



Consumer Health in Norway

September 2023

Table of Contents

Consumer Health in Norway

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand due to various favourable factors during the post-pandemic era

Acetaminophen and ibuprofen remain the most popular categories of analgesics

Wide distribution allows for a strong showing for e-commerce in analgesics

PROSPECTS AND OPPORTUNITIES

A positive performance ahead for analgesics at a time of rising stress levels

Topical analgesics/anaesthetic slated for a strong and steady performance

Innovation set to remain a minor consideration for the leading brands of analgesics

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consistently positive sales growth as rising stress levels underpin rising demand

The ageing of Norway's population favourable for sales of sleep aids

Herbal/traditional sleep aids the only options available OTC

PROSPECTS AND OPPORTUNITIES

Moderate positive growth ahead for sleep aids amidst rising stress levels

Rise of e-commerce unlikely to challenge dominance of pharmacies and direct selling

Stigma surrounding anxiety and insomnia set to dissipate, benefiting sleep aids

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady sales growth for the largest OTC category due to the return of social lives

Slower growth for some categories in 2023 after a particularly strong showing in 2022

Antihistamines/allergy remedies bounces back in 2023 after sales slump in 2022

PROSPECTS AND OPPORTUNITIES

A modest performance ahead due to saturation and maturity

The longer allergy season set to support demand for antihistamines/allergy remedies

Medicated confectionery set to remain a huge and rather anomalous category

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive sales growth for dermatologicals as demand for core products remains inelastic

Antiparasitics/lice (head and body) treatments rebounds from previous sales slump

Stable growth for antipruritics, the most popular category of dermatologicals in Norway

PROSPECTS AND OPPORTUNITIES

Reduced stigma surrounding the use of dermatologicals set to spur demand
Sales set to receive a boost from consumers spending more time outdoors
The rise of premium beauty and personal care products that mimic 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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Diarrhoeal remedies and motion sickness remedies thrive during the post-pandemic era
Reintroduction of famotidine-based histamines boosts the performance of H2 blockers
Greater attention to diet and hygiene undermines demand for digestive remedies

PROSPECTS AND OPPORTUNITIES

Lifestyle trends expected to remain relatively unfavourable to digestive remedies
Norway's ageing population presents opportunities for sales growth in key categories
Pharmacies to continue dominating distribution as e-commerce continues to develop

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further stable and steady growth for eye care due to the impact of lifestyle habits
2023 sees allergy eye care return to positive growth after mild allergy season in 2022
The ageing of the Norwegian population creates opportunities for eye care

PROSPECTS AND OPPORTUNITIES

Rising amounts of screen time in daily life to continue supporting demand for eye care
The warming of the climate set to extend and intensify annual pollen allergy seasons
Advances in eye surgery, corrective eyewear and optical goods to put pressure on sales

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lingering concerns about the negative impact of smoking supports sales growth in 2023

NRT smoking cessation aids in danger of becoming a victim of its own success

The presence of snus presents competition to NRT cessation aids

PROSPECTS AND OPPORTUNITIES

Smoking's negative image and shift towards holistic health to support sales growth

E-Commerce a more dynamic distribution channel for NRT smoking cessation aids

Consolidation and high barriers to entry make the emergence of new players unlikely

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive growth continues as the return to regular daily routines makes injury more likely

The famous Norwegian love of the great outdoors supports demand for wound care

Orkla Group maintains leadership in wound care via Norgesplaster and Salvequick

PROSPECTS AND OPPORTUNITIES

The return to the great outdoors to continue promoting the use of wound care

Maturity and essential nature of wound care render innovation less relevant

Few changes expected in distribution or competitive environment in wound care

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consistently positive growth as the post-pandemic exercise trend continues to build
Protein/energy bars benefits from demand for convenience among busy consumers
The high-protein diet trend presents challenges and opportunities to sports nutrition

PROSPECTS AND OPPORTUNITIES

Sports nutrition to benefit from rising interest in exercise and convenience
E-Commerce set to remain the dominant distribution channel for sports nutrition
Sports non-protein products slated for positive growth due to rising consumer interest

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

A much more consistent performance in dietary supplements than in vitamins
A handful of dynamic categories are driving overall sales growth in dietary supplements
Scepticism about the effectiveness of dietary supplements undermines sales growth

PROSPECTS AND OPPORTUNITIES

Stability and steady growth to define dietary supplements over the forecast period
Products with a beauty-enhancing positioning set to generate stronger demand
Dietary supplements that target vegans likely to gain ground over the 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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales declines continue as the category adjusts after booming during the pandemic
Single vitamins continue to dominate sales as consumers prefer a targeted approach
E-Commerce continues to develop into a major distribution channel for vitamins

PROSPECTS AND OPPORTUNITIES

Steady rather than spectacular growth expected as questions over efficacy remain
Demographic changes and heightened health awareness to support sales growth
Innovation and new product development to drive demand during the forecast period

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Long-term sales decline continues as consumers returned to pre-pandemic habits

E-Commerce gains ground in a relatively fragmented distribution landscape

Slimming teas is an underdeveloped category that holds huge promise

PROSPECTS AND OPPORTUNITIES

Weight management and wellbeing set to remain out-of-step with current diet trends

The strong position of direct selling to contribute to the category's challenges

High and rising obesity rate could present opportunities for innovative players

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand pushes sales growth across most herbal/traditional category in 2023

Herbal/traditional sleep aids records robust growth as rising stress levels boost demand

General scepticism towards herbal/traditional products places limits on demand

PROSPECTS AND OPPORTUNITIES

Herbal/traditional products slated for a modest sales performance

Preference for OTC and Rx medicines to limit demand for herbal/traditional products

E-Commerce set to grow as it emerges into a mainstream distribution channel

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 Norway

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales trends in 2023 determined largely by performance at the height of the pandemic
Sales remain relatively low outside of paediatric vitamins and dietary supplements
Demand for paediatric vitamins and dietary supplements supported by informational campaigns

PROSPECTS AND OPPORTUNITIES

Slow growth ahead due to low birth rate and preference for general products
E-Commerce slated for further growth in the distribution of paediatric consumer health
New products likely to be seen as innovation remains crucial to success

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-norway/report.