



Euromonitor
International

Consumer Health in Sweden

October 2024

Table of Contents

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rebound in demand drives moderate growth of analgesics
Acetaminophen is the preferred analgesic among Swedes
Retail e-commerce attracts consumers seeking lower prices and shopping convenience

PROSPECTS AND OPPORTUNITIES

Holistic approach to wellness and maturity will limit growth prospects
Pharmacies to remain top of the distribution landscape
Topical analgesics faces muted growth

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sleep aids in stronger demand due to digital lifestyles and stress
- Natural products with melatonin are gaining popularity
- Consumers seek familiar and reliable brands

PROSPECTS AND OPPORTUNITIES

- Holistic health focus likely to curb sales of sleep aids
- Melatonin-based sleep aids to come to the fore
- Retail e-commerce stands to expand its share of sales

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Mixed sales performances with antihistamines/allergy remedies as the stand-out performer
- Decongestants and cough remedies achieve greater normality
- Medicated confectionery continue to decline, despite broad distribution

PROSPECTS AND OPPORTUNITIES

- Competition from natural alternatives, vitamins and dietary supplements is set to rise
- Antihistamines/allergy remedies faces promising sales outlook
- Online pharmacies to extend their presence

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Healthy performance for dermatologicals in 2024
- Growing awareness of medicated shampoo drives sales

Online pharmacies push retail e-commerce to new highs

PROSPECTS AND OPPORTUNITIES

Dermatologicals to enjoy steady growth

Normal routines drive need for antiparasitics/lice (head and body) treatments

Competition from dermocosmetics is a potential challenge

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Swedish affection for travel supports sales of motion sickness and diarrhoeal remedies

Ageing population and stress drive demand for indigestion and heartburn remedies

Consumer preference for online pharmacies is rising

PROSPECTS AND OPPORTUNITIES

Digestive remedies will enjoy stable growth period

Strong appetite for travel to boost sales of indigestion and motion sickness remedies

Focus on holistic health may lower need for digestive remedies

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Allergies surge in Sweden driving demand for quick solutions

Prevalence of digital screen usage supports sales of standard eye care

Retail e-commerce sees dynamic growth in eye care

PROSPECTS AND OPPORTUNITIES

Higher incidence of allergies to support sales growth

Digital screen usage will continue to drive standard eye care needs

Opportunities to target children, teenagers and the ageing population

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- NRT smoking cessation aids in decline
- Consolidated landscape led by McNeil Sweden and GSK Consumer Healthcare
- Retail e-commerce strengthens its role in NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

- NRT smoking cessation aids faces ongoing decline
- E-commerce sales are expected to rise
- Limited possibility of new entrants

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Wound care faces slower retail growth
- Orkla strengthens its lead in wound care
- Wound care is frequently purchased with the weekly grocery shop

PROSPECTS AND OPPORTUNITIES

- Muted growth outlook reflects the maturity of wound care category
- Consumers' zest for travel and mobile lifestyles will support sales
- Private label in a strong position to increase retail value share

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumption of sports nutrition rises in 2024
Growing interest in convenience protein products
Retail e-commerce holds a substantial lead in sports nutrition

PROSPECTS AND OPPORTUNITIES

Healthy lifestyles will fuel growth in sports nutrition
Consumers are seeking plant-based alternatives
E-commerce strategies are crucial for players in sports nutrition

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Preventive health approach drives steady growth in dietary supplements
Vegan dietary supplements accommodate changing eating patterns
Retail e-commerce delivers greater convenience and choice

PROSPECTS AND OPPORTUNITIES

Scope for consumption to rise in dietary supplements
Quality of private label to attract consumers of mid-priced products
Collagen and probiotic supplements face promising outlook

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Vitamins enjoys uplift in daily consumption
Vitamin D retains its prominence among single vitamins
E-commerce channel continues to build share

PROSPECTS AND OPPORTUNITIES

Vitamins will remain integral to healthy lifestyles
Sales opportunities for both multivitamins and single vitamins
Private label to raise its profile in vitamins

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Weight management and wellbeing is under pressure
- Competition from prescription weight management medicines
- Meal replacement reports marginal volume growth

PROSPECTS AND OPPORTUNITIES

- Weight management and wellbeing faces ongoing competitive threats
- Plant-based trend offers scope for product development in meal replacement
- Rx obesity products will put further pressure on weight loss supplements

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Herbal/traditional products benefit from stronger levels of consumption
- Fragmented competitive landscape creates opportunities for smaller players
- Online shopping remains prevalent

PROSPECTS AND OPPORTUNITIES

- Holistic approach is to fuel demand for natural products
- Consumers will become more educated on herbal/traditional products
- Fragmented landscape will enable retail e-commerce to flourish

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 Sweden

KEY DATA FINDINGS

2024 DEVELOPMENTS

Brighter outlook for paediatric consumer health

Paediatric vitamins and dietary supplements remain a key focus for parents

Parents favour online shopping for convenience and lower prices

PROSPECTS AND OPPORTUNITIES

Modest outlook for paediatric consumer health

Private label likely to make inroads from a small base

Wider product availability to support paediatric acetaminophen

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-sweden/report.