Consumer Health in Kenya

EXECUTIVE SUMMARY

Consumer health in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for consumer health?

MARKET INDICATORS

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MARKET DATA

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Vitamins and dietary supplements registration and classification
Self-medication/self-care and preventive medicine
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DISCLAIMER

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Analgesics in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS

Slight fall in constant value sales in 2022
GSK Consumer Healthcare continues to lead and drives innovation
Warning issued regarding diclofenac

PROSPECTS AND OPPORTUNITIES.

Moderate constant value growth over forecast period
Ageing population supports volume sales
Chemists and pharmacies remain largest channel

CATEGORY DATA

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#### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

- Fall in constant value sales in 2022
- GSK Consumer Healthcare continues to lead
- Combination products with added natural ingredients increasingly popular

#### PROSPECTS AND OPPORTUNITIES

- Muted constant value growth over forecast period
- Product innovations set to boost sales over the forecast period – with a focus on naturally-positioned variants
- Climate change leads to higher incidence of allergies

#### CATEGORY DATA

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### Dermatologicals in Kenya

#### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

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- Local companies have sizeable value share
- Dermatologicals with a focus on beauty are seeing value growth

#### PROSPECTS AND OPPORTUNITIES

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- Increasingly consumers look for more natural solutions

#### CATEGORY DATA

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### Digestive Remedies in Kenya

#### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

- Slight fall in constant value sales in 2022
- Value sales remain resilient in 2022
- GSK Consumer Healthcare continues to lead
PROSPECTS AND OPPORTUNITIES

Healthier lifestyles dampen volume sales
Ageing population will drive growth for digestive remedies
Strong marketing and affordable pricing key to maintaining sales over forecast period

CATEGORY DATA

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Wound Care in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS
Small volume sales increase in 2022
Longstanding Ray Pharmaceutica and Beiersdorf maintain their top places, with low levels of competition in a small product area
Pricing main driver of value sales

PROSPECTS AND OPPORTUNITIES
Healthy growth over forecast period
Higher and lower income consumers will be catered for over forecast period
Increasingly active lifestyles will help maintain steady growth in wound care over the forecast period

CATEGORY DATA

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Sports Nutrition in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS
Slight fall in constant value sales in 2022
International players dominate in small and specialised product area
Sports nutrition mainly reaches a specialist consumer base

PROSPECTS AND OPPORTUNITIES
Expansion of consumer base drives volume growth
Changes in distribution over forecast period
Increased number of vegans influence product development

CATEGORY DATA

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Dietary Supplements in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS

Poor performance from dietary supplements in 2022
Competitive landscape continues to be consolidated
E-commerce a growing channel

PROSPECTS AND OPPORTUNITIES

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CATEGORY DATA

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Vitamins in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS

Vitamins best performing consumer health product in 2022
No change in status quo in 2022
Vitamin C star performer

PROSPECTS AND OPPORTUNITIES

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High prices could dampen volume sales
E-commerce a growing channel

CATEGORY DATA

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Weight Management and Wellbeing in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS

Constant value sales unchanged in 2022
Weight loss supplements account for most value sales
Change in focus from weight loss to healthier living

PROSPECTS AND OPPORTUNITIES
Muted constant value growth over forecast period
E-commerce gains value share
Healthier diets and lifestyles will lead to a lower demand for slimming aids

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Herbal/Traditional Products in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS
Slight fall in constant value sales in 2022
No change in status quo
Increasing costs of medical care and pharmaceutical medicines inspire consumers to seek more affordable, alternative remedies

PROSPECTS AND OPPORTUNITIES
Muted performance over forecast period
Price pressure reshapes competitive environment
Ongoing product innovation will support ongoing growth

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Paediatric Consumer Health in Kenya

KEY DATA FINDINGS

2022 DEVELOPMENTS
Slight fall in constant value sales in 2022
Leading players benefit from high levels of consumer trust
Vitamins and dietary supplements see continued value sales

PROSPECTS AND OPPORTUNITIES
Muted growth over forecast period
Shift towards natural products over forecast period
Players focus on child-friendly design

CATEGORY DATA
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