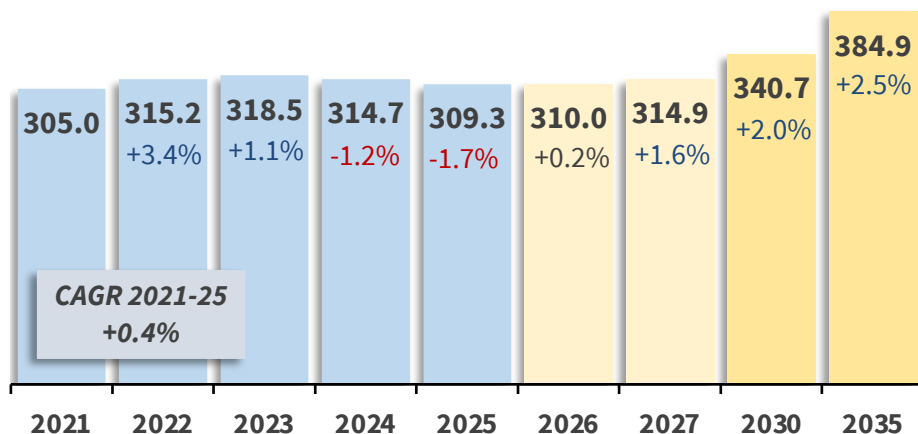


USA feminine intimate care sales 2021-25,
plus forecasts (MSP, \$mn)



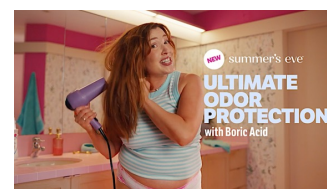
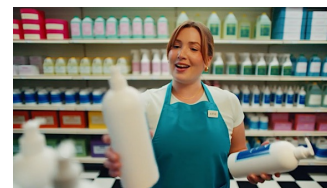
Key trends & developments

- Sales fell 2024-25, with e-commerce (*sales not tracked here*) popular owing to price deals and potential embarrassment factor associated with certain intimate conditions
- Competition in menopausal intimate skin health increased following Unilever's launch of Dove Women's Wellness range and Joylux's launch of Juicy Like a Peach (backed by actress Halle Berry)
- Consumer promotion for leading brands often humorous and taboo-busting, focusing on sex, gender and relationship issues

- Summer's Eve** leads via comprehensive line of cleansing & refreshing washes and wipes, with the marketer highlighting key selling points vs non-specialised hygiene products, e.g. that it is pH-balanced and clinically-tested for use on intimate skin



- NPD activity for the brand is frequent, such as the spring 2024 launch of boric acid-based Ultimate Odor Protection Daily Refreshing Spray, Wash and Wipes, which featured prominently in a new national A+P campaign inviting active, hard-working women to "Wipe the day from your vajay"; the 360° integrated marketing plan included digital advertising, retail displays, strategic partnerships, social media content and consumer sampling initiatives



- 2025 saw the launch of Ultimate Odor Protection Whole Body Deodorant Cream in Fresh Scent, Simply Sensitive and Blissful Escape versions, formulated with ViaFresh acidified formula and designed for odour control in intimate area as well as other body areas such as armpits; TV ads stated "Made for there. Good for anywhere"

Short-term forecast: Steady growth centred on key brands

- All categories are projected to grow, with online channel set to benefit the most as Chinese consumers are increasingly making the switch to e-commerce over pharmacies
- Strongest-performing category will remain hair loss treatments, driven by NPD and high levels of demand especially among younger consumers concerned about stress-related hair loss
- Sizeable antifungals category will see only slow growth as consumers remain resistant to concept of self-medication for fungal conditions
- It is likely environmental factors will continue to contribute to incidence of fungal infections but without a significant shift in attitudes this will not be reflected in the topline
- It is unlikely that any brand will significantly challenge dominant leaders in mature categories such as antiseptics & disinfectants and haemorrhoid preparations
- In the former, Dettol's commanding position is a result of brand's household name status and established presence outside of dermatologicals in household care and hygiene
- Social media and e-commerce outlets will remain the main avenues for brand communication, with both domestic and international marketers investing heavily in dedicated brand storefronts to maximise visibility in a crowded market

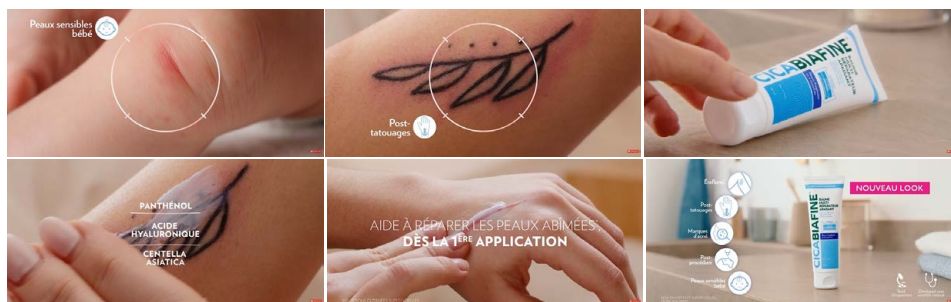
China derma short-term forecast sales by category 2026-27 (MSP, \$mn)

2026	2027	
5,133 (+4.3%)	5,395 (+5.1%)	
180 (+3.1%)	187 (+4.2%)	Acne remedies
525 (+4.0%)	547 (+4.2%)	Haemorrhoid prep.
882 (+0.8%)	900 (+2.1%)	Antifungals
534 (+2.5%)	553 (+3.5%)	Anti-itch
560 (+5.5%)	590 (+5.3%)	Antiseptics
399 (+4.9%)	420 (+5.4%)	Wound healers
163 (+4.7%)	171 (+4.5%)	Scalp treatments
207 (+10.0%)	224 (+8.5%)	Hair loss treatments
413 (+1.3%)	422 (+2.2%)	Intimate care
350 (+4.3%)	366 (+4.5%)	Other derma*
922 (+8.5%)	1,016 (+10.2%)	Internet & mail order
2026	2027	

* incl. cold sore treatments, wart & verruca treatments, lip care & other dermatologicals

Retail sales via stores, plus internet & mail order sales; growth rates are % change on previous 12 months. NB: **DB6** updates short-term forecasts every quarter; forecasts shown here updated in July 2026

- **laluset** range – based on hyaluronic acid – was extended with the lalusetPro sub-range in early 2026, comprising Derm (for surgery scars), Repair (for sunburn and burns), Family (for everyday cuts and scrapes) and Plus (for infected cuts and burns)
- Trolamine-based **Biafine** was buoyed by 2024 consumer print ads which described it as “effective relief from sunburn”, and claimed it soothes and cares for superficial burns
- Meanwhile, digital ads for the CicaBiafine cosmetic sub-range in 2026 focused on Baume Multi-Réparateur Apaisant, with ads stressing the balm’s suitability for baby’s sensitive skin, acne marks, scratches and post-tattoo recovery



Ads for CicaBiafine claim it “helps to repair damaged skin from the first application”

- In spring 2024 Pierre Fabre extended the **Epitheliale AH** range (part of the A-Derma skincare line) with Ultra Repair Baume-Patch Réparateur (Repairing Patch-Balm), which is designed for damaged and cracked skin and said to provide a patch-like effect to seal in hydration

France leading wound healers 2025 (MSP, \$mn)

	Brand	\$mn	25/24	CAGR 25/21
1	Bepanthen (Bayer)	43.9	-3%	+1%
2	Avène Cicalfate+ (Pierre Fabre)	14.7	+7%	+4%
3	laluset (IBSA)	11.0	+2%	-6%
4	Biafine (Kenvue)	10.6	+8%	+3%
5	Homéoplasmine (Boiron)	7.2	+1%	+3%
6	Cicaplast (La Roche Posay / L'Oréal)	3.7	+8%	+6%
7	Epitheliale AH (Pierre Fabre)	2.5	+6%	+2%
8	H.E.C (Chauvin / Bausch Health)	2.5	+88%	+4%
9	Oxyplastine (Alliance)	2.3	+9%	+17%
10	Effidia (Systagenix)	2.0	+7%	+8%
	Others	11.7	+0%	-16%



- Diversification outside of patches includes Targeted Solutions and Daily Care ranges as well as a range of cleansers rolled out in 2026; wider focus on skincare has also seen brand extended into sun protection via Superlight Sunscreen SPF30, a lightweight “gel-cream” format sunscreen for acne-prone skin
- Brand’s strong reputation in acne care is an effective foundation for diversification into skincare and personal care products for acne sufferers



- Another recent innovation is 2026 launch Mighty Shield, a “liquid pimple patch” with a precision applicator that can easily be used around the nose, mouth and brows to form a protective barrier over acne
- Launch of Mighty Shield was supported by promotion featuring range’s brand ambassador, professional gymnast Jordan Chiles; social media content also features frequent calls for new content creators to partner with the brand and build online presence

- Promotional activities include a highly successful TikTok account with over 10.3mn likes, including information about new product launches and skincare as well as viral “gunk shot” challenge where users can post videos of removing the patch to show how it draws out the “gunk” from the skin to reduce acne



- Social media is also used to build buzz prior to line extensions rather than simply promote new launches after the fact; in the build-up to the launch of the Cleanser range in 2026, TikTok posts included countdowns to the rollout in stores, and ongoing promotional strategy includes updates on expansion into new retail chains such as Ulta Beauty and Olive Young
- Most recent collaboration was a limited-edition packaging design from artist Isabela Eve to commemorate Latinx Heritage Month (see left)

