

# Health and Wellness in Sweden

February 2022

Table of Contents

## Health and Wellness in Sweden

### EXECUTIVE SUMMARY

Health and wellness in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

What next for health and wellness?

### MARKET DATA

Table 1 - Sales of Health and Wellness by Type: Value 2016-2021

Table 2 - Sales of Health and Wellness by Type: % Value Growth 2016-2021

Table 3 - Sales of Health and Wellness by Category: Value 2016-2021

Table 4 - Sales of Health and Wellness by Category: % Value Growth 2016-2021

Table 5 - Sales of Health and Wellness by Prime Positioning: Value 2016-2021

Table 6 - Sales of Health and Wellness by Prime Positioning: % Value Growth 2016-2021

Table 7 - NBO Company Shares of Health and Wellness: % Value 2017-2021

Table 8 - LBN Brand Shares of Health and Wellness: % Value 2018-2021

Table 9 - Distribution of Health and Wellness by Format: % Value 2016-2021

Table 10 - Distribution of Health and Wellness by Format and Category: % Value 2021

Table 11 - Forecast Sales of Health and Wellness by Type: Value 2021-2026

Table 12 - Forecast Sales of Health and Wellness by Type: % Value Growth 2021-2026

Table 13 - Forecast Sales of Health and Wellness by Category: Value 2021-2026

Table 14 - Forecast Sales of Health and Wellness by Category: % Value Growth 2021-2026

Table 15 - Forecast Sales of Health and Wellness by Prime Positioning: Value 2021-2026

Table 16 - Forecast Sales of Health and Wellness by Prime Positioning: % Value Growth 2021-2026

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Better For You Beverages in Sweden

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Culture of drinking caffeinated coffee means there is little need for brands to introduce BFY reduced caffeine options

Health trends drive sales for reduced-sugar carbonates

Grocery retailers remain top channel despite growth of e-commerce

#### PROSPECTS AND OPPORTUNITIES

Reduced sugar categories to continue growing as consumers substitute carbonates for healthier options

Limited rise expected for reduced fat and reduced caffeine BFY beverages

Private label to return to limited category presence

### CATEGORY DATA

Table 17 - Sales of BFY Beverages by Category: Value 2016-2021

Table 18 - Sales of BFY Beverages by Category: % Value Growth 2016-2021

Table 19 - NBO Company Shares of BFY Beverages: % Value 2017-2021

Table 20 - LBN Brand Shares of BFY Beverages: % Value 2018-2021

Table 21 - Distribution of BFY Beverages by Format: % Value 2016-2021

Table 22 - Forecast Sales of BFY Beverages by Category: Value 2021-2026

Table 23 - Forecast Sales of BFY Beverages by Category: % Value Growth 2021-2026

## Better For You Packaged Food in Sweden

### 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

Table 24 - Sales of BFY Packaged Food by Category: Value 2016-2021

Table 25 - Sales of BFY Packaged Food by Category: % Value Growth 2016-2021

Table 26 - NBO Company Shares of BFY Packaged Food: % Value 2017-2021

Table 27 - LBN Brand Shares of BFY Packaged Food: % Value 2018-2021

Table 28 - Distribution of BFY Packaged Food by Format: % Value 2016-2021

Table 29 - Forecast Sales of BFY Packaged Food by Category: Value 2021-2026

Table 30 - Forecast Sales of BFY Packaged Food by Category: % Value Growth 2021-2026

## 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

Table 31 - Sales of Fortified/Functional Beverages by Category: Value 2016-2021

Table 32 - Sales of Fortified/Functional Beverages by Category: % Value Growth 2016-2021

Table 33 - Key Functional Ingredients in Fortified/Functional Bottled Water: % Value 2016-2021

Table 34 - Key Functional Ingredients in Fortified/Functional Non-Cola Carbonates: % Value 2016-2021

Table 35 - Key Functional Ingredients in Fortified/Functional 100% Juice: % Value 2016-2021

Table 36 - Key Functional Ingredients in Fortified/Functional Juice Drinks (up to 24% juice): % Value 2016-2021

Table 37 - Key Functional Ingredients in Fortified/Functional Nectars (25-99% juice): % Value 2016-2021

Table 38 - Key Functional Ingredients in Fortified/Functional RTD Tea: % Value 2016-2021

Table 39 - NBO Company Shares of Fortified/Functional Beverages: % Value 2017-2021

Table 40 - LBN Brand Shares of Fortified/Functional Beverages: % Value 2018-2021

Table 41 - Distribution of Fortified/Functional Beverages by Format: % Value 2016-2021

Table 42 - Forecast Sales of Fortified/Functional Beverages by Category: Value 2021-2026

Table 43 - Forecast Sales of Fortified/Functional Beverages by Category: % Value Growth 2021-2026

## 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

Table 44 - Sales of Fortified/Functional Packaged Food by Category: Value 2016-2021  
Table 45 - Sales of Fortified/Functional Packaged Food by Category: % Value Growth 2016-2021  
Table 46 - Key Functional Ingredients in Fortified/Functional Breakfast Cereals: % Value 2016-2021  
Table 47 - Key Functional Ingredients in Fortified/Functional Bread: % Value 2016-2021  
Table 48 - Key Functional Ingredients in Fortified/Functional Sugar Confectionery: % Value 2016-2021  
Table 49 - Sales of Fortified/Functional Yoghurt by Standard Fat vs Reduced Fat: % Value 2016-2021  
Table 50 - NBO Company Shares of Fortified/Functional Packaged Food: % Value 2017-2021  
Table 51 - LBN Brand Shares of Fortified/Functional Packaged Food: % Value 2018-2021  
Table 52 - LBN Brand Shares of Fortified/Functional Bread: % Value 2018-2021  
Table 53 - Distribution of Fortified/Functional Packaged Food by Format: % Value 2016-2021  
Table 54 - Forecast Sales of Fortified/Functional Packaged Food by Category: Value 2021-2026  
Table 55 - Forecast Sales of Fortified/Functional Packaged Food by Category: % Value Growth 2021-2026

## 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

Table 56 - Sales of Free From by Category: Value 2016-2021  
Table 57 - Sales of Free From by Category: % Value Growth 2016-2021  
Table 58 - NBO Company Shares of Free From: % Value 2017-2021  
Table 59 - LBN Brand Shares of Free From: % Value 2018-2021  
Table 60 - Distribution of Free From by Format: % Value 2016-2021  
Table 61 - Forecast Sales of Free From by Category: Value 2021-2026  
Table 62 - Forecast Sales of Free From by Category: % Value Growth 2021-2026

## 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

Table 63 - Sales of NH Beverages by Category: Value 2016-2021

Table 64 - Sales of NH Beverages by Category: % Value Growth 2016-2021

Table 65 - NBO Company Shares of NH Beverages: % Value 2017-2021

Table 66 - LBN Brand Shares of NH Beverages: % Value 2018-2021

Table 67 - Distribution of NH Beverages by Format: % Value 2016-2021

Table 68 - Forecast Sales of NH Beverages by Category: Value 2021-2026

Table 69 - Forecast Sales of NH Beverages by Category: % Value Growth 2021-2026

## 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

Table 70 - Sales of NH Packaged Food by Category: Value 2016-2021

Table 71 - Sales of NH Packaged Food by Category: % Value Growth 2016-2021

Table 72 - NBO Company Shares of NH Packaged Food: % Value 2017-2021

Table 73 - LBN Brand Shares of NH Packaged Food: % Value 2018-2021

Table 74 - Distribution of NH Packaged Food by Format: % Value 2016-2021

Table 75 - Forecast Sales of NH Packaged Food by Category: Value 2021-2026

Table 76 - Forecast Sales of NH Packaged Food by Category: % Value Growth 2021-2026

## 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

Table 77 - Sales of Organic Beverages by Category: Value 2016-2021

Table 78 - Sales of Organic Beverages by Category: % Value Growth 2016-2021

Table 79 - NBO Company Shares of Organic Beverages: % Value 2017-2021

Table 80 - LBN Brand Shares of Organic Beverages: % Value 2018-2021

Table 81 - Distribution of Organic Beverages by Format: % Value 2016-2021

Table 82 - Forecast Sales of Organic Beverages by Category: Value 2021-2026

Table 83 - Forecast Sales of Organic Beverages by Category: % Value Growth 2021-2026

## 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

Table 84 - Sales of Organic Packaged Food by Category: Value 2016-2021

Table 85 - Sales of Organic Packaged Food by Category: % Value Growth 2016-2021

Table 86 - NBO Company Shares of Organic Packaged Food: % Value 2017-2021

Table 87 - LBN Brand Shares of Organic Packaged Food: % Value 2018-2021

Table 88 - Distribution of Organic Packaged Food by Format: % Value 2016-2021

Table 89 - Forecast Sales of Organic Packaged Food by Category: Value 2021-2026

Table 90 - Forecast Sales of Organic Packaged Food by Category: % Value Growth 2021-2026

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