



# Consumer Health in Spain

September 2024

Table of Contents

## Consumer Health in Spain

### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Fewer viruses and consumers opting for Rx lead to low positive sales

Negative reports surrounding Nolotil help boost sales of other analgesics

Brand rankings remain unchanged amid new product launches

### PROSPECTS AND OPPORTUNITIES

Steady growth anticipated for the forecast years, thanks to baseline demand

Segmentation activity will continue to focus on sport-related injuries, but there are other areas to explore

New strategy to address supply shortages expected to help forecast 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

“Sleep Europe” comes to Seville in Spain, co-hosted by the Spanish Sleep Society

Format innovations help to drive performance in sleep aids

Esteve maintains its lead and innovates to stay ahead of rising competition from natural products

### PROSPECTS AND OPPORTUNITIES

Stressful lifestyles will continue to create sleep disorders

New launches set to be based on herbal ingredients

Segmentation provides another area to explore

### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Sales slightly suppressed by low incidences of illness and competition from other areas

Concerns surrounding pseudoephedrine are not impacting performance in Spain

Competitive status quo remains the same, while we see new herbal formula launches

### PROSPECTS AND OPPORTUNITIES

Baseline demand will continue, although the pseudoephedrine issue could still have an impact

Growing number of herbal and vitamin and supplement launches create competition

Competition from generics unlikely in cough, cold and allergy (hay fever) remedies

### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Competition from other categories impacts sales, although performance remains positive

Hair loss treatments notably challenged

Fragmented category with leading subcategory players maintaining their status quo

## PROSPECTS AND OPPORTUNITIES

Economic uncertainty will continue to have an impact on sales  
Categories related to travel and fun expected to perform better  
Competition from other categories and industries will continue

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Improving education about the link between intestinal health and overall health supports sales  
Rising prevalence of probiotics and prebiotics create competition for traditional remedies  
Almax maintains its lead thanks to strong reputation and affordable price point

### PROSPECTS AND OPPORTUNITIES

Growing prevalence of digestive issues expected to drive growth over the forecast period  
Herbal ranges set to grow in importance over the forecast period  
Tourism and travel expected to be additional drivers 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Eye care's performance remains consistent, with sales slightly stronger than last year  
Ongoing use of digital devices will continue to cause eye conditions  
Ophthalmologist recommendation helps consolidate Théa's position

### PROSPECTS AND OPPORTUNITIES

Spanish health authorities to place a greater focus on eye health  
Opportunities for innovation with targeted products  
Competition from eye health supplements will continue

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Tougher laws on smoking could support modest growth for a sluggish category

Smoking cessation is a top priority for the health authorities

A consolidated category with a stable competitive status quo

#### PROSPECTS AND OPPORTUNITIES

Ongoing efforts from the Spanish health authorities will continue to suppress potential OTC sales

Further EU efforts add further pressure on consumers to stop smoking

Vaping also set to be threatened by new legislations

#### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Small positive growth due to basic demand in fairly uninteresting category

Launches targeted at key demographics of children and blister sufferers

Compeed boosts its leadership with its own line extensions

#### PROSPECTS AND OPPORTUNITIES

Small and stable growth expected, with a focus on key areas

Wound care players target acne treatments for additional growth and opportunity

Sustainability trends set to influence developments in wound care

#### 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 Spain

### KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Growing consumer base of health-focussed consumers boosts sales  
Brands expand their offers past traditional formats and flavours  
Popular category attracts new launches from both local and global players

## PROSPECTS AND OPPORTUNITIES

Healthy lifestyles will continue to support sales in sports nutrition  
A stronger focus on the female consumer base expected  
Competition expected to intensify further over the forecast period

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Dietary supplements is a winner, thanks to growing success of products in the category  
Products positioned for beauty and gut health are in strong demand  
Brand share remains extremely fragmented, with the highest percentage held by unnamed "others"

#### PROSPECTS AND OPPORTUNITIES

Dietary supplements set to lead the way in blurring lines between categories and industries with crossover products  
Social media will remain key in attracting consumers  
Women's health provides a source of inspiration for new product developments

#### 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Growing education about holistic and preventative health supports vitamins  
Dietary supplements hinder a stronger performance from vitamins  
Bayer maintains its company lead, while Haleon's Centrum holds top brand place

#### PROSPECTS AND OPPORTUNITIES

Vitamins will continue to enjoy sales, while facing ongoing competition from dietary supplements  
Players expected to focus on healthy ageing to promote targeted vitamins  
Single vitamins retain further growth prospects

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Consumers want an easy approach to weight loss, something the category does not offer

Growing availability of products outside the OTC space further suppresses sales

Herbalife maintains its strong lead, despite an eroding share due to crossover competition

### PROSPECTS AND OPPORTUNITIES

An overweight population provides opportunities for brands

Competition from "magic pills" and Rx will continue over the coming years

Women's health and menopause continue to be key areas of focus

## 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 Spain

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Herbal products gaining acceptance among local consumers

The gummy format proves to be popular

Use of CBD continues to attract attention

### PROSPECTS AND OPPORTUNITIES

Steady growth anticipated across forecast years

Growing focus on beauty-inspired launches

Gut health presents another area of growth opportunities

## 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 Spain

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Paediatric consumer health manages small positive growth midst declining birth rates

Innovation focuses on in-demand categories

Daisy maintains its lead, as the only brand holding a double-digit share

### PROSPECTS AND OPPORTUNITIES

Declining birth rates will continue to suppress potential sales

Professional accreditations could benefit brand image

Growing prevalence of vaccines may further impact sales

### 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-spain/report](http://www.euromonitor.com/consumer-health-in-spain/report).