Poland | Systemic analgesics

- Stablemate **APAP** (paracetamol) posted strong value growth during the Covid-19 pandemic; volume sales saw a surge in 2020, before declining in 2021
- Extensive product range – including nighttime (+ diphenhydramine) and Extra (+ caffeine) presentations – was extended with APAP Intense tablets (paracetamol 500mg, ibuprofen 200mg) in October 2020, claimed to provide a stronger analgesic effect and work for up to 8 hours
- TV ads for APAP Intense emphasised efficacy against severe pain & inflammation for up to 8 hours

Poland leading systemic analgesics mid-2022 (*MSP, $mn*)

	Brand	$mn	mid-22/ mid-21	21/19	CAGR 21/17
1	**Ibuprom** (USP Zdrowie)	**57.5**	+19%	+12%	+6%
2	**APAP** (USP Zdrowie)	**44.8**	+11%	+25%	+8%
3	**Nurofen** (Reckitt)	**23.5**	+33%	-5%	+1%
4	**Ibum** (Hasco Lek)	**18.2**	+45%	+15%	+8%
5	**Pyralgina** (Polpharma)	**15.2**	+4%	+45%	+14%
6	**Solpadeine** (Perrigo)	**12.2**	+18%	+30%	+14%
7	**Ketonal** (Sandoz / Novartis)	**11.7**	+9%	+15%	+98%
8	**Polopiryna S** (Polpharma)	**6.6**	+11%	+20%	+4%
9	**Etopiryna** (Polpharma)	**6.0**	-2%	+1%	+0%
10	**Dexak** (Berlin-Chemie / Menarini)	**5.3**	+8%	+1%	+0%
11	**Ibufen** (Polpharma)	**5.2**	+83%	-11%	-4%
12	**Gripex Control** (USP Zdrowie)	**5.0**	+22%	+19%	+5%
13	**Opokan** (Aflofarm)	**4.5**	+2%	+31%	+10%
14	**Bayer Aspirin** (Bayer)	**3.8**	-5%	+4%	+0%
	Private labels	**3.4**	+41%	+24%	+22%
	Others	**43.8**	+19%	+19%	+6%

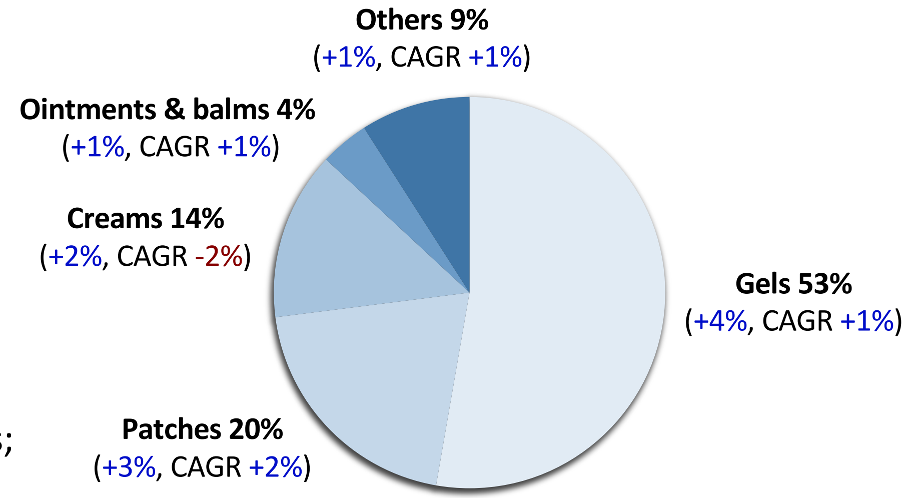
- APAP Migrena (paracetamol 250mg, aspirin 250mg, caffeine 65mg) launched in July 2021; positioned to combat headache and migraine (with or without aura) in adults, it competes directly with Haleon's **Excedrin MigraStop** ($1.9mn, +17%, CAGR +10%), the only other entry with this formula in Poland at the time of launch

Germany | Topical analgesics

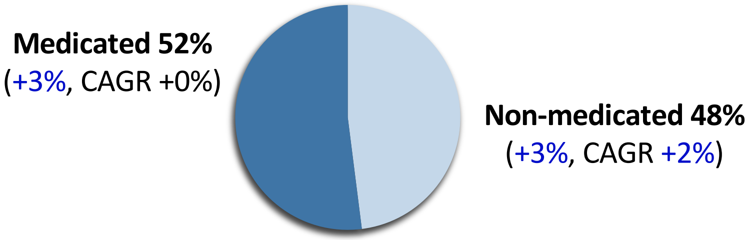
- ThermaCare regularly contributes to good causes: in early 2022 it collaborated with Terre des Femmes to highlight violence against women, donating €2 ($2.21) from every purchase of ThermaCare bei Regelschmerzen in March-April to the women's rights organisation; in late 2022 every purchase helped support four German Red Cross (DRK) cold aid projects for the homeless
- Previous A+P initiatives included offering a free 3-month subscription to Liebscher & Bracht pain therapists app, and in 2021 cashback coupons for larger SKUs in pharmacies and online

- Comfrey-based **Kytta** benefits from rising demand for natural options; TV ads for brand since 2020 feature tagline "The power of nature against pain", showing a woman able to play with her grandchildren in the forest again after Kytta relieves her back pain (*see below*)

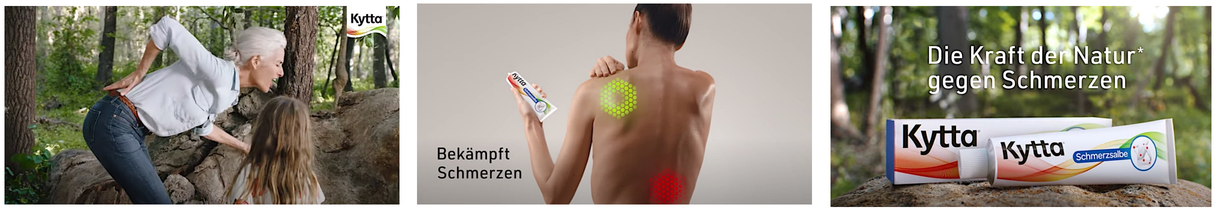
Germany topical analgesics sales by format 2021 (*MSP, $mn*)



Germany topical analgesics sales by medicated / non-medicated presentations 2021 (*MSP, $mn*)



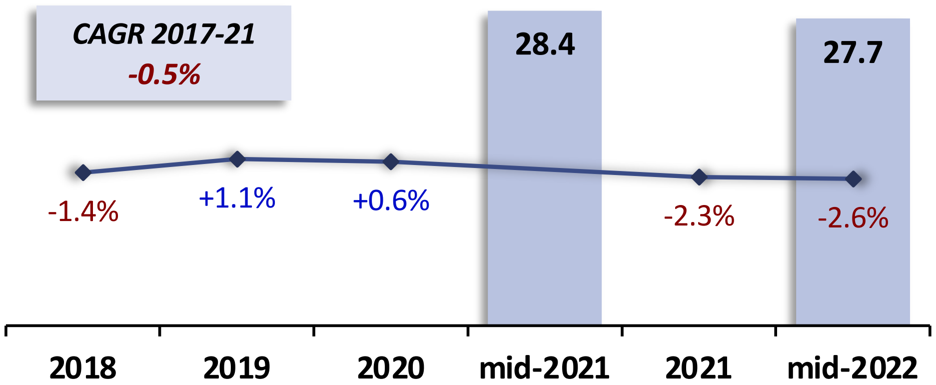
Non-medicated segment comprises brands without traditional allopathic ingredient (NSAIDs, paracetamol, metamizole, etc.) and includes brands with menthol



TV ads feature odourless option Kytta Geruchsneutral

- From March-June 2022, consumers could receive a €2 ($2.21) discount on core Kytta Schmerzsalbe, the bestselling format
- Previous A+P claimed that Kytta is "as strong as diclofenac ointment", emphasising trials claiming it offers comparable relief to diclofenac

France mouth & dental analgesics sales mid-2021 & mid-2022 (*MSP, $mn*)

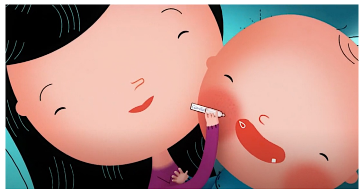


Sales reflect MAT for 12-month period ending June 2021 & 2022
Growth rates are % change on previous 12 months

Key trends & developments

- Topline sales flat, with leading brands struggling for growth; No.1 brand Camilia has perhaps been impacted by ongoing questions around the role and efficacy of homeopathy
- Segments for teething pain (led by Camilia) and relief of oral pain (led by Pansoral)
- Brands here face new competition from EG / Stada's SyntholOral, an extension of popular topical analgesic brand Synthol / SyntholKiné

- Homeopathic **Camilia** maintains its dominant position thanks to TV, print and online ads stressing suitability for teething in babies; promotion carries the tagline "Camilia, to soothe baby during teething"



- No.2 brand in the teething pain segment is Gilbert's **Dolo** range, which includes **Dologel** (medical device; chamomile, propolis, valerian) and **Dolodent** (OTC; amyleine hydrochloride) but receives little consumer promotion
- In October 2020 Gilbert extended its mouth & dental analgesics portfolio with **Dentinéa** homeopathic teething remedy (1ml unidose vials) to tackle pain redness and excess salivation

- Both positioned for oral pain and ulcers, **Pansoral** (cetalkonium chloride, choline salicylate) and **Hyalugel** (sodium hyaluronate) compete closely for the No.2 spot, although there was little A+P support for either brand; Pierre Fabre also fields **Elgydium** (cosmetics and medical devices; for teething and ulcers)

Brazil | Herbal & natural joint health supplements

- Promotion for Condres included the Virtual Condres Run held in May 2021; for every 1,000 athletes that took part in the run, EMS donated 100 units of Condres to people in care homes

- The event was publicised via social media with the hashtag #CorraPorEles (RunForThem)
- Continuing with the sports focus, in September 2022 Condres Performa (NCT-II, BCAA, CoQ10, vitamins & minerals), to increase performance and physical power, was launched
- Launched in 2020, Trio (hydrolysed collagen, non-hydrolysed type II collagen, MSM, vitamins & minerals) is now the biggest-selling presentation of 2016 launch **Colflex**

Brazil leading herbal & natural joint health supplements mid-2022 (*MSP, $mn*)

	Brand	$mn	mid-22/ mid-21	21/19	CAGR 21/17
1	**Condres** (EMS / NC Farma)	**22.2**	+29%	+24%	+13%
2	**Colflex** (Mantecorp / Hypera Pharma)	**16.1**	+36%	+172%	+79%
3	**Motilex** (Apsen)	**11.8**	+6%	+41%	+41%
4	**Artrogen Duo** (Aché)	**4.6**	-15%	-18%	+77%
5	**Disfor / Trifor** (Biolab)	**4.3**	+4%	-6%	-4%
6	**Protena** (Aché)	**3.9**	+7%	+16%	n/a
7	**Extima** (Apsen)	**3.7**	+21%	+23%	+31%
8	**Cartigen** (FQM / Roemmers)	**3.3**	+14%	+96%	+16%
9	**Equaliv Cartliv** (Althaia)	**2.6**	-11%	-20%	n/a
10	**Mobility Artiflex** (Sanofi)	**1.9**	-17%	-30%	-21%
	Others	**25.9**	+41%	+90%	+37%

- Colflex Muscular soluble powder (hydrolysed collagen, hydroxymethylbutyrate, vitamin D; to help synthesis of muscle mass and reduce muscle degradation) and Colflex Hialu tablets (Bioiberica's b-2Cool non-hydrolysed type II collagen, Mobilee – a natural extract rich in hyaluronic acid, polysaccharides and collagen – plus MSM; for joint function and lubrication of synovial fluid) launched in 2021

- Like Condres, Colflex is supported by promotion to HCPs and to consumers via social media

Nicholas Hall's
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