

# Health and Wellness in Italy

November 2023

Table of Contents

## Health and Wellness in Italy

## EXECUTIVE SUMMARY

Overview

DISCLAIMER

HW Hot Drinks in Italy

## KEY DATA FINDINGS

## 2022 DEVELOPMENTS

Consumers willing to pay more for clearly defined health benefits but economic pressures limit stronger gains Natural fresh coffee remains the key sales driver in 2022 Health conscious consumers look to reduce their intake of sugar, fat, salt and caffeine

## PROSPECTS AND OPPORTUNITIES

Italians expected to embrace natural, healthy and organic hot drinks options over the forecast period Natural claims tap into a growing desire to follow a clean and healthy lifestyle Digestive health expected to offer growth opportunities

## CATEGORY DATA

 Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2022

- Table 2 Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2022
- Table 3 Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 4 Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 5 Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 6 Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 7 Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 8 Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027
- Table 9 Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Soft Drinks in Italy

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Consumers focus on reducing their sugar intake in 2022 while energy boosting properties prove fruitful Natural soft drinks retain their appeal among health conscious consumers in 2022 Dairy free claims boost sales of Red Bull

## PROSPECTS AND OPPORTUNITIES

Polarised performance expected from health and wellness soft drinks over the forecast period Energy boosting the most promising health claim in soft drinks High fibre juice to grow as consumers look to improve their health

## CATEGORY DATA

- Table 10 Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022
- Table 11 Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022
- Table 12 Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 13 Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 14 Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 15 Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 16 Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027
- Table 17 Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

## HW Snacks in Italy

## **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

High protein snack bars back in favour as pandemic fears subside Gluten free leads health and wellness snacks in 2022 Caffeine comes under the microscope as consumers look to lead longer, healthier lives

## PROSPECTS AND OPPORTUNITIES

Demand for plant-based, vegan, and dairy free ice cream set to rise Consumers likely to show increasing awareness of the impact of their purchasing decisions on their health and the environment Digestive health coming into greater focus

#### CATEGORY DATA

Table 18 - Sales of Snacks by Health and Wellness Type: Value 2019-2022Table 19 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022Table 20 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022Table 21 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022Table 22 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022Table 23 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022Table 24 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027Table 25 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

## HW Dairy Products and Alternatives in Italy

## KEY DATA FINDINGS

## 2022 DEVELOPMENTS

Vegan dairy products and alternatives on the rise as more consumers pursue plant-based diets Lactose free leads health and wellness dairy products and alternatives in 2022 High fibre claim sees rising demand and sales

#### PROSPECTS AND OPPORTUNITIES

Immune support claims likely to become more prominent in milk formula over the forecast period Consumers becoming more selective about what they put into their diet Promising outlook for digestive health, backed by Italy's rapidly ageing population

## CATEGORY DATA

Table 26 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022

Table 27 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022

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

 2022

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

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

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

 Value 2019-2

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

 2019-2022

Table 33 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

Table 34 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

## HW Cooking Ingredients and Meals in Italy

## **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

Organic products finding favour as Italy approves new organic law Increasingly health conscious consumers helping to drive sales in 2022 with focus on gluten free claims Consumers look to cut salt out of their diet as health concerns grow

## PROSPECTS AND OPPORTUNITIES

Italians taking the sugar out of their spreads as obesity rates rise

No allergens cooking ingredients and meals receiving growing interest but Nutella remains under the microscope Italy's ageing population likely to boost sales of immune support cooking ingredients and meals

#### CATEGORY DATA

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

Table 36 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2022

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

Table 38 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 39 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

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

Table 43 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2022-2027

## HW Staple Foods in Italy

## **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Italians go in search of healthy indulgence Gluten free claims find favour in 2022 as consumers pursue healthier diets Ageing Italian population helps stimulate demand for brain health and memory staple foods

#### PROSPECTS AND OPPORTUNITIES

Pasta lovers expected to turn to healthier options

Italians likely to become more sensitive about what goes into the food they eat with a strong focus on gluten and fibre Keto staple foods set benefit from growing obesity concerns

#### CATEGORY DATA

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

- Table 45 Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2022
- Table 46 Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022
- Table 47 Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022
- Table 48 Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022
- Table 49 Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022
- Table 50 Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2022
- Table 51 Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027
- Table 52 Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2022-2027

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/health-and-wellness-in-italy/report.