

# Table of Contents

<b>Overview</b>	<b>10</b>	Yuting's strong position in China a product of continuing A+P	34
<b>Contraception</b>	<b>16</b>	India dynamic, although sees little marketer activity	36
<b>Daily Oral Contraception</b>	<b>17</b>	UK growing well, with low-cost options particularly popular	37
Geographic availability widening	17	Generic competition a significant factor across other European markets	38
Breakdown of key ingredients	18	Education helps drive growth in underdeveloped markets	39
Launch activity increasing in China	19	As worldwide availability continues to expand, CHC growth is likely	40
Government birth control schemes key in Thailand	20		
Bayer's For Her campaigns reshape sexual health A+P	21	<b>Condoms</b>	<b>41</b>
Category reviving in S Korea thanks to successful launches	22	Limited scope for innovation in established category	41
Gradual moves towards regulatory reform in other markets	24	In USA, leading marketers focus on sexual gratification	43
UK growing well from small base	25	Lower tier in USA sees focus on personalisation and sustainability	44
Opill opens up US daily OC market	26	Durex positions itself as socially-conscious brand	45
High growth potential in long term	28	Family planning schemes expanding in France	48
		Billy Boy focuses on safe sex in Germany with novel app	49
<b>Emergency Hormonal Contraception</b>	<b>29</b>	Female condoms market growing in size	50
Mature category sustains growth after pandemic-related spike	29		
Regulatory status still under debate in certain markets	30		
While Foundation dominates in USA, new launches perform well	31		

# Table of Contents

<b>Fertility &amp; Pregnancy</b>	<b>52</b>	NPD focuses on overall wellness in pregnancy and postpartum	78
<b>Pregnancy &amp; Ovulation Tests</b>	<b>53</b>	New entrants increase competition in US market	79
Testing is becoming easier and more comprehensive	53	Declining birth rate poses a challenge in China	80
Clearblue continues to dominate in USA	54	China's NPD trending towards supplements for fertility issues	81
Clearblue leads in UK by a wide margin	56	Exeltis dominates Mexican market	82
Mexico sees strong growth from mid tier	58	Brazilian NPD focuses on both partners' health at conception	84
Low-cost options common in France	59	Natele benefits from shift to food supplement status	86
Most brands see sales fall in Germany	60	Clinically-supported brands preferred in Italy	87
Novel positioning for new entrant to Indian market	61	Trends & developments in other markets	88
NPD: At-home pregnancy test via blood testing	62	NPD developments from around the world	90
NPD: Saliva-based pregnancy test	63	Outlook, forecast & opportunities	92
NPD: Blood test equivalent hormone tracker	64		
Conception aids for unexplained infertility	65		
Diagnostic fertility tests aimed at men	67		
<b>Pregnancy Vitamins</b>	<b>68</b>	<b>FemTech</b>	<b>93</b>
Brands evolving to meet consumer needs	68	Inequalities still exist in women's health	94
US growth driven primarily by NPD	72	Clue has expanded its women's health partnerships	95
Naturally-formulated options popular NPD trend in USA	76	Thermal therapy device Embr Wave embraces predictive AI	97
Shift to men's preconception health and infertility issues	77	Versalie is Kenvue's "One-Stop-Shop for Menopause Support"	98

# Table of Contents

Samphire's Nettle offers innovative solution to menstrual pain	99
Dynamic FemTech company Mira enters menopause segment	100
Unfabled redefines women's health e-commerce	101
Sexual products retailer VUSH extends into wellness via TENS device	102
Roundup of new and upcoming FemTech activity	103

## **Sexual Health Problems 107**

### **Erectile Dysfunction 108**

High potential for condition afflicting significant number of men	108
The CHC story so far...	109
How big can the OTC ED market become?	110
Poland sees double-digit expansion of its established ED market	117
UK market expanded via switch of Cialis	119
Eroxon offers ED sufferers a topical alternative	121
"Male vitality" supplements provide VMS alternative	126

### **Premature Ejaculation 129**

Under-discussed condition needs more CHC options	129
EU-wide switch created new OTC segment in several markets	131

### **Female Sexual Dysfunction 133**

Complex condition still not fully understood	133
Treatment options have made limited advances	134
Launch activity focuses on supplements	135
Other NPD & prospects	137

### **STDs 138**

Treatment likely to remain Rx but self-testing a growing segment	138
Growing range of self-test kits for various STDs hitting global markets	139
Small range of CH products positioned for relief of STD symptoms	143
Increasing launch activity in HPV care	144

# Table of Contents

<b>Intimate Care</b>	<b>145</b>	<b>Menstruation</b>	<b>175</b>
Feminine intimate care category has increasing visibility	146	<b>Period Pain</b>	<b>176</b>
Strong potential for FIC in China, although Western brands face difficult task	149	Impact of menstrual pain on women's lives gradually being acknowledged	176
FIC increasingly competitive in USA	151	CHC market primarily medicated pain relief, but most NPD is non-medicated	177
FIC struggling for sustained growth in France	155	Among analgesics, options for period pain form sizeable and growing segment	178
Italian FIC marketers focus on women's health issues	157	Leading brands globally mostly outpacing core systemic analgesics market	179
Consumer education a key feature of German FIC market	159	USA sees impressive growth for dedicated period pain options	180
FIC dynamic in Mexico, but growth expected to slow in future	161	Midol given new lease of life following brand relaunch	182
Brazil to be a star future performer in FIC?	162	Start-up Semaine finds new approach to period pain and other issues	184
Polish FIC market posts healthy growth	163	Brazil benefits from high levels of brand activity including NPD and A+P	185
Steady growth predicted globally for FIC	164	Japan bolsters established segment with NPD and empathetic A+P	187
VVI brands increasingly moving into intimate health space	165	Mexico sees category expand as brands make good use of social media	189
Increasing numbers of probiotics entering intimate care market	169		
Male intimate care expanding	172		

# Table of Contents

UK sees launch activity expand category as demand grows	191	TCMs dominate Chinese menopause market	214
Maxwellia aims to improve healthcare for women via groundbreaking NPD	192	US herbal menopause supplements struggling for growth despite NPD	216
India goes beyond topical options with key systemic launch	193	Category active in Japan as women's health is a hot topic	222
China's TCM-dominated market expands with dedicated options	194	Sales in Europe may be boosted by attempts to break taboos	224
Developments in other markets point to promising future	195	Mexico growing well despite limited consumer promotion	231
<b>PMS</b>	<b>198</b>	Small Brazilian market to expand?	232
What is PMS?	198	Breaking down barriers key to future growth	233
Key ingredients in PMS supplements	200		
Roundup of recent launch activity	201		
<b>Menopause</b>	<b>205</b>		
Herbal menopause supplements in need of innovation	205		
Research into post-menopausal bone loss solutions continues	209		
New launch in menopause diagnostics from Clearblue	210		
Range of treatment options beyond herbal menopause supplements expanding	211		