



Consumer Health in Uzbekistan

October 2023

Table of Contents

Consumer Health in Uzbekistan

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand on the rise for analgesics

Acetaminophen and combination products remain popular options

Indian producers gain share as demand for lower-priced analgesics continues

PROSPECTS AND OPPORTUNITIES

Robust performance as consumer base expands

Level of competition to intensify

Russian and Belarusian brands face an uncertain future

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Post-pandemic recovery is still in play
- Rising demand for antihistamines/allergy remedies (systemic)
- Combination products is most popular choice

PROSPECTS AND OPPORTUNITIES

- Solid performance in cough, cold and allergy (hay fever) remedies
- Price competition to heat up in upcoming years
- Sustained popularity of combination products

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Uzbeks place low emphasis on dermatological products
- Expanding sales for topical antifungals
- Topical antihistamines/allergy remedies supported by growing prevalence of allergies

PROSPECTS AND OPPORTUNITIES

- Low consumer awareness of dermatologicals limits growth
- High birth rates to drive category expansion
- Local dermatological brands to remain limited

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Rebound in sales of digestive remedies
- Paediatric remedies witness robust growth
- Local food culture puts focus on digestive wellness

PROSPECTS AND OPPORTUNITIES

Moderate development of the category
International brands to reinforce strong position
Category continues to adapt to geopolitical changes

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slowdown in growth is visible in wound care
Local players capitalise on weaker economy
Price leads in wound care purchasing decisions

PROSPECTS AND OPPORTUNITIES

Slow and stable growth ahead for wound care
Sedentary lifestyles diminish demand for wound care
Expansion of pharmacies widens availability

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports nutrition is growing from a small base
Strong growth potential in major cities
Fragmented competitive landscape

PROSPECTS AND OPPORTUNITIES

Sports nutrition to witness modest growth from low base
Younger generation will remain key target audience
Focus to remain on sports protein powder

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive trend continues in dietary supplements

Local manufacturers have a stronghold in dietary supplements

Magnesium lactate and calcium in demand to support wellbeing

PROSPECTS AND OPPORTUNITIES

Dietary supplements face growing awareness but limited adoption remains a constraint

Local production to expand in dietary supplements

Basic dietary supplements to enjoy growth

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 Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vitamin sales begin to normalise in 2023

Growing demand for vitamin D

All-in-one solutions drive the multivitamins category

PROSPECTS AND OPPORTUNITIES

Steady pace of development ahead in vitamins

Vitamins targeting women's health face strong prospects

Foreign players likely to maintain a strong presence

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

Herbal/Traditional Products in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic surge in herbal/traditional products sales

Herbal cough remedies sought-after for children

Herbal solutions for men's and women's health

PROSPECTS AND OPPORTUNITIES

Slower growth period ahead for herbal/traditional products

Favourable conditions for local producers to flourish

Affordable local products to remain important

CATEGORY DATA

Table 61 - Sales of Herbal/Traditional Products: Value 2018-2023

Table 62 - Sales of Herbal/Traditional Products: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 64 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 65 - Forecast Sales of Herbal/Traditional Products: Value 2023-2028

Table 66 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2023-2028

Paediatric Consumer Health in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers place strong emphasis on children's health

Johnson's Baby leads nappy (diaper) rash treatments

Cautious approach to choosing paediatric OTC products

PROSPECTS AND OPPORTUNITIES

Sustained growth in paediatric consumer health

Promising outlook for paediatric analgesics

More parents to embrace modern medicines

CATEGORY DATA

Table 67 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 68 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 69 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 70 - 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-uzbekistan/report.