

Nicholas Hall's Mid-2024 CHC Review

(93 Pages)

Definitions & methodology (2 pages)

Global Overview (10 pages)

Slowing sales prove current lack of underlying growth in CHC (2 pages)

Retail CHC growth slows, advancing just 4.0% to mid-2024

Chart: Global CHC sales mid-2023 & mid-2024 (MSP, \$mn)

Chart: Global CHC sales by region mid-2024 (MSP, \$mn)

Chart: Global CHC sales by category mid-2024 (MSP, \$mn)

Competitive landscape (3 pages)

M&A activity hots ups, with spin-offs and demergers at the top of the CHC rankings and increased private equity involvement

Chart: Global Top 10 CHC players mid-2024 (MSP, \$mn)

Chart: Global leading CHC brands mid-2024 (MSP, \$mn)

Innovation & NPD (3 pages)

CHC market sees further slowdown in launch activity, and genuine innovation remains a rarity

Chart: Global launch activity by year 2013-24 (as of end-Oct 2024)

Chart: Global launch activity by major category 2024 (as of end-Oct 2024)

Rx-to-OTC switch (2 pages)

Despite a lack of recent blockbuster switches, selected markets have seen an uptick in switch activity 2023-24

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Chart: Global leading analgesics brands mid-2024 (MSP, \$mn)

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Derma, GIs and Lifestyle CHC the key winners post-pandemic

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Beyond the Top 12 markets

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Chart: USA leading CHC marketers & brands mid-2024 (MSP, \$mn)

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Growth forecast remains low for 2024 before rallying in 2025

Chart: Global short-term forecast sales by category 2024-25 (MSP, \$mn)

Chart: Global short-term forecast sales by region 2024-25 (MSP, \$mn)

Long-term forecast (2 pages)

Some encouraging signs for long-term growth prospects in the CHC market

Chart: Global 5 & 10 year forecast sales by category 2028 & 2033 (MSP, \$mn)

Chart: Global 5 & 10 year forecast sales by region 2028 & 2033 (MSP, \$mn)