

Consumer Health in Germany

Market Direction | 2023-12-14 | 112 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 in Germany was recording moderate current value growth in 2023. While OTC was performing better than vitamins and dietary supplements, it was being outperformed by categories such as sports nutrition and weight management and wellbeing.

Euromonitor International's Consumer Health in Germany report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2018-2022, allowing you to identify the sectors driving growth. Forecasts to 2027 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.

Table of Contents:

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 Germany Euromonitor International December 2023

List Of Contents And Tables

CONSUMER HEALTH IN GERMANY

EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer health?

MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

Table 2 Life Expectancy at Birth 2018-2023

MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2018-2023

Table 4 Sales of Consumer Health by Category: % Value Growth 2018-2023

Table 5 NBO Company Shares of Consumer Health: % Value 2019-2023

Table 6 LBN Brand Shares of Consumer Health: % Value 2020-2023

Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 ☐Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 ☐Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

Summary 1 OTC: Switches 2022-2023

DISCLAIMER DEFINITIONS

SOURCES

Summary 2 Research Sources

ANALGESICS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising cases of cold and influenza drive growth

"Give me a quick solution" to my pain

Topical analgesics also in demand thanks to fitness enthusiasts and elderly consumers

PROSPECTS AND OPPORTUNITIES

Stressful lifestyles and demographic trends to support future growth

No changes expected in the competitive landscape of analgesics

E-commerce sales likely to increase over the forecast period

CATEGORY DATA

Scotts International, EU Vat number: PL 6772247784

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

Table 12 Sales of Analgesics by Category: Value 2018-2023

Table 13 Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cough and cold remedies to benefit from another flu season in 2023/2024

Cough remedies and pharyngeal preparations in demand

Procter & Gamble continues to lead cough, cold and allergy (hay fever) remedies

PROSPECTS AND OPPORTUNITIES

Continued growth expected for cough, cold and allergy (hay fever) remedies

Growth expected in antihistamines/allergy remedies (systemic) as the allergy season is expanding

Paediatric cough, cold and allergy remedies with growth potential

CATEGORY DATA

Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

DIGESTIVE REMEDIES IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Digestive remedies record stable growth

E-commerce continues to gain share

Dietary supplements is a competitor to digestive remedies

PROSPECTS AND OPPORTUNITIES

Growth potential is likely to be limited in what is a saturated category

Digestive disorders among the elderly may represent an opportunity

CATEGORY DATA

Table 24 Sales of Digestive Remedies by Category: Value 2018-2023

Table 25 Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 26 NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 27 LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 28 Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 29 Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

DERMATOLOGICALS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dermatologicals continues to record positive current value growth

Lice treatments back in demand post-pandemic

Discretion important for sales of dermatologicals

PROSPECTS AND OPPORTUNITIES

Positive current value growth expected for dermatologicals, with hair loss treatments remaining most dynamic over the forecast

Scotts International, EU Vat number: PL 6772247784

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

period

Rising number of infections and climate change to drive sales of cold sore treatments

Power ingredients will emerge

CATEGORY DATA

Table 30 Sales of Dermatologicals by Category: Value 2018-2023

Table 31 Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 32 NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 33 LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 34 LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 35 Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 36 Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

NRT SMOKING CESSATION AIDS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modest positive current value growth thanks to price increases

Johnson & Johnson introduces "smart" Nicorette spray

The non-smoking alliance is campaigning for smoking cessation

PROSPECTS AND OPPORTUNITIES

Growth is likely to be curbed by e-cigarettes and heated tobacco products

E-commerce likely to gain ground

CATEGORY INDICATORS

Table 37 Number of Smokers by Gender 2018-2023

CATEGORY DATA

Table 38 Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 39 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 40 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 41 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 42 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 43 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

SLEEP AIDS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modest volume growth and falling current value sales for sleep aids as unit prices decline slightly

STADA continues to lead sleep aids but ZzzQuil sees the most dynamic growth

PROSPECTS AND OPPORTUNITIES

Competition from alternative products

Nature of modern lifestyles still provides opportunities for sleep aids

CATEGORY DATA

Table 44 Sales of Sleep Aids: Value 2018-2023

Table 45 Sales of Sleep Aids: % Value Growth 2018-2023

Table 46 NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 47 LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 48 Forecast Sales of Sleep Aids: Value 2023-2028

Table 49 Forecast Sales of Sleep Aids: % Value Growth 2023-2028

EYE CARE IN GERMANY KEY DATA FINDINGS 2023 DEVELOPMENTS

Scotts International, EU Vat number: PL 6772247784

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

Eye care sales supported by consumers' digital activities

Allergy eye care remains strong in 2023

PROSPECTS AND OPPORTUNITIES

Positive outlook for eye care

More hygienic solutions supported by pack sizes and formats

Eye health supplements could shake up the OTC eye care category

CATEGORY DATA

Table 50 Sales of Eye Care by Category: Value 2018-2023

Table 51 Sales of Eye Care by Category: % Value Growth 2018-2023

Table 52 NBO Company Shares of Eye Care: % Value 2019-2023

Table 53 LBN Brand Shares of Eye Care: % Value 2020-2023

Table 54 Forecast Sales of Eye Care by Category: Value 2023-2028

Table 55 Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

WOUND CARE IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wound care with stable demand

Competitive landscape remains unchanged

Polarisation continues to be seen

PROSPECTS AND OPPORTUNITIES

Growing interest in sport-specific wound care

Functionality set to remain a key focus of innovation and new product development

Private label will continue to represent strong competition

CATEGORY DATA

Table 56 Sales of Wound Care by Category: Value 2018-2023

Table 57 Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 LBN Brand Shares of Wound Care: % Value 2020-2023

Table 60 Forecast Sales of Wound Care by Category: Value 2023-2028

Table 61 Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

VITAMINS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stabilisation, but the demand for vitamins remains strong

Vitamin-enriched food and beverages are representing competition

PROSPECTS AND OPPORTUNITIES

Mindful purchasing habits to shape the category dynamics

Personalisation expected to become a trend in vitamins

Further development of private label expected

CATEGORY DATA

Table 62 Sales of Vitamins by Category: Value 2018-2023

Table 63 Sales of Vitamins by Category: % Value Growth 2018-2023

Table 64 Sales of Multivitamins by Positioning: % Value 2018-2023

Table 65 NBO Company Shares of Vitamins: % Value 2019-2023

Table 66 LBN Brand Shares of Vitamins: % Value 2020-2023

Table 67 Forecast Sales of Vitamins by Category: Value 2023-2028

Table 68 Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

Scotts International, EU Vat number: PL 6772247784

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

DIETARY SUPPLEMENTS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dietary supplements stabilises

Energy-boosting supplements in demand

Dietary supplements remains highly fragmented

PROSPECTS AND OPPORTUNITIES

Dietary supplements expected to register stable growth over the forecast period

E-commerce is expected to continue to develop and grow as a distribution channel

CATEGORY DATA

Table 69 Sales of Dietary Supplements by Category: Value 2018-2023

Table 70 Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 71 Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 72 NBO Company Shares of Dietary Supplements: % Value 2019-2023

Table 73 LBN Brand Shares of Dietary Supplements: % Value 2020-2023

Table 74 Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 75 Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

WEIGHT MANAGEMENT AND WELLBEING IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weight management and wellbeing recording positive results

Meal replacement the most dynamic category

PROSPECTS AND OPPORTUNITIES

Promising outlook for weight management and wellbeing

Convenience and personalisation to help drive the growth of weight management and wellbeing

CATEGORY DATA

Table 76 Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 77 Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 78 NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 79 LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 80 Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 81 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

SPORTS NUTRITION IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong focus on health and wellness results in dynamic growth for sports nutrition

Increasing interest in private label products

Innovation and functionality are key

PROSPECTS AND OPPORTUNITIES

Health and wellness trends to continue driving solid growth

Personalisation will continue to be seen

Plant-based products to increase the customer base

CATEGORY DATA

Table 82 Sales of Sports Nutrition by Category: Value 2018-2023

Table 83 Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 84 NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 85 LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Scotts International, EU Vat number: PL 6772247784

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

Table 86 Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 87 Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

HERBAL/TRADITIONAL PRODUCTS IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued growth for herbal/traditional products

Demand for cold, cough and allergy remedies remains stronger than for sleep aids

PROSPECTS AND OPPORTUNITIES

Efficacy and naturalness will drive growth in herbal/traditional products

New ingredients and formats to gain popularity

Competitive landscape likely to remain fragmented

CATEGORY DATA

Table 88 Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

PAEDIATRIC CONSUMER HEALTH IN GERMANY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Paediatric cold, cough and allergy remedies records the strongest growth in 2023

Paediatric vitamins and dietary supplements on a positive track

PROSPECTS AND OPPORTUNITIES

Changing demographics could pose challenges

Continued demand for paediatric dermatologicals

Innovations and new product developments will help drive growth

CATEGORY DATA

Table 94 Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2023-2028



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Consumer Health in Germany

Market Direction | 2023-12-14 | 112 pages | Euromonitor

Select license	License			Price
	Single User Licence		€2200.00	
	Multiple User License (1 Site)		€4400.00	
	Multiple User License (Global)		€6600.00	
			VA	
			Tota	al
mail*		Phone*		
mail*		Phone*		
rst Name*		Last Name*		
		Last Name*		
bb title*		Last Name* EU Vat / Tax ID	/ NIP number*	
ob title* Company Name*			/ NIP number*	
ob title* Company Name* Address*		EU Vat / Tax ID	/ NIP number*	
First Name* ob title* Company Name* Address* Zip Code*		EU Vat / Tax ID	/ NIP number*	

Scotts International. EU Vat number: PL 6772247784

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