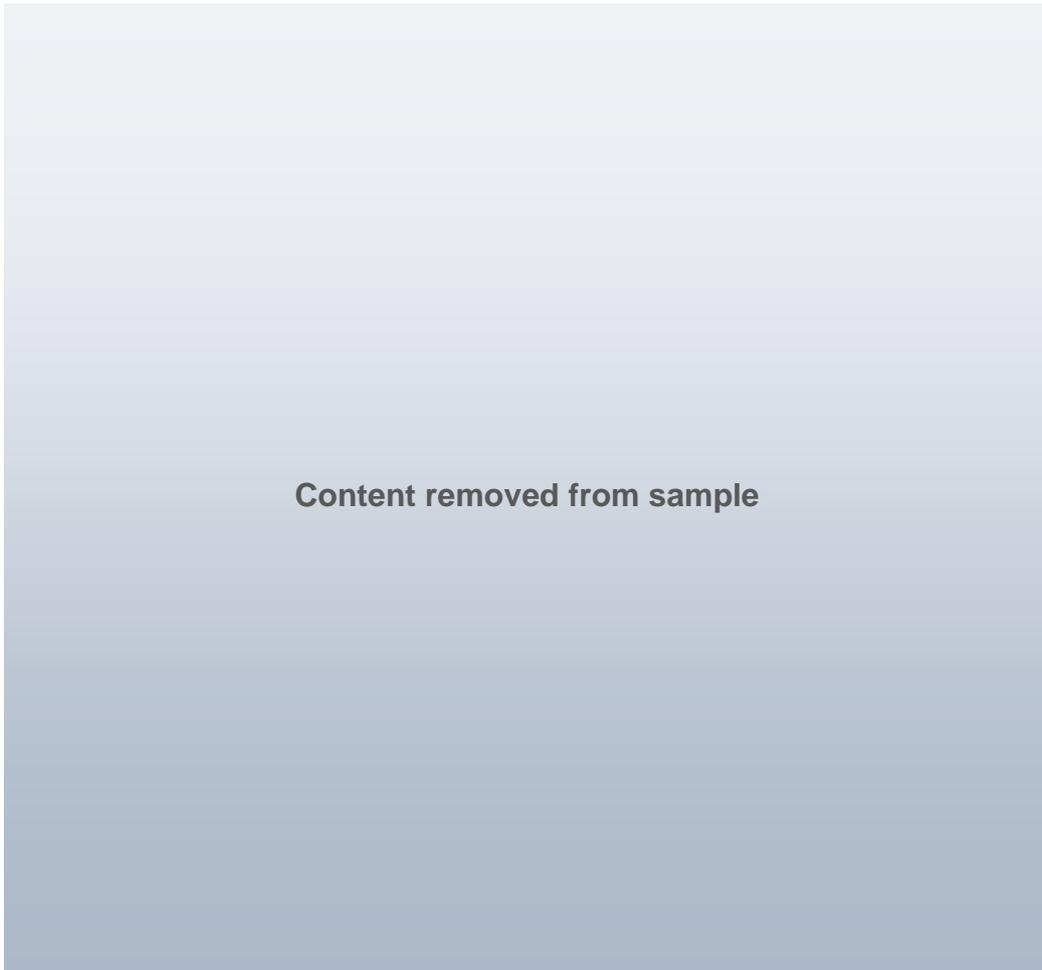
HW SOFT DRINKS IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

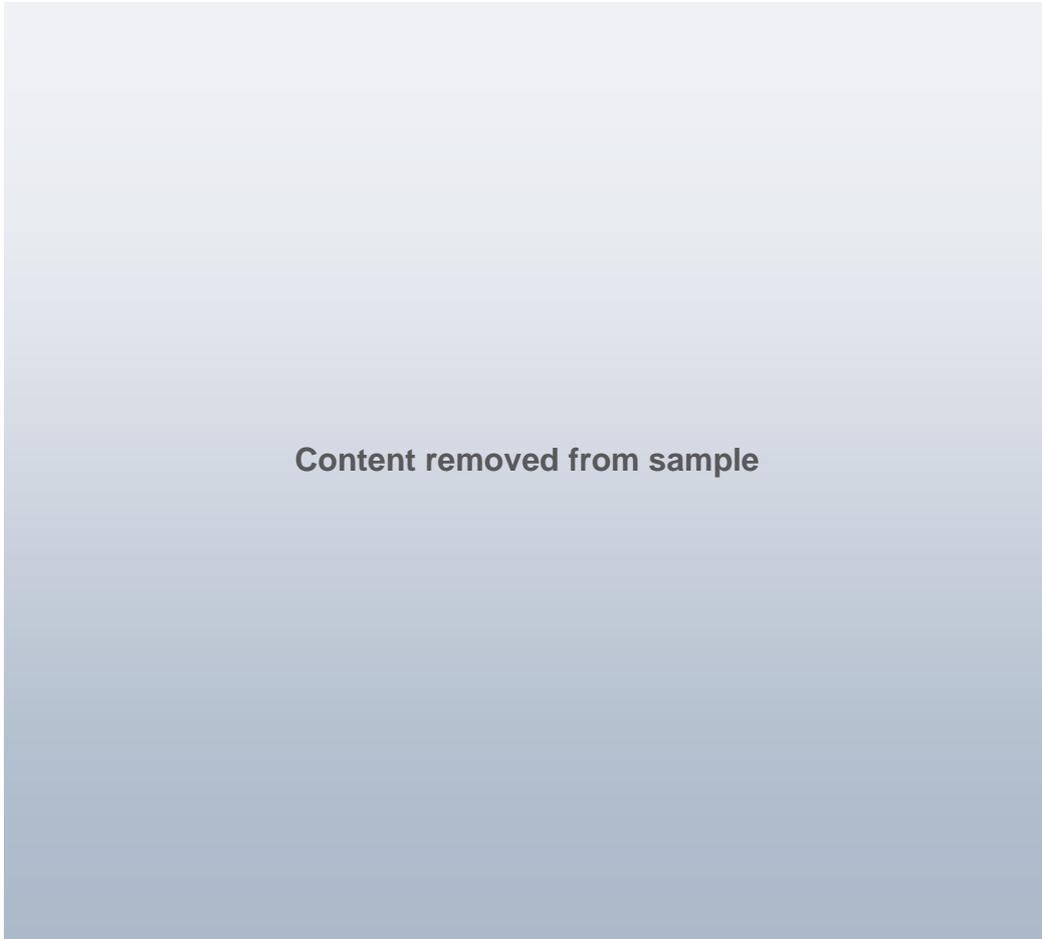


2023 DEVELOPMENTS

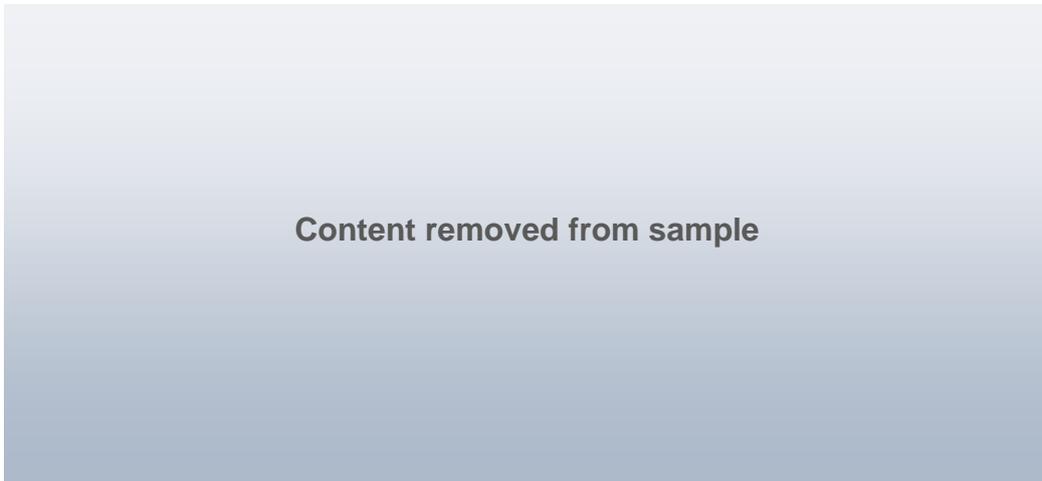
Energy boosting is leading claim in health and wellness soft drinks, encouraging new brands to enter



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



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PROSPECTS AND OPPORTUNITIES

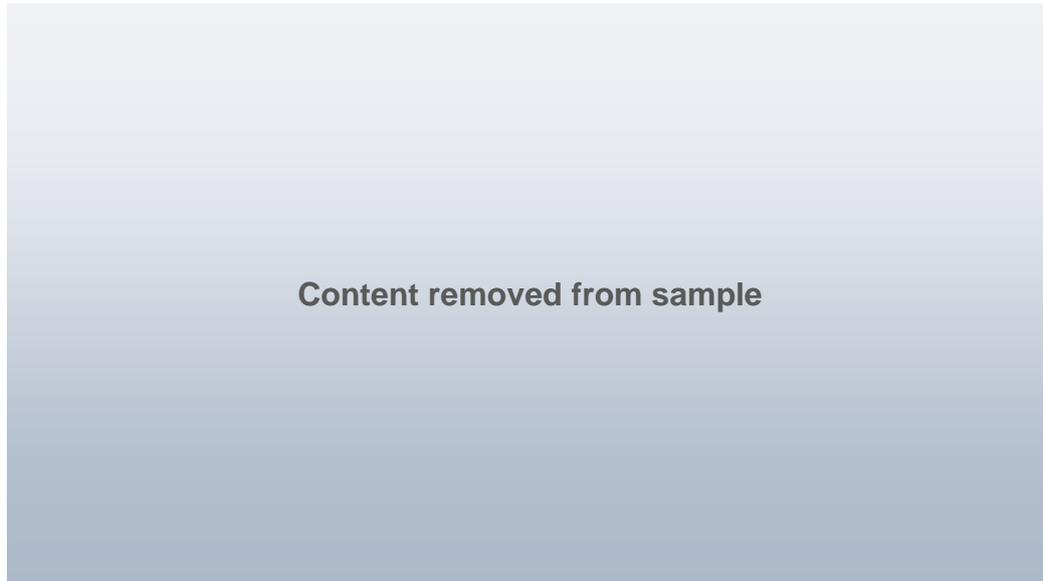
Impending new sugar tax expected to positively impact soft drinks with better for you claims

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Rising interest for immune support in health and wellness soft drinks

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No caffeine to remain relevant health and wellness claim within soft drinks



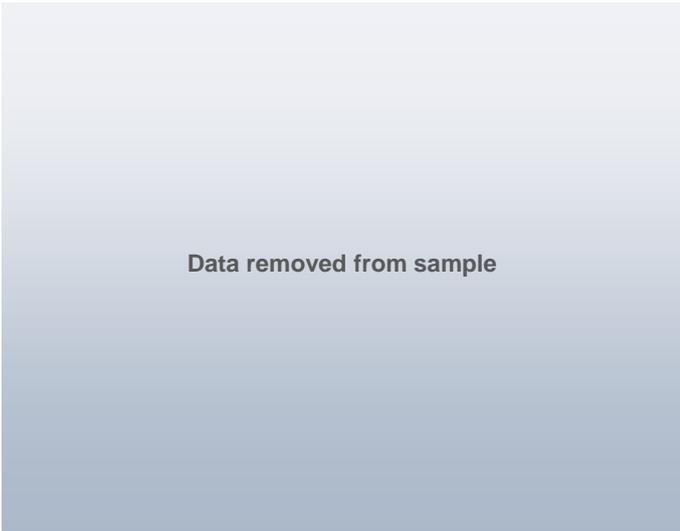
CATEGORY DATA

Table 9 Sales of Soft Drinks by Health and Wellness Type: Value 2019-2023

ZAR million

	2019	2020	2021	2022	2023
-- Low Fat Soft Drinks	Data removed from sample				
-- Low Salt Soft Drinks					
-- Low Sugar Soft Drinks					
-- No Added Sugar Soft Drinks					
-- No Caffeine Soft Drinks					
-- No Fat Soft Drinks					
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-- Good Source of Vitamins Soft Drinks					

- High Fibre Soft Drinks
- High Protein Soft Drinks
- Probiotic Soft Drinks
- Superfruit Soft Drinks
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- Digestive Health Soft Drinks
- Energy Boosting Soft Drinks
- Immune Support Soft Drinks
- Skin Health Soft Drinks
- Natural Soft Drinks
- Organic Soft Drinks



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2023

% current value growth

	2022/23	2019-23 CAGR	2019/23 Total
-- Low Fat Soft Drinks			
-- Low Salt Soft Drinks			
-- Low Sugar Soft Drinks			
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-- Digestive Health Soft Drinks			
-- Energy Boosting Soft Drinks			
-- Immune Support Soft Drinks			
-- Skin Health Soft Drinks			



- Natural Soft Drinks
- Organic Soft Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

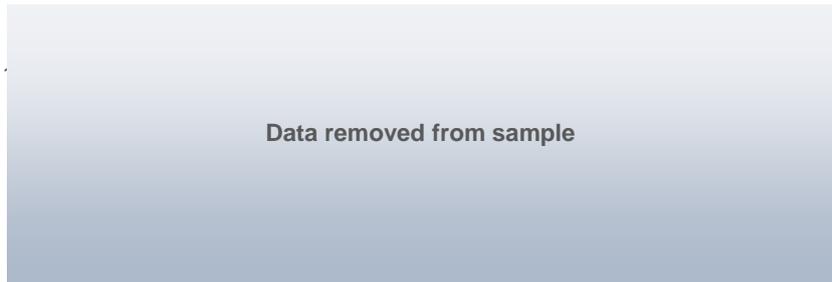
Table 15 Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-------------	------	------	------	------	------	------

- Low Fat Soft Drinks
- Low Salt Soft Drinks
- Low Sugar Soft Drinks
- No Added Sugar Soft Drinks
- No Caffeine Soft Drinks
- No Fat Soft Drinks
- No Salt Soft Drinks
- No Sugar Soft Drinks
- Dairy Free Soft Drinks
- Gluten Free Soft Drinks
- Hypoallergenic Soft Drinks
- Keto Soft Drinks
- Lactose Free Soft Drinks
- No Allergens Soft Drinks
- Plant-based Soft Drinks
- Vegan Soft Drinks
- Vegetarian Soft Drinks
- Weight Management Soft Drinks
- Good Source of Antioxidants Soft Drinks
- Good Source of Minerals Soft Drinks
- Good Source of Vitamins Soft Drinks
- High Fibre Soft Drinks
- High Protein Soft Drinks
- Probiotic Soft Drinks
- Superfruit Soft Drinks
- Bone and Joint Health Soft Drinks
- Brain Health and Memory Soft Drinks
- Cardiovascular Health Soft Drinks

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- Digestive Health Soft Drinks
- Energy Boosting Soft Drinks
- Immune Support Soft Drinks
- Skin Health Soft Drinks
- Natural Soft Drinks
- Organic Soft Drinks



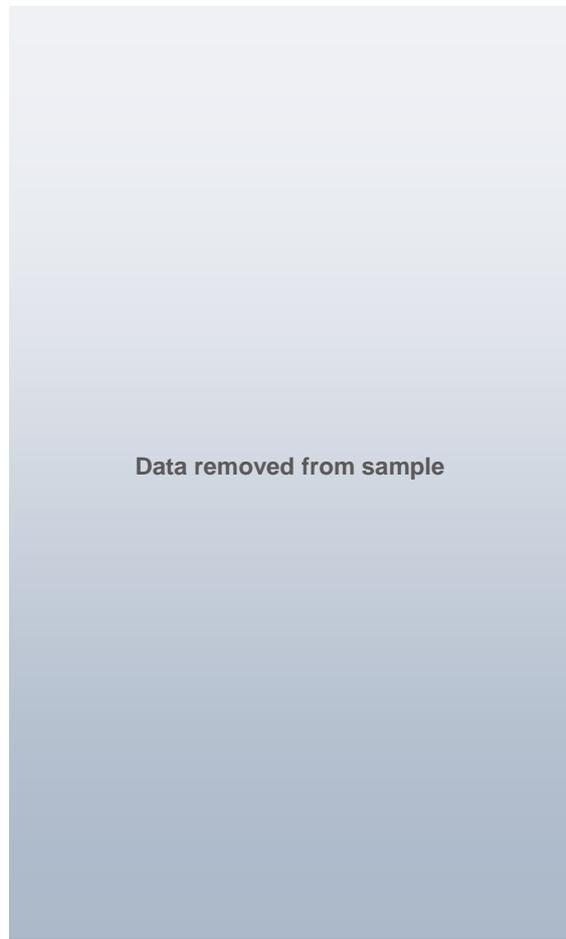
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Low Fat Soft Drinks
- Low Salt Soft Drinks
- Low Sugar Soft Drinks
- No Added Sugar Soft Drinks
- No Caffeine Soft Drinks
- No Fat Soft Drinks
- No Salt Soft Drinks
- No Sugar Soft Drinks
- Dairy Free Soft Drinks
- Gluten Free Soft Drinks
- Hypoallergenic Soft Drinks
- Keto Soft Drinks
- Lactose Free Soft Drinks
- No Allergens Soft Drinks
- Plant-based Soft Drinks
- Vegan Soft Drinks
- Vegetarian Soft Drinks
- Weight Management Soft Drinks
- Good Source of Antioxidants Soft Drinks
- Good Source of Minerals Soft Drinks
- Good Source of Vitamins Soft Drinks
- High Fibre Soft Drinks
- High Protein Soft Drinks
- Probiotic Soft Drinks
- Superfruit Soft Drinks
- Bone and Joint Health Soft Drinks
- Brain Health and Memory Soft Drinks
- Cardiovascular Health Soft Drinks
- Digestive Health Soft Drinks
- Energy Boosting Soft Drinks
- Immune Support Soft Drinks
- Skin Health Soft Drinks
- Natural Soft Drinks
- Organic Soft Drinks



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

HW SNACKS IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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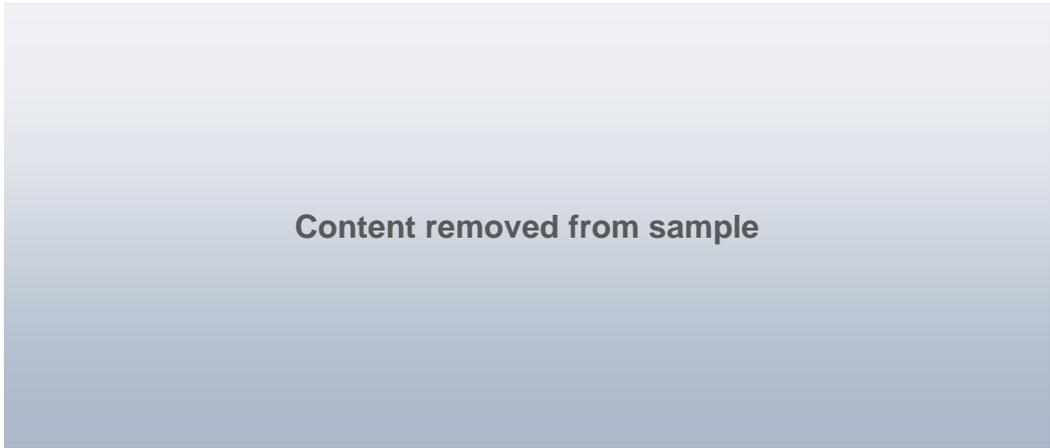
2023 DEVELOPMENTS

Gluten free is leading claim in health and wellness snacks in south africa

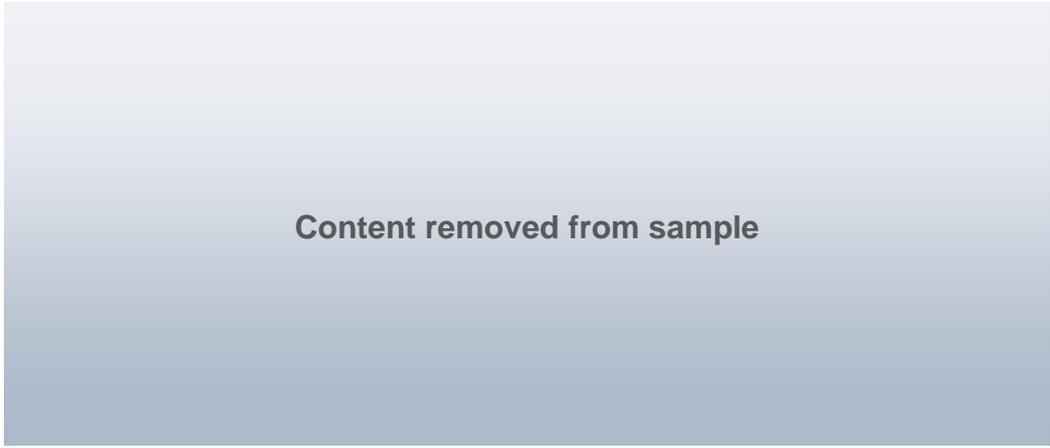
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Rising interest in plant-based claim in health and wellness snacks

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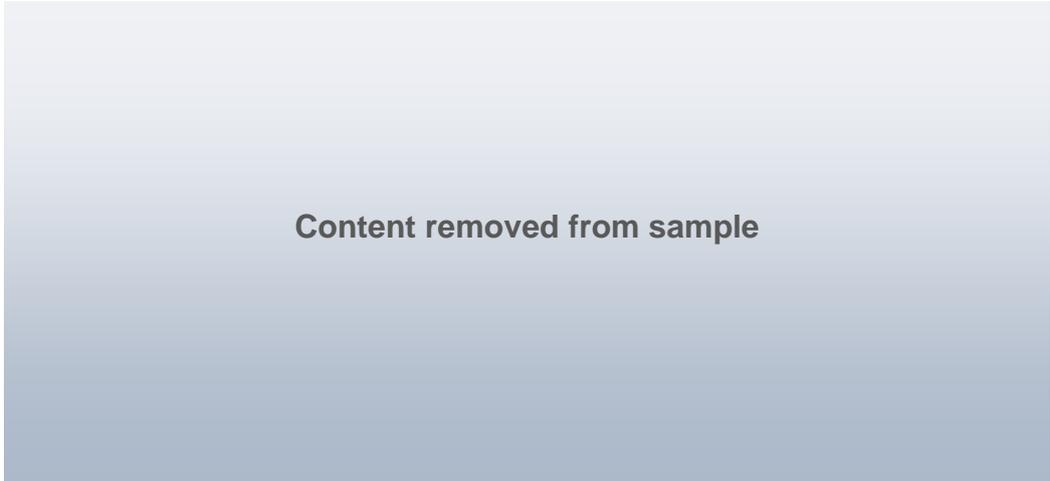


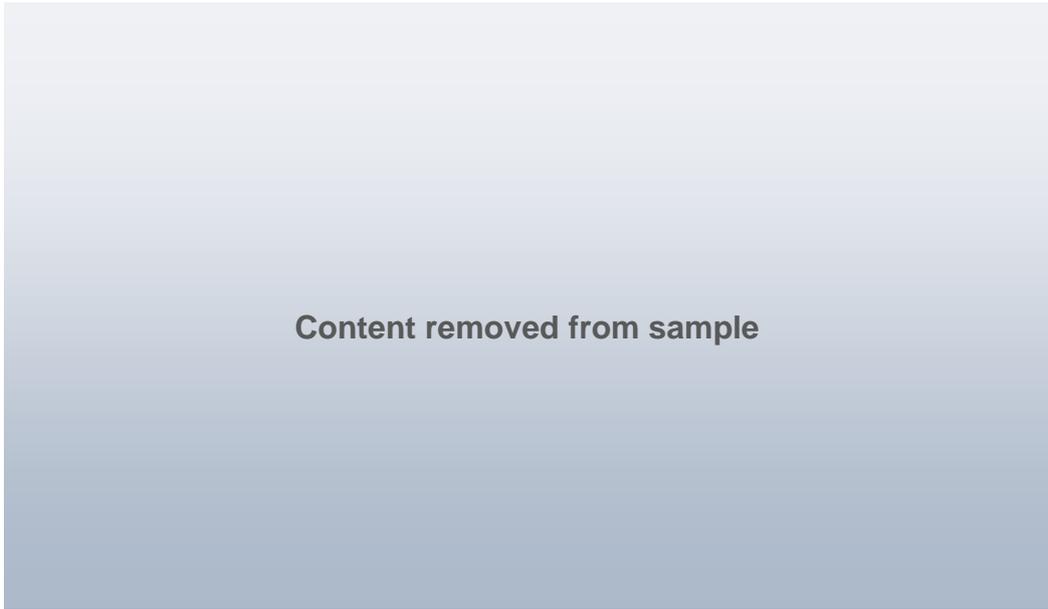
Cross-category expansion as weet-bix looks to leverage high fibre snack trend



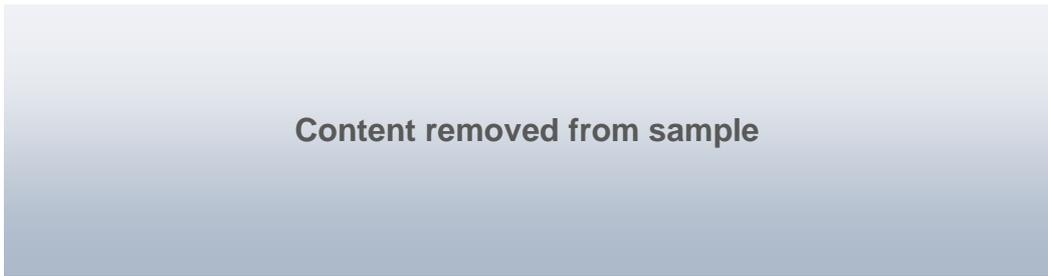
PROSPECTS AND OPPORTUNITIES

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



performance of these snacks that are high in protein as consumers look to sustain their energy levels between meals.

CATEGORY DATA

Table 17 Sales of Snacks by Health and Wellness Type: Value 2019-2023

ZAR million	2019	2020	2021	2022	2023
-- Low Fat Snacks	Data removed from sample				
-- Low Salt Snacks					
-- Low Sugar Snacks					
-- No Added Sugar Snacks					
-- No Caffeine Snacks					
-- No Fat Snacks					
-- No Salt Snacks					
-- No Sugar Snacks					
-- Dairy Free Snacks					
-- Gluten Free Snacks					
-- Hypoallergenic Snacks					
-- Keto Snacks					
-- Lactose Free Snacks					
-- Meat Free Snacks					
-- No Allergens Snacks					
-- Plant-based Snacks					
-- Vegan Snacks					
-- Vegetarian Snacks					
-- Weight Management Snacks					
-- Good Source of Antioxidants Snacks					
-- Good Source of Minerals Snacks					
-- Good Source of Omega 3s Snacks					
-- Good Source of Vitamins Snacks					
-- High Fibre Snacks					
-- High Protein Snacks					
-- Probiotic Snacks					
-- Superfruit Snacks					
-- Bone and Joint Health Snacks					
-- Brain Health and Memory Snacks					
-- Cardiovascular Health Snacks					
-- Digestive Health Snacks					
-- Energy Boosting Snacks					
-- Immune Support Snacks					
-- Skin Health Snacks					
-- Vision Health Snacks					
- Natural Snacks					
- Organic Snacks					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2023

% current value growth	2022/23	2019-23 CAGR	2019/23 Total
-- Low Fat Snacks	Data removed from sample		
-- Low Salt Snacks			
-- Low Sugar Snacks			
-- No Added Sugar Snacks			
-- No Caffeine Snacks			
-- No Fat Snacks			
-- No Salt Snacks			
-- No Sugar Snacks			
-- Dairy Free Snacks			
-- Gluten Free Snacks			
-- Hypoallergenic Snacks			
-- Keto Snacks			
-- Lactose Free Snacks			
-- Meat Free Snacks			
-- No Allergens Snacks			
-- Plant-based Snacks			
-- Vegan Snacks			
-- Vegetarian Snacks			
-- Weight Management Snacks			
-- Good Source of Antioxidants Snacks			
-- Good Source of Minerals Snacks			
-- Good Source of Omega 3s Snacks			
-- Good Source of Vitamins Snacks			
-- High Fibre Snacks			
-- High Protein Snacks			
-- Probiotic Snacks			
-- Superfruit Snacks			
-- Bone and Joint Health Snacks			
-- Brain Health and Memory Snacks			
-- Cardiovascular Health Snacks			
-- Digestive Health Snacks			
-- Energy Boosting Snacks			
-- Immune Support Snacks			
-- Skin Health Snacks			
-- Vision Health Snacks			
- Natural Snacks			
- Organic Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample					
---------------------------------	--	--	--	--	--

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
----------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Forecast Sales of Snacks by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-------------	------	------	------	------	------	------

- Low Fat Snacks
- Low Salt Snacks
- Low Sugar Snacks
- No Added Sugar Snacks
- No Caffeine Snacks
- No Fat Snacks
- No Salt Snacks
- No Sugar Snacks
- Dairy Free Snacks
- Gluten Free Snacks
- Hypoallergenic Snacks
- Keto Snacks
- Lactose Free Snacks
- Meat Free Snacks
- No Allergens Snacks
- Plant-based Snacks
- Vegan Snacks
- Vegetarian Snacks
- Weight Management Snacks
- Good Source of Antioxidants Snacks
- Good Source of Minerals Snacks
- Good Source of Omega 3s Snacks
- Good Source of Vitamins Snacks
- High Fibre Snacks
- High Protein Snacks
- Probiotic Snacks
- Superfruit Snacks
- Bone and Joint Health Snacks
- Brain Health and Memory Snacks
- Cardiovascular Health Snacks
- Digestive Health Snacks
- Energy Boosting Snacks
- Immune Support Snacks

Data removed from sample

- Skin Health Snacks
- Vision Health Snacks
- Natural Snacks
- Organic Snacks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
-- Low Fat Snacks	Data removed from sample		
-- Low Salt Snacks			
-- Low Sugar Snacks			
-- No Added Sugar Snacks			
-- No Caffeine Snacks			
-- No Fat Snacks			
-- No Salt Snacks			
-- No Sugar Snacks			
-- Dairy Free Snacks			
-- Gluten Free Snacks			
-- Hypoallergenic Snacks			
-- Keto Snacks			
-- Lactose Free Snacks			
-- Meat Free Snacks			
-- No Allergens Snacks			
-- Plant-based Snacks			
-- Vegan Snacks			
-- Vegetarian Snacks			
-- Weight Management Snacks			
-- Good Source of Antioxidants Snacks			
-- Good Source of Minerals Snacks			
-- Good Source of Omega 3s Snacks			
-- Good Source of Vitamins Snacks			
-- High Fibre Snacks			
-- High Protein Snacks			
-- Probiotic Snacks			
-- Superfruit Snacks			
-- Bone and Joint Health Snacks			
-- Brain Health and Memory Snacks			
-- Cardiovascular Health Snacks			
-- Digestive Health Snacks			
-- Energy Boosting Snacks			
-- Immune Support Snacks			
-- Skin Health Snacks			
-- Vision Health Snacks			
- Natural Snacks			
- Organic Snacks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

HW DAIRY PRODUCTS AND ALTERNATIVES IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

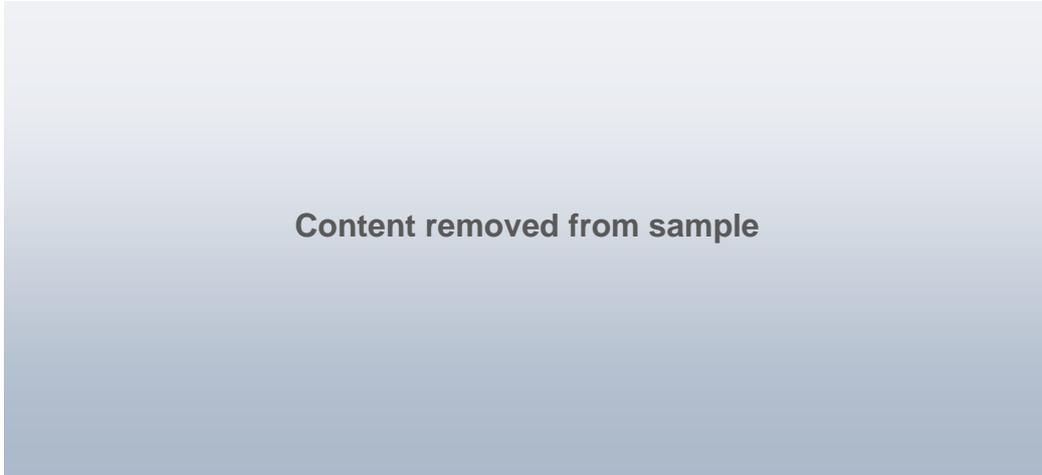
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2023 DEVELOPMENTS

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

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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



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Rising demand for lactose free to encourage further new product development

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Significant potential for low salt within dairy products and alternatives

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consumers increasingly looking at food attributes and seeking to reduce or avoid health issues linked to high salt intake, such as hypertension.

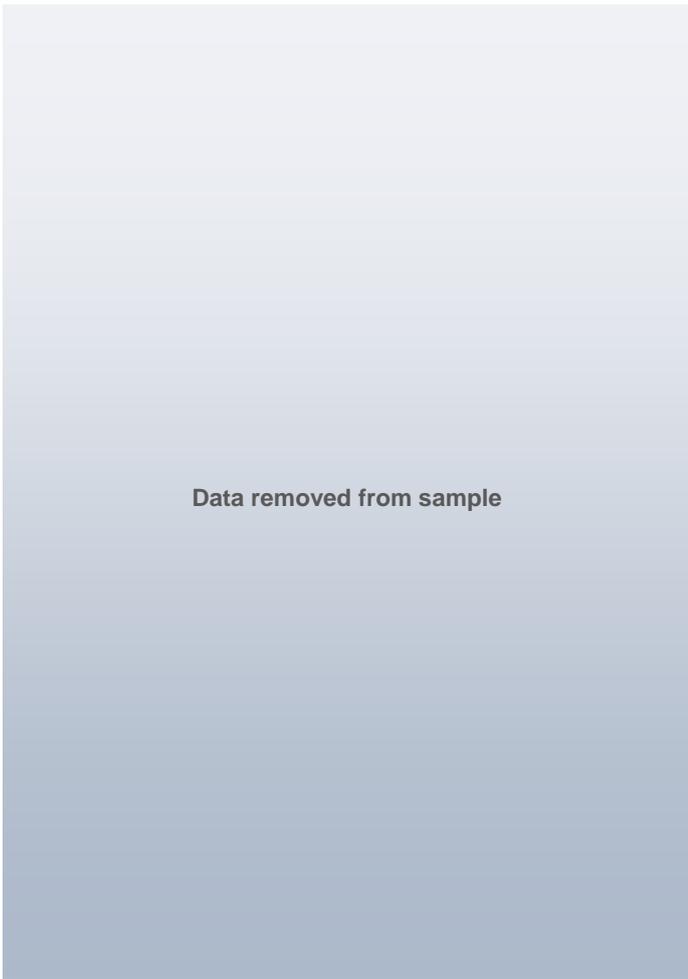
CATEGORY DATA

Table 26 Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2023

ZAR million

	2019	2020	2021	2022	2023
-- Low Fat Dairy Products and Alternatives	Data removed from sample				
-- Low Salt Dairy Products and Alternatives					
-- Low Sugar Dairy Products and Alternatives					
-- No Added Sugar Dairy Products and Alternatives					
-- No Caffeine Dairy Products and Alternatives					
-- No Fat Dairy Products and Alternatives					
-- No Salt Dairy Products and Alternatives					
-- No Sugar Dairy Products and Alternatives					
-- Dairy Free Dairy Products and Alternatives					
-- Gluten Free Dairy Products and Alternatives					
-- Hypoallergenic Dairy Products and Alternatives					
-- Keto Dairy Products and Alternatives					
-- Lactose Free Dairy Products and Alternatives					
-- No Allergens Dairy Products and Alternatives					
-- Plant-based Dairy Products and Alternatives					
-- Vegan Dairy Products and Alternatives					
-- Vegetarian Dairy Products and Alternatives					
-- Weight Management Dairy Products and Alternatives					
-- Good Source of Antioxidants Dairy Products and Alternatives					
-- Good Source of Minerals Dairy Products and Alternatives					
-- Good Source of Omega 3s Dairy Products and Alternatives					
-- Good Source of Plant					

- Sterols/Stanol Dairy Products and Alternatives
- Good Source of Vitamins Dairy Products and Alternatives
- High Fibre Dairy Products and Alternatives
- High Protein Dairy Products and Alternatives
- Probiotic Dairy Products and Alternatives
- Superfruit Dairy Products and Alternatives
- Bone and Joint Health Dairy Products and Alternatives
- Brain Health and Memory Dairy Products and Alternatives
- Cardiovascular Health Dairy Products and Alternatives
- Digestive Health Dairy Products and Alternatives
- Energy Boosting Dairy Products and Alternatives
- Immune Support Dairy Products and Alternatives
- Skin Health Dairy Products and Alternatives
- Vision Health Dairy Products and Alternatives
- Natural Dairy Products and Alternatives
- Organic Dairy Products and Alternatives



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2023

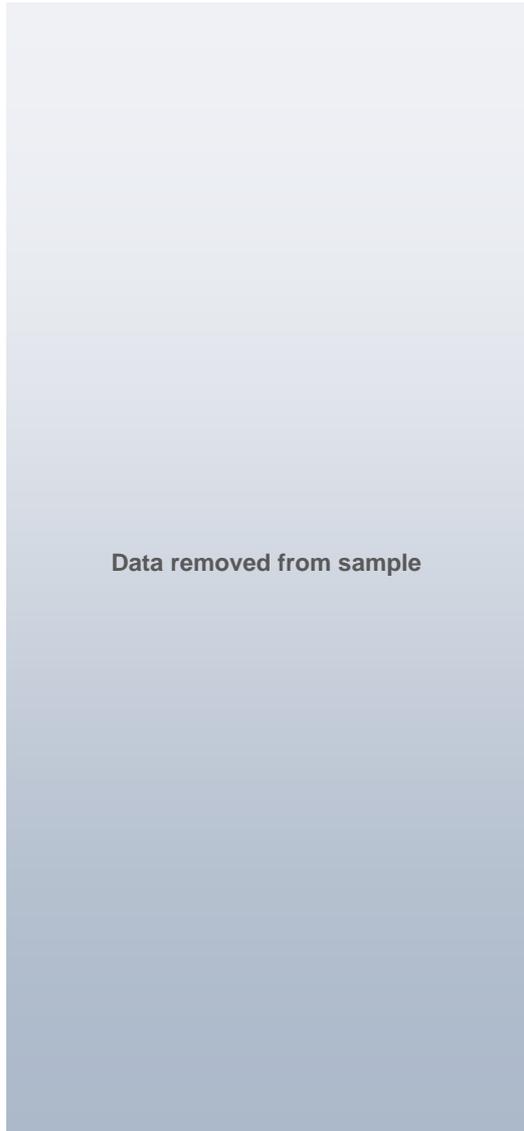
% current value growth

2022/23 2019-23 CAGR 2019/23 Total

- Low Fat Dairy Products and Alternatives
- Low Salt Dairy Products and Alternatives
- Low Sugar Dairy Products and Alternatives
- No Added Sugar Dairy Products and Alternatives
- No Caffeine Dairy Products and Alternatives
- No Fat Dairy Products and Alternatives
- No Salt Dairy Products and Alternatives
- No Sugar Dairy Products and Alternatives
- Dairy Free Dairy Products and Alternatives
- Gluten Free Dairy Products and Alternatives
- Hypoallergenic Dairy Products and Alternatives
- Keto Dairy Products and Alternatives



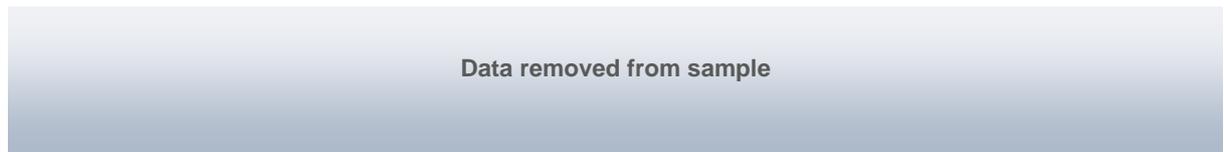
- Lactose Free Dairy Products and Alternatives
- No Allergens Dairy Products and Alternatives
- Plant-based Dairy Products and Alternatives
- Vegan Dairy Products and Alternatives
- Vegetarian Dairy Products and Alternatives
- Weight Management Dairy Products and Alternatives
- Good Source of Antioxidants Dairy Products and Alternatives
- Good Source of Minerals Dairy Products and Alternatives
- Good Source of Omega 3s Dairy Products and Alternatives
- Good Source of Plant Sterols/Stanoles Dairy Products and Alternatives
- Good Source of Vitamins Dairy Products and Alternatives
- High Fibre Dairy Products and Alternatives
- High Protein Dairy Products and Alternatives
- Probiotic Dairy Products and Alternatives
- Superfruit Dairy Products and Alternatives
- Bone and Joint Health Dairy Products and Alternatives
- Brain Health and Memory Dairy Products and Alternatives
- Cardiovascular Health Dairy Products and Alternatives
- Digestive Health Dairy Products and Alternatives
- Energy Boosting Dairy Products and Alternatives
- Immune Support Dairy Products and Alternatives
- Skin Health Dairy Products and Alternatives
- Vision Health Dairy Products and Alternatives
- Natural Dairy Products and Alternatives
- Organic Dairy Products and Alternatives



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 32 Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

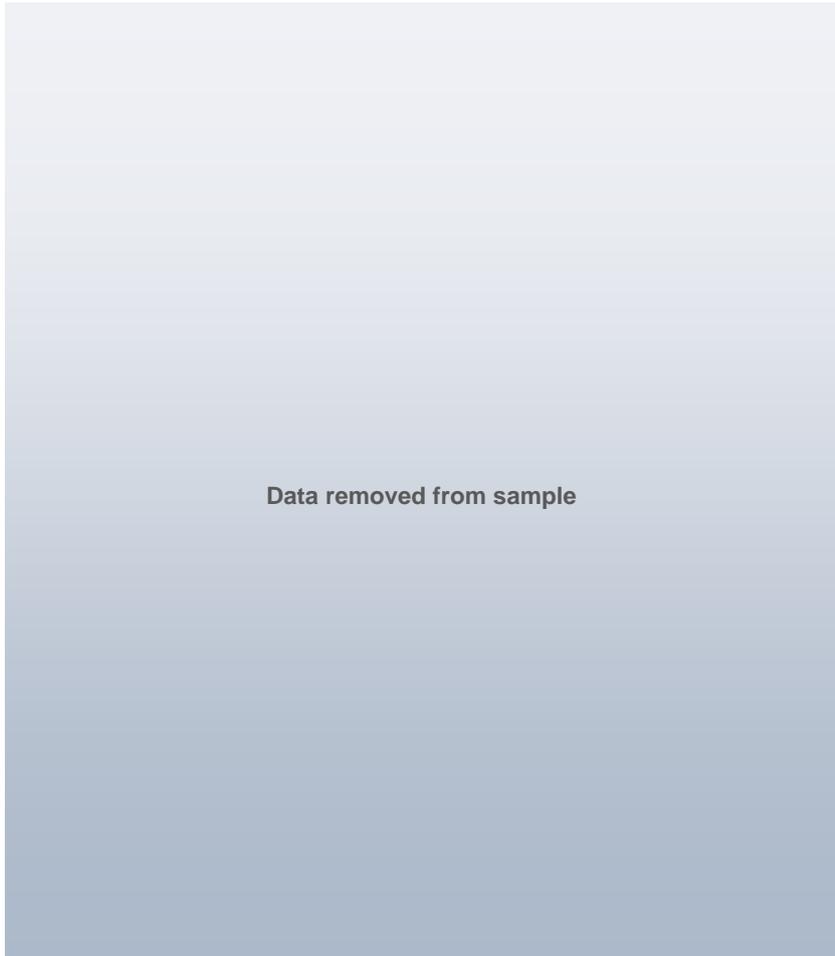
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 33 Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-- Low Fat Dairy Products and Alternatives	Data removed from sample					
-- Low Salt Dairy Products and Alternatives						
-- Low Sugar Dairy Products and Alternatives						
-- No Added Sugar Dairy Products and Alternatives						
-- No Caffeine Dairy Products and Alternatives						
-- No Fat Dairy Products and Alternatives						
-- No Salt Dairy Products and Alternatives						
-- No Sugar Dairy Products and Alternatives						
-- Dairy Free Dairy Products and Alternatives						
-- Gluten Free Dairy Products and Alternatives						
-- Hypoallergenic Dairy Products and Alternatives						
-- Keto Dairy Products and Alternatives						
-- Lactose Free Dairy Products and Alternatives						
-- No Allergens Dairy Products and Alternatives						
-- Plant-based Dairy Products and Alternatives						
-- Vegan Dairy Products and Alternatives						
-- Vegetarian Dairy Products and Alternatives						
-- Weight Management Dairy Products and Alternatives						
-- Good Source of Antioxidants Dairy Products and Alternatives						
-- Good Source of Minerals Dairy Products and Alternatives						
-- Good Source of Omega 3s Dairy Products and Alternatives						
-- Good Source of Plant Sterols/Stanoles Dairy Products and Alternatives						
-- Good Source of						

- Vitamins Dairy Products and Alternatives
- High Fibre Dairy Products and Alternatives
- High Protein Dairy Products and Alternatives
- Probiotic Dairy Products and Alternatives
- Superfruit Dairy Products and Alternatives
- Bone and Joint Health Dairy Products and Alternatives
- Brain Health and Memory Dairy Products and Alternatives
- Cardiovascular Health Dairy Products and Alternatives
- Digestive Health Dairy Products and Alternatives
- Energy Boosting Dairy Products and Alternatives
- Immune Support Dairy Products and Alternatives
- Skin Health Dairy Products and Alternatives
- Vision Health Dairy Products and Alternatives
- Natural Dairy Products and Alternatives
- Organic Dairy Products and Alternatives



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Forecast Sales of Dairy Products and Alternatives by Health and Wellness
 Type: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Low Fat Dairy Products and Alternatives
- Low Salt Dairy Products and Alternatives
- Low Sugar Dairy Products and Alternatives
- No Added Sugar Dairy Products and Alternatives
- No Caffeine Dairy Products and Alternatives
- No Fat Dairy Products and Alternatives
- No Salt Dairy Products and Alternatives
- No Sugar Dairy Products and Alternatives
- Dairy Free Dairy Products and Alternatives
- Gluten Free Dairy Products and Alternatives
- Hypoallergenic Dairy Products and Alternatives
- Keto Dairy Products and Alternatives
- Lactose Free Dairy Products and Alternatives



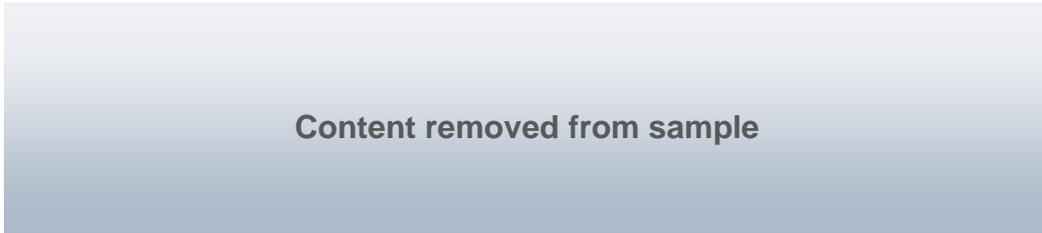
- Alternatives
- No Allergens Dairy Products and Alternatives
- Plant-based Dairy Products and Alternatives
- Vegan Dairy Products and Alternatives
- Vegetarian Dairy Products and Alternatives
- Weight Management Dairy Products and Alternatives
- Good Source of Antioxidants Dairy Products and Alternatives
- Good Source of Minerals Dairy Products and Alternatives
- Good Source of Omega 3s Dairy Products and Alternatives
- Good Source of Plant Sterols/Stanoles Dairy Products and Alternatives
- Good Source of Vitamins Dairy Products and Alternatives
- High Fibre Dairy Products and Alternatives
- High Protein Dairy Products and Alternatives
- Probiotic Dairy Products and Alternatives
- Superfruit Dairy Products and Alternatives
- Bone and Joint Health Dairy Products and Alternatives
- Brain Health and Memory Dairy Products and Alternatives
- Cardiovascular Health Dairy Products and Alternatives
- Digestive Health Dairy Products and Alternatives
- Energy Boosting Dairy Products and Alternatives
- Immune Support Dairy Products and Alternatives
- Skin Health Dairy Products and Alternatives
- Vision Health Dairy Products and Alternatives
- Natural Dairy Products and Alternatives
- Organic Dairy Products and Alternatives

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

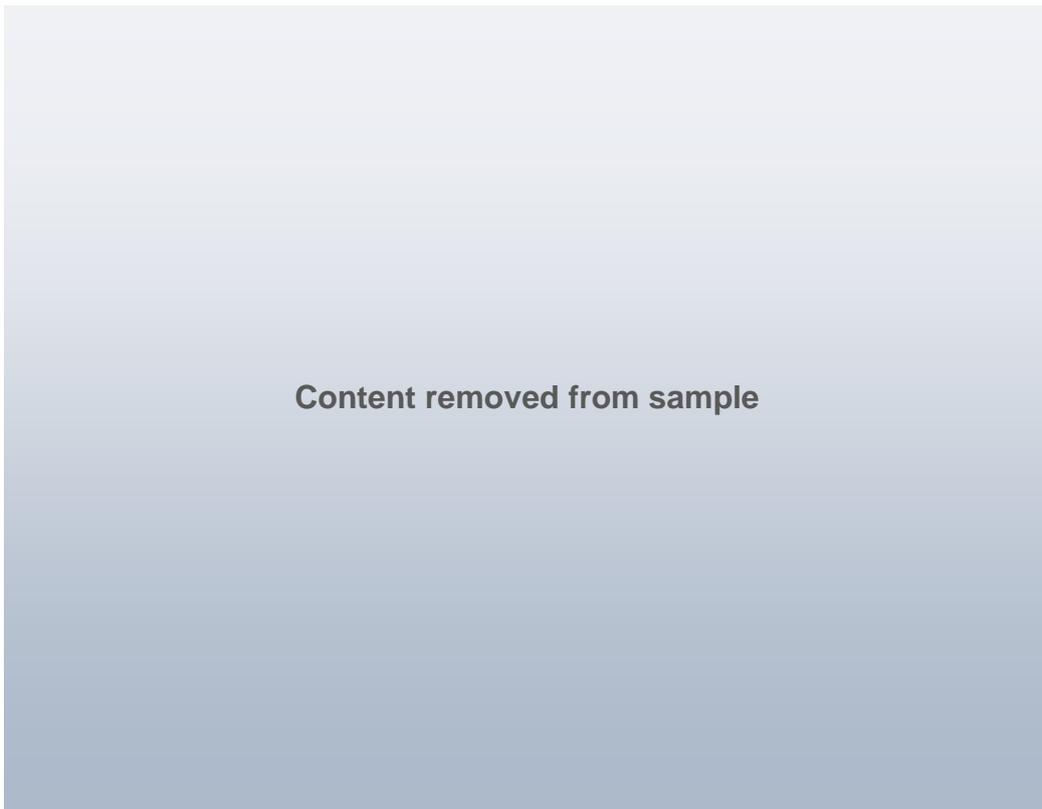
HW COOKING INGREDIENTS AND MEALS IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS



2023 DEVELOPMENTS

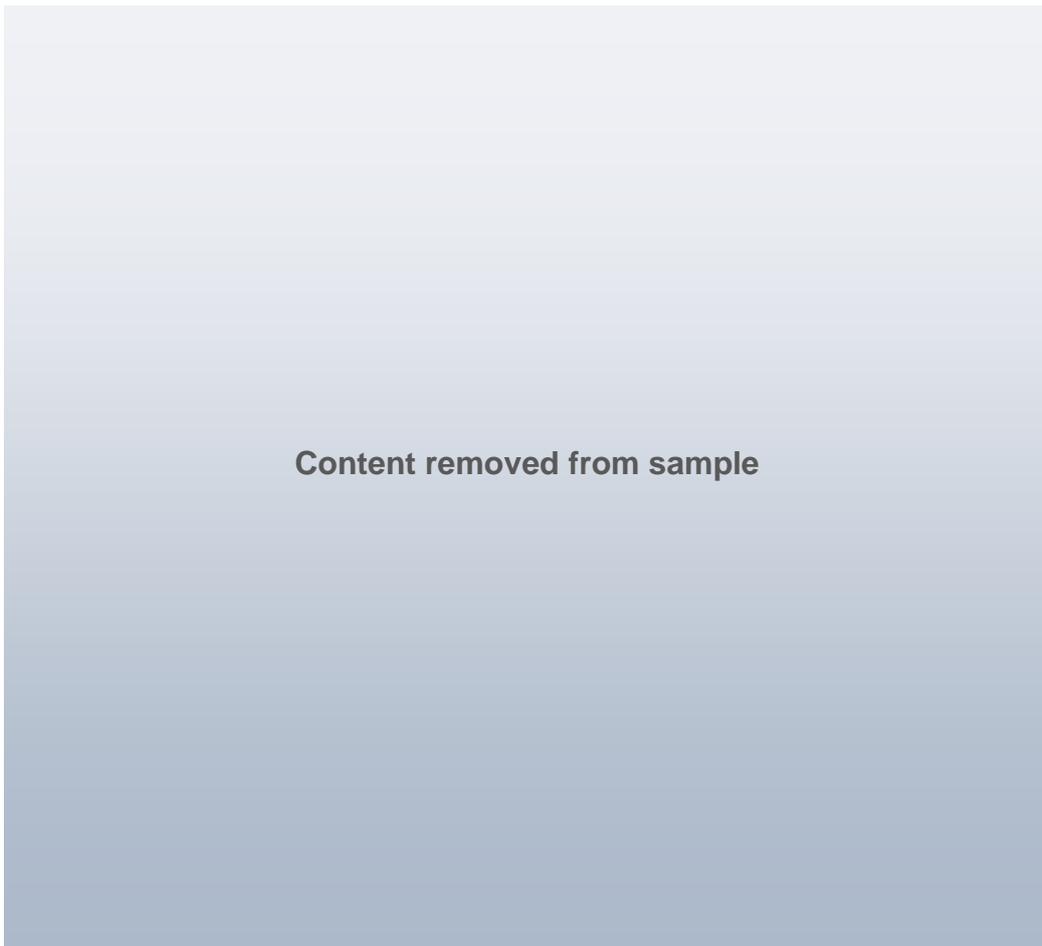
Vegetarian is leading claim, addressing environmental and animal welfare concerns



Younger generation continues to drive demand for plant-based options



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



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PROSPECTS AND OPPORTUNITIES

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

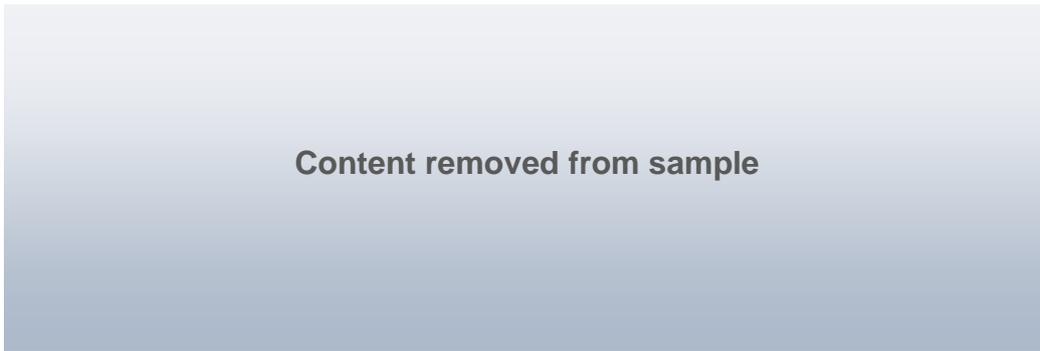
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Vegetarian to remain leading claim in health and wellness cooking ingredients and meals over the forecast period

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Solid performance for natural honey due to perceptions of higher quality

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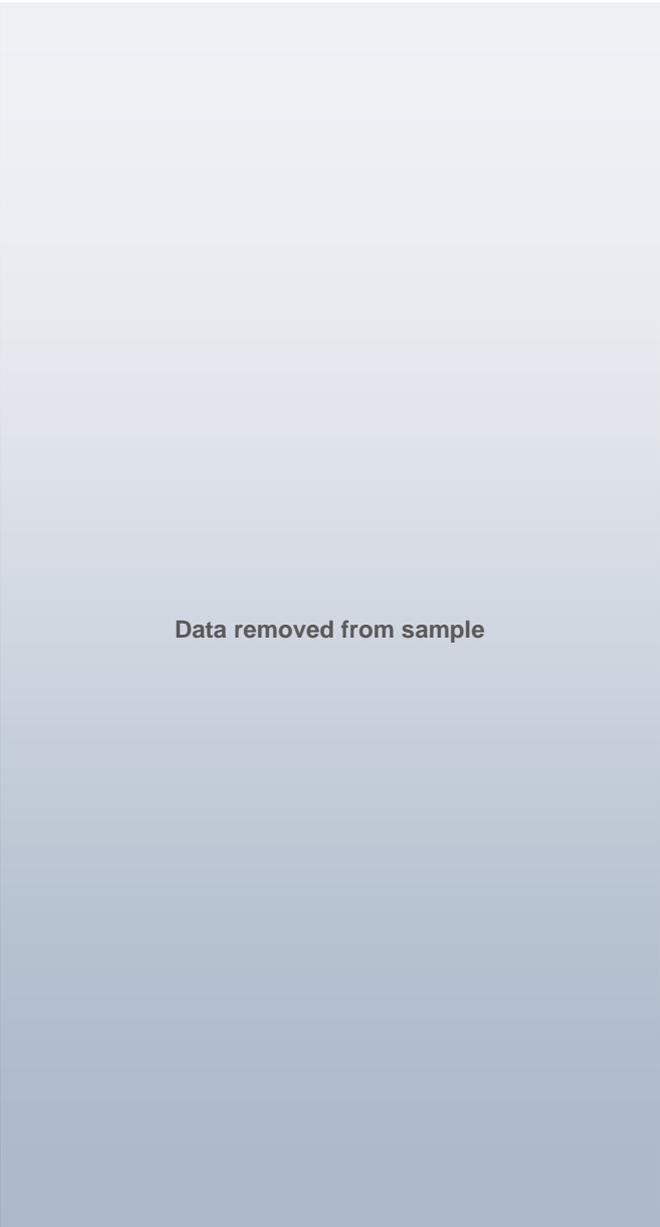
CATEGORY DATA

Table 35 Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2023

ZAR million

	2019	2020	2021	2022	2023
-- Low Fat Cooking Ingredients and Meals	Data removed from sample				
-- Low Salt Cooking Ingredients and Meals					
-- Low Sugar Cooking Ingredients and Meals					
-- No Added Sugar Cooking Ingredients and Meals					
-- No Caffeine Cooking Ingredients and Meals					
-- No Fat Cooking Ingredients and Meals					
-- No Salt Cooking Ingredients and Meals					
-- No Sugar Cooking Ingredients and Meals					
-- Dairy Free Cooking Ingredients and Meals					
-- Gluten Free Cooking Ingredients and Meals					
-- Hypoallergenic Cooking Ingredients and Meals					
-- Keto Cooking Ingredients and Meals					
-- Lactose Free Cooking Ingredients and Meals					
-- Meat Free Cooking Ingredients and Meals					
-- No Allergens Cooking Ingredients and Meals					
-- Plant-based Cooking Ingredients and Meals					
-- Vegan Cooking Ingredients and Meals					
-- Vegetarian Cooking Ingredients and Meals					
-- Weight Management					

- Cooking Ingredients and Meals
- Good Source of Antioxidants Cooking Ingredients and Meals
- Good Source of Minerals Cooking Ingredients and Meals
- Good Source of Omega 3s Cooking Ingredients and Meals
- Good Source of Vitamins Cooking Ingredients and Meals
- High Fibre Cooking Ingredients and Meals
- High Protein Cooking Ingredients and Meals
- Probiotic Cooking Ingredients and Meals
- Superfruit Cooking Ingredients and Meals
- Bone and Joint Health Cooking Ingredients and Meals
- Brain Health and Memory Cooking Ingredients and Meals
- Cardiovascular Health Cooking Ingredients and Meals
- Digestive Health Cooking Ingredients and Meals
- Energy Boosting Cooking Ingredients and Meals
- Immune Support Cooking Ingredients and Meals
- Skin Health Cooking Ingredients and Meals
- Natural Cooking Ingredients and Meals
- Organic Cooking Ingredients and Meals



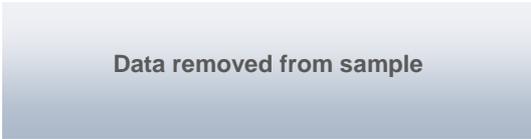
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2023

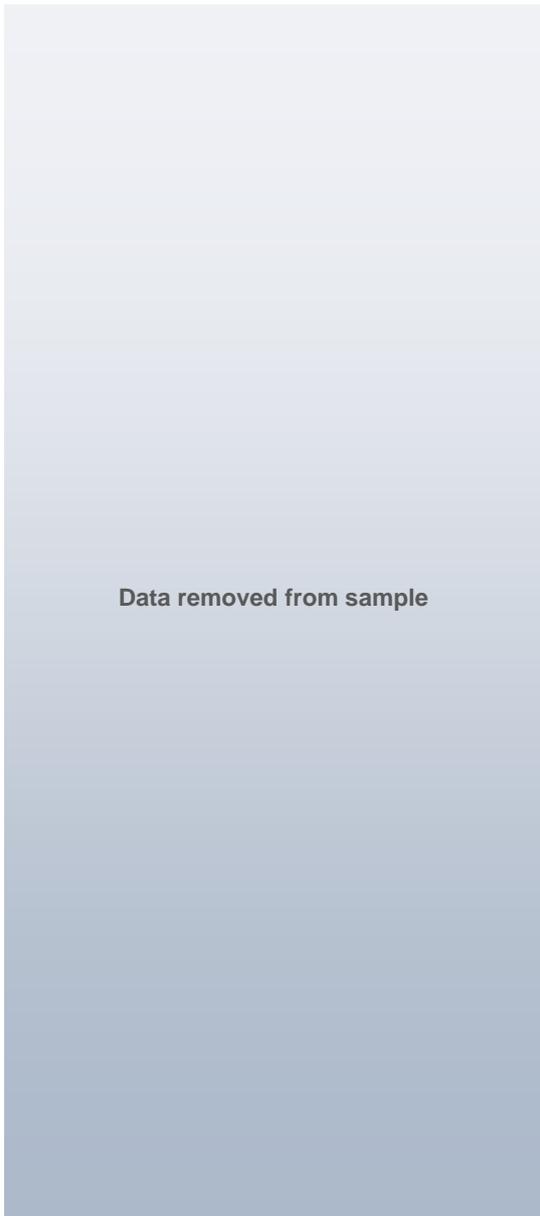
% current value growth

2022/23 2019-23 CAGR 2019/23 Total

- Low Fat Cooking Ingredients and Meals
- Low Salt Cooking Ingredients and Meals
- Low Sugar Cooking Ingredients and Meals
- No Added Sugar Cooking Ingredients and Meals



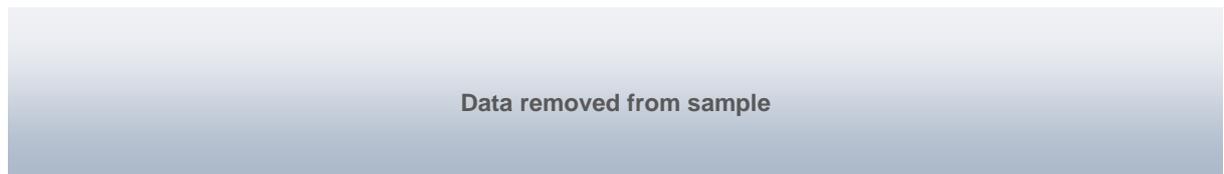
- No Caffeine Cooking Ingredients and Meals
- No Fat Cooking Ingredients and Meals
- No Salt Cooking Ingredients and Meals
- No Sugar Cooking Ingredients and Meals
- Dairy Free Cooking Ingredients and Meals
- Gluten Free Cooking Ingredients and Meals
- Hypoallergenic Cooking Ingredients and Meals
- Keto Cooking Ingredients and Meals
- Lactose Free Cooking Ingredients and Meals
- Meat Free Cooking Ingredients and Meals
- No Allergens Cooking Ingredients and Meals
- Plant-based Cooking Ingredients and Meals
- Vegan Cooking Ingredients and Meals
- Vegetarian Cooking Ingredients and Meals
- Weight Management Cooking Ingredients and Meals
- Good Source of Antioxidants Cooking Ingredients and Meals
- Good Source of Minerals Cooking Ingredients and Meals
- Good Source of Omega 3s Cooking Ingredients and Meals
- Good Source of Vitamins Cooking Ingredients and Meals
- High Fibre Cooking Ingredients and Meals
- High Protein Cooking Ingredients and Meals
- Probiotic Cooking Ingredients and Meals
- Superfruit Cooking Ingredients and Meals
- Bone and Joint Health Cooking Ingredients and Meals
- Brain Health and Memory Cooking Ingredients and Meals
- Cardiovascular Health Cooking Ingredients and Meals
- Digestive Health Cooking Ingredients and Meals
- Energy Boosting Cooking Ingredients and Meals
- Immune Support Cooking Ingredients and Meals
- Skin Health Cooking Ingredients and Meals
- Natural Cooking Ingredients and Meals
- Organic Cooking Ingredients and Meals



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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Data removed from sample					
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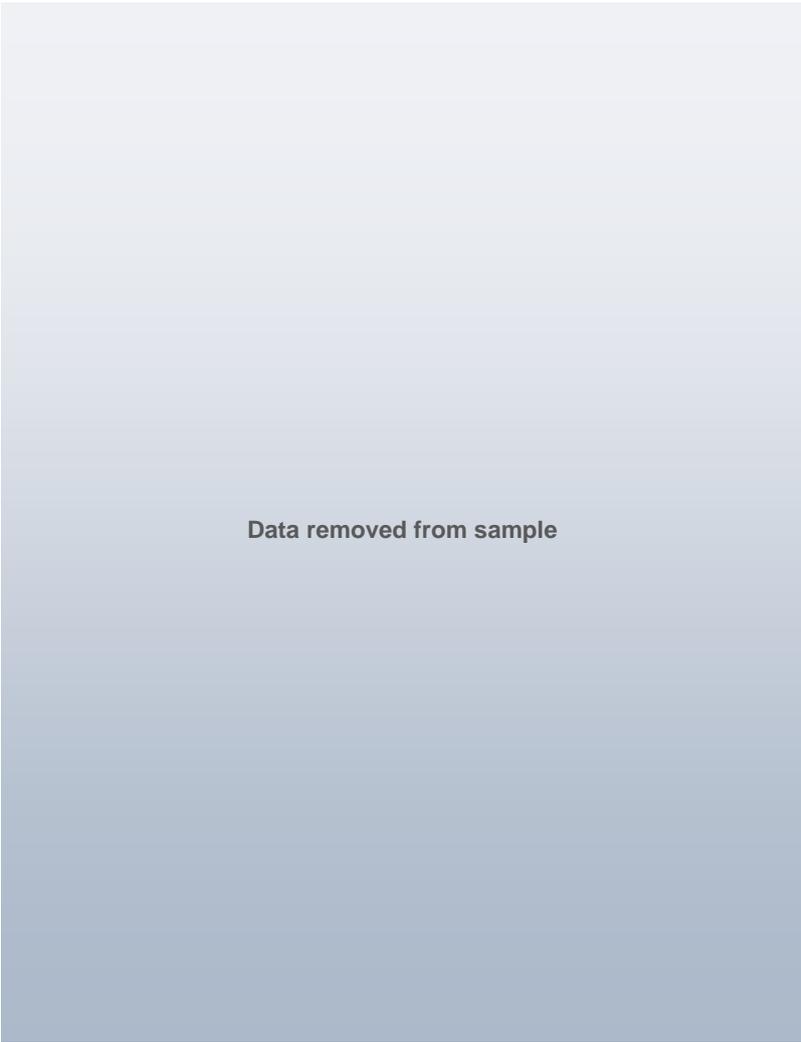
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 42 Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-- Low Fat Cooking Ingredients and Meals	Data removed from sample					
-- Low Salt Cooking Ingredients and Meals						
-- Low Sugar Cooking Ingredients and Meals						
-- No Added Sugar Cooking Ingredients and Meals						
-- No Caffeine Cooking Ingredients and Meals						
-- No Fat Cooking Ingredients and Meals						
-- No Salt Cooking Ingredients and Meals						
-- No Sugar Cooking Ingredients and Meals						
-- Dairy Free Cooking Ingredients and Meals						
-- Gluten Free Cooking Ingredients and Meals						
-- Hypoallergenic Cooking Ingredients and Meals						
-- Keto Cooking Ingredients and Meals						
-- Lactose Free Cooking Ingredients and Meals						
-- Meat Free Cooking Ingredients and Meals						
-- No Allergens Cooking Ingredients and Meals						
-- Plant-based Cooking Ingredients and Meals						
-- Vegan Cooking Ingredients and Meals						
-- Vegetarian Cooking Ingredients and Meals						
-- Weight Management Cooking Ingredients and Meals						
-- Good Source of Antioxidants Cooking Ingredients and Meals						
-- Good Source of Minerals Cooking Ingredients and Meals						

- Good Source of Omega 3s Cooking Ingredients and Meals
- Good Source of Vitamins Cooking Ingredients and Meals
- High Fibre Cooking Ingredients and Meals
- High Protein Cooking Ingredients and Meals
- Probiotic Cooking Ingredients and Meals
- Superfruit Cooking Ingredients and Meals
- Bone and Joint Health Cooking Ingredients and Meals
- Brain Health and Memory Cooking Ingredients and Meals
- Cardiovascular Health Cooking Ingredients and Meals
- Digestive Health Cooking Ingredients and Meals
- Energy Boosting Cooking Ingredients and Meals
- Immune Support Cooking Ingredients and Meals
- Skin Health Cooking Ingredients and Meals
- Natural Cooking Ingredients and Meals
- Organic Cooking Ingredients and Meals



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Low Fat Cooking Ingredients and Meals
- Low Salt Cooking Ingredients and Meals
- Low Sugar Cooking Ingredients and Meals
- No Added Sugar Cooking Ingredients and Meals
- No Caffeine Cooking Ingredients and Meals
- No Fat Cooking Ingredients and Meals
- No Salt Cooking Ingredients and Meals
- No Sugar Cooking Ingredients and Meals
- Dairy Free Cooking Ingredients and Meals
- Gluten Free Cooking Ingredients and Meals
- Hypoallergenic Cooking Ingredients and Meals



Meals

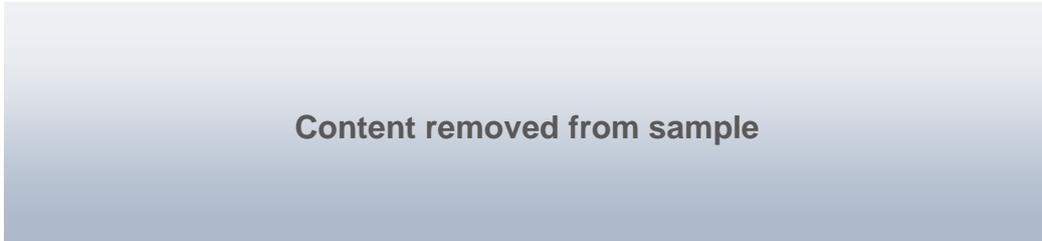
- Keto Cooking Ingredients and Meals
- Lactose Free Cooking Ingredients and Meals
- Meat Free Cooking Ingredients and Meals
- No Allergens Cooking Ingredients and Meals
- Plant-based Cooking Ingredients and Meals
- Vegan Cooking Ingredients and Meals
- Vegetarian Cooking Ingredients and Meals
- Weight Management Cooking Ingredients and Meals
- Good Source of Antioxidants Cooking Ingredients and Meals
- Good Source of Minerals Cooking Ingredients and Meals
- Good Source of Omega 3s Cooking Ingredients and Meals
- Good Source of Vitamins Cooking Ingredients and Meals
- High Fibre Cooking Ingredients and Meals
- High Protein Cooking Ingredients and Meals
- Probiotic Cooking Ingredients and Meals
- Superfruit Cooking Ingredients and Meals
- Bone and Joint Health Cooking Ingredients and Meals
- Brain Health and Memory Cooking Ingredients and Meals
- Cardiovascular Health Cooking Ingredients and Meals
- Digestive Health Cooking Ingredients and Meals
- Energy Boosting Cooking Ingredients and Meals
- Immune Support Cooking Ingredients and Meals
- Skin Health Cooking Ingredients and Meals
- Natural Cooking Ingredients and Meals
- Organic Cooking Ingredients and Meals

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

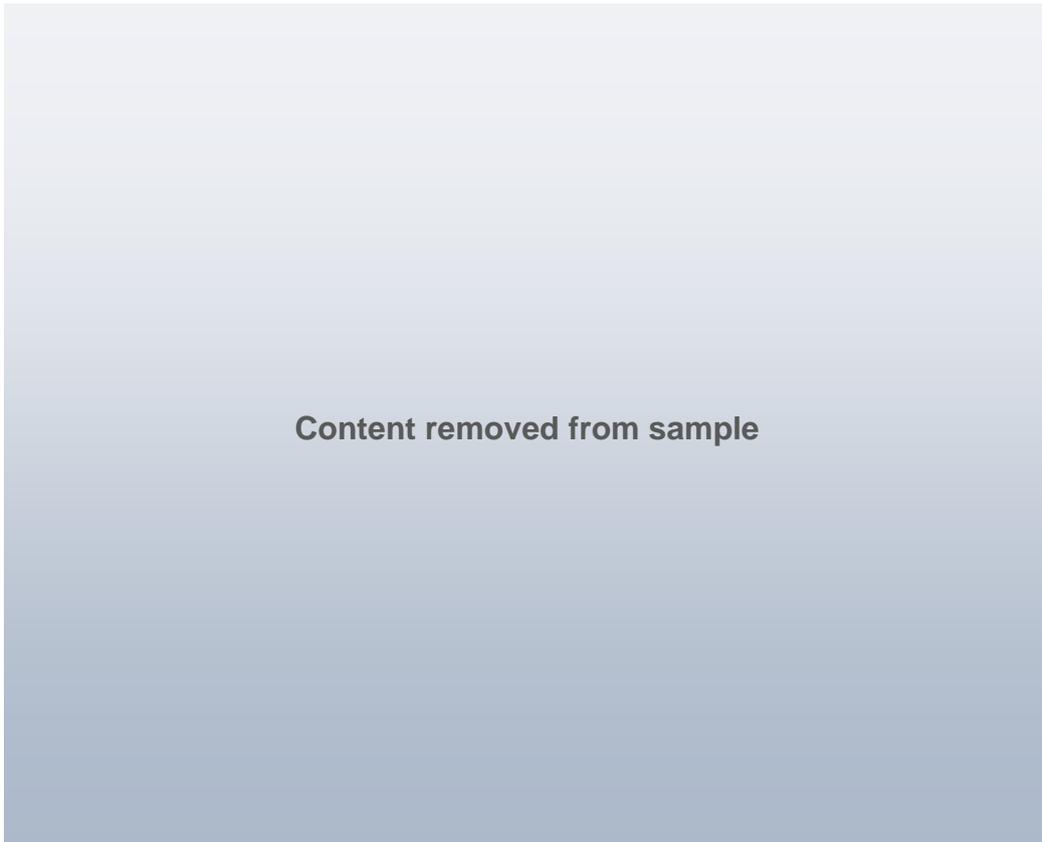
HW STAPLE FOODS IN SOUTH AFRICA - CATEGORY ANALYSIS

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

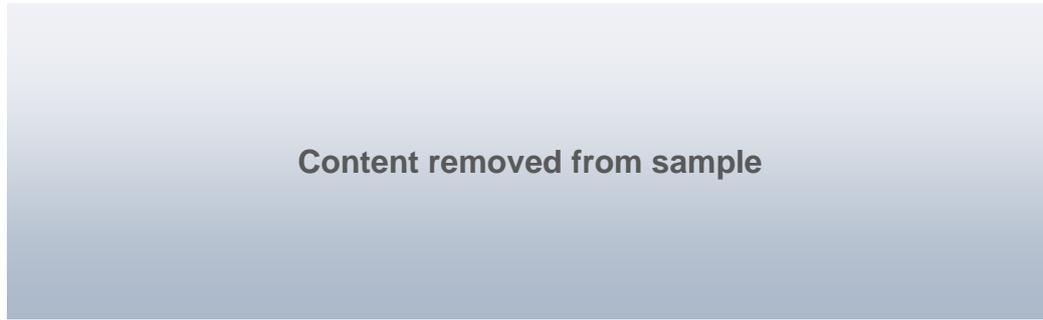
Proposed rigorous food labelling to potentially disrupt breakfast cereals

Content removed from sample

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

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Niche of digestive health set to gain momentum

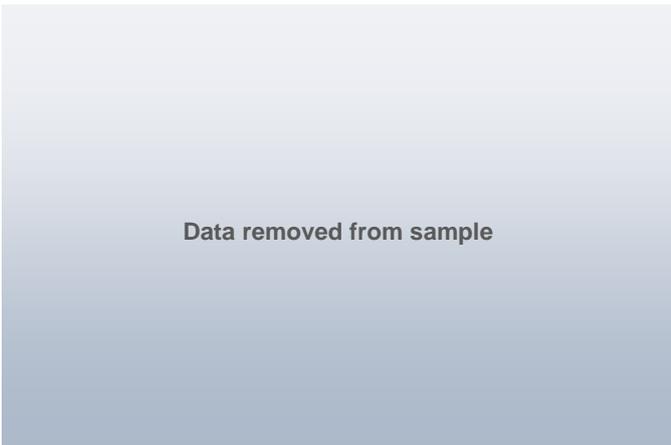


CATEGORY DATA

Table 44 Sales of Staple Foods by Health and Wellness Type: Value 2019-2023

ZAR million	2019	2020	2021	2022	2023
-- Low Fat Staple Foods	Data removed from sample				
-- Low Salt Staple Foods					
-- Low Sugar Staple Foods					
-- No Added Sugar Staple Foods					
-- No Caffeine Staple Foods					
-- No Fat Staple Foods					
-- No Salt Staple Foods					
-- No Sugar Staple Foods					
-- Dairy Free Staple Foods					
-- Gluten Free Staple Foods					
-- Hypoallergenic Staple Foods					
-- Keto Staple Foods					
-- Lactose Free Staple Foods					
-- Meat Free Staple Foods					
-- No Allergens Staple Foods					
-- Plant-based Staple Foods					
-- Vegan Staple Foods					
-- Vegetarian Staple Foods					
-- Weight Management Staple Foods					
-- Good Source of Antioxidants Staple Foods					
-- Good Source of Minerals Staple Foods					
-- Good Source of Omega 3s Staple Foods					
-- Good Source of Vitamins Staple Foods					
-- High Fibre Staple Foods					
-- High Protein Staple Foods					
-- Probiotic Staple Foods					
-- Superfruit Staple Foods					
-- Bone and Joint Health					

- Staple Foods
- Brain Health and Memory Staple Foods
- Cardiovascular Health Staple Foods
- Digestive Health Staple Foods
- Energy Boosting Staple Foods
- Immune Support Staple Foods
- Skin Health Staple Foods
- Vision Health Staple Foods
- Natural Staple Foods
- Organic Staple Foods



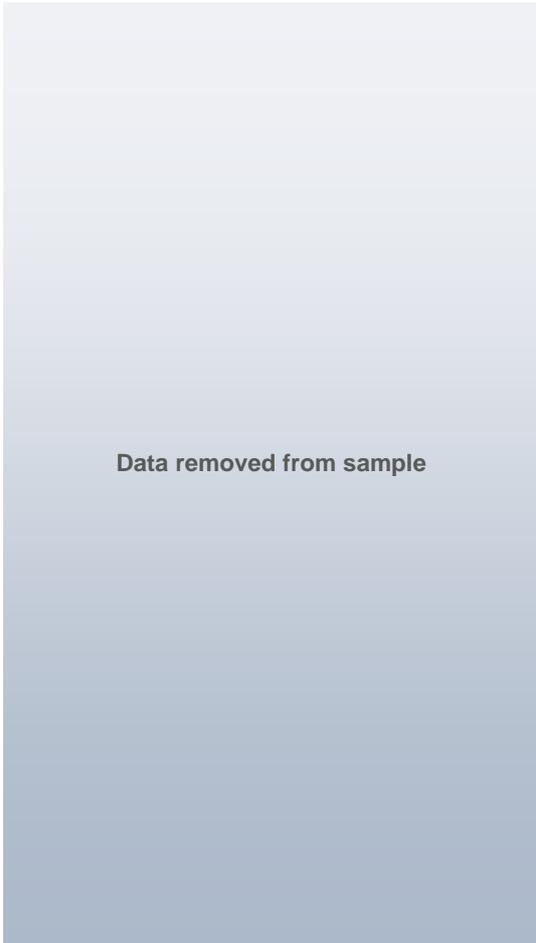
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2023

% current value growth

2022/23 2019-23 CAGR 2019/23 Total

- Low Fat Staple Foods
- Low Salt Staple Foods
- Low Sugar Staple Foods
- No Added Sugar Staple Foods
- No Caffeine Staple Foods
- No Fat Staple Foods
- No Salt Staple Foods
- No Sugar Staple Foods
- Dairy Free Staple Foods
- Gluten Free Staple Foods
- Hypoallergenic Staple Foods
- Keto Staple Foods
- Lactose Free Staple Foods
- Meat Free Staple Foods
- No Allergens Staple Foods
- Plant-based Staple Foods
- Vegan Staple Foods
- Vegetarian Staple Foods
- Weight Management Staple Foods
- Good Source of Antioxidants Staple Foods
- Good Source of Minerals Staple Foods
- Good Source of Omega 3s Staple Foods
- Good Source of Vitamins Staple Foods
- High Fibre Staple Foods
- High Protein Staple Foods
- Probiotic Staple Foods
- Superfruit Staple Foods
- Bone and Joint Health Staple Foods
- Brain Health and Memory Staple Foods
- Cardiovascular Health Staple Foods
- Digestive Health Staple Foods
- Energy Boosting Staple Foods
- Immune Support Staple Foods
- Skin Health Staple Foods



- Vision Health Staple Foods
- Natural Staple Foods
- Organic Staple Foods

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 47 Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 48 Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 49 Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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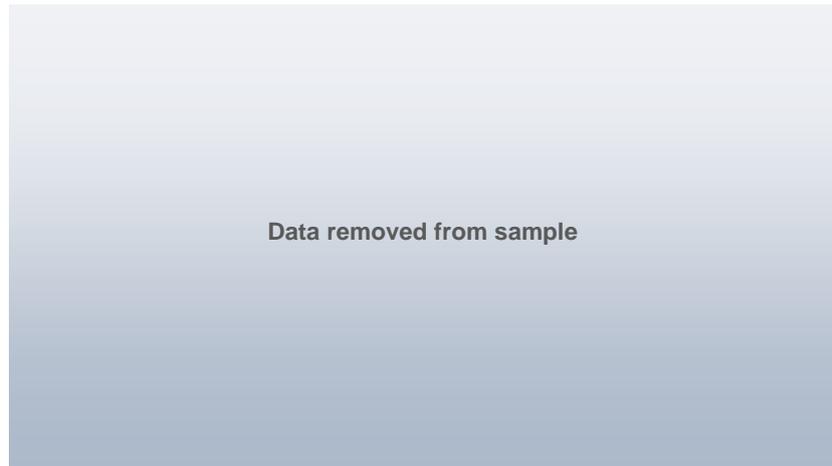
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 50 Forecast Sales of Staple Foods by Health and Wellness Type: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
-- Low Fat Staple Foods	Data removed from sample					
-- Low Salt Staple Foods						
-- Low Sugar Staple Foods						
-- No Added Sugar Staple Foods						
-- No Caffeine Staple Foods						
-- No Fat Staple Foods						
-- No Salt Staple Foods						
-- No Sugar Staple Foods						
-- Dairy Free Staple Foods						
-- Gluten Free Staple Foods						
-- Hypoallergenic Staple Foods						
-- Keto Staple Foods						
-- Lactose Free Staple Foods						
-- Meat Free Staple Foods						
-- No Allergens Staple Foods						
-- Plant-based Staple Foods						
-- Vegan Staple Foods						
-- Vegetarian Staple Foods						
-- Weight Management Staple Foods						
-- Good Source of Antioxidants Staple Foods						
-- Good Source of Minerals Staple Foods						
-- Good Source of Omega 3s Staple Foods						
-- Good Source of Vitamins Staple Foods						
-- High Fibre Staple Foods						
-- High Protein Staple Foods						
-- Probiotic Staple Foods						
-- Superfruit Staple Foods						
-- Bone and Joint						

- Health Staple Foods
- Brain Health and Memory Staple Foods
- Cardiovascular Health Staple Foods
- Digestive Health Staple Foods
- Energy Boosting Staple Foods
- Immune Support Staple Foods
- Skin Health Staple Foods
- Vision Health Staple Foods
- Natural Staple Foods
- Organic Staple Foods



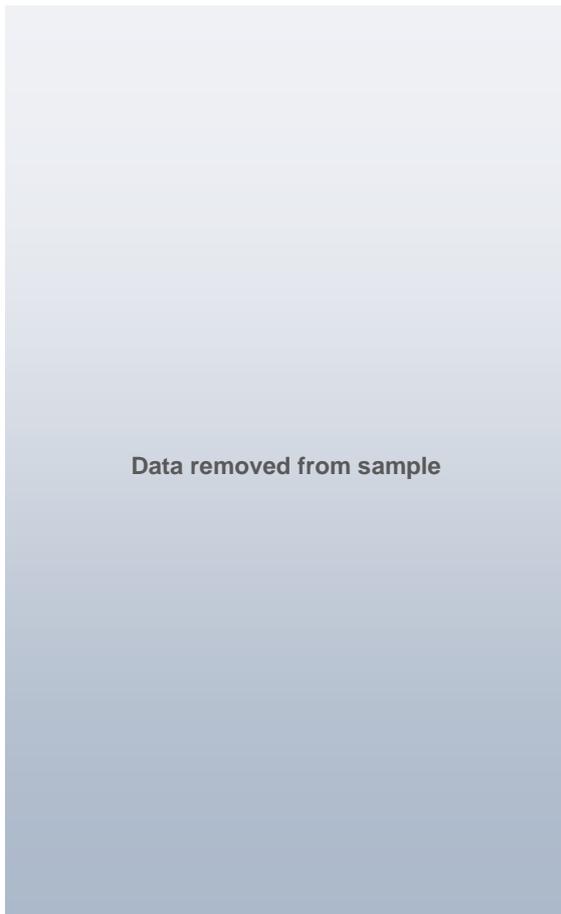
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Low Fat Staple Foods
- Low Salt Staple Foods
- Low Sugar Staple Foods
- No Added Sugar Staple Foods
- No Caffeine Staple Foods
- No Fat Staple Foods
- No Salt Staple Foods
- No Sugar Staple Foods
- Dairy Free Staple Foods
- Gluten Free Staple Foods
- Hypoallergenic Staple Foods
- Keto Staple Foods
- Lactose Free Staple Foods
- Meat Free Staple Foods
- No Allergens Staple Foods
- Plant-based Staple Foods
- Vegan Staple Foods
- Vegetarian Staple Foods
- Weight Management Staple Foods
- Good Source of Antioxidants Staple Foods
- Good Source of Minerals Staple Foods
- Good Source of Omega 3s Staple Foods
- Good Source of Vitamins Staple Foods
- High Fibre Staple Foods
- High Protein Staple Foods
- Probiotic Staple Foods
- Superfruit Staple Foods
- Bone and Joint Health Staple Foods
- Brain Health and Memory Staple Foods
- Cardiovascular Health Staple Foods
- Digestive Health Staple Foods
- Energy Boosting Staple Foods
- Immune Support Staple Foods



- Skin Health Staple Foods
- Vision Health Staple Foods
- Natural Staple Foods
- Organic Staple Foods

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources