

Consumer Health in Mexico

October 2023

Table of Contents

Consumer Health in Mexico

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 - Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 - Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 - 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 Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

"Tripledemic" in early 2023 boosts sales of analgesics

Effectiveness and cost-efficiency are the key drivers behind Mexicans' preference for acetaminophen

Bayer benefits from positioning Flanax as suitable for exercise-related muscle pain

PROSPECTS AND OPPORTUNITIES

Post-pandemic self-medication trend will drive future growth of analgesics

CBD has the potential to shape future use of topical analgesics

Focus on affordability in the face of a cost-of-living crisis

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2018-2023

Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 - Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

Sleep Aids in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mexicans' fragile mental health since the pandemic contributes to poor sleeping habits

A wide range of products to address various needs

Nyquil Z takes sleep aids by storm in Mexico

PROSPECTS AND OPPORTUNITIES

Mexicans' mental health will remain one of the key factors driving demand for sleep aids

CBD offers interesting possibilities in the realm of sleep aids

Diphenhydramine set to displace melatonin and herbal/traditional products

CATEGORY DATA

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

Table 19 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

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

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

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

KEY DATA FINDINGS

2023 DEVELOPMENTS

2023's "triple-demic" is a key growth driver for the category in Mexico

A deteriorating environment reflects negatively on Mexicans' respiratory systems

Brand growth depends on effective strategies, rather than only situational factors

PROSPECTS AND OPPORTUNITIES

Post-pandemic means more frequent self-treatment at home

Brands must differentiate through product segmentation and innovation

Private label offers growth potential in a challenging economic environment

CATEGORY DATA

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

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

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

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

Dermatologicals in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Previous stockpiling constrains stronger demand for some dermatologicals

Dermocosmetics indirectly compete with dermatologicals

Spotlight on vaginal health without taboos

PROSPECTS AND OPPORTUNITIES

Surprises are unlikely over the forecast period

Haemorrhoids are a recurring issue for Mexicans

Smaller families and declining birth rates set to affect demand for some dermatologicals

CATEGORY DATA

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

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

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

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

Digestive Remedies in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism boosts sales of digestive remedies in a very particular way

Heatwaves affect Mexicans' digestive systems due to food spoilage

PROSPECTS AND OPPORTUNITIES

Mexicans are culturally bound to digestive remedies

Anxiety and stress plague younger Mexicans

Digital marketing will increasingly drive sales

CATEGORY DATA

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

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

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

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

Eye Care in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation impacts demand for eye care due to rising price-sensitivity

Counterfeit products are a challenge for OTC eye care

Laboratorios Sophia retains its convincing lead due to strong consumer trust

PROSPECTS AND OPPORTUNITIES

Eye care appeals to a niche consumer segment in Mexico

Limited innovation in eye care ingredients or formats hinders stronger growth

Relevant drivers of demand or long-term development opportunities?

CATEGORY DATA

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

Table 44 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 46 - LBN Brand Shares of Eye Care: % Value 2020-2023

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

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

NRT Smoking Cessation Aids in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Perrigo remains the champion in a declining category
- Electronic Nicotine Delivery Systems an increasing threat for NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

- The range of NRT presentations in Mexico can be expanded
- E-vapour products not the only alternative to NRT smoking cessation aids
- Uncertainty in the tobacco industry reflected in demand for NRT smoking cessation aids

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2018-2023

CATEGORY DATA

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

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

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

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

Wound Care in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Despite several years of post-pandemic normality and activity, demand for wound care continues to decline
- For Mexicans, natural disasters are always looming
- Brands play to their strengths to remain relevant, while private label benefits from lower prices

PROSPECTS AND OPPORTUNITIES

- Wound care is a mature category with few avenues for growth
- Birth rates are dropping, reducing major target audience
- Branded wound care to focus on offering higher value for each product

CATEGORY DATA

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

Table 57 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Wound Care: % Value 2020-2023

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

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

Sports Nutrition in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mexicans' increasing interest in exercise supports demand for sports nutrition
GNC benefits from strong distribution as leading brand, while competitors must rely on differentiation to gain share
E-commerce strengthens penetration of sports nutrition

PROSPECTS AND OPPORTUNITIES

As interest in sports and health consciousness grows, consumers will increasingly seek more specialised sports nutrition
Sports non-protein products to gain further popularity, supported by greater availability
Sustainable sports nutrition set to gain further momentum

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2018-2023
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2019-2023
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

Dietary Supplements in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mexicans review priorities, favouring leisure expenses over dietary supplements in a tight economic environment
Sales performance varies between main dietary supplements
Direct sellers continue to lose ground within dietary supplements

PROSPECTS AND OPPORTUNITIES

Influencers change the marketing landscape of dietary supplements
New ingredients can take dietary supplements into the future
Biohacking could revamp demand for dietary supplements over forecast period

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2018-2023
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2018-2023
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2019-2023
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

Vitamins in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers shift from prevention to reaction
Differentiation is the key to survival in a maturing category
Private label retains a notable presence in vitamins

PROSPECTS AND OPPORTUNITIES

Interest in preventive health is set to return over the forecast period
Vitamins increasingly becomes a space focused on both health and beauty
E-commerce will continue to penetrate vitamins in the coming years

CATEGORY DATA

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

Table 76 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 77 - Sales of Multivitamins by Positioning: % Value 2018-2023

Table 78 - NBO Company Shares of Vitamins: % Value 2019-2023

Table 79 - LBN Brand Shares of Vitamins: % Value 2020-2023

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

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

Weight Management and Wellbeing in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Setbacks suffered by key direct sellers significantly impact category sales

Supplement nutrition drinks remains relevant, catering for specific nutritional needs

"Miracle products" taint the reputation of weight management and wellbeing

PROSPECTS AND OPPORTUNITIES

Mexicans increasingly willing to lose weight through exercise and nutrition

Nutritional guidance and access to gyms are more accessible than ever

Direct sellers must improve communication with consumers to recover momentum

CATEGORY DATA

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

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

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

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

Herbal/Traditional Products in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Interest in herbal/traditional products rooted in the cultural relevance of Mexico's traditional medicine

Slowing demand for dietary supplements overall is reflected in herbal/traditional space

Herbal/traditional cough, cold and allergy remedies growing due to popularity of medicated confectionary

PROSPECTS AND OPPORTUNITIES

Effects of COVID-19 will linger over forecast period, altering the dynamics of herbal/traditional products

Brand innovation will be fundamental in driving sales within a saturated environment

Organic ingredients will be increasingly sought after over the forecast period

CATEGORY DATA

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

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

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

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

Paediatric Consumer Health in Mexico

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sixth wave of COVID-19 converges with flu and cold season to boost paediatric analgesics and cough/cold remedies

Decreasing birth rates and inflation are key factors hampering growth of nappy (diaper) rash treatments

Trust in brands and retailers is fundamental for parents when buying paediatric consumer health products

PROSPECTS AND OPPORTUNITIES

Mexico's declining birth rate to hamper stronger growth potential

Parents' concern over their children's nutrition will drive demand for paediatric vitamins and dietary supplements

Spikes in respiratory diseases among children will likely subside

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 - 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-mexico/report.