

# Poland

- Population 2025: 36.5mn
- CHC sales per capita 2025: \$112.92

**Chart 40: Poland CHC market by category 2025**

| Category                                     | \$mn         | 25/24       | CAGR        |
|--|--------------|-------------|-------------|
| Analgesics                                   | 572          | +5%         | +9%         |
| Cough, Cold & Allergy                        | 908          | +0%         | +10%        |
| Gastrointestinals                            | 484          | +6%         | +11%        |
| Vitamins, Minerals & Supplements             | 1,112        | +7%         | +8%         |
| Dermatologicals                              | 589          | +2%         | +9%         |
| Lifestyle CHC                                | 456          | +7%         | +10%        |
| <b>Total store sales</b>                     | <b>4,121</b> | <b>+4%</b>  | <b>+9%</b>  |
| <b>Total internet &amp; mail order sales</b> | <b>349</b>   | <b>+13%</b> | <b>+15%</b> |
| <b>Total direct sales</b>                    | <b>220</b>   | <b>+7%</b>  | <b>+5%</b>  |
| <b>Total all channels sales</b>              | <b>4,690</b> | <b>+5%</b>  | <b>+9%</b>  |

*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 41: Poland leading CHC marketers & brands 2025**

| Marketer    | % share | Brand                 | % share |
|-------------|---------|-----------------------|---------|
| USP Zdrowie | 9.0     | Ibuprom (USP Zdrowie) | 2.9     |
| Polpharma   | 7.9     | APAP (USP Zdrowie)    | 1.4     |
| Aflofarm    | 5.3     | Gripex (USP Zdrowie)  | 1.2     |
| Opella      | 3.9     | Magne B6 (Opella)     | 1.2     |
| Haleon      | 3.5     | Ibuvit (Polpharma)    | 1.2     |

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

Poland’s CHC market posted steady growth in 2025, as consumers continued to trade down to low-cost options. In GIs, growth was driven by NPD in antispasmodics & IBS; previously dynamic ORTs failed to advance. VMS saw gains in low-cost private labels, particularly in probiotics, while multivitamins declined as consumers reduced non-essential spending. CCA sales were flat overall, although systemic cold & flu performed well, supported by the prolonged 2024-25 flu season and shortages of Rx antivirals. Analgesics benefited from strong growth in systemic and higher-strength options. In derma, cold sore and hair loss treatments recorded inflationary growth while wound care was supported by NPD and anti-itch fell from previous highs. Lifestyle CHC was boosted by eye care and sedatives & sleep aids, supported by NPD and higher-strength melatonin launches.

# The Top 25 CHC Brands

## Vicks (P&G)

- Vicks is global No.1 CHC brand, with NPD centred on serving growing consumer trends and unmet needs; sales grew 3% to over \$2bn via launches of herbal options, "high-strength" presentations as well as convenient and easier-to-use delivery formats
- Range includes cold medicines, chest rubs (original), lozenges, cough remedies, decongestants (nasal and oral), allergy remedies and sedatives & sleep aids via ZzzQuil (global sales of \$275mn in 2025; tracked as a separate brand in **DB6**)
- Present across most global regions with varying product line-up, the decades-old brand enjoys high A+P investment as P&G invests in high-profile 360° integrated campaigns to engage consumers at multiple points
- It is one of the most successful examples of umbrella branding as P&G has effectively leveraged brand's long heritage to create established sub-brands in other categories (e.g. ZzzQuil, now global No.1 sedatives & sleep aids brand) and products offering improved benefits targeting specific niches (e.g. DayQuil / NyQuil High Blood Pressure Cold & Flu Relief Liquid Medicine)
- ZzzQuil range is primarily split into two categories: OTC-registered medicated options (diphenhydramine-based liquids and liqui-caps) and supplement-registered naturally formulated options (Pure Zzys / ZzzQuil Natura supplement range)
- Positioned as a safe and effective treatment for the whole family, Vicks benefits from frequent extensions in line with ongoing consumer trends, such as growing popularity of natural and free-from products
- Expanded into systemic analgesics with July 2024 launch of PainQuil for everyday aches & pains, containing 1g of paracetamol; PM variant including diphenhydramine 50mg to support sleep was launched in May 2025
- May 2024 saw expansion into topical analgesics with US launch of Vapofreeze, formulated with menthol and camphor and positioned to deliver fast-acting, penetrating relief for minor muscle & joint pain
- Heavy focus on NPD of DayQuil and NyQuil sub-brands; September 2024 saw expansion of paediatric versions with 'Free of' range, responding to growing parental demand for cleaner products, and July 2025 launch of DayQuil and NyQuil Intense Flu featuring higher dosage formulations
- October 2025 saw relaunch of Nasivin under the Wick banner in Germany; Wick also rolled out no-mess Easy-Applicator VapoRub sticks in September 2025 (as seen before in UK)

## 8. Hot Topics

### Mental acuity and brain health remain bright spots in supplementation

- Mental health is a growing concern among consumers, and CHC launch activity has broadened the selection of mental wellness products, including those for cognitive acuity and memory
- While there is still ultimately a paucity of strong evidence supporting the efficacy of some nootropics and brain health supplements, demand remains steady for key brands, with both Prevagen (Quincy Bioscience) and Neuriva (Reckitt) growing in 2025
- 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
- AIDP's Magtein, a magnesium l-threonate ingredient distributed by ThreoTech was found to have positive benefits for cognitive performance including working and episodic memory and reaction time (Frontiers in Nutrition, Jan 2026)
- 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
- This includes products for computer game enthusiasts; Unilever's Alpha BRAIN benefits from a partnership with esports team OpTic Gaming and promotion in gaming media
- To counter questions about efficacy, marketing generally focuses on scientific credentials of ingredients; presenting mental health benefits as part of a wider range of benefits is key to building consumer trust
- Alpha BRAIN targets athletes in marketing and offers a range of adjacent products such as Pre-Workout for muscle health
- 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

# 10. New Product Development & Innovation

## Overview

- NPD activity continues apace across the CHC industry, amplifying the need to provide clear benefits, keep the consumer in mind and remain aware of healthcare trends
- However, innovation is still not a guaranteed route to success and not all launches offer visible innovation or improvement over established options, especially as price- and safety-conscious consumers increasingly favour simple, non-medicated products or trusted household names
- Nevertheless, space still exists for “hero molecules” to shake up established categories, and switch remains a priority across most categories (with a growing number of notable switches, see Rx-to-OTC Switch chapter)
- Much NPD activity is focused on lifestyle and aesthetic products, as well as novel supplements with niche positionings and devices offering non-medicated alternatives to OTCs
- Categories seeing highest levels of NPD 2024-25 include multiple from analgesics (particularly via switch), antacids, probiotics and adjacent segments, diagnostics and derma (although many launches scored low in terms of innovation)
- Format innovation continues to drive sales, including confectionery formats like gummies, chews and jelly sticks, as well as orodispersibles, drinks and shots and patches
- 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
- While true ingredient innovation is comparatively rare in topical analgesics, July 2025 saw rollout of Zantha range (Composition Health), the world’s first line of topical analgesics formulated with xanthohumol