Consumer Health in Thailand

October 2022

Table of Contents
EXECUTIVE SUMMARY
Consumer health in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for consumer health?

MARKET INDICATORS
Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2017-2022
Table 2 - Life Expectancy at Birth 2017-2022

MARKET DATA
Table 3 - Sales of Consumer Health by Category: Value 2017-2022
Table 4 - Sales of Consumer Health by Category: % Value Growth 2017-2022
Table 5 - NBO Company Shares of Consumer Health: % Value 2018-2022
Table 6 - LBN Brand Shares of Consumer Health: % Value 2019-2022
Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2017-2022
Table 8 - Distribution of Consumer Health by Format: % Value 2017-2022
Table 9 - Distribution of Consumer Health by Format and Category: % Value 2022
Table 10 - Forecast Sales of Consumer Health by Category: Value 2022-2027
Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2022-2027

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 Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Acetaminophen shows dynamic growth with wide usage among adults and children
Easing of COVID-19 measures benefits topical analgesics/anaesthetic
Players look for new ways to attract and retain consumer interest

PROSPECTS AND OPPORTUNITIES
Self-medication to become norm
Key categories set for a positive outlook
Store-based retailers set to maintain dominance but the online world offers opportunities

CATEGORY DATA
Table 12 - Sales of Analgesics by Category: Value 2017-2022
Table 13 - Sales of Analgesics by Category: % Value Growth 2017-2022
Table 14 - NBO Company Shares of Analgesics: % Value 2018-2022
Sleep Aids in Thailand

2022 DEVELOPMENTS

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

KEY DATA FINDINGS

2022 DEVELOPMENTS

Players invest in new product development as competition heats up
Return to outdoor activities boosting demand for cough, cold and allergy (hay fever) remedies
Return of tourism boosts sales

PROSPECTS AND OPPORTUNITIES

Sales set to benefit from increase in self-medication
New product development remains rife as players battle for share
Digital marketing strategies seen as important as consumers spend more time online

CATEGORY DATA

Table 18 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2017-2022
Table 19 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2017-2022
Table 20 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2018-2022
Table 21 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2022
Table 22 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2022-2027
Table 23 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2022-2027

Dermatologicals in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of topical germicidals/antiseptics thriving as monkey pox presents a new health concern for consumers
Ageing population and the easing of Thailand’s COVID-19 measures positively impacts sales
Recommendations by pharmacists remain important

PROSPECTS AND OPPORTUNITIES

Dermatological issues likely to remain commonplace with widespread self-medication set to boost sales
A return to more active lifestyles should boost demand
Blurring boundary between consumer health and beauty and personal care products

CATEGORY DATA

Table 24 - Sales of Dermatologicals by Category: Value 2017-2022
Table 25 - Sales of Dermatologicals by Category: % Value Growth 2017-2022
Table 26 - NBO Company Shares of Dermatologicals: % Value 2018-2022
Table 27 - LBN Brand Shares of Dermatologicals: % Value 2019-2022
Table 28 - LBN Brand Shares of Hair Loss Treatments: % Value 2019-2022
Table 29 - Forecast Sales of Dermatologicals by Category: Value 2022-2027
Table 30 - Forecast Sales of Dermatologicals by Category: % Value Growth 2022-2027

Digestive Remedies in Thailand
KEY DATA FINDINGS

2022 DEVELOPMENTS
A return to more busy and stressful lifestyles and unhealthy eating habits feeding demand for digestive remedies. Increased travel benefiting sales while pharmacies remain the dominant distribution channel. Competition remains fierce with players investing in marketing and new product development in an effort to stay ahead.

PROSPECTS AND OPPORTUNITIES
As consumers lead healthier lifestyles this could limit demand for digestive remedies. Return to busy, stressful lifestyles should increase demand for digestive remedies. Antacids expected to remain a firm favourite for providing fast and effective relief.

CATEGORY DATA
- Table 31 - Sales of Digestive Remedies by Category: Value 2017-2022
- Table 32 - Sales of Digestive Remedies by Category: % Value Growth 2017-2022
- Table 33 - NBO Company Shares of Digestive Remedies: % Value 2018-2022
- Table 34 - LBN Brand Shares of Digestive Remedies: % Value 2019-2022
- Table 35 - Forecast Sales of Digestive Remedies by Category: Value 2022-2027
- Table 36 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2022-2027

Eye Care in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Digitalisation and the increased use of contact lenses key growth drivers in 2022. Rising pollution levels and the easing of restrictions boosts demand for eye care. Local players still dominate.

PROSPECTS AND OPPORTUNITIES
Convenience is of growing importance to consumers. New product development likely to fuel growth. Eating supplements maybe in the cards for Thai consumers.

CATEGORY DATA
- Table 37 - Sales of Eye Care by Category: Value 2017-2022
- Table 38 - Sales of Eye Care by Category: % Value Growth 2017-2022
- Table 39 - NBO Company Shares of Eye Care: % Value 2018-2022
- Table 40 - LBN Brand Shares of Eye Care: % Value 2019-2022
- Table 41 - Forecast Sales of Eye Care by Category: Value 2022-2027
- Table 42 - Forecast Sales of Eye Care by Category: % Value Growth 2022-2027

NRT Smoking Cessation Aids in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return of social activities may reduce demand. No new product developments. Retailers look for innovative ways to promote consumption of NRT smoking cessation aids.

PROSPECTS AND OPPORTUNITIES
Demand likely to be affected by a myriad of factors. Smoking continues to be discouraged. Alternative developments would arise in the future.
CATEGORIES INDICATORS
Table 43 - Number of Smokers by Gender 2017-2022

CATEGORIES DATA
Table 44 - Sales of NRT Smoking Cessation Aids by Category: Value 2017-2022
Table 45 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2017-2022
Table 46 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2018-2022
Table 47 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2019-2022
Table 48 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2022-2027
Table 49 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2022-2027

Wound Care in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Wound care benefits from easing of COVID-19 restrictions
Wound care set to see stronger growth as consumers resume more active lifestyles
Companies invest in CSR efforts and marketing to help promote wound care

PROSPECTS AND OPPORTUNITIES
Stocking up of wound care to continue
Offline sales likely to dominate while players will focus on offering more variety to win share
Price could become increasingly important if incomes become stretched

CATEGORIES DATA
Table 50 - Sales of Wound Care by Category: Value 2017-2022
Table 51 - Sales of Wound Care by Category: % Value Growth 2017-2022
Table 52 - NBO Company Shares of Wound Care: % Value 2018-2022
Table 53 - LBN Brand Shares of Wound Care: % Value 2019-2022
Table 54 - Forecast Sales of Wound Care by Category: Value 2022-2027
Table 55 - Forecast Sales of Wound Care by Category: % Value Growth 2022-2027

Sports Nutrition in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return of sport and exercise activities supports a return to growth, with social media platforms also helping to drive interest in sports nutrition
New product developments help fuel interest and demand with products tailored to the needs of different consumers
Increasing reliance on social media and e-commerce to promote and sell products

PROSPECTS AND OPPORTUNITIES
Burgeoning health and fitness trend bodes well for sports nutrition
Product innovations to continue as players eye expansion opportunities
Sports nutrition likely to face stiff competition from high-protein packaged food and beverages

CATEGORIES DATA
Table 56 - Sales of Sports Nutrition by Category: Value 2017-2022
Table 57 - Sales of Sports Nutrition by Category: % Value Growth 2017-2022
Table 58 - NBO Company Shares of Sports Nutrition: % Value 2018-2022
Table 59 - LBN Brand Shares of Sports Nutrition: % Value 2019-2022
Table 60 - Forecast Sales of Sports Nutrition by Category: Value 2022-2027
Table 61 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2022-2027
Dietary Supplements in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demand driven by efforts to boost immunity
Beauty from within
Increased focus on probiotics

PROSPECTS AND OPPORTUNITIES

Demand set to continue growing as consumers take a more holistic approach to their health
The increasingly sophisticated demand of Thai consumers is expected to shape the category
E-commerce and direct selling set to play a bigger role in dietary supplements

CATEGORY DATA

Table 62 - Sales of Dietary Supplements by Category: Value 2017-2022
Table 63 - Sales of Dietary Supplements by Category: % Value Growth 2017-2022
Table 64 - Sales of Dietary Supplements by Positioning: % Value 2017-2022
Table 65 - NBO Company Shares of Dietary Supplements: % Value 2018-2022
Table 66 - LBN Brand Shares of Dietary Supplements: % Value 2019-2022
Table 67 - Forecast Sales of Dietary Supplements by Category: Value 2022-2027
Table 68 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2022-2027

Vitamins in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Vitamins continues to benefit from preventative approach to health with online sales thriving
Intense competition in the category driving omnichannel strategies
New product launches key to growth

PROSPECTS AND OPPORTUNITIES

Product positioning to be the factor that differentiates between companies
More investment expected in digital sales and marketing
Players likely to look for new ways to stand out in the market

CATEGORY DATA

Table 69 - Sales of Vitamins by Category: Value 2017-2022
Table 70 - Sales of Vitamins by Category: % Value Growth 2017-2022
Table 71 - Sales of Multivitamins by Positioning: % Value 2017-2022
Table 72 - NBO Company Shares of Vitamins: % Value 2018-2022
Table 73 - LBN Brand Shares of Vitamins: % Value 2019-2022
Table 74 - Forecast Sales of Vitamins by Category: Value 2022-2027
Table 75 - Forecast Sales of Vitamins by Category: % Value Growth 2022-2027

Weight Management and Wellbeing in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers looking for products to help them lose their pandemic weight gain
Supplement nutrition drinks targeting an expanding audience of consumers
Direct sellers remain key to sales of weight management and wellbeing
PROSPECTS AND OPPORTUNITIES

Aging population to influence demand
Hectic lifestyles encourage consumption
Competition expected to intensify as new players continue to enter the market

CATEGORY DATA

Table 76 - Sales of Weight Management and Wellbeing by Category: Value 2017-2022
Table 77 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2017-2022
Table 78 - NBO Company Shares of Weight Management and Wellbeing: % Value 2018-2022
Table 79 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2019-2022
Table 80 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2022-2027
Table 81 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2022-2027

Herbal/Traditional Products in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
Legalisation of hemp and CBD related products leads to the expansion of the category
Herbal natural ingredients is perceived to be safer
Brand’s Suntory remains the clear leader with the company continuing to invest in new product development and marketing

PROSPECTS AND OPPORTUNITIES
More products from CBD and Hemp to be available in the market
Healthy food and beverage may affect demand
Thai government looks set to play a big role in promoting the use of local herbal/traditional products

CATEGORY DATA
Table 82 - Sales of Herbal/Traditional Products by Category: Value 2017-2022
Table 83 - Sales of Herbal/Traditional Products by Category: % Value Growth 2017-2022
Table 84 - NBO Company Shares of Herbal/Traditional Products: % Value 2018-2022
Table 85 - LBN Brand Shares of Herbal/Traditional Products: % Value 2019-2022
Table 86 - Forecast Sales of Herbal/Traditional Products by Category: Value 2022-2027
Table 87 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2022-2027

Paediatric Consumer Health in Thailand

KEY DATA FINDINGS

2022 DEVELOPMENTS
As demand grows the competitive landscape becomes increasingly fragmented
Increased focus on healthy eating could limit demand for some paediatric consumer health products
Herbal natural ingredients remain popular

PROSPECTS AND OPPORTUNITIES
Parents likely to maintain interest in paediatric vitamins and dietary supplements
Local companies expected to expand their presence
Growth will likely be affected by declining birth rate but growing education and awareness should help to offset this

CATEGORY DATA
Table 88 - Sales of Paediatric Consumer Health by Category: Value 2017-2022
Table 89 - Sales of Paediatric Consumer Health by Category: % Value Growth 2017-2022
Table 90 - Sales of Paediatric Vitamins and Dietary Supplements by Type: % Value 2017-2022
Table 91 - NBO Company Shares of Paediatric Consumer Health: % Value 2018-2022
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, focusing 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-thailand/report](http://www.euromonitor.com/consumer-health-in-thailand/report).