



Consumer Health in Malaysia

October 2023

Table of Contents

Consumer Health in Malaysia

EXECUTIVE SUMMARY

Consumer health in 2023: the big picture

2023 key trends

Competitive landscape

Retailing developments

What's next for consumer health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

Table 2 - Life Expectancy at Birth 2018-2023

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2018-2023

Table 4 - Sales of Consumer Health by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Consumer Health: % Value 2019-2023

Table 6 - LBN Brand Shares of Consumer Health: % Value 2020-2023

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 - Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

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 Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

New product innovation fuels growth in topical analgesics

Rise in herbal/traditional options by local manufacturers

Inflationary pressures facilitate switch to generic brands and private labels

PROSPECTS AND OPPORTUNITIES

Analgesics expected to continue on steady growth trajectory

Growth in number of new launches targeting sports-related pain, as well as those with a more convenient application format

Greater adoption of generic analgesics is expected to lower unit prices

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2018-2023

Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 - Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers in Malaysia maintain appetite for cough, cold and allergy (hay fever) remedies due to sustained interest in illness prevention

Emergence of more innovative formats, such as patches and sprays

Rising competition from immunity-strengthening vitamins and dietary supplements

PROSPECTS AND OPPORTUNITIES

Positive outlook fuelled by return of busier, more sociable lifestyles, with herbal/traditional ingredients continuing as key manufacturer focus

Development of new product for specialised use

Blurring of lines between vitamins and dietary supplements and cough, cold and allergy (hay fever) remedies

CATEGORY DATA

Table 18 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 19 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 21 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 22 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 23 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

Dermatologicals in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mixed performance in 2023, as consumers return to active, outdoor lifestyles

Hair loss treatments hone in on cutting-edge stem cell technology

Rise in sales performance of private label as manufacturers eye opportunity of soaring living cost

PROSPECTS AND OPPORTUNITIES

Increasingly sophisticated demand from parents to drive demand for nappy (diaper) rash treatments

Positive outlook for domestic manufacturers

Offline sales likely to retain dominant but e-commerce showing signs of promise

CATEGORY DATA

Table 24 - Sales of Dermatologicals by Category: Value 2018-2023

Table 25 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 27 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 28 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 29 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 30 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

Digestive Remedies in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

High-stress lifestyles contribute to strong growth in antacids

On-the-go formats accommodate time-pressed consumers
Domestic manufacturers ramp up their investment in digestive remedies

PROSPECTS AND OPPORTUNITIES

Trend towards busier lifestyles projected to spur growth in more convenient formats, including within motion sickness remedies
Rising competition from dietary supplements, as well as kombucha
Increasingly educated consumers to cultivate rising demand for diarrhoeal remedies

CATEGORY DATA

Table 31 - Sales of Digestive Remedies by Category: Value 2018-2023
Table 32 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023
Table 33 - NBO Company Shares of Digestive Remedies: % Value 2019-2023
Table 34 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023
Table 35 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028
Table 36 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

Eye Care in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand on eye care is boosted by strong exposure to digital gadgets
Innovative new launches with more advanced claims
New vial packaging format offers consumers a more hygiene option

PROSPECTS AND OPPORTUNITIES

Standard eye care expected to lead growth in eye care, with new product development likely to focus around greater efficacy and the treatment of specific issues
Eye health supplements pose a threat to the growth of eye care
Distribution through offline channels will remain solid, with convenience stores expected to grow in importance

CATEGORY DATA

Table 37 - Sales of Eye Care by Category: Value 2018-2023
Table 38 - Sales of Eye Care by Category: % Value Growth 2018-2023
Table 39 - NBO Company Shares of Eye Care: % Value 2019-2023
Table 40 - LBN Brand Shares of Eye Care: % Value 2020-2023
Table 41 - Forecast Sales of Eye Care by Category: Value 2023-2028
Table 42 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

NRT Smoking Cessation Aids in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Delay in tabling of smoking ban bill boosts growth for NRT smoking cessation aids
Sales of NRT smoking cessation aids remain largely confined to pharmacies although legislative changes will lead to wider distribution
Competitive landscape remains highly consolidated

PROSPECTS AND OPPORTUNITIES

Demand could potentially spike in the event of approval obtained for the Control of Smoking Products for Public Health Bill 2023
Legislative changes could have negative impact on NRT smoking cessation aids and give rise to vaping culture
Little change in competitive landscape

CATEGORY INDICATORS

Table 43 - Number of Smokers by Gender 2018-2023

CATEGORY DATA

Table 44 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 45 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 46 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 47 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 48 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 49 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

Wound Care in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resumption of outdoor activities spurs growth in wound care

Continued diversification in application format of plasters/adhesive bandages

Private label offerings produced by chained pharmacies are more serious competitors to leading brands

PROSPECTS AND OPPORTUNITIES

Wound care looks set to see healthy growth over the forecast period, fuelled by investment in new product development

Pharmacy chain network will continue to expand but convenience stores will also gain traction

Private label offerings look set to make further gains

CATEGORY DATA

Table 50 - Sales of Wound Care by Category: Value 2018-2023

Table 51 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 53 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 54 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 55 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

Sports Nutrition in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued healthy growth as a result of resumption of sport and fitness activities

Manufacturers seek to differentiate their portfolios through new ingredients

Convenient consumption formats cater to busy on-the-go lifestyles

PROSPECTS AND OPPORTUNITIES

Healthy growth expected, thanks to continued manufacturer innovation

Sports nutrition could face rising competition from other high-protein foods

Distribution likely to see a further shift online

CATEGORY DATA

Table 56 - Sales of Sports Nutrition by Category: Value 2018-2023

Table 57 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 59 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 60 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 61 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

Dietary Supplements in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Immunity remains a key focus in dietary supplements, while eye health and probiotic formulations benefit from return to busier lifestyles
Focus on supplements with a beauty positioning
Evolving product format discovered in dietary supplement results in blurring between food and beverage with health supplements

PROSPECTS AND OPPORTUNITIES

Holistic health approach will be key manufacturer focus
New, advanced ingredients and more convenient formats will drive growth
Online sales and marketing set to expand as competition grows

CATEGORY DATA

Table 62 - Sales of Dietary Supplements by Category: Value 2018-2023
Table 63 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023
Table 64 - Sales of Dietary Supplements by Positioning: % Value 2018-2023
Table 65 - NBO Company Shares of Dietary Supplements: % Value 2019-2023
Table 66 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023
Table 67 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028
Table 68 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

Vitamins in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Single vitamins continue to grow in popularity, with immunity-boosting products seeing high demand
Multivitamins strengthen their appeal
Slower-release immunity-strengthening products remain popular, as preventative health trend persists

PROSPECTS AND OPPORTUNITIES

Multivitamins will target the needs of specific consumer groups in order to become more competitive
New and innovative formats expected to inform new product launches
Private labels anticipated to gain traction as a result of high cost of living

CATEGORY DATA

Table 69 - Sales of Vitamins by Category: Value 2018-2023
Table 70 - Sales of Vitamins by Category: % Value Growth 2018-2023
Table 71 - Sales of Multivitamins by Positioning: % Value 2018-2023
Table 72 - NBO Company Shares of Vitamins: % Value 2019-2023
Table 73 - LBN Brand Shares of Vitamins: % Value 2020-2023
Table 74 - Forecast Sales of Vitamins by Category: Value 2023-2028
Table 75 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

Weight Management and Wellbeing in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Weight management and wellbeing sees healthy growth as Malaysians seeks convenient solutions to their nutritional needs
Slimming teas face competition from other weight-loss drinks, with more interesting and diversified flavours
International direct sellers adopt localised marketing campaigns to boost consumption

PROSPECTS AND OPPORTUNITIES

Growing levels of health-consciousness will spark aggressive new launches by retailers
Local brands to gain traction

Growing competition from sports nutrition products, which are increasingly marketed with weight management benefits

CATEGORY DATA

Table 76 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 77 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 78 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 79 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 80 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 81 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

Herbal/Traditional Products in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for herbal/traditional products remains strong , with immunity remaining a key focus in tonics

Tiger milk mushroom sees high degree of manufacturer interest

Competitive landscape becomes increasingly fragmented, as new manufacturers emerge with new product launches

PROSPECTS AND OPPORTUNITIES

Research and development to focus on herbal/traditional cough remedies

Immunity-strengthening herbal/traditional dietary supplements and tonics are expected to gain greater exposure

Manufacturers set to diversify their product ranges

CATEGORY DATA

Table 82 - Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 83 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 85 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 86 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 87 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

Paediatric Consumer Health in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Paediatric vitamins and dietary supplements continue to enjoy solid growth as parents prioritise children's preventative health

Paediatric vitamins and dietary supplements evolve in line with changing lifestyles

Products to support cognitive development gain traction

PROSPECTS AND OPPORTUNITIES

Robust growth expected for paediatric vitamins and dietary supplements, with brands sold in bricks-and-mortar retailers leading the way

Strong potential for products that can support academic performance

Expansion of pharmacy network will be key driver of growth, but e-commerce will grow in importance

CATEGORY DATA

Table 88 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 89 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 90 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 91 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 92 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 93 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2023-2028

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-malaysia/report.