

Consumer Health in South Africa

Market Direction | 2024-10-10 | 103 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

Consumer health in South Africa continues to record a positive performance in value growth terms, driven by the impact of inflation on unit prices, with the latter experiencing a further rise in 2024. South Africa remains challenged by various several factors, including inflationary pressures, high interest rates (to combat the elevated level of inflation), and the continual burden of loadshedding on the local economy, which places pressure on consumers' disposable incomes.

Euromonitor International's Consumer Health in South Africa 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 South Africa
Euromonitor International
October 2024

List Of Contents And Tables

CONSUMER HEALTH IN SOUTH AFRICA

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Analgesics remains popular for treating various ailments in South Africa
Affordability of generics and private label during a time of inflationary pressure
Pharmacies remains as dominant distribution channel for analgesics

PROSPECTS AND OPPORTUNITIES

Consumers to seek analgesics that target specific pain points
Albeit from low base, sales of online analgesics set to grow
Analgesics can benefit from wider distribution in South Africa

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 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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Long flu season boosts category sales in 2024

Consumer trust in herbal/traditional cough, cold and allergy (hay fever) remedies

Price-sensitive consumers shift towards more affordable options

PROSPECTS AND OPPORTUNITIES

Consumers favour bulk purchases when on promotion

Antihistamines/allergy remedies (systemic) used as alternative sleep aids

South Africans willing to spend more money on paediatric cough/cold remedies

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Reliance on dining out is catalyst for digestive issues in South Africa

Rising sales of herbal/traditional digestive remedies

Price-sensitive consumers attracted to more affordable alternatives

PROSPECTS AND OPPORTUNITIES

Interesting packaging and formats attract consumers' attention

Pharmacists' advice influences purchases of digestive remedies

Further growth potential for herbal/traditional options due to natural perception

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Nappy (diaper) rash treatments remains essential product for local parents

Price-sensitive consumers seek alternative solutions

Consumers rely on pharmacists when seeking dermatologicals

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

Lines between dermatologicals and dermocosmetics are blurring

Vaginal antifungals remain taboo to purchase in South Africa

Visits to a dermatologist unaffordable for many consumers

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

NRT smoking cessation aids remains a small category within consumer health

Limited awareness and brand visibility for NRT smoking cessation aids

Johnson & Johnson (Pty) Ltd retains dominance of competitive landscape

PROSPECTS AND OPPORTUNITIES

Rising popularity of vaping in South Africa to offer further competition

Implementation of alternative schemes in South Africa to reduce smoking rate

Lack of accessibility to NRT smoking cessation aids to limit overall reach

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

High stress levels and exposure to blue light contribute to growth of sleep aids

Herbal/traditional sleep aids drive demand due to natural perception

Mental health issues contribute to rising demand for professional support

PROSPECTS AND OPPORTUNITIES

Adopting healthy lifestyles to potentially reduce reliance on sleep aids

CBD set to gain traction and shelf space in popular retailers

Regulation around OTC sleep aids aims to reduce misuse

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

EYE CARE IN SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Prolonged exposure to blue light stimulates growth for standard eye care
Demand for allergy eye care continues to rise in South Africa
Local consumers of eye care remain brand loyal

PROSPECTS AND OPPORTUNITIES

Players should consider collaborations with optical goods stores to drive sales
Importance of ensuring wider visibility in pharmacies and advertising channels
Private label offers attractive option for price-sensitive consumers

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wound care in South Africa remains a small consumer health category
Wound care considered non-essential by many local consumers
Elastoplast retains lead of highly consolidated competitive landscape

PROSPECTS AND OPPORTUNITIES

Future growth potential over forecast period despite lack of innovation
Consumers seek more affordable wound care options

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Post-pandemic demand for vitamins remains high but growth is low
Consumers seek vitamins as part of holistic skin care routines
Vitamins predominantly bought by consumers following doctor's recommendation

PROSPECTS AND OPPORTUNITIES

Vitamins to remain popular among a niche target audience
Holistic approach to health and wellness likely to pose competition

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for dietary supplements rises despite prioritising of budgets

Dietary supplements remains a highly fragmented competitive landscape

E-commerce helps drive brand visibility

PROSPECTS AND OPPORTUNITIES

Slowing growth for dietary supplements as consumers continue to prioritise expenditure

Opportunities for more affordable alternatives

New product development and innovation still likely

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for weight management and wellbeing mainly driven by more affluent consumers

South Africans increasingly prioritise active lifestyles, reducing reliance on weight management

Rising interest in alternative weight loss methods for lower-income consumers

PROSPECTS AND OPPORTUNITIES

Despite price pressures, weight management and wellbeing still offers further growth potential in South Africa

High-income consumers make use of alternative weight management methods

Direct selling and pharmacies to remain as leading distribution channels

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

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports nutrition purchased by niche target audience in South Africa

Sports protein powder remains most popular option as it expands its reach

Consumers are brand loyal when it comes to a specific sports nutrition product

PROSPECTS AND OPPORTUNITIES

Optimistic outlook as sport nutrition expands to wider audience

South Africans increasingly seek convenient packaging and formats

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 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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Herbal/traditional products appeal to consumers due to natural positioning

Increasing number of players invest in herbal/traditional products

Private label expands herbal/traditional offerings for more affordable options

PROSPECTS AND OPPORTUNITIES

Positive outlook for herbal/traditional products in South Africa

Affordability still remains a significant concern for many South Africans

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 SOUTH AFRICA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Willingness to spend on paediatric consumer health despite inflationary pressures

Nappy (diaper) rash treatments remains a stable category despite falling birth rate

Brand loyalty is notable in paediatric consumer health products

PROSPECTS AND OPPORTUNITIES

Paediatric consumer health to benefit from parents having dedicated budget for their children's needs

Immune support to drive strong performance predicted for paediatric vitamins and dietary supplements

Omnichannel approach to sales likely to prevail

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 South Africa

Market Direction | 2024-10-10 | 103 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="2026-03-10"/>
		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