

Consumer Health in Slovenia

October 2024

Table of Contents

Consumer Health in Slovenia

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 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 preventive medicine

Switches

DISCLAIMER

DEFINITIONS

SOURCES

Summary 1 - Research Sources

Analgesics in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Expansion of labour-intensive industries and upsurge in sports activities drives growth in 2024

Rising incidence of conditions such as arthritis supports sales of adult naproxen

Declining demand for paediatric ibuprofen; however marketing and advertising efforts could have a positive long-term impact

PROSPECTS AND OPPORTUNITIES

Expansion of e-commerce supports future growth

Rising prices will boost sales of generics

Concerns regarding the safety of ibuprofen and rising demand for faster-acting alternatives such as CBD

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

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cough and cold cases return to pre-pandemic levels, benefiting sales in 2024

Combination products' sales supported by a return to pre-pandemic behaviours and rising prevalence of allergy cases International companies maintain their dominance; however, private label is gaining ground in 2024

PROSPECTS AND OPPORTUNITIES

Continued demand despite maturity and consumer focus on preventative health care

Pharmacies face rising competition from e-commerce

Pharyngeal preparations and nasal sprays will benefit from a growing online presence

CATEGORY DATA

- Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024
- Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024
- Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024
- Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024
- Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029
- Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

Dermatologicals in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand driven by innovation, e-commerce and desire for healthy skin

Hair loss affecting an increasing percentage of the population

Topical allergy remedies/antihistamines and vaginal antifungals continue to enjoy strong demand

PROSPECTS AND OPPORTUNITIES

Influx of new products expected

Rising availability of products online set to benefit hair loss treatments

An increasingly fragmented and segmented category

CATEGORY DATA

- Table 24 Sales of Dermatologicals by Category: Value 2019-2024
- Table 25 Sales of Dermatologicals by Category: % Value Growth 2019-2024
- Table 26 NBO Company Shares of Dermatologicals: % Value 2020-2024
- Table 27 LBN Brand Shares of Dermatologicals: % Value 2021-2024
- Table 28 Forecast Sales of Dermatologicals by Category: Value 2024-2029
- Table 29 Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

Digestive Remedies in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Travel and rising demand drive further growth in a mature product area Unhealthy eating habits continue to support sales Polarisation as both premium herbal products and affordable economy options are increasingly sought

PROSPECTS AND OPPORTUNITIES

Stable demand for digestive remedies supported by busy lifestyles and poor eating habits

Indigestion and heartburn will remain prevalent health conditions

Growing interest in holistic and preventive approaches challenge sales

CATEGORY DATA

Table 30 - Sales of Digestive Remedies by Category: Value 2019-2024

Table 31 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024

Table 32 - NBO Company Shares of Digestive Remedies: % Value 2020-2024

Table 33 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024

Table 34 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029

Table 35 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

Wound Care in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stable consumer demand in 2024

New vehicles and tourism drive sales of first aid kits

Tourism, especially adventure tourism, boots wound care

PROSPECTS AND OPPORTUNITIES

Challenges ahead

Expansion of private label in a time of heightened price sensitivity

Growth of modern grocery retail, e-commerce and tourism will boost demand

CATEGORY DATA

Table 36 - Sales of Wound Care by Category: Value 2019-2024

Table 37 - Sales of Wound Care by Category: % Value Growth 2019-2024

Table 38 - NBO Company Shares of Wound Care: % Value 2020-2024

Table 39 - LBN Brand Shares of Wound Care: % Value 2021-2024

Table 40 - Forecast Sales of Wound Care by Category: Value 2024-2029

Table 41 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

Sports Nutrition in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fitness culture continues to drive demand in 2024

E-commerce offers convenience, wide product variety and discounts

Consumers are more attuned to how protein supports overall health

PROSPECTS AND OPPORTUNITIES

Future growth with the rising importance of the fitness and gym culture

Low income of younger consumers and rising cost of living remain key obstacles to future expansion

Convenience and on-the-go consumption will continue to drive consumer demand

CATEGORY DATA

Table 42 - Sales of Sports Nutrition by Category: Value 2019-2024

Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024

Table 44 - NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 46 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

Dietary Supplements in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dietary supplements continue to benefit from the health and wellness trend in 2024
Assortment expansion and increased promotion boost demand for probiotic supplements
Innovation drives growth over the review period and in 2024

PROSPECTS AND OPPORTUNITIES

New products based on the latest technological and scientific advancements

E-commerce to play a key role in the future development and diversification of dietary supplements

Clear information to address consumers' concerns

CATEGORY DATA

Table 48 - Sales of Dietary Supplements by Category: Value 2019-2024

Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024

Table 50 - Sales of Dietary Supplements by Positioning: % Value 2019-2024

Table 51 - NBO Company Shares of Dietary Supplements: % Value 2020-2024

Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024

Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029

Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

Vitamins in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising health and wellness trend and improved distribution support sales in 2024 Positive impact of government and media influence Sales further supported by growth of e-commerce

PROSPECTS AND OPPORTUNITIES

Maintaining overall health and wellbeing drives growth over the forecast period Importance of innovation and e-commerce Competition rises as vitamins become enriched in various food products

CATEGORY DATA

Table 55 - Sales of Vitamins by Category: Value 2019-2024

Table 56 - Sales of Vitamins by Category: % Value Growth 2019-2024

Table 57 - Sales of Multivitamins by Positioning: % Value 2019-2024

Table 58 - NBO Company Shares of Vitamins: % Value 2020-2024

Table 59 - LBN Brand Shares of Vitamins: % Value 2021-2024

Table 60 - Forecast Sales of Vitamins by Category: Value 2024-2029

Table 61 - Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

Weight Management and Wellbeing in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand driven by rising obesity rates and the health and wellness trend

Nutrition changes further support category growth

Market is strongly driven by price sensitivity in 2024

PROSPECTS AND OPPORTUNITIES

Weight management products more convenient than lifestyle changes

Government endeavours will further support category growth

Consumers appreciate the array of choices, prices and convenience of e-commerce

CATEGORY DATA

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

Herbal/Traditional Products in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Stronger consumer emphasis on health and wellbeing benefits herbal/traditional products

Post-pandemic lifestyles drive growth of cough and cold remedies and sleep aids

Herbal/traditional products market remains highly fragmented in 2024

PROSPECTS AND OPPORTUNITIES

Increased focus on herbal/traditional brands to drive future growth

Herbal/traditional digestive remedies benefit from an ageing population and growing number of vegans

Availability of affordable products online will continue to attract consumers

CATEGORY DATA

Table 68 - Sales of Herbal/Traditional Products: Value 2019-2024

Table 69 - Sales of Herbal/Traditional Products: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024

Table 71 - LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024

Table 72 - Forecast Sales of Herbal/Traditional Products: Value 2024-2029

Table 73 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2024-2029

Paediatric Consumer Health in Slovenia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising consumer interest in child-specific products drives growth

Increasing brand presence supports sales of paediatric cough, cold and allergy remedies

E-commerce growth positively impacts the paediatric consumer health market

PROSPECTS AND OPPORTUNITIES

Rising cost of living will force consumers to consider their purchases more carefully

Low birth rates limit the potential size of the consumer base

Rising demand for paediatric cough/cold remedies due to the full reopening of society and an increasing brand presence

CATEGORY DATA

Table 74 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 77 - 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 focusing 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-slovenia/report.