



# Consumer Health in Slovenia

October 2023

Table of Contents

## Consumer Health in Slovenia

### 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 - Penetration of Private Label 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 Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increasing labour and sports activity leads to a rise in sales during 2023

Topical analgesics drives sales, with a wide variety of formats available

Lekadol remains the leading brand, offered in various formats to consumers

#### PROSPECTS AND OPPORTUNITIES

Results return to pre-pandemic levels, while ketoprofen gains momentum

Inflation adapts consumer shopping habits, boosting sales of generics

Consumers look for fast acting alternatives, turning to CBD offerings

### 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 Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The intense cold and flu season benefits sales in 2023

Rising allergy levels due to heightened pollution and allergenic species

While international players lead, private label offerings gain ground

#### PROSPECTS AND OPPORTUNITIES

Growth remains positive; however, preventative health care impacts sales

Pharmacies retain dominance for distributions, as online sales are not permitted

A high level of advertising creates solid competition across the forecast period

#### 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 Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers increasingly seek medicated and non-medicated products

The hot and humid weather increases fungal infections, boosting sales

Stress increases scalp issues among consumers, driving sales of medicated shampoos

#### PROSPECTS AND OPPORTUNITIES

Haemorrhoid treatments record growth as dietary choices impact consumers' health

Physical stores to benefit from provision of expertise

Consumers become concerned about chemical formulations

#### 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 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

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

## Digestive Remedies in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

While preventative measures rise, unhealthy eating habits continue to drive sales

Increasing travel and tourism boosts sales of motion sickness remedies

Herbal ingredients become popular as consumers worry about OTC side effects

## PROSPECTS AND OPPORTUNITIES

Busy and stressful lifestyles aid sales of digestive remedies over the forecast period

Expanding availability and the growth of private label drives sales

Growing interest in holistic and preventive approaches challenge sales

## CATEGORY DATA

Table 30 - Sales of Digestive Remedies by Category: Value 2018-2023

Table 31 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 33 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 34 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 35 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

## Wound Care in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales rise as consumers purchase essential wound care to donate

New vehicles and tourism drive sales of first aid kits

Rising levels of sports activities boost sales of wound care

### PROSPECTS AND OPPORTUNITIES

Inflation impacts sales while increasing the appeal of private label goods

Sporting activity and exercise to boost ongoing demand

E-commerce is yet to be established on the landscape

## CATEGORY DATA

Table 36 - Sales of Wound Care by Category: Value 2018-2023

Table 37 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 38 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 39 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 40 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 41 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The fitness culture is rising, boosting sales of sports nutrition

Sports Protein RTDs gain share, being an innovation for many

E-commerce sales rise as consumer demand for sports nutrition increases

### PROSPECTS AND OPPORTUNITIES

Many consumers prioritise sports nutrition during times of rising inflation

Rising employment among younger consumers would boost sales

E-commerce grows, with consumers opting for wide availability and convenience

## CATEGORY DATA

Table 42 - Sales of Sports Nutrition by Category: Value 2018-2023

Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 44 - NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

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

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

As stress levels rise, consumers look for dietary supplements to aid mood

Rising prices of food lead many to consume dietary supplements to remain healthy

Tonics and probiotic supplements record a solid expansion

#### PROSPECTS AND OPPORTUNITIES

Preventative healthcare rises, boosting sales of dietary supplements

The use of e-commerce increases, providing online only deals

Transparent communication increases to curb consumer concerns

#### CATEGORY DATA

Table 48 - Sales of Dietary Supplements by Category: Value 2018-2023

Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 50 - Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 51 - NBO Company Shares of Dietary Supplements: % Value 2019-2023

Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023

Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

## Vitamins in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

COVID-19 boosts self-care habits and increases sales of vitamins

The Slovenian government educates consumers, boosting sales

COVID-19 increases consumer purchases through e-commerce

#### PROSPECTS AND OPPORTUNITIES

Maintaining overall health and wellbeing drives growth over the forecast period

Private label players increase their offerings to compete with established brands

Competition rises as vitamins become enriched in various food products

#### CATEGORY DATA

Table 55 - Sales of Vitamins by Category: Value 2018-2023

Table 56 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 57 - Sales of Multivitamins by Positioning: % Value 2018-2023

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

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

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

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

## Weight Management and Wellbeing in Slovenia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising rates of obesity increase the consumer base for weight management products  
Sales benefit following limited socialising and activities seen during COVID-19  
Herbalife Nutrition retains its lead of the landscape, offering flavour variety

#### PROSPECTS AND OPPORTUNITIES

Solid growth boosted by the lack of motivation to make lifestyle changes  
Weight loss supplements record positive results, while some consumers choosing natural products  
E-commerce sales continue to rise as consumers appreciate choice and convenience

#### CATEGORY DATA

Table 62 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023  
Table 63 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023  
Table 64 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023  
Table 65 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023  
Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028  
Table 67 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

#### Herbal/Traditional Products in Slovenia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Social media and rising environmental consciousness encourage sales  
A fragmented competitive landscape leads to a wide variety of choice  
E-commerce posts strong sales, offering a wide variety of goods

#### PROSPECTS AND OPPORTUNITIES

Herbal/traditional dietary supplements and remedies for cough, cold, and allergies boost growth  
Herbal digestive remedies benefit from an ageing population in the country  
E-commerce is set to drive growth as consumers look for international products

#### CATEGORY DATA

Table 68 - Sales of Herbal/Traditional Products: Value 2018-2023  
Table 69 - Sales of Herbal/Traditional Products: % Value Growth 2018-2023  
Table 70 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023  
Table 71 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023  
Table 72 - Forecast Sales of Herbal/Traditional Products: Value 2023-2028  
Table 73 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2023-2028

#### Paediatric Consumer Health in Slovenia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

The trend for natural ingredients drives the growth of herbal/traditional products  
Growth in vitamins and dietary supplements as parents prioritise children's health  
Limited growth for paediatric digestive remedies as the use of probiotics rise

#### PROSPECTS AND OPPORTUNITIES

Premiumisation boosts value growth for paediatric consumer health  
Low birth rates impact retail volume sales while limiting the consumer base  
Demand for paediatric cough/cold remedies is set to fall following COVID-19

#### CATEGORY DATA

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

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 77 - 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-slovenia/report](http://www.euromonitor.com/consumer-health-in-slovenia/report).