

# Consumer Health in Turkey

October 2023

Table of Contents

## Consumer Health in Turkey

### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rebound in aspirin use in 2023

Demand for topical analgesics rises due to increasing participation in sports

Rx products continue to challenge category development

#### PROSPECTS AND OPPORTUNITIES

Growing trend for herbal alternatives

Demographic trend to have a positive impact on analgesics

Marketing to appeal to the younger population

#### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pressure on sleep patterns supports retail volume growth

Herbal options remain the most popular

Sandoz Ilac leads an otherwise highly fragmented competitive landscape

#### PROSPECTS AND OPPORTUNITIES

No switches are foreseen

Health and wellness alternatives

Pharmacies look to omnichannel approach

#### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

High inflation leads to further price rises

Social media continues to develop as a marketing and sales tool for players

Medicated confectionery benefits from key consumer demand trends and wider availability while paediatric cough/cold remedies gains some traction with the return to out-of-home lifestyles

#### PROSPECTS AND OPPORTUNITIES

Paediatric cough/cold remedies to continue to gain traction

Increasingly health-conscious consumers to shift towards natural products

Pharmacies to remain the go-to channel despite e-commerce development

#### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

New hair loss treatments to cater to growing demand

Focus shifts to beauty and personal appearance as the COVID-19 threat diminishes

New line marks B-Good's expansion into dermatologicals

## PROSPECTS AND OPPORTUNITIES

Demand is set to grow across dermatologicals

Increasingly educated parents to boost the use of child-facing dermatologicals

Digitalisation fosters marketing and communications benefits

## 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 Turkey

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

High stress levels increase the demand for antacids

Increasing demand for probiotics poses a threat to digestive remedies

Bayer Türk Kimya Sanayi ensures dominance of the multinational offer

## PROSPECTS AND OPPORTUNITIES

Positive growth is projected but Rx products remain a threat

Traditional home-made digestive remedies to continue to lose favour

Young adults to become a more important consumer base

## 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 Turkey

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Rx products and healthier lifestyles undermine OTC eye care

No switches limit growth potential

Bausch & Lomb Sağlık Optik Ürünleri dominates the landscape

## PROSPECTS AND OPPORTUNITIES

Increasing presence of sophisticated standard eye care products

Ageing population and lifestyle trends to support the demand for standard eye care

Rx products and vitamins and dietary supplements to remain the main threats

## 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Electronic cigarettes hinder the growth potential of NRT smoking cessation aids

NRT gum benefits from convenience and oral replacement advantages

Multinationals leverage reputation for quality and effectiveness to dominate

#### PROSPECTS AND OPPORTUNITIES

Rx products to continue to pose a strong threat to OTC alternatives

Healthier lifestyle trend to increase the numbers of smokers using NRT smoking cessation aids

Lack of innovation to hinder NRT smoking cessation aids

#### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Focus on fit and healthy lifestyles benefits wound care

New product development adds value to wound care

Greater channel penetration

#### PROSPECTS AND OPPORTUNITIES

Wound care is expected to benefit from the ongoing health kick

Added-value features and advanced products to stimulate demand

Ageing population to support demand for various wound care needs

#### 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 Turkey

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Shift to pure fitness widens the appeal of sports nutrition  
Increasing competition from packaged food  
Consumers focus on basic products

## PROSPECTS AND OPPORTUNITIES

Health kick and convenience to boost the appeal of protein/energy bars  
Promotions to become frequent  
Sustainability and product origin to play growing roles in purchasing decisions

## 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Economy and convenience perceptions pique demand in dietary supplements in 2023  
Stronger call for beauty-positioned dietary supplements  
Brand owners continue to diversify their portfolios

#### PROSPECTS AND OPPORTUNITIES

The demand for dietary supplements is expected to continue to rise  
Rising demand for herbal ingredients to inform offer  
The competitive landscape is set to fragment

#### 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Unstable economy and political instability hinder growth potential  
Healthier diets present a push-pull effect in vitamins  
New brands add dynamism to vitamins

#### PROSPECTS AND OPPORTUNITIES

Strong activity to develop and grow vitamins  
Counterfeit products remain a major threat  
Various formats to ease use and add convenience

## 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The demand for weight management and wellbeing rebounds in 2023 as consumers resume pre-pandemic lifestyles

Rising unit prices underpin dynamic retail current value growth

Simplicity and natural ingredients are key to attracting consumers

### PROSPECTS AND OPPORTUNITIES

Product positioning is expected to benefit weight management and wellbeing

Retail e-commerce to continue to leverage convenience and pricing advantages and offer a discreet way to buy these products

Alternative methods threaten weight management and wellbeing products

## 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 Turkey

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong interest in herbal/traditional products in the slipstream of the health and wellness trend

More consumers seek value for money amid a tough economic climate

New products create interest

### PROSPECTS AND OPPORTUNITIES

Bright outlook in an increasingly health-orientated environment

Consumers look to natural and milder remedies to avoid side effects

The competitive landscape is expected to fragment as new players enter the fray

## 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

## Paediatric Consumer Health in Turkey

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Robust interest in paediatric consumer health  
Natural remedies continue to benefit from a safer image  
Players continue to diversify their portfolios

### PROSPECTS AND OPPORTUNITIES

Demand for paediatric vitamins and dietary supplements to grow  
Trend towards natural products to gain momentum in paediatric dermatologicals  
Players to leverage growing willingness to spend on paediatric consumer health

### 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-turkey/report](http://www.euromonitor.com/consumer-health-in-turkey/report).