

Consumer Health in the Philippines

October 2023

Table of Contents

Consumer Health in the Philippines

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 - Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 - Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 - 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 the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of analgesics supported by spreading consumer awareness

Labelling laws drive innovation as companies seek to compete on ingredients

Selling multiple analgesics as part of a kit becomes increasingly popular

PROSPECTS AND OPPORTUNITIES

Generics set to become increasingly important in analgesics in the Philippines

Return to pre-pandemic lifestyles and daily routines support sales growth in analgesics

Population ageing a major factor underpinning positive growth projections for analgesics

CATEGORY DATA

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

Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023

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

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

Sleep Aids in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Melatonin-based Vicks ZzzQuil Natura Sleep is launched in the Philippines ahead of global rollout

The increasingly stressful lifestyles of local consumers support demand for sleep aids

Consumers become more interested in melatonin during the post-pandemic era

PROSPECTS AND OPPORTUNITIES

Further growth ahead for sleep aids, an underdeveloped OTC category

New product development set to focus on innovative delivery formats

Increasingly intense lifestyles and prominence of BPO to fuel demand for sleep aids

CATEGORY DATA

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

Table 19 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

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

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

Cough, Cold and Allergy (Hay Fever) Remedies in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Active ingredients remain on the frontline of the marketing battle

Local brands remain in the lead due to their familiarity among local consumers

Inclusion of citrus fruits and Vitamin C is commonplace in cough and cold remedies

PROSPECTS AND OPPORTUNITIES

Lack of innovation set to inhibit category growth

Shift towards products with a more natural positioning set to gain ground

Generics expected to gain ground due to the harsh economic situation

CATEGORY DATA

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

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

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

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

Dermatologicals in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Return to pre-pandemic lifestyles boost demand for dermatologicals

Low consumer awareness of hydrocortisone, panthenol and other ingredients

Taboos surrounding common skin complaints contribute to low levels of self-medication

PROSPECTS AND OPPORTUNITIES

High birth rate and baby boom to boost growth in nappy (diaper) rash treatments

E-Commerce to alleviate the embarrassment of consumers

Recovery of travel and tourism to support sales growth in some categories

CATEGORY DATA

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

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

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

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

Digestive Remedies in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smaller, more convenient packs draw the attention of local consumers

International brands face increasing challenges from local rivals

Higher levels of education among local consumers support sales growth

PROSPECTS AND OPPORTUNITIES

Motion sickness remedies to continue benefiting from the return of travel and tourism

Rising health awareness among local consumers to continue supporting sales growth

Emerging lifestyle factors set to continue boosting demand for digestive remedies

CATEGORY DATA

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

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

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

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

Eye Care in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand for eye care supported by increased screen time

New product development remains a major feature of eye care in the Philippines

Shift towards preventative eye care presents challenges and opportunities

PROSPECTS AND OPPORTUNITIES

Shift towards remote working likely to support sales growth in eye care

Prevention better than cure set to emerge as a key theme in eye care

Prevalence of preventable eye conditions set to support sales growth

CATEGORY DATA

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

Table 44 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 46 - LBN Brand Shares of Eye Care: % Value 2020-2023

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

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

NRT Smoking Cessation Aids in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand continues to rise as more Philippine smokers choose to quit

Higher awareness among expatriates drives the development of the category

Pressure to quit smoking continues to mount, supporting sales growth in the category

PROSPECTS AND OPPORTUNITIES

More competition from heated tobacco products and other alternatives to cigarettes

Expansion of product range following the success of Nicorette

Rising tobacco taxes present opportunities for sales growth

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2018-2023

CATEGORY DATA

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

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

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

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

Wound Care in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising interest in keeping a first aid kit at home continues to support sales growth

Return to pre-pandemic daily routines beneficial for wound care sales

Innovation continues to focus on the development of antimicrobial wound care products

PROSPECTS AND OPPORTUNITIES

A favourable scenario and strong basis for wound care to continue developing

Expansion of the core product range presents opportunities for strong sales growth

Innovation set to become more important as competition intensifies

CATEGORY DATA

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

Table 57 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Wound Care: % Value 2020-2023

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

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

Sports Nutrition in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising interest in sports and fitness provides basis for sales of sports nutrition
Health and wellness attributes prove increasingly crucial for supporting demand
E-commerce continues to gain ground consumers demand convenience

PROSPECTS AND OPPORTUNITIES

Expansion of consumer base set to spur sales growth in the category
Increasing pressure to look muscular and slim among young men to prove crucial
Casual rather than committed consumer base could present challenges

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2018-2023
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2019-2023
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

Dietary Supplements in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Probiotic supplements continues to gain ground as gut health comes into focus
Ginseng booms as rising interest in South Korean culture boosts consumer awareness
Various manufacturers are rebranding their ingredients as being positive for heart health

PROSPECTS AND OPPORTUNITIES

Dietary supplements that target eye health to register rapid growth in demand
Probiotics set to continue gaining ground as consumers look to boost overall health
Rising importance of e-commerce in the distribution of dietary supplements

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2018-2023
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2018-2023
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2019-2023
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

Vitamins in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vitamin supplementation increasingly commonplace in the Philippines
Competition intensifies as category players focus more on marketing
Vitamin D gains ground due to its reputation for supporting coverage from illness

PROSPECTS AND OPPORTUNITIES

Immune support to emerge as a key marketing positioning during the post-pandemic era
Vitamin C likely to benefit from rising consumer interest in sodium ascorbate
E-Commerce set to become more important in the expansion of product ranges

CATEGORY DATA

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

Table 76 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 77 - Sales of Multivitamins by Positioning: % Value 2018-2023

Table 78 - NBO Company Shares of Vitamins: % Value 2019-2023

Table 79 - LBN Brand Shares of Vitamins: % Value 2020-2023

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

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

Weight Management and Wellbeing in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

OTC obesity, slimming teas and meal replacement continue to gain ground

New product development and marketing crucial in weight management and wellbeing

Cultural factors motivate Philippine women to maintain a healthy weight

PROSPECTS AND OPPORTUNITIES

Lifestyle factors to continue contributing to positive growth projections

Broader range of products likely to result in an expansion of the consumer base

Popularity of holistic approach to weight loss presents challenges and opportunities

CATEGORY DATA

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

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

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

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

Herbal/Traditional Products in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Herbal/traditional products benefits from focus on complementary medicine

Virgin coconut oil remains a popular choice as consumers favour natural products

Herbal/traditional products increasingly seen as medicinal

PROSPECTS AND OPPORTUNITIES

Emerging products based on traditional remedies set to generate rising sales

Wider consumer trends favourable for a continuation of positive sales growth

Expanding distribution set to make herbal/traditional products more widely available

CATEGORY DATA

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

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

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

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

Paediatric Consumer Health in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovative delivery formats such as drops and syrups remain very common
Natural products to the fore as consumers seek to reduce the potential for harm
Strong demand as parents look to minimise the risk of viral infection

PROSPECTS AND OPPORTUNITIES

Ther wider variety of products on offer set to underpin strong sales growth
Innovation set to be leveraged as category players seek to tap into rising demand
Paediatric probiotic supplements set to gain ground as gut health remains in focus

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 - 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-the-philippines/report.