



Euromonitor
International

Consumer Health in Georgia

September 2024

Table of Contents

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 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 Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales rise as value sales struggle in 2024
Panadol as preferred choice for acetaminophen
Highly fragmented landscape encourages consumers to prioritise price

PROSPECTS AND OPPORTUNITIES

Slowed growth forecast for analgesics in Georgia
Price regulation to impact category development
Progress to come from established players

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

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Value growth is moderate in 2024
- Aversi-Rational continues to lead overall category
- Whooping cough on the rise

PROSPECTS AND OPPORTUNITIES

- Value growth will be stable during forecast period
- Players to cater to increased price sensitivity
- Consumers will prioritise efficacy, while allergies will continue to rise

CATEGORY DATA

Table 18 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 19 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 21 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 22 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 23 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

Dermatologicals in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rising health consciousness pushes volume sales in 2024
- Hair loss treatment benefits from expanding consumer base, while GSK continues to lead overall category
- High brand loyalty amid intense competition

PROSPECTS AND OPPORTUNITIES

- Positive growth predicted for dermatologicals in Georgia
- Increased investment in improving offerings
- Intense competition will encourage discounts, while consumers shift towards professional advice

CATEGORY DATA

Table 24 - Sales of Dermatologicals by Category: Value 2019-2024

Table 25 - Sales of Dermatologicals by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Dermatologicals: % Value 2020-2024

Table 27 - LBN Brand Shares of Dermatologicals: % Value 2021-2024

Table 28 - Forecast Sales of Dermatologicals by Category: Value 2024-2029

Table 29 - Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

Digestive Remedies in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Local lifestyles support sales in digestive remedies
- A Menarini Industrie Farmaceutiche Riunite leads highly competitive landscape

Rising competitive threat from generics and low-cost alternatives

PROSPECTS AND OPPORTUNITIES

- Forecast period will see sustained demand for digestive remedies
- Competition set to intensify
- Continued consumer focus on efficacy, with ageing population supporting value sales

CATEGORY DATA

- Table 30 - Sales of Digestive Remedies by Category: Value 2019-2024
- Table 31 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024
- Table 32 - NBO Company Shares of Digestive Remedies: % Value 2020-2024
- Table 33 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024
- Table 34 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029
- Table 35 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

Wound Care in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Wound care is mature and suffers from limited growth potential
- Variety of offers expands with Betasan’s Santavik brand ahead of the rest
- Sticking plasters lacks innovation

PROSPECTS AND OPPORTUNITIES

- Stable growth predicted for wound care in Georgia
- Convenience trend set to accelerate
- Price competition and value-added solutions to become more prevalent

CATEGORY DATA

- Table 36 - Sales of Wound Care by Category: Value 2019-2024
- Table 37 - Sales of Wound Care by Category: % Value Growth 2019-2024
- Table 38 - NBO Company Shares of Wound Care: % Value 2020-2024
- Table 39 - LBN Brand Shares of Wound Care: % Value 2021-2024
- Table 40 - Forecast Sales of Wound Care by Category: Value 2024-2029
- Table 41 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

Sports Nutrition in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Category sales supported by rising fitness trends
- Limited players competing in sports nutrition
- Price-sensitive consumers prompt players to offer regular discounts, with e-commerce providing significant sales

PROSPECTS AND OPPORTUNITIES

- Growth set to continue throughout forecast period
- Players will broaden their portfolios
- Specialist retailers will remain leading channel amid intensifying competition

CATEGORY DATA

- Table 42 - Sales of Sports Nutrition by Category: Value 2019-2024
- Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024
- Table 44 - NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 46 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

Dietary Supplements in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growth continues in line with rising awareness
- Regular consumption increases
- Advertising and discounting remain key within fragmented landscape

PROSPECTS AND OPPORTUNITIES

- Stable growth predicted thanks to heightened consumer awareness
- Competition will remain intense
- New players anticipated to enter dietary supplements in Georgia

CATEGORY DATA

Table 48 - Sales of Dietary Supplements by Category: Value 2019-2024

Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024

Table 50 - Sales of Dietary Supplements by Positioning: % Value 2019-2024

Table 51 - NBO Company Shares of Dietary Supplements: % Value 2020-2024

Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024

Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029

Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

Vitamins in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growth supported by rising consumer awareness
- Players invest in promotion, while multivitamins accounts for greatest value share
- Dietary supplements presents rising threat to vitamins, and Takeda continues to lead

PROSPECTS AND OPPORTUNITIES

- Stable demand forecast for vitamins
- Players will continue to invest in promotional strategies, with multivitamins remaining biggest value drivers
- Competition set to intensify with women remaining target for multivitamins

CATEGORY DATA

Table 55 - Sales of Vitamins by Category: Value 2019-2024

Table 56 - Sales of Vitamins by Category: % Value Growth 2019-2024

Table 57 - Sales of Multivitamins by Positioning: % Value 2019-2024

Table 58 - NBO Company Shares of Vitamins: % Value 2020-2024

Table 59 - LBN Brand Shares of Vitamins: % Value 2021-2024

Table 60 - Forecast Sales of Vitamins by Category: Value 2024-2029

Table 61 - Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

Weight Management and Wellbeing in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hectic lifestyles drive consumption
Growth remains limited by few players and products, and shifting consumer focus
Sports nutrition as a rising threat, while GM Pharmaceuticals maintains category leadership

PROSPECTS AND OPPORTUNITIES

Demand fuelled by promise of efficacy
Category faces challenges from niche positioning and competition from sports nutrition
Lack of promotions and discounts to hinder growth, with alternative solutions offering further challenges

CATEGORY DATA

- Table 62 - Sales of Weight Management and Wellbeing by Category: Value 2019-2024
- Table 63 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
- Table 64 - NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
- Table 65 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
- Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
- Table 67 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

Herbal/Traditional Products in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth supported by rising interest dietary supplements and cough remedies
Products suffer from perception of low efficacy
Naturalness trend boosts interest in herbal/traditional options, while GMP continues to lead overall category in 2024

PROSPECTS AND OPPORTUNITIES

Category faces struggles ahead
Competition will intensify, prompting price reductions and more green messaging
Natural trend to both support sales and increase cross-category competition, while segmentation will expand

CATEGORY DATA

- Table 68 - Sales of Herbal/Traditional Products: Value 2019-2024
- Table 69 - Sales of Herbal/Traditional Products: % Value Growth 2019-2024
- Table 70 - NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024
- Table 71 - LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024
- Table 72 - Forecast Sales of Herbal/Traditional Products: Value 2024-2029
- Table 73 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2024-2029

Paediatric Consumer Health in Georgia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Vitamins leads in 2024, despite declining birth rate
GSK continues to lead, leveraging trust in high-quality offerings
Preventative approach supports specific segments within an underdeveloped category

PROSPECTS AND OPPORTUNITIES

Forecast period will see stable demand and expanded portfolios, while birth rate continues to fall
Falling birth rate and competition from fortified and functional foods threaten progress
Players to invest more in product development

CATEGORY DATA

- Table 74 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 77 - 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-georgia/report.