



Consumer Health in Azerbaijan

September 2024

Table of Contents

Consumer Health in Azerbaijan

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of analgesics in decline as economic pressures inform purchasing decisions

Shortage of aspirin leads to an increased demand for other types of analgesics

Cardiomagnyl continues to lead

PROSPECTS AND OPPORTUNITIES

Sales of topical analgesics/anaesthetic expected to stagnate

Panadol and Nurofen seen to have strong potential

Competition between players in the analgesics category will intensify.

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cough, cold and allergy (hay fever) remedies seeing a more stable performance

Demand for allergy remedies on the rise as consumers become more health conscious

Nasal sprays recommended for various symptoms

PROSPECTS AND OPPORTUNITIES

The competitive landscape could undergo further changes as players battle for share

Affordability likely to influence the competitive landscape

Herbal preparations likely to retain their relevance thanks to a safer image

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed performances seen within dermatologicals in 2024

International players dominate

Medicated shampoos in decline as consumers have other priorities

PROSPECTS AND OPPORTUNITIES

Dermatologicals set to continue on a moderate growth path

A children-first approach to budgeting should benefit sales of paediatric dermatologicals

Improved education and awareness, changing lifestyles and climate change some of the factors that are expected to influence demand

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Digestive remedies reports a further drop in demand in 2024 as sales continue to stabilise in the wake of the pandemic

Brand loyalty persists despite the challenging economic environment

Laxatives provides some relief in a challenging market

PROSPECTS AND OPPORTUNITIES

Digestive remedies expected to see a more stable performance over the forecast period

Category maturity and consumers leading healthier lifestyles the main threats to growth

Price-sensitive Azerbaijanis likely to seek out the best deals

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wound care sales in decline as economic pressures take their toll

Lack of brand loyalty with price the main influence on demand

Price stability not enough to boost demand

PROSPECTS AND OPPORTUNITIES

Wound care set for a return to growth but its recovery will be muted

Increasing health education and awareness could influence the market

Increase in sport and fitness activities bodes well for wound care

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports nutrition maintains its dynamic growth momentum as consumers become fitter, healthier and more productive

Imported brands dominate

Protein/energy bars remains the most popular area of sports nutrition

PROSPECTS AND OPPORTUNITIES

More affordable Turkish brands could be key to maintaining growth momentum

Social media marketing expected to become more widespread

The use of organic ingredients is gaining momentum

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

New regulations to control and monitor imports puts pressure on sales of dietary supplements

Dietary supplements no longer available on prescription

Competition intensifying as consumers look for the best value

PROSPECTS AND OPPORTUNITIES

New regulations on the sale and recommendation of dietary supplements could present a significant obstacle to growth

Prices likely to remain stable due to challenging economic conditions

A number of local companies may curtail their activities.

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for vitamins remains stable in most categories with multivitamins remaining the big winner

The range of vitamin D products is expanding as demand grows

Vitamin B benefiting from its mood boosting claims

PROSPECTS AND OPPORTUNITIES

Demand for multivitamins set to be the backbone of growth in sales of vitamins

The habit of supporting immunity stimulates the demand for vitamin C.

Competition in vitamins likely to remain focused on affordable imported brands

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another tough year for weight management and wellbeing as consumers become more price sensitive
Local brands retain a competitive advantage with Herba Flora on the rise
Slimming teas benefiting from their healthier image

PROSPECTS AND OPPORTUNITIES

Weight management and wellbeing seen to have limited growth prospects
Grey imports expected to decrease as the government steps in
Social media becoming an increasingly important tool for marketing weight management and wellbeing

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Herbal/traditional products benefit from their safer image
Competition remains highly fragmented
Herbal/traditional cough, cold and allergy (hay fever) remedies seen as a safer option by parents

PROSPECTS AND OPPORTUNITIES

Increased regulation could limit the growth of herbal/traditional dietary supplements
Good prospects for the development of local and Turkish brands
Herbal/traditional dermatologicals unlikely to find an audience

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 Azerbaijan

KEY DATA FINDINGS

2024 DEVELOPMENTS

Transmission of viruses has increased with the end of the pandemic
Paediatric analgesics under a cloud due to financial pressures and supply issues
Paediatric allergy remedies benefiting from new usage as a treatment for cold/flu symptoms

PROSPECTS AND OPPORTUNITIES

Local brands unlikely to make a significant mark in paediatric consumer health
Price is of secondary importance as consumers turn to tried and trusted products
Mixed outlook for paediatric consumer health

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-azerbaijan/report.