Health and Wellness in Sweden

February 2022

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KEY DATA FINDINGS

2021 DEVELOPMENTS

BFY packaged food retains popularity amongst consumers wanting healthier variants of their favourite food products

Category continues to face competition from zero-fat or zero-sugar variants

Indulgence categories remain a niche

PROSPECTS AND OPPORTUNITIES

Demand for natural options set to hamper sales in BFY packaged food

With packaged food becoming healthier through government initiatives, there will be little need for consumers to purchase BFY alternatives

BFY dairy to have strongest sales despite driving growth in smaller categories

CATEGORY DATA

Fortified/Functional Beverages in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

FF hot drinks is a niche with sales concentrated around FF fruit/herbal tea

FF soft drinks growth is driven by FF fruit/vegetable juice and FF energy drinks, with innovation strong in both categories

Fastest growth is seen in e-commerce thanks to its convenience and safety

PROSPECTS AND OPPORTUNITIES

FF fruit/herbal tea to grow with packaging designs becoming more important

Strong prospects for FF soft drinks driven by popularity of FF energy drinks

Impulse purchases set to resume as the threat of COVID-19 declines

CATEGORY DATA

Fortified/Functional Packaged Food in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

Protein and vitamin enhanced products drive category growth

Vague labelling impedes progress of category growth

Exercise trend continues to boost popularity of high protein products

PROSPECTS AND OPPORTUNITIES

Strict EU and national regulations limit potential for growth

Lack of active FF marketing to become the norm

Little innovation expected due to monopolisation of several categories

CATEGORY DATA

Free From in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

Loyal consumer base ensures strong retail growth for free from category

Free from meat continues to see dynamism with constant innovations boosting awareness

Strong trend in free from dairy is partially based on strong local options

PROSPECTS AND OPPORTUNITIES

Category to remain dynamic as it increasingly appeals to more consumers

Free from meat and free from dairy expected to remain main trends

Private label expected to continue driving innovation, particularly in free from meat

CATEGORY DATA

Naturally Healthy Beverages in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

Strong competition characterises NH tea

NH soft drinks driven by rising sales in NH bottled water and NH superfruit juice

Private label growth as consumers seek cheaper options

PROSPECTS AND OPPORTUNITIES

Competition from BFY and FF categories set to hamper growth in NH beverages

NH tea set to continue being a highly competitive category; RTD tea prospects likely to stall

Demand for convenience expected to lead to greater e-commerce sales

CATEGORY DATA

Naturally Healthy Packaged Food in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

As consumers strive to eat healthier, NH packaged food sales rise

Premium and locally sourced products are increasingly sought after in Sweden

Increasing overlap between HW categories as products become more advanced

PROSPECTS AND OPPORTUNITIES

Popularity of high-fibre products and olive oil means that NH food is relatively saturated

Bigger players expected to follow smaller operators into interesting new niches

Healthy snacks set for long-term success as on-the-go consumption occasions rise

CATEGORY DATA

Organic Beverages in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

Economic impact of pandemic hampers growth of organic beverages

Löfbergs Lila narrowly maintains lead over Jacobs Douwe Egberts in organic coffee thanks to local focus

Private label products rebound from declining sales as consumers seek cheaper options

PROSPECTS AND OPPORTUNITIES

Growth to be hampered by competition from other categories and limited availability of organic ingredients

Consumers to show preference for local and organic-only brands in organic hot drinks

Large players expected to withdraw organic brand extensions as smaller organic-first brands gain trust

CATEGORY DATA

Organic Packaged Food in Sweden

KEY DATA FINDINGS

2021 DEVELOPMENTS

Category sales limited by debate over healthiness and greenness of organic produce
Increased investment from private label is aiding overall category growth
Organic baby food attracts big players as consumers demand high-quality for their children

PROSPECTS AND OPPORTUNITIES

Consumers and retailers to show greater interest in other HW categories
Swedish KRAV label provides potential for brands to stand out
Environmental debate around organic ‘greenness’ to negatively impact sales

CATEGORY DATA