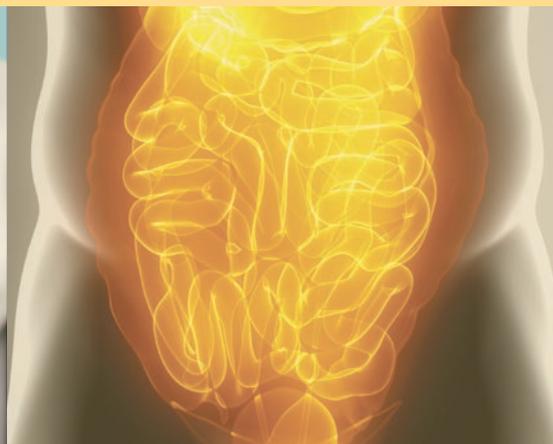
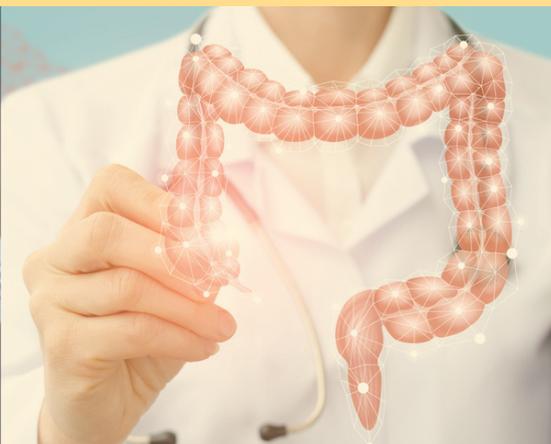


# Lower GIs

Trends & Opportunities in Laxatives, Antidiarrhoeals, Probiotics, Antispasmodics & IBS remedies

The latest trends in the Lower Gastrointestinals market analysed in a clear and concise way



# Lower GIs

## Trends & Opportunities in Laxatives, Antidiarrhoeals, Probiotics, Antispasmodics & IBS remedies

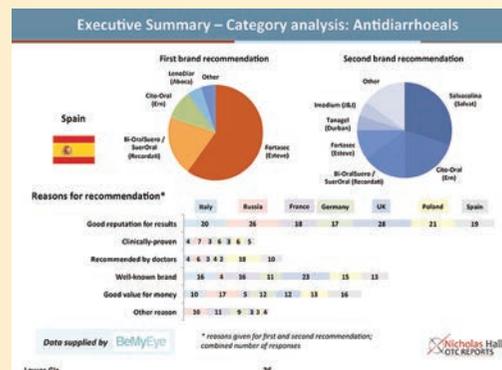
- The dynamic Lower GIs category – **laxatives, antidiarrhoeals, antispasmodics & IBS remedies** (plus GI-oriented probiotics) – is currently outperforming the consumer health market overall.



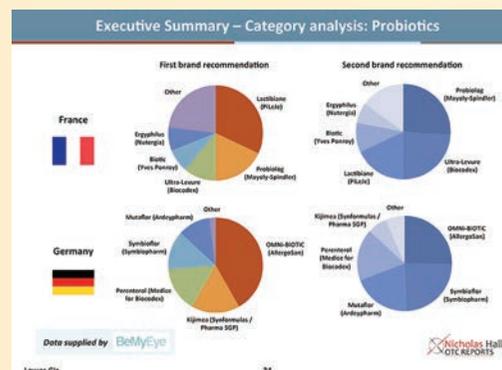
- Our new report delves into this **important growth category**, picking out the underlying trends that can make or break a brand in the fiercely competitive landscape. Individual country profiles covering the biggest global markets for Lower GIs assess the **performance of key brands and companies via comprehensive analysis** and a range of charts showing sales and growth.

BeMyEye

- Data analysis within each country profile includes a **breakdown of laxatives and antidiarrhoeals sales by segment**, while charts in the diverse GI-oriented probiotics category show the key positionings of leading brands. Dynamic areas going forward are assessed, with insights into key opportunities.
- Dedicated case studies of exciting brands** cover the innovations, line extensions, new formats and consumer promotional activity that have made them a success.



As an added benefit this report features exclusive research from **BeMyEye** examining key **pharmacist brand recommendations** (including primary and secondary recommendations across categories, plus reasons for recommending) in **key European markets**.



BeMyEye is a leading crowdsourced perfect store data as a service (DAAS) provider. Operating in 20 countries, it tracks Perfect Store execution metrics, including brand recommendations, by deploying over 1.5mn on-demand data gatherers using the BeMyEye App, and leveraging cutting-edge technologies to analyse the data.

## Key features of the report

- An in-depth exploration of the **Lower GIs** market, including Laxatives, Antidiarrhoeals, Antispasmodic & IBS remedies and Probiotics
- Landscaping 10 major markets from across the globe, with topline sales, brand performances, regulatory developments, launches and ad campaigns
- Shorter summaries of main activity and trends in **additional markets**, including Australia, Canada, UK, Poland and Spain
- Mid-2018 sales from newly-updated **DB6**, our dedicated OTC sales database
- **Pharmacist brand recommendations** in key European markets, courtesy of BeMyEye
- **Case studies** of key brands like Biostime and Metamucil, highlighting success factors, sales, NPD and A+P activity, plus a section casting a spotlight on innovations
- **Forecast sales** for all categories and countries, plus a look at what the future holds



## 10 individual markets profiled



**PLUS**  
In-brief coverage of Australia, Canada, UK, Poland and Spain

### India – Laxatives

- A pan-India OTC rollout of Softovac commenced in January 2018, while further promotion came in mid-2018 when Softovac co-branded with new movie Fanny Khan (featuring brand ambassador, Bollywood star Anil Kapoor)
- Launch activity saw arrival of **Petsalfa** tablets (see right) and granules (Dr. Juneja's Divisa Herbal Care Products) in January 2017
- Brand positioned for chronic and occasional constipation, additionally claiming to alleviate gastric reflux, headache, acidity and mouth ulcers
- Promotion ramped up in 2017 with particular focus in north and west of India; TV a Srivastav explaining that constipation should not be ignored as it can be root cause
- February 2017 saw Sami Direct launch **SoEasy**, naturally-formulated product combi FenuFibers (water soluble fibre made from husk of methi seeds) to support comfort
- In August 2018 Mankind launched **Kabzend**, positioned as natural ayurvedic laxative herbal ingredients (including senna and ispaghula)
- Numerous TV ads (see right) showed people waiting for man to come out of bath to talk to him about his constipation without directly mentioning it (with one man "everyone gets to know when you suffer from constipation")

### India laxatives sales by segment 2017 (MSP, \$mn)

\*Includes ayurvedic remedies and Ay reflects identified brands, see

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### Trends & developments in antidiarrhoeals

- Category limited to ORTs, although these face competition from probiotics with antidiarrhoeal positioning (see Probiotics)
- Consumer promotional support low, with most A+P aimed at HCPs (including positioning for mosquito-borne diseases)
- **Pedialyte Zinco** leads, partly thanks to formulation with zinc gluconate, which company draws attention to via claim that it is "the only hydroelectrolytic solution with zinc that accelerates rehydration"
- Its bestselling presentation is Pedialyte Zinco 45, positioned to prevent dehydration in cases such as fever, sun exposure, virus and dengue, while it is also available as Pedialyte Zinco 60, which is claimed to shorten diarrhoea duration (thus focusing on treatment)
- Brand receives no notable consumer promotion, relying on strong heritage instead
- No.2 brand **Hidraplex** indicated for preventing dehydration in cases of acute vomiting and diarrhoea; its soluble powder format differentiates it from Pedialyte
- Stablemate **Hidralyte** liquid meanwhile was backed by campaign on radio, print media, internet and at POS in 2016

### Brazil – Antidiarrhoeals

Brazil antidiarrhoeals sales mid-2017 and mid-2018 (MSP, \$mn)

Pedialyte Zinco 45 is positioned for prevention, while 60 is for treatment

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# LOWER GIs

**Spain – In brief**

Spain leading probiotics mid-2018 (MSP, \$mn)				
Brand	\$mn	mid-18 / mid-17	CAGR 17/13	Positioning
1 <b>Ultra-Levura</b> (Zambon for Biocodex)	9.2	+7%	+14%	digestive health, diarrhoea, AAD
2 <b>Prodefen</b> (Bullfarmaco)	8.2	+23%	+42%	digestive health, diarrhoea, atopic dermatitis
3 <b>Lactoflora</b> (Celaia)	4.4	+20%	+33%	digestive health, colic, vaginal health, immunity
4 <b>Reuteri</b> (Recordati for Biocodex)	4.0	+4%	+96%	colic
5 <b>Bivos</b> (Ferring)	3.8	+7%	+41%	digestive health, diarrhoea, AAD
6 <b>Casebiotic</b> (Recordati for Biocodex)	3.5			
Others	20.6			

**USA – Laxatives**

- Probiotics led by **Ultra Levura**; brand is available as sou (50mg or 250mg) and is positioned for symptomatic treat with antibiotic consumption
- Multi-media campaign for Ultra Levura 2018 spanned pri symbolic delicate balance of intestinal flora, and how d
- Prodefen** (probiotics + prebiotics) follows close behind,
- Lactoflora Protector intestinal** – available in adult and p while Stada added Lactoflora Colicare drops (Bifidobacte July 2018, positioned for colic and claimed to restore int
- Reuteri**, positioned specifically for infant colic, saw str paediatric drops line extension to stabilmate **Casebiot**

- Glycerin suppositories supported with TV ads in 2018-19 (see right), highlighting awkward places where oral laxatives can take effect, such as in the car or in the swimming pool, and claiming Fleet provides "relief in minutes, not hours"
- Claimed to be No.1 recommended brand by paediatricians, Pedia-Lax is offered in several options, including enema, suppository, tablet and liquid formats
- Benefiber** supported with humorous advertising highlighting Healthy Shape line extension, claimed to help people concerned about their shape feel fuller longer and curb cravings
- Previous ad claim – "Helps maintain regularity" – discontinued following challenge from P&G, which argued wheat dextrin (fibre in Benefiber) had not been clinically proven to promote regularity and, given product's mechanism of action, would not be expected to do so
- Phillips' Milk of Magnesia** declined despite recent attempts to expand the brand with laxatives offering added lifestyle benefits such as energy support and metabolism support
- Latest offering is Phillips' Fiber Good plus Metabolism Support (with added B vitamins and chromium), launched 2016
- Purdue Frederick / Mundipharma supported its two mature laxative brands – **Colace** and **Senokot** – with TV ad campaigns



- Growth drivers, success factors and competitive landscape
  - In-depth category analysis across multiple markets
- Forecast sales for all categories, plus a look to what the future holds

Please contact [melissa.lee@NicholasHall.com](mailto:melissa.lee@NicholasHall.com) for more information about this report or visit our website ([nicholashall.com/report/lowerGIs](http://nicholashall.com/report/lowerGIs)) where you can view or download the full Table of Contents and sample pages

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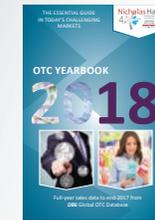
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An exploration of the Upper Gastrointestinals market, including antacids, antiflatulents, antinauseants, digestive enzymes and liver & bile remedies, with coverage of 15 major markets.

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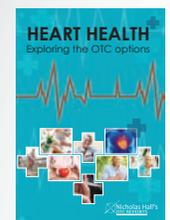
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Our report on Heart Health takes an in-depth look into this category, giving insight into the latest trends. It explores self-care options including systemic cardiovasculars, fish oils & omega-3 supplements, CoQ10, garlic and other supplements.

June 2017

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