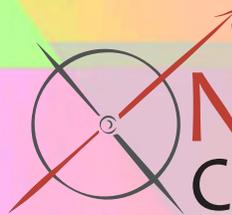


Sexual Health & Fertility

A Hot Topic Report from



Nicholas Hall's
CHC REPORTS

Daily OC | South Korea's market opening up via NPD

- Sales of leading brand **Mercilon** (desogestrel + ethinyl estradiol) were impacted by change in distribution partner from Yuhan to Chong Kun Dang in 2019; in light of this, owner Alvogen increased investment in marketing in 2020, including “Merci-Learn” educational videos and TV ads as well as a new brand website
- Marketing focuses on dispelling misconceptions about use of daily oral contraception, and highlights how the brand has an established international heritage across 43 markets and a strong safety profile
- TV ads with “#LoveMe” hashtag (*see right*) focus on themes of female independence; advertising of contraception in Korea is relatively uncommon and demand for OTC contraceptive pills low despite availability in pharmacies
- Campaigns such as this, as well as renewed interest in advertising of contraceptives such as condoms as ways for women to take more control over their sexual activity, may be a sign of social change which will revive the market; it is likely that a major factor holding back Korea's daily OC market is slow-changing social attitudes to sex



- Following the end of its sales contract for Mercilon in 2019, Yuhan launched **SenseDay**, using its accumulated expertise in promoting contraceptives to support the brand with A+P including an informative website (*see left*); marketing uses the tagline “Lighten the worries in my heart”
- Brand imagery and advertising encourages couples to take shared responsibility for contraception

EHC | Broad geographic availability, but challenges remain

- Emergency hormonal contraception is available **Rx in almost all countries and without prescription in a large number of markets**, but segment **remains underdeveloped in many and is notably absent from a number of key CHC markets including Latin America, Russia (although UTC sales there are reportedly common), Japan and South Korea**
- **In some cases this is because non-prescription access is via family planning clinics and HCPs**, where EHC and other forms of birth control are often dispensed free of charge, rather than in the retail pharmacy channel
- Nevertheless, there are **key advantages to pharmacy availability** where permitted, as it gives women more control over how and when they can access EHC
- This was particularly apparent during the Covid-19 pandemic as **many consumers could no longer easily access HCPs**, leading to EHC marketers recommending women keep a stock at home and make use of mail order and e-Commerce services where available
- In Ireland in 2020, pharmacy chain McCabes partnered with HRA to offer a click & collect service for **ellaOne**, in light of findings that a relatively low number of women used EHC but many would be more likely to do so if it was available online
- Demand in Australia during the pandemic was so high, combined with supply issues, **the TGA implemented supply limits for OTC levonorgestrel in March 2020**

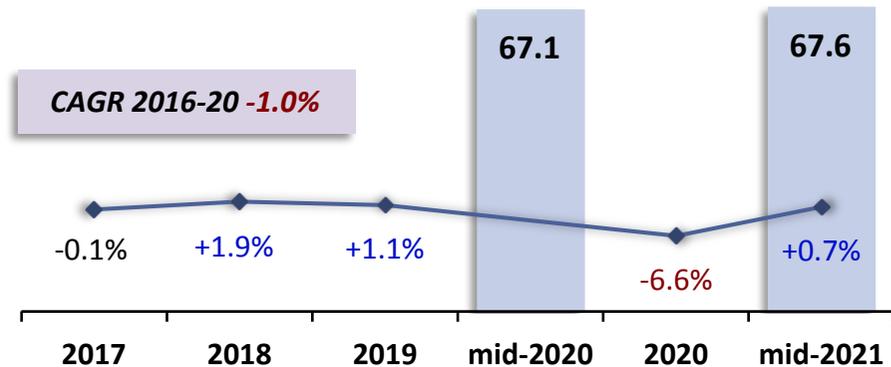


- **2010s saw significant liberalisation both in terms of regulations and social attitudes to EHC access** (and birth control more widely), including EU-wide centralised switch in 2015, and category is now growing well in almost all markets where available
- However, a combination of factors including social opposition and conservative healthcare policies form a significant barrier to future switch, particularly in regions such as the Middle East and Africa

Intimate care | Italy's FIC market experiencing ups and downs

- Feminine intimate care is still taboo for many in Italy; according to a survey conducted by Mylan (now Viatrix) – which markets the leading **Saugella** line – 94% of Italian women consider intimate hygiene extremely important, although 57% regard it as taboo
- Marketers including Viatrix and Ganassini (marketer of Vidermina) support initiatives to promote wider women's health issues as part of A+P activities
- Saugella's plant-based line-up includes options for different age groups (teenagers, post-menopausal women) and needs (daily hygiene, antibacterial action, hydration & soothing)
- Limited-edition Saugella 4Ever floral packs, launched in May 2020, saw a proportion of sales donated to a female health fund, while the Femminile Singolare (Singularly Feminine) TV & digital ad campaign was launched in June 2020 to encourage body confidence and empowerment

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

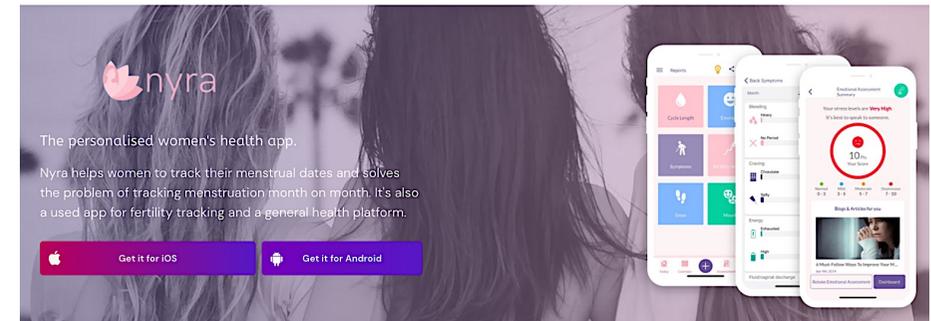


- Viatrix also offered free midwifery consultations on intimate health in Experta pharmacies (aimed at all women)
- The line was extended in October 2020 with Intimo & Corpo shower gel, said to be the first 2-in-1 option for the body and intimate area, formulated with prebiotics, sage extract + lactic acid for everyday use
- **Vagisil** comprises core lidocaine-based vaginal itch cream as well as non-lidocaine options for vaginal hydration, lubrication, intimate hygiene and irritation
- The brand was extended in autumn 2020 with Vagisil Crema Intima 2-in-1 daily use cream under the Vagisil Cosmetic banner; the new presentation is based on prebiotic oats to relieve itch for up to 8 hours



FemTech | Vivant extends FemTech apps into India and other Asian markets

- While the majority of FemTech products are developed and launched in Europe or N America, there is some activity in Asia
- In 2019, Mumbai-based digital health startup Vivant launched **Nyra** across Asia and the Middle East
- There is clear demand for new, tech-driven approaches to women's healthcare in these markets; Vivant claims an estimated 23mn young women in India have had to drop out of school owing to menstrual health issues and poor women's health education
- Vivant has an established presence in e-Health, with a more general service available in its Vivant app, which includes a "health dashboard" to allow users to access health records and make appointments for check-ups at local diagnostic centres as well as access telehealth services and health resources
- In general, e-Health is a channel with strong potential in Asia-Pacific, especially India, as penetration of smart devices is generally growing while access to healthcare and health information has yet to catch up in some areas; easily-accessible e-Health services can help consumers make better-informed health decisions



Description:

Nyra is a free period, fertility & ovulation tracker app that lets you keep track of your menstrual cycles. Period tracker app that helps as a period calculator, allows you to accurately track your period, and flow intensity, it also tracks your fertility, ovulation, lifestyle, steps, and mood swings. Additionally, it also serves as an ovulation calendar, pregnancy tracker, due date calculator, pill reminder, fitness tracker, and physical activity tracker. 5 languages support English, Hindi, Malay, Indonesian, and Tamil. Tracking your PERIOD is now FUN and EASY.

- Aim of Nyra app is to increase access to reliable health information, including via availability in a range of languages (Hindi, Malay, Indonesian and Tamil); lack of resources for non-English speaking women is another inequality in access to healthcare which the new generation of FemTech products is addressing
- As well as support for menstrual health issues, app includes lifestyle and fitness trackers including a pedometer and a fertility tracker (although marketing stresses that this should not be used as a substitute for contraception)

