Consumer Health in India

EXECUTIVE SUMMARY

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

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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 India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pain concerns amongst Millennials elevate growth for analgesics
Physical activity drives growth for topical analgesics amongst younger consumers
Government implements measures to curb counterfeit products

PROSPECTS AND OPPORTUNITIES

Increasingly hectic lifestyles to drive growth in the forecast period
Ayurvedic claim to rise in topical analgesics/anaesthetic
Wide availability of analgesics online will fuel growth

CATEGORY DATA

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

KEY DATA FINDINGS

2023 DEVELOPMENTS
Continued growth in 2023, driven by decongestants
Unseasonal rains increase instances of coughs and colds
Procter & Gamble’s Vicks continues to lead with its extensive distribution

PROSPECTS AND OPPORTUNITIES
Natural/Ayurvedic products to gain momentum in the forecast period
Environmental problems will elevate respiratory issues
Increasing scrutiny of cough remedies might require reformulation

CATEGORY DATA

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Dermatologicals in India

KEY DATA FINDINGS

2023 DEVELOPMENTS
Topical germicidals/antiseptics drives growth
Category leader Emami focuses on the D2C approach
The reliability of professionals for solving skin problems is a challenge

PROSPECTS AND OPPORTUNITIES
Growth expected to stabilise due to maturity of dermatologicals
Strategic pack sizes will help counter inflation
While store-based retail remains dominant, the ascent of e-commerce continues

CATEGORY DATA

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Digestive Remedies in India

KEY DATA FINDINGS

2023 DEVELOPMENTS
Higher instances of eating restaurant food support growth
GSK Consumer Healthcare maintains its lead, followed by Dabur
Reduced sugar product claims and new product innovations drive growth
PROSPECTS AND OPPORTUNITIES

Competition from home remedies will continue to be a concern
E-commerce penetration set to rise, but at a slower pace
Increasing adoption of probiotics might hamper growth

CATEGORY DATA

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Eye Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising incidences of dry eyes drive moderate growth for eye care
Increasing digital entertainment options drive the need for eye care solutions
Major players are focusing on formats tailored for modern lifestyles

PROSPECTS AND OPPORTUNITIES

Increasing uptake of contact lenses likely to benefit eye care
Increasing demand for blue light protection eyewear could offer stiff competition
Inflationary pressure might affect the category in the forecast period

CATEGORY DATA

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NRT Smoking Cessation Aids in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing health awareness dictates the growth of the category
Cipla remains the dominant player thanks to its trusted name and wide resources
Restricted OTC nicotine dosage limits consumer reach

PROSPECTS AND OPPORTUNITIES

Category to benefit from increasing taxes on cigarettes in India
Wide distribution of NRT smoking cessation aids set to drive growth
Alternatives to help quit smoking might act as competition to the category

CATEGORY INDICATORS

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CATEGORY DATA

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Wound Care in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Maturity of wound care prevents dynamic growth
Transparent adhesive bandages are relatively new to the category
Focus on scalability drives volume growth

PROSPECTS AND OPPORTUNITIES

Increasing popularity of sports will contribute to growth
Diverse online platforms to build the e-commerce presence of wound care
Low margins will continue to be a challenge for brands

CATEGORY DATA

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Sports Nutrition in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising popularity of sports and fitness fuel demand for sports nutrition
E-commerce growth helps drive growth in sports nutrition
Brand collaborations aim to enhance consumer reach

PROSPECTS AND OPPORTUNITIES

Increasing “vegetarian” and “no added sugar” claims for sports nutrition
Government support for sports and fitness will boost awareness
Brands will continue to limit counterfeit products to retain consumer trust

CATEGORY DATA

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Dietary Supplements in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers are bridging nutritional gaps with dietary supplements
General health-focused dietary supplements dominate
Brands are making efforts to expand their reach amongst younger consumers

PROSPECTS AND OPPORTUNITIES
Wide total addressable market likely to benefit growth of the category
Promising future to attract fmcg companies to explore the space
Counterfeit products remain a challenge for the industry

CATEGORY DATA
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Vitamins in India

KEY DATA FINDINGS

2023 DEVELOPMENTS
Vitamins continues to record a stable performance
Availability of new formats for vitamins creates interest
Convenience and cost-effectiveness drive the popularity of multivitamins

PROSPECTS AND OPPORTUNITIES
The changing economic landscape, coupled with growing preventive care, to support forecast growth
E-commerce to become an important channel for growth
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CATEGORY DATA
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Weight Management and Wellbeing in India

KEY DATA FINDINGS

2023 DEVELOPMENTS
Double-digit value growth as consumers seek assistance for weight loss
Herbalife strengthens its share in weight management
Meal replacement thriving within weight management and wellbeing

PROSPECTS AND OPPORTUNITIES
The health and wellness trend will drive growth in the forecast period
Dieticians and nutritionists likely to influence purchasing decisions
Antioxidant claims rising for weight management products

CATEGORY DATA
Herbal/Traditional Products in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Herbal/traditional dietary supplements displays double-digit value growth
Seasonality plays a significant role in herbal/traditional cough, cold and allergy remedies
Dabur retains its lead with a focus on innovation, followed closely by Emami

PROSPECTS AND OPPORTUNITIES

Threat to herbal/traditional products from traditional home remedies
Elevated consumer awareness of the need to maintain a healthy lifestyle will benefit the category
Competition from non-herbal products due to faster relief claims

CATEGORY DATA

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Paediatric Consumer Health in India

KEY DATA FINDINGS

2023 DEVELOPMENTS

Parents’ concern about their children’s nutrition fuels demand
Expanding product reach beyond urban areas is still a challenge
Return of mobility drives growth for nappy (diaper) rash treatments

PROSPECTS AND OPPORTUNITIES

Natural claims offer high potential for paediatric vitamins and dietary supplements
Novel supplement formats likely to see increased adoption
With positive outlook, companies launch products and offer different features

CATEGORY DATA

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