



**Euromonitor
International**

Consumer Health in Germany

November 2024

Table of Contents

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 2019-2024
Table 2 - Life Expectancy at Birth 2019-2024

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2019-2024
Table 4 - Sales of Consumer Health by Category: % Value Growth 2019-2024
Table 5 - NBO Company Shares of Consumer Health: % Value 2020-2024
Table 6 - LBN Brand Shares of Consumer Health: % Value 2021-2024
Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2019-2024
Table 8 - Distribution of Consumer Health by Format: % Value 2019-2024
Table 9 - Distribution of Consumer Health by Format and Category: % Value 2024
Table 10 - Forecast Sales of Consumer Health by Category: Value 2024-2029
Table 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 preventative medicine
Switches
Summary 1 - OTC: Switches 2023-2024

DISCLAIMER

DEFINITIONS

SOURCES

Summary 2 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate growth for analgesics in 2024
Product segmentation continues within the category
Retail e-commerce gains further traction

PROSPECTS AND OPPORTUNITIES

Growth prospects limited by holistic approach to wellness along with maturity
Private label to offer further growth potential with affordable options
Competitive landscape to remain largely unchanged

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2019-2024
Table 13 - Sales of Analgesics by Category: % Value Growth 2019-2024

Table 14 - NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 - LBN Brand Shares of Analgesics: % Value 2021-2024

Table 16 - Forecast Sales of Analgesics by Category: Value 2024-2029

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

Sleep Aids in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising demand for sleep aids as Germans struggle with stressful lifestyles

Competitive landscape remains fairly consolidated but new players see potential

Sleep aids often substituted with magnesium supplements

PROSPECTS AND OPPORTUNITIES

Younger consumers a potential source of growth

Innovative and more potent formulations to see greater demand

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2019-2024

Table 19 - Sales of Sleep Aids: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Sleep Aids: % Value 2020-2024

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2021-2024

Table 22 - Forecast Sales of Sleep Aids: Value 2024-2029

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2024-2029

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Solid performance by antihistamines/allergy remedies driven by greater exposure to allergens due to time spent outdoors

Medicated confectionery remains strong growth driver in category

Procter & Gamble retains lead of cough, cold and allergy (hay fever) remedies

PROSPECTS AND OPPORTUNITIES

Stable outlook for cough, cold and allergy (hay fever) remedies

Positive future for herbal/traditional options as consumers increasingly move towards perceived natural solutions

Omnichannel approach to sales to remain prevalent

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

Dermatologicals in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthy performance for dermatologicals in 2024

Haemorrhoid treatments remains solid performer due to sedentary lifestyles and rising health challenges

Blurring of lines between dermatologicals and dermocosmetics continues

PROSPECTS AND OPPORTUNITIES

- Growing health and image awareness to support future sales
- Demand for dermatologicals influenced by environmental factors
- Hair loss treatments to remain strongest performer

CATEGORY DATA

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

Digestive Remedies in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Positive growth for digestive remedies in Germany due to busy, stressful lifestyles
- Chronic digestive issues support overall demand
- Sanofi-Aventis retains slim lead over Bayer

PROSPECTS AND OPPORTUNITIES

- Positive growth trajectory expected for mature category
- Germany's ageing population to support stable demand
- Focus on gut health may pose challenges

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Several factors contribute to rising demand for eye care in Germany
- Surge in allergies helps to drive stronger performance of allergy eye care
- Increasing eye problems among younger population a strong growth driver

PROSPECTS AND OPPORTUNITIES

- Positive outlook for eye care driven by long-term trends
- Innovations expected to add specific value
- Development of more sophisticated formulations to drive interest

CATEGORY DATA

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

Table 45 - NBO Company Shares of Eye Care: % Value 2020-2024

Table 46 - LBN Brand Shares of Eye Care: % Value 2021-2024

Table 47 - Forecast Sales of Eye Care by Category: Value 2024-2029

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

NRT Smoking Cessation Aids in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sales supported by wellness and self-improvement trends
- Lozenges format attracts consumers seeking convenience and discretion
- Competitive landscape remains dominated by several major players

PROSPECTS AND OPPORTUNITIES

- Possible investments in new products in attempt to drive up demand
- Competition from e-cigarettes and heated tobacco products
- Retail e-commerce will continue to gain ground

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2019-2024

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

Wound Care in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Demand for wound care supported by outdoor activities
- More advanced and natural products emerge within wound care
- Beiersdorf retains convincing lead, but private label offers competition

PROSPECTS AND OPPORTUNITIES

- Stable growth predicted for the forecast period
- Consumers' economic caution will continue to support private label sales
- Positive future for retail e-commerce within wound care

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another year of dynamic growth for sports nutrition
Sports protein RTD benefits from convenience appeal
Multichannel strategy aligns with category fragmentation

PROSPECTS AND OPPORTUNITIES

Increasing health awareness to support future growth
Innovation and bespoke product development to drive the category
Convenience and on-the-go shopping to support sales

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dietary supplements continues to perform positively
Sexual wellness supplements gain attention
Competition continues to rise in fragmented landscape

PROSPECTS AND OPPORTUNITIES

Increasing focus on segmentation and product innovation
Promising outlook for collagen and probiotic supplements
Forecast period to see demand for cycle-specific 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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Less dynamic growth for vitamins due to maturity in local market
Vitamins A and D are most dynamic performers in 2024
Segmentation continues within the category

PROSPECTS AND OPPORTUNITIES

Vitamins to remain an important element of healthy lifestyles
Challenges and opportunities for multivitamins
Wellness trend to provide increasing challenge

CATEGORY DATA

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Stable performance for weight management and wellbeing
- Meal replacement remains most dynamic performer
- Competition from prescription medication for weight management

PROSPECTS AND OPPORTUNITIES

- Ongoing competitive threats to weight management and wellbeing
- Innovation and convenience are key to driving interest
- Further pressure on weight management products from Rx obesity medicines

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 Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Stable but undynamic performance for herbal/traditional products in 2024
- Cough, cold and allergy (hay fever) remedies retains key role in category
- Strong consumer interest in topical analgesics and sleep aids

PROSPECTS AND OPPORTUNITIES

- Moderate growth expected over the forecast period
- CBD-infused sleep aids may garner greater interest
- Competitive landscape likely to remain fragmented

CATEGORY DATA

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

Paediatric Consumer Health in Germany

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate growth for paediatric consumer health in 2024
Fortified foods compete with vitamins and dietary supplements for children
A visible correlation with adult consumer health trends

PROSPECTS AND OPPORTUNITIES

Growth will be limited but supported by preventative health approach
Shift to natural products over the forecast period
Demand for paediatric vitamins and dietary supplements will remain resilient

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-germany/report.