

# Consumer Health in South Africa

October 2023

Table of Contents

## Consumer Health in South Africa

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

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

Table 9 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 10 - 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

### DISCLAIMER

### DEFINITIONS

### SOURCES

Summary 1 - Research Sources

## Analgesics in South Africa

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Analgesics remains a highly popular category

Generic analgesics gains popularity as consumers become more price sensitive

Pharmacists play a vital role in dispensing analgesics

### PROSPECTS AND OPPORTUNITIES

Growing consumer interest in specific analgesics that target specific body areas

Analgesics are increasingly purchased via retail e-commerce

Analgesics benefits from a wider distribution range

### CATEGORY DATA

Table 11 - Sales of Analgesics by Category: Value 2018-2023

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

Table 13 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 14 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 15 - Forecast Sales of Analgesics by Category: Value 2023-2028

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

## Sleep Aids in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sleep aids medication faces competition from prescribed sleeping aids

Consumers seek out alternatives with herbal and natural ingredients

Inflation and the rising cost of living elevate consumer stress, anxiety and depression which drives demand for sleep aids

#### PROSPECTS AND OPPORTUNITIES

Consumers prioritise their mental wellbeing and rely less on sleep aids

The regulations around sleep aids dampen category growth

CBD products gain more shelf space over the forecast period as they throw off negative perceptions

#### CATEGORY DATA

Table 17 - Sales of Sleep Aids: Value 2018-2023

Table 18 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 19 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 20 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 21 - Forecast Sales of Sleep Aids: Value 2023-2028

Table 22 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

## Cough, Cold and Allergy (Hay Fever) Remedies in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The flu season provides an annual boost to category sales

Consumers increasingly seek out natural and herbal alternatives

Consumers demand cheaper and more affordable options

#### PROSPECTS AND OPPORTUNITIES

Consumers abuse antihistamines/allergy remedies (systemic) to address sleep issues

Consumers often buy antihistamines/allergy remedies (systemic) when on promotion

Parents willing to pay slightly more for paediatric cough, cold and allergy remedies

#### CATEGORY DATA

Table 23 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 25 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 26 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 27 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

## Dermatologicals in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pharmacists remain vital health professionals in dispensing dermatological products

Growing price sensitivity forces consumers to seek out cheaper alternatives

Nappy (diaper) rash treatments considered essential among many parents

## PROSPECTS AND OPPORTUNITIES

Certain medical conditions remain taboo, preventing consumers from purchasing dermatologicals

Consumers perceive a fine line between dermatologicals and dermocosmetics

Potential sales lost as many consumers cannot afford to visit a dermatologist

## CATEGORY DATA

Table 29 - Sales of Dermatologicals by Category: Value 2018-2023

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

Table 31 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 32 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 33 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 34 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

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

## Digestive Remedies in South Africa

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Rising demand for fast food services in South Africa boost sales of digestive remedies

Growing price sensitivity among consumers as economic constraints put pressure on disposable incomes

Growing consumer awareness of the importance of gut health stimulates demand for herbal/traditional herbal digestive remedies

## PROSPECTS AND OPPORTUNITIES

Consumers seek different product formats to meet the needs of their busy lifestyles

Consumers rely on pharmacists rather than doctors when seeking relief from digestive conditions

Consumers seek herbal/traditional products for digestive issues

## CATEGORY DATA

Table 36 - Sales of Digestive Remedies by Category: Value 2018-2023

Table 37 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 38 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 39 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 40 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 41 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

## Eye Care in South Africa

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Growth in the incidence of eye issues stimulate sales of eye care

Consumers are brand loyal when it comes to eye care products

Allergy eye care outperforms standard eye care in 2023 due to growing instances of allergies in the country

## PROSPECTS AND OPPORTUNITIES

Ongoing consumer price sensitivity influences purchasing decisions over the forecast period

Brands have to work hard to improve brand visibility

Collaborations with optical goods stores contribute to sales growth

## CATEGORY DATA

Table 42 - Sales of Eye Care by Category: Value 2018-2023

Table 43 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 44 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 45 - LBN Brand Shares of Eye Care: % Value 2020-2023

Table 46 - Forecast Sales of Eye Care by Category: Value 2023-2028

Table 47 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

## NRT Smoking Cessation Aids in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

NRT smoking cessation aids is a small category driven mainly by high income demographics

The category suffers from limited brand visibility

Johnson & Johnson maintains its leading position

#### PROSPECTS AND OPPORTUNITIES

Smoking alternatives, such as e-cigarettes, are available for consumers, while vaping in particular sees considerable growth in popularity

Various smoking strategies curb smoking in South Africa

Lack of product accessibility dampens consumer awareness and hampers future sales

#### CATEGORY INDICATORS

Table 48 - Number of Smokers by Gender 2018-2023

#### CATEGORY DATA

Table 49 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 50 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 51 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 52 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 53 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

## Wound Care in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Wound care is a small category in 2023 due to a lack of demand

Wound care is considered non-essential in South Africa and only bought when a need arises

Leading brands such as Elastoplast drive category innovation

#### PROSPECTS AND OPPORTUNITIES

Consumers seek the cheapest alternatives when it comes to wound care

There is little to no innovation within this category

Limited if positive growth of wound care over the forecast period

#### CATEGORY DATA

Table 55 - Sales of Wound Care by Category: Value 2018-2023

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

Table 57 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 58 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 59 - Forecast Sales of Wound Care by Category: Value 2023-2028

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

## Sports Nutrition in South Africa

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Sports nutrition is a lifestyle product that only appeals to a niche audience  
Consumers eschew sports nutrition due to inflationary pressures  
Sports nutrition products are driven by sales and promotions

## PROSPECTS AND OPPORTUNITIES

The health and wellness trend remains a strong growth driver of sports nutrition  
Protein/energy bars are considered a meal replacement for busy consumers  
Consumers seek interesting formats for sports nutrition products

## CATEGORY DATA

Table 61 - Sales of Sports Nutrition by Category: Value 2018-2023  
Table 62 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023  
Table 63 - NBO Company Shares of Sports Nutrition: % Value 2019-2023  
Table 64 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023  
Table 65 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028  
Table 66 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Dietary supplements is not a priority for most consumers and only appeals to a niche group of consumers  
With economic hardship more consumers turn to home remedies instead of dietary supplements  
Dietary supplements remains a highly fragmented category

#### PROSPECTS AND OPPORTUNITIES

Economic challenges dampen forecast period growth  
Consumers remain price sensitive  
Opportunity for private label to develop cheaper options

#### CATEGORY DATA

Table 67 - Sales of Dietary Supplements by Category: Value 2018-2023  
Table 68 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023  
Table 69 - Sales of Dietary Supplements by Positioning: % Value 2018-2023  
Table 70 - NBO Company Shares of Dietary Supplements: % Value 2019-2023  
Table 71 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023  
Table 72 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028  
Table 73 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

## Vitamins in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Demand grows for vitamins in South Africa as consumers prioritise skin care  
The rising cost of living makes vitamins less of a priority for some due to declining disposable incomes  
Private label products provide consumers with more units at lower prices

#### PROSPECTS AND OPPORTUNITIES

Vitamins return to being popular only among a niche audience after peaking during the pandemic  
Consumers seek interesting formats in vitamins  
Consumers sacrifice vitamins for themselves in favour of vitamins suitable for their pets

## CATEGORY DATA

Table 74 - Sales of Vitamins by Category: Value 2018-2023

Table 75 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 76 - Sales of Multivitamins by Positioning: % Value 2018-2023

Table 77 - NBO Company Shares of Vitamins: % Value 2019-2023

Table 78 - LBN Brand Shares of Vitamins: % Value 2020-2023

Table 79 - Forecast Sales of Vitamins by Category: Value 2023-2028

Table 80 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

## Weight Management and Wellbeing in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The health and wellness trend remains strong despite economic constraints as consumers focus on their physical appearance

Weight concerns grow in importance in the country due to rising obesity rates

Consumers seek natural ingredients when on a weight management plan

### PROSPECTS AND OPPORTUNITIES

The ongoing economic environment hinders growth of weight management and wellbeing

High income earners take an alternative route to weight loss management

Economic constraints enable home remedies to gather momentum at the expense of weight management and wellbeing products over the forecast period

## CATEGORY DATA

Table 81 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 82 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 83 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 84 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 85 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

## Herbal/Traditional Products in South Africa

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Industry players launch more products that contain herbal/traditional ingredients

Consumers increasingly favour consumer health products with familiar ingredients

Herbal/traditional products continue to see an increase in retail value sales despite the tough economic conditions

### PROSPECTS AND OPPORTUNITIES

Affordability remains a key consideration due to ongoing economic constraints over the forecast period

Growth opportunity for private label

A strong focus placed on herbal/traditional products over the forecast period

## CATEGORY DATA

Table 87 - Sales of Herbal/Traditional Products by Category: Value 2018-2023

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

Table 89 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 90 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 91 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

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

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Consumers are brand loyal when it comes to paediatric consumer health  
Paediatric consumer health sales are driven by promotions and discounting strategies  
Paediatric consumer health considered an essential and vital category

### PROSPECTS AND OPPORTUNITIES

Slow demand for paediatric vitamins and dietary supplements due to the rising cost of living over the forecast period  
Increasing potential for more paediatric consumer health categories  
Paediatric consumer health competes directly with herbal/traditional remedies used by lower socioeconomic groups

### CATEGORY DATA

Table 93 - Sales of Paediatric Consumer Health by Category: Value 2018-2023  
Table 94 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023  
Table 95 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023  
Table 96 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023  
Table 97 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028  
Table 98 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2023-2028

## 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/consumer-health-in-south-africa/report](https://www.euromonitor.com/consumer-health-in-south-africa/report).