



Consumer Health in Ukraine

October 2024

Table of Contents

Consumer Health in Ukraine

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Analgesics on the slow path to recovery

Competition remains stiff in analgesics backed by strong advertising support

Darnitsa remains on top thanks to the good value proposition of its generics

PROSPECTS AND OPPORTUNITIES

Category maturity and the reduced size of the population present barriers to growth

Acetaminophen and aspirin sales set to rise

Innovations expected but Russia's ongoing war likely to favour generics

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sleep aids in high demand as Russia’s war takes its toll on the mental health and wellbeing of locals

Herbal/traditional products and Corvalol the big winners in sleep aids

Domestic players lead the way

PROSPECTS AND OPPORTUNITIES

Sleep aids likely to remain in demand despite competition from other products and services

Innovation and new product development could be key to delivering stronger growth in sleep aids

Domestic players well positioned to maintain their lead with a good balance of affordable pricing, efficacy and quality

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Russia’s war in Ukraine continues to limit the growth potential of the category

Combination products and decongestants thriving thanks to efficacy and broad range of options

Domestic players seeing strong gains in cough, cold and allergy (hay fever) remedies

PROSPECTS AND OPPORTUNITIES

Bright outlook for cough, cold and allergy (hay fever) remedies

Paediatric products set to see a rebound in demand backed by new product development

Increase in allergies expected to boost demand for antihistamines/allergy 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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed results for dermatologicals as Ukrainians carefully manage their spending

Dermocosmetics positively influencing demand for medicated shampoos

Sales of some products benefit from a strong trend towards self-medication

PROSPECTS AND OPPORTUNITIES

Russia's ongoing war likely to influence demand

Increasing incidence of hair loss likely to fuel demand for hair loss treatments

Herbal/traditional products expected to find favour with health conscious consumers

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Digestive remedies on the slow path to recovery

Unhealthy diets and investment in advertising fuelling demand for diarrhoeal remedies and digestive enzymes

Russia's war continues to cast a shadow on sales of paediatric digestive remedies

PROSPECTS AND OPPORTUNITIES

Several factors point towards a bright outlook for digestive remedies

Smaller categories projected to post some of the strongest growth rates

Herbal/traditional products seen as a bright spot in the future of 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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Eye care sales being driven by rising pollution levels and increasing screen time

Allergy eye care the most dynamic category as consumers get their priorities in order

Competition heating up as a flurry of new brands and products enter the market in 2024

PROSPECTS AND OPPORTUNITIES

Bright outlook for eye care

Growth expected to be fuelled by rising incidence of allergies, economic improved and increased competition

Pharmacies likely to account for the bulk of sales despite the rise of e-commerce

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sales on the slow path to recovery as more smokers quit
- Consumers increasingly turning to alternative methods of quitting
- Nicorette holds a monopoly in NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

- The growth and development of the category will likely remain linked to Russia’s ongoing war in the country
- More variety could be key in rejuvenating the fortunes of NRT smoking cessation aids
- New brands could look to break Nicorette’s monopoly as demand grows

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Wound care sales seeing slow recovery as Russia’s war continues to impede the category’s growth potential
- Mixed performances seen in wound care
- Competition varies across the different categories

PROSPECTS AND OPPORTUNITIES

- Wound care set for growth but a full recovery is unlikely until the end of Russia’s war in Ukraine
- Demographic factors likely to have a mixed impact on demand
- Competition likely to remain fragmented due to a lack of brand loyalty

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales remain deflated as the fallout from Russia's invasion of Ukraine continues to impact demand

Healthy performances seen from both sports protein and non-protein products

Competition remains highly fragmented

PROSPECTS AND OPPORTUNITIES

Challenges and opportunities remain for sports nutrition

Sports protein powder set to be the most dynamic category

Sports non-protein products still full of growth potential but further education may be needed to reach more consumers

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dietary supplements thriving as consumers become more health conscious

Consumers turn to dietary supplements to treat specific health issues

Probiotic supplements seen as useful in boosting the immune system and improving gut health

PROSPECTS AND OPPORTUNITIES

Demand for dietary supplements set to continue growing

Calming products, new product development and e-commerce set to be key growth drivers

New and more advanced products could present significant growth opportunities

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Economic pressures limit the growth of vitamins but positive signs seen in 2024

Single vitamins benefiting from increasing awareness of the benefits of different products

Domestic players make gains as consumers look for value

PROSPECTS AND OPPORTUNITIES

Bright outlook for vitamins

Increasing focus on health and wellness set to fuel growth

Targeted offerings could present new growth opportunities

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Unhealthy lifestyle habits fuelling demand for weight management and wellbeing

Weight loss supplements remain on top thanks to strong product range and widespread availability

Herbalife remains on top but the competition is becoming increasingly fragmented

PROSPECTS AND OPPORTUNITIES

Growing desire to look and feel good expected to underpin category growth over the forecast period

Meal replacement set to benefit from convenience and increased competition

Direct selling and e-commerce set to be key channels in the future of weight management and wellbeing

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Herbal/traditional products still in demand despite the shift to standard medicine

More consumers turning to herbal/traditional products thanks to the lack of side effects and safer image

Competition remains fragmented with Bionorica retaining the lead

PROSPECTS AND OPPORTUNITIES

Demand set to continue growing but category maturity could limit stronger growth opportunities

Herbal/traditional products paediatric dietary supplements and digestive remedies set to be the two most dynamic categories

Competition likely to intensify as demand for herbal/traditional products grows

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 Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demographic factors remain an obstacle to growth but signs are more positive as parents prioritise spending on their children
Parents show willingness to self-medicate coughs and colds, with a growing emphasis on preventative health measures
Competitive landscape remains fragmented with Nurofen remaining on top

PROSPECTS AND OPPORTUNITIES

A bright outlook for paediatric consumer health with parents putting their children’s health first
Sales of vitamins and dietary supplements set to benefit from the improving economic situation
Self-medication could become prominent when treating milder symptoms

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-ukraine/report.