



Euromonitor
International

Consumer Health in Uzbekistan

October 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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

New regulations and VAT lead to a retail volume drop for analgesics
Combination analgesics are a leading choice, as consumers appreciate the formulas
Indian products face a backlash, causing consumers to migrate away from these goods

PROSPECTS AND OPPORTUNITIES

Ongoing value growth as acetaminophen remains a key product
Local brands gain ground, however, loyalty to global offerings remains
International players adapt to supply goods across the forecast period

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Regulatory changes have dampened sales of products in cough, cold and allergy remedies

Cough remedies outpace combination products in 2024

High attention is given to the paediatric category, while parents migrate to European brands

PROSPECTS AND OPPORTUNITIES

Marketing strategies remain key to sales across the forecast period

Combination products suffer as consumers migrate to medication for specific symptoms

Allergy rates rise in the country, boosting sales of allergy remedies

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Uzbeks place low emphasis on dermatological products in 2024

Dermatologicals records growth as cases of eczema increase

As urbanisation increases, topical antifungals record rapid growth

PROSPECTS AND OPPORTUNITIES

Lack of preventive care stifles strong volume sales over the forecast period

The rising birth rate leads to positive growth for paediatric dermatological products

Narrow portfolio of local producers across the forecast period

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

The implementation of VAT boosts retail value while volume sales struggle

Sales of H2 blockers decline as consumers migrate to proton pump inhibitors

Rising awareness of digestive health issues drives sales of enzyme

PROSPECTS AND OPPORTUNITIES

- Local cuisine spurs the development of the digestive remedies landscape
- Generics options fill supply gaps and drive sales on the landscape
- Shifts on the landscape will favour local digestive players above international offerings

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Basic solutions and lack of innovation hold back the wound care landscape
- Local producer Sarbontex JV offers cost-effective solutions to stand out on shelves
- Imports remain a dominant force on the competitive landscape

PROSPECTS AND OPPORTUNITIES

- Limited space for research and development hinders prospects
- Turkish and Russian continue to lead the landscape across the forecast period
- Decreasing number of pharmacies may reduce access to wound care items

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Slow movement for sports nutrition as participation in fitness remains low
- Growth is urban-centric, where consumers have stronger interest in sports
- Official distributors and regulated imports are becoming commonplace

PROSPECTS AND OPPORTUNITIES

- Online media support drives sales across the forecast period
- International brands lead while local producers gain ground
- Protein powder benefits from well-established, trusted names

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Steady growth for dietary supplements, driven by non-herbal/traditional options
- Local production is gaining a stronger foothold in the competitive landscape
- Sanofi is gaining ground through its offering of Magne B6

PROSPECTS AND OPPORTUNITIES

- The illicit market challenges growth for dietary supplements over the forecast period
- Active growth is anticipated as consumers appreciate the benefits of supplements
- Products consumers consider to be essential, gain ground across the forecast period

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Steady recovery post-COVID-19 as consumers implement daily vitamins
- Vitamins that target specific audiences and needs drive growth
- Multivitamins outshine the growth of single vitamins in 2024

PROSPECTS AND OPPORTUNITIES

- While vitamins remain popular, they are not prioritised by some consumers
- Rising demand for children's vitamins as the birth rate continues to rise
- Development of local products remains low as international products dominate

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 Uzbekistan

2024 DEVELOPMENTS

- Weight management and wellbeing remains underdeveloped in 2024
- Local player Zamona Rano sees success, thanks to marketing investment

Weight loss supplements dominate sales

PROSPECTS AND OPPORTUNITIES

Sales remain underdeveloped due to a lack of concern over obesity
Gradually emerging interest amongst Uzbek women in controlling their weight
Weight control projects could boost sales over the coming years

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Heightened trust leads to a notable boost in growth for herbal remedies
Herbal medications has a stronger performance in regions, compared to towns
Players focus on addressing top health concerns across the country

PROSPECTS AND OPPORTUNITIES

Growth for herbal traditional products driven by greater accessibility
Local producers are positioned to expand and perform well over the forecast period
Lower price for herbal medications can lead to higher sales

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 Uzbekistan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive growth as the birth rate in Uzbekistan continues to rise
Increasing case of allergies benefit sales of paediatric allergy products
Well-established cough and cold medicines are becoming the first choice

PROSPECTS AND OPPORTUNITIES

Projected expansion of paediatric analgesics across the forecast period
Sustainable growth as parents become increasingly interested in early healthcare
Paediatric healthcare grows as parents shift away from traditional remedies

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

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-uzbekistan/report.