

# USA – Laxatives

- 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

# 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 Fanney Khan (featuring brand ambassador, Bollywood star Anil Kapoor)

- Launch activity saw arrival of **Petsaffa** 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

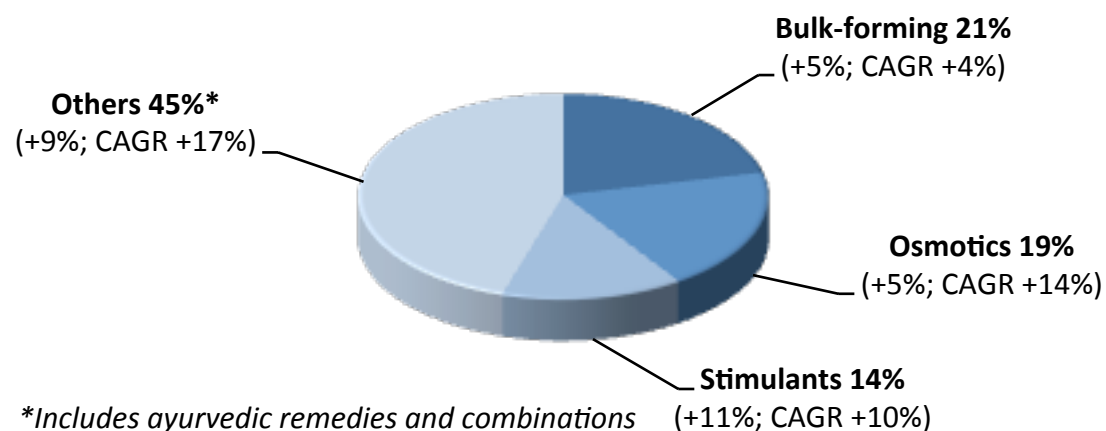
- Promotion ramped up in 2017 with particular focus in north and west of India; TV ads starred popular comedian Raju Srivastav explaining that constipation should not be ignored as it can be root cause of other problems

- February 2017 saw Sami Direct launch **SoEazy**, naturally-formulated product combining psyllium husk and patented FenuFibers (water soluble fibre made from husk of methi seeds) to support comfortable bowel elimination

- In August 2018 Mankind launched **Kabzend**, positioned as natural ayurvedic laxative containing 17 herbal ingredients (including senna and ispaghula)

- Humorous TV ads (*see right*) showed people waiting for man to come out of bathroom, and trying to talk to him about his constipation without directly mentioning it (with one man whispering “everyone gets to know when you suffer from constipation”)

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



\*Includes ayurvedic remedies and combinations  
Pie reflects identified brands, worth \$101.5mn

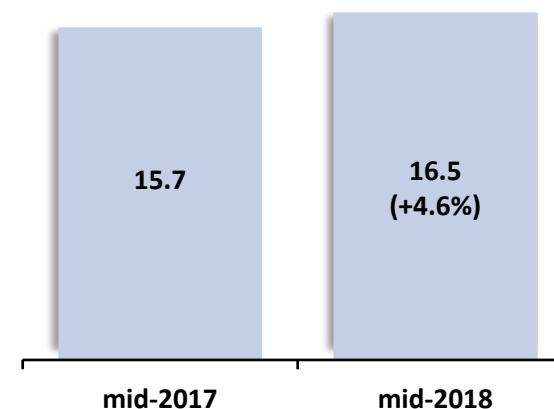


# Brazil – Antidiarrhoeals

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



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

## 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	+3%	+14%	digestive health, diarrhoea, AAD
2	<b>Prodefen</b> (Italfarmaco)	8.2	+22%	+42%	digestive health, diarrhoea, atopic dermatitis
3	<b>Lactoflora</b> (Stada)	4.4	+10%	+31%	digestive health, colic, vaginal health, immunity
4	<b>Reuteri</b> (Recordati for BioGaia)	4.0	+4%	+96%	colic
5	<b>Bivos</b> (Ferring)	3.8	+7%	+41%	digestive health, diarrhoea, AAD
6	<b>Casenbiotic</b> (Recordati for BioGaia)	3.5	+3%	+9%	digestive health
	Others	20.6	+10%	+18%	

- **Probiotics** led by **Ultra Levura**; brand is available as soluble powder (saccharomyces boulardii 250mg) and hard capsules (50mg or 250mg) and is positioned for symptomatic treatment of acute diarrhoea and prevention of diarrhoea associated with antibiotic consumption
- Multimedia campaign for Ultra Levura 2018 spanned print, online and TV, with ads showing family playing Jenga to symbolise delicate balance of intestinal flora, and how diet, illness and travel can upset it
- **Prodefen** (probiotics + prebiotics) follows close behind, positioned for diarrhoea, constipation and atopic dermatitis
- **Lactoflora** Protector Intestinal – available in adult and paediatric versions – was among best performers in Lactoflora range, while Stada added Lactoflora Colicare drops (bifidobacterium longum CECT 7894, pediococcus pentosaceus CECT 8330) in July 2018, positioned for colic and claimed to restore intestinal balance
- **Reuteri**, positioned specifically for infant colic, saw strong growth 2013-16, although sales may have been cannibalised by paediatric drops line extension to stablemate **Casenbiotic** in 2016