Euromonitor International

Consumer Health in New Zealand

November 2025

Table of Contents

Consumer Health in New Zealand

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture
Key trends in 2025
Competitive landscape
Channel developments
What next for Consumer Health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025
Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025
Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025
Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025
Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025
Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025
Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025
Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025
Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030
Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

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 New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing recognition of chronic pain drives analgesics sales in New Zealand
Leading analgesics players leverage promotional efforts and sports sponsorship investments to build brand awareness locally
Supermarkets and pharmacies continue to shape retail channel dynamics

PROSPECTS AND OPPORTUNITIES

Sales likely to be driven by topical analgesics/anaesthetic and adult acetaminophen despite Trump’s autism claims
Digital tools offer tech-based solutions for chronic pain management through tracking and cognitive behavioural therapy
Paracetamol scheduling under review amid Australian regulatory changes and rising safety concerns

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025
Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025
Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025
Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030
Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sleep aids sales rise in response to sleep trends and growing mental health concerns
Local player continues to dominate otherwise fragmented competitive landscape within sleep aids in 2025
Pharmacies remains primary distribution channel, with discount pharmacy chains offering value-driven pricing

PROSPECTS AND OPPORTUNITIES

Sleep aids anticipated to face further economic headwinds and rising competition from aligned wellness categories as consumers seek all-in-one stress solutions
Reclassification of melatonin as OTC opens new growth pathways for sleep aids
Local traditional remedies repositioned as novel ingredients hold potential to reshape sleep aids

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025
Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025
Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025
Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025
Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030
Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Combination products drive steady growth in 2025 as pseudoephedrine-containing products are back on pharmacy shelves
International players lead as regulatory shifts shake up brand dynamics within cough and cold remedies
Supermarkets leads distribution in 2025, with pharmacies set to leverage improved access to previously restricted medicines following regulatory changes

PROSPECTS AND OPPORTUNITIES

Modest growth likely over the forecast period amid prospect of further regulatory and legal review
Government funding of Fexaclear has potential to reshape systemic antihistamine market
Cost-of-living pressures likely to drive cross-category competition and encourage consumer shift towards affordable alternatives and preventative health and wellness

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025
Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025
Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025
Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025
Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030
Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Hair loss treatments drives dermatologicals, thanks to stress, early-onset concerns and broader consumer uptake
Multinational dominance and strategic brand shifts seen in 2025
Pharmacies retains lead, with mergers and acquisitions in Australia set to shake-up the channel in New Zealand

PROSPECTS AND OPPORTUNITIES

Ageing population, stress-linked conditions and shifting consumer preferences to drive growth within dermatologicals over the forecast period
Local innovation within antiparasitics/lice (head and body) treatment boasts biofluorescence breakthrough
Declining birth rates reshape demand for nappy (diaper) rash treatments in New?Zealand

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025
Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025
Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025
Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025
Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025
Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030
Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Digestive remedies proves resilient amid poor dietary habits and rising demand for gut health support
Multinational companies lead a loyalty-driven landscape, with brand consolidation most evident in more niche segments
Supermarkets maintains its noteworthy distribution lead for digestive remedies sales in 2025

PROSPECTS AND OPPORTUNITIES

Digestive remedies faces struggles amid price pressure and food-led wellness trends
Gut health awareness and interest in probiotics is revealed to be high among NZ netizens according to global study by Italian university
GLP-1 medications likely to impact digestive health innovation in New Zealand

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025
Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025
Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025
Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025
Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030
Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Eye Care in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Age-related conditions, digital strain and increased prevalence of allergens drive growth for eye care in 2025
Care Pharmaceuticals' Clear Eyes maintains brand leadership through format innovation and broad consumer appeal
Pharmacies leads distribution for eye care in 2025

PROSPECTS AND OPPORTUNITIES

Rising trend of digital lifestyles should drive strong performance for forecast period
University of Auckland castor oil trial could unlock new opportunities for natural dry-eye therapies in New Zealand
Local and global CSR efforts focus on advancing First Nations eye health and enhancing sustainability within eye care

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025
Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025
Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025
Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025
Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030
Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

NRT Smoking Cessation Aids in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising public health awareness and tobacco control measures drive sales amid shifting consumption trends
International players retain leadership and drive competitive dynamics
Pharmacies dominates distribution in 2025 thanks to regulatory status, brand equity and affordability of subsidised access

PROSPECTS AND OPPORTUNITIES

Shifting policy and competition from alternative formats likely to reshape outlook for NRT smoking cessation aids over the forecast period
New Zealand moves to sustainably tackle digital waste by banning the manufacture, sale, supply and distribution of single-use vape technology
Regulatory divergence likely to remain key in New Zealand's harm reduction approach to heated tobacco vs. nicotine pouches

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2020-2025

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025
Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025
Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025
Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025
Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030
Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

Wound Care in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Wound care sees value and volume sales rise in 2025 thanks to active lifestyles and ageing population
Multinational brands hold steady in wound care in New Zealand, as Elastoplast rolls out global Second Skin Protection locally
Steady demand, extensive ranging and discount strategies ensure distribution lead for pharmacies

PROSPECTS AND OPPORTUNITIES

Wound care sales set to rise as consumers seek value and functionality
Elastoplast strengthens brand visibility and emotional resonance among local consumers through rugby union and rugby league sponsorship
Eco-friendly sticking plasters/adhesive bandages gain traction in New Zealand amid rising health and environmental concerns

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2020-2025
Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025
Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025
Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025
Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030
Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports non-protein products drives growth in 2025
Vitaco leads, with Naturalac and Glanbia among key competitors
Supermarkets leads sales as omnichannel retail and bulk formats drive strong performance within retail e-commerce

PROSPECTS AND OPPORTUNITIES

Future growth will be driven by wellness trends and demand for functional snacking
Sports nutrition in New Zealand balances local dairy strengths with rising demand for sustainable sports protein alternatives
Marine-based innovation positions New Zealand at the forefront of sustainable sports protein development

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Probiotic supplements and combination supplements lead growth in 2025
Competitive landscape characterised by product innovation
Rising interest in gut health prompts innovative 60-day health journey format

PROSPECTS AND OPPORTUNITIES

Dietary supplements set for growth amid evolving consumer trends and pending regulatory reform
New Zealand researchers propose grading system to aid use of probiotics for mental health
Scientific substantiation and regulatory alignment to continue to drive credible innovation

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising health awareness drives value growth despite subdued consumer confidence
A mix of multinational, regional and local companies characterises the competitive landscape in 2025
Pharmacies and retail e-commerce continue to outperform supermarkets and direct selling

PROSPECTS AND OPPORTUNITIES

Innovation, personalisation and format diversification to drive steady growth throughout forecast period
Reports of B6 toxicity concerns among Australian regulators prompt growing awareness over safety and supplement labelling in New Zealand
New Zealand government and industry stakeholders consult on standalone bill to modernise regulation of natural health products following repeal of the TPA

CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2020-2025
Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025
Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025
Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025
Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025
Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030
Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Prevalence of obesity and an ageing population shape development in 2025
Evolving consumer needs create category overlap as wellbeing boundaries blur between sports nutrition and weight management
Personalised advice and immediate accessibility contribute to consumer preference for physical retail and direct sales channels

PROSPECTS AND OPPORTUNITIES

Lifestyle-led alternatives to further challenge traditional weight loss formats over the forecast period
GLP-1 approvals could reshape New Zealand’s weight management landscape
Opportunity for established players as social media scams undermine trust in novel treatments and their medical endorsements

CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025
Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025
Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025
Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025
Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030
Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Multifunctional formats, natural trend and traditional ingredients drive overall growth
Brand leadership and strategic shifts influence herbal/traditional products landscape
Pharmacies channel leads distribution of dietary supplements, while supermarkets support sales of medicated confectionery

PROSPECTS AND OPPORTUNITIES

Natural positioning and sustainability to remain key growth drivers
Traditional products poised to shape innovation in natural health through cultural knowledge and therapeutic research
New Zealand to develop standalone bill that will impact herbal/traditional products following repeal of Therapeutic Products Act

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025
Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025
Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025
Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030
Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

Paediatric Consumer Health in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Preventative care supports sales in paediatric consumer health despite economic pressures
Regional and multinational players shape competitive landscape
Pharmacies and retail e-commerce strengthen as shoppers seek trusted, personalised retail experiences

PROSPECTS AND OPPORTUNITIES

Growth set to continue despite demographic contraction and pressure on margins
Sigma-Chemist Warehouse merger will intensify pharmacy channel dominance, with likely implications for access, pricing and brand visibility
Rising concern over paediatric gummies could undermine trust parental trust over the forecast period

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025
Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025
Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025
Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025
Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030
Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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-new-zealand/report.