DIGESTIVE HEALTH

Gastrointestinals, Probiotics & the Expanding CHC Market for Digestive Health Solutions

Nicholas Hall's
CHC REPORTS

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Nicholas Hall's CHC REPORTS

Common abbreviations

A+P	advertising & promotion
BTC	behind-the-counter
j-v	joint-venture
L&A	licensing & acquisition
MSP	manufacturer's selling price
M&A	merger & acquisition
OTC	over-the-counter
POS	point-of-sale
Rx	prescription
SPD	separation of prescribing and dispensing
UTC	under-the-counter (illegal OTC sales of Rx-only products)

Definitions

An oblique mark (/) is used to show the ultimate owner of a company, e.g. "Chattem / Sanofi"; the term "for" is used to indicate that the former company markets a brand under license from the latter, e.g. "Taisho for Haleon".

The term "mass market" is used to mean sales through non-pharmacy retail outlets.

"Principal markets" or "key markets" for a given company are examples of some of the most important countries or regions where the company generates sales, rather than an exhaustive list of countries where it markets products.

CHC market definition

Market sizes, growth rates and brand sales are, unless stated otherwise, based on Nicholas Hall's global CHC database, ***DB6***.
All data is being updated continually and is believed to be accurate at the time of going to press.

All CHC market data contained in this report is expressed at manufacturer's selling prices (MSP), although it relates to consumer purchases.
Sales data includes all non-prescription sales. Data includes retail sales in all outlets. Mail order, multi-level, e-Commerce and other non-retail sales are not included unless specified.

CHC market definition (continued)

Full year sales data is for the calendar year January-December for each year shown.

All data is calculated in local currency and converted to US dollars at the exchange rate that applied on 31 December 2023. The symbol $ refers to United States dollars unless otherwise stated.

Under-the-counter (UTC) sales are not included except in countries where there are few or no legal OTCs (such as Turkey) where UTC sales are included for products that fall within the DB6 category definition and would be considered consumer items in most established markets.

Non-prescribed sales of semi-ethical brands (which can be sold both with and without a prescription) are included in all sales estimates. Prescription sales of OTC-registered brands are included where these sales are significant.

Manufacturers' sales data is based on branded products alone. Manufacturers' sales do not include any private label sales to retailers or bulk sales of unbranded products to other manufacturers or distributors. Sales of individual private labels are included in "others" in each subcategory.

Sales data for each manufacturer includes sales made by any national or international subsidiaries.

All acquisitions are added to manufacturers' historical data so growth excludes the effect of M&A activity.

Volume sales, where available, represent the absolute number of packs sold (unadjusted for size / dosage).

All forecasts take into account published socio-economic and demographic forecasts plus OTC-specific factors such as switch, regulatory change and historical trends.

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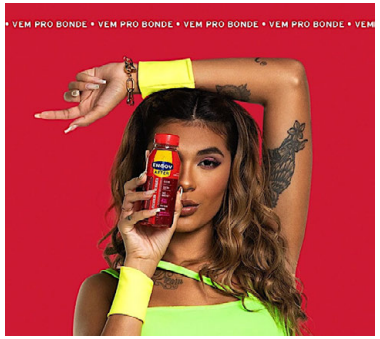
Brazil | Antacids

- Haleon also fields **Sal de Andrews** (sodium bicarbonate, magnesium sulphate; $0.8mn, +17%) in the lower tier, but brand has failed to gain market traction
- May 2021 saw category No.3 **Engov** (aluminium hydroxide, aspirin, caffeine, pyrilamine) launch an "unprecedented" digital action entitled "After Stories" that involved 150 influencers simultaneously sharing posts about enjoying life for four consecutive Fridays, reinforcing Engov After's (launched 2020) positioning as an "Enjoyment specialist"
- In November 2021, Hypera launched a multi-platform campaign for both core Engov and After entitled "Fun Train" (*see left*), featuring upbeat music TV ads from pop artists Pocah and Mateus Carrilho and encouraging consumers to reproduce the choreography on TikTok



- 2024 saw Hypera continue this long-running initiative, with activities coinciding with New Year celebrations and influencer partnerships
- Traditionally targeting partygoers, the antacid gains significant exposure as a sponsor of Big Brother Brasil reality show and via collective A+P alongside Engov Up (launched 2023) and Engov After energy drinks, positioned as hangover remedies that aid recovery and rehydration; the latter had a strong presence at festivals and concerts in 2023, and via interactive activity at Rio Open tennis tournament in February 2024

The Hangover War: Hypera vs. Cimed

- After Hypera found success extending Engov antacid with Engov After energy drink range, União Química and Cimed also launched energy drinks under their respective brand banners in 2023
- Hypera filed a complaint pertaining to Cimed's Ressaliv After, claiming infringement on Engov After's packaging which could confuse consumers and cause losses to Hypera; the complaint was upheld in January 2024

France | Probiotics

- Symbiosys line was extended further in 2021 via Lactoderma soluble sticks (L. salivarius LS01, vitamin B2) to support skin health for the whole family, while September 2023 saw the addition of Symbiosys Serenitas capsules (B. longum 1714, saffron, vitamin B6), which is positioned for stress, emotional balance and nervous system health
- Print ads for Symbiosys Serenitas in *Parents*, *Santé Magazine* and *Top Santé* stated "Well in my stomach, well in my head", while packaging states "probiotic"

- **Probiolog** has been rapidly expanded with condition-specific presentations in recent years, e.g. Perte de Poids (probiotics, konjac, cola; for weight loss), Ventre Plat (probiotics, carum carvi; for bloating) and Détox (probiotics, burdock, dandelion, nettle) in 2022

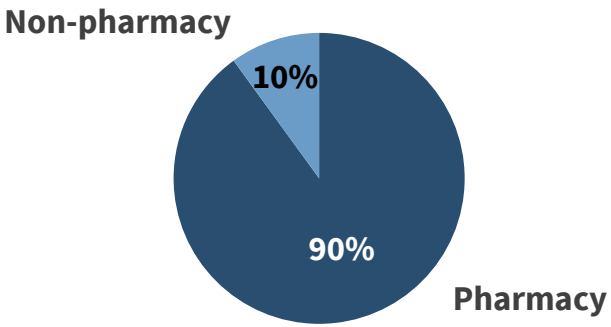
France leading probiotics marketers 2023 (*MSP, $mn*)

	Brand	$mn	23/22	CAGR 23/19
1	**PiLeJe**	**47.7**	+18%	+6%
2	**Biocodex**	**34.9**	+2%	+3%
3	**Nutergia**	**17.8**	+26%	+11%
4	**Mayoly Spindler**	**10.0**	+4%	-2%
5	**Havea**	**8.2**	+8%	+4%
6	**PediAct**	**5.6**	+3%	+2%
7	**Immubio**	**3.0**	+17%	+15%
8	**Pierre Fabre**	**2.9**	-2%	-2%
9	**Urgo**	**2.2**	+42%	+15%
10	**Servier**	**2.1**	+73%	n/a
	Others	**37.1**	+16%	+7%

- Énergie Boost and Complexe Énergie followed in January 2023; former is available as ampoules (vitamin C and B. lactis BL-04 in the cap, to be mixed with ginseng, vitamin B12 and zinc in the bottle; for vitality in adults), while latter is available as capsules (L. helveticus Rosell-52, B. longum Rosell-175, B vitamins and copper; designed for physical and emotional fatigue in adults)
- Further down the rankings, antidiarrhoeal Smecta's sister brand **Smebiocta** (Mayoly-Spindler; $1.9mn, +15%, CAGR -1%) competes; Smebiocta Protect (S. boulardii, L. rhamnosus GG; orodispersible sticks) was renamed Smebiocta ATB Protect in 2022
- Another GIs brand to extend into probiotics was Urgo's Belloc via **Belloc Probiotiques** (previously branded Belloc Microbiote; four probiotic strains, calcium, fibre, vitamins C & D3, zinc, selenium; $1.5mn) in 2021; positioned to enrich microflora, the brand was supported with TV ads in winter 2022-23

Japan | Overview

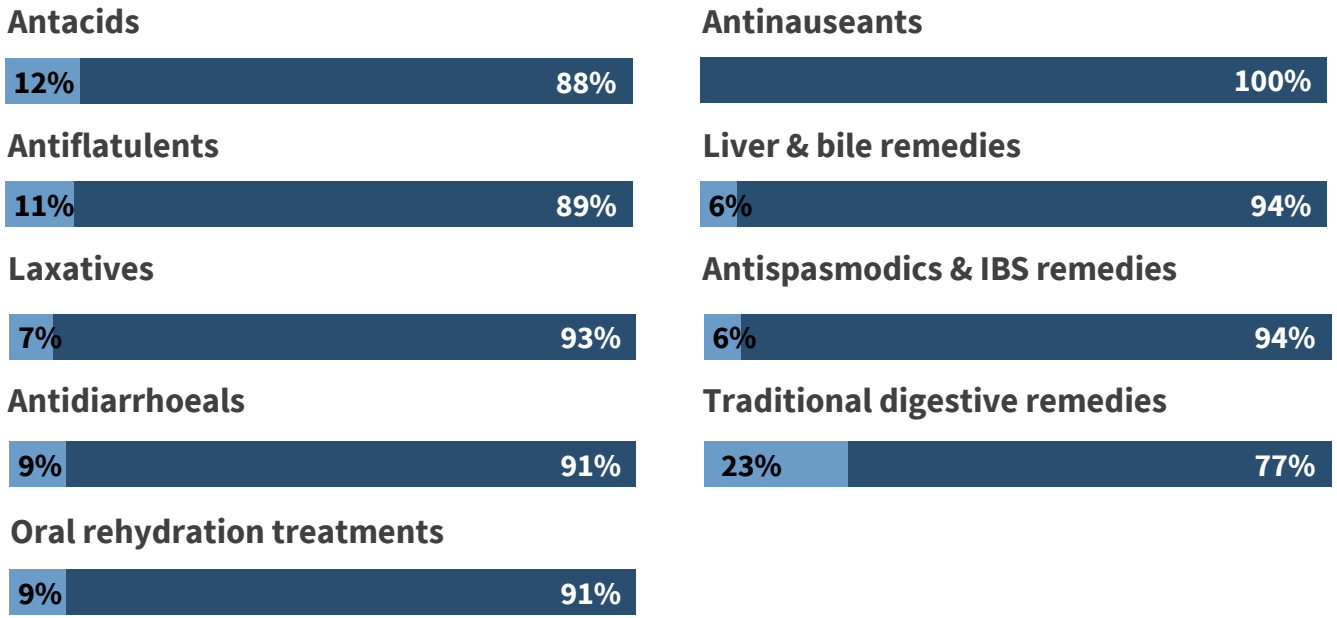
Japan GIs sales by pharmacy / non-pharmacy channel 2023 (*MSP, $mn*)



Distribution environment:
Despite availability of Class II and III OTCs in the mass market, pharmacy sales continue to dominate; consumers also often visit HCPs for minor ailments. Self-selection and online sale of OTCs is well established, while private labels remain a minor segment at present despite growing retailer interest.

Japan GIs sales via internet & mail order channel 2023 (*MSP, $mn*)

$36.1mn, +9.8%, CAGR +7.4%



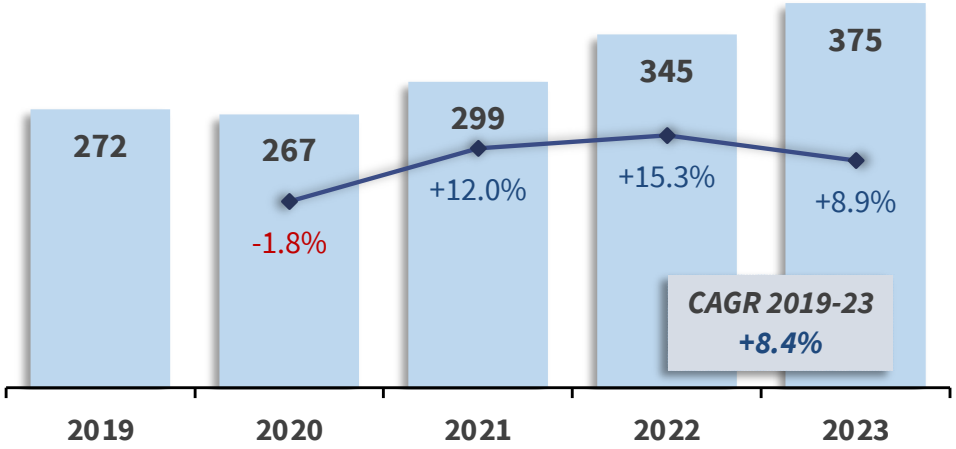
Legal status of selected gastrointestinal ingredients in Japan

Ingredient	Status	Ingredient	Status	Ingredient	Status
cimetidine	Rx	famotidine	P	mebeverine	U
dimenhydrinate	M	lactulose	Rx	omeprazole	Rx
diosmectite	M	lansoprazole	Rx	pantoprazole	U
domperidone	Rx	loperamide	M	racecadotril	U
esomeprazole	Rx	macrogol	U	ranitidine	U

Rx = prescription only P = OTC in pharmacy only M = available in mass market U = not available

Poland | Overview

Poland GIs sales 2019-23 *(MSP, $mn)*



Growth rates are % change on previous 12 months

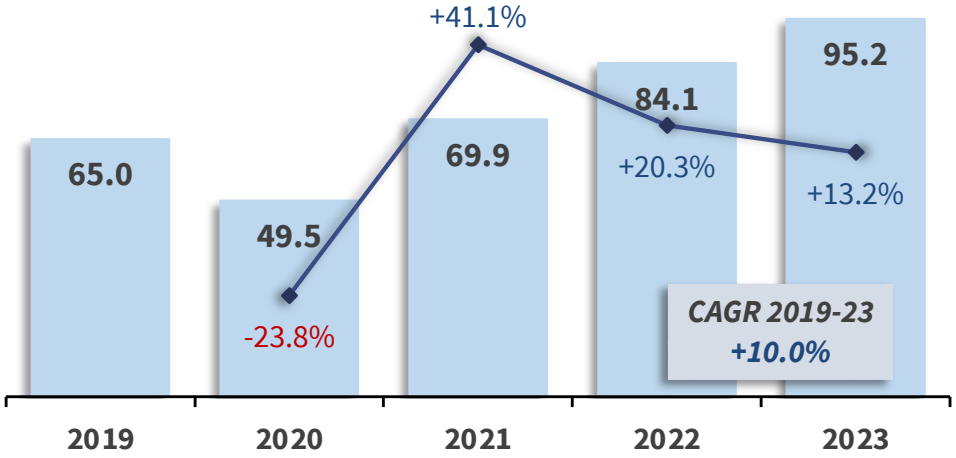
Poland GIs & Probiotics sales by category 2023 (*MSP, $mn*)			
Subcategory	**$mn**	**23/22**	**CAGR 23/19**
Antacids	**58.1**	+14%	+10%
Antiflatulents	**21.5**	+7%	+3%
Laxatives	**51.1**	+13%	+8%
Antidiarrhoeals	**36.7**	+6%	+9%
Oral rehydration treatments	**17.9**	+6%	+20%
Antinauseants	**8.9**	+11%	+10%
Digestive enzymes	**10.7**	+7%	+4%
Liver & bile remedies	**95.0**	+7%	+5%
Antispasmodics & IBS remedies	**49.7**	+12%	+12%
Other gastrointestinals	**25.5**	+0%	+10%
Total GIs	**375.1**	+9%	+8%
Probiotics	**119.9**	+7%	+7%

GIs & Probiotics trends in Poland

- Most categories registered **value growth**, although **largely inflationary** (volume sales declined in 2023)
- There was **significant NPD investment**, with key launches including market's first racecadotril-based antidiarrhoeal with paediatric positioning (6+ years), as well as country's first dimenhydrinate-formulated antinauseants in liquid format, and the first OTC esomeprazole option
- **High levels of consumer promotion** (notably TV advertising), as well as **digital promotion targeting HCPs**
- Although Poland has a consumer health mass market, the range of GIs on the GSL list is limited and **market is strongly pharmacy-oriented**

Brand Case Studies | Dramamine

Dramamine sales 2019-23 *(MSP, $mn)*

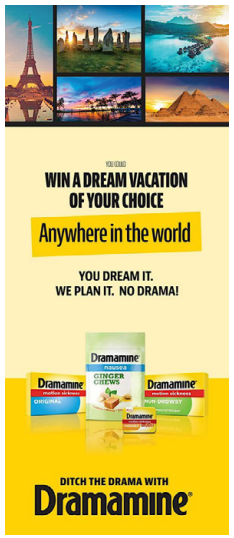


Growth rates are % change on previous 12 months

- Dramamine benefited from high-profile ad campaigns employing humour and a mascot in core market USA

Key facts

- Dramamine is the leading antinauseant brand and No.1 pharmacist-recommended brand for fighting motion sickness in USA (where marketed by Prestige CH); dynamic sales have seen brand soar above pre-pandemic levels
- Attention-grabbing A+P campaigns introduced a mascot (Drama Llama), offered dream vacations and paid tribute to the barf bag, which the brand claims to have made obsolete
- Brand also dominates Mexico's antinauseants category (marketed by Kenvue), where it receives limited A+P support; smaller presence in Colombia (Kenvue), Thailand (Taisho) and Turkey (Ali Raif)



- Recognising that stresses associated with planning vacations hold people back from travelling, Dramamine's 2023 Ditch the Drama sweepstakes gave three prize winners the chance to experience their dream vacation anywhere in the world, without the drama (*see left*)
- Brand teamed up with Travelocity travel experts to assist in co-ordinating everything from airfare to accommodation and activities, and enlisted motion sickness sufferer, mega-yacht captain and TV star Captain Lee Rosbach
- Uploading a receipt from a Dramamine purchase allowed extra chances to win at www.DramamineDitchtheDrama.com

- A national campaign launched in summer 2023 featured new spokes-character, Drama Llama (*see above*): "Feeling nauseous? He's there, reminding you of the drama of nausea. His kryptonite? Dramamine"