



Consumer Health in Mexico

September 2024

Table of Contents

Consumer Health in Mexico

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mexico is a market with a wide variety of OTC analgesics

Wide offer of generic, private label, and white label products

Campaigns for the proper use of OTC analgesics

PROSPECTS AND OPPORTUNITIES

Demand for specialised products set to increase

Use of complementary and alternative therapies will force companies to adapt

CBD has the potential to shape the use of topical analgesics/anaesthetic

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increased awareness of the importance of sufficient good quality sleep

Wide product availability ensures access, with herbal/traditional products dominant

Holistic wellbeing a priority to ensure good sleep

PROSPECTS AND OPPORTUNITIES

Alternative treatments could affect the consumption of sleep aids

Focus on natural and non-addictive ingredients

Insomnia and apnoea contribute to high rates of sleep disorders

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasing use of OTC medications due to a move away from antibiotics

Zero sugar products increasing in cough remedies

High levels of environmental pollution increase demand for allergy remedies and nasal decongestants

PROSPECTS AND OPPORTUNITIES

Increasing awareness of respiratory health set to drive growth

Improved formulations, and an increasing number of natural and organic products

Search for innovation to differentiate from the competition

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dryness and hives increase the use of dermatologicals

High levels of pollution cause skin allergies, and sun exposure causes sunburn

Interest in beauty through healthy hair increases

PROSPECTS AND OPPORTUNITIES

Introduction of private label lines in dermatologicals

Advanced formulations and an increase in demand for dermatologicals

Changing demographics likely to increase demand for products for older adults

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increased stress and changes in eating habits drive growth

Tourism boosts sales of digestive remedies in a very particular way

Digestive remedies are often consumed without a specific diagnosis, based on symptoms

PROSPECTS AND OPPORTUNITIES

Increase in supply and availability of digestive remedies to address chronic digestive conditions

Growth of the older population means new demands are anticipated

Recognising the importance of prebiotics and the restoration of gut microbiota

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increase in eye allergies, but standard eye care will continue to dominate

Awareness of vision health care rises

Digital technology is a driver of growth in eye care

PROSPECTS AND OPPORTUNITIES

Increase in demand expected for eye care products amongst older adults

Multifunctional products, and the need to widen sales channels

Natural and gentle ingredients demanded

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Government policies aim to reduce tobacco consumption

Availability of medical and professional support to quit smoking

Perrigo remains the leader in a small category

PROSPECTS AND OPPORTUNITIES

Likely strengthening of public policies

Focus on mental health and emotional wellbeing

Technology likely to be a support and a challenge to NRT smoking cessation aids

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumers pay increased attention to health and hygiene

Care of chronic conditions at home drives sales

Return to outdoor sports activities helps maintain growth for wound care

PROSPECTS AND OPPORTUNITIES

Preference for price above brand will lead to intense competition from generics

Advances in medical technology set to impact wound care

Sustainability and eco-consciousness will be important

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports nutrition increases along with a comprehensive approach to health
Demand for high quality fortified products
Increase in the popularity of sports non-protein products

PROSPECTS AND OPPORTUNITIES

Strategic market positioning and differentiation
E-commerce and smart technologies set to boost sales of sports nutrition
Personalisation based on genetic data

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mental health is a top priority for consumers
Dietary supplements tailored to consumers' lifestyles
Post-COVID-19 change in portfolio of dietary supplements

PROSPECTS AND OPPORTUNITIES

Demand for customised products in dietary supplements
AI data-driven consumption recommendations
Alternative uses of dietary supplements

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Public policies increase consumer awareness of vitamins
Rising interest in health and wellbeing
Change of priorities in vitamins consumption

PROSPECTS AND OPPORTUNITIES

Excess consumption of vitamins could cause vitaminosis
Prevention of chronic diseases
Growth expected for natural and organic products

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slimming teas maintains only low value growth, while meal replacement is more dynamic

Negative perceptions and healthier consumers hamper volume growth

Focus on beauty from within

PROSPECTS AND OPPORTUNITIES

Supplement nutrition drinks set to increase because of widening consumer group

Telemedicine and remote care

Weight management and wellbeing programmes and products adapted for specific needs

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Differentiating herbal/traditional products in accordance with new consumer needs

Herbal/traditional products valued for eye health

Use of adaptogens rooted in local consumption

PROSPECTS AND OPPORTUNITIES

Marketing strategies aimed at specific consumer segments

Importance of sustainability and social responsibility

Changes in marijuana legislation could impact herbal/traditional products

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 Mexico

KEY DATA FINDINGS

2024 DEVELOPMENTS

Focus on prevention rather than cure with paediatric vitamins and dietary supplements

Attention to mental health and emotional issues amongst children

Paediatric vitamins and dietary supplements remains the leading category

PROSPECTS AND OPPORTUNITIES

Herbal/traditional products are gaining acceptance in all paediatric consumer health categories

Innovation in paediatric consumer health products expected in the coming years

Nappy (diaper) rash treatments expected to increase strongly, satisfying new needs in the market

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-mexico/report.