

# **Consumer Health in Denmark**

September 2024

Table of Contents

# Consumer Health in Denmark

# EXECUTIVE SUMMARY

Consumer health in 2024: The big picture 2024 key trends Competitive landscape Retailing developments What next for consumer health?

## MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2019-2024Table 2 - Life Expectancy at Birth 2019-2024

### MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2019-2024Table 4 - Sales of Consumer Health by Category: % Value Growth 2019-2024Table 5 - NBO Company Shares of Consumer Health: % Value 2020-2024Table 6 - LBN Brand Shares of Consumer Health: % Value 2021-2024Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2019-2024Table 8 - Distribution of Consumer Health by Format: % Value 2019-2024Table 9 - Distribution of Consumer Health by Format and Category: % Value 2024Table 10 - Forecast Sales of Consumer Health by Category: % Value 2024-2029Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2024-2029

## 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 Denmark

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Post-pandemic stability and moderate value growth The analgesics landscape is highly consolidated as GlaxoSmithKline retains its lead E-commerce expansion in the analgesics market

# PROSPECTS AND OPPORTUNITIES

Shifts towards holistic health and potential decline in analgesics demand Growth in paediatric acetaminophen linked to higher birth rates Pharmacies to face rising competition from e-commerce

# CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2019-2024Table 13 - Sales of Analgesics by Category: % Value Growth 2019-2024Table 14 - NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 - LBN Brand Shares of Analgesics: % Value 2021-2024Table 16 - Forecast Sales of Analgesics by Category: Value 2024-2029Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

## Sleep Aids in Denmark

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Increasing demand for sleep aids due to busy lifestyles Melatonin's rising popularity poses competition for sleep aids Consumer trust in established brands limits private label growth

## PROSPECTS AND OPPORTUNITIES

E-commerce to capture greater share of sleep aid sales Growing interest in non-medicinal alternatives Potential for melatonin to become OTC in Denmark

## CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2019-2024Table 19 - Sales of Sleep Aids: % Value Growth 2019-2024Table 20 - NBO Company Shares of Sleep Aids: % Value 2020-2024Table 21 - LBN Brand Shares of Sleep Aids: % Value 2021-2024Table 22 - Forecast Sales of Sleep Aids: Value 2024-2029Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2024-2029

# Cough, Cold and Allergy (Hay Fever) Remedies in Denmark

### KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Antihistamines experience strong value growth amidst prolonged allergy season Stabilisation of cough remedies and decongestants post-pandemic GSK Consumer Healthcare maintains its leading position, but generics continue to gain ground

## PROSPECTS AND OPPORTUNITIES

Increased competition from natural remedies and VDS products Continued growth in allergy remedies due to extended pollen seasons E-commerce growth to intensify as online pharmacies expand

## CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

## Dermatologicals in Denmark

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Increased attention to hair loss treatments with return to socialising Moderate growth in OTC medicated shampoos after 2023 decline E-commerce growth driven by convenience and privacy for dermatologicals

## PROSPECTS AND OPPORTUNITIES

Sustained growth in dermatologicals driven by aesthetic and lifestyle factors Antiparasitics/lice treatments to see solid demand as schools resume Trusted brands to dominate as consumers prioritise safety and efficiency

## CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2019-2024Table 31 - Sales of Dermatologicals by Category: % Value Growth 2019-2024Table 32 - NBO Company Shares of Dermatologicals: % Value 2020-2024Table 33 - LBN Brand Shares of Dermatologicals: % Value 2021-2024Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2021-2024Table 35 - Forecast Sales of Dermatologicals by Category: Value 2024-2029Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

# Digestive Remedies in Denmark

### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Ageing population and stressful lifestyles fuel demand for indigestion and heartburn remedies Travel surge drives growth in motion sickness and diarrhoeal remedies E-commerce growth enhances access to digestive remedies

# PROSPECTS AND OPPORTUNITIES

Sustained travel demand to support motion sickness and diarrhoeal remedies Busy lifestyles and poor dietary habits to drive demand for digestive remedies Holistic health trends could challenge growth in digestive remedies

### CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2019-2024

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2020-2024

 Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

# Eye Care in Denmark

## **KEY DATA FINDINGS**

### 2024 DEVELOPMENTS

Allergy eye care continues growth amidst extended pollen season Increased screen time drives growth in standard eye care E-commerce continues to gain ground

# PROSPECTS AND OPPORTUNITIES

Allergy eye care set to grow as allergies become more prevalent Continued demand for standard eye care due to screen exposure and ageing population New opportunities for eye care targeting younger demographics

# CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2019-2024Table 44 - Sales of Eye Care by Category: % Value Growth 2019-2024

Table 45 - NBO Company Shares of Eye Care: % Value 2020-2024Table 46 - LBN Brand Shares of Eye Care: % Value 2021-2024Table 47 - Forecast Sales of Eye Care by Category: Value 2024-2029Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

# NRT Smoking Cessation Aids in Denmark

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Declining smoking prevalence impacts NRT sales Highly consolidated market with limited competition E-commerce growth driven by convenience and repeat purchases

# PROSPECTS AND OPPORTUNITIES

Continued decline in smoking prevalence to challenge NRT demand E-commerce growth to continue, but pharmacies to retain dominance NRT smoking cessation aids likely to face competition from alternative products

# CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2019-2024

# CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

## Wound Care in Denmark

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Increased outdoor activities drive growth First aid kits experience renewed demand Grocery retailers dominate distribution

# PROSPECTS AND OPPORTUNITIES

Steady growth supported by active lifestyles The need for product innovation The rise of private label

# CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2019-2024
Table 57 - Sales of Wound Care by Category: % Value Growth 2019-2024
Table 58 - NBO Company Shares of Wound Care: % Value 2020-2024
Table 59 - LBN Brand Shares of Wound Care: % Value 2021-2024
Table 60 - Forecast Sales of Wound Care by Category: Value 2024-2029
Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

# Sports Nutrition in Denmark

**KEY DATA FINDINGS** 

## 2024 DEVELOPMENTS

Solid growth in all sports nutrition categories Strong growth in sports protein RTD and bars E-commerce as the leading channel for sports nutrition

## PROSPECTS AND OPPORTUNITIES

Continued growth driven by health and wellness trends Growth in vegan and natural sports nutrition products E-commerce to dominate amidst growing competition

# CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2019-2024
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2020-2024
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

# Dietary Supplements in Denmark

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Growth driven by health and wellness trends Rising demand for vegan supplements E-commerce continues to thrive

## PROSPECTS AND OPPORTUNITIES

Growing demand for premium and private label supplements Increased competition from private label supplements Growing interest in inner beauty supplements

# CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2019-2024
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2019-2024
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2020-2024
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

# Vitamins in Denmark

# **KEY DATA FINDINGS**

### 2024 DEVELOPMENTS

Growth driven by health and wellness focus Vitamin D continues to dominate E-commerce gains ground

# PROSPECTS AND OPPORTUNITIES

Continued growth for vitamin C and vitamin D Multivitamins face growing competition from personalised supplements Increasing popularity of private label vitamins

# CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2019-2024Table 76 - Sales of Vitamins by Category: % Value Growth 2019-2024Table 77 - Sales of Multivitamins by Positioning: % Value 2019-2024Table 78 - NBO Company Shares of Vitamins: % Value 2020-2024Table 79 - LBN Brand Shares of Vitamins: % Value 2021-2024Table 80 - Forecast Sales of Vitamins by Category: Value 2024-2029

 Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

# Weight Management and Wellbeing in Denmark

# **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Shift towards holistic health and lower growth in meal replacements Surge in semaglutide products like Ozempic and Wegovy E-commerce growth continues in weight management products

# PROSPECTS AND OPPORTUNITIES

Increased product innovation to meet dietary and lifestyle preferences Continued growth in semaglutide sales and its impact on other categories Increasing competition from protein-based products

## CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2019-2024
Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

# Herbal/Traditional Products in Denmark

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Positive growth amidst health and wellness trend Fragmented market with rising competition E-commerce drives convenience and growth

# PROSPECTS AND OPPORTUNITIES

Moderate growth as holistic health gains popularity Brand trust to remain a key factor in consumer choices E-commerce growth to challenge physical stores

# CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2019-2024Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2019-2024Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2024-2029Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2024-2029

Paediatric Consumer Health in Denmark

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Growing demand for paediatric vitamins and dietary supplements Stabilisation of paediatric analgesics growth Rise of e-commerce for paediatric consumer health products

# PROSPECTS AND OPPORTUNITIES

Positive growth supported by birth rate and product variety Continued preference for well-known brands Anticipated growth for paediatric acetaminophen

# CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

- Table 95 Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024
- Table 96 NBO Company Shares of Paediatric Consumer Health: % Value 2020-2024
- Table 97 LBN Brand Shares of Paediatric Consumer Health: % Value 2021-2024
- Table 98 Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029
- Table 99 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2024-2029

# 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-denmark/report.