

Global Overview | Innovation & NPD

- Notable **3-star** innovations in 2024 (of which there are 63 so far) include:
- **Zooca Original** (Calanus; China, January 2024) – claimed to be the only supplement in the world obtained from the zooplankton *Calanus finmarchicus* (a groundbreaking new source of omega-3), the supplement is positioned to improve the pumping efficiency of the heart and functional muscle strength
- **Daye Diagnostic Tampon** (Daye; UK, March 2024) – highly innovative self-diagnostic tampon, indicated to test for common STIs such as chlamydia, gonorrhoea, trichomonas and for BV pathogens, candida, lactobacilli balance and mycoplasma hominis; line extended in May 2024 with **Daye At-Home HPV + Microbiome Screen** (to test for a wider range of medical issues, including HPV 16, HPV 18, 12 other high-risk HPV strains)



- **Difendum 25mg** (NovaMedic; Russia, March 2024) – the first diclofenac 25mg option available OTC in Russia, indicated to relieve acute pain (*see left*)
- **NG Precision+** (Towa; Spain, UK, Italy, Portugal, April 2024) – claimed to be the first at-home pregnancy blood test on the market, detecting (via finger prick blood sample) very low amounts of hCG (10mIU/ml) in the blood



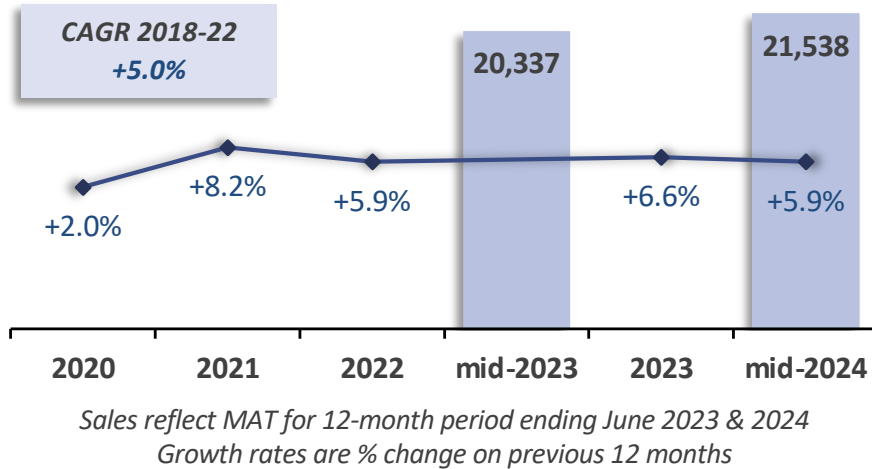
- **Mosquito by Heat It Insekten Stichheiler** (Wepa; Germany, April 2024) – innovative sting treatment works by local heating of the affected skin area to approximately 50°C for a few seconds (“local hyperthermia”), providing extended relief of itching and pain associated with mosquito bites and horsefly, bee and wasp stings; the medical device is designed with 12 treatment modes, including child mode
- **Moistana** (Valenta; Russia, July 2024) – vaginal tablets (hyaluronic acid 10mg, lactic acid 5mg) indicated to relieve and treat vaginal dryness (*see right*); claimed on launch to be the only OTC product of its type in Russia
- **Eve Three Shot Premium** (SSP / Sanofi; Japan, September 2024) – the strongest ever formulation in the Eve series (ibuprofen 195mg, paracetamol 195mg, magnesium oxide 70mg, caffeine 65mg) and the brand’s first line extension in 7 years; “Three Shot” refers to its key selling points (a double analgesic formula, fast-dissolving tablets and stomach-protective ingredients), targeting three major types of pain suffered by Japanese women (headache, menstrual cramps and stiff shoulders)



- **Ovesse** (Aspen; UK, September 2024) – the first OTC estriol medicine in the UK, indicated as a hormonal replacement therapy for vaginal atrophy; clinically proven to restore vaginal oestrogen, it is claimed to relieve dryness, discomfort, itching and pain during sexual intercourse

Category Trends | Gastrointestinals

Global GIs sales mid-2023 & mid-2024
(MSP, \$mn)



- GIs was the fastest-growing major category (from a lower base) in the year to mid-2024, with strong performances from travel-associated categories including antinauseants and antidiarrhoeals (although there has been some deceleration of growth), and notable advances from liver & bile remedies and antispasmodics & IBS remedies

- While NPD remains limited, with not enough genuine innovation, particularly among mature categories, there are plenty of examples of marketers expanding or launching products with added value, including crossover positionings, on-the-go relief, sustainable packaging, etc.

- Probiotics offer an increasing challenge to traditional GIs such as antidiarrhoeals and laxatives via broad digestive health benefits

- **Antacids** posted modest growth, with a fairly flat performance in USA (+1%) contrasting with dynamism in Europe (+11%), where the category continues to witness a high level of NPD and advertising as marketers fight for share in a competitive environment

- Traditional antacids continue to dominate, posting strong growth, notably reviving in USA at expense of PPIs segment; nevertheless, PPIs are well established in many markets and the segment continues to expand in Latin America and Europe

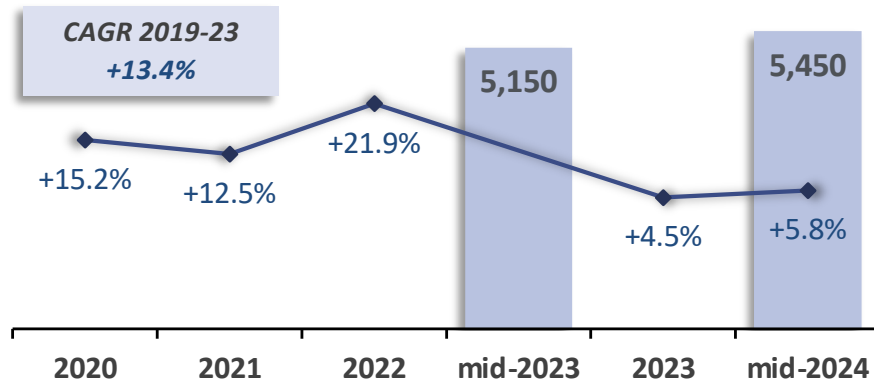
- Expansion of new niches continued via launch activity: in USA, Haleon launched Tums Upset Stomach + Nausea Support with ginger (in Gummy Bites format)

Global GIs sales by category mid-2024 (MSP, \$mn)				
Category	\$mn	mid-24/ mid-23	CAGR 23/19	% share
Antacids	7,379	+4%	+4%	35
Laxatives	4,539	+5%	+5%	21
Liver & bile remedies	1,888	+12%	+7%	9
Antidiarrhoeals	1,730	+7%	+6%	8
Oral rehydration treatments	1,430	+6%	+12%	6
Antinauseants	1,219	+7%	+10%	6
Digestive enzymes	947	+7%	+6%	4
Antispasmodics & IBS remedies	714	+9%	+7%	3
Antiflatulents	666	+5%	+5%	3
Traditional digestive remedies	210	+8%	+6%	1
Other gastrointestinals	816	+1%	+3%	4
Total	21,538	+6%	+6%	100



Core Markets | Brazil

Brazil CHC sales mid-2023 & mid-2024
(MSP, \$mn)



Sales reflect MAT for 12-month period ending June 2023 & 2024
Growth rates are % change on previous 12 months

Brazil CHC sales by category mid-2024 (MSP, \$mn)				
Category	\$mn	mid-24/ mid-23	CAGR 23/19	% share
Analgesics	973	+1%	+10%	18
Cough, Cold & Allergy	836	-6%	+10%	15
Gastrointestinals	650	+9%	+11%	12
Vitamins, Minerals & Supplements	1,630	+10%	+18%	30
Dermatologicals	972	+10%	+16%	18
Lifestyle CHC	388	+14%	+13%	7
Total	5,450	+6%	+13%	100

Brazil's CHC market posted modest growth well below the highs of recent years. Price is now the main factor in purchase decisions for the majority of Brazilians (boosting the performance of many generics and branded generics). Brazil's dengue emergency continued to impact CHC trends, with over 5mn cases reported by mid-2024. Lifestyle CHC was the standout performer owing to strong performances from eye care and sedatives & sleep aids. CCA was the only category to decline, amid a weaker cold & flu season (attributed to higher winter temperatures). Analgesics was also affected by weaker winter demand (and consumers trading down to cheaper options). ANVISA updated its Rx-to-OTC switch guidelines in June 2024, indicating that the agency may be gearing up to accelerate switch activity; OTC industry association ACESSA welcomed the news that the List of OTC Medicines (LMIP) should henceforth be updated more regularly, offering greater predictability and transparency.

Brazil leading CHC marketers & brands mid-2024 (MSP, \$mn)					
Marketer	\$mn	mid-24/ mid-23	Brand	\$mn	mid-24/ mid-23
Hypera Pharma	892	+4%	Dorflex (Opella)	135	-1%
Opella	452	+2%	Buscopan (Hypera Pharma)	99	+11%
NC Farma	370	+6%	Eno (Haleon)	92	+10%
Haleon	223	+7%	Vick (P&G)	79	-6%
União Química	200	+9%	Novalgina (Opella)	78	-6%
Cimed	168	+12%	Neosaldina (Hypera Pharma)	65	+5%
Eurofarma	153	+12%	Halls (Mondelez)	50	-1%
Aché	152	-1%	Benegrip (Hypera Pharma)	50	-6%