

# Sexual Health & Fertility 2021

## A Hot Topic report from Nicholas Hall's CHC Reports

(258 Pages)

Definitions & methodology (2 pages)

### **Overview** (9 pages)

#### Sexual Health & Fertility intro (1 page)

Introduction

Nicholas Hall writes

Six key areas covered in this report

#### Sexual Health & Fertility in the news (3 pages)

Recent sexual health developments showcase a vibrant and exciting area of consumer healthcare

Sildenafil switch on the agenda in Germany

Atomo's HIV self-test available OTC in Australia

A new concept to avoid conception

The Rite Aid for genital herpes?

Bayer wants Ozzies to get intimate

O Positive goes with the Flo

Contraceptive pill goes OTC in UK

Equelle highlights lack of menopause conversations

M8 licenses Futura ED gel in L America

#### Birth and fertility rates declining, particularly in developed markets (2 pages)

Lower birth & fertility rates as more people put parenthood on hold

*Chart: Selected countries crude birth rate 2021*

*Chart: China birth rate data 1979-2020*

#### Pandemic's effects on sexual activity mixed (1 page)

Levels of sexual activity impacted slightly by pandemic, but greater impact was on purchasing patterns

#### Female empowerment a significant growth driver (1 page)

FemTech illustrates the important shift in gender dynamics that is expanding women's health

### **Contraception** (49 pages)

2019 UN study provides insight into birth control use worldwide (4 pages)

*Chart: Estimated numbers of women of reproductive age using various contraceptive methods worldwide 2019*

*Chart: Trends in contraceptive prevalence by method among women of reproductive age, by region, 1994 and 2019*

## **Daily OC (15 pages)**

UN reports significant increase in daily OC use 1994-2019 (1 page)

Overview of key ingredients (1 page)

Potential for category to expand outside Asia (1 page)

*Chart: Global daily OC sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading daily OC markets mid-2021 (MSP, \$mn)*

China's dominant brand Yasmin benefits from challenging A+P (2 pages)

*Chart: China daily OC sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: China leading daily OC brands mid-2021 (MSP, \$mn)*

South Korea's market opening up via NPD (3 pages)

*Chart: S Korea daily OC sales mid-2019 & mid-2020 (MSP, \$mn)*

*Chart: S Korea leading daily OC brands mid-2021 (MSP, \$mn)*

India sees daily OC reform (1 page)

*Chart: India daily OC sales mid-2019 & mid-2020 (MSP, \$mn)*

*Chart: India leading daily OC brands mid-2021 (MSP, \$mn)*

Round-up of other markets (1 page)

Hong Kong

Ambitious proposals for daily OC switches in Australia face regulatory roadblock

Switches in UK may open up European market (2 pages)

Category has potential for expansion in the long term (2 pages)

Short-term forecast

*Chart: Global daily OC 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

*Chart: Global leading daily OC markets forecast 2030 (MSP, \$mn)*

## **Emergency hormonal contraception (17 pages)**

Broad geographic availability, but challenges remain (2 pages)

*Chart: Global EHC sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading EHC markets mid-2021 (MSP, \$mn)*

USA dominated by single marketer (2 pages)

*Chart: USA emergency hormonal contraception sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: USA leading EHC brands mid-2021 (MSP, \$mn)*

Plan B One-Step a key player in the US market (1 page)

*Chart: Plan B sales 2016-20 (MSP, \$mn)*

China's No.1 brand supported by extensive health education (2 pages)

*Chart: China emergency hormonal contraception sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: China leading EHC brands mid-2021 (MSP, \$mn)*

India faces challenge from widened availability of daily OC (1 page)

*Chart: India emergency hormonal contraception sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: India leading EHC brands mid-2021 (MSP, \$mn)*

Italy slow to liberalise EHC market, but saw sales surge in 2021 (1 page)

*Chart: Italy emergency hormonal contraception sales mid-2020 & mid-2021 (MSP, \$mn)*

Germany faces growing generic competition for brands (2 pages)

*Chart: Germany emergency hormonal contraception sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Germany leading EHC brands mid-2021 (MSP, \$mn)*

Plan B and ellaOne key players in other top markets (2 pages)

Spain

Canada

UK

ellaOne's #MyMorningAfter campaign raises awareness

Steady growth, with some potential for switches (3 pages)

Short-term forecast

*Chart: Global emergency hormonal contraception 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

*Chart: Global leading EHC markets forecast 2030 (MSP, \$mn)*

## **Condoms (13 pages)**

Popular form of contraception seeing diversification of key brands (2 pages)

*Chart: Selected markets condom sales 2020 (MSP, \$mn)*

In USA lower-tier options outperformed established leading brands (1 page)

*Chart: USA leading condoms 2020 (MSP, \$mn)*

Marketing in Brazil promotes safe and enjoyable sex (1 page)

*Chart: Brazil leading condoms 2020 (MSP, \$mn)*

Trojan retains commanding lead in USA thanks to focus on pleasure (1 page)

Durex has built a foundation of socially-conscious marketing (4 pages)

Reckitt extends Durex into sex toys and aids to bring together consumer health and bedroom activity

Female condoms a growing segment (3 pages)

Female condoms fulfil an unmet need in contraception market, not only among women

The Female Health Company

Cupid

IXu's VA expands female condom market in Europe and USA

## **Other contraceptives (4 pages)**

Spermicides available in pharmacies in certain markets (1 page)

Alternative methods generally HCP-focused (2 pages)

Non-hormonal alternative contraceptives have advantages and disadvantages over competition

## **Fertility & pregnancy (46 pages)**

### **Pregnancy & ovulation tests (17 pages)**

Established category with generally high demand (2 pages)

Consumerised US market maintained growth (1 page)

*Chart: USA leading pregnancy tests 2020 (MSP, \$mn)*

*Chart: USA leading ovulation tests 2020 (MSP, \$mn)*

Clearblue an international success via many firsts (2 pages)

First Response focuses on speed of results (2 pages)

US innovations driven by female-led companies (1 page)

Modern Fertility focuses on building a community (2 pages)

Clearblue an innovative presence in UK (2 pages)

*Chart: UK leading pregnancy tests 2020 (MSP, \$mn)*

Generic competition significant in Germany (1 page)

*Chart: Germany leading pregnancy tests 2020 (MSP, \$mn)*

First Response a bright spot in Australian market (1 page)

*Chart: Australia leading pregnancy tests 2020 (MSP, \$mn)*

Sales in Brazil dynamic despite lack of A+P (1 page)

*Chart: Brazil leading pregnancy tests 2020 (MSP, \$mn)*

Generics a significant presence in France (1 page)

*Chart: France leading pregnancy tests 2020 (MSP, \$mn)*

## **Pregnancy & pre-pregnancy vitamins (27 pages)**

Conception through to pregnancy (1 page)

Pregnancy vitamins ensure optimal nutrient needs achieved

Pre-pregnancy vitamins help set the stage for a healthy pregnancy

Key vitamins & their benefits (2 pages)

*Chart: Selected pregnancy & pre-pregnancy vitamins and their reported benefits*

Importance of HCPs / NPD focus (1 page)

Conflicting advice regarding pregnancy vitamins can leave consumers confused

Key NPD trend: Marketers develop all-round pregnancy brands

Global trends (2 pages)

Frequent NPD in selected markets boosts sales despite declining birth rates

*Chart: Global pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading pregnancy vitamins markets mid-2021 (MSP, \$mn)*

USA bolstered by NPD and premium-price launches (5 pages)

*Chart: USA pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: USA leading pregnancy vitamins mid-2021 (MSP, \$mn)*

China finds growth despite falling birth rates (3 pages)

*Chart: China Pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: China leading pregnancy vitamins mid-2021 (MSP, \$mn)*

Greater competition for Elevit from latest foreign entrants?

Italy sees top tier perform well (1 page)

*Chart: Italy pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Italy leading pregnancy vitamins mid-2021 (MSP, \$mn)*

Germany dynamic thanks to increasing birth rate (2 pages)

*Chart: Germany pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Germany leading pregnancy vitamins mid-2021 (MSP, \$mn)*

Mexico sees strong showing from leading brands (1 page)

*Chart: Mexico pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Mexico leading pregnancy vitamins mid-2021 (MSP, \$mn)*

Brazil's strong growth driven by two dominant brands (2 pages)

*Chart: Brazil pregnancy vitamins sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Brazil leading pregnancy vitamins mid-2021 (MSP, \$mn)*

Global leading brands (1 page)

*Chart: Global leading pregnancy vitamin brands 2020 (MSP, \$mn)*

Elevit global leading pregnancy vitamin range (1 page)

Case study: Elevit (Bayer)

Femibion a key brand in Europe (1 page)

Case study: Femibion (P&G, Dr. Reddy's)

Outlook (1 page)

*Chart: Global pregnancy vitamins 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

Short-term forecast

Male fertility VMS offers burgeoning niche (2 pages)

Male fertility VMS a developing niche in pre-conception vitamins space

**Other fertility CHC (2 page)**

Fertility lubricants: Small segment sees growing interest (1 page)

**FemTech (16 pages)**

One size does not fit all in women's health (2 pages)

Defining FemTech

Clue an early entrant in FemTech segment (1 pages)

Natural Cycles offers a first-in-class birth control app (2 pages)

Elvie addresses breastfeeding and pelvic floor exercise (1 page)

Peptonic Medical building portfolio of FemTech brands (3 pages)

Vita Health developing innovative menopause app (2 pages)

Prima-Temp partners with CHC brand Enfamil (2 pages)

Vivant extends FemTech apps into India and other Asian markets (1 page)

Conclusions (1 page)

## **Sexual health problems** (41 pages)

Broad range of issues partially addressed by OTC (1 page)

While many sexual problems require HCP or Rx intervention, OTC has a role to play

## **Erectile dysfunction** (21 pages)

Most common sexual dysfunction in men (1 page)

Huge OTC potential for condition afflicting a significant number of men

Sildenafil-based treatments OTC in a handful of markets (1 page)

PDE5 inhibitors still Rx-bound in the majority of markets

*Chart: Global ED treatments sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading ED treatments markets mid-2021 (MSP, \$mn)*

Poland boasts largest OTC market for ED treatments in 2021 (2 pages)

*Chart: Poland ED treatments sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Poland leading ED treatments mid-2021 (MSP, \$mn)*

UK market created by switch of Viagra (1 page)

*Chart: UK ED treatments sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: UK leading ED treatments mid-2021 (MSP, \$mn)*

Viagra Connect makes OTC debut in UK (2 pages)

Case Study: Viagra Connect (Viatris)

New Zealand sees “first in world” OTC reclassification for ED (1 page)

Topical options include Futura’s MED3000 ED gel (2 pages)

Case Study: MED3000 (Futura Medical)

MED300’s mode of action

Switch prospects (3 pages)

USA and China anticipated to generate largest revenues by 2025 & 2030

*Chart: Global leading ED treatments markets forecast 2025 & 2030 (MSP, \$mn)*

*Key elements of successful ED switches*

Forecasts predict a category that could skyrocket with switches (1 page)

Short-term forecast

*Chart: Global ED treatments 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

“Male vitality” supplements offer VMS alternative (1 page)

*Chart: Global sexual health supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading sexual health supplements markets mid-2021 (MSP, \$mn)*

USA offers array of supplements for sexual performance (2 pages)

*Chart: USA sexual health supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: USA leading sexual health supplements mid-2021 (MSP, \$mn)*

Russia’s sexual health supplements continue to decline (1 pages)

*Chart: Russia sexual health supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Russia leading sexual health supplements mid-2021 (MSP, \$mn)*

Limited selection in other markets (1 page)

Latest launch activity among supplements offers little innovation (1 page)

## **Premature ejaculation** (5 pages)

Prevalence and treatment options (2 pages)

Under-discussed condition will benefit from more CHC-focused options

Fortacin’s EU-wide switch brings new OTC treatment (2 pages)

Case Study: Fortacin (Recordati for Plethora Solutions)

Studies show Fortacin’s effectiveness

## **Female sexual dysfunction** (5 pages)

Complex condition slowly gaining acceptance (1 page)

FSD affects a significant number of women but its causes are multiple and diagnosis complex

Available treatment options for FSD (3 pages)

## **Sexually transmitted diseases** (10 pages)

Access to STD testing via health services commonplace (1 page)

Treatment likely to remain Rx but self testing a growing segment (1 page)

Home STD tests



Growing number of home HIV tests in Europe (1 page)

Growing number of markets liberalising access to HIV tests (1 page)

Australian TGA expands availability of Atomo's HIV self-test kits

myLAB BOX a key player in US STD testing (1 page)

myLAB BOX offers wide range of home STD tests

OraQuick groundbreaking oral HIV test / Better2Know premium test kits (1 page)

SH:24 in UK bridges gap between HCPs and self-testing (1 page)

FemiClear offers relief of genital herpes symptoms (1 page)

Self-tests for chlamydia a small segment in German pharmacy market (1 page)

Self-care opportunities exist via co-operation with HCPs

## **Intimate care** (30 pages)

Feminine intimate care has good global spread (3 pages)

*Chart: Global feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading feminine intimate care markets mid-2021 (MSP, \$mn)*

Probiotic supplements for women's health an interesting adjacency

Lactacyd challenge is a TikTok hit in Vietnam

China's FIC market dominated by domestic brands (2 pages)

*Chart: China feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: China feminine intimate care brands mid-2021 (MSP, \$mn)*

USA's FIC growth boosted by NPD and high levels of A+P (4 pages)

*Chart: USA feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: USA leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Summer's Eve removes "harmful" ingredients

Honey Pot premium FIC range causing a buzz (1 page)

*Chart: The Honey Pot sales mid-2020 & mid-2021 (MSP, \$mn)*

Key learnings

Large French FIC market struggled in recent years (3 pages)

*Chart: France feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: France leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Italy's FIC market experiencing ups and downs (2 pages)

*Chart: Italy feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Italy leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Vagisan holds lead of German FIC despite increasing competition (2 pages)

*Chart: Germany feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Germany leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Russian FIC market expanded by NPD (1 page)

*Chart: Russia feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Russia leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Brazil sees high levels of NPD boost FIC growth (2 page)

*Chart: Brazil feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Brazil leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Poland FIC market seeing increasing crossover with sexual health (1 page)

*Chart: Poland feminine intimate care sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Poland leading feminine intimate care brands mid-2021 (MSP, \$mn)*

Global FIC growth expected to accelerate as taboos break down (1 pages)

*Short-term forecast*

*Chart: Global feminine intimate care 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*

VYI brands increasingly branching into FIC (4 pages)

*Chart: Global VYI treatments sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Leading VYI treatments markets mid-2021 (MSP, \$mn)*

*Chart: Global leading VYI treatments mid-2021 (MSP, \$mn)*

Growing trend for male intimate care (3 pages)

*Chart: Some VYI brands position for male thrush*

## **Menstruation** (49 pages)

### **Period pain** (18 pages)

Niche for menstrual pain growing worldwide (1 page)

CHC market offers mixture of general and specific pain brands

In USA Midol faces growing competition from big pain relief brands (4 pages)

*Chart: Midol USA sales mid-2020 & mid-2021 (MSP, \$mn)*

Aleve beats paracetamol for period pain

CBD for period pain?

In China MNCs fight for share with domestic TCM brands (1 page)

Japan has well-developed niche for menstrual pain (2 pages)

Brazil menstrual pain segment developing rapidly (3 pages)

Room for development in many key European markets (5 pages)

Breaking stigma key to building the market in India (1 page)

## **PMS (8 pages)**

Premenstrual syndrome and premenstrual dysphoric disorder (1 page)

What is PMS?

The difference between PMS and PMDD

Causes & symptoms of PMS (1 page)

PMS brings a wide range of symptoms

Common ingredients to alleviate PMS (1 page)

Vitamins & minerals

Herbal & natural remedies

Launch activity among branded PMS remedies (1 page)

Case study: Buscofen PreMestruale (Sanofi)

Case study: AromaFemina Capsules Confort PreMenstruel (Pranarom)

Flo claims to be first PMS remedy in gummy format (1 page)

Case study: Flo PMS (O Positiv)

Consumer preference for drug-free remedies boosts sales of AZO Hormonal (1 page)

Case study: AZO Hormonal Health (i-Health / DSM)

Oxaloacetate, new ingredient approved for PMS symptoms (1 page)

Case study: Jubilance (Terra Biological)

Clinically-proven ingredient gives Jubilance an edge over competitors

## **Menopause (23 pages)**

Herbal menopause supplements sales static globally (2 page)

*Chart: Global herbal menopause supplements sales mid-2020 & mid-2021*

*(MSP, \$mn)*

*Chart: Leading herbal menopause supplements markets mid-2021 (MSP, \$mn)*

Bayer deal sweetens its women's healthcare options

China's herbal menopause supplements growing well (2 pages)

*Chart: China herbal menopause supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: China leading herbal menopause supplements mid-2021 (MSP, \$mn)*

New launches could expand struggling US market (6 pages)

*Chart: USA herbal menopause supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: USA leading herbal menopause supplements mid-2021 (MSP, \$mn)*

Equelle highlights lack of menopause conversations

Japan's sales hit hard by Covid-19 pandemic (2 pages)

*Chart: Japan herbal menopause supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Japan leading herbal menopause supplements mid-2021 (MSP, \$mn)*

European markets in need of a boost (8 pages)

*Chart: Italy herbal menopause supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

*Chart: Germany herbal menopause supplements sales mid-2020 & mid-2021*

*(MSP, \$mn)*

*Chart: Russia herbal menopause supplements sales mid-2020 & mid-2021*

*(MSP, \$mn)*

*Chart: France herbal menopause supplements sales mid-2020 & mid-2021*

*(MSP, \$mn)*

*Chart: Spain herbal menopause supplements sales mid-2020 & mid-2021 (MSP, \$mn)*

Theramex to enter OTC market with Femarelle

Mexico sees category slowly becoming more consumerised (1 page)

*Chart: Mexico herbal menopause supplements sales mid-2020 & mid-2021*

*(MSP, \$mn)*

*Chart: Mexico leading herbal menopause supplements mid-2021 (MSP, \$mn)*

Herbal menopause supplements in need of innovation (1 page)

Short-term forecast

*Chart: Global herbal menopause supplements 5 & 10 year forecast sales 2025 & 2030 (MSP, \$mn)*