

# Consumer Health in Bolivia

September 2023

Table of Contents

## Consumer Health in Bolivia

### 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 Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Moderate growth, as normal behaviour resumes post pandemic

Generic analgesics increasingly popular

Segmentation within topical pain relievers

#### PROSPECTS AND OPPORTUNITIES

Softgel capsules gain ground over forecast period

Growing illegal supply of analgesics limits growth

Further segmentation over forecast period

### 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

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

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Moderate current value growth, as seasonal flus return

Pollution and climate change lead to growth in value sales of hay fever remedies

Brand leader Refrianex supported by widespread promotion

#### PROSPECTS AND OPPORTUNITIES

Brands promote natural properties

Innovation in cold remedies as brands aim at more specific target audiences

Consumers increasingly price sensitive over forecast period

#### CATEGORY DATA

Table 17 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

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

Table 19 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 20 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 21 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

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

## Dermatologicals in Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Doctor recommendations supporting volume sales

Product specialisation in fragmented competitive landscape

Humid weather sees surge in fungal conditions

#### PROSPECTS AND OPPORTUNITIES

Hair loss treatments remain niche

Medicated shampoo faces challenges from alternatives and illegal supplies

Vaginal antifungals migrating to Rx formats

#### CATEGORY DATA

Table 23 - Sales of Dermatologicals by Category: Value 2018-2023

Table 24 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 25 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 26 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 27 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 28 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

## Digestive Remedies in Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Proton pump inhibitors impact antacid sales

Severe flooding affects water supplies and leads to high incidence of diarrhoea

Increased socialisation boost demand for digestive remedies

## PROSPECTS AND OPPORTUNITIES

Inadequate sanitary infrastructure sustains volume sales  
Continuing innovation drives growth  
Growing interest in more natural laxative products

## CATEGORY DATA

Table 29 - Sales of Digestive Remedies by Category: Value 2018-2023  
Table 30 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023  
Table 31 - NBO Company Shares of Digestive Remedies: % Value 2019-2023  
Table 32 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023  
Table 33 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028  
Table 34 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

## Wound Care in Bolivia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Wound care continues to be driven by increased activity levels, post pandemic  
3M continues to dominate  
Farmacorp strengthens its private label

## PROSPECTS AND OPPORTUNITIES

Farmacorp offers “value-added” first aid kits  
Illegal supplies dampen volume sales of sticking plasters  
Growth potential for wound dressings

## CATEGORY DATA

Table 35 - Sales of Wound Care by Category: Value 2018-2023  
Table 36 - Sales of Wound Care by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Wound Care: % Value 2019-2023  
Table 38 - LBN Brand Shares of Wound Care: % Value 2020-2023  
Table 39 - Forecast Sales of Wound Care by Category: Value 2023-2028  
Table 40 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in Bolivia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Fall in constant value sales, as rising costs hit profitability  
Presence of illegal supplies dampens volume sales  
Competitors look to stand out from the crowd

## PROSPECTS AND OPPORTUNITIES

Sales remain limited to small higher income consumer niche  
Increasing level of segmentation  
Direct selling dominates distribution due to offering of personalised service

## CATEGORY DATA

Table 41 - Sales of Sports Nutrition by Category: Value 2018-2023  
Table 42 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023  
Table 43 - NBO Company Shares of Sports Nutrition: % Value 2019-2023  
Table 44 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 45 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 46 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation dampens volume demand

Tonics increasingly offer specific functionalities

Dietary supplements highlight natural properties

#### PROSPECTS AND OPPORTUNITIES

Direct sellers continue to lead

Beauty supplements gain value share

Probiotics mainly consumed through dairy products

#### CATEGORY DATA

Table 47 - Sales of Dietary Supplements by Category: Value 2018-2023

Table 48 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 49 - Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 50 - NBO Company Shares of Dietary Supplements: % Value 2019-2023

Table 51 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023

Table 52 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 53 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

## Vitamins in Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The relevance of immune prevention continues to lose momentum

High inventory of vitamin C leads to aggressive price promotions

Vitamins not targeted at prevention of COVID-19 perform better

#### PROSPECTS AND OPPORTUNITIES

Further segmentation in multivitamins

Prevalence of dengue fever boost volume sales of vitamin B

Vitamin E crosses over from beauty to vitamins

#### CATEGORY DATA

Table 54 - Sales of Vitamins by Category: Value 2018-2023

Table 55 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 56 - Sales of Multivitamins by Positioning: % Value 2018-2023

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

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

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

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

## Weight Management and Wellbeing in Bolivia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising inflation dampens volume sales

Herbalife has new structure

Shift in focus from losing weight to being healthy

## PROSPECTS AND OPPORTUNITIES

High prices continue to dampen volume sales

Weight loss supplements disrupted by entry of Satial

Ozempic could lead to sustained long term decline

## CATEGORY DATA

Table 61 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 62 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 64 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 65 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

## Herbal/Traditional Products in Bolivia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Government supporting development of traditional medicine industry

Several herbal/traditional products perform strongly

Iconic traditional decongestant brand Mentisan hit by counterfeits

## PROSPECTS AND OPPORTUNITIES

Increased segmentation over forecast period

Push for legalisation of medical cannabis

Herbal/traditional sleep aids see continued growth

## CATEGORY DATA

Table 67 - Sales of Herbal/Traditional Products: Value 2018-2023

Table 68 - Sales of Herbal/Traditional Products: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 70 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 71 - Forecast Sales of Herbal/Traditional Products: Value 2023-2028

Table 72 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2023-2028

## Paediatric Consumer Health in Bolivia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Fall in current value sales, as birth rate falls

Nappy (diaper) rash treatments most popular product

Double-digit volume decline for paediatric vitamins

## PROSPECTS AND OPPORTUNITIES

Under resourced public health drives growth of OTC products

Increased segmentation within vitamins and dietary supplements

Shift towards natural products over forecast period

## CATEGORY DATA

Table 73 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 74 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 75 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 76 - 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-bolivia/report](http://www.euromonitor.com/consumer-health-in-bolivia/report).