Canada

- Population 2024: 41.4mn
- CHC sales per capita 2024: $73.52

Chart 46: Canada CHC market by category 2024

Category	$mn	24/23	CAGR
Analgesics	503	-1%	+0%
Cough, Cold & Allergy	642	+1%	+4%
Gastrointestinals	343	+3%	+4%
Vitamins, Minerals & Supplements	916	+2%	+2%
Dermatologicals	291	+3%	+2%
Lifestyle CHC	348	+7%	+4%
Total store sales	**3,044**	**+2%**	**+3%**
Total internet & mail order sales	**526**	**+12%**	**+14%**
Total direct sales	**333**	**-3%**	**-3%**
Total all channels sales	**3,903**	**+3%**	**+3%**

*Source: Nicholas Hall Reports based on **DB6** (MSP); Total all channels sales includes retail sales via stores plus internet & mail order sales and direct sales*

Chart 47: Canada leading CHC marketers & brands 2024

Marketer	% share	Brand	% share
Kenvue	16.0	Tylenol (Kenvue)	6.1
Haleon	12.9	Jamieson (Jamieson)	5.1
Bayer	5.4	Advil (Haleon)	4.3
Jamieson	5.1	Webber Naturals (WN Pharma)	2.2
P&G	5.1	Vicks (P&G)	1.9

*Source: Nicholas Hall Reports based on **DB6** (MSP); retail sales via stores only*

Canada's growth remained modest, with only Lifestyle CHC showing any real dynamism, bolstered by high growth from smoking control; Canada's Tobacco Strategy aims to reach <5% tobacco use by 2035, and saw nicotine pouches restricted to sale in pharmacies only from September 2024, while flavoured pouches were banned. Derma sales improved as largest category wound healers was dynamic and acne remedies were driven by the expanding patch segment, while lip care saw a high level of NPD. CCA growth was limited thanks to a relatively low incidence of flu in early and mid-2024, although cases spiked from October onward. In VMS, multivitamins enjoyed a resurgence, while iron, magnesium and fish oils & omega-3 grew well; demand for more appealing formats such as gummies and mini-tabs drives NPD activity.

Reckitt

Website: www.reckitt.com

Head office: 103-105 Bath Road, Slough, Berkshire SL1 3UH, UK

Total CHC sales (2024): $4.0bn (+3%)

Top CHC brands (2024): Mucinex ($961mn), Nurofen ($649mn), Strepsils ($563mn), Gaviscon ($421mn), Dettol ($321mn)

Principal markets for CHC products

North America (38% of total sales), Western Europe (26%), Asia-Pacific (17%)

Principal CHC categories & brands

Analgesics (22%): Nurofen, Biofreeze, Tempra, Moov, Disprin, Bonjela, Reflex Spray

CCA (46%): Mucinex, Strepsils, Delsym, Nurofen, Lemsip

Gastrointestinals (13%): Gaviscon, Luftal, Picot, Fybogel, Senokot, UpSpring

VMS (7%): Airborne, Neuriva, Digestive Advantage, MegaRed, Move Free, Enfamil

Dermatologicals (10%): Dettol, Clearasil, Intima, Itch-guard, Full Marks, Savlon

Lifestyle CHC (1%): Optrex, Disprin, Cardiprin

- Reckitt's synergistic and tightly-focused Consumer Healthcare portfolio is based on a growing core of high-performing "power brands"
- However, July 2024 saw announcement of actions to reshape the company into a "world-class CHC and hygiene organisation" including organisational streamlining and reduction in size of its portfolio including a complete divestiture of non-core home care brands
- As part of this it will unify its business categories across three main geographies: North America, Europe and the Emerging Markets
- Reckitt is increasing investment in new technologies for marketing, including generative AI; Chief Marketing, Sustainability & Corporate Affairs officer Fabrice Beaulieu claimed in 2024 the technology offered "huge opportunities for growth"
- It has operated in China for 30 years, and in 2025 began construction of a "global R&D centre of excellence" to be opened in 2026
- Reckitt has extended its biggest brand Mucinex from a single SKU on acquisition in 2008 into a comprehensive range spanning most parts of the US CCA market; production capacity was increased in 2024 via acquisition of a new site in North Carolina, focused on key brands including Mucinex

Chart 65: CHC merger, acquisition, alliance & joint-venture activity 2020-2025 (cont.)

Year	Company	Activity
2024	USP Zdrowie	acquired distribution rights to Hepatil and Magnokal Asparaginian from Teva (Poland)
2024	Venture Life Group (VLG)	acquired Health & Her (UK)
2024	WellSpring CH	acquired vH Essentials (USA)
2024	Whan In Pharm	to acquire 30% stake in Bifido (S Korea)
2024	Xiamen Kingdomway Group Co.	acquired Activ Nutritional (USA)
2025	Anatom Holding	to acquire controlling stake in Biogaia (Sweden)
2025	Bain Capital	to acquire Mitsubishi Tanabe Pharma Corporation (Japan)
2025	Ceres Pharma	acquired Kela Pharma (Belgium)
2025	China Resources 999	to acquire a 28% stake in Tasly Pharmaceutical (China)
2025	Clayton, Dubilier & Rice	to acquire 50% controlling stake in Opella (global)
2025	DBAY Advisors	to acquire Alliance Pharma (UK)
2025	DOC Pharma	to acquire Geopharma's product portfolio of nutraceuticals (Italy)
2025	DOC Pharma	acquired Muscoril muscle relaxant from Opella (Italy, Portugal, Czechia)
2025	Egis	acquired Neogranormon topical wound healer range from Teva (Hungary)
2025	Eleat	acquired Bimuno supplement range (UK)
2025	Eurofarma	acquired a 60% stake in Dermage (Brazil)
2025	Everwell Health	acquired Things Of That Nature (USA)
2025	GIC	to acquire minority stake in Cimed (Brazil)
2025	Haleon	acquired additional 33% equity interest in its China j-v Tianjin TSKF Pharmaceutical; to acquire remaining 12% (China)
2025	Handok	to spin off its food and health functional food divisions, renamed Handok Health Functional Food Corporation (S Korea)

continued

Rush of innovation expands cognitive health segment

- With mental health a growing concern among consumers, CHC launch activity has broadened the selection of mental wellness products, including those for cognitive acuity and memory, while clear opportunities exist within pre- and probiotics as awareness of the gut-brain axis grows
- Beyond the dedicated herbal memory & brain health category, magnesium brands have capitalised on proven benefits for stress and mood; innovation here includes new complexes such as magnesium l-threonate
- The COSMOS study in 2024 found daily multivitamin and mineral use can offer "statistically significant benefit for cognition among older people"
- Herbal memory & brain health has traditionally been a category focused on older consumers and maintaining healthy memory during old age, but growing demand from younger people for products to support mental activity, reaction speed & alertness has seen a shift in launch activity, particularly in Asia and the USA
- Recent years have seen significant consumer interest in nootropics and other mental acuity supplements, although as with many emerging VMS segments there are still some questions about efficacy
- Established CHC players may stand out from rivals by stronger focus on scientific backing, such as Reckitt's Neuriva Ultra or Unilever's Olly (e.g. 2024 launch Focused Thinker)
- Proprietary ingredient complexes help brands to stand out, such as Monteloeder's 2024 launch MindRevive, a botanical compound (with rosmarinic acid and rutin) designed to improve short-term memory and cognitive performance in adults
- March 2025 saw launch of Brainspace from XP2, a nootropic powder for focus, mental clarity and memory; brand combines a number of ingredients including proprietary choline forms, mushroom extract and l-tyrosine, a precursor to dopamine and norepinephrine
- Prior to launch the marketer worked extensively to find scientific support for the complex's efficacy, beginning with in vitro analysis of nine botanical compounds to find the most effective ingredients, followed by a 12-week clinical trial
- Other recent proprietary ingredients include Zynamite S (Nektium), a mango leaf extract found in 2025 trials to show "significant improvements in cognitive performance"
- Botalys' Red Panax ginseng was found in a March 2025 study in Nutrients to potentially improve psychological wellbeing and aspects of cognitive function
- While ginseng is a relatively established ingredient in brain health supplements, Botalys' proprietary strain also offers improved sustainability via its use of Biomimetic Indoor Farming technology

Chart 68: Legal status of ingredients in selected world markets

	Australia	Canada	China	Japan	Mexico	N. Zealand	USA
Systemic analgesics							
codeine	Rx	P	Rx	M	Rx	Rx	Rx
diclofenac	P	Rx	P	Rx	M	P	Rx
ibuprofen	M	M	P	M	M	M	M
ketoprofen	Rx	Rx	P	Rx	M	P	Rx
naproxen sodium	P	M	P	Rx[1]	M	P	M
Topical analgesics							
diclofenac	M	M	M	M	M	M	M
felbinac	P	U	P	M	U	P	U
flurbiprofen (lozenges)	M	Rx	Rx	Rx	M	P	Rx
ibuprofen	M	U	M	M	Rx	M	U
ketoprofen	P	U	M	M	Rx	Rx	U
piroxicam	M	Rx	M	U	M	M	Rx
Cough & cold remedies							
acetylcysteine	M	P	P	Rx	M	M	Rx
ambroxol	U	U	P	M	M	U	U
carbocisteine	U	Rx	P	M	M	P	U
dextromethorphan	P	M	M[2]	M	M	P	M
pseudoephedrine	P	P	P	M	U	Rx[3]	M[4]

[1] Approved for OTC switch in 2021 (not yet launched)

[2] Single-ingredient oral DXM formulations reverse-switched to Rx status in 2021

[3] Returned to non-prescription availability in May 2024

[4] Solid form PSE moved to BTC status nationally in 2006

continued

10. New Product Development & Innovation

Overview

- NPD activity is enjoying renewed focus across the CHC industry, amplifying the need to provide clear benefits, keep the consumer in mind and remain aware of healthcare trends
- Innovation is still not a guaranteed route to success, especially as price- and safety-conscious consumers increasingly favour simple, non-medicated options
- Nevertheless, space still exists for "hero molecules" to shake up established categories, and switch remains a priority across most categories
- Products offering a "cleaner" formulation or greater focus on sustainability are increasingly popular with consumers
- Much NPD activity is focused on lifestyle and aesthetic products, as well as novel supplements with niche positionings
- Categories seeing highest levels of NPD 2024-25 include multiple from VMS (hair & beauty, multivitamins, immune supplements, probiotics, herbal memory & brain health) plus sleep aids, acne remedies and systemic analgesics
- Format innovation continues to drive sales of supplements, including confectionery formats like gummies, chews and jelly sticks, as well as orodispersibles
- Despite negative consumer perceptions fuelled by numerous "me-too" innovations and simple line extensions, many marketers are still attracted by new technology / delivery formats, and several CHC players invest in innovation challenges, working alongside new start-ups to find innovations in underserved CHC areas

Analgesics

- Focus of NPD among systemic analgesics has generally been on faster-acting or high-strength options and convenient formats, plus combinations
- Among topicals, ease of use has driven delivery format NPD, including easy-open caps and no-mess applicators, while a trend towards naturals continues
- Delivery format innovations in 2024 included Kenvue's Tylenol Extra Strength Easy to Swallow Caplets in USA (with Gentleglide coating technology) and Opella's BuscoPantys, menstrual underwear marketed by Hypera in Brazil
- High-strength OTC formulations are popular among systemics, with 2024 launches including paracetamol 1,000mg in UK (Perrigo's SolpaOne), diclofenac 25mg in Russia (NovaMedic's Difendum) and meloxicam 15mg (Aflofarm's Opokan Max) and metamizole 1,000mg (Polpharma's Pyralgina Max) in Poland