Consumer Health in New Zealand

September 2024

Table of Contents

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

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

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

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

CATEGORY DATA

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

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

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

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

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