

HEART HEALTH

Exploring the OTC options



KEY FEATURES

180-page report featuring in-depth exploration of OTC Heart Health

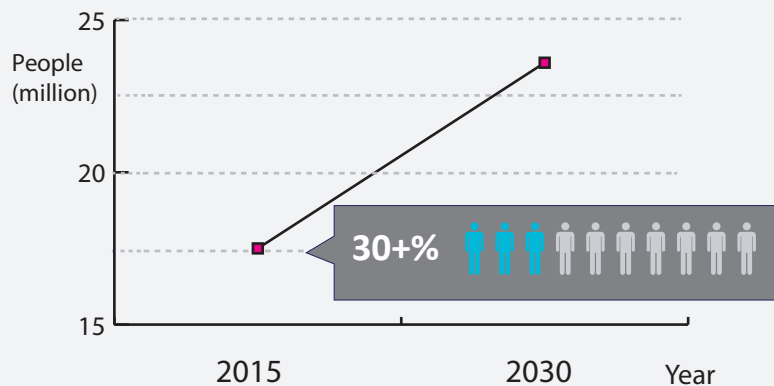
Covers Systemic cardiovasculars, Fish oils & omega-3 supplements, CoQ10, Garlic and Other supplements for heart health

Major markets profiled region by region, with full-year 2016 OTC sales from **DB6**

Brand Case Studies highlight success factors, sales and A+P activity

Dedicated chapters cover Scientific studies and The Gender Divide in Heart Health

More people die annually from cardiovascular diseases than from any other cause; it is the leading cause of death for both men and women. According to the WHO, **an estimated 17.5mn people die from CVDs annually, representing over 30% of all global deaths, expected to rise to 23.6mn by 2030.** Out of 16mn deaths under the age of 70 due to non-communicable diseases, 37% are currently caused by CVDs.

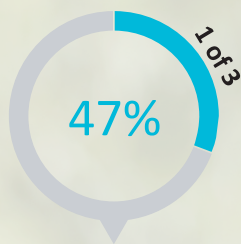


Heart disease is one of the most preventable causes of death. Better lifestyle choices such as **more exercise, healthier diet** and **quitting smoking** can make a big difference.

At the same time, medicines and supplements are forming an increasingly important part of people's heart health routines. And the frightening statistics on heart disease point to the vital importance of a self-medication market for heart health, the need for accessible OTC options and raised consumer awareness of their benefits.



Every 33 seconds someone in the US has a heart attack



HEART DISEASE

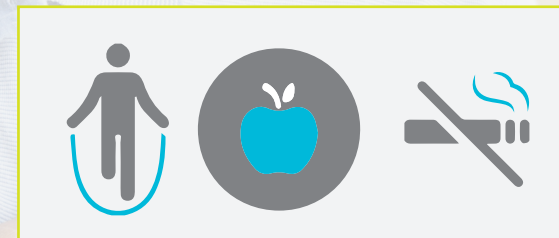
47% of Americans have at least one of three risk factors for heart disease (high blood pressure, high cholesterol, smoking)



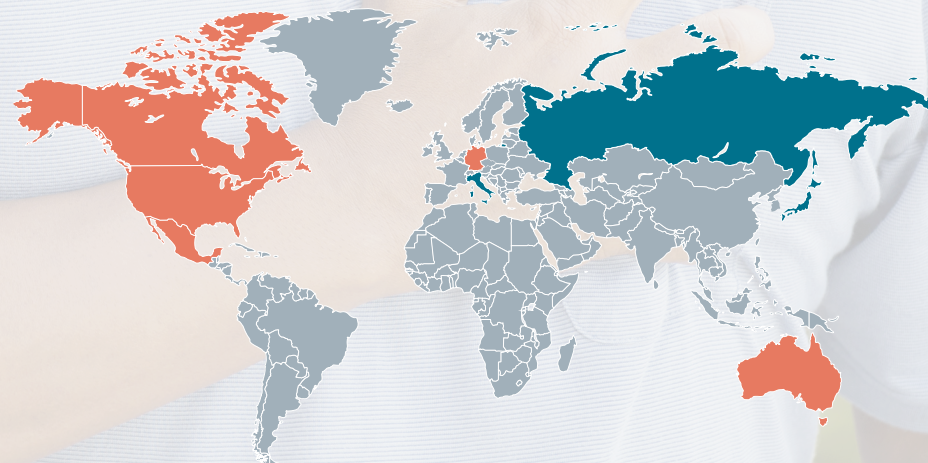
Under the age of 50, women's heart attacks are twice as likely as men's to be fatal



80% of deaths from cardiovascular disease are attributable to preventable factors



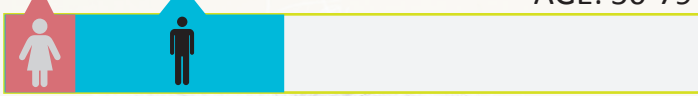
However, sales of systemic cardiovasculars – the largest OTC category for heart health – have underperformed for several years in major markets like Australia, Canada, Germany and the US, often held back by competition from prescription options like beta-blockers, ACE inhibitors and statins, plus a lack of consumer awareness. Bright spots do exist, such as rising OTC sales in Italy, Japan and Russia, but there it is still much untapped potential. Meanwhile, the fortunes of fish oils & omega-3, co-enzyme Q10, garlic and other heart-related supplements vary significantly from market to market.



10%

40%

AGE: 50-79



The benefits of getting more consumers to take better care of their heart are very real, with intervention potentially extending the life expectancy of at-risk groups and saving lives.

The lives of older Americans at high risk of CVD could be extended with a daily aspirin regimen, suggested a PLOS One study (Dec 2016). Over 40% of men and 10% of women aged 50-79 are at high CV risk but do not take aspirin, representing a “large unmet need for daily aspirin”.

Researchers estimated that if these people increased aspirin use, national life expectancy at 50 would be improved by 0.28 years, and an additional 900,000 people would still be alive by 2036.

FEB

Heart Health

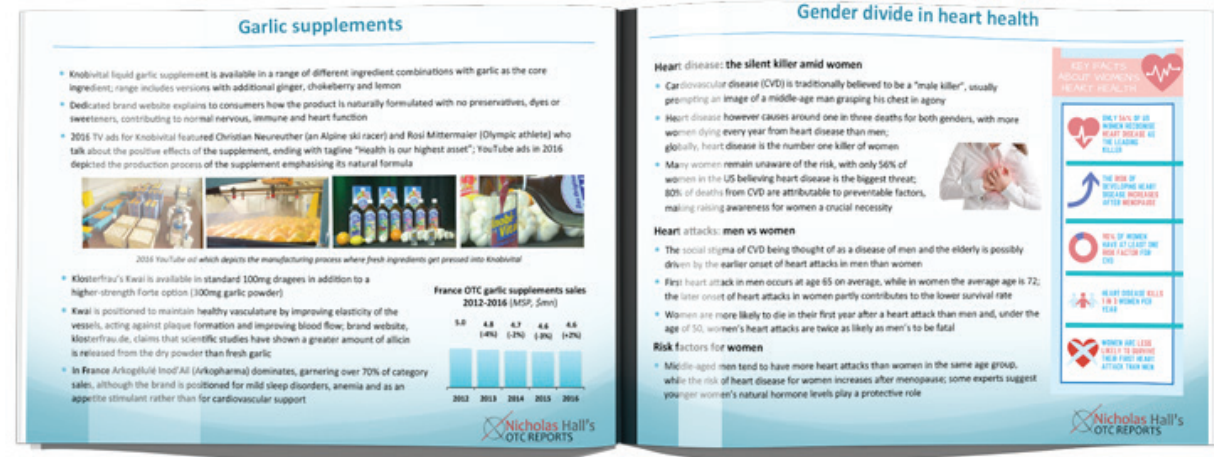
February was Heart Health Month in the US and UK, seeing initiatives to raise awareness such as a national Wear Red Day and plenty of activity from heart foundations and OTC marketers. A+P efforts included Bayer’s 2017 “HeroSmiths”

campaign, which highlighted that many heart attack deaths could be prevented if everyone called Smith, the most popular surname in the US, carried aspirin. The aim of the campaign is to raise awareness that aspirin can increase the chances of surviving a heart attack and encourage people to carry aspirin and save lives.

Nicholas Hall’s latest report, *Heart Health: Exploring the OTC Options*, dives into this essential area to provide insight and analysis.

KEY FEATURES OF THE REPORT

- **AN IN-DEPTH EXPLORATION OF OTC HEART HEALTH OPTIONS**, including systemic cardiovasculars, fish oils & omega-3 supplements, CoQ10, garlic and other supplements
- **GAUGING THE SIZE OF THE MARKET IN INDIVIDUAL COUNTRIES**, plus brand performances, new developments, launches and A+P campaigns
- **COVERAGE OF ALL MAJOR MARKETS** (and some smaller ones), including Canada, China, France, Germany, Italy, Japan, Poland, Russia, S Korea, UK, USA, and more, on a region by region basis
- **FULL YEAR 2016 OTC SALES** direct from the freshly-published **DB6**, our dedicated OTC sales database
- **CASE STUDIES OF KEY HEART HEALTH BRANDS** highlight success factors, sales and A+P activity, including Bayer Aspirin, Kwai, HeartShape, MegaRed, PureHeart, Qunol and others
- **INVESTIGATING THE GENDER DIVIDE**: how most heart health products tend to target men, largely missing the important underdeveloped segment for women’s heart health
- **FORECAST SALES** for all heart health categories, and a look forward to potential opportunities, including a dedicated chapter on Scientific studies, looking at established and new ingredients



WHAT THIS REPORT COVERS

DB6 categories covered include:
Systemic cardiovasculars • Fish oils & omega-3
CoQ10 supplements • Garlic supplements

Plus selected heart health-focused brands from:
Multivitamins • Single vitamins
Minerals • Probiotics
Herbal & natural supplements

CHAPTERS

Executive summary

An introduction to heart health looking at statistics from around the world, assessing available OTC options and their performance from region to region, plus a focus on statins, technology and a look to the future

Systemic cardiovasculars

Region by region coverage with topline sales and brand performances across key markets, plus developments, trends, A+P campaigns and new launches, with forecasts by region and country. Plus a focus on phytosterols

Fish oils & omega-3

Region by region coverage with topline sales and brand performances across key markets, plus developments, trends, A+P campaigns and new launches, with forecasts by region and country

CoQ10 supplements

Region by region coverage with topline sales and brand performances across key markets, plus developments, trends, A+P campaigns and new launches, with forecasts by region and country

Other supplements for heart health

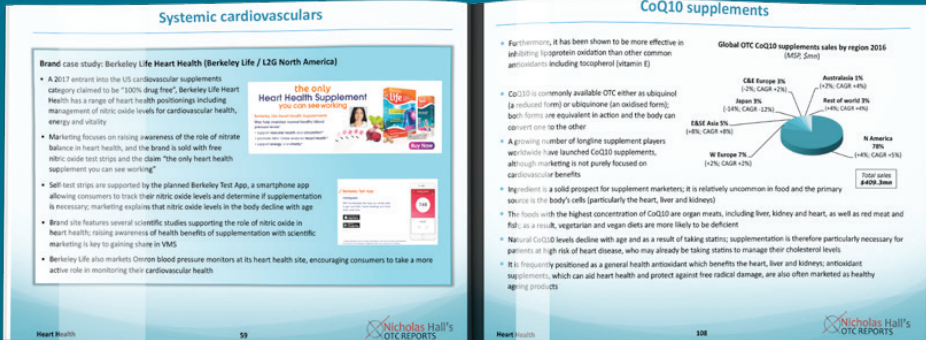
Investigating heart health-focused VMS options among multivitamins, single vitamins, minerals, probiotics and herbal & natural supplements

Scientific studies

Round-up of studies on heart health, with a focus on promising new ingredients

The gender divide in heart health

Looking at the differences between men and women regarding heart health, and investigating whether OTC brands are missing the vital female demographic



Garlic supplements

Region by region coverage with topline sales and brand performances across key markets, plus developments, trends, A+P campaigns and new launches, with forecasts by region and country

For the full Table of Contents for this report, please visit the Nicholas Hall website: www.nicholashall.com/nicholas-hall-reports/reports/item/HeartHealth/



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Latest Nicholas Hall Reports:



OTC Cold & Flu

This report includes Systemic cold & flu, Topical decongestants and Chest rubs & inhalants, plus VMS brands positioned for immunity, and includes coverage of 20 major markets from across the globe, with topline sales, brand performances, new developments, launches and A+P campaigns.

Publish date: July 2017



Nicholas Hall's OTC YearBook 2017

Nicholas Hall's bestselling unique reference book contains comprehensive market data through December 2016 drawn from our **DB6** Global OTC database.

Publish date: April 2017



OTC Dermatologicals

This report will look at the factors driving performances in all the major derma markets, investigating trends on a global and local level. It contains multi-country coverage and detailed reporting of individual categories and brands.

Publish date: November 2016



Eye Health

Incorporating year-end 2015 OTC sales from our Global OTC Database DB6, the report features the latest trends & developments, in-depth brand case studies, and vital insight into factors affecting individual markets.

Publish date: September 2016



Vitamins, Minerals & Supplements

This report contains multi-country coverage and detailed reporting of individual categories and brands. It also features in-depth brand case studies, and vital insight into factors affecting individual markets.

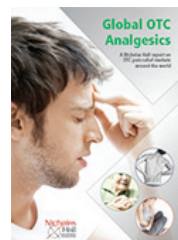
Publish date: July 2016



M&A

In a fragmented OTC market, expansion often means acquisition, but scouting for suitable acquisitions can take a long time. To help shorten that process, our M&A report includes a dedicated chapter identifying 100 companies that present an enticing OTC opportunity.

Publish date: March 2016



Global OTC Analgesics

This report breaks down this integral category to give consumer healthcare executives detailed insight into the uncertainties that are facing brands in today's market, as well as the growth drivers and new opportunities.

Publish date: November 2015



Nicholas Hall's Global OTC Markets

This report looks at the 12 largest OTC markets. While these markets lead the global industry, their performances differ wildly, showing the diverse nature of the consumer healthcare industry.

Publish date: September 2015

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