

OTC Dermatologicals

A Nicholas Hall report on the
Global OTC Derma market



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The diverse OTC derma category began underperforming the overall OTC market in 2015-16. Innovation in key categories has tailed off, while competition is intensifying between registered medicines and unscheduled mass market personal care ranges. Nevertheless, while key categories like acne remedies and lip care have seen sales slump, others have surged ahead. Wound care is enjoying a resurgence, boosted by a raft of Rx-to-OTC switches in Italy and price rises in Russia. In Asia-Pacific, scar treatments and nail antifungals are becoming more prominent thanks to innovation.

Nicholas Hall's latest report will look at the factors driving these performances, investigating trends on a global and local level. Aesthetic benefits are an important claim for many OTC derma brands, but can this learning be applied universally or only in certain markets? What is fuelling the rapid growth in Latin American derma sales? Can Rx-to-OTC switch activity turn around US derma as it has other OTC categories?

The *OTC Dermatologicals* report contains multi-country coverage and detailed reporting of individual categories and brands. Incorporating mid-year 2016 OTC sales from Nicholas Hall's Global OTC Database **DB6**, the report features the latest trends & developments, in-depth brand case studies and vital insight into factors affecting individual markets.

Country chapters drill down to the details, including brand sales and growth, impact of regulatory changes, legal status of key ingredients, product launches, A+P campaigns and category forecasts.

Available as a whole report or as individual country or category chapters, with generous pre-publication discounts.

Key benefits offered by this report:

- The global OTC derma market broken down into detailed country profiles, with individual category sales and developments
- Brands ranked by sales, with performances tracked, including growth rates, A+P campaigns and product innovations
- New launches, line extensions and promotional campaigns covered, plus regulatory changes and their implications
- Success factors behind star derma brands investigated
- Forecast sales data projected for individual derma categories in each market, with challenges and opportunities highlighted

Australia • Brazil • Canada • China • France • Germany • India
Italy • Japan • Mexico • Poland • Spain • Russia • UK • USA

Contents

Global Overview

Including consumer trends, a region by region breakdown and topline category trends

Leading Markets

15 countries profiled, featuring key trends, individual category analysis, regulatory developments, success factors behind leading segments and brands, and forecasts for the future

Brazil – Three of the Top 5 derma brands in Brazil are wound healers, highlighting the importance of the wound care category, which is growing well on the back of A+P and NPD, while among antifungals an OTC VYI segment opened up in 2015.

France – The French are big consumers of OTC dermatologicals; with around 75% of derma sales via pharmacies, support of healthcare professionals is crucial. Will reimbursement cuts see more pure OTC derma brands launched?

USA – Derma has lagged behind other US categories in Rx-to-OTC switch terms, so could FDA approval for Differin Gel (adapalene, Galderma), and a new OTC retinoid acne remedies class, turn around disappointing sales?

Gain further insights and detail on all of the above plus 12 other markets in the dedicated country chapters

Brand Case Studies

Looking at some of the biggest and fastest-growing OTC derma brands and the factors behind their success

Global Outlook

Predicting future prospects for the global OTC derma industry and opportunities & threats in individual markets, including sales forecasts to 2020 and 2025

Featured categories

Acne remedies • Haemorrhoid preparations • Antifungals (general, nail, VYI)
Anti-itch products • Wound care (antiseptics & disinfectants, wound healers, topical antibiotics) • Cold sore treatments • Scalp treatments • Head lice treatments
Hair loss treatments • Wart & verruca treatments • Circulatory aids • Lip care
Feminine intimate care • Eczema & psoriasis treatments

NB: not all categories are featured in all countries profiled

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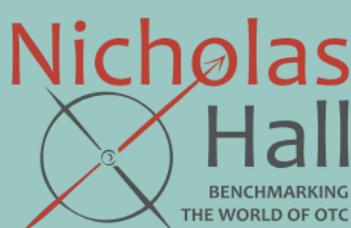
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Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in OTC, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

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Eye Health

Incorporating year-end 2015 OTC sales from our Global OTC Database **DB6**, the report features the latest trends & developments, in-depth brand case studies, and vital insight into factors affecting individual markets.

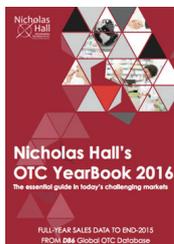
Publish date: September 2016



Vitamins, Minerals & Supplements

This report contains multi-country coverage and detailed reporting of individual categories and brands. It also features in-depth brand case studies, and vital insight into factors affecting individual markets.

Publish date: June 2016



Nicholas Hall's OTC YearBook 2016

Nicholas Hall's bestselling unique reference book contains comprehensive market data through December 2015 drawn from our **DB6** Global OTC database.

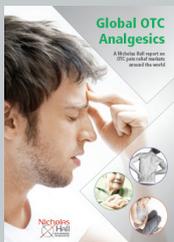
Publish date: April 2016



M&A

In a fragmented OTC market, expansion often means acquisition, but scouting for suitable acquisitions can take a long time. To help shorten that process, our M&A report includes a dedicated chapter identifying 100 companies that present an enticing OTC opportunity.

Publish date: March 2016



Global OTC Analgesics

This report breaks down this integral category to give consumer healthcare executives detailed insight into the uncertainties that are facing brands in today's market, as well as the growth drivers and new opportunities.

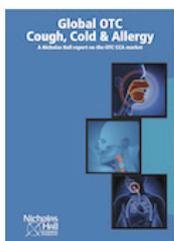
Publish date: November 2015



Nicholas Hall's Global OTC Markets

This report looks at the 12 largest OTC markets. While these markets lead the global industry, their performances differ wildly, showing the diverse nature of the consumer healthcare industry.

Publish date: September 2015



Global OTC Cough, Cold & Allergy

This comprehensive report offers a detailed analysis of the CCA market from both a global and country level, giving OTC marketers a detailed insight into the trends and developments that are impacting both brands and consumers.

Publish date: June 2015

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