

# Upper GIs

## Investigating the Self-Care Market for Upper Gastrointestinals

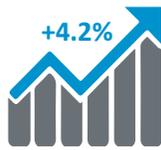


### Main features of the report

- An in-depth exploration of the Upper GIs market, including Antacids, Antiflatulents, Antinauseants, Digestive enzymes and Liver & bile remedies
- Landscaping 15 major markets from across the globe, with topline sales, brand performances, regulatory developments, launches and ad campaigns
- Mid-2017 sales from the newly-updated **DB6**, our dedicated OTC sales database
  - In-depth look at the latest scientific studies
  - Case studies of key brands, highlighting success factors, sales, NPD and A+P activity
  - Forecast sales for all categories and countries, plus a look to what the future holds

## Global Upper GIs sales by region & category mid-2017

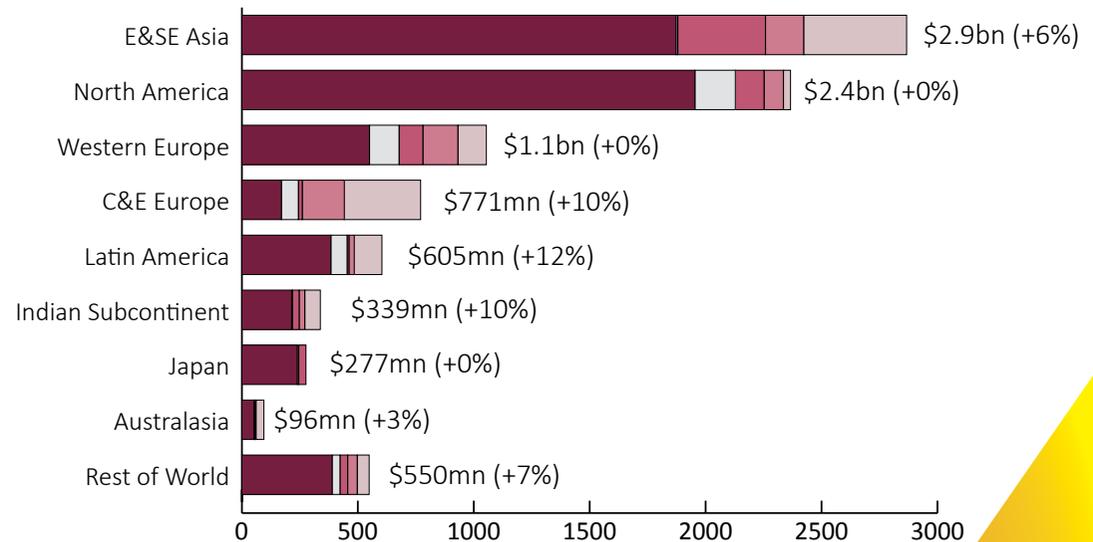
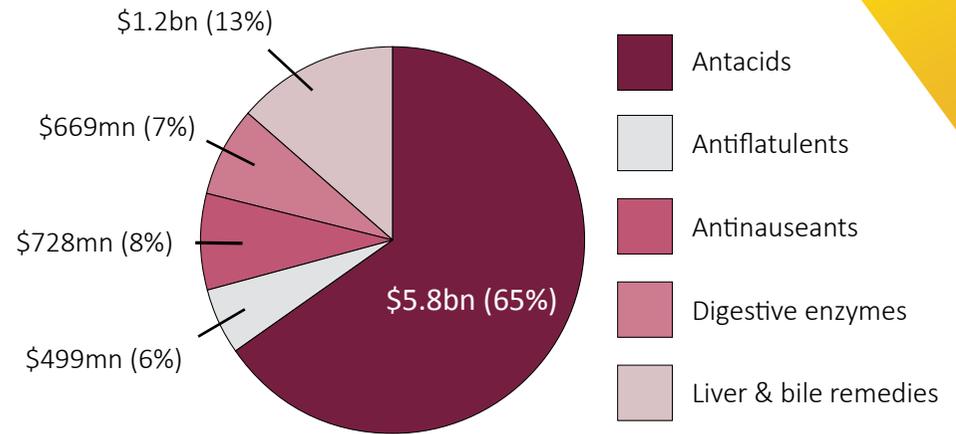
With global sales of \$8.9bn, the combined categories of Antacids, Antiflatulents, Antinauseants, Digestive enzymes and Liver & bile remedies grew by 4.2% in the year to mid-2017. The market remains strong thanks



to high-profile switch activity, A+P support and innovation, although competition from private labels & generics remains a significant threat.

Taking a look at the large antacids category (65% of upper GIs sales), it clearly faces challenges, but there are opportunities too. It is crowded, with traditional brands vying with newer PPIs in many markets, while H2 antagonists struggle to find a niche. PPIs provided a boost to the large US market, and have helped sustain growth in other markets like Australia and the UK, while in others they remain Rx and represent a potential switch opportunity. Meanwhile, traditional antacids are fighting back against the tide of newer brands, benefiting from lower price point and faster onset of action.

Another sizeable category, liver & bile remedies generated the vast majority of sales in Europe and E&SE Asia, where a wave of activity has driven strong growth and category development. Combating liver fatigue is a key focus in Japan and Korea, while an increasing MNC presence contributed to a sizeable upturn in China. The small but dynamic antinauseants category has weathered challenges such as increased restrictions on ingredients. Most popular in Europe, digestive enzymes are split between established pancreatin products, often positioned for overindulgence, and lactase products for patients with lactose intolerance.



### Key questions investigated in this report

- What are the key drivers of growth in Upper GIs, and where are the strongest opportunities for future growth?
- Which marketers and brands outperform the market, and what lessons can be learned?
- What role do NPD and Switch have to play in category expansion?
- In which markets are consumers responding to marketers' promotional messages?

All the factors affecting the Upper GIs market, from consumer trends and regulatory changes to promotional campaigns and launch activity, are highlighted.

Latest sales data will include topline historical sales for region, country and category, plus individual brand performances and forecasts to 2021 and 2026.

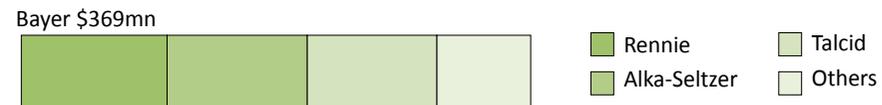
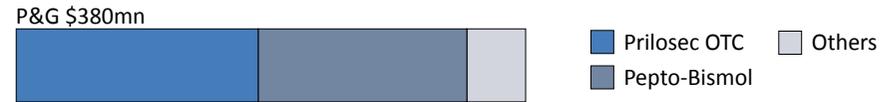
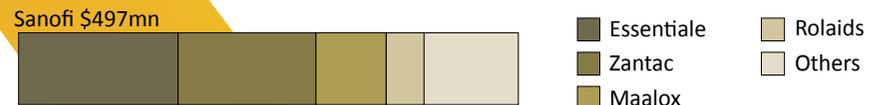
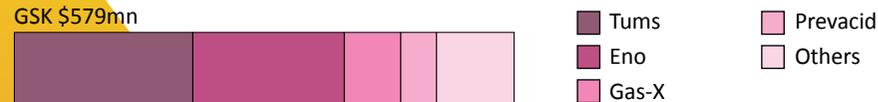
### Webinar on key findings



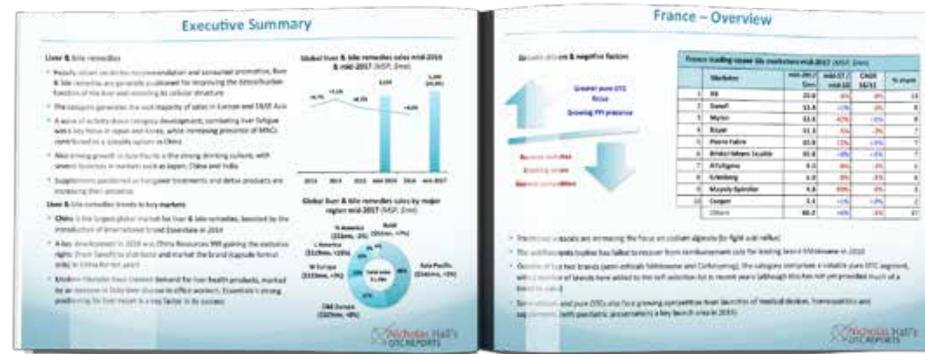
Purchase the global licence and gain access to a webinar in which the Nicholas Hall team will run through the key findings from the report.



# Top 5 Upper GIs marketers by leading brands 2016



The leading five Upper GIs players posted average growth of 3.2% in 2016, but there was wide disparity in the performances of players and their key brands. Discover how individual marketers and brands performed, both globally and in specific markets, and where the truly dynamic growth is coming from. Data analysis within each country profile includes a breakdown of antacids sales by segment. New product developments are explored across markets, as well as a look at promotional activity and the competitive environment from category to category.



## Main features of the report

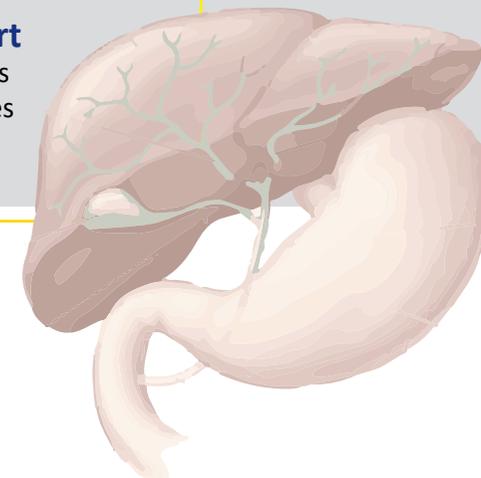
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## Categories covered by this report

- Antacids • Antiflatulents • Antinauseants
- Digestive enzymes • Liver & bile remedies



15 individual markets profiled in this report

- Asia-Pacific**
- Australia
  - China
  - India
  - Indonesia
  - Japan
  - S Korea

- Americas**
- Brazil
  - Canada
  - USA

- Europe**
- France
  - Germany
  - Italy
  - Poland
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# UPPER GIs

## Japan – Antacids

Colgate grew, with 2014 launch Colgate True White toothpaste sales, the extension, which adds herbal ingredients for the care mouth/mint/whitening solution choice brands to repair gum/mouth, has become the no-rinsing presentation.

Alpha presentation was extended in October 2016 with a genuine normal (see right), promoted via TV ads featuring office workers facing an all-convenience and ease of use (see below).

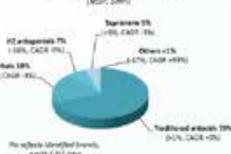


Tablet presentation was extended with a convenience sized 15-count SRV in 2016, smaller and lower priced than existing 30, 60 and 90-count packs.

Online promotion includes a partnership with restaurant directory Takeaway, positioning the brand as a suitable treatment for gastrointestinal problems caused by overindulgence while eating out.

Tablet's range of L-amino-based alginate remedies are promoted to party goers as suitable for symptoms of overindulgence; brand is intended to be taken before and between meals rather than after eating.

Japan antacids sales by segment 2016 (MSP, \$mil)



The next largest brands, worth \$23.5m

Nicholas Hall's  
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## Scientific studies

### Liver health

- Non-alcoholic fatty liver disease (NAFLD) is a term used to describe the abnormality of the liver (used for income tax purposes) (see our report NAFLD is linked with overweight and obesity).
- Obesity has tripled since 1975 (according to the World Health Organisation) and in 2016 more than 2 billion adults were overweight.
- Main health issue often brought to mind when thinking about, yet NAFLD is the most common liver problem in the Western world; obesity is also known to worsen the severity of viral-induced liver disease.

### Curcumin

- A 2017 study published in Drug Research found that phytochemical curcumin supplementation may reduce biomarkers for liver damage in people with NAFLD; the multi-institutional team allocated 100 NAFLD patients to Curcumin 1,000mg per day or placebo for eight weeks.
- The curcumin group showed reductions in both waist size and BMI, with an improvement in their ultrasonographic findings; were enrolled in 70% of the group of placebo (17%); additionally, liver damage markers were reduced in the curcumin group and elevated in the placebo group.
- Research in 2016 (published in Phytotherapy Research) also supported the use of curcumin 1000mg NAFLD patients with ultrasonographic evidence of NAFLD were assigned a 200mg curcumin (dependent to curcumin 10mg) or placebo every day for eight weeks.
- Results positively found the curcumin group was associated with a reduction in liver fat content, BMI, total serum cholesterol and liver damage biomarkers.



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  - Case studies of key brands
- A look at the key drivers of growth in Upper GIs
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Please contact [owen.hartnett@NicholasHall.com](mailto:owen.hartnett@NicholasHall.com) for more information about this report or visit our website (<http://bit.ly/UpperGIs>) where you can view / download the full Table of Contents and sample pages.

# Nicholas Hall Group of Companies offers the world's most complete consumer healthcare marketing & business solutions

Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in consumer healthcare, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

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### Nicholas Hall's OTC YearBook 2018

Pre-order Nicholas Hall's bestselling unique reference book which contains comprehensive market data through December 2017 drawn from our **DB6** Global OTC database.

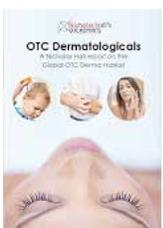
Publish date: April 2018



### Cold & Flu

An in-depth exploration of the OTC Cold & Flu market, including Systemic cold & flu, Topical decongestants and Chest rubs & inhalants, plus VMS brands positioned for immunity.

Publish date: August 2017



### OTC Dermatologicals

Covering categories as diverse as acne remedies, antifungals, wound care, cold sore treatments, eczema, lip care and hair loss, this essential report covers OTC Derma across 15 major markets.

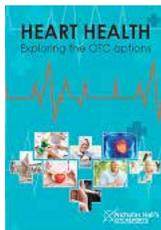
Publish date: November 2016



### Rx-to-OTC Switch

Shining the spotlight on the switch procedure itself, and the regulatory hoops that must be jumped through to turn an Rx product into a successful OTC brand, the report aims to equip readers with a greater understanding of the ins & outs of switch.

Publish date: December 2017



### Heart Health

More people die annually from cardiovascular diseases than from any other cause. This report takes an in-depth look at the self-care options, giving insight into the latest trends with detailed market analysis.

Publish date: June 2017



### Eye Health

Eye Health is a market driven by innovation, environmental factors, an ageing population and changing lifestyles, making it a fascinating topic for this new report, covering 14 leading markets.

Publish date: September 2016



### Analgesics

Systemic analgesics, Topical analgesics and Mouth & dental analgesics, plus supplements positioned for pain relief are analysed in this report, including coverage of 16 major markets globally, with topline sales, new developments, launches and A+P campaigns.

Publish date: October 2017



### Healthy Ageing

With the population structure shifting to a new dynamic and the proportion of those aged over 50 steadily increasing, it's essential that OTC marketers cater to the specific health needs associated with older age.

Publish date: February 2017



### Vitamins, Minerals & Supplements

Dedicated to the largest consumer healthcare category, this report breaks down the global VMS market into detailed country profiles, with analysis of regulatory changes and their implications.

Publish date: July 2016

## Get in touch!

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