EXECUTIVE SUMMARY

Consumer health in 2023: the big picture
2023 key trends
Competitive landscape
Retailing developments
What’s next for consumer health?

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KEY DATA FINDINGS

2023 DEVELOPMENTS

New product innovation fuels growth in topical analgesics
Rise in herbal/traditional options by local manufacturers
Inflationary pressures facilitate switch to generic brands and private labels

PROSPECTS AND OPPORTUNITIES

Analgesics expected to continue on steady growth trajectory
Growth in number of new launches targeting sports-related pain, as well as those with a more convenient application format
Greater adoption of generic analgesics is expected to lower unit prices

CATEGORY DATA

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

2023 DEVELOPMENTS
Consumers in Malaysia maintain appetite for cough, cold and allergy (hay fever) remedies due to sustained interest in illness prevention
Emergence of more innovative formats, such as patches and sprays
Rising competition from immunity-strengthening vitamins and dietary supplements

PROSPECTS AND OPPORTUNITIES
Positive outlook fuelled by return of busier, more sociable lifestyles, with herbal/traditional ingredients continuing as key manufacturer focus
Development of new product for specialised use
Blurring of lines between vitamins and dietary supplements and cough, cold and allergy (hay fever) remedies

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Dermatologicals in Malaysia

2023 DEVELOPMENTS
Mixed performance in 2023, as consumers return to active, outdoor lifestyles
Hair loss treatments hone in on cutting-edge stem cell technology
Rise in sales performance of private label as manufacturers eye opportunity of soaring living cost

PROSPECTS AND OPPORTUNITIES
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Positive outlook for domestic manufacturers
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Digestive Remedies in Malaysia

2023 DEVELOPMENTS
High-stress lifestyles contribute to strong growth in antacids
On-the-go formats accommodate time-pressed consumers
Domestic manufacturers ramp up their investment in digestive remedies

PROSPECTS AND OPPORTUNITIES
Trend towards busier lifestyles projected to spur growth in more convenient formats, including within motion sickness remedies
Rising competition from dietary supplements, as well as kombucha
Increasingly educated consumers to cultivate rising demand for diarrhoeal remedies

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Eye Care in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Demand on eye care is boosted by strong exposure to digital gadgets
Innovative new launches with more advanced claims
New vial packaging format offers consumers a more hygiene option

PROSPECTS AND OPPORTUNITIES
Standard eye care expected to lead growth in eye care, with new product development likely to focus around greater efficacy and the treatment of specific issues
Eye health supplements pose a threat to the growth of eye care
Distribution through offline channels will remain solid, with convenience stores expected to grow in importance

CATEGORY DATA
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NRT Smoking Cessation Aids in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Delay in tabling of smoking ban bill boosts growth for NRT smoking cessation aids
Sales of NRT smoking cessation aids remain largely confined to pharmacies although legislative changes will lead to wider distribution
Competitive landscape remains highly consolidated

PROSPECTS AND OPPORTUNITIES
Demand could potentially spike in the event of approval obtained for the Control of Smoking Products for Public Health Bill 2023
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Wound Care in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Resumption of outdoor activities spurs growth in wound care
Continued diversification in application format of plasters/adhesive bandages
Private label offerings produced by chained pharmacies are more serious competitors to leading brands

PROSPECTS AND OPPORTUNITIES
Wound care looks set to see healthy growth over the forecast period, fuelled by investment in new product development
Pharmacy chain network will continue to expand but convenience stores will also gain traction
Private label offerings look set to make further gains

CATEGORY DATA
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Sports Nutrition in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Continued healthy growth as a result of resumption of sport and fitness activities
Manufacturers seek to differentiate their portfolios through new ingredients
Convenient consumption formats cater to busy on-the-go lifestyles

PROSPECTS AND OPPORTUNITIES
Healthy growth expected, thanks to continued manufacturer innovation
Sports nutrition could face rising competition from other high-protein foods
Distribution likely to see a further shift online

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Dietary Supplements in Malaysia

KEY DATA FINDINGS
2023 DEVELOPMENTS

Immunity remains a key focus in dietary supplements, while eye health and probiotic formulations benefit from return to busier lifestyles
Focus on supplements with a beauty positioning
Evolving product format discovered in dietary supplement results in blurring between food and beverage with health supplements

PROSPECTS AND OPPORTUNITIES

Holistic health approach will be key manufacturer focus
New, advanced ingredients and more convenient formats will drive growth
Online sales and marketing set to expand as competition grows

CATEGORY DATA

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Vitamins in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Single vitamins continue to grow in popularity, with immunity-boosting products seeing high demand
Multivitamins strengthen their appeal
Slower-release immunity-strengthening products remain popular, as preventative health trend persists

PROSPECTS AND OPPORTUNITIES

Multivitamins will target the needs of specific consumer groups in order to become more competitive
New and innovative formats expected to inform new product launches
Private labels anticipated to gain traction as a result of high cost of living

CATEGORY DATA

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Weight Management and Wellbeing in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weight management and wellbeing sees healthy growth as Malaysians seeks convenient solutions to their nutritional needs
Slimming teas face competition from other weight-loss drinks, with more interesting and diversified flavours
International direct sellers adopt localised marketing campaigns to boost consumption

PROSPECTS AND OPPORTUNITIES

Growing levels of health-consciousness will spark aggressive new launches by retailers
Local brands to gain traction
Growing competition from sports nutrition products, which are increasingly marketed with weight management benefits

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**Herbal/Traditional Products in Malaysia**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**
Demand for herbal/traditional products remains strong, with immunity remaining a key focus in tonics
Tiger milk mushroom sees high degree of manufacturer interest
Competitive landscape becomes increasingly fragmented, as new manufacturers emerge with new product launches

**PROSPECTS AND OPPORTUNITIES**
Research and development to focus on herbal/traditional cough remedies
Immunity-strengthening herbal/traditional dietary supplements and tonics are expected to gain greater exposure
Manufacturers set to diversify their product ranges

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**Paediatric Consumer Health in Malaysia**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**
Paediatric vitamins and dietary supplements continue to enjoy solid growth as parents prioritise children's preventative health
Paediatric vitamins and dietary supplements evolve in line with changing lifestyles
Products to support cognitive development gain traction

**PROSPECTS AND OPPORTUNITIES**
Robust growth expected for paediatric vitamins and dietary supplements, with brands sold in bricks-and-mortar retailers leading the way
Strong potential for products that can support academic performance
Expansion of pharmacy network will be key driver of growth, but e-commerce will grow in importance

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