

Consumer Health in Israel

September 2023

Table of Contents

Consumer Health in Israel

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Common colds and viruses drive sales momentum in analgesics

Paediatric ibuprofen grows ahead of acetaminophen

Competitive landscape is concentrated among a few players

PROSPECTS AND OPPORTUNITIES

Retail volume and value growth to moderate in analgesics

Analgesics innovate through further segmentation

Teva Pharmaceuticals Industries to build on its strong consumer loyalty to solidify its lead in 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pandemic influence on sleep aids was strong

Security concerns in Israel drive demand for OTC sleep aids

Melatonin is purchased online from international websites

PROSPECTS AND OPPORTUNITIES

Sleep aids benefit from wider acceptance and usage

Natural alternatives such as melatonin could slow category growth as e-commerce is dominant channel

Neopharm will remain leader in 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Common colds and viruses drive consumption of cough and cold remedies

Local player Teva Pharmaceuticals Industries leads in cough, cold and allergy (hay fever) remedies

Private label holds ground in 2023

PROSPECTS AND OPPORTUNITIES

The new normal will drive steady growth in value sales

Antihistamines may alleviate long COVID-19 symptoms

Teva Pharmaceutical Industries to remain category leader

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Head lice problems resurface as children are back in schools

Increase in antibiotic use drives demand for vaginal antifungals

COVID-19 positively impacts hair loss treatments

PROSPECTS AND OPPORTUNITIES

Nappy (diaper) rash treatments face moderate growth

Perrigo Israel Pharmaceuticals will continue to lead category

Impact of COVID-19 pandemic will fade in upcoming period

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Normalisation of consumer lifestyles boosts digestive remedies

Motion sickness remedies witness strong recovery post-pandemic

Growing competition from natural health remedies

PROSPECTS AND OPPORTUNITIES

GSK Consumer Healthcare to secure its lead in digestive remedies

Famotidine may ease COVID-19 symptoms

E-commerce to gain retail share in 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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Standard eye care sales linked to heavy screen usage

Allergy eye care enjoys robust recovery

Lapidot Medical Import and Marketing maintains lead in eye care

PROSPECTS AND OPPORTUNITIES

Positive outlook during forecast period

Standard eye care will be high in demand to combat dry eyes

Natural positioning will be important to consumers

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady growth for NRT smoking cessation driven by pursuit of healthier lifestyles

Increased taxes on vaping products pushes consumers towards NRT smoking cessation aids

Competitive threat from prescribed drug Varenicline

PROSPECTS AND OPPORTUNITIES

Health and wellness trend to drive sales momentum

Nicotinell to remain category brand leader

Alternative smoking cessation provide some competition

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Wound care category enjoys strong performance

Private label secures a bigger foothold in wound care

Gauze, tape and other wound care lead category

PROSPECTS AND OPPORTUNITIES

Chemipal to remain leader despite challenges from private label

Health and fitness regimes to boost wound care

Steady demand in sticking plasters/adhesive bandages

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Gym attendance drives demand for sports nutrition
Well-known local brands attempt to capitalise on high growth sports nutrition category
Sports protein products gain popularity as part of broader protein trend

PROSPECTS AND OPPORTUNITIES

Sports nutrition likely to maintain moderate growth rates
Flurry of new launches expected as brands capitalise on protein trend
Growing competition from e-commerce retailers

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heavier focus on health and wellness underpins sales of dietary supplements
Echinacea is sought out for immune support
Growing awareness of probiotic supplements and its health benefits drives category sales

PROSPECTS AND OPPORTUNITIES

Slower growth ahead but consumers more demanding
International e-commerce players could stifle growth potential
Pharmacies will remain the leading channel

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher levels of health-awareness drives vitamins consumption
Vitamin D growth stabilises following surge during pandemic
Supherb launches new vitamin format

PROSPECTS AND OPPORTUNITIES

Healthy value growth, supported by heightened consumer health awareness
Paediatric vitamins & dietary supplements is area of growth
Ta'am Teva Altman to retain leadership position

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and wellness trend negatively impacts category

Herbalife International leads in weight management and wellbeing

Supplement nutrition drinks bucks the negative trend

PROSPECTS AND OPPORTUNITIES

Shifting consumer preferences towards healthier eating creates challenges

E-commerce continues to grow at healthy pace

Slimming teas loose further ground

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Holistic approach to health drives category sales

Herbal sleep aids enjoy strong growth

Paediatric products are a popular option with parents

PROSPECTS AND OPPORTUNITIES

Ta'am Teva Altman to retain leadership position

Herbal/traditional cough, cold and allergy (hay fever) to see category stabilise at higher level

Price inflation may stifle demand for herbal/traditional products

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 Israel

KEY DATA FINDINGS

2023 DEVELOPMENTS

Paediatric consumer health enjoys solid performance

Parents continue to invest in paediatric vitamins and dietary supplements

Natural remedies are of greater interest to parents

PROSPECTS AND OPPORTUNITIES

Slowdown expected in paediatric consumer health

Nappy (diaper) rash treatments to benefit from high birth rate

Acetaminophen to remain the most popular analgesic

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-israel/report.