

# Consumer Health in Ireland

October 2024

**Table of Contents** 

#### Consumer Health in Ireland

## **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 preventive medicine

Switches

## **DISCLAIMER**

## **DEFINITIONS**

#### **SOURCES**

Summary 1 - Research Sources

# Analgesics in Ireland

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

After a boost to sales from the tripledemic, stability returns

Leading product types remain the same

Aspirin ageing not well

## PROSPECTS AND OPPORTUNITIES

A return to a more stable performance, and a move to generic products

Losses of previous leader unlikely to be regained

Paediatric analgesics are a priority for Irish parents

## **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Increased demand for sleep aids

Shift towards OTC solutions, but competition from alternatives

Polarisation of share, with the leader and the smallest players both performing well

## PROSPECTS AND OPPORTUNITIES

Sustained growth expected for sleep aids

Evolving consumer preferences

Potential for new entrants

#### **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 Ireland

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Brands maintain dominance

Further gains for retail e-commerce

## PROSPECTS AND OPPORTUNITIES

Moderate growth forecast, with systemic antihistamines/allergy remedies set to perform well

Challenges for leading brands amidst regulatory scrutiny

Opportunities for generic and budget-friendly alternatives

# 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 Ireland

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Value growth continues, although this remains limited

Rising consumer interest in preventive care

Strong players in individual categories

#### PROSPECTS AND OPPORTUNITIES

Continued growth as consumers look for effective treatments

Innovation and product diversification

Retail e-commerce set to maintain its growth trend

#### **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Growth continues, while antacids maintains dominance amidst changing consumer preferences

Rising demand for IBS treatments and proton pump inhibitors

Return to normal travel patterns maintains growth for several categories

#### PROSPECTS AND OPPORTUNITIES

Growth likely to be limited as different pressures affect sales

Potential challenges for established antacids brands

Expanding role of rehydration solutions

## **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 Ireland

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Consumer demand for eye care products increases

More innovation in eye care

Quality is important in eye care

## PROSPECTS AND OPPORTUNITIES

Growth expected for both standard and allergy eye care

Expansion of sales via retail e-commerce expected

Focus on preventive eye care could have positive and negative impacts

## **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Increasing demand for NRT gum

McNeil Healthcare maintains its dominance

Government support enhances accessibility

## PROSPECTS AND OPPORTUNITIES

Sustained growth anticipated for NRT smoking cessation aids Innovation and product development Challenges from alternative cessation methods

## **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 Ireland

## KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Sustained growth in demand for wound care products
Sticking plasters/adhesive bandages leads in terms of sales and growth
Private label gains ground due to lower prices and innovation

## PROSPECTS AND OPPORTUNITIES

Stable growth expected moving forward Innovation and new product development Continued expansion of private label

## **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 Ireland

# KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Increasing mainstream adoption of sports nutrition
Innovations in product formats and functional ingredients

Local player Glanbia Plc reinforces its second position in sports nutrition

#### PROSPECTS AND OPPORTUNITIES

Increasing interest in health, exercise, and image will help drive growth

Expansion into non-protein sports nutrition

Growth of retail e-commerce set to continue

## **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Demand rises due to education and the maintenance of habits post-pandemic

Awareness of digestive health drives growth for probiotic supplements

Focus on immunity and preventive health

## PROSPECTS AND OPPORTUNITIES

Probiotic supplements will continue to see rising interest

E-commerce expansion likely to continue

Sustainability and clean label will be increasingly important

## 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 Ireland

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Solid growth for vitamins, but the peak growth rates have passed

Seven Seas maintains its dynamism as consumers look for convenience

Vitamins B and D are a winning combination

## PROSPECTS AND OPPORTUNITIES

Stable growth expected, with a focus on overall health and immunity

Challenges and opportunities for vitamins

Retailers are keen to develop private label products, but there are challenges

#### **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

An increasing number of consumers turn to diet and exercise to lose weight Meal replacement fails to return to growth, but slimming teas performs well Impact of prescription weight loss solutions and sports nutrition

## PROSPECTS AND OPPORTUNITIES

Little value movement expected as consumers doubt product efficacy

Opportunities for growth may still remain

Surgical solutions for obesity remain a threat to growth

#### **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 Ireland

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Stabilisation of growth for herbal/traditional products

Herbal/traditional sleep aids sees dynamism

Innovation driving competition in a fragmented competitive landscape

## PROSPECTS AND OPPORTUNITIES

Expansion of smaller categories expected

Consumer education as a growth lever

Demand for holistic health solutions is on the rise

## **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 Ireland

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Growth for paediatric analgesics and paediatric vitamins and dietary supplements

Nurofen takes the lead in paediatric consumer health

Expansion of product ranges in vitamins and dietary supplements

#### PROSPECTS AND OPPORTUNITIES

Expectation of continued rise in demand for immunity-boosting products

Innovation in delivery formats

Digital marketing and online sales growth

## **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-ireland/report.