



Passport

Herbal/Traditional Products in Argentina

Euromonitor International

October 2021

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purposes only.

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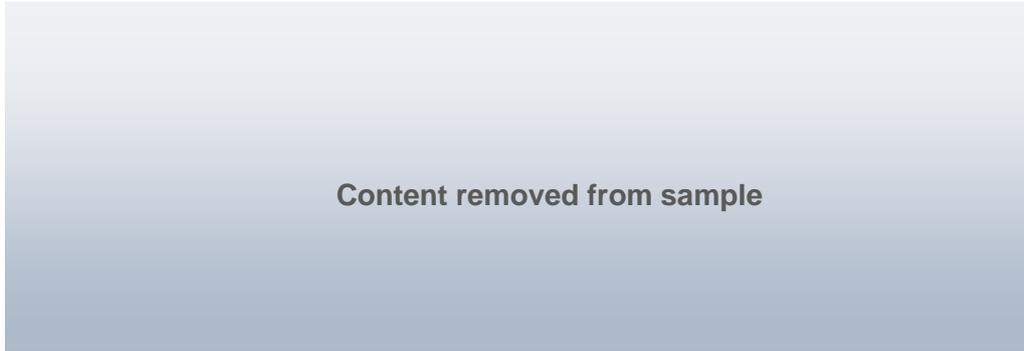
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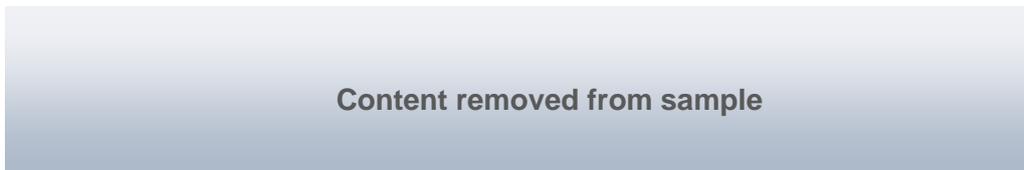
HERBAL/TRADITIONAL PRODUCTS IN ARGENTINA - CATEGORY ANALYSIS

KEY DATA FINDINGS

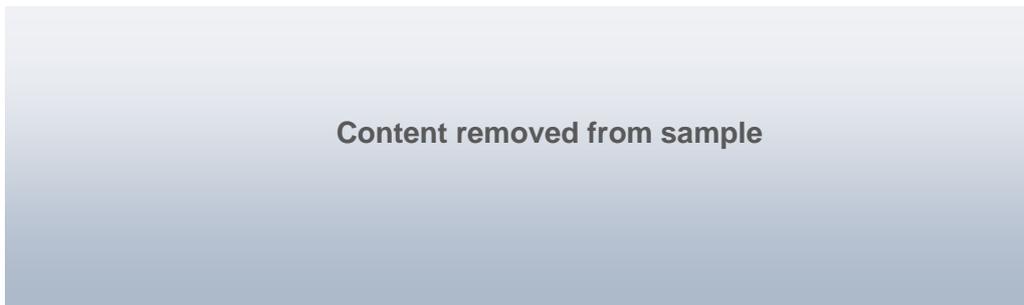


2021 DEVELOPMENTS

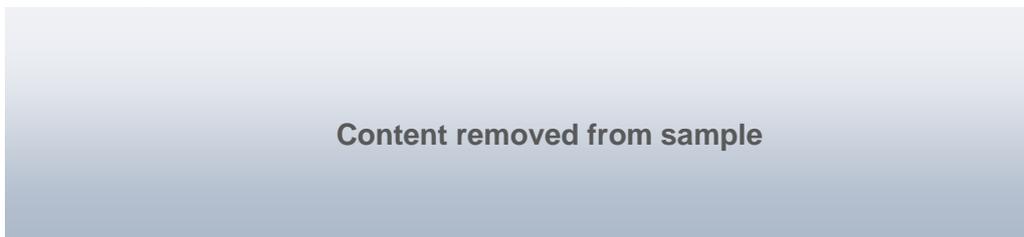
COVID-19 boosts demand for herbal/traditional products as consumers seek prevention in 2021



Arcor and Mondelez Argentina leads herbal/traditional products, while Laboratorio Elea buys Hepatalgina in 2020

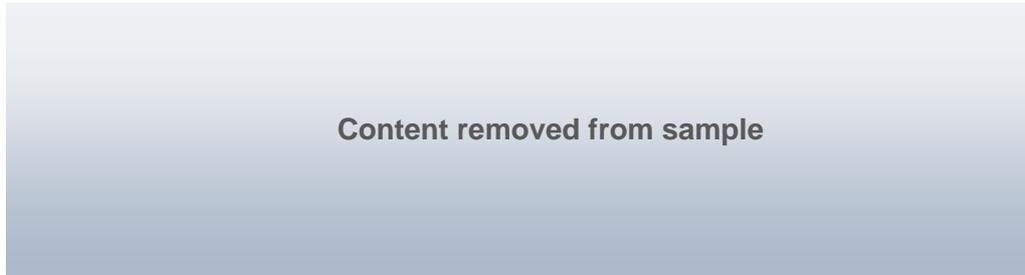


Herbalife performs well in herbal/traditional products in 2021

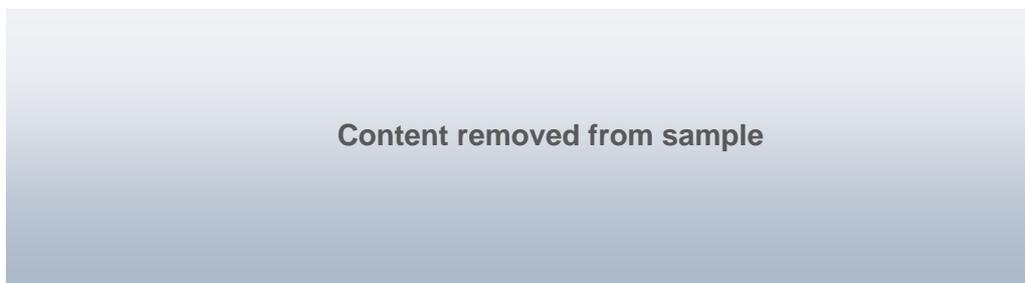


PROSPECTS AND OPPORTUNITIES

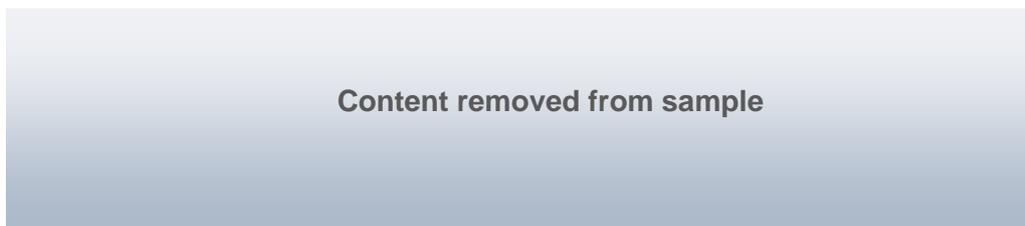
Herbal/traditional products set to continue enjoying high levels of self-medication in coming years



Ageing population and expansion of dietéticas set to drive demand for herbal/traditional products in the forecast period



Consumers more likely to pay extra for natural products during the forecast period



CATEGORY DATA

Table 1 Sales of Herbal/Traditional Products by Category: Value 2016-2021

ARS million

	2016	2017	2018	2019	2020	2021
Herbal/Traditional	Data removed from sample					
Topical Analgesics						

Herbal/Traditional Sleep Aids
 Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies
 Herbal/Traditional Digestive Remedies
 Herbal/Traditional Dermatologicals
 Herbal/Traditional Paediatric Dietary Supplements
 Herbal/Traditional Dietary Supplements
 Herbal/Traditional Tonics
 Herbal/Traditional Products



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 2 Sales of Herbal/Traditional Products by Category: % Value Growth 2016-2021

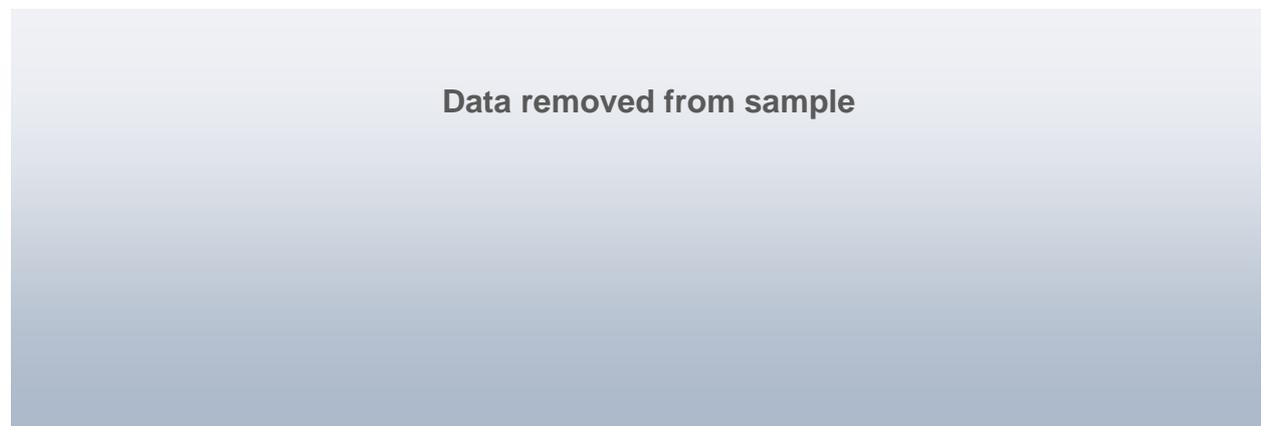
% current value growth

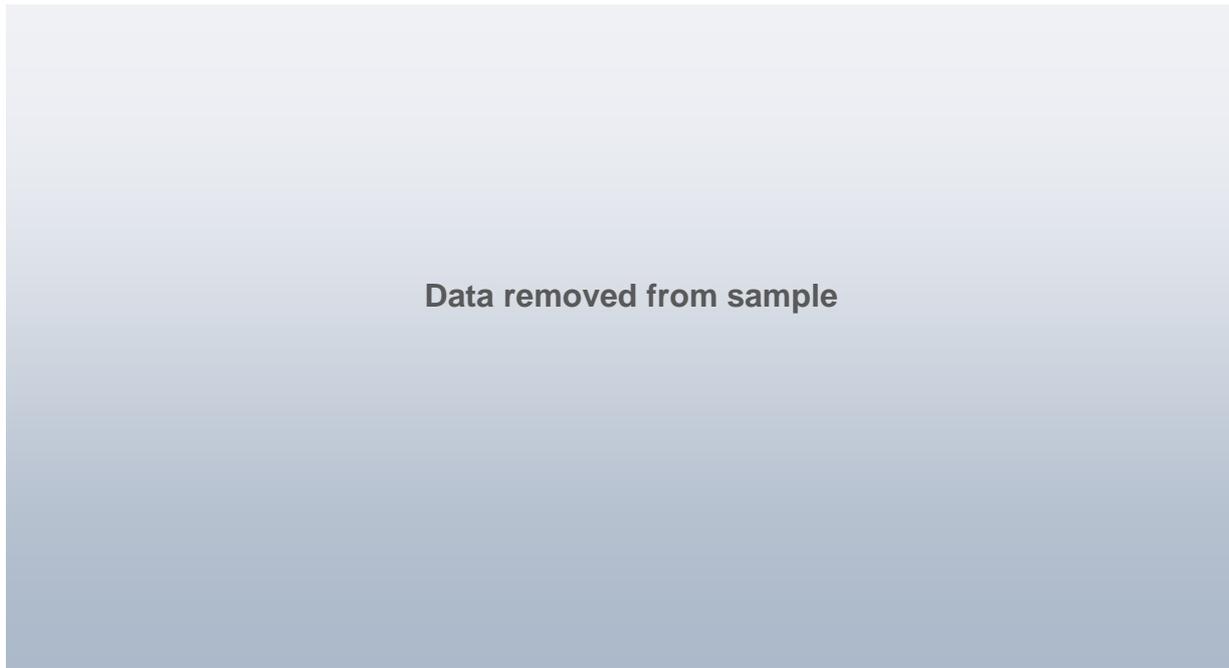
	2020/21	2016-21 CAGR	2016/21 Total
Herbal/Traditional Topical Analgesics	Data removed from sample		
Herbal/Traditional Sleep Aids			
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies			
Herbal/Traditional Digestive Remedies			
Herbal/Traditional Dermatologicals			
Herbal/Traditional Paediatric Dietary Supplements			
Herbal/Traditional Dietary Supplements			
Herbal/Traditional Tonics			
Herbal/Traditional Products			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 3 NBO Company Shares of Herbal/Traditional Products: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Herbal/Traditional Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Sales of Herbal/Traditional Products by Category: Value 2021-2026

ARS million	2021	2022	2023	2024	2025	2026
Herbal/Traditional Topical Analgesics	Data removed from sample					
Herbal/Traditional Sleep Aids						
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies						
Herbal/Traditional Digestive Remedies						
Herbal/Traditional Dermatologicals						
Herbal/Traditional Paediatric Dietary Supplements						
Herbal/Traditional Dietary Supplements						
Herbal/Traditional Tonics						
Herbal/Traditional Products						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 6 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Herbal/Traditional Topical Analgesics	Data removed from sample		
Herbal/Traditional Sleep Aids			
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies			
Herbal/Traditional Digestive Remedies			
Herbal/Traditional Dermatologicals			
Herbal/Traditional Paediatric Dietary Supplements			
Herbal/Traditional Dietary Supplements			
Herbal/Traditional Tonics			
Herbal/Traditional Products			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

CONSUMER HEALTH IN ARGENTINA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer health in 2021: The big picture

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2021 key trends

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Competitive landscape

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Retailing developments

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What next for consumer health?

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MARKET INDICATORS

Table 7 Consumer Expenditure on Health Goods and Medical Services: Value 2016-2021

ARS million

	2016	2017	2018	2019	2020	2021
Pharmaceuticals, medical appliances/equipment	Data removed from sample					
Outpatient services						
Hospital services						
Total						

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 8 Life Expectancy at Birth 2016-2021

years

	2016	2017	2018	2019	2020	2021
Males	Data removed from sample					
Females						

Source: Euromonitor International from official statistics

MARKET DATA

Table 9 Sales of Consumer Health by Category: Value 2016-2021

ARS million

	2016	2017	2018	2019	2020	2021
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

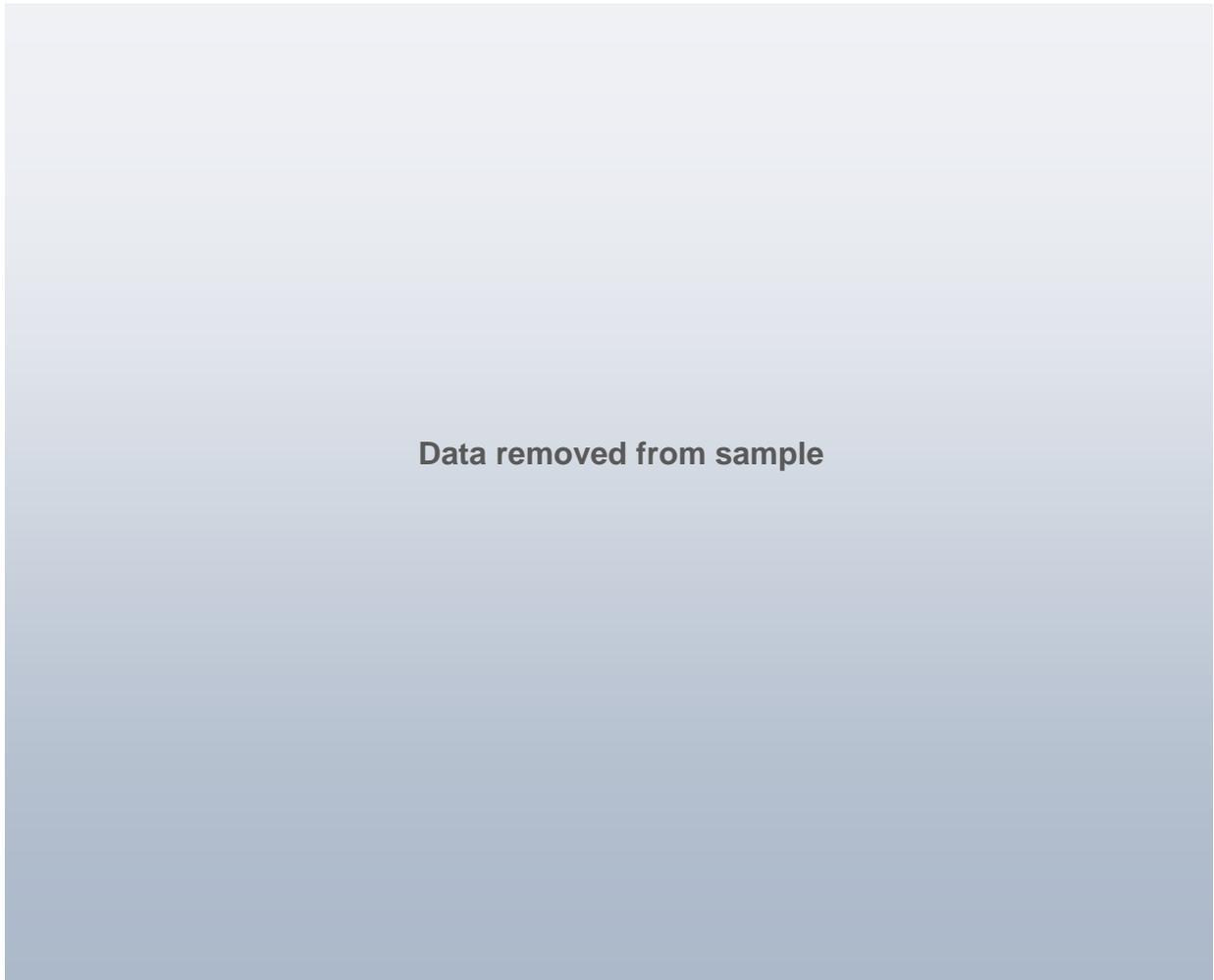
Table 10 Sales of Consumer Health by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
OTC	Data removed from sample		
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			
Consumer Health			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Consumer Health: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed from sample				

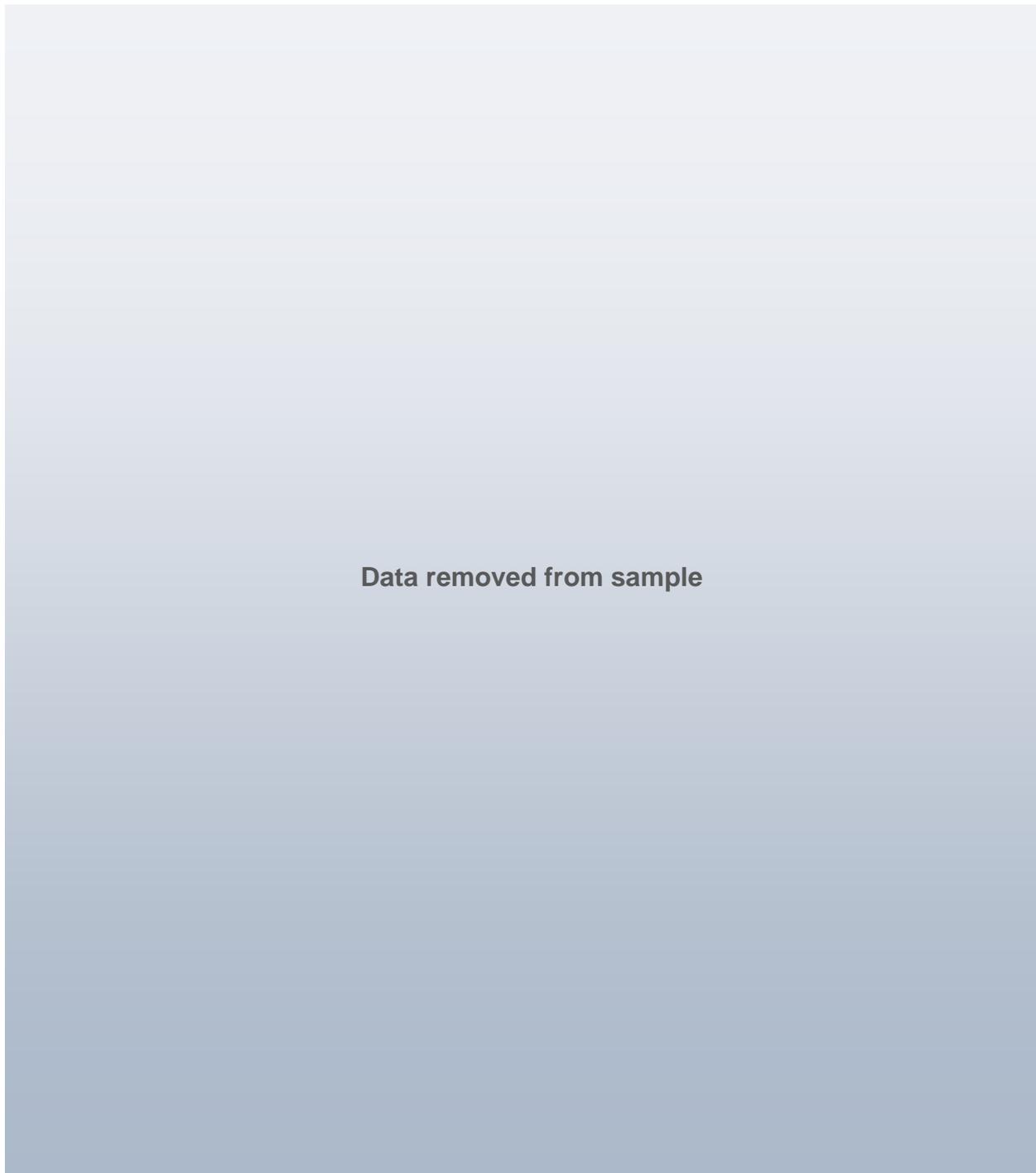


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Consumer Health: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 **Distribution of Consumer Health by Format: % Value 2016-2021**

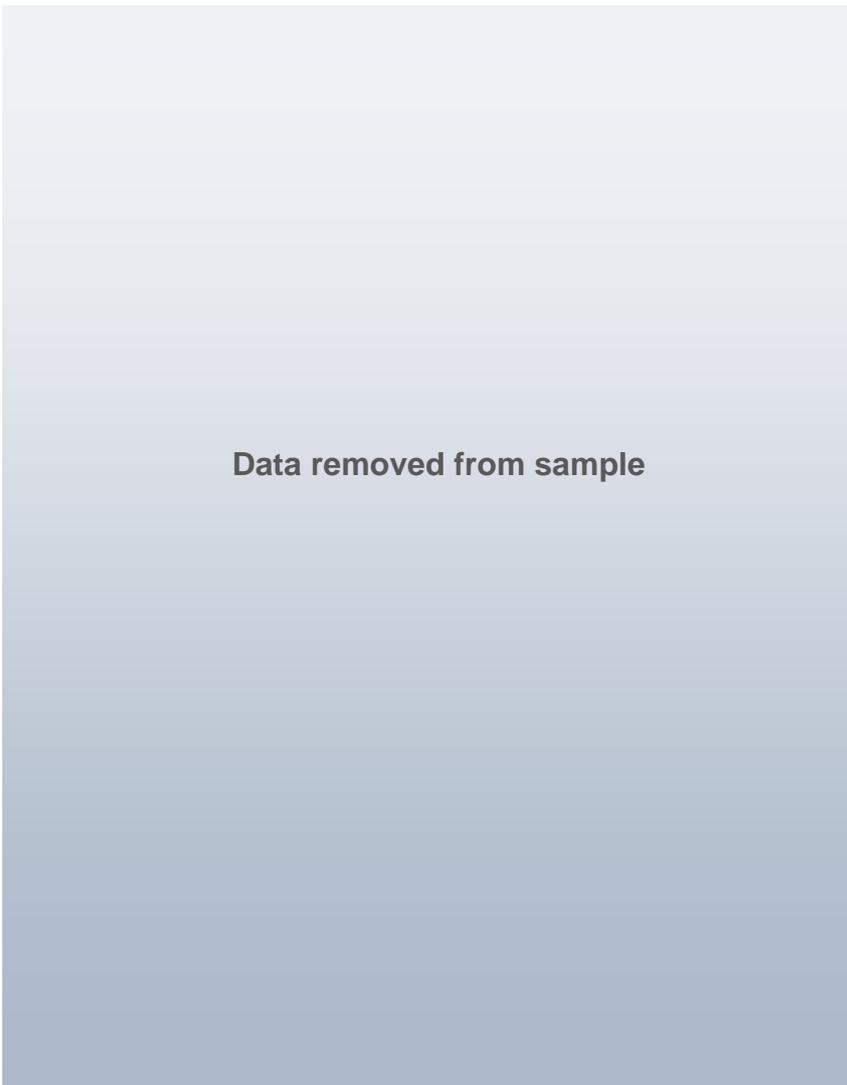
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Other Grocery Retailers						
---- Healthfood shops						
---- Other Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Optical Goods Stores						
--- Drugstores/parapharmacies						
--- Vitamins and Dietary Supplements Specialist Retailers						
--- Other Consumer Health Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Consumer Health by Format and Category: % Value 2021

% retail value rsp	OTC	Sports Nutrition	Vitamins and Dietary Supplements	Weight Management and Wellbeing	Herbal/Traditional Products	Allergy Care
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						

- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



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Consumer
Health

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other



- Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 15 Forecast Sales of Consumer Health by Category: Value 2021-2026

ARS million

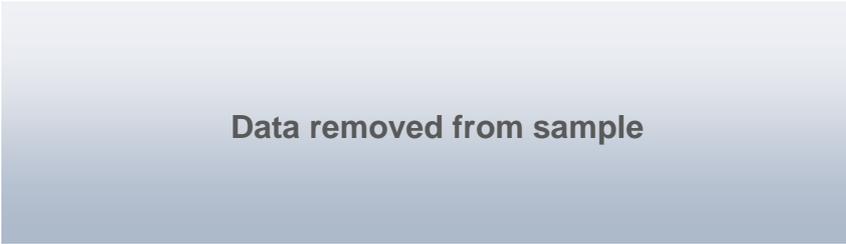
	2021	2022	2023	2024	2025	2026
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Consumer Health by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
	Data removed from sample		

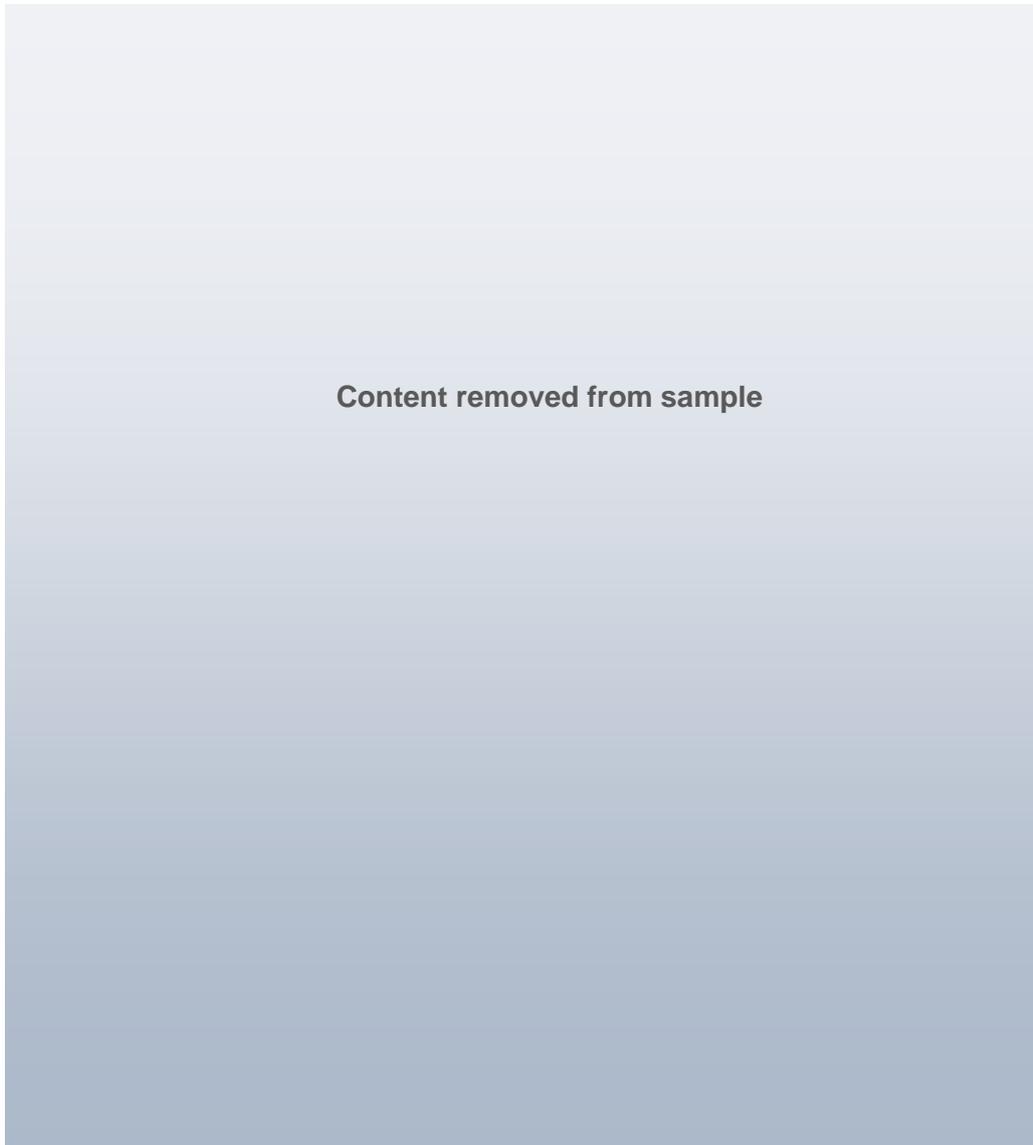
OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health



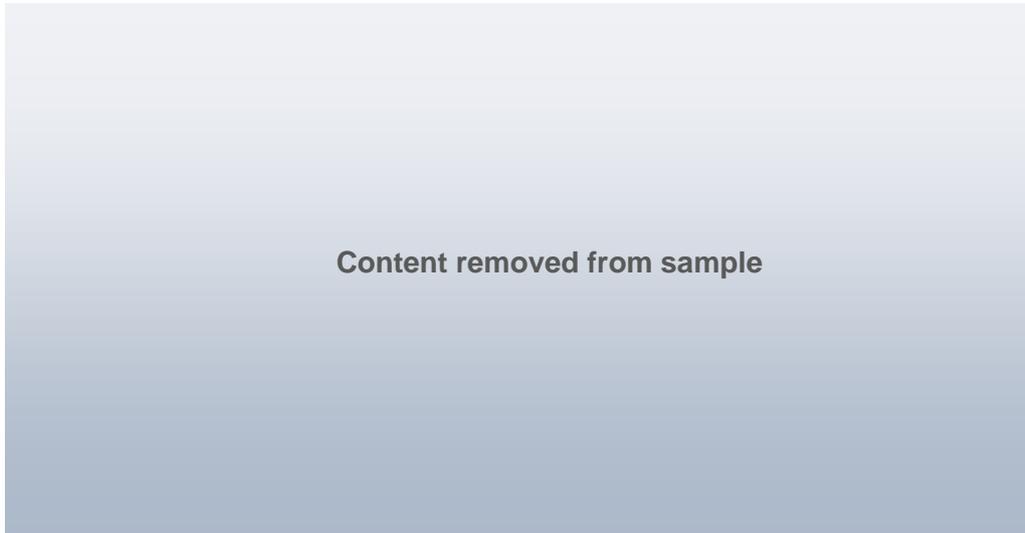
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPENDIX

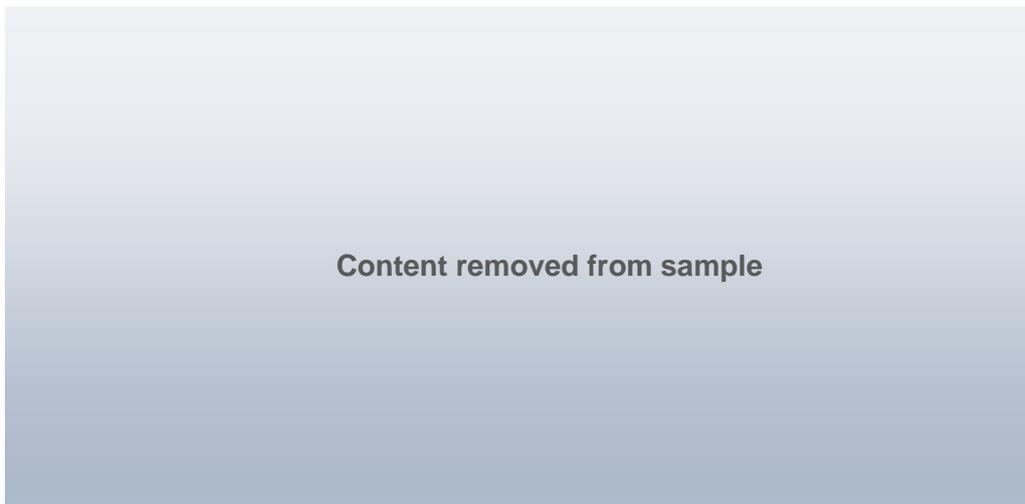
OTC registration and classification



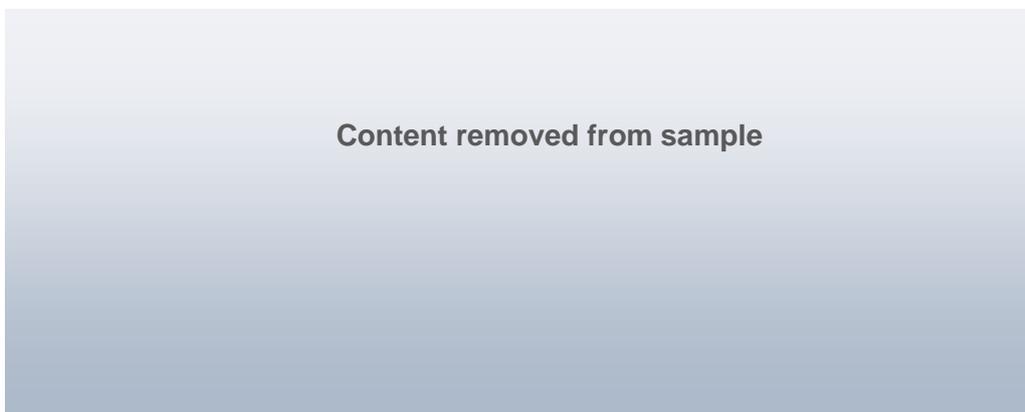
Vitamins and dietary supplements registration and classification



Self-medication/self-care and preventive medicine



Switches



DISCLAIMER

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DEFINITIONS

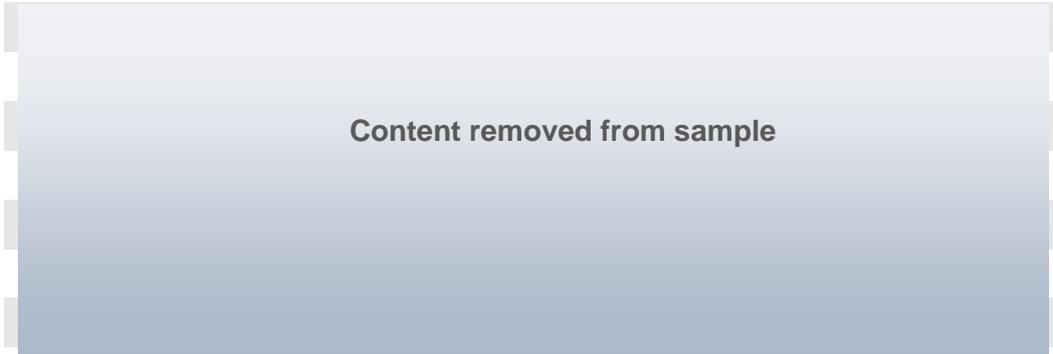
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SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

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Source: Euromonitor International