



Euromonitor  
International

# Consumer Health in New Zealand

November 2025

Table of Contents



## Consumer Health in New Zealand

### EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for Consumer Health?

### MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

### MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

### 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 New Zealand

### KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Growing recognition of chronic pain drives analgesics sales in New Zealand

Leading analgesics players leverage promotional efforts and sports sponsorship investments to build brand awareness locally

Supermarkets and pharmacies continue to shape retail channel dynamics

### PROSPECTS AND OPPORTUNITIES

Sales likely to be driven by topical analgesics/anaesthetic and adult acetaminophen despite Trump's autism claims

Digital tools offer tech-based solutions for chronic pain management through tracking and cognitive behavioural therapy

Paracetamol scheduling under review amid Australian regulatory changes and rising safety concerns

### CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025



Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Sleep aids sales rise in response to sleep trends and growing mental health concerns
- Local player continues to dominate otherwise fragmented competitive landscape within sleep aids in 2025
- Pharmacies remains primary distribution channel, with discount pharmacy chains offering value-driven pricing

PROSPECTS AND OPPORTUNITIES

- Sleep aids anticipated to face further economic headwinds and rising competition from aligned wellness categories as consumers seek all-in-one stress solutions
- Reclassification of melatonin as OTC opens new growth pathways for sleep aids
- Local traditional remedies repositioned as novel ingredients hold potential to reshape sleep aids

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025

Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025

Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Combination products drive steady growth in 2025 as pseudoephedrine-containing products are back on pharmacy shelves
- International players lead as regulatory shifts shake up brand dynamics within cough and cold remedies
- Supermarkets leads distribution in 2025, with pharmacies set to leverage improved access to previously restricted medicines following regulatory changes

PROSPECTS AND OPPORTUNITIES

- Modest growth likely over the forecast period amid prospect of further regulatory and legal review
- Government funding of Fexaclear has potential to reshape systemic antihistamine market
- Cost-of-living pressures likely to drive cross-category competition and encourage consumer shift towards affordable alternatives and preventative health and wellness

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in New Zealand

KEY DATA FINDINGS



## 2025 DEVELOPMENTS

Hair loss treatments drives dermatologicals, thanks to stress, early-onset concerns and broader consumer uptake

Multinational dominance and strategic brand shifts seen in 2025

Pharmacies retains lead, with mergers and acquisitions in Australia set to shake-up the channel in New Zealand

## PROSPECTS AND OPPORTUNITIES

Ageing population, stress-linked conditions and shifting consumer preferences to drive growth within dermatologicals over the forecast period

Local innovation within antiparasitics/lice (head and body) treatment boasts biofluorescence breakthrough

Declining birth rates reshape demand for nappy (diaper) rash treatments in New Zealand

## CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025

Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

## Digestive Remedies in New Zealand

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Digestive remedies proves resilient amid poor dietary habits and rising demand for gut health support

Multinational companies lead a loyalty-driven landscape, with brand consolidation most evident in more niche segments

Supermarkets maintains its noteworthy distribution lead for digestive remedies sales in 2025

## PROSPECTS AND OPPORTUNITIES

Digestive remedies faces struggles amid price pressure and food-led wellness trends

Gut health awareness and interest in probiotics is revealed to be high among NZ netizens according to global study by Italian university

GLP-1 medications likely to impact digestive health innovation in New Zealand

## CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

## Eye Care in New Zealand

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Age-related conditions, digital strain and increased prevalence of allergens drive growth for eye care in 2025

Care Pharmaceuticals' Clear Eyes maintains brand leadership through format innovation and broad consumer appeal

Pharmacies leads distribution for eye care in 2025

## PROSPECTS AND OPPORTUNITIES

Rising trend of digital lifestyles should drive strong performance for forecast period

University of Auckland castor oil trial could unlock new opportunities for natural dry-eye therapies in New Zealand

Local and global CSR efforts focus on advancing First Nations eye health and enhancing sustainability within eye care



## CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025

Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025

Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025

Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025

Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

## NRT Smoking Cessation Aids in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising public health awareness and tobacco control measures drive sales amid shifting consumption trends

International players retain leadership and drive competitive dynamics

Pharmacies dominates distribution in 2025 thanks to regulatory status, brand equity and affordability of subsidised access

#### PROSPECTS AND OPPORTUNITIES

Shifting policy and competition from alternative formats likely to reshape outlook for NRT smoking cessation aids over the forecast period

New Zealand moves to sustainably tackle digital waste by banning the manufacture, sale, supply and distribution of single-use vape technology

Regulatory divergence likely to remain key in New Zealand's harm reduction approach to heated tobacco vs. nicotine pouches

### CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2020-2025

## CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

## Wound Care in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Wound care sees value and volume sales rise in 2025 thanks to active lifestyles and ageing population

Multinational brands hold steady in wound care in New Zealand, as Elastoplast rolls out global Second Skin Protection locally

Steady demand, extensive ranging and discount strategies ensure distribution lead for pharmacies

#### PROSPECTS AND OPPORTUNITIES

Wound care sales set to rise as consumers seek value and functionality

Elastoplast strengthens brand visibility and emotional resonance among local consumers through rugby union and rugby league sponsorship

Eco-friendly sticking plasters/adhesive bandages gain traction in New Zealand amid rising health and environmental concerns

## CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2020-2025

Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030



## Sports Nutrition in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Sports non-protein products drives growth in 2025

Vitaco leads, with Naturalac and Glanbia among key competitors

Supermarkets leads sales as omnichannel retail and bulk formats drive strong performance within retail e-commerce

#### PROSPECTS AND OPPORTUNITIES

Future growth will be driven by wellness trends and demand for functional snacking

Sports nutrition in New Zealand balances local dairy strengths with rising demand for sustainable sports protein alternatives

Marine-based innovation positions New Zealand at the forefront of sustainable sports protein development

#### CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

## Dietary Supplements in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Probiotic supplements and combination supplements lead growth in 2025

Competitive landscape characterised by product innovation

Rising interest in gut health prompts innovative 60-day health journey format

#### PROSPECTS AND OPPORTUNITIES

Dietary supplements set for growth amid evolving consumer trends and pending regulatory reform

New Zealand researchers propose grading system to aid use of probiotics for mental health

Scientific substantiation and regulatory alignment to continue to drive credible innovation

#### CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025

Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

## Vitamins in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising health awareness drives value growth despite subdued consumer confidence

A mix of multinational, regional and local companies characterises the competitive landscape in 2025

Pharmacies and retail e-commerce continue to outperform supermarkets and direct selling

#### PROSPECTS AND OPPORTUNITIES



Innovation, personalisation and format diversification to drive steady growth throughout forecast period

Reports of B6 toxicity concerns among Australian regulators prompt growing awareness over safety and supplement labelling in New Zealand

New Zealand government and industry stakeholders consult on standalone bill to modernise regulation of natural health products following repeal of the TPA

CATEGORY DATA

- Table 75 - Sales of Vitamins by Category: Value 2020-2025
- Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025
- Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025
- Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025
- Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025
- Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030
- Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Prevalence of obesity and an ageing population shape development in 2025
- Evolving consumer needs create category overlap as wellbeing boundaries blur between sports nutrition and weight management
- Personalised advice and immediate accessibility contribute to consumer preference for physical retail and direct sales channels

PROSPECTS AND OPPORTUNITIES

- Lifestyle-led alternatives to further challenge traditional weight loss formats over the forecast period
- GLP-1 approvals could reshape New Zealand’s weight management landscape
- Opportunity for established players as social media scams undermine trust in novel treatments and their medical endorsements

CATEGORY DATA

- Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025
- Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025
- Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025
- Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025
- Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030
- Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Multifunctional formats, natural trend and traditional ingredients drive overall growth
- Brand leadership and strategic shifts influence herbal/traditional products landscape
- Pharmacies channel leads distribution of dietary supplements, while supermarkets support sales of medicated confectionery

PROSPECTS AND OPPORTUNITIES

- Natural positioning and sustainability to remain key growth drivers
- Traditional products poised to shape innovation in natural health through cultural knowledge and therapeutic research
- New Zealand to develop standalone bill that will impact herbal/traditional products following repeal of Therapeutic Products Act

CATEGORY DATA

- Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025
- Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025
- Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025
- Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025



Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

## Paediatric Consumer Health in New Zealand

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Preventative care supports sales in paediatric consumer health despite economic pressures

Regional and multinational players shape competitive landscape

Pharmacies and retail e-commerce strengthen as shoppers seek trusted, personalised retail experiences

#### PROSPECTS AND OPPORTUNITIES

Growth set to continue despite demographic contraction and pressure on margins

Sigma-Chemist Warehouse merger will intensify pharmacy channel dominance, with likely implications for access, pricing and brand visibility

Rising concern over paediatric gummies could undermine trust parental trust over the forecast period

#### CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

## 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-new-zealand/report](https://www.euromonitor.com/consumer-health-in-new-zealand/report).