

# Consumer Health in North Macedonia

October 2024

**Table of Contents** 

#### Consumer Health in North Macedonia

## **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 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 North Macedonia

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Overall demand for analgesics remains solid

Adult naproxen shows the fastest development

Rising awareness of cardiac risks erodes appeal of adult ibuprofen

#### PROSPECTS AND OPPORTUNITIES

Use of analgesics will continue to increase steadily

Adult aspirin projected to be the most dynamic performer

Demand for combination products set to remain strong

## **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

## Cough, Cold and Allergy (Hay Fever) Remedies in North Macedonia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Demand remains robust despite relatively short and mild winter season Combination products is the most dynamic category

3C Pharma launches Sinuxin and Sedatuxil

# PROSPECTS AND OPPORTUNITIES

Maturity and population decline will constrain volume growth prospects

Medicated confectionery expected to grow fastest in volume and value terms

Rising health awareness should buoy demand for paediatric cough/cold remedies

#### CATEGORY DATA

- Table 18 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024
- Table 19 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024
- Table 20 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024
- Table 21 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024
- Table 22 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029
- Table 23 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

## Dermatologicals in North Macedonia

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Use of dermatologicals continues to increase steadily

Hair loss treatments grows fastest in volume and value terms

Rising incidence of scalp-related conditions boosts sales of medicated shampoos

## PROSPECTS AND OPPORTUNITIES

Overall demand for dermatologicals set to remain buoyant

Topical antifungals expected to be the best performing category

Increasing hygiene-consciousness bodes well for topical germicidals/antiseptics

## **CATEGORY DATA**

- Table 24 Sales of Dermatologicals by Category: Value 2019-2024
- Table 25 Sales of Dermatologicals by Category: % Value Growth 2019-2024
- Table 26 NBO Company Shares of Dermatologicals: % Value 2020-2024
- Table 27 LBN Brand Shares of Dermatologicals: % Value 2021-2024
- Table 28 Forecast Sales of Dermatologicals by Category: Value 2024-2029
- Table 29 Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

# Digestive Remedies in North Macedonia

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Busier lifestyles and easing of cost-of-living pressures help to lift demand

Paediatric diarrhoeal remedies is the strongest performer in value growth terms

Unhealthy eating habits continue to boost antacids sales

#### PROSPECTS AND OPPORTUNITIES

Overall demand for digestive remedies set to remain stable

Antacids and digestive enzymes projected to post strongest growth in volume sales

Laxatives set to lose out as more consumers opt for alternative natural solutions

#### CATEGORY DATA

- Table 30 Sales of Digestive Remedies by Category: Value 2019-2024
- Table 31 Sales of Digestive Remedies by Category: % Value Growth 2019-2024
- Table 32 NBO Company Shares of Digestive Remedies: % Value 2020-2024
- Table 33 LBN Brand Shares of Digestive Remedies: % Value 2021-2024
- Table 34 Forecast Sales of Digestive Remedies by Category: Value 2024-2029
- Table 35 Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

#### Wound Care in North Macedonia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Overall demand for wound care products picks up in 2024 Sticking plasters/adhesive bandages registers the most dynamic performance Rising household numbers and vehicle equipment law buoy sales of first aid kits

#### PROSPECTS AND OPPORTUNITIES

Growth potential will be limited by increasing maturity and population decline Specialised and added-value products likely to become more widely available Pharmacies expected to remain the top distribution channel

# CATEGORY DATA

- Table 36 Sales of Wound Care by Category: Value 2019-2024
- Table 37 Sales of Wound Care by Category: % Value Growth 2019-2024
- Table 38 NBO Company Shares of Wound Care: % Value 2020-2024
- Table 39 LBN Brand Shares of Wound Care: % Value 2021-2024
- Table 40 Forecast Sales of Wound Care by Category: Value 2024-2029
- Table 41 Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

# Sports Nutrition in North Macedonia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Rising participation in sports and fitness activities continues to lift demand Sports protein powder is the most dynamic performer in volume growth terms New launches help to strengthen interest in sports nutrition

## PROSPECTS AND OPPORTUNITIES

Sports nutrition retains strong potential for further expansion

Protein/energy bars expected to develop fastest in volume and value terms

Sales via other non-grocery retailers and e-commerce set to increase

# **CATEGORY DATA**

Table 42 - Sales of Sports Nutrition by Category: Value 2019-2024

Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024

Table 44 - NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 46 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

# Dietary Supplements in North Macedonia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Macedonians continue to show strong interest in dietary supplements

Focus on immune health and increasingly busy lifestyles boost ginseng sales

Combination products remain a focal point for innovation

#### PROSPECTS AND OPPORTUNITIES

Preventive health trend will continue to favour dietary supplements

Probiotic supplements set to remain among the fastest expanding categories

Co-enzyme Q10 well positioned to benefit from population ageing

#### **CATEGORY DATA**

Table 48 - Sales of Dietary Supplements by Category: Value 2019-2024

Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024

Table 50 - Sales of Dietary Supplements by Positioning: % Value 2019-2024

Table 51 - NBO Company Shares of Dietary Supplements: % Value 2020-2024

Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024

Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029

Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

#### Vitamins in North Macedonia

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Growing focus on preventive health continues to boost vitamins consumption Vitamin B shows the fastest development in volume terms

Jamieson launches new vitamin C and B-complex products

#### PROSPECTS AND OPPORTUNITIES

Demand set to remain robust despite projected slowdown in volume sales Population ageing expected to broaden appeal of vitamin D Sales via grocery retailers and e-commerce should continue to rise

## **CATEGORY DATA**

Table 55 - Sales of Vitamins by Category: Value 2019-2024

Table 56 - Sales of Vitamins by Category: % Value Growth 2019-2024

Table 57 - Sales of Multivitamins by Positioning: % Value 2019-2024

Table 58 - NBO Company Shares of Vitamins: % Value 2020-2024

Table 59 - LBN Brand Shares of Vitamins: % Value 2021-2024

Table 60 - Forecast Sales of Vitamins by Category: Value 2024-2029

Table 61 - Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

# Weight Management and Wellbeing in North Macedonia

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Buoyant demand underpinned by rising health- and image-consciousness Supplement nutrition drinks is the most dynamic category Natura Therapy launches meal replacement brand Diet Shake

#### PROSPECTS AND OPPORTUNITIES

Maturity and embrace of natural weight loss methods will restrict growth prospects Slimming teas expected to show the fastest development Further distribution gains anticipated for e-commerce

#### **CATEGORY DATA**

- Table 62 Sales of Weight Management and Wellbeing by Category: Value 2019-2024
- Table 63 Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
- Table 64 NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
- Table 65 LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
- Table 66 Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
- Table 67 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

#### Herbal/Traditional Products in North Macedonia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Overall demand bolstered by concerns about active pharmaceutical ingredients Interest in herbal/traditional paediatric dietary supplements remains strong Use of herbal/traditional dermatologicals continues to rise

## PROSPECTS AND OPPORTUNITIES

Demand for herbal/traditional products set to grow steadily

Gut microbiota concerns will buoy sales of herbal/traditional digestive remedies

Interest in herbal/traditional sleep aids expected to increase

#### **CATEGORY DATA**

- Table 68 Sales of Herbal/Traditional Products: Value 2019-2024
- Table 69 Sales of Herbal/Traditional Products: % Value Growth 2019-2024
- Table 70 NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024
- Table 71 LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024
- Table 72 Forecast Sales of Herbal/Traditional Products: Value 2024-2029
- Table 73 Forecast Sales of Herbal/Traditional Products: % Value Growth 2024-2029

# Paediatric Consumer Health in North Macedonia

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Rising health awareness and self-medication trend support stable demand Paediatric vitamins and dietary supplements is the strongest performer Demand for paediatric diarrhoeal remedies picks up in 2024

## PROSPECTS AND OPPORTUNITIES

Falling birth rates will restrict growth potential

Paediatric cough/cold remedies projected to be the most dynamic category

Concerns about health risks will continue to limit appeal of paediatric ibuprofen

# CATEGORY DATA

Table 74 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 77 - 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 focusing 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-north-macedonia/report.