

Consumer Health in Spain

September 2023

Table of Contents

Consumer Health in Spain

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 2018-2023Table 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Back to normality but demand for analgesics remains above pre-pandemic levels Strain on local economy pushes some consumers to consider reimbursed analgesics to manage tight budgets Increasing popularity of generics in fairly fragmented competitive landscape

PROSPECTS AND OPPORTUNITIES

Economy to continue playing a role in consumers' purchasing decisions Expansion possible with potential for further OTC switches New ingredients to be explored within topical analgesics/anaesthetic

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2018-2023Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023Table 16 - Forecast Sales of Analgesics by Category: Value 2023-2028Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

Sleep Aids in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

High stress levels maintain demand for sleep aids in Spain Economy setting the pace of growth Herbal/traditional sleep aids continue to gain share from standard options

PROSPECTS AND OPPORTUNITIES

Economic framework likely to influence consumers' purchasing decisions over early part of forecast period Ageing population set to support demand for sleep aids Innovation in the form of new ingredients and formats to be increasingly explored

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2018-2023Table 19 - Sales of Sleep Aids: % Value Growth 2018-2023Table 20 - NBO Company Shares of Sleep Aids: % Value 2019-2023Table 21 - LBN Brand Shares of Sleep Aids: % Value 2020-2023Table 22 - Forecast Sales of Sleep Aids: Value 2023-2028Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

Cough, Cold and Allergy (Hay Fever) Remedies in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weaker performance for cough, cold and allergy (hay fever) remedies following surge in 2022 Increasing competition from other categories weighs on demand Herbal/traditional products benefits from preventive health trend

PROSPECTS AND OPPORTUNITIES

Local economy likely to influence demand over early part of the forecast period Allergies in Spain set to gain further ground, supporting demand for associated products Combination products come under the scrutiny of health authorities

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

Dermatologicals in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic factors and supply issues shape demand for dermatologicals COVID-19 has changed the parameters Shift towards naturalness drives up demand for herbal/traditional dermatologicals

PROSPECTS AND OPPORTUNITIES

Weak local economy set to influence consumers' purchasing decisions but outlook is fairly positive for dermatologicals in Spain Changing demographics to influence future demand Further competition from beauty and personal care likely

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Range of factors negatively impacting demand for digestive remedies Rising awareness of gut health supports preventive health trend Stable competitive landscape with limited innovation

PROSPECTS AND OPPORTUNITIES

Weak economy heading into forecast period likely to influence consumer spending Spain's ageing population offers future growth potential Digestive health gaining popularity

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Greater exposure to digital screens supports demand for eye care due to increasing incidence of dry eyes E-commerce gains further ground within eye care as consumers search for more affordable options Some change at the top and new launches add interest to eye care's competitive landscape

PROSPECTS AND OPPORTUNITIES

Socioeconomic factors to influence demand heading into forecast period Popularity of contact lenses to support sales Potential for further segmentation within eye care by age

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2018-2023Table 44 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Eye Care: % Value 2019-2023Table 46 - LBN Brand Shares of Eye Care: % Value 2020-2023Table 47 - Forecast Sales of Eye Care by Category: Value 2023-2028Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

NRT Smoking Cessation Aids in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shrinking consumer base of smokers hinders stronger demand for category Growing competition from RX/reimbursed options Lack of innovation in consolidated competitive landscape

PROSPECTS AND OPPORTUNITIES

Outlook remains bleak for NRT smoking cessation aids due to healthier lifestyles and government support Competition from e-vapour products Products containing herbal/traditional ingredients will proliferate

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic framework shapes sales of wound care Players look to expand through reimbursed wound care and products targeting children Private label continues to make gains in weak economic scenario but innovations emerge

PROSPECTS AND OPPORTUNITIES

While economic pressures matter, the need for essential wound care and ageing population will support sales Greater participation in sporting activities likely to support new launches Futher segmentation within wound care still needed

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Being healthy and losing weight favour recovering demand for sports nutrition E-commerce makes further gains but players understand importance of omnichannel approach to sports nutrition sales Running boom boosts demand and remains relevant in Spain

PROSPECTS AND OPPORTUNITIES

Heightened health awareness set to support further demand for sports nutrition despite weak economy and subdued disposable incomes Sources of innovation as players look to offset competition from other areas Impulse purchases to drive up demand for protein/energy bars

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Beauty from within approach beyond pandemic-related growth drivers Probiotic supplements and women's health source of innovation Dietary supplements remains highly fragmented competitive landscape with smaller players relying on e-commerce for distribution

PROSPECTS AND OPPORTUNITIES

Demand for dietary supplements set to remain solid as part of preventive health trend Further investment by beauty players set to strengthen category's profile Ageing population will be key growth driver 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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite some stabilisation, demand for vitamins remains high as consumers continue to focus on supporting health and immune systems Emerging consumer group for vitamins due to changing dietary requirements in Spain Stable competitive landscape and distribution

PROSPECTS AND OPPORTUNITIES

Preventive health trend to remain relevant despite economic distress Greater education needed to understand specific benefits of multivitamins A greater focus on older consumers in line with ageing population

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 Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic framework hinders stronger performance in 2023 Obesity rates continue rising, supporting further demand for weight loss supplements New references add interest, while Herbalife continues to lose share

PROSPECTS AND OPPORTUNITIES

Economic outlook likely to influence consumers' purchasing decisions, but demand will remain for some products Increasing competition from sports protein products and more holistic approach to weight management Spaniards show significant interest in the "magic" weight loss jab

CATEGORY DATA

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weak economy not a significant threat to category sales as consumers maintain interest in products with a natural positioning Use of CBD continues to attract Spaniards' attention Competitive landscape remains fragmented

PROSPECTS AND OPPORTUNITIES

Solid growth for herbal/traditional products supported by subdued incomes and rising health trend Brands attempt to engage more strongly with doctors to encourage uptake Natural origins to continue dictating new product development

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2018-2023Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

Paediatric Consumer Health in Spain

KEY DATA FINDINGS

2023 DEVELOPMENTS

Spain's declining birth rate continues to shrink category's target audience Novelties emerge in attempt to drive up interest and sales Dalsy remains leading brand of paediatric consumer health in Spain

PROSPECTS AND OPPORTUNITIES

Weak local economy and low birth rate to further drag down category's performance in short term Preventive health trend set to further support demand for paediatric vitamins and dietary supplements Addressing local parents' concerns with new launches and formats

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-spain/report.