

Sexual Health & Fertility

A Hot Topic Report Investigating Consumer Health Opportunities & Challenges

(216 Pages)

Overview (5 pages)

Tapping into the opportunities in Sexual Health & Fertility (5 pages)

Contraception (35 pages)

Daily Oral Contraception (12 pages)

Geographic availability widening

Chart: Global daily oral contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Leading daily oral contraception markets 2023 (MSP, \$mn)

Breakdown of key ingredients

Launch activity increasing in China

Chart: China daily oral contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: China leading daily oral contraception brands 2023 (MSP, \$mn)

Government birth control schemes key in Thailand

Bayer's For Her campaigns reshape sexual health A+P

Category reviving in S Korea thanks to successful launches

Chart: S Korea daily oral contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: S Korea leading daily oral contraception brands 2023 (MSP, \$mn)

Gradual moves towards regulatory reform in other markets

UK growing well from small base

Opill opens up US daily OC market

High growth potential in long term

Chart: Forecast leading daily oral contraception markets 2033 (MSP, \$mn)

Emergency Hormonal Contraception (12 pages)

Mature category sustains growth after pandemic-related spike

Chart: Global emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Leading emergency hormonal contraception markets 2023 (MSP, \$mn)

Regulatory status still under debate in certain markets

While Foundation dominates in USA, new launches perform well

Chart: USA emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: USA leading emergency hormonal contraception brands 2023 (MSP, \$mn)

Yuting's strong position in China a product of continuing A+P

Chart: China emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: China leading emergency hormonal contraception brands 2023 (MSP, \$mn)

India dynamic, although sees little marketer activity

Chart: India emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

UK growing well, with low-cost options particularly popular

Chart: UK emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Generic competition a significant factor across other European markets

Chart: Italy emergency hormonal contraception sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Germany leading emergency hormonal contraception brands 2023 (MSP, \$mn)

Education helps drive growth in underdeveloped markets

As worldwide availability continues to expand, CHC growth is likely

Chart: Forecast emergency hormonal contraception sales in leading markets 2028-33

(MSP, \$mn)

Condoms (11 pages)

Limited scope for innovation in established category

Chart: Condom sales in key markets 2023 (MSP, \$mn)

In USA, leading marketers focus on sexual gratification

Chart: USA leading condoms brands 2023 (MSP, \$mn)

Lower tier in USA sees focus on personalisation and sustainability

Durex positions itself as socially-conscious brand

Family planning schemes expanding in France

Chart: France leading condoms brands 2023 (MSP, \$mn)

Billy Boy focuses on safe sex in Germany with novel app

Female condoms market growing in size

Fertility & Pregnancy (40 pages)

Pregnancy & Ovulation Tests (15 pages)

Testing is becoming easier and more comprehensive

Chart: Selected markets pregnancy tests sales 2023 (MSP, \$mn)

Chart: Selected markets ovulation tests sales 2023 (MSP, \$mn)

Clearblue continues to dominate in USA

Chart: USA leading pregnancy tests 2023 (MSP, \$mn)

Chart: USA leading ovulation tests 2023 (MSP, \$mn)

Clearblue leads in UK by a wide margin

Chart: UK leading pregnancy tests 2023 (MSP, \$mn)

Chart: UK leading ovulation tests 2023 (MSP, \$mn)

Mexico sees strong growth from mid tier

Chart: Mexico leading pregnancy tests 2023 (MSP, \$mn)

Low-cost options common in France

Chart: France leading pregnancy tests 2023 (MSP, \$mn)

Chart: France leading ovulation tests 2023 (MSP, \$mn)

Most brands see sales fall in Germany

Chart: Germany leading pregnancy tests 2023 (MSP, \$mn)

Novel positioning for new entrant to Indian market

NPD: At-home pregnancy test via blood testing

NPD: Saliva-based pregnancy test

NPD: Blood test equivalent hormone tracker

Conception aids for unexplained infertility
Diagnostic fertility tests aimed at men

Pregnancy Vitamins (25 pages)

Brands evolving to meet consumer needs

Chart: Global pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Global pregnancy vitamins sales by region 2023 (MSP, \$mn)

Chart: Global pregnancy vitamins sales by market 2023 (MSP, \$mn)

Chart: Global leading pregnancy vitamins marketers 2023 (MSP, \$mn)

Chart: Global leading pregnancy vitamins brands 2023 (MSP, \$mn)

US growth driven primarily by NPD

Chart: USA pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: USA leading pregnancy vitamins 2023 (MSP, \$mn)

Naturally-formulated options popular NPD trend in USA

Shift to men's preconception health and infertility issues

NPD focuses on overall wellness in pregnancy and postpartum

New entrants increase competition in US market

Declining birth rate poses a challenge in China

Chart: China pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: China leading pregnancy vitamins 2023 (MSP, \$mn)

China's NPD trending towards supplements for fertility issues

Exeltis dominates Mexican market

Chart: Mexico pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Mexico leading pregnancy vitamins 2023 (MSP, \$mn)

Brazilian NPD focuses on both partners' health at conception

Chart: Brazil pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Brazil leading pregnancy vitamins 2023 (MSP, \$mn)

Natele benefits from shift to food supplement status

Clinically-supported brands preferred in Italy

Chart: Italy pregnancy vitamins sales 2019-23, 2028 & 2033 (MSP, \$mn)

Trends & developments in other markets

NPD developments from around the world

Outlook, forecast & opportunities

Chart: Forecast pregnancy vitamins sales in leading markets 2028-33 (MSP, \$mn)

FemTech (13 pages)

Inequalities still exist in women's health

Clue has expanded its women's health partnerships

Thermal therapy device Embr Wave embraces predictive AI

Versalie is Kenvue's "One-Stop-Shop for Menopause Support"

Samphire's Nettle offers innovative solution to menstrual pain

Dynamic FemTech company Mira enters menopause segment

Unfabled redefines women's health e-commerce

Sexual products retailer VUSH extends into wellness via TENS device

Roundup of new and upcoming FemTech activity

Sexual Health Problems (37 pages)

Erectile Dysfunction (21 pages)

High potential for condition afflicting significant number of men

The CHC story so far...

How big can the OTC ED market become?

Chart: Global ED treatments sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Leading ED treatments markets 2023 (MSP, \$mn)

Chart: Forecast ED treatment sales in leading markets 2028-33 (MSP, \$mn)

Poland sees double-digit expansion of its established ED market

Chart: Poland ED treatments sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Poland leading ED treatments 2023 (MSP, \$mn)

UK market expanded via switch of Cialis

Chart: UK ED treatments sales 2019-23, 2028 & 2033 (MSP, \$mn)

Eroxon offers ED sufferers a topical alternative

“Male vitality” supplements provide VMS alternative

Chart: Global sexual health supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Global leading sexual health supplements 2023 (MSP, \$mn)

Premature Ejaculation (4 pages)

Under-discussed condition needs more CHC options

EU-wide switch created new OTC segment in several markets

Female Sexual Dysfunction (5 pages)

Complex condition still not fully understood

Treatment options have made limited advances

Launch activity focuses on supplements

Other NPD & prospects

STDs (7 pages)

Treatment likely to remain Rx but self-testing a growing segment

Growing range of self-test kits for various STDs hitting global markets

Small range of CH products positioned for relief of STD symptoms

Increasing launch activity in HPV care

Intimate Care (29 pages)

Feminine intimate care category has increasing visibility

Chart: Global feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Leading feminine intimate care markets 2023 (MSP, \$mn)

Strong potential for FIC in China, although Western brands face difficult task

Chart: China feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: China leading feminine intimate care brands 2023 (MSP, \$mn)

FIC increasingly competitive in USA

Chart: USA feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: USA leading feminine intimate care brands 2023 (MSP, \$mn)
FIC struggling for sustained growth in France
Chart: France feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: France leading feminine intimate care brands 2023 (MSP, \$mn)
Italian FIC marketers focus on women's health issues
Chart: Italy feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Italy leading feminine intimate care brands 2023 (MSP, \$mn)
Consumer education a key feature of German FIC market
Chart: Germany feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Germany leading feminine intimate care brands 2023 (MSP, \$mn)
FIC dynamic in Mexico, but growth expected to slow in future
Chart: Mexico feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Mexico leading feminine intimate care brands 2023 (MSP, \$mn)
Brazil to be a star future performer in FIC?
Chart: Brazil feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Brazil leading feminine intimate care brands 2023 (MSP, \$mn)
Polish FIC market posts healthy growth
Chart: Poland feminine intimate care sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Poland leading feminine intimate care brands 2023 (MSP, \$mn)
Steady growth predicted globally for FIC
Chart: Forecast feminine intimate care sales in selected markets 2028-33 (MSP, \$mn)
VYI brands increasingly moving into intimate health space
Chart: Global VYI treatments sales 2019-23, 2028 & 2033 (MSP, \$mn)
Chart: Leading VYI treatments markets 2023 (MSP, \$mn)
Chart: Global leading VYI treatments 2023 (MSP, \$mn)
Increasing numbers of probiotics entering intimate care market
Male intimate care expanding

Menstruation (57 pages)

Period Pain (22 pages)

Impact of menstrual pain on women's lives gradually being acknowledged
CHC market primarily medicated pain relief, but most NPD is non-medicated
Among analgesics, options for period pain form sizeable and growing segment
Chart: Global period pain sales 2019-23 (MSP, \$mn)
Chart: Leading period pain markets 2023 (MSP, \$mn)
Leading brands globally mostly outpacing core systemic analgesics market
Chart: Global leading period pain brands 2023 (MSP, \$mn)
USA sees impressive growth for dedicated period pain options
Chart: USA period pain sales 2019-23 (MSP, \$mn)
Chart: USA leading period pain brands 2023 (MSP, \$mn)
Midol given new lease of life following brand relaunch
Start-up Semaine finds new approach to period pain and other issues
Brazil benefits from high levels of brand activity including NPD and A+P
Chart: Brazil period pain sales 2019-23 (MSP, \$mn)

Chart: Brazil leading period pain brands 2023 (MSP, \$mn)

Japan bolsters established segment with NPD and empathetic A+P

Chart: Japan period pain sales 2019-23 (MSP, \$mn)

Chart: Japan leading period pain brands 2023 (MSP, \$mn)

Mexico sees category expand as brands make good use of social media

Chart: Mexico period pain sales 2019-23 (MSP, \$mn)

Chart: Mexico leading period pain brands 2023 (MSP, \$mn)

UK sees launch activity expand category as demand grows

Maxwellia aims to improve healthcare for women via groundbreaking NPD

India goes beyond topical options with key systemic launch

China's TCM-dominated market expands with dedicated options

Developments in other markets point to promising future

Chart: Italy period pain sales 2019-23 (MSP, \$mn)

Chart: South Korea leading period pain brands 2023 (MSP, \$mn)

PMS (7 pages)

What is PMS?

Key ingredients in PMS supplements

Roundup of recent launch activity

Menopause (28 pages)

Herbal menopause supplements in need of innovation

Chart: Global herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Leading herbal menopause supplements markets 2023 (MSP, \$mn)

Research into post-menopausal bone loss solutions continues

New launch in menopause diagnostics from Clearblue

Range of treatment options beyond herbal menopause supplements expanding

TCMs dominate Chinese menopause market

Chart: China herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: China leading herbal menopause supplements 2023 (MSP, \$mn)

US herbal menopause supplements struggling for growth despite NPD

Chart: USA herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: USA leading herbal menopause supplements 2023 (MSP, \$mn)

Category active in Japan as women's health is a hot topic

Chart: Japan herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Japan leading herbal menopause supplements 2023 (MSP, \$mn)

Sales in Europe may be boosted by attempts to break taboos

Chart: Italy herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Germany herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: France herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Spain herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Mexico growing well despite limited consumer promotion

Chart: Mexico herbal menopause supplements sales 2019-23, 2028 & 2033 (MSP, \$mn)

Chart: Mexico leading herbal menopause supplements 2023 (MSP, \$mn)

Small Brazilian market to expand?

Breaking down barriers key to future growth

Chart: Forecast herbal menopause supplements sales in selected markets 2028-33 (MSP, \$mn)