



Consumer Health in Bulgaria

October 2023

Table of Contents

Consumer Health in Bulgaria

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 Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Market maturity leaves little room for development and innovation

Self-medicating trend continues spreading among consumers

Widespread advertising campaigns remain a driving force for sales

PROSPECTS AND OPPORTUNITIES

E-commerce to continue gaining popularity among consumers over the forecast period

Development of non-opioid analgesics possibly leading to changes in the market over the forecast period

Ageing population and longer life expectancy to support sales over the forecast period

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

Sleep Aids in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stressful busy lifestyles boost demand
Surge in sleeping disorders supports sales
E-commerce to continue developing

PROSPECTS AND OPPORTUNITIES

CBD products likely to gain in popularity among younger demographics
Shift towards natural products to reshape consumer preferences
Consequences of urbanisation to sustain demand over the forecast period

CATEGORY DATA

Table 17 - Sales of Sleep Aids: Value 2018-2023

Table 18 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 19 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 20 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 21 - Forecast Sales of Sleep Aids: Value 2023-2028

Table 22 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

Cough, Cold and Allergy (Hay Fever) Remedies in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price sensitivity and self-medication support sales growth
Seasonality of demand boosts sales growth over colder months
Pharmacies remains main distribution channel despite development of e-commerce

PROSPECTS AND OPPORTUNITIES

Increase in outdoor activities to benefit sales
Longer allergy seasons and increased amount of pollen to boost demand over the forecast period
Natural products to alter consumer preferences

CATEGORY DATA

Table 23 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 25 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 26 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 27 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

Dermatologicals in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sedentary lifestyles support steady growth
Ageing population maintains demand
Consumers turn to online retailing

PROSPECTS AND OPPORTUNITIES

Spreading self-medication trend to boost demand over forecast period

Natural products growing more popular among consumers

Demographic trend of decreasing birth rate to slow down growth of nappy (diaper) rash treatment products

CATEGORY DATA

Table 29 - Sales of Dermatologicals by Category: Value 2018-2023

Table 30 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 31 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 32 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 33 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 34 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 35 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

Digestive Remedies in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heavy advertising continues to support sales

Traditional heavy diet and sedentary lifestyle of older generations support high demand

No-spa benefits from dual focus on female consumers and young people

PROSPECTS AND OPPORTUNITIES

Growing popularity of probiotics to hinder sales growth

Growing number of health conscious consumers likely to decrease demand

E-commerce expected to continue to gain popularity among consumers

CATEGORY DATA

Table 36 - Sales of Digestive Remedies by Category: Value 2018-2023

Table 37 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 38 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 39 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 40 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 41 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

Eye Care in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Market maturity limits growth opportunities

Ageing population supports steady increase in demand

Alcon Laboratories retains lead, while the pharmacies channel continues to dominate distribution

PROSPECTS AND OPPORTUNITIES

Prevalence of digital lifestyles to boost demand over the forecast period

Increase in eye health awareness to sustain growth

E-commerce expected to continue its expansion

CATEGORY DATA

Table 42 - Sales of Eye Care by Category: Value 2018-2023

Table 43 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 44 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 45 - LBN Brand Shares of Eye Care: % Value 2020-2023

Table 46 - Forecast Sales of Eye Care by Category: Value 2023-2028

Table 47 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

NRT Smoking Cessation Aids in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Smoking culture decreases demand

Lack of public anti-smoking campaigns leads to decline in volume sales

Johnson & Johnson dominates

PROSPECTS AND OPPORTUNITIES

E-commerce likely to grow despite category's decreasing popularity

Increased respiratory tract health awareness following the COVID-19 pandemic likely to sustain demand

Growing popularity of vaping diminishes growth potential

CATEGORY INDICATORS

Table 48 - Number of Smokers by Gender 2018-2023

CATEGORY DATA

Table 49 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 50 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 51 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 52 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 53 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

Wound Care in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Re-engaging in outdoor activities leads to recovery of sales

Regulations for car safety support demand

Brick and mortar stores remain preferred distribution channels over e-commerce

PROSPECTS AND OPPORTUNITIES

Consumers likely to shift toward eco-friendly options

Expanding range of distribution channels to boost growth over the forecast period

Innovation required to stand out in a mature market

CATEGORY DATA

Table 55 - Sales of Wound Care by Category: Value 2018-2023

Table 56 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 57 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 58 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 59 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 60 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

Sports Nutrition in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Multinationals remain the leading players

E-commerce continues to grow

Social media trends boost demand for creatine

PROSPECTS AND OPPORTUNITIES

Positive outlook for sports nutrition over the forecast period

Growing fitness culture predicted to support growth

Dietary trends to reshape the market

CATEGORY DATA

Table 61 - Sales of Sports Nutrition by Category: Value 2018-2023

Table 62 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 63 - NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 64 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 65 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 66 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

Dietary Supplements in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Probiotic supplements benefit from growing awareness, while magnesium remains popular

Dietary supplements category sees demand supported by social media

Fragmented competitive landscape creates need for regular product launches

PROSPECTS AND OPPORTUNITIES

E-commerce expected to continue expansion

Diversification of product offerings anticipated to fuel competition

Growing awareness of preventive measures to generate increase in demand

CATEGORY DATA

Table 67 - Sales of Dietary Supplements by Category: Value 2018-2023

Table 68 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 69 - Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 70 - NBO Company Shares of Dietary Supplements: % Value 2019-2023

Table 71 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023

Table 72 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 73 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

Vitamins in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and wellness trend continues to sustain sales growth

Demand grows as a result of vitamin D deficiency epidemic

Enduring demand for multivitamins, but growing awareness of role of particular single vitamins

PROSPECTS AND OPPORTUNITIES

Trend of personalisation expected to alter consumer preferences

Steady growth in sales expected over the forecast period

E-commerce to continue benefiting from health and wellness trend

CATEGORY DATA

Table 74 - Sales of Vitamins by Category: Value 2018-2023

Table 75 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 76 - Sales of Multivitamins by Positioning: % Value 2018-2023

Table 77 - NBO Company Shares of Vitamins: % Value 2019-2023

Table 78 - LBN Brand Shares of Vitamins: % Value 2020-2023

Table 79 - Forecast Sales of Vitamins by Category: Value 2023-2028

Table 80 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

Weight Management and Wellbeing in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales growth facilitated by social media

Busy lifestyles support demand

Weight loss supplements a leading category in the market

PROSPECTS AND OPPORTUNITIES

Increase in obesity among adults to drive demand over the forecast period

Meal replacements anticipated to experience fast growth over the forecast period

Growing fitness culture among young demographics to boost demand

CATEGORY DATA

Table 81 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 82 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 83 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 84 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 85 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

Herbal/Traditional Products in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Healthy living trend to continue supporting market expansion

Growing awareness boosting self-medication trend

Category benefits from trust in traditional medicine

PROSPECTS AND OPPORTUNITIES

E-commerce expected to provide opportunities for new market entrants

Urban lifestyles to support demand, with women more likely to purchase herbal/traditional products

Shift toward natural products to boost demand over the forecast period

CATEGORY DATA

Table 87 - Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 88 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 89 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 90 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 91 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

Paediatric Consumer Health in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Preference for child specific products
Store-based pharmacies remains the dominant channel
Consumer awareness speeds up shift toward natural products

PROSPECTS AND OPPORTUNITIES

Increasing number of allergies to boost demand for paediatric cough, cold, and allergy (hay fever) remedies
Online platforms offer opportunities for market expansion
Demographic trends set to present an obstacle to category development

CATEGORY DATA

Table 93 - Sales of Paediatric Consumer Health by Category: Value 2018-2023
Table 94 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023
Table 95 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023
Table 96 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023
Table 97 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028
Table 98 - 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-bulgaria/report.