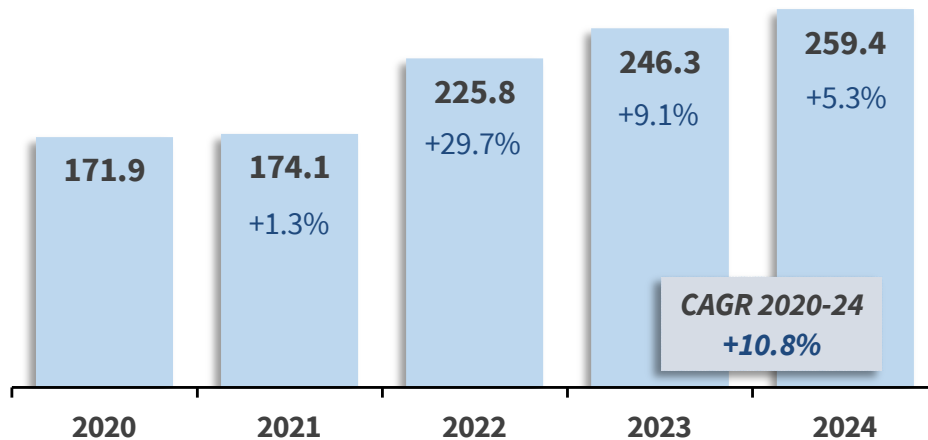


# Germany | Topical decongestants

Germany topical decongestants sales 2020-24 (MSP, \$mn)



- Xylometazoline-based options dominate the topline, led by **Ratiopharm Nasen** which bounced back in 2024 from temporary supply issues at end-2023; stablemate **NasenDuo** (with added dexpanthenol) relaunched with updated packaging in February 2025
- Trade and digital ads for **Nasic** focus on the Neo version (with added dexpanthenol and hyaluronic acid; \$1.8mn, -16%) and promised it is “Effective from the first spray!”, although the core presentation (\$22.1mn, -9%) still accounts for the bulk of sales; promotion highlights that the brand is made in Germany, and actively helps the nose to heal



- Nasic extended with Saline Duo (hypertonic saline solution, dexpanthenol; medical device) in April 2025, positioned as a gentler means of relieving nasal congestion and promoting moisture in the nasal mucosa
- Generic **Nasen AL** offers a low-priced alternative to the main xylometazoline brands
- **Olynth** is backed by digital ads that highlight its action to unblock the nose within 2 minutes and for up to 12 hours in the whole family

## Key trends & developments

- Xylometazoline nasal sprays remain dominant (Top 6 brands) but strong generic penetration dampens value growth; nasal sprays & drops remain most popular format, with balms, ointments and gels more niche
- No category expansion via Rx-to-OTC switch recently, with suggested switch of xylometazoline + ipratropium bromide combinations for intranasal application rejected in 2022
- NPD included extensions of two brands with hypertonic saline options, claiming to be gentler, and Germany’s first nasal spray formulated with N-acetylcysteine



# Brazil | Systemic cold & flu

- Hypera also invests in high-profile family-themed event sponsorships to reinforce its brand association with family
- July 2023 saw brand participate in the Família no Parque event and subsequently the Rock in Rio festival in September 2024



- February 2023 saw Hypera expand its **Blumel** range of natural children's products with Blugrip Pelargonium; suitable from 6 years, the drops is formulated with pelargonium sidoides DC and claimed to promote an improved immune response in the treatment of cold & flu
- TV ads showcased the new launch alongside Blumel Hedera cough syrup (ivy extract), Blusoro Jet topical decongestant and Blumel Imune Kids oral solution (vitamins A, C & D, zinc, selenium), marketed as “a complete line in caring for children's flu, colds and immunity”

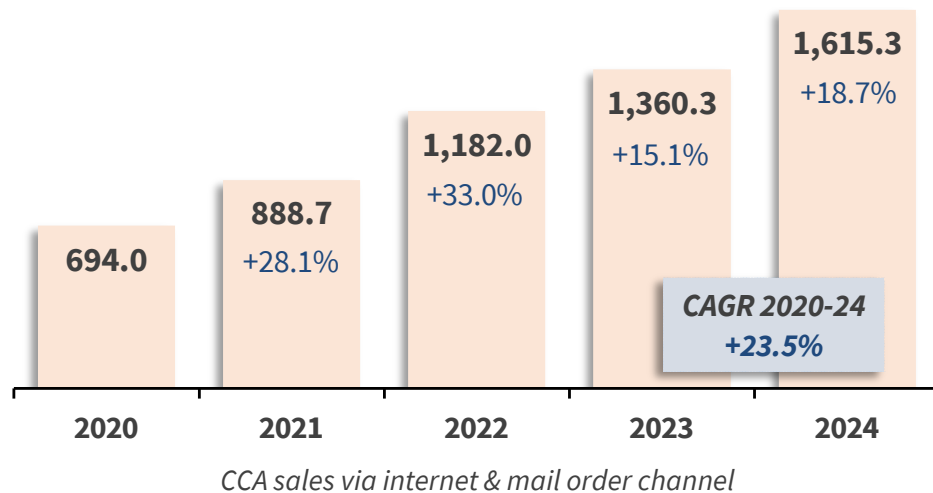


Brazil leading systemic cold & flu remedies 2024 (MSP, \$mn)				
	Brand	\$mn	24/23	CAGR 24/20
1	<b>Benegrip</b> (Mantecorp / Hypera Pharma)	<b>44.8</b>	+15%	+15%
2	<b>Coristina D PRO</b> (Mantecorp / Hypera Pharma)	<b>17.0</b>	+13%	+11%
3	<b>Cimegripe</b> (Cimed)	<b>14.6</b>	+10%	+15%
4	<b>Naldecon</b> (Reckitt)	<b>11.0</b>	+16%	+3%
5	<b>Resfenol</b> (Hertz Medicamentos / Hertz)	<b>10.9</b>	+11%	+11%
6	<b>Multigrip</b> (Multilab / NC Farma)	<b>9.5</b>	+13%	+16%
7	<b>Vick Pyrena</b> (P&G)	<b>8.1</b>	+9%	+17%
8	<b>Neolefrin</b> (Neo Química / Hypera Pharma)	<b>8.0</b>	+13%	+16%
9	<b>Apracur</b> (Hypera Pharma)	<b>6.4</b>	+10%	+20%
10	<b>Gripalce</b> (Brasterapica)	<b>4.0</b>	+7%	+13%
	Others	<b>23.5</b>	+15%	+19%

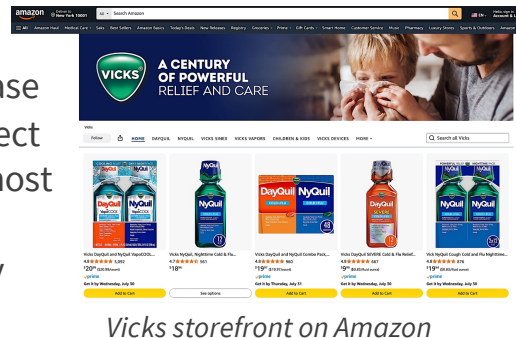


# USA | Internet & mail order channel

## USA internet & mail order CCA sales 2020-24 (MSP, \$mn)



- Brand websites generally offer consumers the means to purchase their products online, either direct from the brand website, or, in most cases, by directing them to the websites of the major pharmacy chains or Amazon
- Vast majority of leading brands have extensive storefronts on Amazon, offering wide range of products, information on health conditions and consumer discounts, alongside general promotional material
- Amazon sells range of own-brand “Basic Care” OTCs (see right), covering most CCA categories & ingredients



## Key trends & developments

- E-commerce sales more dynamic than store sales 2020-24
- However, survey conducted by YouGov in 2024 shows that a significant share of respondents (66%) prefer to buy medicines traditional way by going in person to pharmacies

## USA leading CCA brands via internet & mail order channel 2024 (MSP, \$mn)

	Brand	\$mn	24/23	CAGR 24/20
1	<b>Vicks</b> (P&G)	<b>107.5</b>	+4%	+27%
2	<b>Mucinex</b> (Reckitt)	<b>87.2</b>	+9%	+32%
3	<b>Zyrtec</b> (Kenvue for UCB)	<b>71.0</b>	+26%	+19%
4	<b>Primatene</b> (Armstrong / Amphastar)	<b>64.0</b>	+52%	+46%
5	<b>Flonase</b> (Haleon)	<b>45.6</b>	-4%	+15%
6	<b>Boiron</b> (Boiron)	<b>45.1</b>	+34%	+17%
7	<b>Claritin</b> (Bayer)	<b>42.4</b>	+3%	+2%
8	<b>Allegra</b> (Opella)	<b>30.4</b>	+6%	+10%
9	<b>Benadryl</b> (Kenvue)	<b>28.4</b>	+35%	+19%
10	<b>NeilMed</b> (NeilMed)	<b>26.4</b>	+14%	+13%
	Private labels	<b>246.5</b>	+17%	+24%
	Others	<b>820.7</b>	+22%	+26%



- Lower-tier **Zandu Chyawanprash** (Emami Group, \$25mn, -0.4%) has similar “2x immunity” claims and year-round use recommendations as Dabur’s entry
- It also benefits from a significant online presence via online store zanducare.com, which offers a wide range of immunity products including turmeric supplements, giloy extract for immunity and liver health and ayurvedic antiviral Chirakin Tablets

India leading chyawanprash brands 2024 (MSP, \$mn)				
	Brand	\$mn	24/23	CAGR 24/20
1	<b>Dabur Chyawanprash</b> (Dabur)	<b>250.8</b>	-1%	+2%
2	<b>Baidyanath Chyawanprash</b> (Baidyanath)	<b>41.4</b>	-4%	-1%
3	<b>Zandu Chyawanprash</b> (Emami Group)	<b>25.2</b>	+0%	+2%
4	<b>Sona Chandi Chyawanprash</b> (Emami Group)	<b>15.2</b>	+0%	+10%
	Others	<b>20.7</b>	-2%	+4%

India leading vitamin C supplements 2024 (MSP, \$mn)				
	Brand	\$mn	24/23	CAGR 24/20
1	<b>Limcee</b> (Abbott)	<b>20.3</b>	+2%	+11%
2	<b>Celin</b> (RV Lifesciences)	<b>14.1</b>	+6%	+23%
3	<b>Zu-C</b> (Emcure)	<b>9.3</b>	+4%	+56%
4	<b>Immuc Plus</b> (Mankind Pharma)	<b>3.2</b>	+7%	+36%
	Others	<b>13.0</b>	+2%	+18%

- **Vitamin C** segment benefits from high levels of consumer trust in the ingredient as found by a 2024 study by Abbott and IPSOS; almost two-thirds of Indian consumers associate vitamin C supplements with immunity and recovery from illness

- Marketing for leading brand **Limcee** has simple tagline of “Helps boost immunity”
- Lower tier entries such as **Zu-C** and **Immuc Plus** have combination formulas, adding zinc to support immunity positioning

