

Women's Health Obstacles & Opportunities



Women's Health: Obstacles & Opportunities

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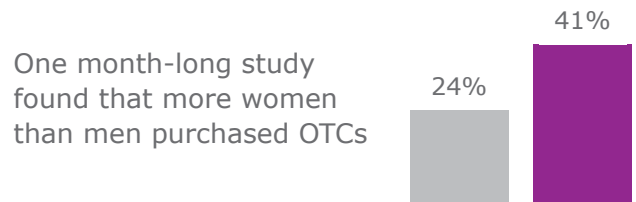
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Introduction

- Women are arguably the key OTC consumers: statistics indicate that in comparison to men they are more likely to visit a pharmacist, more likely to purchase OTCs and more likely to try dietary supplements
- However, these statistics do not mean that the full potential of OTCs for women's health has been reached
- There are significant obstacles within the category which hinder development, with key issues including:
 - » Undertreatment
 - » Doubts over efficacy
 - » Rx competition
 - » Low awareness
- These issues flare up to a greater or lesser degree across many of the categories covered by this report
- Looking at undertreatment, this is especially pertinent when considering age-related concerns, with many common conditions such as overactive bladder and menopausal symptoms simply endured rather than addressed
- VMS options are key across a number of categories covered (e.g. menopause, joint health) and doubts over efficacy form an important obstacle, with conflicting studies leaving women wary of purchasing OTCs
- This can also be seen in a less overt way in categories such as period pain, where women can doubt whether specifically-positioned products truly offer any benefit
- Rx competition is arguably a feature across all aspects of women's health, but it is particularly prevalent in the intimate & sexual health category, where many women are more comfortable approaching a medical professional in regards to diagnosis



82% of women used OTC medication in the last six months to treat at least one of the common ailments from which they suffer



One month-long study found that more women than men purchased OTCs



6 out of 10 women have used a dietary supplement

In the UK approximately two-thirds of buyers in community pharmacies are female



Sources: Proprietary Association of Great Britain and Consumer Healthcare Products Association

Migraine

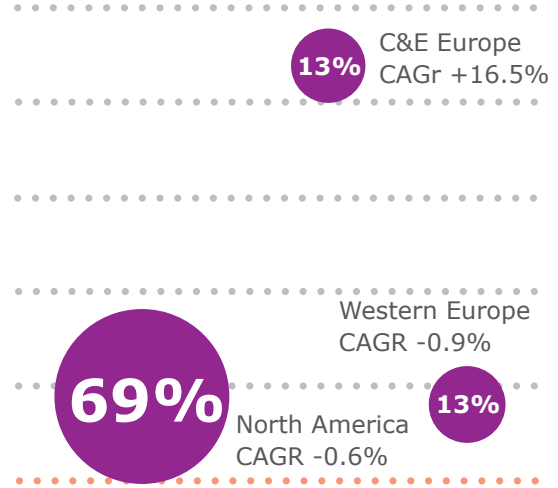
Overview

- While migraines are a condition that affect both men and women, they are more common in women, who account for 75% of migraine sufferers
- In the US alone reportedly 27mn women suffer from migraine – 18% of the female population
- The exact reason for the prevalence of migraines among women is not known, but there are potential links between menstruation and migraines
- With consumers' tendency to self-medicate headaches, and the fact that those who do suffer migraines tend to do so recurrently, the niche is a profitable one for OTC marketers
- In addition, as migraines can be debilitating there is a significant degree of brand loyalty once a successful solution is found (as can be seen through the resurgence of Excedrin Migraine following its return to shelves after recall)
- Available OTC treatments are primarily high-strength fast-acting systemic analgesics, although other options are also available

Latest studies

- ElectroCore's portable vagus nerve stimulation device – gammaCore – may relieve migraine attacks with one application, according to a paper published in **September 2014** in the *Journal of Headache & Pain*.
- Researchers from Milan's Neurological Institute used the device to treat 96 migraine attacks in 30 participants, aged 18-65 years, who suffered 5-9 migraine attacks per month. Participants received one 90-second dose, to the right cervical branch of the vagus nerve. Of the 96 treated attacks, 43 were completely resolved within 30 minutes; 42 did not show benefit within two hours; 11 produced uncertain results – the attack was not resolved, or only produced moderate pain relief.
- In **2013** Sao Paulo Headache Centre researchers found melatonin reduces migraines and is more tolerable than current migraine treatment amitriptyline.
- The researchers randomly allocated 196 participants who experienced 2-8 migraines a month to melatonin 3mg, amitriptyline 25mg or placebo, for three months and 179 participants completed the trial. The researchers found the frequency of headaches was significantly reduced with melatonin compared to placebo, but not compared to amitriptyline (average reductions: 2.7 in melatonin group, 2.18 in amitriptyline group, 1.18 in placebo). Melatonin was tolerated as well as placebo and better than amitriptyline.

Brand profile: Clean & Clear (J&J)



Sales 2013 \$222.7mn	Growth 13/12 +2.1%	CAGR 13/09 +3.0%	Leading Market US (63%)
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- J&J is the dominant player in the acne remedies category with Clean & Clear; the cosmetically-oriented option is positioned for female teenagers
- J&J also fields umbrella skin care brands Neutrogena and Aveeno, which target older consumers; presence of these brands means J&J is unlikely to extend the Clean & Clear range into the older age group
- Range is extensive (*see below*) and is frequently extended, e.g. in the US in 2014 Advantage Oil Absorbing Treatment, with Powder particles technology to target oily skin, launched



- In addition to new launches, brand is supported by high levels of A+P investment; online initiatives are particularly popular and the general slant of A+P is improving confidence

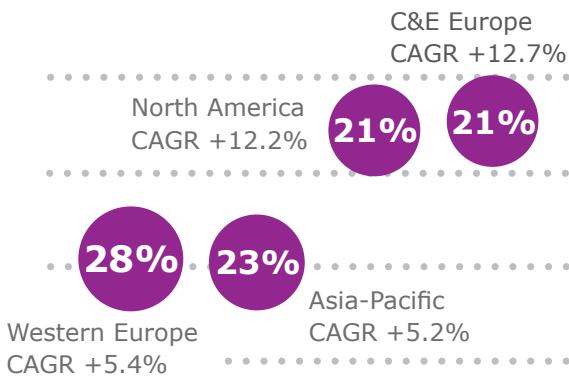
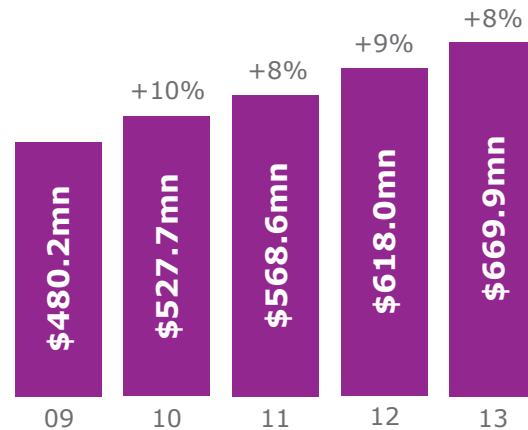


- Over 2014-15 the "See the Real Me" campaign launched in a number of countries (*see US and Indonesian imagery above*)
- Aim of the campaign is to inspire teenage girls not to let their appearance and physical imperfections define them but instead to feel confident and assert their real talents and abilities
- Competitions are popular, e.g. in the UK, as part of the See The Real Me campaign there was a chance to win a tour of Capital FM's Leicester Square studio and to record a pop video

Urinary Tract Infections

Overview

OTC UTI remedies 2013	
Sales 2013	\$669.9mn
Growth 13/12	+8.4%
CAGR 13/09	+8.7%



Leading OTC UTI remedies sales by subregion 2013		
Subregion	\$mn	13/12
Western Europe	186.4	+5%
North America	142.9	+22%
C&E Europe	142.1	+7%
E&SE Asia	138.4	+2%
Latin America	15.1	+32%

- Cystitis and other urinary tract infections (UTIs) are widespread and debilitating conditions that women need to treat on an emergency basis
- Cystitis, meaning 'inflammation of the bladder', causes urgent and frequent need to urinate, and pain (or stinging) when urinating
- Usually the result of an infection in the bladder, it can also be caused by irritation or damage
- Cystitis is more common in women because women have a short urethra (tube that passes from bladder out of the body), and its opening is located very close to the anus; this makes it easy for bacteria from the anus to reach the bladder and cause infection
- Almost all women will have cystitis at least once in their lifetime; around one in five women who have had cystitis will get it again (recurrent cystitis)

Multivitamins & vitamins

- In **Germany** Femibion (see brand profile, p198) is the key pregnancy multivitamin, followed by Centrum Materna (Nestlé) and Gynvital (Bayer)

- Folic acid brands also have a strong presence in the market, led by Folio (Steripharm)

- Folio grew strongly thanks to A+P emphasising its positioning as a pregnancy supplement; brand was extended in 2013 with iodine-free Folio Forte



- Also strongly positioned for pregnant women, as well as for women with an irregular menstrual cycle, folic acid-based Folsan (Abbott) grew well; available in 0.4mg and 5mg strengths, the product is frequently recommended by GPs

- Femibion and Elevit (see brand profiles, p198 and p200) are the key pregnancy multivitamin options in **France**

- In **Spain** Natalben (Italfarmaco) and Gestagyn (Gynea) lead the pregnancy multivitamins segment, which is hampered by the country's low birth rate

- Natalben grew thanks to the popularity of Natalben Supra, which contains omega-3 as well as vitamins, folic acid and iron to cover the nutritional requirements of pregnant women

- The line also includes pre-pregnancy supplement Natalben Preconceptivo, breastfeeding supplement Natalben Lactancia and paediatric version Natalben Desarrollo



- In **Italy** segment sales may have been stifled by Italy's birth rate, which continued to fall in 2013, with the country's rate of 1.41 children per woman ranking at 203rd out of 224 countries, according to government statistics agency Istat

- Materna pregnancy vitamin range is promoted as part of Nestlé's wider pregnancy and baby health range; brand is available as two presentations, core multivitamin and 2012 launch Materna DHA

- Competition to Materna comes from LJ Pharma's Multifolico DHA product with added omega-3 and lutein, which is available at a lower cost per tablet

- In the folic acid segment, there were impressive performances from Chirofol (LJ Pharma, +51% in 2013) and Inofolic (Loli Pharma, +22%), both positioned for pregnant women and winning plenty of support on mothers' blogs

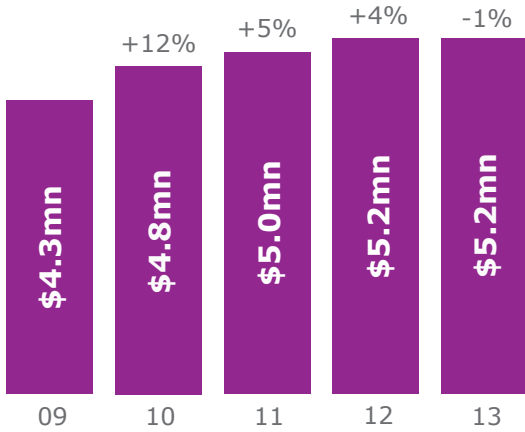
- In the **UK** the pregnancy segment is led by Vitabiotics Pregnacare line, which has a strong mass market presence

- Other key entries are line extensions of wider multivitamin brands, e.g. Bayer's Sanatogen and Pfizer's Centrum

- Looking at A+P efforts, in June 2013 the Bump Buddy iPhone app was launched in support of the Seven Seas Pregnancy sub-brand; features include a countdown to the due date, useful tips and a map containing useful locations such as public toilets, hospital A&E departments and pharmacies



Brand profile: Calmidol (Sanofi)



Sales 2013 \$5.2mn	Growth 13/12 -0.8%	CAGR 13/09 +5.0%	Leading Market Colombia (100%)
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- Sanofi's Calmidol is Colombia's highest-ranking OTC systemic analgesic positioned specifically for the treatment of menstrual pain
- Target audience is young women, and the brand benefits from active social media support, with a dedicated Facebook page and Twitter feed which are updated frequently
- Range includes two presentations: original Calmidol (ibuprofen 200mg, caffeine 30mg) and Calimido Max (ibuprofen 400mg, caffeine 65mg)
- Calmidol Max launched in 2010, driving double-digit growth of brand sales that year
- The extension was advertised on RCN channel, showing a group of young women having fun on a night out; the ad used the tagline "So that its arrival doesn't ruin going out"
- Slight decline in 2014 is the result of increased competition in the category, with ibuprofen + scopolamine combinations proving popular with consumers
- Sanofi has invested in TV ads conveying the idea that thanks to Calmidol, "the expert in menstrual pain", women do not need to stop doing exciting activities during menstruation (see brand website below)

