



# Consumer Health in India

November 2023

Table of Contents

## Consumer Health in India

### 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 India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pain concerns amongst Millennials elevate growth for analgesics

Physical activity drives growth for topical analgesics amongst younger consumers

Government implements measures to curb counterfeit products

#### PROSPECTS AND OPPORTUNITIES

Increasingly hectic lifestyles to drive growth in the forecast period

Ayurvedic claim to rise in topical analgesics/anaesthetic

Wide availability of analgesics online will fuel growth

### 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 India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued growth in 2023, driven by decongestants

Unseasonal rains increase instances of coughs and colds

Procter & Gamble's Vicks continues to lead with its extensive distribution

#### PROSPECTS AND OPPORTUNITIES

Natural/Ayurvedic products to gain momentum in the forecast period

Environmental problems will elevate respiratory issues

Increasing scrutiny of cough remedies might require reformulation

#### 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 India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Topical germicidals/antiseptics drives growth

Category leader Emami focuses on the D2C approach

The reliability of professionals for solving skin problems is a challenge

#### PROSPECTS AND OPPORTUNITIES

Growth expected to stabilise due to maturity of dermatologicals

Strategic pack sizes will help counter inflation

While store-based retail remains dominant, the ascent of e-commerce continues

#### 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 India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Higher instances of eating restaurant food support growth

GSK Consumer Healthcare maintains its lead, followed by Dabur

Reduced sugar product claims and new product innovations drive growth

## PROSPECTS AND OPPORTUNITIES

Competition from home remedies will continue to be a concern

E-commerce penetration set to rise, but at a slower pace

Increasing adoption of probiotics might hamper growth

## 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

## Eye Care in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising incidences of dry eyes drive moderate growth for eye care

Increasing digital entertainment options drive the need for eye care solutions

Major players are focusing on formats tailored for modern lifestyles

### PROSPECTS AND OPPORTUNITIES

Increasing uptake of contact lenses likely to benefit eye care

Increasing demand for blue light protection eyewear could offer stiff competition

Inflationary pressure might affect the category in the forecast period

## CATEGORY DATA

Table 35 - Sales of Eye Care by Category: Value 2018-2023

Table 36 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 38 - LBN Brand Shares of Eye Care: % Value 2020-2023

Table 39 - Forecast Sales of Eye Care by Category: Value 2023-2028

Table 40 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

## NRT Smoking Cessation Aids in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increasing health awareness dictates the growth of the category

Cipla remains the dominant player thanks to its trusted name and wide resources

Restricted OTC nicotine dosage limits consumer reach

### PROSPECTS AND OPPORTUNITIES

Category to benefit from increasing taxes on cigarettes in India

Wide distribution of NRT smoking cessation aids set to drive growth

Alternatives to help quit smoking might act as competition to the category

## CATEGORY INDICATORS

Table 41 - Number of Smokers by Gender 2018-2023

## CATEGORY DATA

Table 42 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 43 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 44 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 45 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 46 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 47 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

## Wound Care in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Maturity of wound care prevents dynamic growth

Transparent adhesive bandages are relatively new to the category

Focus on scalability drives volume growth

#### PROSPECTS AND OPPORTUNITIES

Increasing popularity of sports will contribute to growth

Diverse online platforms to build the e-commerce presence of wound care

Low margins will continue to be a challenge for brands

### CATEGORY DATA

Table 48 - Sales of Wound Care by Category: Value 2018-2023

Table 49 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 51 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 52 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 53 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising popularity of sports and fitness fuel demand for sports nutrition

E-commerce growth helps drive growth in sports nutrition

Brand collaborations aim to enhance consumer reach

#### PROSPECTS AND OPPORTUNITIES

Increasing “vegetarian” and “no added sugar” claims for sports nutrition

Government support for sports and fitness will boost awareness

Brands will continue to limit counterfeit products to retain consumer trust

### CATEGORY DATA

Table 54 - Sales of Sports Nutrition by Category: Value 2018-2023

Table 55 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 56 - NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 57 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 58 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 59 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Consumers are bridging nutritional gaps with dietary supplements

General health-focused dietary supplements dominate  
Brands are making efforts to expand their reach amongst younger consumers

#### PROSPECTS AND OPPORTUNITIES

Wide total addressable market likely to benefit growth of the category  
Promising future to attract fmcg companies to explore the space  
Counterfeit products remain a challenge for the industry

#### CATEGORY DATA

Table 60 - Sales of Dietary Supplements by Category: Value 2018-2023  
Table 61 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023  
Table 62 - Sales of Dietary Supplements by Positioning: % Value 2018-2023  
Table 63 - NBO Company Shares of Dietary Supplements: % Value 2019-2023  
Table 64 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023  
Table 65 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028  
Table 66 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

### Vitamins in India

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Vitamins continues to record a stable performance  
Availability of new formats for vitamins creates interest  
Convenience and cost-effectiveness drive the popularity of multivitamins

#### PROSPECTS AND OPPORTUNITIES

The changing economic landscape, coupled with growing preventive care, to support forecast growth  
E-commerce to become an important channel for growth  
Functional foods and beverages might interfere with the growth of vitamins

#### CATEGORY DATA

Table 67 - Sales of Vitamins by Category: Value 2018-2023  
Table 68 - Sales of Vitamins by Category: % Value Growth 2018-2023  
Table 69 - Sales of Multivitamins by Positioning: % Value 2018-2023  
Table 70 - NBO Company Shares of Vitamins: % Value 2019-2023  
Table 71 - LBN Brand Shares of Vitamins: % Value 2020-2023  
Table 72 - Forecast Sales of Vitamins by Category: Value 2023-2028  
Table 73 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

### Weight Management and Wellbeing in India

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Double-digit value growth as consumers seek assistance for weight loss  
Herbalife strengthens its share in weight management  
Meal replacement thriving within weight management and wellbeing

#### PROSPECTS AND OPPORTUNITIES

The health and wellness trend will drive growth in the forecast period  
Dieticians and nutritionists likely to influence purchasing decisions  
Antioxidant claims rising for weight management products

#### CATEGORY DATA

Table 74 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 75 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 76 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 77 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 78 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 79 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

## Herbal/Traditional Products in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Herbal/traditional dietary supplements displays double-digit value growth

Seasonality plays a significant role in herbal/traditional cough, cold and allergy remedies

Dabur retains its lead with a focus on innovation, followed closely by Emami

### PROSPECTS AND OPPORTUNITIES

Threat to herbal/traditional products from traditional home remedies

Elevated consumer awareness of the need to maintain a healthy lifestyle will benefit the category

Competition from non-herbal products due to faster relief claims

### CATEGORY DATA

Table 80 - Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 81 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 82 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 83 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 84 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 85 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

## Paediatric Consumer Health in India

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Parents' concern about their children's nutrition fuels demand

Expanding product reach beyond urban areas is still a challenge

Return of mobility drives growth for nappy (diaper) rash treatments

### PROSPECTS AND OPPORTUNITIES

Natural claims offer high potential for paediatric vitamins and dietary supplements

Novel supplement formats likely to see increased adoption

With positive outlook, companies launch products and offer different features

### CATEGORY DATA

Table 86 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 87 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 88 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 89 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 90 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 91 - 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-india/report](http://www.euromonitor.com/consumer-health-in-india/report).