Mid-2022 CHC Review

Nicholas Hall's Mid-Year Consumer Healthcare Update

Key Features of this Report:

- Latest global, regional and market-level trends in CHC
- The newest sales data, freshly published by ***DB6***
- Fresh analysis of category trends, brand activity and regulatory updates
- Up-to-date short-term forecasts

Nicholas Hall's
CHC REPORTS

Explore the very latest CHC sales, growth drivers and forecasts in a concise topical report. In 90 detail-packed pages, this report probes the most important CHC market influences globally, across categories and individual markets, while casting an eye to the future.

The report features the latest **MAT Q2 2022 sales** data from our dedicated ***DB6*** database, including topline historical sales globally, by region, country and category, as well as short-term forecasts to 2022-23 and long-term forecasts to 2026 & 2031.

Featuring sales for the 12-month period ending June 2022, plus y-o-y growth rates, the report includes over 60 unique sales charts. Historical growth rates 2018-21 are included to help chronicle performance fluctuations over time, while a 21/19 two-year comparator shows how categories, marketers and brands are faring vs the pre-Covid era.

Four concise chapters cover all the key insights you need

Global Overview delves into the CHC market's performance and tracks the latest happenings in Switch, Innovation, M&A and beyond.

Charts include:

Global CHC sales mid-2021 & mid-2022[1]

Global CHC sales by region mid-2022[2]

Global CHC sales by major category mid-2022[2]

Global Top 10 CHC players mid-2022[2]

Covering all six major categories in turn, **Category Trends** charts the factors impacting Analgesics, CCA, GIs, VMS, Derma and Lifestyle CHC, casting the spotlight on individual subcategories.

Charts include:

Global [major category] sales mid-2021 & mid-2022[1]

Global [major category] sales by subcategory mid-2022[2]

Global leading [major category] brands mid-2022[2]

Core Markets assesses the most recent developments in each of the Top 12 markets (including USA, China, Germany, Brazil, Italy, India and more), appraising performances and trends category by category.

Charts include:

Global leading CHC markets mid-2022[2]

[Market] CHC sales mid-2021 & mid-2022[1]

[Market] CHC sales by major category mid-2022[2]

[Market] leading marketers & brands mid-2022[2]

Evaluating the future of CHC, the **Outlook** chapter considers the prospects & challenges facing CHC players, alongside short- and long-term forecast sales.

Charts include:

Global short-term forecast sales by major category / by region 2022-23

Global 5 & 10 year forecast sales by major category / by region 2026 & 2031

[1] *including historical growth rates 2018-21* [2] *including CAGR 21/17 and 21/19 two-year comparator*

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Mid-2022 CHC Review

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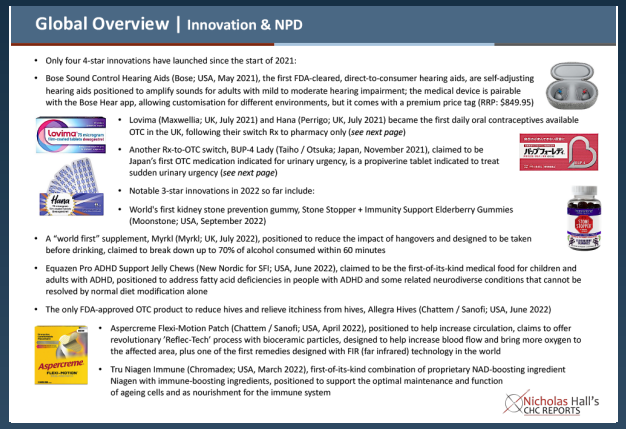

Global Overview | Innovation & NPD

- Only four 4-star innovations have launched since the start of 2021:
- Bose Sound Control Hearing Aids (Bose; USA, May 2021), the first FDA-cleared, direct-to-consumer hearing aids, are self-adjusting hearing aids positioned to amplify sounds for adults with mild to moderate hearing impairment; the medical device is pairable with the Bose Hear app, allowing customisation for different environments, but it comes with a premium price tag (RRP: $849.95)
- Lovima (Maxwellia; UK, July 2021) and Hana (Perrigo; UK, July 2021) became the first daily oral contraceptives available OTC in the UK, following their switch Rx to pharmacy only (*see next page*)
- Another Rx-to-OTC switch, BUP-4 Lady (Taiho / Otsuka; Japan, November 2021), claimed to be Japan's first OTC medication indicated for urinary urgency, is a propiverine tablet indicated to treat sudden urinary urgency (*see next page*)
- Notable 3-star innovations in 2022 so far include:
- World's first kidney stone prevention gummy, Stone Stopper + Immunity Support Elderberry Gummies (Moonstone; USA, September 2022)
- A "world first" supplement, Myrkl (Myrkl; UK, July 2022), positioned to reduce the impact of hangovers and designed to be taken before drinking, claimed to break down up to 70% of alcohol consumed within 60 minutes
- Equazen Pro ADHD Support Jelly Chews (New Nordic for SFI; USA, June 2022), claimed to be the first-of-its-kind medical food for children and adults with ADHD, positioned to address fatty acid deficiencies in people with ADHD and some related neurodiverse conditions that cannot be resolved by normal diet modification alone
- The only FDA-approved OTC product to reduce hives and relieve itchiness from hives, Allegra Hives (Chattem / Sanofi; USA, June 2022)
- Aspercreme Flexi-Motion Patch (Chattem / Sanofi; USA, April 2022), positioned to help increase circulation, claims to offer revolutionary 'Reflec-Tech' process with bioceramic particles, designed to help increase blood flow and bring more oxygen to the affected area, plus one of the first remedies designed with FIR (far infrared) technology in the world
- Tru Niagen Immune (Chromadex; USA, March 2022), first-of-its-kind combination of proprietary NAD-boosting ingredient Niagen with immune-boosting ingredients, positioned to support the optimal maintenance and function of ageing cells and as nourishment for the immune system

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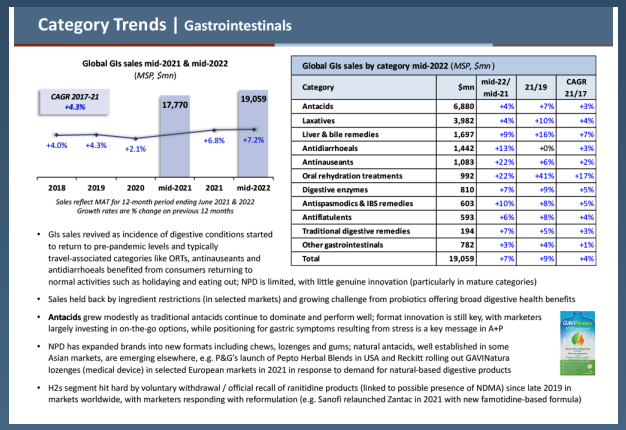


Category Trends | Gastrointestinals

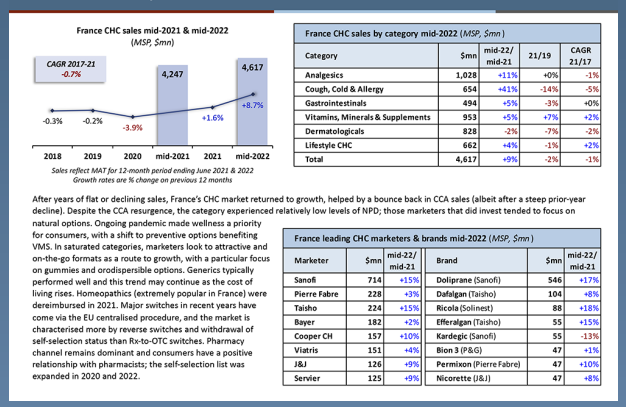
Global GIs sales mid-2021 & mid-2022 (*MSP, $mn*)

Sales reflect MAT for 12-month period ending June 2021 & 2022
Growth rates are % change on previous 12 months

Global GIs sales by category mid-2022 (*MSP, $mn*)

Category	$mn	mid-22/ mid-21	21/19	CAGR 21/17
Antacids	6,880	+4%	+7%	+3%
Laxatives	3,982	+4%	+10%	+4%
Liver & bile remedies	1,697	+9%	+16%	+7%
Antidiarrhoeals	1,442	+13%	+0%	+3%
Antinauseants	1,083	+22%	+6%	+2%
Oral rehydration treatments	992	+22%	+41%	+17%
Digestive enzymes	810	+7%	+9%	+5%
Antispasmodics & IBS remedies	603	+10%	+8%	+5%
Antiflatulents	593	+6%	+8%	+4%
Traditional digestive remedies	194	+7%	+5%	+3%
Other gastrointestinals	782	+3%	+4%	+1%
Total	19,059	+7%	+9%	+4%

- GIs sales revived as incidence of digestive conditions started to return to pre-pandemic levels and typically travel-associated categories like ORTs, antinauseants and antidiarrhoeals benefited from consumers returning to normal activities such as holidaying and eating out; NPD is limited, with little genuine innovation (particularly in mature categories)
- Sales held back by ingredient restrictions (in selected markets) and growing challenge from probiotics offering broad digestive health benefits
- **Antacids** grew modestly as traditional antacids continue to dominate and perform well; format innovation is still key, with marketers largely investing in on-the-go options, while positioning for gastric symptoms resulting from stress is a key message in A+P
- NPD has expanded brands into new formats including chews, lozenges and gums; natural antacids, well established in some Asian markets, are emerging elsewhere, e.g. P&G's launch of Pepto Herbal Blends in USA and Reckitt rolling out GAVINatura lozenges (medical device) in selected European markets in 2021 in response to demand for natural-based digestive products
- H2s segment hit hard by voluntary withdrawal / official recall of ranitidine products (linked to possible presence of NDMA) since late 2019 in markets worldwide, with marketers responding with reformulation (e.g. Sanofi relaunched Zantac in 2021 with new famotidine-based formula)



Core Markets | France

France CHC sales mid-2021 & mid-2022 (*MSP, $mn*)

Sales reflect MAT for 12-month period ending June 2021 & 2022
Growth rates are % change on previous 12 months

France CHC sales by category mid-2022 (*MSP, $mn*)

Category	$mn	mid-22/ mid-21	21/19	CAGR 21/17
Analgesics	1,028	+11%	+0%	-1%
Cough, Cold & Allergy	654	+41%	-14%	-5%
Gastrointestinals	494	+5%	-3%	+0%
Vitamins, Minerals & Supplements	953	+5%	+7%	+2%
Dermatologicals	828	-2%	-7%	-2%
Lifestyle CHC	662	+4%	-1%	+2%
Total	4,617	+9%	-2%	-1%

After years of flat or declining sales, France's CHC market returned to growth, helped by a bounce back in CCA sales (albeit after a steep prior-year decline). Despite the CCA resurgence, the category experienced relatively low levels of NPD; those marketers that did invest tended to focus on natural options. Ongoing pandemic made wellness a priority for consumers, with a shift to preventive options benefiting VMS. In saturated categories, marketers look to attractive and on-the-go formats as a route to growth, with a particular focus on gummies and orodispersible options. Generics typically performed well and this trend may continue as the cost of living rises. Homeopathics (extremely popular in France) were dereimbursed in 2021. Major switches in recent years have come via the EU centralised procedure, and the market is characterised more by reverse switches and withdrawal of self-selection status than Rx-to-OTC switches. Pharmacy channel remains dominant and consumers have a positive relationship with pharmacists; the self-selection list was expanded in 2020 and 2022.

France leading CHC marketers & brands mid-2022 (*MSP, $mn*)

Marketer	$mn	mid-22/ mid-21	Brand	$mn	mid-22/ mid-21
Sanofi	714	+15%	Doliprane (Sanofi)	546	+17%
Pierre Fabre	228	+3%	Dafalgan (Taisho)	104	+8%
Taisho	224	+15%	Ricola (Solinest)	88	+18%
Bayer	182	+2%	Efferalgan (Taisho)	55	+15%
Cooper CH	157	+10%	Kardegic (Sanofi)	55	-13%
Viatris	151	+4%	Bion 3 (P&G)	47	+1%
J&J	126	+9%	Permixon (Pierre Fabre)	47	+10%
Servier	125	+9%	Nicorette (J&J)	47	+8%

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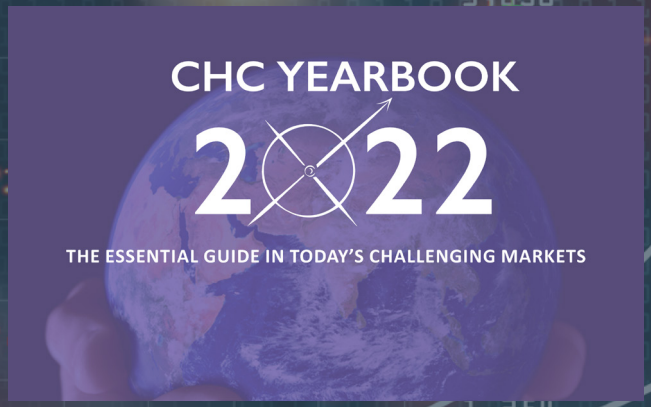

Nicholas Hall Europe Ltd, 35 Alexandra Street, Southend-on-Sea, SS1 1BW, UK
E: info@NicholasHall.com • W: www.NicholasHall.com • T: +44(0)1702 220 200

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