

SOUTH AFRICAN ALLERGY CARE INDUSTRY INSIGHTS REPORTS 2025

PUBLISHED: MAY 2025

COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke Industry and Market Intelligence can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision. From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Intelligence is designed to meet your unique needs.



QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

HEALTHCARE INDUSTRY REPORT CLIENTS

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Allergy Care Industry Landscape Report (89 pages)** provides a dynamic synthesis of industry research, examining the local and global **Allergy Care industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, retail and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Allergy Care Industry Section:

- What are the current market dynamics of the Global Allergy Care industry?
- Which are the key markets within the Global Allergy Care industry?
- What are the latest Global Allergy Care industry trends, innovation and technology, drivers, and challenges?

For the South African Allergy Care Industry Section:

- What are the current market dynamics (market size, market value, market volumes): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Allergy Care industry trends, innovation and technology, drivers, and challenges?

For the South African Allergy Care Manufacturer & Distributor Section:

- Which are the key manufacturing and distributor players in the South African Allergy Care industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Allergy Care brands and products do the respective companies manufacture/distribute?

For the South African Allergy Care Retail and Pricing Analysis Section:

- Which are the brands and products among key retail players (retail pharmacies and in-store retail pharmacies) in the South African Allergy Care industry?
- What are the prices of popular Allergy Care brands and products across South African pharmacies and retail outlets?

89-page report filled with detailed charts, graphs, and insights

EXECUTIVE SUMMARY
GLOBAL INDUSTRY SNAPSHOT

The global Allergy Care market is projected to reach a value of approximately \$14.5 billion by 2025, growing at a CAGR of 4.2%.

Key findings include:

- Increasing prevalence of allergic diseases globally.
- Shift towards biologics and personalized medicine.
- Strong demand for OTC and digital health solutions.



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EXECUTIVE SUMMARY
SA INDUSTRY SNAPSHOT

The value of the South African Allergy Care market is projected to reach approximately \$1.2 billion by 2025, growing at a CAGR of 5.1%.

Key findings include:

- High demand for biologics and personalized medicine.
- Strong demand for OTC and digital health solutions.



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EXECUTIVE SUMMARY
SA INDUSTRY DRIVERS AND CHALLENGES

Key drivers and challenges for the South African Allergy Care market include:

- Increasing prevalence of allergic diseases.
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1. GLOBAL ALLERGY CARE INDUSTRY

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GLOBAL MARKET ENVIRONMENT

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GLOBAL KEY MARKET'S REGIONAL OVERVIEW

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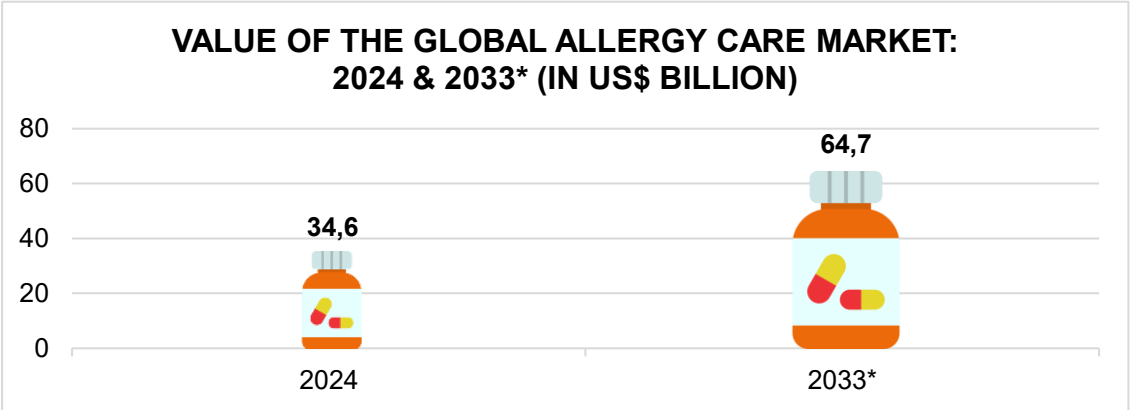


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The global Allergy Care market reached a value of approximately US\$34.57 billion in 2024. The market is projected to grow at a compound annual growth rate (CAGR) of 6.5%, to reach a value of approximately US\$64.7 billion by 2033*, as indicated in the adjacent graph.

- Growing global allergy prevalence continues to drive demand for Allergy Treatment products, as rising pollution, urbanisation, and climate change contribute to worsening allergy triggers such as pollen, dust, and airborne pollutants. Rhinitis, food, and skin allergies remain the most widespread globally, with allergic rhinitis alone impacting over 400 million people.
- Rising awareness, early diagnosis, and better access to treatment are increasing the adoption of both OTC and prescription products. Consumer demand is also shifting toward newer therapies, such as biologics and sublingual immunotherapy, which offer long-term relief.
- Increasing R&D investment and innovation, and emergency interventions are further fuelling market growth. Pharmaceutical players are also expanding partnerships to accelerate trials and product development. However, regulatory scrutiny around common ingredients like phenylephrine, global shortages of Allergy Care products, and the rising cost of advanced treatments remain key challenges to market growth.
- In terms of market segmentation, the global Allergy Care market is segmented based on Type, Treatment, Dosage Form, and Distribution Channel. Based on Type, the market includes Rhinitis, Food Allergy, Skin Allergy, Eye Allergy, Asthma, and Others.

- Rhinitis and Asthma remain the dominant segments, with Rhinitis expected to maintain the highest share through 2033. Food and skin allergies also represent a significant portion of demand, while Eye Allergy and Other segments remain niche.
- In terms of Treatment, the market is segmented into Anti-Allergy Drugs and Immunotherapy. Anti-Allergy Drugs held the largest market share in 2024, driven by their effectiveness in treating symptoms such as sneezing, itching, and congestion. However, Immunotherapy, including sublingual and subcutaneous options, is forecast to grow at a faster pace, as it offers longer-term relief and disease-modifying effects.
- In terms of Dosage Form, Oral treatments dominate due to ease of use, followed by Nasal sprays and Other formats. By Distribution Channel, Retail Pharmacies account for the largest share, though Online Pharmacies are growing rapidly due to e-commerce expansion and direct-to-consumer health platforms.



*Forecast

Promotion of Non-Drowsy Allergy Treatments an Ongoing Trend

- Locally, the Allergy Care market is increasingly focused on promoting non-drowsy allergy treatments, a trend that has gained momentum, especially as the market approaches the annual allergy season. As a result, many market players are prioritising the promotion of non-drowsy allergy medications across various marketing channels.
- Specifically, demand for non-drowsy products highlights the side effects of first-generation allergy medicines, which are known to cause drowsiness. For instance, the active ingredient in Benadryl is commonly found in sleeping pills. When allergies already make users feel tired, medications like Benadryl can exacerbate this tiredness, making users extremely drowsy. To address this issue, several brands are now emphasising non-drowsy allergy medications to prevent these side effects.
- As an example, in 2024, Telfast®, a Sanofi Allergy Care brand, launched a redesigned packaging for its Suspension product. Specifically, the new packaging prominently features a green banner that highlights the non-drowsy allergy relief it offers. Additionally, Telfast® also leveraged its social media platforms to promote the non-drowsy benefits of its Allergy Care products.
- Similarly, Demazin® introduced its new Demazin® Once a Day tablets, which contain a non-drowsy antihistamine to alleviate the common symptoms of allergies such as sneezing, itchy and watery eyes, a runny nose, and coughing.

- Additionally, Abex Pharma launched a new Allergy Care brand, pollentyme® ND. This brand offers both tablets and syrup designed to relieve allergy symptoms like sneezing, runny nose, itchy eyes, and allergic skin conditions. In particular, the packaging of pollentyme® clearly emphasises that the product is non-drowsy.
- Therefore, because first generation allergy medicines are known to cause drowsiness, many market players are emphasising the promotion and advertising of non-drowsy Allergy Care medication, making this a prominent local trend.



SAMPLE FROM REPORT

SA INDUSTRY INNOVATION AND TECHNOLOGY

Bionase™ Introduces Biobact Nasal Cream for Allergy Care and Long-Lasting Relief

- In September 2024, Bionase™ introduced its new Biobact Nasal Cream, designed to provide long-lasting relief from nasal dryness and discomfort whilst protecting against allergens and irritants.
- Formulated with aloe vera, the cream effectively heals, moisturises, and regenerates the delicate tissues inside the nose. It also features antibacterial, antiviral, and antiseptic properties that safeguard against allergens, whilst preventing the growth of bacteria, viruses, and fungi that can aggravate allergy symptoms.
- Additionally, Biobact helps reduce swelling in the mucus membranes, improving airflow and comfort, and uses seminose to stop allergens from sticking to the nasal passages.



New Demazin® Once a Day Provides 24-Hour Relief

- In September 2024, Demazin® introduced its new Demazin® Once a Day tablets, designed to provide effective relief from allergies and hay fever symptoms by blocking the action of histamine, a chemical in the body that triggers allergic reactions.
- More specifically, Demazin® Once a Day contains a non-drowsy antihistamine, and helps prevent the common symptoms of allergies such as sneezing, itchy and watery eyes, a runny nose, and coughing. By blocking histamine, the tablet relieves these annoying symptoms that occur when exposed to allergens like pollen, pet dander, or certain foods.
- Furthermore, Demazin® Once a Day offers 24-hour relief with just one tablet, making it a convenient option for managing allergy-related symptoms throughout the day.



SAMPLE FROM REPORT

ADCOCK INGRAM: COMPANY NEWS



Adcock Ingram Reports Revenue Decline Due to Consumer Spending

In February 2025, Adcock Ingram Holdings reported interim results below expectations due to weak consumer spending. As a result, its share price dropped by 5.56% to R59.90, though it remained higher than the previous year. In addition, revenue fell by 1% to R4.71 billion, while gross profit and headline earnings per share both decreased by 9%, reaching 265.5 cents. **(21 February 2025)**



Allergex® Non-Drowsy Promotes its Product During the Holiday Period

In December 2024, Allergex® Non-Drowsy, an Adcock Ingram Allergy Care brand, promoted its product during the holiday season after a long year. More specifically, Allergex® Non-Drowsy reminded customers that its product allowed for symptom-free celebrations and emphasised its availability at leading pharmacies across South Africa. **(11 December 2024)**



Adcock Ingram Shareholders Review CEO's Compensation Amid Strong Growth

In November 2024, Adcock Ingram shareholders were expected to review Chief Executive Officer (CEO) Andy Hall's R17 million compensation, which was 397% above the industry average. However, shareholders remained focused on the company's growth, noting a 12% increase in earnings per share (EPS) and 57% shareholder returns, likely maintaining his salary level. **(13 November 2024)**



Bionase™ Announces the Launch of Its New Instant Relief Nasal Cream

In November 2024, Bionase™, an Adcock Ingram Allergy Care brand, announced the launch of its new instant relief nasal cream. Formulated for nasal hydration, the product provides instant relief, assists with allergies, provides long-lasting moisture, and protection against airborne germs and is available at Dis-Chem, Clicks, and leading pharmacies nationwide. **(4 November 2024)**



Allergex® Non-Drowsy, Bionase™, and Tellerge Announce Competition

In September 2024, Allergex® Non-Drowsy, Bionase™, and Tellerge, Adcock Ingram Allergy Care brands, announced the '#PollenNoProblem Competition'. Consumers were encouraged to watch a moving flower, capture a screenshot, and upload it in the comments with the hashtag '#PollenNoProblem' for a chance to win a R2,000 Takealot voucher. **(20 September 2024)**



Adcock Ingram Highlights Potential Impact of National Health Insurance Legislation

In May 2024, Adcock Ingram highlighted the potential impact of the National Health Insurance (NHI) legislation on the pharmaceutical industry. Particularly, the company indicated that the NHI-negotiated central pricing model could result in higher buying power for pharmaceutical companies but could reduce earnings for local retailers. **(24 May 2024)**



Adcock Ingram Announces Winner of its 'Brave Online School Shoe Competition'

In April 2024, Adcock Ingram announced the winner of its 'Brave Online School Shoe Competition', recognising Rena Le Lona Creative Centre for Children as the recipients. The centre received 143 school shoes for its learners, with manager Mlungisi Mvelase expressing gratitude and highlighting the positive impact the donation had on both the children and their families. **(23 April 2024)**



SAMPLE FROM REPORT

ADCOCK INGRAM: ALLERGY CARE BRANDS/PRODUCTS

IMAGE	PRODUCT	DESCRIPTION	IMAGE	PRODUCT	DESCRIPTION
	Adco-Zetofen	An Allergy Care syrup formulated for children, that assists in the treatment and prevention of allergic rhinitis and allergic skin reactions.		Bionase™ Nasal Gel Moisturiser	An Allergy Care nasal gel formulated to provide instant relief by moisturising and soothing dry, irritated nasal passages.
	Allergex® Non-Drowsy Syrup	An Allergy Care syrup, formulated for children, that aids in the relief of symptoms associated with allergic rhinitis, such as sneezing and an itching throat, amongst others.		Bionase™ Nasal Spray	An Allergy Care nasal spray that aids in relieving symptoms such as sinus congestion, hay fever, and postnasal drip.
	Allergex® Non-Drowsy Tablets	An Allergy Care tablet formulated for the relief of symptoms associated with seasonal allergic rhinitis and chronic urticaria.		Ceticit Syrup	An Allergy Care syrup formulated for the symptomatic relief of allergic conditions, including allergic rhinitis and allergic skin conditions.
	Bionase™ Biobact Nasal Cream	An Allergy Care nasal cream, formulated to soothe painful dry noses, amongst others.		Ceticit Tablets	An Allergy Care tablet formulated for allergic processes responding to a histamine H1 receptor, antagonist, allergic rhinitis, and hay fever, amongst others.
	Bionase™ Kids Nasal Spray	An Allergy Care nasal spray, formulated for children, that aids with sinus congestion, hay fever, postnasal drip, cold, and flu relief.		Gemini Sterile Eye Drops	An Allergy Care eye drop that is utilised in the treatment of hay fever, conjunctivitis, allergic conjunctivitis, and sore, red or itching eyes.

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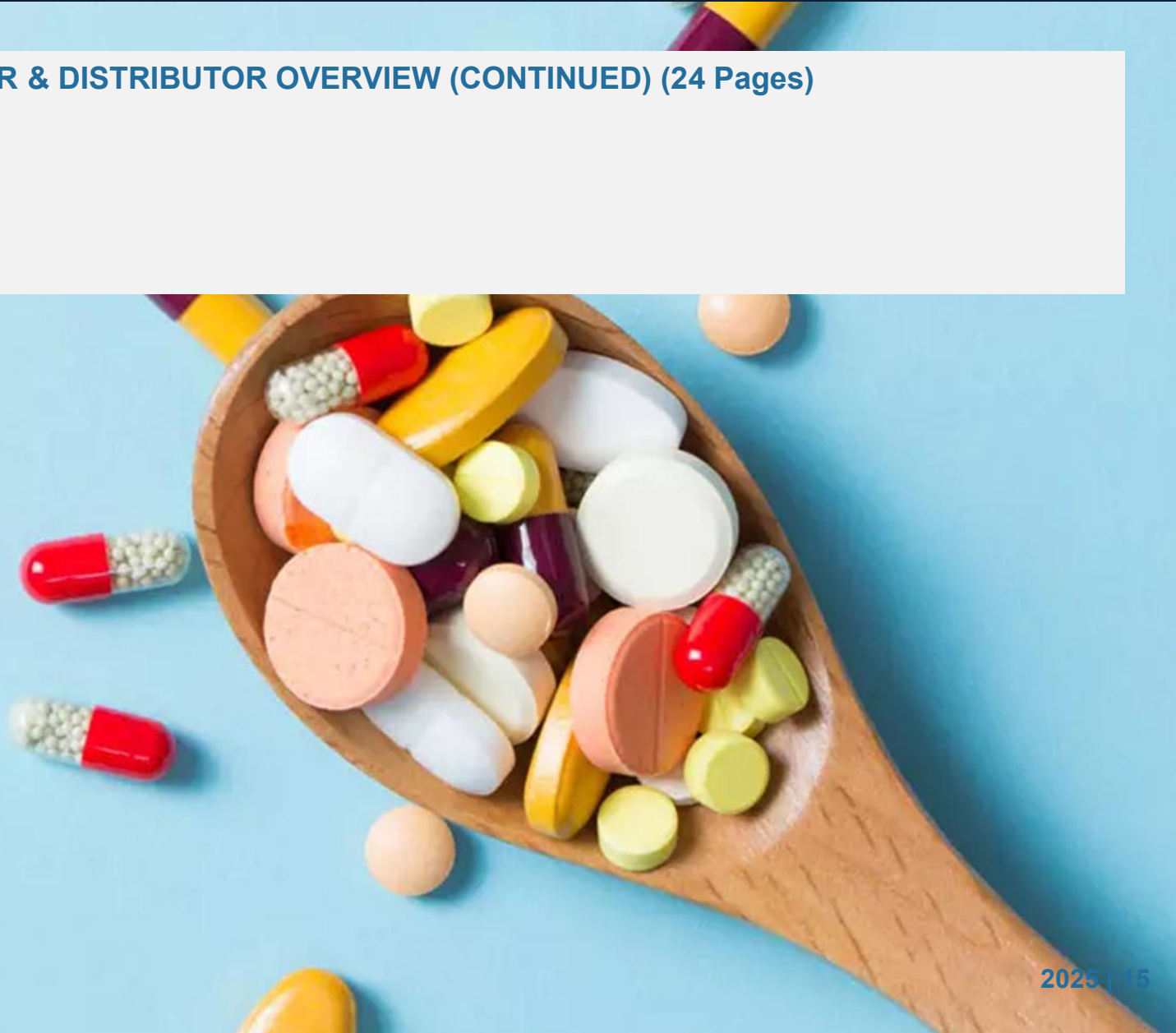


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– **Comparative Pricing at Clicks, Dis-Chem, MediRite, and Pharmacy at SPAR.**

4.2.2 Allergy Care Promotions: Clicks

4.2.3 Allergy Care Promotions: Dis-Chem

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