



Euromonitor
International

Consumer Health in New Zealand

September 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

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cold and flu incidence rates up on 2023, driving growth in demand for analgesics
Supermarkets and pharmacies remain the dominant distribution channels
Inflationary pressures drive unit price growth, cost of living pressures drive growth for private label

PROSPECTS AND OPPORTUNITIES

Inflationary pressures expected to ease, unit price growth expected to slow
Impact on analgesics of pseudoephedrine regulatory changes remains uncertain
Strong brand awareness to drive continued dominance for the incumbent leaders, but the competition is increasing

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High levels of stress and anxiety lead to disrupted sleep patterns
- Sleep Drops continues to dominate sleep aids
- High local prices and regulation of melatonin see consumers purchase sleep aids directly from overseas

PROSPECTS AND OPPORTUNITIES

- Further growth expected for sleep aids, due to stress, anxiety, ageing, and gaming
- Competitive landscape expected to remain stable
- Increased competition from prescription medicines likely

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Cold and flu incidence rates are up, driving growth in demand
- Pseudoephedrine back on shelves in New Zealand
- Multinational players continue to dominate cough, cold and allergy remedies

PROSPECTS AND OPPORTUNITIES

- Increased focus on preventative health should benefit sales
- Uncertainty around impact of pseudoephedrine regulatory changes
- Sticky consumer preferences provide challenge for retail e-commerce growth

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Hair loss treatments performs well, due to population ageing and prevention
- Multinational players continue to lead dermatologicals

New Zealand mother develops world-first glow in the dark lice powder

PROSPECTS AND OPPORTUNITIES

Prospects for dermatologicals will be shaped by demographic trends
Beauty products likely to provide tough competition for dermatologicals
Social stigma of certain products likely to benefit online sales

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Poor dietary choices drive demand for digestive remedies
Inflationary pressures drive unit price growth
Reckitt Benckiser maintains its lead in digestive remedies

PROSPECTS AND OPPORTUNITIES

Healthy eating trend likely to place pressure on sales of digestive remedies
Many New Zealanders are still expected to resort to digestive remedies
Brand loyalty will remain a barrier to growth for smaller players

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Deteriorating eye health drives growth for standard eye care
Increase in outdoor activities increases demand for allergy eye care
Clear Eyes retains its leading position in eye care

PROSPECTS AND OPPORTUNITIES

Bright future predicted for eye care
Castor oil may have potential as a natural treatment for dry eyes
Effects of climate change to continue to influence eye care

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- While volume sales fall, inflationary pressures drive up unit prices
- NRT gum and NRT patches remain the most popular offerings
- Dominance of Johnson & Johnson and Dr Reddy's continues

PROSPECTS AND OPPORTUNITIES

- Sluggish performance expected, due to falling target market and lack of innovation
- E-vapour products provide challenges and opportunities
- Snuff and chewing tobacco could be legalised to help smokers quit

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increasing participation in sports, and the ageing population drive growth
- Wound care remains a highly mature category
- Pharmacies remains the dominant distribution channel

PROSPECTS AND OPPORTUNITIES

- Growth of wound care set to stabilise, although demographic trends could have a positive impact
- Competitive landscape to remain stable
- Growth prospects tied to environmental sustainability

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports protein powder remains the largest category within sports nutrition
Local dairy industry means low barriers to entry, with heavy segmentation
Sports non-protein products is the strongest performer

PROSPECTS AND OPPORTUNITIES

Inflationary pressures expected to ease, unit price growth expected to slow
Sustainability considerations will give rise to growth in plant-based protein products
Protein/energy bars expected to see the strongest performance

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dietary supplements demonstrates resilience
New formats have emerged, with gummies continuing to align with evolving consumer preferences
Growing demand for beauty and brain health supplements

PROSPECTS AND OPPORTUNITIES

Women's health set to become a central focus within dietary supplements
Vegan supplements poised for growth
Increasing prioritisation of environmental responsibility

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price rises drive value growth, while volume growth is weak amidst ongoing cost-of-living crisis
Multivitamins shifts from a generalised to a personalised approach, concentrating on specific health concerns
Vitamins embrace an enjoyable consumption experience

PROSPECTS AND OPPORTUNITIES

Anticipated recovery in demand as the cost-of-living crisis abates
Opportunity for hyperpersonalised solutions in vitamins
Vitamins is poised to encounter growing competition from functional wellness products

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Supplement nutrition drinks leads the way in terms of growth in weight management and wellbeing
- Competition from outside the category places downward pressure on growth
- Declining volume trend for meal replacement and weight loss supplements

PROSPECTS AND OPPORTUNITIES

- High obesity rate set to drive consumer demand
- Increased competition from adjacent categories expected
- Ageing population presents opportunities for supplement nutrition drinks

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Further growth for herbal/traditional products
- Local players leverage the growing consumer preference for sustainable products
- Sleep aids remains the strongest performer within herbal/traditional products

PROSPECTS AND OPPORTUNITIES

- Further gains over the forecast period, in line with growing consumer awareness and acceptance of natural remedies
- Increased competition expected as consumers gravitate towards herbal/traditional alternatives
- Herbal/traditional sleep aids expected to continue to see the strongest growth over the forecast period

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 New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflationary pressures hamper volume sales, but drive unit price growth
Vitamins and dietary supplements continues to dominate
Competitive landscape remains stable

PROSPECTS AND OPPORTUNITIES

Paediatric vitamins and dietary supplements set to drive sales and growth
Format innovation to make paediatric products more palatable
Demand for herbal/traditional and natural products set to grow

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-new-zealand/report.