

HEALTHY AGEING

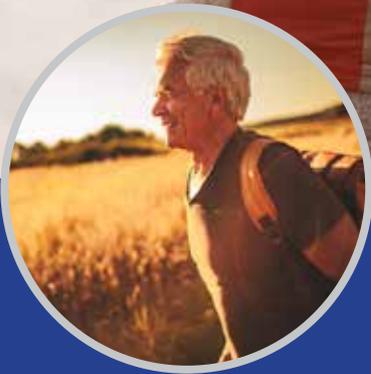
The Expanding OTC Market for 50+ Consumers

12 markets covered:

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

OTC areas covered:

- Osteoarthritis & joint pain
- Calcium supplements
- Menopause supplements
- Memory & brain health
- Eye health supplements
- Circulatory aids
- Urinary products
- Systemic cardiovasculars
- Erectile dysfunction



 Nicholas Hall's
OTC REPORTS

Key benefits of this report:

- Detailed country profiles offer individual category sales, developments, growth drivers and negative factors
- Brands are ranked by sales, with performances tracked, including growth rates, A+P campaigns and product innovations
- New activities including launches, line extensions and promotional campaigns are covered
- Case studies assess brands successfully positioned to appeal to this expanding demographic
- Key trends and new opportunities are highlighted, including forecast sales data for individual categories



Nicholas Hall

Chairman & CEO
Nicholas Hall Group
of Companies

An Ageing Population

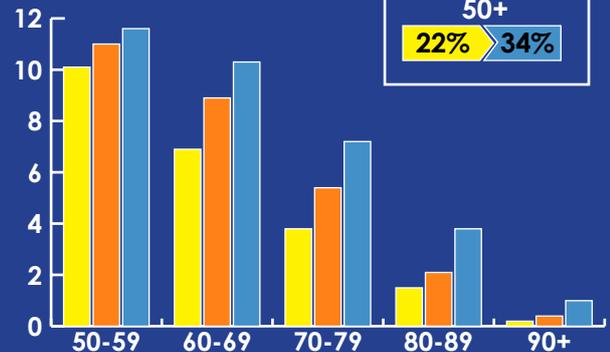
Consistently low birth rates and higher life expectancy are transforming the shape of the global age pyramid; probably the most important change will be the marked transition towards a much older population structure, a trend that is already apparent in several developed markets. **People 65+ already outnumber children under 14 in many developed countries like Japan, Germany and Italy, where 1 in 5 people are already aged over 65.**

65+



50+ age groups: proportion of total global population (%)			
Age	2015	2030	2050
50-59	10.1	11.0	11.6
60-69	6.9	8.9	10.3
70-79	3.8	5.4	7.2
80-89	1.5	2.1	3.8
90+	0.2	0.4	1.0

Source: US Census Bureau



As the proportion of the global population that is aged over 50 steadily increases, so the demand for solutions to the myriad associated problems with older age rises. With up to five decades of a person's life after 50, the rapidly-growing market for Healthy Ageing encompasses a broad demographic group – from those who recently entered their 50s and want to maintain their quality of life, stay fit and ward off illness, to the very elderly who may be managing long-term chronic illness and recurring health problems.

The proportion of the global population aged 50+ will rise from 22% in 2015 to 34% in 2050, growing far faster (+94%) than those aged 0-49 (+11%). **The group growing most rapidly is those aged over 80, more than trebling in size by 2050 (+254%).**



This report focuses on the existing market for Healthy Ageing OTCs, tracking individual categories and brands, including sales, growth rates, trends, new launches and A+P, as well as looking out for fresh opportunities. Sales data incorporates mid-year 2016 OTC sales from Nicholas Hall's Global OTC Database **DB6**.

One of the key OTC areas covered by this report is **Osteoarthritis & Joint Pain** (comprising selected analgesics and herbal & natural joint health products, plus certain single vitamins). The category is segmented into OA specific treatments, products with an OA indication, non-medicated joint health, and joint pain relief (no OA indication). Sales amount to \$8bn+ in the 12 leading OTC markets.



One in 3 believe stores do not cater to the needs of older consumers by providing aisles dedicated to them.

Are OTC marketers effectively targeting older consumers?

Research suggests that older consumers generally feel ill-served by ads, packaging, labeling and the retail experience. Around half do not see ads that reflect older consumers, and have difficulty finding easy-to-read product labels. With a focus on products aimed at younger generations in ads on TV, in print and online, marketers appear to be giving less attention to older consumers than their spending power warrants.

TABLE OF CONTENTS

Overview

- What is Healthy Ageing?
- Population trends
- Who are the older consumers?
- Spending power
- Unmet needs
- Which OTC categories have healthy ageing focus?
- OTC marketers on the right track?
- Meeting the needs of older consumers
- Looking to the future of healthy ageing

Leading Markets

Detailed country profiles analyse the key trends across healthy ageing categories, with brand detail, OTC sales, A+P examples and forecasts

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Italy
- Japan
- Russia
- UK
- USA

Categories covered in this chapter include:

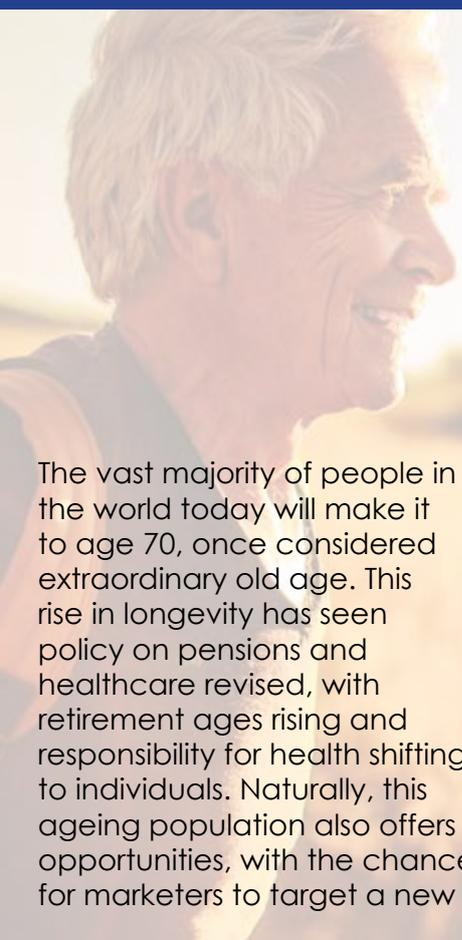
- Osteoarthritis & joint pain
- Calcium supplements
- Menopause supplements
- Memory & brain health
- Eye health supplements
- Circulatory aids
- Urinary products
- Systemic cardiovasculars
- Erectile dysfunction

NB: Not all categories feature in every country profile

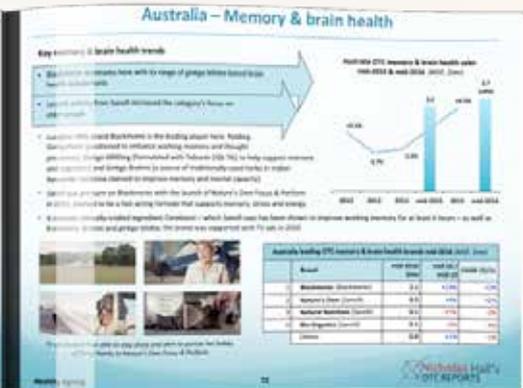
Brand Case Studies

Looking at the success factors behind brands positioned for healthy ageing or targeting older consumers

- Berkeley Life Heart Health
- Botanic Choice
- Centrum Silver / 50+
- Imedeen
- Immun'Âge
- Mentholatum Cabu-Lena
- MitoQ
- Nature's Bounty Healthy Aging
- ReNew Life Ultimate
- Flora Adult 50+
- Supradyn Vital 50+
- Voltaren Max
- Webber Naturals Healthy Aging



The vast majority of people in the world today will make it to age 70, once considered extraordinary old age. This rise in longevity has seen policy on pensions and healthcare revised, with retirement ages rising and responsibility for health shifting to individuals. Naturally, this ageing population also offers opportunities, with the chance for marketers to target a new and expanding demographic.



Healthy Ageing – The Expanding OTC Market for 50+ Consumers *A Nicholas Hall Report*

Discover key trends in this expanding demographic. This report covers the following OTC areas:

- Osteoarthritis & joint pain
- Calcium supplements
- Menopause supplements
- Memory & brain health
- Eye health supplements
- Circulatory aids
- Urinary products
- Systemic cardiovasculars
- Erectile dysfunction

The 12 countries analysed are:
Australia, Brazil, Canada,
China, France, Germany, Japan,
India, Italy, Russia, UK, USA

Each country profile contains market trends, brand info and examples of A+P, with topline and brand sales for individual categories.

How to order:

The report is available as a Country or Global licence.

Country chapters are also available to be purchased individually. Please refer to the payment form for more details.

Contact information:

General enquiry / Order:

info@NicholasHall.com

Contact the Editor:

ian.crook@NicholasHall.com

Telephone: +44(0) 1702 220 200

Website:

nicholashall.com/nicholas-hall-reports/reports/

Nicholas Hall Group of Companies offers the world's most complete OTC marketing & business solutions

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.

Latest Nicholas Hall Reports:



Nicholas Hall's OTC YearBook 2017

Nicholas Hall's bestselling unique reference book contains comprehensive market data through December 2016 drawn from our **DB6** Global OTC database.

Publish date: April 2017



OTC Dermatologicals

This report will look at the factors driving performances in all the major derma markets, investigating trends on a global and local level. It contains multi-country coverage and detailed reporting of individual categories and brands.

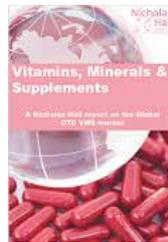
Publish date: November 2016



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.

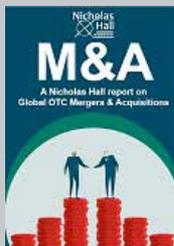
Publish date: September 2016



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: July 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.

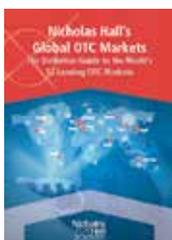
Publish date: March 2016



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

Get in touch!

Discover the world of OTC with the Nicholas Hall Group of Companies. Our range of services covers everything from consultancy and competitive intelligence to events and executive recruitment.

Whatever your needs are in consumer healthcare, we'd like to hear from you!

