



# Consumer Health in Kenya

January 2024

Table of Contents

## Consumer Health in Kenya

### EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

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

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

Table 9 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 10 - 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 Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation leads to rising prices across the category

Greater awareness among consumers about product usage

Companies use new product formats as point of differentiation

#### PROSPECTS AND OPPORTUNITIES

Administrative challenges to curb industry growth

Affordability concerns offer opportunities for local players

Companies should prioritise marketing to maintain brand recall

### CATEGORY DATA

Table 11 - Sales of Analgesics by Category: Value 2018-2023

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

Table 13 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 14 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 15 - Forecast Sales of Analgesics by Category: Value 2023-2028

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

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

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Regulations restrict sales to pharmacy only

Brands cater to consumers across all income profiles

Herbal concoctions are still commonly used by consumers

#### PROSPECTS AND OPPORTUNITIES

Affordability concerns drive demand for local brands

Marketing campaigns target prescribers and pharmacists

Operational challenges amplify business costs

#### CATEGORY DATA

Table 17 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

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

Table 19 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 20 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 21 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

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

## Dermatologicals in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stigmas surrounding dermatological issues hinders category development

Focus on personal appearance drives demand among affluent consumers

Paediatric dermatologicals presents growth opportunities

#### PROSPECTS AND OPPORTUNITIES

Minimal constant value growth over forecast period

Pharmacies to remain the dominant channel

High import costs create challenges for local brands

#### CATEGORY DATA

Table 23 - Sales of Dermatologicals by Category: Value 2018-2023

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

Table 25 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 26 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 27 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 28 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

## Digestive Remedies in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Value sales growth gains momentum in 2023

Access to clean water and sanitation contributes to digestive issues

Affordability plays a significant role in purchasing decisions

## PROSPECTS AND OPPORTUNITIES

Sanitation and lifestyle shifts drives demand  
Local brands to raise competitive threat  
Ageing population will drive growth of digestive remedies

## CATEGORY DATA

Table 29 - Sales of Digestive Remedies by Category: Value 2018-2023  
Table 30 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023  
Table 31 - NBO Company Shares of Digestive Remedies: % Value 2019-2023  
Table 32 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023  
Table 33 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028  
Table 34 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

## Wound Care in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Most consumers seek affordable options in wound care  
DIY options influence sales of wound care  
Pricing remains key to purchasing decision

## PROSPECTS AND OPPORTUNITIES

Healthy growth anticipated over the forecast period  
Awareness and educational campaigns should enhance volume growth  
Unique wound care formats are sought by consumers in higher income groups

## CATEGORY DATA

Table 35 - Sales of Wound Care by Category: Value 2018-2023  
Table 36 - Sales of Wound Care by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Wound Care: % Value 2019-2023  
Table 38 - LBN Brand Shares of Wound Care: % Value 2020-2023  
Table 39 - Forecast Sales of Wound Care by Category: Value 2023-2028  
Table 40 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Healthy lifestyles and access to gyms contribute to growth  
High-income groups are primary consumers of sports nutrition  
Sports nutrition limited by its niche status

## PROSPECTS AND OPPORTUNITIES

Affordability concerns and limited customer base will stifle growth  
Increased number of vegans to influence product development  
Limited distribution impedes visibility and hinders growth

## CATEGORY DATA

Table 41 - Sales of Sports Nutrition by Category: Value 2018-2023  
Table 42 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023  
Table 43 - NBO Company Shares of Sports Nutrition: % Value 2019-2023  
Table 44 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 45 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 46 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Affluent consumers use dietary supplement to bridge nutritional gaps  
General health focused dietary supplements outperform specific products  
E-commerce is offering more options to consumers

#### PROSPECTS AND OPPORTUNITIES

Weak growth potential expected over the forecast period  
Increased veganism sees rising demand for dietary supplements  
Growing health awareness to support growth in the longer term

#### CATEGORY DATA

Table 47 - Sales of Dietary Supplements by Category: Value 2018-2023  
Table 48 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023  
Table 49 - Sales of Dietary Supplements by Positioning: % Value 2018-2023  
Table 50 - NBO Company Shares of Dietary Supplements: % Value 2019-2023  
Table 51 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023  
Table 52 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028  
Table 53 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

## Vitamins in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Multivitamins are the star performer in this growing category  
Middle and high-income consumer groups drive sales of vitamins  
DIY options are the preferred option to boost vitamin intake

#### PROSPECTS AND OPPORTUNITIES

High costs of living will dampen sales and brand choice  
Medical professionals are a key influencer in driving awareness and product usage  
E-commerce is a growing channel although stock outages remain a key issue

#### CATEGORY DATA

Table 54 - Sales of Vitamins by Category: Value 2018-2023  
Table 55 - Sales of Vitamins by Category: % Value Growth 2018-2023  
Table 56 - Sales of Multivitamins by Positioning: % Value 2018-2023  
Table 57 - NBO Company Shares of Vitamins: % Value 2019-2023  
Table 58 - LBN Brand Shares of Vitamins: % Value 2020-2023  
Table 59 - Forecast Sales of Vitamins by Category: Value 2023-2028  
Table 60 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

## Weight Management and Wellbeing in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Higher prices drive value growth in weight loss supplements

Weight loss trends see growing preference for healthier eating

Sedentary lifestyles is leading to rising obesity rates

## PROSPECTS AND OPPORTUNITIES

Weaker outlook in the upcoming years

Healthier diets and lifestyles will lead to lower demand for slimming aids

Pharmacies will remain dominant channel as e-commerce gains traction

## CATEGORY DATA

Table 61 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 62 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 64 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 65 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

## Herbal/Traditional Products in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Herbal treatments are to occupy an important place among Kenyans

Industry shifts towards greater regulation of herbal products

Pricing differences influence the purchasing decision

### PROSPECTS AND OPPORTUNITIES

Muted performance over forecast period

Cultural trends may prove to be a limitation to category growth

Social media is a vital tool in promoting herbal and traditional products

## CATEGORY DATA

Table 67 - Sales of Herbal/Traditional Products: Value 2018-2023

Table 68 - Sales of Herbal/Traditional Products: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 70 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 71 - Forecast Sales of Herbal/Traditional Products: Value 2023-2028

Table 72 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2023-2028

## Paediatric Consumer Health in Kenya

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong brand loyalty helps to maintain sales for leading players

Affordability is balanced with efficacy in purchasing decision

Medical professionals are important for brand promotion

### PROSPECTS AND OPPORTUNITIES

Slower growth expected over the forecast period

New product formulations and packaging to garner interest among children

Shift towards natural products over forecast period

## CATEGORY DATA

Table 73 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 74 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 75 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 76 - 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-kenya/report](http://www.euromonitor.com/consumer-health-in-kenya/report).