



Consumer Health in Singapore

October 2023

Table of Contents

Consumer Health in Singapore

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Topical analgesics/anaesthetic is the top-performing category, while growth for systemic analgesics eases

Increased travel enables rebound for herbal/traditional topical analgesics/anaesthetic

GSK Consumer Healthcare continues to lead analgesics

PROSPECTS AND OPPORTUNITIES

Evolving demographics will enable stable growth in topical analgesics/anaesthetic

Systemic analgesics likely to continue to see a slowdown, due to lower threat from COVID-19

Concerns surrounding transparency and clear brand communication for herbal/ traditional products may hamper growth

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Subject of immunity sparks consumers' interest in sleep sufficiency

Melatonin and vitamin B6 remain the most popular ingredients for sleep aids

Preference for herbal/traditional formulations increases in sleep aids

PROSPECTS AND OPPORTUNITIES

Rise in cases of sleep apnoea may limit demand for sleep aids

Consumers may find better sleep with multipurpose vitamins and dietary supplements

Growing interest in mental health may resolve sleep problems holistically

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth in cough, cold and allergy (hay fever) remedies eases as the threat of COVID-19 abates

Throat spray becomes an increasingly popular format in pharyngeal preparations

Inconsistent air quality increases the use of nasal sprays

PROSPECTS AND OPPORTUNITIES

Expectation of normalisation of sales as COVID-19 becomes endemic

Increasing consumer awareness of allergies will drive growth for antihistamines/ allergy remedies

Desire for natural remedies predicts continued growth for the mature medicated confectionery 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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rebound for hair loss treatments and medicated shampoos as people return to life outside the home

Antipruritics sees growth, but remains a niche, and experiences a threat from local customisable skin care brands

Private label sales slow, along with the slowdown in topical germicidals/antiseptics

PROSPECTS AND OPPORTUNITIES

Emerging awareness of reproductive health sets the stage for growth in vaginal antifungals

Interest in skin supplements and skin detox teas may reduce reliance on antipruritics

Changing shopping patterns boost online demand for dermatologicals brands

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reduced outdoor dining regulations drive growth in demand for indigestion and heartburn remedies

Focus on preventive health increases demand for vitamins over digestive remedies

PROSPECTS AND OPPORTUNITIES

Increasingly sophisticated weight management products may pose a competitive threat

Interest in probiotics will continue to suppress demand for digestive remedies

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing demand for standard eye care products due to rising screen use

Allergy eye care driven by rising awareness of allergies

PROSPECTS AND OPPORTUNITIES

Options for long-term approach to eye health increase, with digital initiatives

Eye health supplements set to limit growth in standard eye care

Competitive landscape in allergy eye care likely to become increasingly consolidated

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lifting of COVID-19 outdoor restrictions leads to polarisation
Government regulations on smoking serve to limit smoking rate
Public service campaigns encourage the use of NRT products to quit smoking

PROSPECTS AND OPPORTUNITIES

Role of NRT smoking cessation aids uncertain amidst the possibility of a smoking cohort ban
Large pharmaceutical companies set to maintain their leading positions

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

End to home seclusion leads to more demand for wound care products
Wound care products marketed as an easy add-on product via retail e-commerce

PROSPECTS AND OPPORTUNITIES

Innovations in advanced wound care may inspire future innovations in traditional wound care
Education on wound care to be driven by pharmaceutical companies

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sports protein products remain most popular in sports nutrition
Sports non-protein products sees stronger growth as local awareness of hydration grows
Perceived low cost of entry to sports nutrition leads to new entrants

PROSPECTS AND OPPORTUNITIES

Plant-based protein will be a strong growth driver
Growth in unit prices expected to slow over the forecast period
Sports protein RTD to benefit from blurring wellness concepts

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dietary supplements continues to see solid value growth in Singapore
Gut health remains at the forefront of consumer consciousness
Alternative sweeteners increase in prevalence amidst increasing health consciousness

PROSPECTS AND OPPORTUNITIES

Plant-based/natural ingredient formulations have become more pervasive
Beauty-positioned supplements set to grow quickly in Singapore
Mental health supplements likely to grow faster 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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vitamins continues to record a stable performance in 2023, with multivitamins inching out growth in single vitamins
Single vitamins continue to compete on price points and provenance
Transparency and proven product efficacy will become stronger themes in vitamins

PROSPECTS AND OPPORTUNITIES

Vitamins will continue to experience stable growth, given demographic needs
Multifunctional product trend means players will need to adapt in single vitamins
Sales of vitamin C expected to slow despite continued concern for immune health

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Supplement nutrition drinks sees the most dynamic growth in 2023, although meal replacement remains highly popular

Global inflation places additional price pressure on players

Senna seen as a common and effective ingredient for weight management in slimming teas

PROSPECTS AND OPPORTUNITIES

Alongside slimming teas, manufacturers experiment with RTDs to complement their weight management product ranges

Personalisation to become an even stronger trend as product efficacy comes under consumer scrutiny

Domestic e-commerce set to grow, while cross-border e-commerce will continue to negatively impact licensed distributors

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Most categories within herbal/traditional products grow at a slower rate in volume terms

Gradual recovery of tourism drives sales in herbal/traditional topical analgesics

Habit persistence in herbal/traditional products paves the way for more extensive retail distribution in Singapore

PROSPECTS AND OPPORTUNITIES

Evolving demographic needs will enable stable growth for herbal/traditional topical analgesics

Uncertainty in recovery of arrivals from China predicts more stable growth

More transparency and communication necessary to ensure consumer loyalty

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 Singapore

KEY DATA FINDINGS

2023 DEVELOPMENTS

Local brands gain prominence in paediatric consumer health due to effective targeting

Drops gaining traction due to perceived versatility, but gummies remain popular

GSK Consumer Healthcare leverages extensive distribution to strengthen its lead

PROSPECTS AND OPPORTUNITIES

Alternative sweeteners may grow in popularity due to parental concerns regarding sugar intake

Lack of eye care supplements for children offers growth opportunities

Further potential for effervescent vitamins and dietary supplements targeting children

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-singapore/report.