

Consumer Health in Italy

Market Direction | 2024-09-18 | 118 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2675.00
- Multiple User License (1 Site) €5350.00
- Multiple User License (Global) €8025.00

Report description:

The consumer health market in Italy is set to record moderate current value growth in 2024. Expectations for the flu season were initially positive, but were partly disappointed by a very strong but short-lived flu wave, which led to an early drop in sales in the related categories, such as analgesics and cough, cold and allergy (hay fever) remedies. In contrast, the early arrival of the warm season boosted sales of anti-allergy products and antihistamines, with an expected increase in the key s...

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 2019-2023, allowing you to identify the sectors driving growth. Forecasts to 2028 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 2024

List Of Contents And Tables

CONSUMER HEALTH IN ITALY

EXECUTIVE SUMMARY

Consumer health in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for consumer health?

MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2019-2024

Table 2 Life Expectancy at Birth 2019-2024

MARKET DATA

Table 3 Sales of Consumer Health by Category: Value 2019-2024

Table 4 Sales of Consumer Health by Category: % Value Growth 2019-2024

Table 5 NBO Company Shares of Consumer Health: % Value 2020-2024

Table 6 LBN Brand Shares of Consumer Health: % Value 2021-2024

Table 7 Penetration of Private Label in Consumer Health by Category: % Value 2019-2024

Table 8 Distribution of Consumer Health by Format: % Value 2019-2024

Table 9 Distribution of Consumer Health by Format and Category: % Value 2024

Table 10 □Forecast Sales of Consumer Health by Category: Value 2024-2029

Table 11 □Forecast Sales of Consumer Health by Category: % Value Growth 2024-2029

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

2024 DEVELOPMENTS

Unexpectedly short flu season stalls analgesics sales

Ibuprofen's broad appeal fuels growth despite unusual flu season driven by quick release formulations

Topical analgesics/anaesthetic continues to suffer from the poor performance of patches and competition from non-medicated options.

PROSPECTS AND OPPORTUNITIES

Chronic pain treatment as an opportunity for analgesics despite competition from non-pharmacological alternatives

Women's health focus to drive growth for specifically targeted analgesics

Topical analgesics/anaesthetic category to shift to more comfortable formats and better user experience

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

CATEGORY DATA

Table 12 Sales of Analgesics by Category: Value 2019-2024

Table 13 Sales of Analgesics by Category: % Value Growth 2019-2024

Table 14 NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 LBN Brand Shares of Analgesics: % Value 2021-2024

Table 16 Forecast Sales of Analgesics by Category: Value 2024-2029

Table 17 Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Short flu season and early summer hinder cough and cold remedy sales

Nasal decongestants sees decline as disinvestment fuels shift to natural, isotonic options

Antihistamines sales surge due to early spring

PROSPECTS AND OPPORTUNITIES

Natural remedies on the rise as propolis and echinacea challenge standard cough and cold drugs

E-commerce requires engaging strategies for cough and cold remedies amidst scepticism and demand for speedy relief

Government renews free flu vaccination campaign for high-risk groups, while information on medicines containing pseudoephedrine is updated

CATEGORY DATA

Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

DIGESTIVE REMEDIES IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Laxatives drives digestive remedies in Italy with osmotic products gaining traction amongst ageing population and remote workers

Antacids sees moderate growth as ageing population and unhealthy habits take over

Travellers' sickness remedies benefit from dual boost of inbound and outbound tourism

PROSPECTS AND OPPORTUNITIES

The digestive remedies category is set to adapt to wellness trend and new generations' needs

Antacids category can expand by targeting growing reflux concerns

Price conscious seniors may rethink digestive remedies spending as they face economic uncertainty

CATEGORY DATA

Table 24 Sales of Digestive Remedies by Category: Value 2019-2024

Table 25 Sales of Digestive Remedies by Category: % Value Growth 2019-2024

Table 26 NBO Company Shares of Digestive Remedies: % Value 2020-2024

Table 27 LBN Brand Shares of Digestive Remedies: % Value 2021-2024

Table 28 Forecast Sales of Digestive Remedies by Category: Value 2024-2029

Table 29 Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

DERMATOLOGICALS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dermatologicals category slows down after price hikes, lacking growth drivers in the post-COVID-19 era

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Early heat fuels antihistamines boom as Italians seek relief outdoors after pandemic

Stress and alopecia amongst young people drive hair loss market with minoxidil holding strong despite the rising natural trend

PROSPECTS AND OPPORTUNITIES

Children's dermatological products see continued decline due to progressively falling birth rates

Minoxidil and ketoconazole based products will continue to thrive as stress fuels growth in anti-dandruff and scalp care in Italy

Cosmetics increasingly challenging OTC dermatologicals and blurring lines for sensitive skin and hair loss products

CATEGORY DATA

Table 30 Sales of Dermatologicals by Category: Value 2019-2024

Table 31 Sales of Dermatologicals by Category: % Value Growth 2019-2024

Table 32 NBO Company Shares of Dermatologicals: % Value 2020-2024

Table 33 LBN Brand Shares of Dermatologicals: % Value 2021-2024

Table 34 LBN Brand Shares of Hair Loss Treatments: % Value 2021-2024

Table 35 Forecast Sales of Dermatologicals by Category: Value 2024-2029

Table 36 Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

NRT SMOKING CESSATION AIDS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

In a shrinking NRT smoking cessation aids market, sprays are seen as an innovation opportunity to limit decline

Affordable prescription alternatives drive shift in smoking cessation behaviour, putting additional pressure on NRT products

New tobacco alternatives increasingly gaining traction amongst consumers, posing a further threat to NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

Potential restrictions on e-cigarettes and heated tobacco could open the door for NRT smoking cessation aids rebound

Economic downturn weakens NRT smoking cessation aids as consumers prioritise essential spending and explore alternative smoking cessation approaches

Newly approved nicotine pouches threaten Italian NRT smoking cessation aids category with lower prices, new flavours, and appeal to younger smokers

CATEGORY INDICATORS

Table 37 Number of Smokers by Gender 2019-2024

CATEGORY DATA

Table 38 Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024

Table 39 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024

Table 40 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024

Table 41 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024

Table 42 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029

Table 43 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

SLEEP AIDS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sleep aids category stabilises as post-pandemic calmness lowers demand and economic factors drive growth of reimbursed options

Market consolidation sees small players exiting and major brands investing in R&D and more appealing formats

Melatonin mainstay faces challenge from rise of traditional and natural Ingredients like chamomile and valerian

PROSPECTS AND OPPORTUNITIES

Growing elderly population will drive demand for sleep disorder solutions

Post-pandemic wellness trend threatens traditional sleep aids as consumers embrace preventive measures for better sleep

Natural ingredients and niche products offer potential to expand the market beyond traditional users, targeting gamers, women's

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

specific needs and remote workers

CATEGORY DATA

Table 44 Sales of Sleep Aids: Value 2019-2024

Table 45 Sales of Sleep Aids: % Value Growth 2019-2024

Table 46 NBO Company Shares of Sleep Aids: % Value 2020-2024

Table 47 LBN Brand Shares of Sleep Aids: % Value 2021-2024

Table 48 Forecast Sales of Sleep Aids: Value 2024-2029

Table 49 Forecast Sales of Sleep Aids: % Value Growth 2024-2029

EYE CARE IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Early spring allergies prompt eye care sales growth, but artificial tears retains lead in the category

Ageing population and digital habits lead to dry eye issues fostering demand for eye care products

Contact lens surge drives demand for eye hygiene and moisture products

PROSPECTS AND OPPORTUNITIES

Ageing population trend in Italy expected to increase demand for anti-degenerative supplements and senior-oriented eye care solutions

Elevated air pollution levels in Italy poised to drive demand for protective eye care products

Increasingly active lifestyles in Italy expected to drive demand for sport-specific and allergy relief eye care products

CATEGORY DATA

Table 50 Sales of Eye Care by Category: Value 2019-2024

Table 51 Sales of Eye Care by Category: % Value Growth 2019-2024

Table 52 NBO Company Shares of Eye Care: % Value 2020-2024

Table 53 LBN Brand Shares of Eye Care: % Value 2021-2024

Table 54 Forecast Sales of Eye Care by Category: Value 2024-2029

Table 55 Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

WOUND CARE IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Italian wound care category sees slow growth with sustainability emerging as differentiator

Surgical backlog fuels recovery in post-operative adhesive bandages category

Growing focus on sports and outdoor activities drives demand for general purpose sticking plasters

PROSPECTS AND OPPORTUNITIES

Consumer focus on price in wound care may hinder future growth due to focus on private label products

Supermarkets and e-commerce poised for growth in Italy's price-driven wound care category

Demographic shift in Italy can drive innovation focusing on senior-oriented wound care solutions

CATEGORY DATA

Table 56 Sales of Wound Care by Category: Value 2019-2024

Table 57 Sales of Wound Care by Category: % Value Growth 2019-2024

Table 58 NBO Company Shares of Wound Care: % Value 2020-2024

Table 59 LBN Brand Shares of Wound Care: % Value 2021-2024

Table 60 Forecast Sales of Wound Care by Category: Value 2024-2029

Table 61 Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

VITAMINS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Single vitamins sees vitamin B grow as hectic lifestyles counteract vitamin C's post-pandemic decline

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Consumers' lifestyle approach and preference for personalised supplements hinders development of multivitamins
Price and convenience drive e-commerce growth in vitamins, but pharmacies remain go-to places for personalised advice

PROSPECTS AND OPPORTUNITIES

Vitamin B supplements could emerge as preventive measure for cognitive decline in Italy's ageing population
Gummy and colloid vitamins could become a major trend by meeting consumer demand for convenience and easy intake
E-commerce set to attract price conscious consumers

CATEGORY DATA

Table 62 Sales of Vitamins by Category: Value 2019-2024
Table 63 Sales of Vitamins by Category: % Value Growth 2019-2024
Table 64 Sales of Multivitamins by Positioning: % Value 2019-2024
Table 65 NBO Company Shares of Vitamins: % Value 2020-2024
Table 66 LBN Brand Shares of Vitamins: % Value 2021-2024
Table 67 Forecast Sales of Vitamins by Category: Value 2024-2029
Table 68 Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

DIETARY SUPPLEMENTS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Probiotics category matures as gut health awareness remains strong despite milder flu season
Women's focus on "beauty from within" drives demand for supplements promoting general health and visible wellbeing.
Economic uncertainty drives value conscious consumer shift towards cost effective and multifunctional supplements

PROSPECTS AND OPPORTUNITIES

Targeted solutions and holistic wellbeing to fuel future growth In the Italian dietary supplements category
Italian dietary supplements category prioritises longevity solutions targeting brain health, bone support, and convenient formats for ageing population
Minerals poised for expansion with year-round focus and consumer education

CATEGORY DATA

Table 69 Sales of Dietary Supplements by Category: Value 2019-2024
Table 70 Sales of Dietary Supplements by Category: % Value Growth 2019-2024
Table 71 Sales of Dietary Supplements by Positioning: % Value 2019-2024
Table 72 NBO Company Shares of Dietary Supplements: % Value 2020-2024
Table 73 LBN Brand Shares of Dietary Supplements: % Value 2021-2024
Table 74 Forecast Sales of Dietary Supplements by Category: Value 2024-2029
Table 75 Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

WEIGHT MANAGEMENT AND WELLBEING IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Weight loss supplements face continued decline amidst consumer scepticism and evolving preferences
Italian consumers embrace on-the-go meal replacement amidst economic challenges
Blurred lines with infusions and perceived inefficacy challenge slimming teas growth

PROSPECTS AND OPPORTUNITIES

Supplement nutrition drinks set to emerge as key solution for Italy's ageing population
Weight management and wellbeing needs a rethink as consumers embrace tailored solutions and professional guidance
Weight management faces erosion as sports nutrition and protein-enriched foods align with wellness goals

CATEGORY DATA

Table 76 Sales of Weight Management and Wellbeing by Category: Value 2019-2024
Table 77 Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
Table 78 NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Table 79 LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024

Table 80 Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029

Table 81 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

SPORTS NUTRITION IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growing interest in sporting activities contributes to the sustained growth of sports nutrition despite consumers paying higher prices

Protein powders embrace premiumisation and targeted innovation through e-commerce channels

Consumers prioritise flexibility and value over convenience, hindering RTD protein growth

PROSPECTS AND OPPORTUNITIES

Rising popularity of high protein foods could impact sports nutrition growth

Emerging sporting disciplines will fuel growth in non-protein sports nutrition with focus on energy, hydration, and recovery

Sports nutrition players can keep leveraging major events for brand awareness and market expansion

CATEGORY DATA

Table 82 Sales of Sports Nutrition by Category: Value 2019-2024

Table 83 Sales of Sports Nutrition by Category: % Value Growth 2019-2024

Table 84 NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 85 LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 86 Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 87 Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

HERBAL/TRADITIONAL PRODUCTS IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Herbal/traditional dietary supplements category navigates accessible healthcare and cost-conscious consumers in the post-COVID-19 period

Herbal/traditional products sees fluctuations in stress-related products, while cognitive support soars

Fragmented competitive landscape as consumers show trust in small, family-run businesses

PROSPECTS AND OPPORTUNITIES

Natural trend set to see further development as Italian consumers seek herbal options across multiple segments

Pharmaceutical companies increasingly leveraging herbal lines to compete in expanding wellness market

Economic downturn could create landscape for growth as consumers seek budget-friendly natural solutions.

CATEGORY DATA

Table 88 Sales of Herbal/Traditional Products by Category: Value 2019-2024

Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2019-2024

Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024

Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024

Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2024-2029

Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2024-2029

PAEDIATRIC CONSUMER HEALTH IN ITALY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Paediatric consumer health navigates unexpected flu season, prioritising skin care and sustained demand for vitamins

Paediatric vitamins and dietary supplements thrive on parental trust and evolving doctor recommendations

Compelling product presentations are key to unlocking doctor advocacy and market growth

PROSPECTS AND OPPORTUNITIES

Paediatric consumer health to prioritise innovation and portfolio adjustments to offset impact of decline in birth rate

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Paediatric supplements have room to expand and address new mental wellbeing needs

Vitamins and dietary supplements of organic origin set to be adopted by parents and paediatricians for the wellbeing of children

CATEGORY DATA

Table 94 Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 95 Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 96 NBO Company Shares of Paediatric Consumer Health: % Value 2020-2024

Table 97 LBN Brand Shares of Paediatric Consumer Health: % Value 2021-2024

Table 98 Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 99 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2024-2029

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 | 2024-09-18 | 118 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	€2675.00
	Multiple User License (1 Site)	€5350.00
	Multiple User License (Global)	€8025.00
		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="2025-05-10"/>
		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