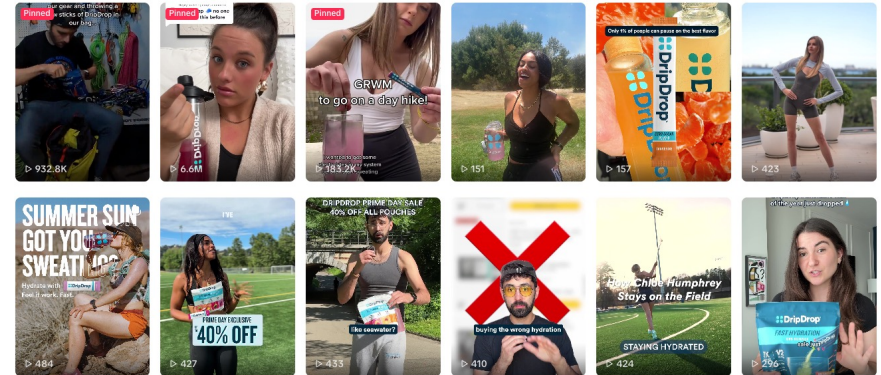
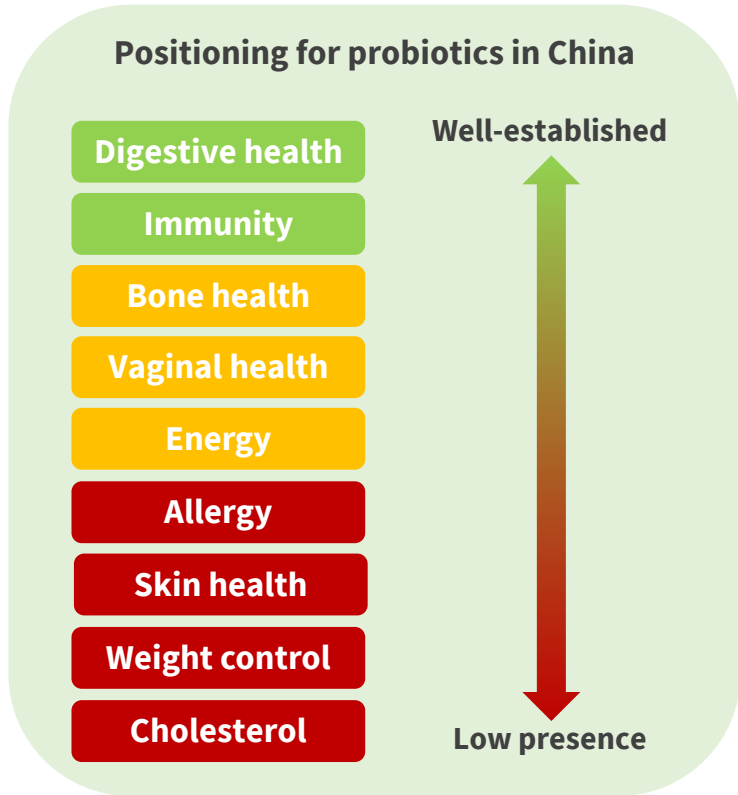


- **DripDrop** was extended in 2024 with Zero Sugar drink mix sticks, accompanied by a digital-first ad campaign featuring motivational speaker and Peloton instructor Kirsten Ferguson as brand ambassador; subsequent launch activity included new flavours and variety pack SKUs
- Social media promotion includes an active TikTok and Instagram presence; a pinned video from 2023 reacting to criticism of the brand has reached over 6mn views
- Zero Sugar portfolio was further extended in December 2025 with Zero Sugar Plus, containing “3x the electrolytes of the leading sports drink” alongside vitamins, minerals and amino acids
- Brand’s retail presence was also expanded in 2025 via expansion into Costco stores, including rollout of a Zero Sugar Lemon-Lime + Watermelon version
- **BodyArmor** is growing well, with a limited-edition line extension in mid-2025 focusing on “impossibly cold” sensation in response to summer high temperatures and 2024 seeing launch of a caffeine-enriched presentation for energy
- Lower-tier launches are increasingly focusing on secondary or adjacent benefits to stand out, such as 2025 launch **Unwell Hydration** from Alex Cooper’s “Call Her Daddy” podcast brand; a proprietary formula with green tea extract is claimed to support focus and aid recovery



- **Ultima Daily Focus** (Ultima Health, December 2025), part of the Ultima brand, is also positioned for concentration and mental focus with added l-theanine, caffeine and antioxidants
- Kinderfarms’ **Kinderlyte** stands out via 2026 launch of Plus range comprising Gut Health prebiotic and ORT combination and Immune Support, with added zinc, magnesium and elderberry extract
- **Maeva Probiotic Electrolyte** (Maeva, January 2026) is a probiotic-enriched ORT specifically positioned to support users of GLP-1 weight loss treatments



Improve bowel movements in 3 days

- Three powdered probiotics drinks for children followed in 2025, for gut health, immunity and allergy management; this followed a notable increase in consumer awareness of the importance of intestinal health and parental interest in children’s healthcare products with specific and visible benefits such as bowel movement and allergy management

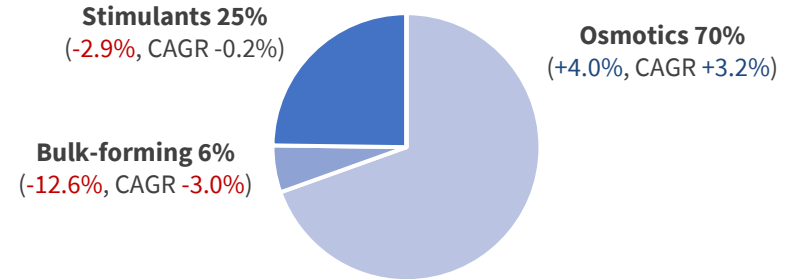
China leading probiotics 2025 (MSP, \$mn)				
	Brand	\$mn	25/24	CAGR 25/21
1	Biostime (Health & Happiness)	115.6	+1%	-4%
2	Mechangan / Ma Mi Ai (Beijing Hanmi / Hanmi)	108.0	+4%	+2%
3	Lihuo Lacidophilin (CR Jiang Zhong)	70.9	-7%	+6%
4	Bifico (Shanghai Sine / Shanghai Pharma)	57.7	+3%	+4%
5	Zheng Chang Sheng (Northeast Pharmaceutical)	32.5	-4%	-3%
6	Golden Bifid (Shenyang No.1 Pharma / Inner Mongolia Shuangqi)	31.4	-1%	+6%
7	A Tai Ning (Qingdao EastSea)	23.1	+0%	+1%
8	Hayao No.6 Weixiao (Hayao No.6 / Harbin Pharmaceutical Group)	22.2	+5%	+7%
9	Ju Ke (Mei Tong)	15.0	+9%	+11%
10	Changle (Livzon Group / Shenzhen Joincare)	11.9	+2%	+2%
	Others	140.2	+6%	+7%

Germany | Laxatives

- In the modest psyllium segment – where some pure psyllium options are registered as foods rather than supplements or OTCs – results were mixed; leading OTC-registered option **Mucofalk** dominates, but saw sales decline
- Food-registered options like **Doppelherz Aktiv** and **Doppelherz Pure** (Queisser), **Dr Groß Flohsamenschalen** (Dr Groß; \$0.5mn, +87%) and **Avitale Flohsamenschalen** (Avitale; \$0.5mn, +6%) advanced organically to outperform OTCs such as Mucofalk and Cooper CH’s **Agiolax** (\$0.8mn, -1%)
- However, Apomedica’s supplement-registered **Dr Böhm Darm Aktiv** (\$0.7mn, +199%) was a standout, more than doubling its sales since launch in September 2024; the fruit-flavour soluble sachets (five plant-based fibres [incl. psyllium husk powder], caraway, magnesium, biotin) are claimed to stimulate intestinal activity and promote gentle bowel movements
- Brand benefited from trade A+P boasting “The solution for hard stools”
- Demand here may have been boosted by increasing use of GLP-1 agonists and the “fibermaxxing” social media trend, both likely to be key drivers of the bulk-forming segment in the coming years
- After growing strongly to No.2 in the bulk-forming segment, **Kijimea Regularis** (SYNformulas / Futrue; methyl cellulose) dipped in 2025, despite 2023 launch of Plus version (with added psyllium)

Germany laxatives sales by segment 2025

(MSP, \$mn)

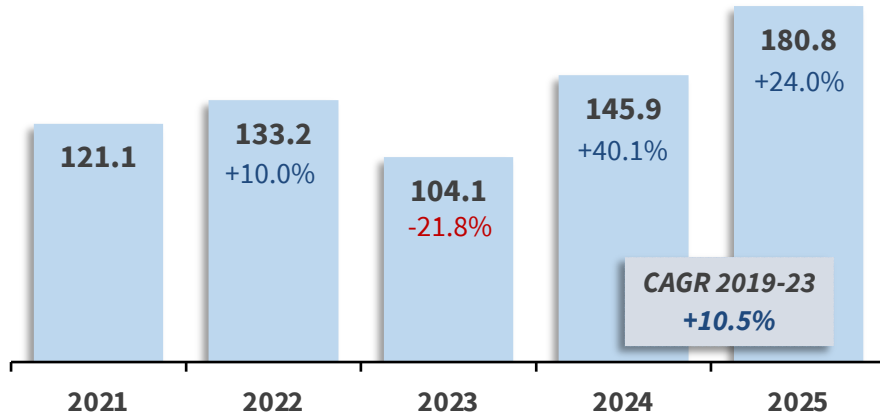


- Following Alfasigma’s establishment of a consumer healthcare division in Germany in March 2025, the marketer rolled out **Onligol** laxative, available as Macrogol 4000 powder (medical device; for constipation) and Fiber plum-flavour soluble sachets (supplement; psyllium, lactase, alphagalactosidase; to support digestion)

- Among limited other NPD activity, the wide SOS range was extended with **SOS Verstopfung** (Districon / Windstar) glycerin suppositories at end-2025



Iberogast sales 2021-25 (MSP, \$mn)



Includes retail sales via stores, plus internet & mail order sales; growth rates are % change on previous 12 months

- Bayer significantly expanded Iberogast’s geographic reach in 2024 through a major US launch, introducing the brand in liquid drops and softgel formats, the latter specifically developed in response to US consumer demand for convenient, on-the-go digestive options
- Iberogast is positioned as a multifunctional digestive remedy, with claims spanning indigestion, bloating, fullness, heartburn, nausea, abdominal discomfort, constipation and diarrhoea, allowing it to compete with brands across multiple GI categories

Key facts

- Originally developed in Germany more than 60 years ago, Iberogast has become one of the world’s leading herbal digestive remedies and remains a flagship brand within Bayer’s global GI portfolio
- The brand differentiates itself through its multi-herb formulation, which is positioned to restore normal digestive function and address a broad range of GI symptoms rather than targeting a single cause
- Marketing consistently emphasises Iberogast’s science-led heritage, with messaging highlighting decades of clinical research and the brand’s positioning as being “Powered by Nature, Rooted in Science”



- Recent advertising and promotion have focused heavily on digital and educational messaging, with Bayer using consumer websites, social media and HCP engagement to build awareness of the long-established European brand among new consumers; social media posts showcase the CEO interviewing scientists to uncover the science behind the products
- TV ads in USA focus on the brand’s fast-acting liquid format and natural, science-backed credentials, positioning the product as a solution for indigestion, bloating and other digestive issues