

# China – Sore throat remedies & medicated confectionery

- **Yangtze River Lanqin Koufuye** posted double-digit growth, jumping to No.3 spot (from No.8); it is a popular choice for drugstore chains to promote, as its premium price generates a high profit margin
- **Man Yan Shu Ning Qing Hou Li Yan** is already a popular online purchase, reports stating it was a big seller during the Singles' Day (11th November) online shopping festival; a dedicated flagship store opened on JD.com in 2017
- 2017 saw RB partner with a Chinese mobile app (*see box*) which will deliver the product to its users within half an hour, offering rapid relief for sore throats caused by smog
- 2016 saw brand packaging revamped, using different colours to better distinguish between options, while 2017 TV ads featured animated firefighter mascots designated to protect throat health
- British medicated confectionery brands **Fisherman's Friend** and **Halls** grew well, although are largely bought and sold as sweets



Man Yan Shu Ning Qing Hou Li Yan:  
new design (right)

- Products benefit from their reputation as established foreign brands, popular with Chinese consumers

## RB takes steps to strengthen e-commerce presence and enhance innovation

- November 2017 saw RB sign a strategic co-operation agreement with Alibaba's e-commerce platform Tmall Global
- The agreement will see the companies collaborate on branding and marketing, with RB to use Alibaba's data to better understand trends in the country, leading to the development of new and innovative products
- 2017 also saw RB collaborate with mobile app Dingdang Kuaiyao, through which users could receive Man Yan Shu Ning Qing Hou Li Yan within half an hour
- RB also entered a non-binding memorandum of understanding with China Resources Sanjiu in 2016 to explore "a strategic co-operation between the respective groups in relation to certain designated OTCs, medical devices and healthcare products"

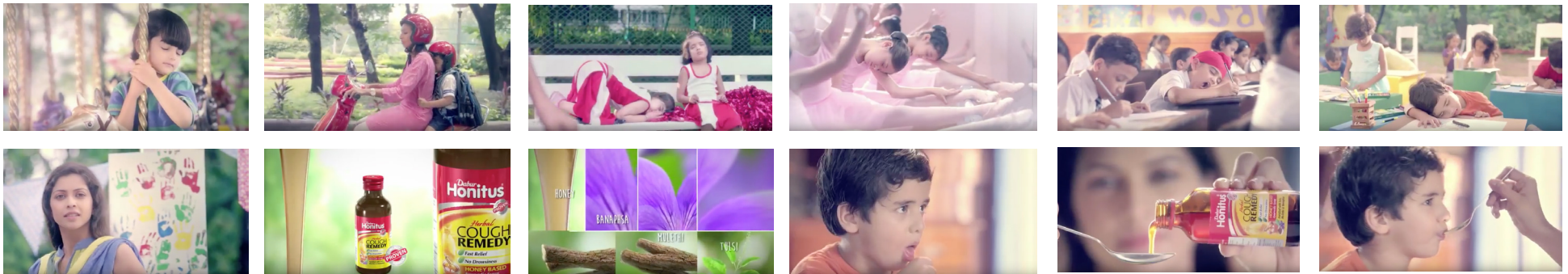
# France – Cough remedies

- Phytosil is a medical device formulated with plantain, thyme and honey and positioned to relieve wet and dry cough in those aged 2+ years; TV ads in 2017-18 (*see right*) claimed 91% of users were satisfied with the product
- Brand was initially marketed as Toplexil Phyto, although name was changed to Phytosil in early 2017, perhaps to differentiate it from medicated line-up in wider brand
- Aboca's **GrinTuss** had a strong year in 2017, with sales more than doubling to \$1.8mn; the natural product is positioned for wet and dry cough, and is available as tablets and syrups suitable from 12+ years and a paediatric syrup suitable from 1+ year
- Laboratoires Gilbert launched a range of nine homeopathic soluble granules in 2016, with cough & cold options including **HoméoRub** (for cough) and **HoméoQuintyl** (for dry / irritable cough)
- Also in 2016, Laboratoires 3 Chênes launched **Sédatusil Sirop** (plant extracts), claimed to relieve all types of cough, and can be used from age 3+ years
- In September 2017 Recordati launched **Hexatoux Spray**, a medical device formulated with calendula, propolis, eucalyptus, honey and linseed oil
- Brand claims to have quick-action formula that soothes throat and reduces inflammation and irritation
- Concerns over efficacy have hampered the cough remedies market, with a November 2015 study of 37 OTC cough remedies by *60 Millions de Consommateurs* magazine concluding that more than half of those studied were ineffective, while certain options posed more risks than benefits



# India – Cough remedies

- Concerns over safety of allopathic formulations, coupled with uncertainty created by FDC issue, provided a boost to herbal & natural cough remedies, with more ayurvedics marketers looking to enter category to leverage the opportunity
- One ayurvedic brand already well established is **Honitus**, which benefits from high-profile consumer A+P
- Promotional strategy changed in 2016, with a different company being appointed for creative duties
- TV ads are now more humorous, with one in 2017 showing children falling asleep in various situations – e.g. at a funfair, in school, on the back of a moped, at ballet classes – and highlighting that Honitus does not cause drowsiness (*see below*)



- In 2016 **Central Institute of Medicinal & Aromatic Plants** released a herbal cough syrup positioned for allergic cough
- Developed over four years of research, it is formulated with three herbs: tulsi (holy basil), kantakari (Thai eggplant) and dalchini (cinammon)
- Keva Industries introduced **Keva Cough Syrup**, which boasts a non-drowsy formulation of natural ingredients such as honey, ginger and liquorice to relieve cough and other cold & flu symptoms
- In April 2018 century-old marketer **Baidyanath** announced it was planning to launch ayurvedic cough syrups as a means to achieve sustainable growth

# Japan – Sore throat remedies & medicated confectionery

- **Isodine** (marketed internationally as Betadine) is still recovering from effects of 2016 change of ownership; Shionogi acquired the rights to Mundipharma's brand from Meiji Seika Pharma, and resulting disruption has been reflected in a downturn in sales
- At the time of ownership transfer, Meiji filed a petition in the Tokyo District Court to stop Shionogi and Mundipharma continuing to use brand's hippopotamus logo so Meiji could use it on its own similarly-formulated product; in response to this, Mundipharma changed Isodine's logo to feature dog mascots
- Povidone iodine range is well-diversified across gargles, sprays and medicated mouthwash, and benefits from visibility of wider Isodine range (which includes antiseptic wipes and personal care options)
- New A+P strategy, including TV ads featuring brand ambassador Aya Ueto and partnership with football team the Yokohama F Marinos, has helped sales revive
- **Pelack-T**, part of the Pelack cold & flu range, combines tranexamic acid, liquorice and vitamins B and C to treat sore throat and stomatitis
- Promotional site explains the benefits of tranexamic acid over non-medicated lozenges and explains the various causes of sore throat

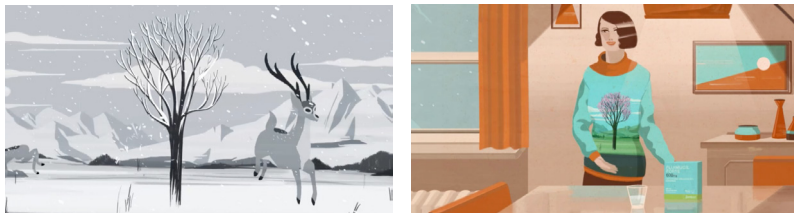


- Longline cough & cold range **Colgen Kowa** also includes lozenges (cetylpyridinium chloride, glycyrrhizinate, senega) and a sore throat gargle (cetylpyridinium chloride, glycyrrhizinate, menthol, clove and peppermint)
- Current A+P focuses on teaching oral hygiene and proper use of gargle products to children via partnership with parenting website Conobie (*see left*)



# Spain – Cough remedies

- Range is also promoted via internationally-used TV ad campaign “Winter outside, spring inside”; a snow scene on a woman’s jumper changes to spring to depict the brand’s effects



- As well as core acetylcysteine range, line extension Fluimucil Complex adds paracetamol to relieve pain and fever



- Stablemate **Flutox** (cloperastine) is positioned for dry cough, with ads using the tagline “Specialist in dry cough”

- Despite extensive line extension, **Bisolvon** remains in decline in part as a result of its comparatively high price; unlike Flui mucil and Flutox, range includes products for wet and dry cough under the same banner as well as systemic cold & flu products (*not tracked here*), latter growing steadily

Spain leading cough remedies 2017 (MSP, \$mn)				
	Brand	\$mn	2017/16	CAGR 17/13
1	<b>Fluimucil</b> (Zambon)	<b>21.8</b>	+2%	+9%
2	<b>Flutox</b> (Zambon)	<b>17.2</b>	+2%	+11%
3	<b>Bisolvon</b> (Fher / Sanofi)	<b>11.8</b>	-5%	-1%
4	<b>Cinfatos</b> (Cinfa)	<b>10.1</b>	+5%	+7%
5	<b>Grintuss</b> (Aboca)	<b>10.0</b>	+14%	+41%
6	<b>Mucosan</b> (Fher / Sanofi)	<b>7.7</b>	+2%	+3%
7	<b>Iniston</b> (J&J)	<b>6.4</b>	-1%	+0%
8	<b>Prospantus</b> (Ferrer for Engelhard)	<b>5.4</b>	+21%	+24%
9	<b>Romilar</b> (Bayer)	<b>4.6</b>	-5%	+4%
10	<b>Actithiol</b> (Almirall)	<b>4.0</b>	+3%	+5%
	Others	<b>10.6</b>	-3%	-1%



# UK – Cough remedies

- Accompanying social media campaign used hashtag #FeelThePower and included competitions to win Covonia products and merchandise



Banner ad featured on Covonia's website homepage, reinforcing the image of a powerful treatment

- Media reports suggest £4mn (\$5.4mn) was invested in national advertising in the run-up to 2016/17 cold & flu season
- Late 2017 saw launch of potential competition, **Natures Aid Herbal Catarrh Relief Formula** (Thornton & Ross / Stada), essentially a rebranded, lower-cost version of Covonia Catarrh Relief Formula
- Initially enjoying dynamic growth since 2014 launch, non-medicated **Bronchostop** struggled for sales in 2017 after the ASA declared a TV ad must not appear again in its current form
- Promotional support for the brand included outdoor and TV ads emphasising its efficacy against all types of cough, offering comprehensive relief in a single product vs competitors that target only specific symptoms
- ASA upheld complaints that on-screen text for the TV ad was not clearly legible and consumers were therefore more likely to miss material information within it; add-on for TV ads (prior to ASA ruling) featured line extension Bronchostop Cough Pastilles, stressing they were voted Product of the Year 2016

UK cough remedies sales by ingredient 2017  
(MSP, \$mn)

