

Consumer Health in Italy

Market Direction | 2022-09-19 | 117 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2200.00
- Multiple User License (1 Site) €4400.00
- Multiple User License (Global) €6600.00

Report description:

Consumer health is expected to record steady single-digit growth in current value terms in 2022, continuing the positive trend recorded in 2021. Most categories are set to see a full recovery from the negative impact of the COVID-19 crisis and sales should return to pre-pandemic levels. Improvements in 2022 are mostly linked to the easing of restrictions and the revival of more normal lifestyles, with Italians feeling less concerned about COVID-19. This is thanks to the positive impact of the va...

Euromonitor International's Consumer Health in Italy report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2017-2021, allowing you to identify the sectors driving growth. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Allergy Care, Herbal/Traditional Products, OTC, Paediatric Consumer Health, Sports Nutrition, Vitamins and Dietary Supplements, Weight Management and Wellbeing.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Consumer Health market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Consumer Health in Italy
Euromonitor International
September 2022

List Of Contents And Tables

CONSUMER HEALTH IN ITALY

EXECUTIVE SUMMARY

Consumer health in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for consumer health?

MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2017-2022
Table 2 Life Expectancy at Birth 2017-2022

MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2017-2022
Table 4 Sales of Consumer Health by Category: % Value Growth 2017-2022
Table 5 NBO Company Shares of Consumer Health: % Value 2018-2022
Table 6 LBN Brand Shares of Consumer Health: % Value 2019-2022
Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2017-2022
Table 8 Distribution of Consumer Health by Format: % Value 2017-2022
Table 9 Distribution of Consumer Health by Format and Category: % Value 2022
Table 10 □Forecast Sales of Consumer Health by Category: Value 2022-2027
Table 11 □Forecast Sales of Consumer Health by Category: % Value Growth 2022-2027

APPENDIX

OTC registration and classification
Vitamins and dietary supplements registration and classification
Self-medication/self-care and preventive medicine
Switches

DISCLAIMER

DEFINITIONS

SOURCES

Summary 1 Research Sources

ANALGESICS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Analgesics benefit from the higher circulation of cold and flu, as restrictions are lifted
Analgesics sees fewer product launches as a result of the health emergency and rising production costs
Topical analgesics benefits from a return to more active lifestyles

PROSPECTS AND OPPORTUNITIES

Return to more hectic lifestyles should benefit sales
Fast acting and convenience remain the main drivers of growth
Growing self-medication culture should benefit sales

CATEGORY DATA

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 12 Sales of Analgesics by Category: Value 2017-2022

Table 13 Sales of Analgesics by Category: % Value Growth 2017-2022

Table 14 NBO Company Shares of Analgesics: % Value 2018-2022

Table 15 LBN Brand Shares of Analgesics: % Value 2019-2022

Table 16 Forecast Sales of Analgesics by Category: Value 2022-2027

Table 17 Forecast Sales of Analgesics by Category: % Value Growth 2022-2027

COUGH, COLD AND ALLERGY (HAY FEVER) REMEDIES IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cold and flu make their comeback in 2022

Recovery seen in most categories with pharyngeal preparations the big winner

Allergies return and sales rise as masks come off

PROSPECTS AND OPPORTUNITIES

Further recovery expected in the short-term but increased uptake of flu vaccine could undermine sales growth

Herbal/traditional products could threaten sales of standard OTC cough, cold and allergy (hay fever) remedies

Antihistamines/allergy remedies (systemic) set to benefit from rise in allergy sufferers

CATEGORY DATA

Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2017-2022

Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2017-2022

Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2018-2022

Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2022

Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2022-2027

Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2022-2027

DIGESTIVE REMEDIES IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Strong growth expected as restrictions continue to ease

Antacids set to flourish as consumers return to eating out more

Demand of laxatives drops as consumers return to more active lifestyles

PROSPECTS AND OPPORTUNITIES

Digestive remedies to remain dynamic overall

A growing focus on prevention may curb growth

Herbal/traditional digestive remedies set to drive growth

CATEGORY DATA

Table 24 Sales of Digestive Remedies by Category: Value 2017-2022

Table 25 Sales of Digestive Remedies by Category: % Value Growth 2017-2022

Table 26 NBO Company Shares of Digestive Remedies: % Value 2018-2022

Table 27 LBN Brand Shares of Digestive Remedies: % Value 2019-2022

Table 28 Forecast Sales of Digestive Remedies by Category: Value 2022-2027

Table 29 Forecast Sales of Digestive Remedies by Category: % Value Growth 2022-2027

DERMATOLOGICALS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

A return to more active lifestyles boosts growth in 2022

More outdoor activities benefit Topical Germicidals/Antiseptics

Vaginal antifungals continues its recovery

PROSPECTS AND OPPORTUNITIES

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Maturity will likely curb the category's development

Declining birth rates threaten sales of nappy (diaper) rash treatments

Hair loss a growing industry

CATEGORY DATA

Table 30 Sales of Dermatologicals by Category: Value 2017-2022

Table 31 Sales of Dermatologicals by Category: % Value Growth 2017-2022

Table 32 NBO Company Shares of Dermatologicals: % Value 2018-2022

Table 33 LBN Brand Shares of Dermatologicals: % Value 2019-2022

Table 34 LBN Brand Shares of Hair Loss Treatments: % Value 2019-2022

Table 35 Forecast Sales of Dermatologicals by Category: Value 2022-2027

Table 36 Forecast Sales of Dermatologicals by Category: % Value Growth 2022-2027

NRT SMOKING CESSATION AIDS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Growing competition from heated tobacco and e-cigarettes

Number of smokers on the rise again, reversing the trend seen in the pandemic

New flavour adds novelty to other NRT as Johnson & Johnson retains its dominant position

PROSPECTS AND OPPORTUNITIES

Competition from smoking alternatives will continue to hinder sales

Innovation may help stimulate growth in an increasingly mature category

Government expected to invest in tackling the rise in smoking prevalence, but will this benefit NRT smoking cessation aids?

CATEGORY INDICATORS

Table 37 Number of Smokers by Gender 2017-2022

CATEGORY DATA

Table 38 Sales of NRT Smoking Cessation Aids by Category: Value 2017-2022

Table 39 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2017-2022

Table 40 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2018-2022

Table 41 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2019-2022

Table 42 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2022-2027

Table 43 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2022-2027

SLEEP AIDS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of sleep aids benefiting from an uncertain world

Women suffer the most from sleep disorders

Vicks ZzzQuil Natura continues on its rise to prominence in 2022 with further investment in marketing and new product development

PROSPECTS AND OPPORTUNITIES

Sleep aids growth will be sustained by focus on prevention

Increasing time spent on smartphones will benefit the category

Sleep aids set to see further innovation

CATEGORY DATA

Table 44 Sales of Sleep Aids: Value 2017-2022

Table 45 Sales of Sleep Aids: % Value Growth 2017-2022

Table 46 NBO Company Shares of Sleep Aids: % Value 2018-2022

Table 47 LBN Brand Shares of Sleep Aids: % Value 2019-2022

Table 48 Forecast Sales of Sleep Aids: Value 2022-2027

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 49 Forecast Sales of Sleep Aids: % Value Growth 2022-2027

WOUND CARE IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sticking plasters/adhesive bandages benefits from a return to more active lifestyles

Sales of gauze, tape and other wound care set to return to pre-COVID-19 levels

Price-sensitivity increases in wound care as unit prices rise

PROSPECTS AND OPPORTUNITIES

Volume sales likely to remain flat due to high level of maturity

Pharmacies and grocery retailers will remain the key channels for wound care

Price sensitivity likely to remain high as the cost of living increases

CATEGORY DATA

Table 50 Sales of Wound Care by Category: Value 2017-2022

Table 51 Sales of Wound Care by Category: % Value Growth 2017-2022

Table 52 NBO Company Shares of Wound Care: % Value 2018-2022

Table 53 LBN Brand Shares of Wound Care: % Value 2019-2022

Table 54 Forecast Sales of Wound Care by Category: Value 2022-2027

Table 55 Forecast Sales of Wound Care by Category: % Value Growth 2022-2027

VITAMINS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Vitamin C seeing more constrained growth in 2022 as COVID-19 fears soften

Multivitamins set to benefit from the rising number of cases of cold and flu

Vitamin B benefiting from energy boosting properties

PROSPECTS AND OPPORTUNITIES

A more holistic approach to health should support growth in vitamins

E-commerce still offers plenty of potential for growth thanks to its convenience and value

Innovation should help to sustain value growth

CATEGORY DATA

Table 56 Sales of Vitamins by Category: Value 2017-2022

Table 57 Sales of Vitamins by Category: % Value Growth 2017-2022

Table 58 Sales of Multivitamins by Positioning: % Value 2017-2022

Table 59 NBO Company Shares of Vitamins: % Value 2018-2022

Table 60 LBN Brand Shares of Vitamins: % Value 2019-2022

Table 61 Forecast Sales of Vitamins by Category: Value 2022-2027

Table 62 Forecast Sales of Vitamins by Category: % Value Growth 2022-2027

DIETARY SUPPLEMENTS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Probiotics recovery key to category growth

Boosting the immune system remains important, but not a priority

Mood/relaxing dietary supplements rise to prominence due to anxiety and sleep problems

PROSPECTS AND OPPORTUNITIES

Dietary supplements set to benefit from new ingredients and targeted formulas

Demand for energy boosting dietary supplements set to rise as consumers return to busier lifestyles

Beauty supplements likely to be the subject of innovation

CATEGORY DATA

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 63 Sales of Dietary Supplements by Category: Value 2017-2022

Table 64 Sales of Dietary Supplements by Category: % Value Growth 2017-2022

Table 65 Sales of Dietary Supplements by Positioning: % Value 2017-2022

Table 66 NBO Company Shares of Dietary Supplements: % Value 2018-2022

Table 67 LBN Brand Shares of Dietary Supplements: % Value 2019-2022

Table 68 Forecast Sales of Dietary Supplements by Category: Value 2022-2027

Table 69 Forecast Sales of Dietary Supplements by Category: % Value Growth 2022-2027

WEIGHT MANAGEMENT AND WELLBEING IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Meal replacement benefits from a return to more normal lifestyles

Meal replacement sales suffering from growing financial pressures

Herbalife maintains its healthy lead but faces new competition

PROSPECTS AND OPPORTUNITIES

Rising overweight and obesity rates should support sales but growth is threatened by economic uncertainty and a switch to healthier diets

Weight loss supplements set to continue struggling

The growing popularity of protein will continue to benefit meal replacements

CATEGORY DATA

Table 70 Sales of Weight Management and Wellbeing by Category: Value 2017-2022

Table 71 Sales of Weight Management and Wellbeing by Category: % Value Growth 2017-2022

Table 72 NBO Company Shares of Weight Management and Wellbeing: % Value 2018-2022

Table 73 LBN Brand Shares of Weight Management and Wellbeing: % Value 2019-2022

Table 74 Forecast Sales of Weight Management and Wellbeing by Category: Value 2022-2027

Table 75 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2022-2027

SPORTS NUTRITION IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sports nutrition returning to pre-COVID-19 sales levels

Supply challenges leading to rising prices

Sports nutrition remains highly fragmented

PROSPECTS AND OPPORTUNITIES

Growing focus on health and wellness should help to sustain growth

Sports non-protein products and sports protein powder set for strong growth

Plant-based protein an evolving trend

CATEGORY DATA

Table 76 Sales of Sports Nutrition by Category: Value 2017-2022

Table 77 Sales of Sports Nutrition by Category: % Value Growth 2017-2022

Table 78 NBO Company Shares of Sports Nutrition: % Value 2018-2022

Table 79 LBN Brand Shares of Sports Nutrition: % Value 2019-2022

Table 80 Forecast Sales of Sports Nutrition by Category: Value 2022-2027

Table 81 Forecast Sales of Sports Nutrition by Category: % Value Growth 2022-2027

HERBAL/TRADITIONAL PRODUCTS IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of herbal/traditional digestive remedies boosted by consumers returning to foodservice outlets

The return of cold/flu boosts sales of herbal/traditional cough, cold and allergy (hay fever) remedies

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Sales of herbal/traditional sleep aids benefiting from social, economic and political uncertainty

PROSPECTS AND OPPORTUNITIES

Herbal/traditional products likely to present growing competition to standard OTC products

Innovation should help to sustain value growth

Herbal/traditional dietary supplements facing increasing rivalry from standard alternatives

CATEGORY DATA

Table 82 Sales of Herbal/Traditional Products by Category: Value 2017-2022

Table 83 Sales of Herbal/Traditional Products by Category: % Value Growth 2017-2022

Table 84 NBO Company Shares of Herbal/Traditional Products: % Value 2018-2022

Table 85 LBN Brand Shares of Herbal/Traditional Products: % Value 2019-2022

Table 86 Forecast Sales of Herbal/Traditional Products by Category: Value 2022-2027

Table 87 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2022-2027

PAEDIATRIC CONSUMER HEALTH IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return of flu and intestinal viruses supports recovery

Paediatric vitamins and dietary supplements remain popular

Paediatric analgesics remains the most important category

PROSPECTS AND OPPORTUNITIES

A positive outlook for paediatric consumer health as life gradually returns to normal

Paediatric vitamins and dietary supplements set to benefit from new product launches

Sales of paediatric consumer health likely to suffer due to falling birth rates

CATEGORY DATA

Table 88 Sales of Paediatric Consumer Health by Category: Value 2017-2022

Table 89 Sales of Paediatric Consumer Health by Category: % Value Growth 2017-2022

Table 90 Sales of Paediatric Vitamins and Dietary Supplements by Type: % Value 2017-2022

Table 91 NBO Company Shares of Paediatric Consumer Health: % Value 2018-2022

Table 92 LBN Brand Shares of Paediatric Consumer Health: % Value 2019-2022

Table 93 Forecast Sales of Paediatric Consumer Health by Category: Value 2022-2027

Table 94 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2022-2027

EYE CARE IN ITALY

KEY DATA FINDINGS

2022 DEVELOPMENTS

Eye care continues to benefit from high exposure to digital screens

Standard eye care remains a fragmented landscape led by domestic players

Allergy care on the path to recovery as restrictions are eased

PROSPECTS AND OPPORTUNITIES

Digitalisation of society set to support sales

Ageing of the population will boost demand for standard eye care

Allergies set to impact a growing number of consumers, but competition from other products likely to be a barrier to growth

CATEGORY DATA

Table 95 Sales of Eye Care by Category: Value 2017-2022

Table 96 Sales of Eye Care by Category: % Value Growth 2017-2022

Table 97 NBO Company Shares of Eye Care: % Value 2018-2022

Table 98 LBN Brand Shares of Eye Care: % Value 2019-2022

Table 99 Forecast Sales of Eye Care by Category: Value 2022-2027

Table 100 Forecast Sales of Eye Care by Category: % Value Growth 2022-2027

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Consumer Health in Italy

Market Direction | 2022-09-19 | 117 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2200.00
	Multiple User License (1 Site)	€4400.00
	Multiple User License (Global)	€6600.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-09"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com