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Nicholas Hall's OTC INSIGHT

EUROPE

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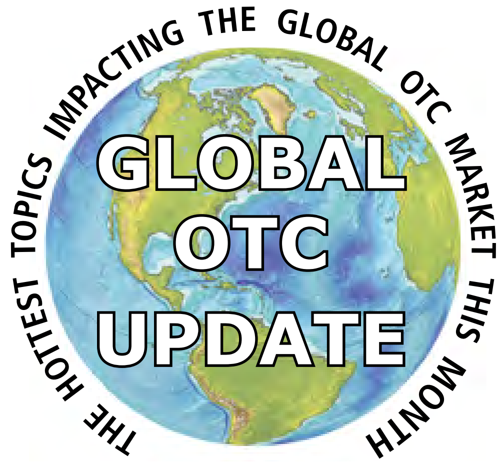

The Editor writes ...

Among the derma categories tracked here, wound healers and the modest haemorrhoid preparations category were the best performers, although inflationary growth in Russia was behind much of this. Head lice treatments also did well from a low sales base – marketers are focusing on prevention as well as treatment and investing in significant A+P support, especially at the back-to-school period. We also profile the active cough & cold category, as a number of players gear up for the crucial winter sales period.

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EUROPE

- Sanofi and Upsa / BMS shake up leading systemic analgesic brands in France, shifting focus from reimbursed to pure OTC options
- Rosta has acquired pharmacy chain Ladushka, which comprises 270 discount stores. The acquisition is expected to make Rosta the No.3 drugstore chain in Russia, with a 3% market share
- Reimbursement for certain low-dose analgesics will be altered in Denmark on 29 February 2016

ASIA-PACIFIC

- Blackmores has formed a j-v with Indonesian OTC marketer Kalbe to facilitate its entry into that market in 2016
- Japanese drugstore chain Matsumotokiyoshi has opened its first overseas store in Bangkok, with another set to be open by end-year
- Self-Care Alliance New Zealand has been launched, aimed at enabling local consumers to prevent disease and manage their own health

NORTH AMERICA

- Walgreens Boots Alliance is to acquire all outstanding shares of Rite Aid for $9 cash per share, or a total enterprise value of around $17.2bn, including acquired net debt
- The American Academy of Pediatrics recommends that the minimum age to purchase tobacco products be increased from 18 years to 21
- Health Canada has approved PharmaRoth Labs' Sucanon type 2 diabetes treatment for OTC sale

LATIN AMERICA

- RB exercises option to acquire handful of BMS' OTCs in Brazil and Mexico, plus its Mexican OTC manufacturing site
- Mexico's FEMSA acquires 60% equity stake in Chile's Grupo Socofar, which owns leading drugstore chain Cruz Verde
- Teva gains access to Mexico's fragmented generics market plus a number of OTCs following purchase of RIMSA for $2.3bn

Trends & developments

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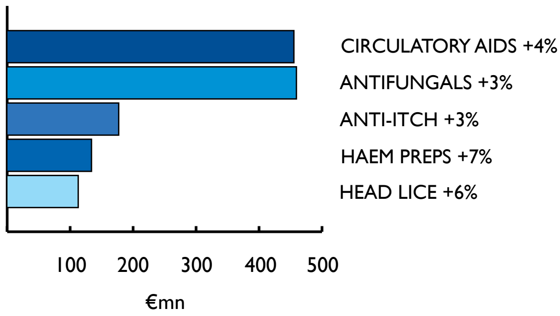
Derma 2: Positive trend continues

AT-A-GLANCE GUIDE: DERMA 2 2015

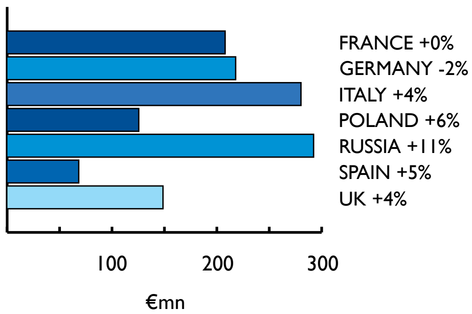
TOPLINE: Combined sales grew by 4%. Germany was the only market to record a decline, resulting mainly from a drop in revenue for the large antifungals category. The two most modest categories, haemorrhoid preparations and head lice treatments, performed best, although for different reasons: the former was largely owing to higher prices (especially high inflationary growth in Russia), while head lice treatments continued to see a high level of marketer investment.

MARKETERS / BRANDS: GSK's presence has been buoyed by brands such as Fenistil and Lamisil following the j-v with Novartis. Regional players make many headlines once again however, such as YouMedical – recently acquired by Trimb Healthcare – which enjoyed success with Nailner, while Aflofarm is growing strongly across a number of categories in Poland.

Derma 2: Sales by category 2015



Derma 2: Sales by country 2015



Europe: OTC Derma 2 2015

(MSP)	FRANCE	GERMANY	ITALY	POLAND	RUSSIA	SPAIN	UK
Circulatory aids	91	40	116	85	100	21	4
Antifungals	58	101	96	11	102	8	81
Anti-itch remedies	23	39	21	10	54	12	19
Haemorrhoid preparations	9	20	28	16	30	11	20
Head lice treatments	26	18	19	4	6	17	25
TOTAL (€mn)	**208**	**218**	**280**	**126**	**292**	**69**	**149**
TOTAL ($mn)	**233**	**244**	**314**	**141**	**327**	**77**	**166**
Index 2015/2014	**100**	**098**	**104**	**106**	**111**	**105**	**104**
Population (mn)	64	81	60	39	144	47	64
Per capita spend ($)	3.64	3.01	5.23	3.62	2.27	1.64	2.59

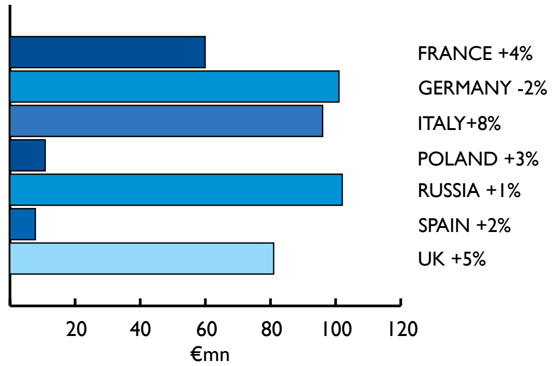
All data in this report full year to end June 2015 (MAT): Nicholas Hall's *OTC INSIGHT* based on Nicholas Hall's ***DB6*** Global OTC Database, in partnership with Nielsen, DSM, PharmaExpert and INSIGHT Health in certain countries. Exchange rates: $/€: 0.89; €/PZL: 4.2; €/Rb: 75.2; €/£: 0.73 based on average figures from 01/09/15-07/09/15 from oanda.com. Owing to changes in channel coverage, data is not directly comparable to last year's *Market Report*

Derma 2: Category analysis

Antifungals

- Topline grew by 3% to €459mn ($514mn)
- A key market in revenue terms, sales dropped in Germany owing to a poor result for nail fungal treatments
- Volume sales took a hit in Russia, with consumers often complaining about high retail prices, although marketers continue to advertise strongly
- Nailner was a major success story, boosted by the launch of a 2in1 version in several countries

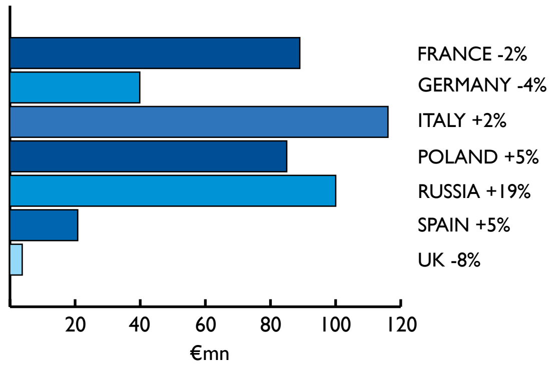
Derma 2: Antifungals sales by country 2015



Circulatory aids

- Sales advanced by 4% to €455mn ($509mn)
- Leading market Italy grew modestly, but the main driver was Russia, with good performances from Poland and Spain
- Many brands have multiple positioning, including relief of "heavy" legs as well as easing minor injuries and preventing / treating haemorrhoids
- While strong in continental Europe, the category has only a negligible presence in the UK

Derma 2: Circulatory aids sales by country 2015



Derma 2: Other category developments

- A rise of 3% for anti-itch remedies – a mixture of insect bite treatments and products for general itching – relied a lot on inflationary 14% growth in Russia. There were only modest advances elsewhere, while Germany and Italy declined (-7% and -1% respectively)
- Haemorrhoid preparations recorded the highest growth overall (+7%). As is often the case, Russia skewed the overall result somewhat (+19%), however Poland (+9%) and Spain (+7%) resulted from a high level of marketer activity. An advance of 3% in the UK followed innovation from J&J for Anusol, with the higher-cost Soothing Relief line extension proving popular with consumers
- Head lice treatments continued to reap the rewards from a high degree of NPD (+6%). Marketers are increasingly focusing on prevention as well as treatment

France

Circulatory aids: Marketers offer "inside & out" treatments

- Ginkor Fort website revamped

Total sales declined by 2%. Leading option Daflon (Servier) fell at a faster pace, but still generates around a fifth of the topline. There is little promotion for the brand, although its long-established market position means that it retains a high level of consumer awareness.

Sales of ginkgo biloba brand Ginkor Fort (Tonipharm / GTF for Ipsen) grew modestly, boosted by TV and online ads in 2014-15. The brand website (ginkorgamme.fr) was revamped in early 2015 and now contains additional lifestyle, exercise and beauty tips to prevent heavy legs. The range comprises Ginkor Fort capsules (OTC) as well as Ginkor Frais gel and Ginkor Spray cosmetics.

Promotion for Endotélon (Sanofi, grape seed extract) continued to use Betty Boop and included POS counter displays. Elsewhere, sales of Hémoclar 0.5% (Sanofi, 30g) are likely to be significantly impacted by the October 2015 recall of 33 lots distributed between June 2011-February 2014. Indicated to relieve mild trauma such as bruises and bumps and so not in direct competition with circulatory aids for heavy legs, the recall is owing to a reduction of active ingredient pentosan polysulfate over time.

Esberiven Fort (CSP for Amdipharm, coumarin and rutin) was promoted via summer 2015 radio ads targeting women, which stressed that the tablet and oral solution offers a natural remedy for tired legs. Bayer promoted Hirucrem Protect (cosmetic) via print ads in summer 2015, highlighting that it is "new" (it replaced Hirucrème in late 2013), while also underlining that it provides SPF20, is water resistant and hydrates skin. Meanwhile, Veinamitol (Negma / Wockhardt, troxerutin) has been supported by summer print and online ads which stress that only one sachet or ampoule is needed per day.

Arkopharma's Vitiven (gel and capsules) was boosted by frequent print and online support stressing the efficacy of red vine leaf extract and inviting consumers to, "Gardez des jambes légères" (Maintain light legs). A 50ml tube of the gel was included as a free gift with the pocket-size June 2015 issue of *Top Santé*.

In other news, Diosmine Cristers 600mg (Marque Verte Santé, 30-tab pack) was added to the self-selection list in December 2014. Omega Pharma / Perrigo extended Phytosun Arôms circulation line with Spray Jambes Légères in March 2015, a cosmetic claimed to boost microcirculation and soothe and refresh tired legs via a formula of essential oils and plant extracts. This can be used on bare legs or on top of tights, although it is not suitable for use by pregnant and nursing women. A 100ml spray costs around €12.50 ($13.99) and is sold in pharmacies and parapharmacies. The marketer suggests using the spray alongside existing ampoules to provide a comprehensive "inside & out" treatment of heavy legs – the line also features two massage oils.

Juva Santé / Urgo extended Juvamine in May 2015 with Jambes Légères, a supplement combining red vine leaf extract, witch hazel, vitamin C, grape seed and ginkgo flavonoids to soothe and tone tired legs. A 30-cap pack costs around €8 ($8.95) and is available in the mass market. Juva Santé positions this as ideal to be used alongside stablemate Mercurochrome Gel Rafraîchissant topical product.

Antifungals: Significant A+P support for nail antifungals

- Marketers invest in high-strength options

Sales of antifungals increased by 4% overall, with general, VYI and fungal nail options all contributing to growth (each segment garners around a third of total sales). Semi-ethicals continue to dominate, while generic options fight for share across the category, although marketers are investing in high-strength and added-benefit branded options in an attempt to secure consumer loyalty.

Among general antifungals, Sandoz / Novartis' econazole, Pierre Fabre's Mycoster (ciclopirox) and PGT's Monazol (sertaconazole) all compete closely at the top of the rankings. Mycoster was extended in autumn 2014 through high-strength 10mg / ml shampoo, which is indicated to treat seborrhoeic dermatitis and reimbursed at 30% when prescribed (60ml). However, the price of this was cut from €6.16 ($6.90) to €5.38 ($6.02) on 1 January 2015.

Monazol and Lomexin (Effik, fenticonazole) lead VYI antifungals, and both are boosted by 30% reimbursement when prescribed. Meanwhile, the price of lower-tier Gyno Pevaryl LP vaginal suppository (J&J, econazole nitrate 150mg) was reduced as of 1 January 2015, with a 1-count pack costing €2.16 ($2.42, previously €4.54 / $5.08) and a 3-count pack €3.87 ($4.33, previously €4.65 / $5.20). Both are reimbursed at 30% when prescribed.

In terms of pure OTCs, Bayer's MycoHydralin (clotrimazole) is the No.1 brand and was extended in April 2015 with a high-strength 500mg vaginal suppository (1-count pack), adding to the 200mg suppository (3-count) and 1% cream (20g). Animated online ads support the line extension and stress that one application is enough to treat infection. All three were added to the self-selection list in 2015.

Generics take the lead among nail antifungals, with semi-ethical Onytec (Bailleul, ciclopirox 80mg / g) and amorolfine from Mylan and Sandoz / Novartis ranking highly – all reimbursed at 30% when prescribed.

There was significant A+P support for pure OTC options. Naloc (Meda for Moberg Pharma) was promoted by TV and radio ads in summer 2015 which stressed that it works quickly and is easy to apply. The medical device is said to provide visible results in 2 weeks. Galderma / Nestlé invested in online banner and video ads for Curanail (amorolfine 5%) in summer 2015 which targeted sports people and asked, "Pret pour la course?" (Ready for the race?), while counter displays were visible in pharmacies.

TV ads backed Excilor (Vemedia) in summer 2015 showing a woman hesitant to wear sandals because of an unsightly fungal nail infection. Promotion stresses that its TransActive technology allows the product to penetrate the nail quickly and block infection, while the ad highlights that the nail does not need to be filed.

Anti-itch: Comprehensive line from Cooper

- **Phénergan 2% cream returns**

Sales of anti-itch options expanded modestly. Merck is the leading player via Apaisyl Après Piqûres roll-on (for insect bites), Onctose Hydrocortisone, Onctose, Osmogel and CortApaisyl (hydrocortisone). In summer 2015, the marketer launched la-super-maman.fr in conjunction with Apaisyl which includes parenting, lifestyle and fashion tips, as well as info on Apaisyl offers and competitions.

Nailner: Sales boosted by 2in1

Nailner, owned by Trimb Healthcare following its acquisition of YouMedical in September 2015, performed well in a number of core markets during the reporting period, with especially dynamic results in Poland (where it is marketed by Vitamed) and the UK. A key factor was the launch of 2in1 lacquer in spring 2015, a brush format that visibly brightens nails within 7 days, while the longer-term action clears the underlying infection. TV ads for the launch emphasise the 7-day improvement claim, which is crucial in a category where treatment can take several months. Nailner is also available in core pen, brush and spray formats.

Cooper's Sédermyl comprises several anti-itch options, including CortiSédermyl (hydrocortisone), Sédermyl (isothipendyl) and FlashSédermyl (ammonia and tea tree oil, 20g). FlashSédermyl is positioned to quickly relieve nettle stings and insect bites and was featured in print advertorials in summer which stressed that it acts immediately to neutralise acid and relieve itching. Sédermyl and CortiSédermyl hold more general anti-itch positioning.

In May 2015, DB Pharma informed HCPs that Phénergan 2% cream (promethazine, marketed by DB Pharma for Sanofi) had returned to normal stocking levels. The cream is indicated to relieve itching caused by insect bites, and is also available in systemic syrup and tablet options which have an anti-allergy positioning.

Haemorrhoid preparations: Humorous A+P for Sédorrhoïde

- Topline modest

Sales fell by 5%, with little A+P support for established brands, while many circulatory aids have dual positioning for haemorrhoids, providing significant competition. Cooper's Sédorrhoïde is the leading haemorrhoid preparation and was among the best performers, boosted by humorous POS materials showing a baboon and stressing that the product has anti-inflammatory, anaesthetic, antiseptic and vascular protection properties. Print advertorials supported the brand in spring 2015. MNCs field several options, including Titanoréïne (J&J, carrageenan, zinc oxide and titanium dioxide) and Phlébocrème (Merck, benzocaine).

Head lice treatments: Consumers get creative

- Elimax launched

The topline was stagnant in the reporting period, although performance may be boosted by significant ad support at the 2015 back-to-school period. Promotion for Pouxit (Cooper for Thornton & Ross / Stada) continued to focus on Pouxit XF (dimethicone 4% and Penetrol), with summer 2015 TV & print ads stressing efficacy. The brand again acted as sponsor of The Voice Kids on TF1 TV channel.

Merck supported Apaisyl Poux via a drawing competition running from 17 August-31 October 2015, which invites children to draw a new brand mascot, with prizes available including trips to Disneyland Paris. The line was also seen on TV, with ads focusing on Xpert and Détect Lentes options and ending with the brand tagline, "Soyez radical, ça soulage" (Be radical, it helps).

Pharmacy shelf displays for Duo LP-Pro (Omega Pharma / Perrigo) have claimed that nine out of 10 mothers are satisfied with the product, while packaging stresses that consumers can receive a refund if the product is not 100% effective.

Puressentiel's head lice treatment range was seen on TV and in print ads, with promotion claiming efficacy in 10 minutes against lice, nits and larva. Meanwhile, window displays in pharmacies supported the repellent spray and carried the tagline, "Éloigner les poux, prévenir l'infestation" (Keep away lice, prevent infestation).

In early 2015, Osytershell Laboratories introduced Elimax shampoo and lotion. Formulated with LPF, the brand is free of insecticides and silicones and is said to be effective in 15 minutes. The marketer claims in TV & print ads that Elimax eliminates and prevents lice.

Meanwhile, Pierre Fabre introduced Poux'Lotion and Poux'Spray under the Naturactive banner during the back-to-school period in 2015. The lotion combats lice from first use, while the spray acts as a repellant. Both contain five organic essential oils and the products are available individually or in a pack with added comb – said to be more effective when used together. At the time of writing, Quies is running a competition on the brand Facebook page, with children invited to draw what they imagine lice do on their holidays. Product packs are available as prizes and include Quies 3-in-1 head lice shampoo, which is said to be effective in 15 minutes. Summer print ads for the brand stated, "Avec Quies, les poux sont HS!" (With Quies, lice are out of action!).

Germany

Circulatory aids: Heavy losses across the category

- Wörwag launches Syntrival

Circulatory aids fell by 4%, with systemic formats – accounting for around 40% of the topline – outperforming topicals, while pharmacy sales contributed over 90% of sales. Generating around a quarter of category revenue, BI's Antistax held on to pole position, advancing by 2%. TV & print ads for the Extra tablet version – the main brand growth driver – throughout the reporting period underlined its formulation with red vine extract, while also reminding consumers that they only need to take one tablet per day to relieve heavy legs.

Following at a distance, Venostasin (Klinge Pharma, horse chestnut) dropped by 5%, with systemic options accounting for around three-quarters of brand revenue and internet sales equivalent to around 40% of pharmacy turnover. Print ads in summer 2014 highlighted the tablets' four key benefits: decreasing the number of vein-damaging enzymes, strengthening veins, relieving pain and heaviness, and reducing swelling.

Heparin Ratiopharm (PGT) and Venoruton (GSK) continued to struggle, both declining by double digits, although internet sales for the former grew by 13%. Aliud Heparin gel and balm (Aliud / Stada) provided stiff competition, growing by 8%, owing perhaps to its relatively low retail price. The generic's performance may improve further following Q3 2015 print ads for the Aliud umbrella range, featuring the tagline,

A banner ad from Antistax.de

"Gesunde Kompetenz hat die geeignete Auswahl für die Hausapotheke" (We have the most suitable choice for your medicine cabinet). Mass market entry Abtei (Omega Pharma / Perrigo) fell slightly.

Notable launches included Syntrival from Wörwag Pharma in November 2014, to prevent blood clotting and promote healthy circulation. Available in 30-count tablets and formulated with tomato extract, print ads for the dietary supplement in Q1 2015 read, "Das gute Gefühl natürlich vorzusorgen" (Get the good feeling naturally).

Antifungals: VYIs grow best

- Ciclopoli stands tall

Sales of antifungals fell by 2%. The largest segment, nail antifungals, accounted for just under half of category sales, although revenue dropped by 5%. General antifungals declined by 1% (34% share), while VYI antifungals grew by 3% (20% share).

Ciclopoli for nail fungus (Taurus / Wertapharm, ciclopirox 8%) led the way, recording a 5% sales increase, with internet turnover (not included in our topline) growing by 12%. Ciclopoli's 3.3ml lacquer (+5%) accounts for around two-thirds of brand turnover, while the 6.6ml size (+6%) contributed the remainder.

Spread over the general and nail antifungal segments, Bayer's Canesten Extra fell by 6% overall, with internet revenue advancing by 2%, equivalent to around a quarter of pharmacy turnover. The brand's athlete's foot options declined by 3%, while nail fungal treatments dropped by 9%, despite TV ad backing for the 2 + 4 week nail kit and cream treatment featuring a woman dipping her infected feet into water, causing all the fish to swim away. A new TV campaign in summer 2015 highlighted the product's speed of action and efficacy. Loceryl for nail fungus (Galderma / Nestlé) dropped by 15%, although internet sales grew by 9%, equivalent to just over a quarter of pharmacy turnover. TV ads for the amorolfine-based entry in Q1 2015 underlined that it need only be applied once a week.

Lamisil (GSK, terbinafine) dropped by 5%, despite TV ad support for the cream option throughout the reporting period claiming it to be, "Die Waffe gegen Fusspilz" (The weapon against athlete's foot). Lamisil Once was the main cause of the overall brand decline, with sales falling by 16%.

Beyond the leading entries, Infectosoor (Infectopharm) grew by 10%, although this is positioned for fungal infections common in small children such as nappy rash, so does not compete directly with other brands here.

Among VYI antifungals, Dr Kade's Kadefungin grew by 9% to capture around 45% of sales. Print ads have backed Kadefungin 3 (3-day thrush treatment). Following at a distance, Canesten Gyn (Bayer, clotrimazole) dropped by 13%, while Dr Wolff's Canifug (clotrimazole) fell by 4%. Stablemate Vagisan grew by 14% however, helped perhaps by summer 2014 print ads telling women how common it is to experience intimate fungal infections. The ads also offered a voucher to buy 1-day Myko Kombi treatment with suppository and cream for €9.97 / $11.16 instead of €10.98 / $12.29 (a significantly lower cost compared to €15.97 / $17.86 for Canesten Gyn Once). Antifungol Hexal (Hexal / Novartis, clotrimazole) followed closely, advancing by 18%, owing probably to its low retail price of €9.94 ($11.13) for a combination pack of 20g cream and three suppositories.

Anti-itch: Growth falters

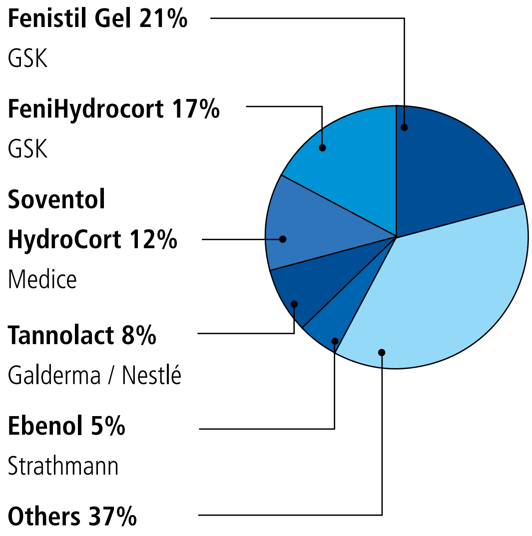
- Fenistil rebranded

Following a strong 2013/14, anti-itch remedies suffered a 7% decline over the reporting period, with Tannolact the only Top 5 brand to register growth. Antihistamines accounted for 55% of the category, with hydrocortisones contributing the remainder, although both segments fell. Fenistil dropped by 11% overall; in April 2015, Fenistil Hydrocort cream and spray was renamed FeniHydrocort (-9%), while dexpanthenol was added to the formulation. TV ads for FeniHydrocort featured a couple rolling around in a hay barn, while humorous ads on YouTube in Q3 2015 show consumers scratching themselves to the sound of animal noises, with the tagline reading, “Wenn’s mal wieder tierisch juckt: FeniHydrocort” (If the itching is beastly: FeniHydrocort).

Soventol dropped by 11% overall, despite the April 2015 introduction of a double-strength version of Cremogel (0.5% hydrocortisone) for skin irritation such as sunburn. Claimed to cool skin like a gel and heal like a cream, print ads supporting the launch read, “De Cremogel Erfolgsgeschichte geht weiter” (The Cremogel success story continues).

Tannolact antihistamine grew by 4%, with the creams and lotion strongly positioned for itching in infants, as well as nappy rash, so not competing directly with other entries here. Internet ads on parenting websites in Q3 2015 read, “Ruhe für den wunden Babypo” (Peace for the sore baby’s backside). Ebenol hydrocortisone declined by 12%, despite spring 2015 print ads backing the cream’s efficacy in relieving itching, redness and eczema. Positioned for insect bites, Autan (SC Johnson) advanced by double digits, owing possibly to widespread TV & print ads for its range of insect repellents.

Germany: Leading OTC anti-itch brands 2015*



*Total value: €39mn / $44mn

Haemorrhoid preparations: Impressive result for Faktu

- Posterisan struggles

Haemorrhoid preparations grew by 3%, driven by double-digit sales increases for Faktu (Dr Kade) and Hametum (Schwabe). The former’s advance may have cannibalised sales of stablemate and category leader Posterisan, which fell by 1% (including Posterine, witch hazel). Print ads for Posterisan Akut in H2 2014 claimed that it is the only haemorrhoid preparation using lidocaine, while also underlining its speed of action and strength.

Faktu (witch hazel) advanced by 11%, helped perhaps by TV ads in Q1 2015 featuring animated characters who struggle to stay sitting down owing to haemorrhoids. The brand’s 25g balm (see above) accounted for around 90% of sales, with the 10-count pack of suppositories contributing the remainder.

Schwabe’s witch hazel based Hametum managed 12% growth, backed by spring 2015 print ads displaying an iceberg, reading, “Haemorrhoiden-Eisberg. So navigieren Sie richtig!” (The haemorrhoid iceberg. This way you’ll get round it!). Stada’s Mastu (bismuth subgallate and titanium dioxide) fell by 4%.

Head lice treatments: Top 5 entries drive growth

- Öko-Test backs Nyda

Head lice treatments registered one of the outstanding performances in the derma market, managing 14% growth, driven by impressive sales increases for Top 5 entries Mosquito Läuse (Wepa) and Licener (Hennig). Following a strong 2013/14, leader Nyda (Pohl Boskamp) managed only 3% growth, but still captured just under a third of the topline. Print ads for the brand in Q3 2014 assured consumers that the dimethicone-based entry would relieve any panic they had from finding nits or lice. Nyda received a "very good" score from consumer watchdog Öko-Test in April 2015, based on its efficacy, formulation and the instructions for use.

Mosquito Läuse advanced by over 40%, boosted by the July 2014 addition of Läuse-Shampoo 10 options in 100ml and 200ml sizes with white oil, said to get to work within 10 minutes. The brand's performance could improve further following the summer 2015 introduction of Läuse-Dimeticon Haar Fluid (dimethicone and white oil), claimed to take effect within 15 minutes.

Infectopedicul (Infectopharm) fell by 6% in the competitive environment, while sales of summer 2014 launch Licener almost tripled. Autumn 2014 print ads for the brand carried the tagline, "Die Revolution gegen lästiges Krabbeln" (The revolution against annoying crawlies), while highlighting the shampoo's odour-free format, claiming it takes 10 minutes to start taking effect.

Jacutin (Almirall) grew by 4%, receiving a high score in Öko-Test's survey, again based on efficacy. Following a decision by the Joint Federal Committee (G-BA) and Federal Social Court in May 2015, the dimethicone-based product is to be dereimbursed, as the G-BA ruled that there are more effective options available to consumers. An exact date for dereimbursement was not given.

Italy

Circulatory aids: Diosmin SOPs still going strong

- Venoruton shared among friends

Circulatory aids grew by low single digits, with strong performances from SOP-registered leaders Daflon (Servier) and Arvenum (Stroder) partially offset by the decline of several pure OTCs in the Top 10. Daflon (diosmin and hesperidin) advanced by double digits, boosted by sales of the 60-tab pack, launched in October 2013 to sit alongside the 30-count size. Arvenum (diosmin and hesperidin) recorded a similar performance.

Pure OTC Venoruton (GSK) managed above-average growth, boosted perhaps by summer 2014 TV ads featuring a woman recommending the product to her friend who feels uncomfortable walking owing to heavy legs. The oxerutin-based brand is available as 500mg tablets, 1,000mg granule sachets and 2% gel. Hirudoid (Crinos / Stada) grew at the category average, while BI's Antistax declined, despite TV ads throughout the reporting period featuring a woman who cannot shake an animated octopus clinging to her legs. Antistax retails at a premium price, higher than rivals such as Venoruton.

Registered as a dietary supplement, Flebinec (AlfaSigma, diosmin, troxerutin, l-carnitine and hesperidin) fell slightly, while Sanofi's Essaven gel grew by single digits. Formulated with aescin and phosphatidylcholine, the latter was supported by TV ads throughout the reporting period highlighting its ability to relieve tired legs. Outside the leading entries (although advancing strongly) is Pool Pharma's Destasi Ven, which was extended in September 2014 through a gel format – Destasi Gambe – claimed not only to boost circulation but to be the only blemish balm for legs. The 75g gel uses hyaluronic acid and

Destasi Gambe Emulgel

echinacea, as well as horse chestnut and mint. TV ads for Destasi spray and tablet formats in spring 2015 backed their ability to protect vein walls through their diosmin and vine leaf formulations.

Antifungals: Healthy VYI and nail segments drive sales

- Impressive turnover for Onilaq

Antifungals advanced by high single digits, driven mainly by healthy growth for VYI and nail antifungal segments. Among general and nail antifungals, Canesten (Bayer) managed a double-digit sales increase, with the brand's Canespro version for nail fungus enjoying print ad support in summer 2014, highlighting speed of action. Canesten's line-up also features cream, powder and spray formats (all clotrimazole 1%) for general skin infections, as well as Canesten Unidie cream (bifonazole), which is more strongly positioned for athlete's foot.

Giuliani's Trosyd grew by single digits, backed by TV ads throughout the reporting period for the nail fungus lacquer (tioconazole 28%) carrying the tagline, "E l'unghia rinasce sana" (And the nail grows healthily again). Print ads in H2 2014 highlighted the range's other options for general skin infections and athlete's foot. Onilaq (Galderma / Nestlé, amorolfine 5%; known as Loceryl elsewhere) advanced by high double digits, boosted perhaps by H1 2015 TV ads underlining its ability to remove nail fungus with just one application a week.

J&J's SOP-registered Pevaryl for general skin infections (econazole) registered single-digit growth, although it was outperformed by stablemate Daktarin, which is registered OTC and formulated with miconazole for nail and general skin infections. Following at a distance, Niogermox (Isdin for Polichem, ciclopirox) for nail fungus advanced by double digits, driven by strong turnover for the 3.3ml lacquer, which joined the 6.6ml size in March 2013. The brand enjoyed print ad support in Q3 2014 asking, "Unghie fragili e scolorite?" (Fragile and discoloured nails?).

VYI antifungals advanced by double digits, led by Gyno-Canesten (Bayer) which managed above-average growth. TV ads in spring 2015 claimed the brand's clotrimazole cream can relieve thrush within 3 days. The ads also highlighted the launch of Gyno-Canesflor probiotic capsules for rebalancing intestinal flora (lactobacillus plantarum, tracked under feminine intimate care). SOP-registered Meclon (AlfaSigma) grew by high single digits, following on from the switch of three clotrimazole and metronidazole-based options in 2012.

Anti-itch: Return to growth for Reactifargan

- Foille Sole recalled

Anti-itch remedies registered flat sales over the reporting period, with significant gains by Top 5 entries Reactifargan (J&J) and Fenistil (GSK) offset lower down the rankings. Sanofi's Foille led the way, capturing around a quarter of the topline despite a slight decline in sales. The line-up includes an antihistamine gel (Antistaminico), a hydrocortisone cream for insect bites (Insetti), a benzocaine cream for burns (Scottature) and a separate cream and spray positioned for sunburn (Sole). In August 2015, Sanofi recalled seven batches of Sole cream for precautionary monitoring measures.

Following a difficult 2013/14, Reactifargan marked a strong return to growth, advancing by double digits. Cartoon print ads in summer 2014 featured a man and a mosquito watching TV together, reading, "Punture d'insetto? Reactifargan. Per non passare l'estate" (Insect bite? Reactifargan. So you don't miss the summer). The promethazine-based cream may also have benefited from pharmacy websites urging Italians to take the product along on their summer holidays in 2014. Fenistil (GSK, dimethindene maleate) also managed double-digit growth, backed by summer 2015 TV ads and internet banners highlighting the gel's positioning for insect bites.

Haemorrhoid preparations: Lack of dynamism

- New niche area for Preparazione H

Haemorrhoid preparations registered single-digit growth, with all Top 5 entries managing modest advances. There is very little advertising, while the topline may be being held back by the wide variety of natural home-made remedies suggested on blogs.

Recordati's Proctolyn led the way, recording above-average growth. The leader's line-up features cream and suppository formats, both registered OTC and formulated with fluocinolone and ketocaine, as well as Proctolyn Integra Plus supplement (diosmin and rutin), available as granule sachets. Bayer's Proctosedyl managed an average sales increase, while Preparazione H (Pfizer) only managed a modest advance. The latter's balm formats continue to be used by female consumers as an anti-wrinkle cream, while others are recommending it as an anti-cellulite product.

Head lice treatments: Dimethicone entries on the rise

- Mums acknowledge Hedrin

Head lice treatments grew by mid-single digits. A February 2015 report by press agency *Adnkronos Salute* estimated that over 1mn Italian infants and children are affected by nits every year. Aftir (Rottapharm | Madaus / Meda) led the way, advancing by single digits. Despite relatively little advertising support over the reporting period, trade press ads for the PreAftir lotion spray in August 2015 highlighted its ability to create a hostile environment for nits and lice. The ads also offered free LED magnifying glasses to pharmacies willing to take on bulk supplies of the product in time for the new school term in autumn 2015. Formulated with thyme, rosemary and lavender, PreAftir is also available as a shampoo, while the standard Aftir option offers malathion-based gel or shampoo.

Paranix (Omega Pharma / Perrigo, dimethicone) followed, managing a slightly better performance, with the marketer running an educational campaign for schools to download for young children, marketed under the theme of "Prince Paranix and The Invasion of the Nits". The line-up includes a number of shampoo + comb packs, as well as a Prevent spray.

Hedrin (Allergan for Thornton & Ross / Stada) managed above-average growth. The brand was given an award by Fattore Mamma mothers' association in May 2015 after 95% of members said they would recommend it (94% stated they would buy it again). The line-up also features a fast-action spray and gel (Rapido).

Poland

Circulatory aids: Aflofarm and Valeant lead

- Rostil now available OTC

The topline expanded by 5%, boosted by double-digit growth for No.3 brand Cyclo 3 Fort (Pierre Fabre, butcher's broom, hesperidin and vitamin C). Diosmin brands Diohespan Max (Aflofarm) and Diosminex (Valeant) continued to lead the rankings. Diohespan Max (diosmin 1,000mg; +7%) garners around a fifth of category sales and was supported by TV ads in H1 2015 targeting both men and women with the statement:, "Maksymalna ulga dla nóg" (Maximum relief for your legs).

Aflofarm also fields lower-tier brands Regu-therm, RedBlocker and Vitaleg (all available as systemic and topical options). RedBlocker has cosmetic positioning and is claimed to reduce skin redness and strengthen capillaries, while Regu-therm was boosted by TV ads stating: "Zimne stopy i dlonie. Regu-therm zadba o nie" (Cold hands and feet. Regu-therm will take care of them).

In March 2015, Aflofarm launched Vedimasan gel, a cosmetic positioned to relieve tired and heavy legs via a formula including butcher's broom, goldenrod and horse chestnut (it comes with a massage applicator tip to stimulate blood flow).

In January 2015, the Office for Registration of Medicinal Products, Medical Devices & Biocidal Products approved the Rx-to-OTC switch of Aflofarm's Rostil (calcium dobesilate 250mg, previously marketed as Calcium Dobesilate Aflofarm). TV & print ads showed a woman having an ultrasound scan of her legs, before the doctor tells her that she does not require a prescription, but Rostil instead. However, the Main Pharmaceutical Inspectorate ruled in May that this violated advertising rules in a number of ways, including making claims not in line with approved indications.

No.2 option Diosminex was supported by humorous TV ads in summer 2015, which showed women trying to relieve heavy legs by cooling the skin with frozen food and performing a headstand. Lioton 1,000 (Berlin-Chemie / Menarini, heparin sodium) and DIH (Hasco-Lek, diosmin) rounded out the Top 5. The former was seen in summer 2015 print ads and advertorials, with promotion claiming that it is the No.1 gel in Poland for varicose veins and heavy legs. A competition in May 2015 offered consumers the chance to win a bicycle, with the marketer stressing the importance of staying active.

The comprehensive DIH range includes OTC-registered tablets as well as cosmetic spray and gels. Print ads in September 2014 stressed efficacy against swelling, varicose veins and leg pain and highlighted its low price. In September 2014, Hasco-Lek stated that more than half of Poles suffer from chronic venous insufficiency, but that most do not know how to treat and prevent it. The marketer frequently invests in educational campaigns to raise awareness. In July 2015, Hasco-Lek's Fortiven Activ Gel (heparin sodium, 30g) was granted marketing authorisation, although this has yet to launch.

Antifungals: Hascofungin dynamic following switch

- Undofen Max advertising under fire

Sales of antifungals increased by 3%, with double-digit growth for nail treatments (around 25% of category sales) offset by a stagnant performance from general antifungals. Among the latter segment, the rankings are fragmented, with low-cost generics competing with long-line brands for share. GSK's clotrimazole generic leads by a small margin, although sales fell by 8%, perhaps owing to double-digit growth for lower-priced clotrimazole rivals from Aflofarm and Hasco-Lek in the mid-tier. Meanwhile, sales of Hascofungin (Hasco-Lek, ciclopirox olamine 10mg / ml) close to tripled in the reporting period, following its switch from Rx to OTC status in January 2014. Ziaja's terbinafine generic also recorded strong growth from a modest base and now claims the No.5 spot.

Omega Pharma / Perrigo's Undofen Max (terbinafine) is the leading branded option in the category and sales advanced strongly. Available in cream and spray formats, the marketer invests in frequent TV & print ad support. However, the Advertising Ethics Committee ruled in March 2015 that claims in a TV campaign relating to anti-inflammatory and antibacterial efficacy were not supported by scientific evidence.

Daktarin (J&J, miconazole nitrate) and Acifungin (Unia, boric acid, methyl salicylate and salicylic acid) compete closely for the No.3 spot, and the latter was the better performer in the reporting period, boosted by a lower retail price. A 30g bottle of Acifungin Forte costs around PZL9.93 (€2.34 / $2.63) vs PZL14.08 (€3.32 / $3.72) for Daktarin 2% 30g.

Among fungal nail treatments, RB's Scholl Preparat na grzybice paznokci garners around 50% of the segment topline, although sales fell by mid-single digits. Brand promotion has focused on Velvet Smooth foot file.

Nailner (Vitamed for Trimb Healthcare) was the star performer, with sales more than doubling (see box on p314 for more info).

Sales of Undofen fungal nail treatments grew strongly to make up 15% of total segment sales. The line-up includes Undofen Nailexpert and Lakier + Akcesoria, with the latter launched in H1 2015. This comprises lacquer (5ml), disinfectant wipes (20-count) and disposable nail files (30-count) and is said to deliver visible results in 4 weeks. Sales of Undofen Nailexpert more than quadrupled in value terms in the reporting period.

Anti-itch: Parallel imports impact Fenistil

- Consumers choosing lower-price options

The anti-itch topline increased by 3%, with declines for leading options offset by positive performances in the lower tier. GSK leads via Fenistil (previously Novartis), which garners around a third of total category sales. Brand sales fell by 13% however, with little A+P investment, while parallel import versions provided stiff competition.

Sales of Aflofarm's hydrocortisone generic (8% category share) fell by 17% (-13% volume), with strong double-digit growth for Oceanic's hydrocortisone generic hitting sales. A 15g tube of the latter costs around PZL4.97 (€1.17 / $1.31), while Aflofarm's generic in the same size costs around PZL6.66 (€1.57 / $1.76).

No.3 option Pudroderm (Pampa, benzocaine, levomenthol and zinc oxide) fell by 14%, while the star performance in the category came from lower-tier Variderm paste (Profarm, benzocaine, menthol and zinc oxide). This is indicated to relieve itching associated with chicken pox, shingles and sunburn.

Sales of eczema & psoriasis treatments (not included in our topline) were modest and increased by just 1%, although NPD and A+P support for cosmetic brands may boost the topline. In October 2014, IBSS Biomed extended Latopic systemic probiotic brand with topical options to relieve atopic skin: Emulsja do ciale (body emulsion, 200ml), Krem do twarzy i ciale (Face and body cream, 75ml) and Emulsja do kapieli (bath emulsion, 200ml). These are said to soothe itching and regenerate skin and can be used from birth, while the marketer claims they are the only products on the market containing lactobacillus metabolites, which have an antimicrobial function and prohibit the growth of staphylococcus aureus bacteria.

Nepentes / Sanofi extended long-line range Emolium in September 2015 with Lagodna emulsja micelarna (Mild micellar emulsion), which is designed for the daily hygiene of sensitive, irritated and allergy-prone skin and contains grape oil, panthenol, algae extract, allantoin and urea. A 250ml bottle costs around PZL32 (€7.56 / $8.46). In February 2015, the marketer launched an online microsite on wizaz.pl which invited consumers to share experiences and find expert information on skin care.

Elsewhere, Bioderma ran an online ad campaign for Atoderm in Q2 2015 which carried the tagline, "Atoderm – wiecej niz emiolient" (Atoderm – more than an emollient). The campaign targeted mothers with young children and invited consumers to visit new brand website wiecejnizemolient.pl.

Haemorrhoid preparations: Ruskorex offers discreet advice

- Procto-Hemolan does well

The topline increased by 9% in the reporting period, driven by the dynamic performance of Aflofarm's Procto-Hemolan (+29%), which generates over a quarter of category sales. There was double-digit growth for core, Protect and Control options, while August 2014 launch Procto-Hemolan Comfort now accounts for 3% of brand sales. Frequent TV ads support the brand, often targeting women and highlighting that relief from haemorrhoids allows you to get on with life.

Recordati's Procto-Glyvenol (+1% value, +7% volume) claimed the No.2 spot, while Posterisan (Dr Kade, -3%

value, -2% volume) rounded out the Top 3. The former brand was likely impacted by parallel import versions, which grew by double digits in volume terms.

Miralex's Proktis-M grew at the category average in the mid-tier (+14% volume), while stablemate ProctoLact was promoted via print ads in autumn 2015 – targeting men – stressing efficacy against rectal and anal inflammation and fissures. This differs from many haemorrhoid preparations as it is available in powder sachets for oral solution and combines lactobacillus rhamnosus PL1 and inulin.

Elsewhere, Angelini's Ruskorex (ruscogenins and tetracaine hydrochloride, 4% category share), registered a 35% increase (+38% volume). The brand was boosted by print ads in March 2015 inviting consumers to call a free helpline for discreet advice from a proctologist – operating until 31 May 2015.

Head lice treatments: Marketers provide education

- Dynamic category

This was among the best performing categories, with the modest topline increasing by 27%. Leading options include Sora (Scan Anida), Paranit (Omega Pharma / Perrigo), Hedrin (Solpharm for Thornton & Ross / Stada) and Nyda (SiroScan for Pohl Boskamp), all of which recorded double-digit advances. There was little traditional A+P support, although marketers continued to invest in educational materials for schools and parents.

Sora was seen in print advertorials at the back-to-school period stressing the efficacy of the dimethicone liquid, permethrin shampoo and repellent spray. ICB Pharma's Pipi Nitolic has grown strongly from a modest base, with the marketer investing in significant NPD. The line now includes a medical device preventive spray (50ml).

Russia

Circulatory Aids: A+P drives growth

- La vie en rose for Detralex

The topline advanced by 19%, with frontrunner Detralex (Servier) increasing by 14% in value terms (+4% volume). The brand featured in a series of TV & print ads in spring 2015 that promote its French heritage: "French relief for your legs". Detralex is also mentioned prolifically in press articles and online reviews, although – in a trend encompassing Russian OTC pharmaceuticals as a whole – consumers often mention its premium retail price.

Troxevasin (Allergan; +20% value, -4% volume) – available in capsule and gel formats – claimed the No.2 position, boosted by A+P support for Troxevasin Neo. However, despite advertorials, positive reviews and magazine features – including one in *Time Out* Moscow celebrating the product as an anti-cellulite tool – Troxevasin was unable to keep up with Detralex.

While Phlebodia 600 (Innothera) enjoyed value-driven double-digit growth, Lioton 1,000 (Berlin-Chemie / Menarini) advanced only modestly in revenue terms (+1% value, -16% volume); a summer 2014 TV ad campaign featured a woman with chains around her legs and the tagline: "For the health and beauty of your legs." Completing the top 5, Venarus (Obolensky) advanced by double digits, benefiting from substantial advertising from end-2014 to the time of writing. It also won a No.1 brand award owing to its high level of consumer awareness.

Indovasin (Allergan) recorded 35% growth, although this was led entirely by price rises, while Capilar (Diod), derived from larch bark, registered only a modest inflationary increase.

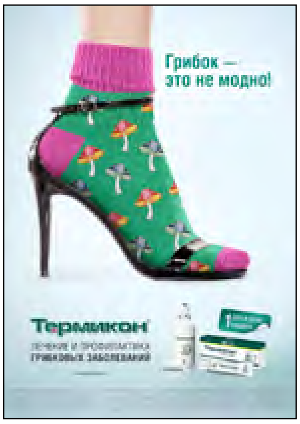
Pharmstandard's ascorutin generic grew by 83% (+17% volume); although its retail price has risen, it remains modest at around Rb50 (€0.66 / $0.74) for 50 tablets. Vertex extended Normaven in late 2014, adding a tonic spray (horse chestnut, witch hazel, butcher's broom, menthol and panthenol), designed to relieve swollen and heavy legs. It was already available as a cream.

Antifungals: Modest growth

- **General antifungals enjoy TV spotlight**

General antifungals grew only modestly (+1%), with market leader Exoderil (Sandoz / Novartis; naftifine) – the main growth driver over the past few years – performing poorly (-1% value, -15% volume). The brand, claimed to work on various foot infections but positioned heavily for nail fungus, has been advertised on TV, including a well-known spot featuring humans with toenails in place of heads.

Sales of terbinafine brand Lamisil Uno (GSK) increased substantially, aided by a spring 2015 TV advertising campaign and claims that it can treat athlete's foot in just one application. However, core and Dermgel stablemates continued to decline.



In the No.3 spot, Termicon (OTCPharm / Pharmstandard; terbinafine) advanced by double digits in revenue terms, although volumes were flat. In November 2014, the brand's packaging was revamped, with a more compact plastic bottle and efficient spray nozzle design to ease application. Advertorials and outdoor posters for the brand have featured sock-wearing feet in sandals, accompanied by the tagline: "Fungus – it's not fashionable" (see above). OTCPharm launched Mycoderil in July 2015, a naftifine brand positioned mainly as a nail antifungal, claimed to be the only such product in Russia available as drops.

Candid (Glenmark; clotrimazole) declined by 15%. The brand – part of a wider range that includes Candid B, Candiderm and Candid B6 – was supported by a TV ad campaign in summer 2015, set in a laboratory where a man explains how foot fungus can be spread.

VYI treatments registered a flat result, although volumes fell. Flucostat (OTCPharm / Pharmstandard; fluconazole; +2% value, -10% volume), was backed by a new TV ad campaign in mid-2015 carrying the tagline: "Flucostat – no trace of thrush."

There has been some consumer comment online regarding the price of Diflucan (Pfizer; fluconazole), with a single-count SKU (150mg) costing more than Rb400 (€5.32 / $5.96). Pfizer also introduced Combe's Vagisil feminine intimate line (not tracked here) at the end of 2014, positioned as a complementary treatment to Diflucan, with the two advertised jointly in TV ads and at dedicated website intimatecare.ru.

Elsewhere, Pimafucin (Astellas; natamycin) remained one of the best performers, growing by 3% in volume terms (value +6%). Livarol (Stada CIS; ketoconazole) also grew by 6% in revenue terms, however this masked a similar drop in units. A summer 2015 digital video for the brand featured a girl who wants to daydream about the boy she is about to meet up with, but instead can only think about thrush. The tagline reads: "All plans will materialise. Forget about thrush."

The nail antifungal category grew by 5%, with Loceryl (Galderma / Nestlé; +6% value, +1% volume; amorolfine) among the leaders. The brand benefited from A+P support in 2014-2015 which features the tagline: "Wipes out fungus and restores nail health!"

Anti-itch: Topline advances

- **Bayer holds onto the lead**

The topline expanded by 14%, with Triderm (Bayer; clotrimazole, betamethasone and gentamicin) – acquired alongside Merck Consumer Care in 2014 – maintaining its lead (+34% value, +18% volume) against main rival Fenistil (GSK; dimethindine). Spring TV ads for Triderm featured the tagline: "Confidence you feel with your skin". Fenistil grew by only 3% (-8% volume), despite ad campaigns throughout summer 2014-2015. Belosalic (Belupo; salicylic acid and betamethasone) grew by 21% (-2% volume).

Akrikhin / Polpharma's Akriderm (betamethasone), Akriderm GK (clotrimazole, betamethasone and gentamicin) and Akriderm SK (salicylic acid and betamethasone) all registered double-digit growth, with Akriderm GK maintaining its Top 5 position (+31% value, +3% volume). Many consumers have been recommending the product online owing to its relatively low retail price, with a 15g cream tube priced at around Rb150 (€1.99 / $2.23) less than some rivals.

Others: Hollywood stars boost haemorrhoid preparations

- Growth for head lice treatments

Haemorrhoid preparations reported double-digit growth, with the category receiving unexpected endorsements – *Cosmopolitan* featured articles about unofficial cosmetic benefits, and quoted actress Sandra Bullock saying she uses haemorrhoid treatments for wrinkles around the eyes. Relief (Bayer) dominated (+13% value, -3% volume), although some users reported the product's "fishy" scent, while sister products Relief Advance (ointment and rectal suppositories) and Relief Ultra (rectal suppositories) grew by 20% and 19% respectively. Meanwhile, Natalsid (Nizhpharm / Stada CIS; +34% value, +6% volume) was praised by consumers for its potential for use during pregnancy. Proctosedyl (Sanofi) grew by 1%, although this masked a decline of 19% in volume terms, while Proctosan (Stada CIS) and Hepathrombin H (Hemopharm / Stada CIS) rounded out the Top 5, growing by 27% and 37% respectively (volume growth for both was in the single digits).

Procto-Glyvenol (Recordati), whose slogan reads: "Life without haemorrhoids," inspires a popular yearly competition for the best ditty about the condition, and the brand grew by 16% (+2% volume).

Posterisan (Dr Kade) experienced growth of 51%, although this was owing to rising prices (-4% volume). Low-tier brand Proctonis (Ria Panda) declined by 11% (-28% volume); the Federal Antimonopoly Service ruled in November 2014 that the company had made unpermitted curative claims in advertising for the capsules and cream, neither of which is registered as a medicine.

The topline for head lice treatments grew by 8%, with Paranit (Omega Pharma / Perrigo) – described on its website as the "No.1 head lice brand in Europe" – and sister-brand Para Plus dominating the category. Online banner ads supported the latter in August 2015, with the tagline: "Para Plus will protect you from lice and nits."

Spain

Circulatory aids: Thrombocid on top

- Martiderm promotes Legvass

The category grew by 5%. Dominant brand Thrombocid (Lacer) performed just below this average; A+P activity focuses on the dual positioning of the Forte version, with one TV ad featuring a female shop assistant dancing with customers to promote use for improving circulation, while another features a man using it to prevent bruising after a minor fall.

FisioVen (Aboca) challenges second-placed Fito Cold Gel Frío (Sawes) after almost 30% growth. FisioVen is positioned as 100% natural, formulated with ingredients such as rusco root extract and red vine leaves, available as capsules and biogel. Hirudoid (Stada) and Boiron's Arnica also performed well, with the latter receiving positive reviews on YouTube from homeopathy

enthusiasts.
Trade press advertising for Legvass (Martiderm) was prominent in the summer months, when consumers are more likely to experience heavy legs. The line features patch, capsule and emulsion formats formulated with natural ingredients.

Antifungals: Canespie and Nailner key growth brands

- October brings healthy foot campaign week

With the modest antifungals category posting only slight growth, Bayer's Canespie Bifonazol (formerly Canesderm Pie) was the star performer following a double-digit advance. The athlete's foot brand was already available in a clotrimazole version. Category leader Funsol, also Bayer, a parapharmacy brand available as spray and powder to prevent infection, recorded a flat result. Among nail fungal treatments, Nailner (Trimb Healthcare) was especially noticeable, aided by ads highlighting the easy application of the spray format (for more info see box on p314).

The General Council Association of Podiatrists, in association with a number of footcare companies, held Semana del Pie Saludable (Healthy Foot Week) in Spain during October 2015, an initiative that aims to educate the general public on the importance of healthy feet, and the benefits that this care can provide. The campaign reached 5,000 pharmacies across the country and includes piesaludable.com website, which provides details about maintaining foot and nail health.

Anti-itch: Neosayomol drives sales

- Mixed results

The rankings are fragmented among anti-itch remedies in Spain, with several brands competing near the top on modest revenues. Neosayomol (Cinfa) stood out following double-digit growth; the sting and allergy brand, suitable for consumers aged 6+ years, has received positive reviews on consumer blogs. Leading brands After Bite (Pensa / Esteve for Tender) and Fenistil (GSK) both declined in the reporting period.
Martiderm has launched a new format of Medusicalm, a powder positioned to relieve jellyfish stings (previously available as a 15g SKU balm). The new sachet format includes gloves for safe application and emphasises its natural formulation as well as its effectiveness for stings in babies and young children.

Haemorrhoid preparations: Mid-tier success

- Anso continues to lead growth

Hemoal (RB) grew by 3% and continues to hold a 40% share of the topline, with ads showing a man able to return to cycling after relieving his discomfort with Hemoal. The ad also highlights the brand's status as the leader in the category, and its effectiveness at relieving pain, itching and stinging. Hemoallitas wipes are also available, although these declined by single digits.

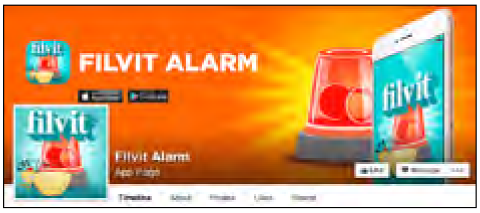
The main category growth drivers were second-ranked Anso (Lacer, pentosan polysulfate sodium, triamcinolone and lidocaine) and mid-tier entries Fitoroid (Aboca) and HemoClin (Trimb Healthcare). Anso now accounts for almost 20% of the topline; it is available as cream and wipes (10 and 50-count). Ads in 2014-15 feature a woman floating through a city with a rubber ring for a cushion.

Head lice treatments: Strong growth

- Uriach launches mobile app Filvit Alarm

Head lice treatments advanced by close to 5%, with positive growth throughout the Top 10. Neositrin (Sanofi for Thornton & Ross / Stada) continued to grow well and challenges for the lead. Future performance may be boosted by the rollout of Neositrin Protect in Q3 2015, positioned as a spray conditioner to help protect against infestations (Activdiol 1%).

The other leading brands, Permetrina OTC (Ferrer) and Filvit (Uriach Aquilea) recorded more modest results.



Filvit Alarm has been promoted on Facebook

A mobile app called Filvit Alarm was released in August 2015 for iOS and Android, with the aim of allowing parents to be alerted to lice outbreaks in schools. Using the app, parents can indicate if their child has lice, which other parents in the school can view. The app also allows consumers to search for the nearest pharmacies in order to buy Filvit products as well as informing users of new product releases.

Also in August 2015, Isdin / Esteve extended its Anti Piojos range with a preventive head-lice spray repellent. This was supported by print advertising alongside the tagline "¡Quítatelos de la cabeza de una vez!" (Get them out of your head once and for all!).

UK

Antifungals: Redesign for Canesten range

• Nailner stars among nail fungal treatments

Antifungals grew by 5%, with VYI treatments (50% category share) advancing at this rate. Canesten (Bayer) is the only major brand and grew just ahead of the average performance, helped by its availability in a range of treatment options, including pessary, cream and oral capsules (sold individually as well as in "combi" and "duo" SKUs). Bayer's NPD focus has been on the creation of a wider feminine intimate care sub-line under the "Canes" banner, such as Canesfresh, Canesbalance and Canestest, (see Feminine intimate care *Market Report*, *IE* September 2015 p307 for more info). The wider positioning of the Canesten umbrella has led Bayer to redesign the brand website, with information and product listing split by indication (e.g. thrush, cystitis, etc).

General antifungals – mainly athlete's foot treatments – performed best, with sales up by 7% (34% category share). There is relatively little A+P in support of athlete's foot treatments, with well-established leaders Daktarin (J&J) and Scholl (RB) reliant upon a dominant on-shelf presence and pharmacist recommendations. Private labels are a key factor in this segment also, garnering a 15% share, with most large retailers offering terbinafine generics for athlete's foot.

Combined sales of the Daktarin range – including P-only Oral Gel (miconazole; for bacterial infections of mouth & throat) and Daktacort (hydrocortisone and miconazole; for added itch / inflammation relief from athlete's foot and other skin infections) grew by 7% and accounted for almost 40% of segment sales. The majority of revenue is generated by mass market spray powder and cream versions (both miconazole) under the Activ banner.

Scholl (RB) continued to grow strongly as distribution of its athlete's foot treatments returned to normal following licensing issues that affected distribution of a number of former SSL brands over the past few years. The wider Scholl range is advertised heavily, although the main focus is on cosmetic product options associated with appearance (primarily aimed at women).

Following strong growth over several years amid a flurry of NPD, nail fungal treatments are now declining, with few brands able to maintain sales levels. However, the majority of leading brands continue to be backed by A+P support, which looks to educate consumers about the condition and to take action.

Scholl Fungal Nail Treatment (28% segment share) is promoted on the brand website as the UK's "No.1 fungal nail product", while TV & press ads tell consumers that discoloured nails are likely to be a sign of infection and should not be ignored. Galderma's Curanail (22% share) has been rebranded under the Loceryl banner, and was joined in autumn 2014 with a nail gel version, which does not fight fungus but is claimed to improve the appearance and growth of healthy nails. TV ads for the antifungal treatment advised consumers of the updated name in mid-2015, while press ads have supported use of the nail gel for both fingers and toes, with the latter saying "Quickly recover healthy looking nails".

Excilor (Vemedia) is the only other brand to account for a double-digit category share (13%). TV ads in the reporting period claimed that its TransActive technology allows deep penetration without the need for filing, while internet banners advise consumers to "Be smart, act now!".

The best performer was Nailner (Trimb Healthcare), which has benefited from the launch of a 2in1 brush treatment and effective advertising claims (see box on p314).

Anti-itch: After Bite gets Xtra

- Eczema brands receive consumer focus

The modest anti-itch topline, made up of bite & sting treatments plus products for general itching / dermatitis, was largely flat in the reporting period. PLs account for the majority of the topline (approaching a 20% share). Following a strong result in the previous reporting period, sales of Anthisan (Sanofi) declined. The brand continued to be supported by online ads advising consumers to always carry the product at home or abroad in case of insect bites. Further down the rankings, After Bite (Ardern Healthcare for Tender Corp) was extended with a 20g Xtra gel version, with the core product (14g pen applicator) rebranded as Classic.

There are a large number of products positioned specifically for eczema & psoriasis in the UK, which are tracked separately from anti-itch in ***DB6***, and these garnered sales of £98mn (€134mn / $150mn), growing by 4%. Many of these entries rely heavily on doctor prescribing or pharmacist recommendations, and are available from pharmacies only. However, there has been a noticeable increase in consumer advertising here, as marketers attempt to appeal to more consumers amid a rise in the instance of allergic skin conditions and eczema.

A number of brands compete at the top of the rankings, the majority of which offer a range of treatment options including bath / shower washes and hand / body creams for daily treatment of dry skin and itching, including Dermol (Dermal Labs / Diomed Developments), Oilatum (GSK), E45 (RB), Diprobase (Bayer), Aveeno (J&J) and Cetraben (Thornton & Ross / Stada). Oilatum has one of the highest consumer profiles, and is strongly positioned as a paediatric (mainly bath-time) treatment. A+P in the reporting period included TV ads featuring the tagline "Take comfort in our science", while the brand has also featured as sponsor of weather bulletins on ITV's Good Morning Britain programme. E45 is also backed by consumer-oriented advertising, with TV campaigns highlighting that it is clinically-proven to treat and soothe a variety of skin conditions, including eczema, dry psoriasis and itching, for the entire family.

The Cetraben range has been given a wider consumer profile over the past year, with the launch of a dedicated YouTube channel featuring informative videos by brand spokesperson Dr Pixie McKenna, while TV star Claire Sweeney shares her experience of eczema in a video on the brand website. A TV campaign introduced the brand to consumers, claiming that over 10mn packs have been sold to those looking to "restore and repair eczema prone skin". A key feature of the range is its availability in handy-sized 50ml SKUs.

Dermalex (Omega Pharma / Perrigo), which is available in eczema, psoriasis and rosacea lines, was rolled out in independent pharmacies in spring 2015 (it already had

Cetraben's profile has been raised in 2015

a strong presence in Boots). A YouTube channel and the brand website provides testimonials from consumers detailing how the brand has helped improve their lifestyles. Marketing emphasises that Dermalex is free from steroids, parabens and fragrance.

Haemorrhoid preparations: Soothing Relief adds value

- Revenue growth outpaces volume

Haemorrhoid preparations grew by 3%, driven by dominant leader Anusol (J&J), which advanced by 9%. However, this advance was largely owing to consumers trading up to the more expensive Soothing Relief line of ointment and suppositories, which rolled out in spring 2014 (volumes were steady). These are claimed to have a 4-way action, adding anti-inflammation properties owing to its formulation with hydrocortisone (core Anusol is said to have a 3-way action – shrinking haemorrhoids, relieving pain and soothing itching – and is formulated with zinc oxide and bismuth subgallate). Its main rival Germoloids (Bayer), which generated around a quarter of topline sales, recorded a flat result.

NPD in 2015 included HemorRite (Appia Healthcare), a cryogenic treatment to soothe both internal and external haemorrhoids. The medical device is to be placed in a freezer for 2 hours and can provide multiple symptom relief after an 8-minute application (can be re-used for 6 months). Promotion on hemorrite.co.uk positions it as safe for pregnant women as it has no side-effects, and also suggests that use "may prevent surgery".

Head lice treatments: Lyclear extended

- Vamousse makes its mark

This category maintained its healthy growth rate (+7%). The result was largely owing to the introduction of Vamousse (Ceuta Healthcare for TyraTech) in summer 2014 and the return to distribution for Derbac M (acquired by Lanes Health from RB in early 2015). Hedrin (Thornton & Ross / Stada) – the leading brand – recorded a flat result, while main challenger Lyclear (Omega Pharma / Perrigo) advanced by just 2%. It remains to be seen if this slowdown continues in future years as the category matures.

Hedrin accounted for 35% of the topline, and TV & trade ads regularly highlight that it is the "No.1 selling range". Brand development has slowed in recent years, with the line already containing various formats as well as Protect & Go preventive option. Hedrin Once, formulated with Penetrol and claimed to be effective after just one 15-minute application, is the leading brand version in sales terms.

While Lyclear's growth slowed in the reporting period, NPD in 2015 may aid its future performance, with both Treatment lotion and Repellent rolled out. A £1mn (€1.3mn / $1.5mn) TV campaign launched in time for the back-to-school season in 2015 featured Lyclear Treatment spray – claimed, like all brand treatment versions, to be 100% effective in one application – and also the Repellent, which is recommended for use when there is a lice breakout at school to protect children and the rest of the family. A trade feature in September 2015 claimed that the Lyclear range "meets more customer needs than Hedrin, Full Marks or Vamousse," adding that the brand also enjoys higher TV investment than rivals.

Full Marks (RB) grew slightly and occupies 3rd place in the rankings. TV ads in 2015 backed the claim also seen on packaging that the solution offers a 10-minute treatment. The main mover was Vamousse, which claimed a 4% share after less than a year on the market (available as a mousse treatment and a prevention shampoo). As well as the launch TV campaign, a brand Facebook page features positive reviews and tips & advice from mothers who have used Vamousse products on their children. A+P also promotes the brand gaming app, which is designed to keep children entertained while being treated for lice. While Derbac M grew strongly, sales revenue remained modest (2% category share).

Spotlight on cough & cold: Marketers prepare for winter season

There has been a significant burst of activity from marketers as they prepare for the crucial winter sales season. Here, we review some of the key cough & cold launch and A+P developments from across Europe.

Systemic cold & flu: Leading antivirals promoted in Russia

In **Russia**, Nearmedic has teamed up with TV channels to promote its **Kagocel** antiviral. The Second Screen app from CTC, which allows consumers to watch TV on their phone in real-time, will feature branded content about Kagocel synced with programmes, for example, providing information about boosting immunity whenever a plot features cold weather. Meanwhile, the brand will sponsor weather bulletins on the TNT channel. Elsewhere, OTCPharm / Pharmstandard's **Arbidol** has been extended with a paediatric powder version, which is to be mixed with water in order to create a suspension with a fruity taste. A new A+P campaign features children dressed as superheroes, promoting the fact that core Arbidol tablets can be taken by children aged 3+ years (December 2014 launch Arbidol Maximum is the version now promoted for adults). The ads feature the slogan: "Start trembling, viruses, colds and flu" (see above).

In the **UK**, a TV and online campaign for RB's new **Nurofen Sinus** range – Nurofen Sinus & Blocked Nose and Nurofen Sinus Pain Relief (both ibuprofen 200mg and phenylephrine 5mg) – shows a woman with water slowly rising around her head to simulate the feeling of pressure associated with sinus problems (tagline: "Relieve the pressure. Relieve the pain"). According to trade sources, RB has invested £4mn (€5.5mn / $6.1mn) in the campaign, which will run until January 2016. RB is also relaunching the **Lemsip Max All in One** line, which includes new packaging and a TV and online campaign describing it as "our best ever range", emphasising that it tackles all of the main cold & flu symptoms.

Elsewhere in the UK, Lanes Health has extended its well-known **Olbas** topical decongestant brand with **Max Strength All in One** capsules, formulated with paracetamol, phenylephrine and guaifenesin to combat common cold symptoms. Ads in trade publications tell pharmacists that cold & flu relief now comes from the "decongestant heavyweight!". Pfizer's Robitussin cough remedy has been joined by **RobiCold Sinus Relief**, a pharmacy-only cold & flu treatment formulated with ibuprofen and PSE. Trade ads claim RobiCold is "From the experts behind Robitussin". GSK has also been promoting pharmacy-only **Day / Night Nurse** to the trade, claiming that "Nothing is stronger for cold & flu – Day and Night" and that it is backed by a £2.5mn (€3.4mn / $3.8mn) media spend.

Turning to **Poland**, USP Zdrowie has launched TV ads for **Gripex Max / HotActiv Forte**, **Ibuprom Zatoki**

Airborne: Europe rollout begins

RB's rollout of Airborne immunity multivitamin has begun in Europe, with Airborne ImmunoDefensas now available in Portugal in 10-count effervescents (orange and lemon & lime flavours) and 32-count chewable tabs (orange and fruits of the forest). All options contain vitamin C 1,000mg and nine other vitamins & minerals.Trade ads for the line asks, "No inverno precisa de uma ajuda extra?" (Need a little extra help in winter?)

and **Pelavo**. The Gripex ad claims that it provides maximum strength against multiple common cold & flu symptoms, while the spot for Ibuprom Zatoki shows a woman using the product to get through a work meeting. Meanwhile, a TV ad for Pelavo – a natural remedy positioned for children – claims the brand combines natural ingredients with the latest medical knowledge to keep children free from fever and reduce associated symptoms.

Other systemic cold & flu developments:

Russia: Oscillococcinum (Boiron) TV ad depicts the brand as a cold & flu treatment suitable for family use

Germany: Bayer has launched a TV ad for new double-strength **Aspirin Plus C Forte** effervescents (aspirin 800mg and vitamin C 480mg)

Finland: Orion Pharma has introduced **Burana 400mg hot drink** powder sachets (ibuprofen 400mg); the 10 and 20-sachet packs are claimed to be the first ibuprofen hot drink in the country

Cough remedies:
Umckaloabo relaunched

In **Germany**, Schwabe has relaunched **Umckaloabo** (pelargonium) in new packaging, together with a print ad campaign with the tagline: "Stark gegen den Atemwegs Infekt" (Strong against respiratory infections).

A new TV campaign for **Ambrobene** (PGT) in **Russia** features a young girl dreaming of winning a singing contest, but she is plagued by a cough. With its "five actions against cough" the brand is able to help her to perform (Ambrobene is one of the sponsors of TV show The Voice in Russia). Elsewhere in Russia, OTCPharm has launched an innovative campaign for **Codelac Broncho**, positioning the product as a suitable treatment to reduce smokers' cough as well as cough as a result of upper respiratory tract infections.

Innovation in the **UK** includes the launch of **Covonia Hot Dose** cough & cold syrup (DXM and diphenhydramine, pharmacy-only), which is positioned as a nighttime remedy

More heavy A+P on the way for Bronchostop in 2015/16

for cough and runny nose. Thornton & Ross / Stada claims it is the first hot-dose cough medicine available in the "unique hot shot" format, with consumers diluting the syrup with water. As part of a £4mn (€5.5mn / $6.1mn) A+P spend, the marketer is also promoting its **alcohol & sugar-free chesty cough syrup** in trade ads.

Omega Pharma / Perrigo is maintaining its heavy A+P support in aid of **Bronchostop**, with a TV campaign beginning again from October. The key claim for the brand is that it relieves any kind of cough – trade resources inform pharmacists that a third of consumers do not know what kind of cough they are experiencing. These also claim that during winter one Bronchostop SKU is sold every 10 seconds.

Other cough remedies developments:

Poland: A new TV ad for **DexaPico** (Herbapol Lublin / Polpharma) stresses to mothers that no other cough remedy provides such prolonged relief (up to 8 hours)

Norway: Weifa extended Bronkyl with **Bronkyl Forte** 600mg effervescent tablets (acetylcysteine 600mg; lemon flavour)

France: Boiron has introduced **Stodaline** homeopathic cough syrup, a pure OTC sugar-free remedy (joins core Stodal syrup)

Sore throat remedies:
NPD in France

In **France**, **Ricola** (Ricola) has been extended with **Sensations Fraîcheur** soft-centre confectionery, available in cherry and glacial mint flavours. The brand's

Facebook page invited consumers to test the products and share feedback, while a TV ad also backed the launch.

Meanwhile, Omega Pharma / Perrigo extended the **Phytosun Arôms' Respiration** line with three options: **Sirop Gorge & Cordes Vocales** (syrup for the throat and vocal cords), which contains plant extracts (including thyme), honey and propolis; **Sirop Bronches**, combining eucalyptus essential oil and plant extracts to relieve congested bronchial tubes and boost respiratory comfort and **Inhaleur Respiration** nasal stick, which combines 12 essential oils to clear the airways and ease breathing (tracked under chest rubs & inhalants in ***DB6***).

Fervex has been extended with **Maux de Gorge Spray Adultes** (from 12+ years) and **Enfants** (from 3+ years). Both are registered as medical devices and have a honey flavour. A promotion running until March 2016 offers 100% reimbursement for one version when two are purchased at the same time

In **Russia**, a TV spot for **Hexoral** tablets (J&J) features a woman suffering from sore throat prior to giving a work presentation, with a graphic explaining the brand action before the tagline, "Hexoral. Treats, but doesn't mask, a sore throat."

There have been a number of developments for RB's **Strepsils** range across the region. In **Portugal**, new **Strepfen spray** (flurbiprofen 16.2mg / ml) is being promoted in trade magazines, claiming that the sugar-free option offers quick and direct pain relief and anti-inflammatory action for up to 6 hours (this joins the lozenge format). In **Poland**, latest line extension **Strepsils Immuno** can be seen in TV ads claiming that the addition of vitamin C 100mg means the product helps consumers to fight off infection as well as relieve sore throat. TV ads at the time of writing are also backing **Strepsils Intensive** (Strepfen). The Intensive version is also seen in TV ads in **Russia**, as is the honey & lemon product.

Elsewhere, a new TV ad for Omega Pharma / Perrigo's **Tymianek I Podbial** (thyme & coltsfoot) in **Poland** shows a firefighter spraying flowers from a hose, emphasising the brand image as a natural remedy that provides effective relief from sore throat. This ad promotes both pastilles and the newer syrup version, which also aids expectoration for those with wet cough. Also in Poland, Omega's **Sebidin** sore throat remedy is being backed by TV ads showing the tablets winning a battle vs bacteria.

In **Germany**, Pohl Boskamp has advertised **GeloRevoice** throat tablets for hoarseness at cinemas since 15 October 2015, in conjunction with the opening of the film Hotel Transylvania 2 (the ad features clips from the film).

Topical decongestants:
Marketers stress lasting effect

In **Ukraine**, a TV ad for **Nasivin Sensitive** nasal spray (Takeda for Merck) shows a man trying to count himself to sleep in the early hours of the morning because he is being kept awake by congestion, and is only able to drop off once he uses the brand. Claimed to provide up to 12 hours relief, the tagline reads: "Say night-night to colds".

Meanwhile, a new spot for **Xylogel** (Polfa Warszawa / Polpharma) in **Poland** shows a group of scientists demonstrating the efficacy of the brand at relieving blocked nose, highlighting that the gel does not run and provides long-lasting relief.

In **France**, **ProRhinel** (GSK) was extended with **Hygiène du Nez**, which is claimed to clean, hydrate and soothe the nasal cavity. The seawater medical device with added aloe vera is suitable for use from age 2+ years.

In **Norway**, Midsona has launched **Miwana Naturell** and **Miwana Plus+** saline nasal sprays. The former contains the same saline level as body fluid, so is gentle on mucosa, while Miwana Plus+ contains a higher concentration (3.5%) for added efficacy.

Results: Flonase breathes life into GSK sales

GLOBAL: GSK sales rose by 11% at constant exchange rates in Q3 2015 to £6.1bn (€8.3bn / $9.3bn). Consumer Healthcare, representing the Novartis j-v and GSK CH listed businesses in India and Nigeria, grew by 55% (+7% pro forma) to £1.6bn (€2.2bn / $2.4bn). Sales from product introductions in the past 3 years represent around 13% of Q3 sales. US sales grew by 61% (+18%) to £360mn (€491mn / $550mn), with Flonase OTC contributing just over half of growth. Theraflu grew well following the launch of warming syrups. The quarter also benefited from the relaunch of Nicorette lozenges and ongoing relaunches of Nicorette Minis and Alli, following supply issues in 2014. Sales in Europe grew by 87% (+1%) to £481mn (€656mn / $734mn). Voltaren continued to perform strongly, recording the highest ever market shares in Germany, Sweden, Poland and Italy, driven by a new ad campaign. International sales were £735mn (€1bn / $1.1bn), +37% (+6%). Wellness sales started to recover as markets returned to growth following the negative impact of reducing channel inventories in the acquired consumer businesses. Total Q3 Wellness sales were £813mn (€1.1bn / $1.2bn), up by 100%.

Comment: Influential fund manager, Neil Woodford, has reportedly met with Chairman, Philip Hampton, to discuss the potential split off of some GSK units, including Consumer Healthcare. According to *Sky News*, with GSK stock underperforming and the drawn out pipeline development, investors are growing impatient. A break-up of the business could unlock significant shareholder value. However, some are supportive of CEO Andrew Witty's strategy. *Sky News* quotes one investor: "Now is not the time to look again at the group structure because the benefits of the Novartis transaction are yet to come through."

Sanofi Consumer Healthcare +3.2%

GLOBAL: Sanofi's Q3 2015 sales were €9.6bn ($10.7bn), +3.4% at constant exchange rates vs Q3 2014. Consumer Healthcare sales rose by 3.2% to €814mn ($911mn), driven by Allegra (€91mn / $102mn, +11.5%), Lactacyd (€26mn / $29mn, +37.5%) and Dorflex (€21mn / $24mn, +55.6%). CHC sales in the US grew by 10.8% to €209mn ($234mn); Emerging Markets growth was +2.0% to €393mn ($440mn), driven by a low basis for comparison in Brazil, partially offset by lower sales in China. In Western Europe, sales fell by 7.6% to €146mn ($163mn), impacted by lower sales of Doliprane in France, where the price decreased in January. Rest of World sales grew by 20.7% to €66mn ($74mn), reflecting a good performance in Australia. Separately, Sanofi has declined to comment on reports that it may look at selling French beauty supplements marketer Oenobiol, acquired in 2009. According to *Bloomberg Business*, the company is considering the disposal of its bio-surgery and renal units, and looking at options for animal health unit Merial under a review led by CEO Olivier Brandicourt.

Bayer Consumer Care boosted by Merck products

GLOBAL: Bayer sales increased to €11bn ($12.3bn) in Q3 2015, a 1.9% increase on a currency and portfolio-adjusted basis vs Q3 2014. Products acquired from Merck Consumer Care added €366mn ($410mn) to Consumer Care (€1.4bn / $1.6bn, +1.7%). Antifungal Canesten (€72mn / $81mn, +19.5%) and Bepanthen / Bepanthol skin care products (€88mn / $99mn, +15.2%) registered particularly positive performances, especially in the Emerging Markets. Aspirin was down by 3.2% to €124mn ($139mn), as gains in Latin America / Africa / Middle East only partly offset declines in Europe. Aleve analgesic fell by 12.9% to €91mn ($102mn) against the strong prior-year quarter, owing particularly to changes in sales phasing in the US.

Nexium 24HR boosts Pfizer

GLOBAL: Pfizer's reported revenues fell by 2% in Q3 2015 vs Q3 2014 to €10.8bn ($12.1bn). Consumer Healthcare revenues rose by 7% operationally to €730mn ($817mn). This was owing primarily to Nexium 24HR in the US, driven by increased demand and lower revenues in Q3 2014, as retailers reduced initial stocking levels following the May 2014 launch.

P&G Healthcare -11%

GLOBAL: P&G's net sales in fiscal Q1 2016 (July-Sept 2015) were €14.7bn ($16.5bn), a 12% decrease vs fiscal Q1 2015. Healthcare net sales fell by 11% to €1.6bn ($1.8bn); organic sales were down by 1% as lower volume was partially offset by favourable geographic mix and increased pricing in Oral Care and Personal Health Care. Volume declined in both businesses following strong base period innovation, primarily in Oral Care, and owing to competitive activity and increased pricing.

RB in good health

GLOBAL: RB Q3 2015 net revenue fell by 1% (actual exchange) to £2.2bn (€3bn / $3.4bn) vs Q3 2014. Like-for-like growth was +7%. Health rose by 6% (+14% LFL) to £739mn (€1bn / $1.1bn), reflecting "excellent, broad-based growth across [the] Consumer Health portfolio". There were good performances from Nurofen, driven by consumer education programmes plus an improved go to market model in Russia, Strepsils (launch of Strefen Direct Spray) and Durex. The company also saw strong sell-in ahead of the flu season in Russia. But during the quarter, the US FDA granted approval of generic versions of the remaining extended-release Mucinex range of D, DM and SE Max, which could impact future sales of this brand leader in the US cough remedies market.

Perrigo delivers record Q3; aims to drive profit growth

GLOBAL: Perrigo net sales rose by 44% (on a constant currency basis) in the quarter ended 26 September 2015 vs fiscal Q3 2014 to a record €1.2bn ($1.3bn), comprised of €873mn ($977mn) from consumer-facing businesses. Consumer Healthcare net sales were €603mn ($675mn, +8%), reflecting new product sales of €58mn ($65mn) and a €44mn ($49mn) increase in sales of existing products (primarily gastrointestinal, infant formula and cough / cold), offset by €46mn ($52mn) of discontinued products, a €24mn ($27mn) decline in existing products (primarily animal health, diabetes and analgesics) and €13mn ($14mn) of unfavourable foreign currency movements. Branded Consumer Healthcare sales were €270mn ($302mn), including new product sales of €28mn ($31mn).

The company is taking the following actions, which are expected to add incremental benefits of €156mn ($175mn) to drive profit growth in 2016 and beyond:

- Refining its portfolio, including commencing a sales process for the US VMS business. [This] will improve operating margins and return on invested capital and is expected to deliver €31mn ($35mn) in annualised operating benefits
- Consolidating operations, supply chain and procurement management activities into one centre of excellence in Ireland. Global R&D leadership and Global Portfolio Management will drive a company-wide product selection and development process here
- Accelerating the realisation of the benefits from Perrigo's shared service model and improving operational efficiency by streamlining its organisational structure and eliminating redundant admin functions

Perrigo will reduce its workforce by around 6% (800 employees). The company also announced a €1.8bn ($2bn) share repurchase plan, which is expected to add around €0.138 ($0.155) to its 2016 adjusted earnings per share guidance. Separately, John Hendrickson has been promoted to Perrigo President, effective immediately.

Latin America drives Teva OTC

GLOBAL: Teva revenues were €4.3bn ($4.8bn) in Q3 2015, down by 5% vs the year ago quarter. Excluding the impact of foreign exchange fluctuations, revenues grew by 3%. OTC revenues related to PGT Healthcare, Teva's j-v with P&G, rose by 13% to €228mn ($255mn); in local currency terms, revenues increased by 37%, mainly owing to higher sales in Latin America. PGT's in-market sales were €340mn ($381mn), an increase of €8mn ($9mn).

Tylenol Arthritis relieves J&J

GLOBAL: J&J's sales fell by 7.4% to €15.3bn ($17.1bn) in Q3 2015 vs Q3 2014. Worldwide Consumer dipped by 7.7% to €2.9bn ($3.3bn), reflecting an operational rise of 3.1% and a negative currency impact of 10.8%. Domestic sales were +8.9%; international sales were -15.7%. On an operational basis, global sales were +4.0%, domestic sales +8.9% and international sales +1.5% (excluding acquisitions and divestitures). Worldwide OTC sales were up by 6.3% operationally to €860mn ($963mn) driven by US OTC and skin care, women's health outside the US and oral care worldwide. US growth of 22.4% was boosted by the reintroduction of Tylenol Arthritis; US adult analgesic market share was around 12.5% vs approximately 11% a year ago, while paediatric share was 44.5% (vs 41%). Seasonal inventory build for Zyrtec and initial stocking for relaunched digestive health products also boosted growth. Ex-US results were negatively impacted by the timing of seasonal inventory build for upper respiratory products.

Nestlé Health Science does well

GLOBAL: Nestlé sales were CHF64.9bn (€59.8bn / $67bn) in Q1-3 2015. Organic growth was 4.2% vs the year ago period, composed of 2% real internal growth and 2.2% pricing. Nestlé Health Science delivered broad-based growth, with strong performances in Europe and AOA (Asia, Oceania & sub-Saharan Africa). Consumer Care growth was driven by Boost and Carnation Breakfast Essentials in the US, Meritene in Europe and Nutren in Brazil. The allergy portfolio delivered good growth across key geographies for Medical Nutrition. The continuing rollout of Vitaflo also contributed. Diagnostics supported growth in Novel Therapeutic Nutrition, while generic competition in the GI segment impacted Lotronex.

BioGaia Q3 2015 results

SWEDEN: BioGaia's sales grew by 33% in Q3 2015 vs Q3 2014 to SEK105mn (€11mn / $12mn), +23% excluding foreign exchange effects. Meanwhile, Axel Sjöblad has been appointed as BioGaia Managing Director, effective 1 March 2016 at the latest. He is currently MD and VP North & Central Europe of Getinge Sverige. Predecessor Peter Rothschild, who founded BioGaia in 1990 with Jan Annwall, has been appointed as Group President, retaining overall responsibility for BioGaia's R&D activities. He will serve as working Chairman of BioGaia's production company TwoPac; and of IBT, its venture to develop a drug for premature newborns, and CapAble, the company's innovative delivery systems venture. He will also support the development of BioGaia Japan. Furthermore, Rothschild will continue as Chairman of Metabogen, BioGaia's investment in development of microbiome-based products and concepts.

Results in brief:

NORWAY: Navamedic sales were NOK61.5mn (€6.6mn / $7.4mn) in Q3 2015 vs NOK58.8mn (€6.3mn / $7.1mn) last year. Pharma and Healthcare business EBITDA was NOK5.1mn (€549,000 / $614,000) vs NOK4.6mn (€495,000 / $554,000); Group EBITDA was affected by acquisition costs and operational costs in the Medtech business, totalling NOK3.6mn (€387,000 / $434,000).

GLOBAL: Abbott reported sales of €4.6bn ($5.2bn) in Q3 2015, a 10.9% increase on an operational basis vs Q3 2014 (+1.4% reported). Worldwide Nutrition sales rose by 6.5% to €1.6bn ($1.8bn); Diagnostics was +7.9% to €983mn ($1.1bn); Established Pharmaceuticals rose by 42.6% to €859mn ($961mn) and Medical Devices was +1.2% to €1.1bn ($1.2bn).

DENMARK: Chr Hansen revenue was €859mn ($961mn) in FY 2014/15 vs €756mn ($846mn) in FY 2013/14, corresponding to organic growth of 10%. The Health & Nutrition division delivered organic growth of 13%. Q4 revenue was +14% vs the year-ago period to €234mn ($262mn), corresponding to organic growth of 11%.

M&A

Deal for Omega and Dompé

GLOBAL: Under an international marketing agreement with Dompé Farmaceutici, Omega Pharma (Perrigo) has been granted the exclusive right to distribute the Italian biopharmaceutical group's main OTC brands in 50+ countries. The first marketing activities, expected in 2017, should cover key countries in Europe. According to Nicholas Hall's ***DB6*** Global OTC Database, Dompé's sales were €29.8mn ($36.1mn) in 2014 and its key OTC brands are Fluifort cough remedy and Okitask systemic analgesic.

SFI to acquire Potters

SWITZERLAND / UK: Soho Flordis International, through its Swiss subsidiary Ginsana, will acquire Potters, the leading UK manufacturer and supplier of traditional herbal treatments, from Vifor Pharma (Galenica) for an undisclosed sum. Potters is the oldest herbal medicine company in the UK. Its extensive range of well-established products includes treatments for cough / cold, pain and joint care, gastrointestinal disorders and women's health. It features brands such as Red Kooga, Seatone, Calcia and Equazen. Backed by robust specific clinical research, in recent years Equazen has expanded to deliver brain health solutions to various patient groups. The brand also includes the international product, Equazen Eye Q. The deal is expected to close in Q4 2015.

Tasty acquisitions for Kerry

IRELAND / US: Kerry has acquired US-based Biothera's Wellmune business, Red Arrow Products and Island Oasis for a total consideration of €657mn ($735mn), significantly expanding the Irish group's portfolio of taste and nutrition solutions for food, beverages and pharmaceuticals. Wellmune produces and markets the Wellmune branded natural food, beverage and supplement ingredient clinically proven to strengthen immunity. It is formulated in a growing number of products in 50+ countries. Red Arrow Products supplies natural smoke and savoury grill flavours worldwide, while Island Oasis supplies all-natural premium cocktail mixes and customised beverages to the US hospitality segments.

Mid Europa Partners extends Walmark ownership

CZECH REPUBLIC: Mid Europa Partners has acquired the outstanding 50% share in food supplements specialist Walmark from the Walach family, who founded the company 25 years ago, for an undisclosed sum. Reports suggest that the deal is subject to approval by the competition authority. Separately, Walmark has acquired Czech natural products player Valosun for an undisclosed sum. Valosun's key brands include Biopron probiotic and Uroval for urinary health and it has a strong presence in Czech Republic and Slovakia. Walmark CEO, Jorge Manuel, said: "We are delighted to add Valosun's brands, team and medical expertise to our portfolio of valued assets, which will complement our existing presence in two key growth categories and further strengthen our position in the key Czech and Slovak markets."

Futura strikes special deal

UK: Futura Medical has out-licensed to Quantum Pharma, a manufacturer and supplier of unregistered medicines, the exclusive rights to its erectile dysfunction treatment, MED2002, to be sold as a "Special" in the UK. Futura will receive undisclosed royalties from Quantum on product sales. Specials are medicines that have not been authorised and which are requested and prescribed for the treatment on a named patient basis only by appropriately qualified doctors under their own authority. Such requests can only be made subject to certain criteria, including the absence of licensed alternatives. MED2002 meets the UK criteria for a Special because of the estimated 7.5% of ED sufferers who cannot be prescribed PDE5 inhibitors, such as Pfizer's Viagra (sildenafil), owing to contra-indications with other medicines.

M&A in brief:

SPAIN / ITALY: Uriach Aquilea has acquired Italian marketer Laborest for an undisclosed sum under its 2013-17 Strategic Plan, which covers growth through international expansion and acquisition. Laborest's annual turnover is reportedly around €25mn ($28mn), with the dietary supplement specialist's portfolio including Tiobec multivitamin and Pineal sedative.

SWITZERLAND / UKRAINE: Switzerland's Acino Pharma has acquired Ukrainian company Pharma Start for an undisclosed sum. The acquisition is in line with Acino's strategy to expand in the CIS, enabling it to gradually enter other regional markets, including Russia, Belarus and Kazakhstan. The deal adds 35 products to its portfolio, mainly generics and retard formulations.

GLOBAL: Endo has completed its acquisition of privately-held Par Pharmaceutical from TPG in a deal valued at €7.2bn ($8.1bn), including assumption of Par debt. The combination creates a speciality pharmaceutical company with a fast-growing generics business.

SWEDEN: Karo Bio has acquired Swereco, which markets OTC products mainly to pharmacies or directly to healthcare providers, for SEK250mn (€26mn / $30m), around 1.7x net sales. Swereco's portfolio comprises several well-established brands, including Mabs medical compression stockings, which lead the local market.

FINLAND: VTT Technical Research Centre of Finland is seeking a partner to commercialise its beauty patch technology. The aim is to expand the technology's possible applications into areas of medicine, such as the skin absorption of medicines.

GLOBAL: Pfizer and Allergan shares rose on speculation that the MNC had the Botox maker in its sights following its failed takeover of AstraZeneca in 2014. Any such deal is unlikely before Teva completes its €36.2bn ($40.5bn) acquisition of Allergan's global generic pharmaceuticals business – including the international OTC commercial unit (but not OTC eye care products) – in Q1 2016. Allergan has since confirmed that it has been approached by Pfizer and is in preliminary friendly discussions regarding a potential transaction. Both companies emphasised that no agreement has been reached and there can be no certainty that the discussions will lead to a deal. They will also not comment on speculation regarding the terms of a potential transaction.

Company

Merck revamps brand identity

GLOBAL: Germany-based Merck has relaunched its brand identity. The fundamental revision of the visual appearance, which is inspired by the "colourful and multifaceted shapes seen under a microscope," as well as the introduction of a new logo, reflect the transformation into a global science and technology company. The brand architecture at business level has also been simplified. Outside the US and Canada, the company will operate uniformly as Merck. It will operate in those two countries as EMD Serono in biopharmaceuticals, EMD Performance Materials in high-tech materials, and EMD Millipore in life sciences until the Sigma-Aldrich acquisition has completed (expected within the next 2 months). The previously independent divisional brands, Merck Serono and Merck Millipore, will be eliminated and will operate as the biopharmaceutical business of Merck and as the life science business of Merck, respectively.

The company has also opened an Innovation Centre in Darmstadt, establishing a platform for innovations from around the world. The centre will give employees and external innovators the opportunity to develop their ideas with the company's support. It is being opened to founders and start-ups from the healthcare, life sciences and performance materials sectors. Via the Merck Accelerator programme, start-ups receive strategic and operational advice over 3 months, plus €25,000 ($28,000). One example is Apoly, which has developed an app that will serve as a pocket pharmacy. Users select symptoms and based on medical data within the app, receive recommendations on OTC treatments or are encouraged to consult a physician. Over the next 5 years, Merck will invest around €1bn ($1.1bn) in the Darmstadt site. CEO Karl-Ludwig Kley sees "innovation and creativity, courage and entrepreneurial spirit" as the main drivers of Merck's successful development.

Separately, Stefan Oschmann has been appointed as Chairman of the Executive Board & CEO of Merck, to take effect 29 April 2016. Oschmann will succeed Karl-Ludwig Kley, who retires after 9 years as Merck CEO.

Totally Wicked ruling

EU: Totally Wicked has formally challenged in the European Courts of Justice the EU Tobacco Product Directive, which the UK-based e-cigarette manufacturer believes breaks EU law. Totally Wicked believes that the TPD "represents a disproportionate impediment to the free movement of goods and the free provision of services, places e-cigarettes at an unjustified competitive disadvantage to tobacco products, fails to comply with the general EU principle of equality, and breaches the fundamental rights of e-cigarette manufacturers". It is set to come into force in May 2016.

Infirst to market

UK: Infirst Healthcare is accelerating commercialisation of its consumer medicines, after raising a further £13.2mn (€18mn / $20mn) from Invesco Asset Management funds. Cough remedy Unicough (ammonium chloride 135mg, levomenthol 1.1mg and diphenhydramine 14mg / 5ml) will launch in November 2015 in Boots and independent pharmacies. Its cocoa-formulation makes it a thick demulcent, which forms a film over the mucous membrane in the buccal cavity and throat. Flarin (ibuprofen 200mg) soft capsules, which relieve joint pain and inflammation, have also received UK registration. Infirst is preparing for a 2016 launch of the pharmacy-only product, and has commenced plans to expand into Europe. Under a US licence agreement with McNeil (J&J), Infirst launched Mylicon drops (simethicone 20mg) in July 2015, while Mylanta (aluminium hydroxide 200mg, magnesium 200mg and simethicone 20mg) will launch in early 2016.

DHU rolls out Mama Natura

GERMANY: Schwabe subsidiary DHU has rolled out the Mama Natura range of homeopathic products for children in its domestic market. The new line-up includes Bellelin antiflatulent, Dentilin for teething, Broncholin cough remedy and Zappelin sedative, with marketing support including pharmacy ads and a Facebook page. A number of other Mama Natura products, such as options for infant colic and ADHD, are already available in other European markets, including Italy, Spain, Netherlands and Bulgaria.

Dr Jan Winters joins Diapharm

GERMANY: Dr Jan Winters has been appointed as Senior Manager Regulatory Affairs Food Supplements at Diapharm. Based in Munster, he will assist Diapharm clients to develop, evalute and maintain supplements. Dr Winters previously worked for the pharmaceutical industry as a regulatory consultant on the development of supplements, dietetic foods and functional foods.

Retailer

Ruling on sale of OTCs online

SWITZERLAND: The Federal Court has ruled that mail order pharmacies cannot sell OTCs online unless directly prescribed by a doctor. It stated that retailer Zur Rose's online questionnaire with an option to contact a GP personally were not sufficient. Complaints about the practice were brought by regulatory association Swissmedic, national pharmacy association, PharmaSuisse and the Association of Druggists.

36.6 merges with A.V.E

RUSSIA: Pharmacy Chain 36.6 has completed its merger with pharmacy chain A.V.E. The controlling shareholder of 36.6 is Palesora Company Ltd, also owner of A.V.E, which will now become part of the 36.6 group.

Walgreens Boots Alliance posts positive result

GLOBAL: Walgreens Boots Alliance (WBA) net sales rose by 49.7% to €25.5bn ($28.5bn) in the 3 months ended 31 August 2015 vs fiscal 2014 Q4, owing largely to the inclusion of Alliance Boots consolidated results. Adjusted net earnings attributable to WBA increased by 30.1% to €866mn ($969mn). In fiscal 2015, net sales were €92bn ($103bn) vs €67.9bn ($76bn) in fiscal 2014; adjusted net earnings attributable to WBA increased by 28.9% to €3.7bn ($4.1bn). Combined net synergies were €714mn ($799mn), including €72mn ($81mn) classified as synergies in Q4, which related to activities commencing in prior fiscal years. The company continues to expect to reach at least €893mn ($1bn) in combined net synergies in fiscal 2016.

Celesio gets off to solid start

EUROPE / US: McKesson-owned Celesio generated group revenue of €10.7bn ($12bn) in fiscal H1 2016

(1 April 2015-30 Sept 2015), a 1.8% increase on a constant currency basis. Adjusted earnings before interest and tax rose by 9.0% to €235mn ($263mn), driven by the strong performance of UK operations and the overall development in Consumer Solutions (pharmacy business). Beginning 1 April 2015, Celesio changed the fiscal reporting period to a 31 March fiscal year. For comparison purposes, H1 fiscal year 2016 results will be compared to the results for H1 fiscal year 2014. Consumer Solutions revenue grew by 8.4% to €2.1bn ($2.4bn), with Pharmacy Solutions (wholesale business) advancing +0.4% to €8.6bn ($9.6bn). Separately, McKesson revenues in the quarter ended 30 September 2015 rose by 10% vs fiscal Q2 2015 to €43.6bn ($48.8bn). On a constant currency basis, revenues increased by 14%.

Rosta strengthens its position

RUSSIA: Rosta has acquired pharmacy chain Ladushka, which comprises 270 discount stores, according to reports. Rosta operates 875 stores under the Raduga and Pervaya Pomosh banners and the acquisition is expected to make it Russia's third largest drugstore chain, with a market share of 3%. The deal has been approved by the Federal Antimonopoly Service and is expected to complete in H1 2016. Separately, Melodiya Zdorovya pharmacy has acquired pharmacy network, Bliznitsiy, a leading chain in the Samara region with 30 outlets.

Public health

Reimbursement amendments in Denmark

DENMARK: The reimbursement status of certain low-dose analgesics will be altered on 29 February 2016. OTCs losing reimbursement include:

- Aspirin 500mg in 20-count packs and smaller
- Ibuprofen 200mg in 20-count packs and smaller
- Paracetamol 500mg and 1,000mg tablets, film-coated tablets, effervescent tablets and suppositories, as well as paracetamol dispersible tablets, powder for oral solution and orodispersible tablets

Options that remain eligible for reimbursement under amended conditions are paracetamol suspension and suppositories (OTC). The condition for reimbursement has been changed from "chronic pain" to "children with long-term pain where treatment with paracetamol in solid oral formulations is not possible". In addition, naproxen suppositories, paracetamol effervescents and paracetamol suppositories (all Rx) will lose automatic reimbursement and will be reimbursed only when treatment by oral drugs is not possible (suppositories) and when treatment by solid oral formulations is not possible (effervescents). All options maintaining automatic reimbursement are Rx.

Several recalls in France

FRANCE: Various lots of **Sinomarin** topical decongestant (medical device) distributed before March 2015 have been recalled as a preventive measure owing to the discovery of possible microbiological non-conformity, according to lemoniteurdespharmacies.fr. Marketed by Omega Pharma (Perrigo) for Gerolymatos, versions manufactured in 2015 are not affected. Elsewhere, Sanofi has recalled 33 lots of **Hemoclar** 0.5% cream (30g) distributed from June 2011-February 2014, owing to a reduction of active ingredient pentosan polysulfate over time. Hemoclar relieves mild trauma such as bruises and bumps.

Meanwhile, Pierre Fabre has recalled all lots of **Topaal** antacid tablets and oral suspension (magnesium carbonate, aluminium hydroxide, alginic acid and silica) as a precautionary measure. This follows production issues with alginic acid at manufacturing site Cargill France. ANSM inspected the plant in July 2015 following complaints from several consumers about the product's bad taste and fishy odour. Pierre Fabre discontinued Topaal oral suspension in January 2015. Arkopharma then recalled all lots of **Arkogelules Fucus** (45 capsules, to support weight loss) as a precautionary measure owing to the same manufacturing issues.

No evidence isoflavones are harmful post-menopause

EU: A comprehensive review by EFSA's expert Panel on Food Additives of the available scientific evidence has revealed no indication that isoflavones at levels typically found in supplements have harmful effects on the three organs considered for this assessment – mammary gland, uterus and thyroid gland. The main isoflavones – naturally occurring substances found in soy, red clover and kudzu root, among other sources – are genistein, daidzein, glycitein, formononetin, biochanin A and puerarin, which possess oestrogenic properties. EFSA experts also attempted to assess the possible risks for women during the transition period to menopause and for menopausal women with a history or family history of cancer but there is no data to assess the safety of these substances for those groups.

Alteration to self-selection list

FRANCE: Diphenhydramine and dimenhydrinate-based medicines have been removed from the self-selection list owing to possible abuse and addiction of the ingredients. This affects Mercalm tablets (Hepatoum, dimenhydrinate and caffeine), Nausicalm Adultes 50mg capsules and Nausicalm syrup (both Laboratoires Nogues, dimenhydrinate), all antinauseants. Separately, 19 SKUs have been added to the self-selection list, including Lysopaïne Maux de Gorge strawberry and honey & lemon sugar free cetylpyridinium and lysozyme lozenges (BI, both 36-count), MycoHydralin clotrimazole 500mg vaginal suppository (Bayer, 1-count) and Smectalia diosmectite 3g oral suspension sachets (Ipsen, 12-count).

ASA blasts New Nordic ad

UK: The Advertising Standards Authority has upheld a complaint about a print ad for New Nordic's Blue Berry Eyebright Plus supplement (vitamin A 400mg per daily dose). The complainant challenged whether claims that implied the product improved vision complied with the requirements of EC Regulation 1924/2006 on nutrition & health claims made on foods, which was reflected in the Committee of Advertising Practice Code.

EFSA panel sees no Equazen Eye Q claim

EU: EFSA's Panel on Dietetic Products, Nutrition & Allergies has concluded that a cause & effect relationship has not been established between consumption of Equazen Eye Q (EPA, DHA and GLA, at a weight ratio of 9:3:1) and improving reading ability in children. Vifor Pharma / Galenica submitted the health claim application under Article 14 of Regulation (EC) No.1924 / 2006.

RPS calls for read-write access to patient records

ENGLAND: The Royal Pharmaceutical Society is calling for pharmacists to have secure, electronic access to a single up-to-date patient record, which would improve medicine use, keep patients and HCPs better informed and provide more holistic care. The NHS in England has already announced a programme to roll out Summary Care Record access to community pharmacies nationwide after pilots showed this reduced unnecessary visits to GPs and avoidable medicine errors. The RPS wants to see a staged expansion of this initiative leading to pharmacist read-write access to a single complete electronic health record for all patients, which is in development. Focus groups revealed that patients support pharmacist access to full patient records where they themselves choose and explicitly consent to who may access the information. Some electronic health records are already shared between GPs, some hospital staff and emergency services.

Public health in brief:

POLAND: The Office for Registration of Medicinal Products, Medical Devices & Biocidal Products has approved the Rx-to-OTC switch of Merck's Vigantoletten 500 and 1000 (cholecalciferol 12.5ug and 25ug) tablets, positioned to treat rickets and osteomalacia.

RUSSIA: The Federal Service for Health & Social Development has withdrawn several analgesics, reportedly owing to a range of production issues. Affected products include Aspirin 500mg tablets from Uralbiofarm and Medisorb (both 10-count), and Revalgin (metamizole 500mg, 10-tab; Shreya Life Sciences).

SWEDEN: OTC paracetamol tablets may no longer be sold outside of pharmacies as of 1 November 2015, owing to increased levels of paracetamol poisoning since the ingredient became available in non-pharmacy outlets in 2009.

Products round-up: Shake-up of leading analgesics in France

FRANCE: Sanofi extended paracetamol brand Doliprane with a pure OTC line in October 2015. This comprises: **Doliprane Caps** 1,000mg (8-caps); **Doliprane Tabs** 1,000mg (8-tabs) and 500mg (16-tabs); **Doliprane Orodoz** 500mg (16-orodispersible tabs); **Doliprane Vitamine** C 500mg / 150mg (16-effervescent tabs); **Doliprane Codéine** 400mg / 20mg (16-tabs); and paediatric syrups **Doliprane Liquiz** 200mg and 300mg (12-liquid sachets, see left). All are eligible for self-selection in pharmacies, with the exception of Codéine and Liquiz. The majority of existing Doliprane SKUs are reimbursed at 65% when prescribed and the brand has a largely ethical positioning, with around 80% of sales generated via prescription, according to industry sources.

Meanwhile, Upsa / BMS has rebranded paracetamol brand Efferalgan, with reimbursed options now called **Efferalganmed**. This affects 500mg and 1,000mg effervescents and 500mg tablets (all reimbursed at 65% when prescribed). Meanwhile, pure OTC versions EfferalganTab (1,000mg tablets) and EfferalganOdis (500mg orodispersible tablets) have been renamed Efferalgan. All rebranded options are expected to be available in pharmacies immediately, with the exception of Efferalganmed effervescents; the 500mg option is expected in January 2016 and the 1,000mg version at end-November 2015.

Category spotlight: Probiotics

In **Spain**, Chiesi has launched probiotic supplement range **Produo**. The lactic-acid based line is positioned to "restore, maintain and preserve health of the whole family" and comprises everyday options Daily Care (lactic acid and vitamin C, capsules) and Daily Kids (lactic acid, chewable tablets), which are claimed to support intestinal and immune health and reduce fatigue. Produo also includes Stop (lactic acid, soluble granules) Flora (lactic acid and vitamin C, chewable tablets) and Derma (lactic acid and biotin, soluble sticks) options, which are said to strengthen intestinal, immune and skin health, respectively. All use a patented double protective coating to ensure that bacteria reaches the intestine.

Produo is positioned for the whole family

Meanwhile in **France**, Laboratoire Carrare has launched **Bioprotus Buccal**, a supplement claimed to be the first probiotic to support oral flora and healthy teeth. Combining lactic ferments (lactobacillus, bifidobacterium and streptococcus) with calcium and xylitol, it is available in a 14x2g orodispersible stick pack. Elsewhere, Angelini has launched **Feminella Hereditum** in **Poland**, a supplement designed to promote breast milk production. It contains lactobacillus fermentum Lc40, which is said to naturally occur in breast milk, and is available in a 21-cap pack (recommended dose is one capsule per day).

Healthy chocolate from Nestlé

ITALY: Nestlé Health Science has extended the Meritene line with **Meritene Vitachoco**, a supplement available as Swiss chocolate squares which contain 12 vitamins (including A, B6 and B12) and five minerals (including zinc and iron). The product is positioned for adults and older consumers who feel fatigue with the change of seasons.

Pierre Fabre launches treatment for viral skin infection

PORTUGAL: Pierre Fabre has launched Laboratorios Vinas' **Molusk**, a medical device to easily and safely treat molluscum contagiosum and remove skin lesions in children. Available in a 3g SKU, it is formulated with potassium hydroxide 10% and has an anti-spill valve to increase safety.

Chondrostéo joint care line extended

FRANCE: Laboratoire des Granions / EA Pharma has extended the Chondrostéo joint care line with **Chondrostéo+ Flash**, a supplement claimed to support joint comfort and maintain flexibility. Available in pharmacies and parapharmacies, a 40-cap pack (10-days treatment) retails for around €10.90 ($12.20). Chondrostéo+ Flash contains patented ingredient Mangoselect, harpagophytum, boswellia and copper and is said to be effective after 5 days use, according to clinical studies. Laboratoire des Granions stresses that the new option can be used alongside core Chondrostéo tablets, while the line also includes a gel and roll-on massage oil.

Teething gel is kind to gums

NETHERLANDS: VSM has launched **Chamodent tandgel** for teething under the VSM Kind banner. This is claimed to nourish and soften gums via its natural formula of mallow and panthenol. It can be used from birth, is said to have a pleasant taste and a 10g tube costs €6.99 ($7.82).

Creon 5,000 U now in pharmacies

FRANCE: Creon (Mylan) pancreatin digestive enzyme brand has been extended in pharmacies with **Creon 5,000 U**, which has a paediatric positioning and is reimbursed at 65% when prescribed. Previously only available in hospitals, it joins 12,000, 25,000 and 40,000 U versions on sale in pharmacies. Creon 5,000 U is available in direct granules which should be incorporated into food or drink, while other Creon options are available in granule-filled capsules to be swallowed.

Nurofen extended with MultiSymptom migraine option

RUSSIA: RB has rolled out **Nurofen MultiSymptom.** Positioned for migraine, it combines ibuprofen 400mg and paracetamol 325mg and is available in a 10-tab pack.

Rescue Plus rolled out

UK: Nelsons' Rescue Remedy sedative has been extended with **Rescue Plus** lozenges, which contain B vitamins and have an orange & elderflower centre. These are claimed to "support daily performance" and a prize draw on the brand Facebook page supports the launch.

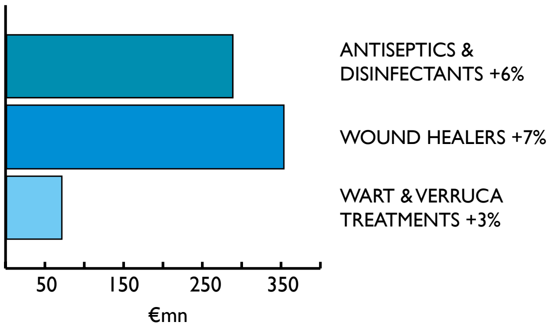
Derma 3: No pain for wound healers

AT-A-GLANCE GUIDE: DERMA 3 2015

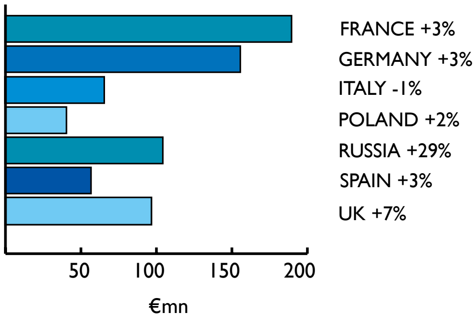
TOPLINE: Overall revenue grew by 6%, with largest category wound healers growing just ahead of this. Marketers invest in frequent NPD and A+P support for their paediatric brands, with emotive ads targeting mothers. Antiseptics & disinfectants also did well, with branded options holding on to the lead, although low-cost generics performed positively. Wart & verruca treatments advanced slightly and sales remain modest. Croytherapy options are the most popular here, with consumers appreciating their efficacy and ease of use.

MARKETERS / BRANDS: Large players feature prominently across the region, with Bayer (Bepanthen), Mundipharma (Betadine), Omega Pharma / Perrigo (Wartner) and Schülke & Mayr (Octenisept) fielding leading entries. However, local players are gaining ground, particularly in Poland and Russia, where per capita spend is among the lowest.

Derma 3: Sales by category 2015



Derma 3: Sales by country 2015



Europe: OTC Derma 3 2015

(MSP)	FRANCE	GERMANY	ITALY	POLAND	RUSSIA	SPAIN	UK
Antiseptics & disinfectants	99	49	26	16	44	16	35
Wound healers	65	94	32	21	59	38	49
Wart & verruca	23	15	9	5	N/A	5	15
TOTAL (€mn)	**187**	**159**	**66**	**42**	**104**	**59**	**98**
TOTAL ($mn)	**209**	**177**	**74**	**47**	**116**	**66**	**110**
Index 2015/2014	**103**	**103**	**099**	**102**	**129**	**103**	**107**
Population (mn)	64	81	60	39	144	47	64
Per capita spend ($)	3.27	2.19	1.23	1.21	0.81	1.40	1.72

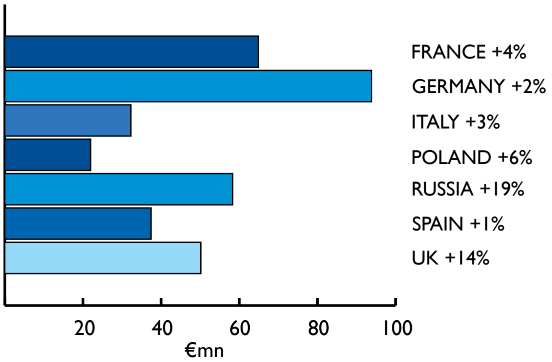
All data in this report 12 months to end June 2015 (MAT): Nicholas Hall's *OTC INSIGHT* based on Nicholas Hall's ***DB6*** Global OTC Database, in partnership with Nielsen, DSM, PharmaExpert and INSIGHT Health in certain countries. Exchange rates: $/€: 0.9; €/PZL: 4.2; €/Rb: 75.2; €/£: 0.73 based on average figures from 01/09/15-07/09/15 from oanda.com. Owing to changes in channel coverage, data is not directly comparable to last year's *Market Report*

Derma 3: Category analysis

Wound healers

- Sales up by 7% to €359mn ($401mn)
- Russia was the best-performing market, although growth was largely inflationary, while sales in the UK grew strongly, driven by Metanium and Acriflex (both Thornton & Ross / Stada)
- Options for nappy rash and paediatric use are key
- Bepanthen fares well across the region and has been extended in several markets with Extra Protect ointment for infants aged 0-12 months

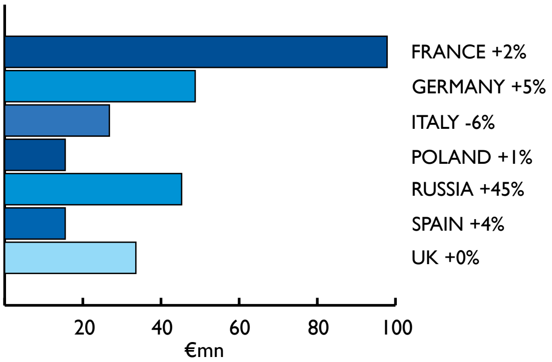
Derma 3: Wound healers sales by country 2015



Antiseptics & disinfectants

- The topline grew by 6% €285mn ($319mn), with a strong performance in Russia driving growth
- Myramistin (Infamed) leads the rankings in Russia; sales grew strongly, boosted by humorous ads showing a man on a mission to destroy infection
- Betadine (Mundipharma, marketed under licence in several markets) is among the leading brands across the region, although low-cost generics continue to pose a threat

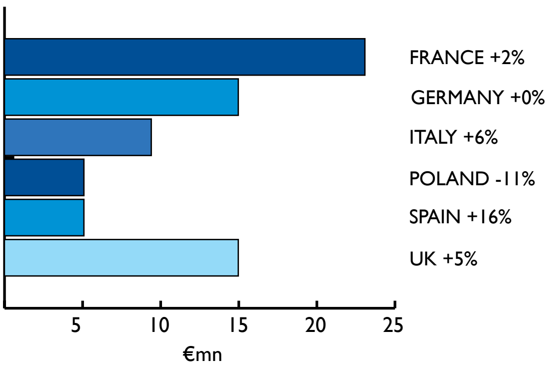
Derma 3: Antiseptics & disinfectants sales by country 2015



Wart & verruca treatments

- Total revenue increased by 3% to €72mn ($81mn)
- Spain recorded the standout performance, albeit from a modest base
- Omega Pharma / Perrigo continues to dominate the category via Wartner, although there is strong competition among cryotherapy treatments
- Meda has extended its formic acid brand, EndWarts, with a pen version and promotion states: "Efficacy in your hands"

Derma 3: Wart & verruca treatments sales by country 2015



France

Antiseptics & disinfectants: Biseptinescrub discontinued

- Cooper launches sanitiser for sensitive skin

The topline increased by 2%, with low single-digit growth for leading brands including Biseptine (Bayer), Mercurochrome (Urgo) and Betadine (Meda for Mundipharma, semi-ethical). Bayer has focused promotion on May 2014 launch Biseptinecompress, with TV and online ads showing a mother cleaning a graze after her son falls from a tree, accompanied by the tagline, "Votre allié contre les petits bobos" (Your ally against little cuts). Registered as a medical device and available in a pack of eight individually-wrapped wipes, the line also comprises Biseptinespraid spray (pure OTC) and semi-ethical Biseptine. The marketer discontinued Biseptinescrub (chlorhexidine and benzalkonium) in early 2015.

In July 2015, online reports suggested that Biseptine poses a danger when used on newborn babies. Often prescribed by midwives to clean the umbilical cord, one blogger noted that the product notice states it should not be used on premature or newborn skin, as it may pass in to the blood stream. HCPs were quick to respond and dispel the idea, stating that it came from an error in the transcription of the summary of product characteristics, which states that the risk of skin absorption cannot be excluded owing to an absence of data.

A TV ad campaign for the long-line Mercurochrome range was developed in summer 2015 (see below) and carried

A+P support claims that Mercurochrome Eosine 2% does not sting

the tagline, "Mercurochrome, avec vous à tous les coups" (Mercurochrome, with you in every instance), stating that life is full of adventures, and for each of them there exists a Mercurochrome solution. A competition also ran in July-August 2015, with consumers invited to take part in a brand quiz to be in with a chance of winning prizes including a camera and Mercurochrome first aid kits.

Cooper fields several antiseptic & disinfectant brands, including semi-ethical Dakin Cooper Stabilisé (sodium hypochlorite) and Baccide. Promotion for the latter included print ads in Q2 2014 which focused on the essential oil purifying room spray, said to have an antibacterial and antifungal action and kill viruses. The Baccide hand sanitiser line was extended in 2015 with a gel for sensitive skin, which is enriched with aloe vera to protect delicate skin and available in 30ml, 75ml and 300ml SKUs. Cooper claims that this is the first hydroalcoholic gel for sensitive skin available in France. Baccide was praised in *Top Santé*'s March 2015 issue for its low cost.

Wound healers: BI launches PO 12 Repar

- Sanofi discontinues Avibon

Sales increased by 4%, with positive performances recorded through much of the category. Mitosyl (Sanofi) was promoted via frequent TV & print ads which stressed efficacy in soothing nappy rash and protecting the skin, while also highlighting the easy-open cap. The marketer is currently offering a free pack of Mitosyl wipes (72-count) when three are purchased. In October 2014, the marketer launched Les Essentiels de bébé, a free app that allows parents to input and track their baby's developments, and includes a vaccination calendar and height and weight charts, among other features.

Separately, Sanofi discontinued Avibon pommade (vitamin A) in early 2015, following around a year of stocking problems owing to product stability. This was indicated to relieve contact dermatitis, but had found favour among consumers as a wrinkle treatment.

Pierre Fabre maintains a strong presence in the category via Cicalfate (marketed under the Avène banner) and Epithelial AH (under the A-Derma banner) cosmetics, as well as OTC registered Cicatryl (allantoin, chlorocresol, vitamin E, and guaiazulene). Shelf displays supported Cicatryl and stressed efficacy against cuts and burns, carrying the brand tagline, "Si utile, si facile, Cicatryl!" (So useful, so easy, Cicatryl!).

Promotion for Boiron's Homéoplasmine continued, with print and outdoor ads highlighting efficacy against sore noses in winter and grazed knees in summer. Bi-Oil (Omega Pharma / Perrigo) was seen in TV & print ads stressing efficacy against scars and stretch marks, while ads claim it is the No.1 dermocosmetic for scars and stretch marks in 17 countries.

Bayer invested in TV support for Bepanthen Sensicalm eczema treatment and Bepanthen Cica scar treatment. Both are registered as medical devices and available in 20g tubes, the latter with a massage applicator included. Meanwhile, September 2014 launch Bepanthen Protect (dermocosmetic, 30g and 100g) has been seen in the trade press, with ads stressing that it is specifically designed for the first 12 months of life and that it protects and reinforces the derma barrier while neutralising the aggressive effect of urine and faecal enzymes. Bepanthen 5% generics Dexpanthénol Sandoz Conseil 5% (Sandoz / Novartis, 100g) and Dexpanthénol Biogaran Conseil 5% (Biogaran / Servier, 30g and 100g) were added to the self-selection list in February and July 2015 respectively.

Bepanthen Protect combines olive oil with vitamin B3

PO 12 Repar is claimed to protect the wound and support healing

In October 2015, J&J unveiled a print ad campaign for long-line Biafine dermocosmetic range, which will run until December 2015 and repositions the brand as an everyday essential. Ads target women and state: "Ma vie, ma peau, mon réconfort" (My life, my skin, my comfort).

Meanwhile, BI introduced PO 12 Repar in late 2014, a medical device said to have a double action on wounds, offering protection and hydration. It is available in a lotion, spray (both hyaluronic acid, B-glucan, allantoin and d-panthenol, for cuts), and cream (sucralfate 4%, arginine and d-panthenol, for burns) and can be used from age 3+ years. These joined core PO 12 anti-itch treatment. Print and online ads supported the launch in summer 2015 and stressed that cuts quickly disappear when they are properly hydrated, while the line has also been reviewed by several bloggers.

Wart & verruca: Objectif ZeroVerrue pen launched

- Topline +2%

Omega Pharma / Perrigo's Wartner leads the rankings, although there was little brand development. Elsewhere, RB promoted Scholl SOS Verrues on TV in the reporting period, with ads showing a mother using the cryotherapy treatment to get rid of a verruca in one treatment.

Meda invested in frequent TV ads and print advertorials to support Objectif ZeroVerrue (formic acid 85%), with ads stating, "L'efficacité à portée de main" (Efficacy in your hands). The brand was extended in spring 2015 with a pen format, which is registered as a medical device and said to provide 30 applications.

Germany

Antiseptics & disinfectants: Sterillium cleans up

• Schülke & Mayr hits social media

Antiseptics & disinfectants advanced by 5%, with Sterillium (isopropyl alcohol) recording the category's outstanding performance. In October 2014, BfArM warned parents not to use chlorhexidine when disinfecting infants' skin, as this could lead to burns. The ingredient is present in several Top 10 entries, including Bayer's Bepanthen Antiseptic, which grew at below the category average.

Octenisept (octenidine and phenoxyethanol) grew by 6%, despite relatively little A+P backing, while internet sales (not included in our topline) increased by 30%, equivalent to around 10% of pharmacy turnover. Schülke & Mayr also fields Top 10 brand Kodan (-2%, isopropyl alcohol) and lower-tier entry Desderman Pure (flat sales, ethanol), the latter strongly positioned for hand hygiene. The marketer ran a social media campaign in autumn 2014 asking consumers to post original photos of Desderman Pure on Facebook, with winners receiving surprise reward packets worth €5 ($5.60). The campaign highlighted the solution's efficacy in protecting against norovirus transmission.

Germany: Leading OTC antiseptics & disinfectants brands 2015*

Octenisept 32%
Schülke & Mayr

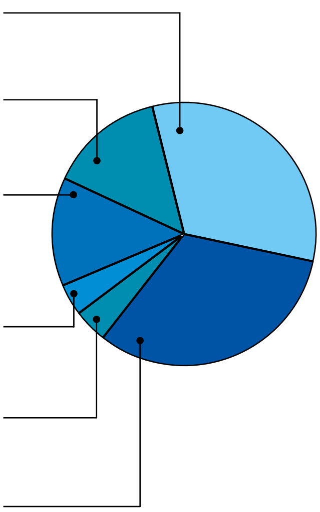
Betaisodona 14%
Mundipharma

Sterilium 13%
Bode-Chemie / Hartmann

Rivanol 4%
Dermapharm

Sagrotan 4%
RB

Others 32%



*Total value: €49mn / $55mn

No.2 entry Betaisodona (povidone iodine) fell by 2%, closely followed by Sterilium (+23%, internet sales +52%). The latter celebrated 50 years on the market in 2015, with sales helped by the rising number of companies and organisations ordering the product for hand disinfection inside their offices. Increasing anxieties over viruses including bird flu and norovirus between 2013 and 2015 may also have boosted brand turnover.

Rivanol (ethacridine lactate) followed at a distance, dropping by 9%, while Sagrotan (marketed elsewhere as Dettol) managed 7% growth. Q3 2014 TV ads backed the latter's No Touch dispenser, claiming that the gel kills 99.99% of bacteria. The majority of the umbrella brand's sales are generated through household disinfectants however, and so do not compete directly with other entries here. These received TV ad support throughout the reporting period, backing their efficacy in preventing the spread of germs.

A potential new challenger for leading entries in 2015/16 is Linoseptic, launched by Dr Wolff in H1 2015. Available as a colourless 30ml spray or 30g gel, Linoseptic uses octenidine and phenoxyethanol like leader Octenisept to disinfect wounds. The new brand received TV & print ad backing in spring 2015 (see above), carrying the tagline, "Darf in keine Hausapotheke fehlen" (Shouldn't be missing from any medicine cabinet), which also featured the blue cartoon character found in A+P for the marketer's Linola scalp treatments.

Wound healers: Private labels spoil the party

- Healthy growth for Multilind and Prontosan

Wound healers managed 2% growth, with positive performances from Top 5 entries slightly offset by the decline of private labels and a number of lower tier entries. Combined sales of Bepanthen Wund und Heilsalbe (wound and healing) and Bepanthen Narben (for scars) advanced by 3%, capturing around a third of category sales. Bayer backed the former through TV ads in H2 2014 featuring a man moving house who scratches his arm, carrying the tagline, "Auch für kleine Kratze, ganz gross" (Very big, even for small scratches).

Multilind (Stada) registered 6% growth (internet sales +14%), supported by spring 2015 print ads for the Wickelspray format carrying the tagline, "Windeldermatitis vorbeugen, Windeldermatitis heilen!" (Avoid nappy rash, heal nappy rash!). The majority of brand sales are generated by balm options for general wound healing (25g, 50g and 100g), formulated with nystatin and zinc oxide. Mirfulan (Recordati) for nappy rash advanced by 6%, aided by spring 2015 print ads reading, "Wunder Po? So haben Sie's schnell im Griff!" (Hurt backside? This way you'll have it sorted quickly!). The product carries an RRP of €12.48 ($13.97) for 100g of balm, similar to Multilind Wickelspray 100ml at €12.98 ($14.53). Kamillosan (Meda, chamomile) grew by 1%, while B Braun's Prontosan managed 12% growth just outside the Top 5. Positioned for wounds and burns, the product carries a relatively ethical profile, with little A+P backing.

Wart & verruca: EndWarts steals the show

- Meda adds a pen format to its dynamic entry

Wart & verruca treatments registered flat sales, with a strong performance from No.3 brand EndWarts (Meda) offset by the decline of leading entries Wartner and Clabin, both marketed by Omega Pharma / Perrigo.

Wartner fell by 9%, with both its cryogenic applicator and pen format (trichloroacetic acid) suffering losses. The brand still captured over a quarter of category sales, backed by spring 2015 print ads with the tagline, "Warze nur 1x vereist… Ciao Warze!" (Froze the wart just once… Bye bye wart!). Clabin (salicylic acid and lactic acid) followed at a distance, falling by 3% owing possibly to competition from EndWarts (formic acid), which grew by 29%. Meda extended the brand in spring 2015 through EndWarts pen (see above), registered as a medical device and said to provide 30 applications, with around five enough to dry out warts. The brand's 3ml solution grew strongly, possibly cannibalising sales of the 5ml option.

Italy

Antiseptics & disinfectants: Betadine stands alone

- Stable revenue for Neomercurocromo and Euclorina

Antiseptics & disinfectants fell by high single digits, with healthy growth from Betadine (Meda for Mundipharma) offset by the decline of lower-tier entries. Many consumers may be turning away from liquid products in pharmacies and supermarkets and using plasters and homemade alcoholic solutions instead. Advancing by high single

Betadine leads by a clear margin

digits, Betadine contributed over a quarter of category sales. The povidone iodine brand was acknowledged on emergency-live.com.it in December 2014 as an ideal solution to take on excursions into remote or isolated spots, such as on camping trips.

Neomercurocromo (SIT) managed flat sales and was seen on TV in summer 2014, with ads highlighting efficacy in disinfecting wounds, scars and burns. The line-up features two solution formats formulated with eosin, chloroxylenol and glycol propylene, as well as two Bianco options with chlorhexidine, sold as a 20g powder and 30g balm. Bracco's Euclorina also registered stable revenue, while Bialcol (GSK) managed single-digit growth. There was relatively little A+P for the latter, although it did receive recommendation on blogs for mothers in autumn 2014, with consumers backing its ability to maintain bodily hygiene of infants.

Wound healers: Connettivina leads the way

- Bepanthenol Extra Protezione launched

Wound healers built modestly on their 2013/14 performance, advancing by low single digits over the reporting period. Connettivina (Fidia, hyaluronic acid) grew at well above the category average, backed by spring 2015 TV ads underlining the efficacy of the brand's various options, including spray, gel, cream and gauzes. Print ads in Q3 2015 highlighting its ability to help heal burns and superficial wounds suffered by children could boost sales further in 2015/16. The marketer discontinued its 5-count 20cm x 30cm gauze format of Connettivina Plus in June 2015.

TV ads for Connettivina carry the tagline, "Amici per la pelle" (Friends for the skin)

SOP-registered Fitostimoline (Damor) fell slightly, although it fared better than medical device Kutecur (Pool Pharma, silver spray and aloe vera). Kutecur enjoyed print ad support throughout the reporting period backing its efficacy, although the product's price of €14.90 ($16.68) for 125ml may be putting off cost-conscious consumers. A smaller size for consumers looking to treat immediate cuts or burns could help boost future turnover.

Fielded under L'Oréal's La Roche-Posay banner, Cicaplast fell by mid-single digits, although the brand is strongly positioned for irritated, red skin, often in conjunction with acne, and therefore does not compete directly with other entries here. In March 2015, Bayer introduced Bepanthenol Extra Protezione to protect infants' skin in the first 12 months of life from urine and faecal bacteria, as well as friction from the nappy rubbing. Formulated with olive oil and vitamin B3, among other ingredients, the product is recommended to be used with every nappy change. The product enjoyed TV ad support carrying the tagline, "Per I primi mesi" (For the first months).

Wart & verruca: Strong year for salicylic acid entries

- Verrukill enjoys TV backing

The modest wart & verruca category grew by mid-single digits, helped by an above-average sales increase for leader Trans-Ver-Sal (Difa Cooper) and Duofilm (Stiefel / GSK). The former's SOP-registered patches are formulated with salicylic acid and received recommendations on online forums in Q2 2015, underlining efficacy.

Cryogenic remedy Wartner (Omega Pharma / Perrigo) recorded flat sales, while Duofilm (salicylic acid and lactic acid) grew by double digits. Available as a 15ml solution only, Duofilm's RRP of €12.90 ($14.44) may have boosted sales, compared to the €15 ($16.79) price tag for the Wartner 1.5ml pen, or €24.50 ($27.42) for its 50ml spray. Verrukill (Sixtus for Bouty) advanced modestly, although summer 2015 TV ads for the cryogenic spray carrying the tagline, "… E via le verruche" (… And the verrucas disappear), may boost sales further in 2015/16.

Poland

Antiseptics & disinfectants: Schülke & Mayr No.1

- Linoseptic granted marketing authorisation

Category sales increased by 7%, although leading options found growth hard to come by. Octenisept (Schülke & Mayr, octenidine and phenoxyethanol) leads the rankings by a clear margin, garnering close to half of total category sales. Brand performance was impacted by strong growth of lower-cost parallel import versions from InPharm.

Borasol (Prolab; boric acid; -3% value, +0% volume) is the No.2 option, although sits a distance behind the leader, capturing 4% of category sales, while stablemate Rivanol (ethacridine lactate) rounds out the Top 5. Rivel gel and Rivanolum VP soluble tablets (PharmaSwiss / Valeant, both ethacridine lactate) sit slightly ahead of Rivanol, although sales of both fell by double digits, with volume sales falling at a faster pace than values.

In August 2015, Dr August Wolff's Linoseptic spray (octenidine 1mg / g and phenoxyethanol 20mg / g; 30ml and 100ml) and gel (octenidine 1mg / g and phenoxyethanol 10mg / g; 30g) for topical use were granted marketing authorisation, although these are yet to launch.

Wound healers: Bepanthen climbs to the No.2 spot

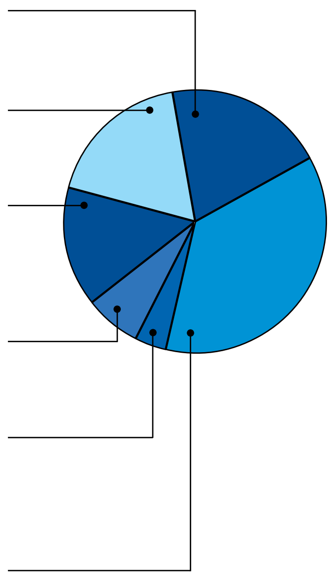
- Local player Unia leads

The category topline expanded by 6%, driven by double-digit growth for Bepanthen, which now claims the No.2 spot (18% share). Brand sales grew by 34% (+30% volume), with Sensiderm (for dry skin and eczema) and Baby Masc Ochronna (for infants aged 0-3 years) the fastest-growing versions. Bayer extended the line with Bepanthen Baby Extra Masc Ochronna (protective ointment) in April 2015, which is claimed to offer better protection of baby's skin in the first 12 months of life via a formula of olive oil and vitamins B3 and B5, among other ingredients. The ointment is claimed to neutralise faecal enzymes. TV ads carry the tagline, "Ochrona w pierwszych miesiacach" (Protection in the first months). Meanwhile, the marketer continued to invest in promotion for Bepanthen Eye drops (not tracked here).

Local player Unia continues to lead the rankings via Alantan (allantoin), available in core and Plus options. The latter contains additional dexpanthenol and was the best-performing version, boosted by frequent press ads stressing efficacy against skin inflammation, irritation and itching. Core Alantan is positioned as a general wound healer, while Alantan Plus is specifically positioned for infants. Unia also fields cosmetic line Alantan Dermoline.

Sudocrem rounded out the Top 3 and advanced at the category average, while sales may be boosted by print ads in summer 2015 stressing that it provides effective and safe relief from nappy rash.

Poland: Leading OTC wound healers brands 2015*



*Total value: €21mn / $23mn

There was little development elsewhere in the rankings, with no significant advertising in the reporting period. In October 2014, Amara launched Rinozine cream, which is positioned to moisturise and regenerate dry skin around the nose when suffering from a cold. The cream contains hyaluronic acid, vitamin A and dexpanthenol and the marketer extended the brand in July 2015 with saline nasal sprays under the same name (not tracked here). Meanwhile, Verco rolled out Sutricon gel (15ml) in January 2015, which is positioned to reduce the appearance of, brighten and smooth scars via its silicone formula. This joined a patch version.

Wart & verruca: Category can't maintain strong growth

- Wartix increases strongly

Following very strong growth in 2013/14, the category could not maintain its strong performance, and the modest topline fell by 11%, with the Top 3 entries following this trend.

Brodacid (Grupa Inco, lactic acid and salicylic acid), Undofen (Omega Pharma / Perrigo) and Scholl Spray do usuwania kurzajek i brodawek (RB, Spray to remove warts & verrucas) lead the rankings and generate half of the category topline combined, although there was little A+P support. Omega Pharma and RB invested in promotion for other options in the long-line Undofen and Scholl ranges.

The star performer was Wartix cryotherapy treatment (Genexo), which increased by 48% (+56% volume). Registered as a medical device, the brand is promoted via TV ads stressing safety and efficacy, highlighting that one application is enough to get rid of a wart, while brand website nakurzajki.com.pl (for warts) features info on how to treat and prevent warts.

Russia

Antiseptics & disinfectants: Category grows

- Generics no match for Myramistin

Antiseptics & disinfectants grew by 45%, with generic treatments no match for category leader Myramistin (Infamed), which advanced by an impressive 67% (+26% volume). According to online pharmacy portal pharmadata.ru, the brand was No.1 in value purchases made through the site in August 2015, and Myramistin continues to be positioned and recognised as a universal treatment and preventive option, reinforced through summer 2014 TV advertising campaign which shows a man on a mission to destroy infection.

Local generics dominated the rest of the category, with Oblovenie one of the leading players. Its potassium permanganate soluble powder for topical solution (3g, 5g and 15g packs) increased by 38% (+26% volume) to garner a 4% category share. This was despite consumer confusion about its OTC status after the Ministry of Health's summer 2014 decision to make the product Rx when in higher concentrations and ordered in monthly bulk quantities. The generic has been in use in Russia for several years, and is a popular household staple.

TV ads for Myramistin state: "Prevent and destroy!"

Sales of Obnovlenie's iodine generic (3% category share) more than doubled, while Tula Pharmaceutical Factory's boric acid offering (also 3% of the topline) advanced by 25%, although this was the result of price rises, with volumes falling by 5%. Another brand of note is Betadine (Egis / Servier for Mundipharma, povidone-iodine), which recorded organic 23% growth. Its modest 3% share of category sales proves no real threat to leading brand Myramistin however.

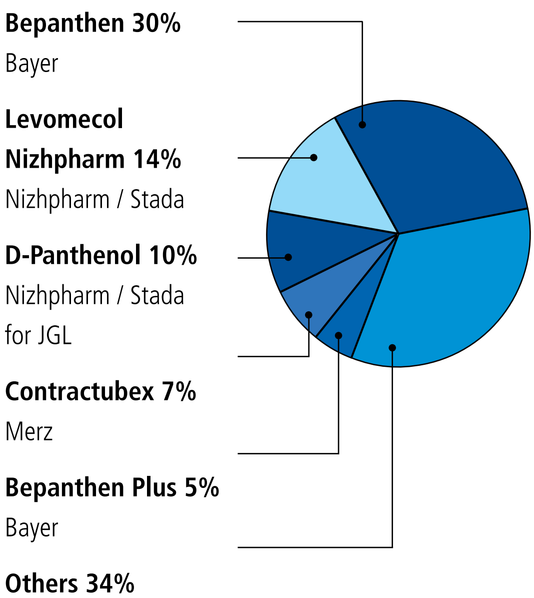
Wound healers: Double-digit growth

- **Bepanthen still ahead**

Bayer continues to lead the rankings via Bepanthen, with core (dexpanthenol) and Plus (dexpanthenol and chlorhexidine) options generating around a third of category sales. The latter was the best-performing version, growing by 27% (+8% volume), while double-digit value growth for core Bepanthen was largely inflationary.

A TV & print ad campaign for Bepanthen Plus in summer 2015 may boost brand sales further. Ads show a mother

Russia: Leading OTC wound healers brands 2015*



*Total value: €59mn / $67mn

D-Panthenol was the best performer among the Top 5

applying the cream to her son's grazed knee and carry the tagline, "Make summer easy with Bepanthen Plus". Meanwhile, print ads for core Bepanthen ran throughout the reporting period and stressed efficacy against nappy rash, carrying the tagline, "With love for your skin".

Nizhpharm's Levomecol generic, which contains the antibiotic chloramphenicol methyluracil, grew by 17% (+1% volume), while stablemate D-Panthenol (marketed by Nizhpharm for JGL) increased by 29% (+4% volume). The latter earned praise for its anti-ageing effects, although some consumers noted that the solid consistency of the ointment makes application difficult. Top 5 brand Contractubex (+23% value, +1% volume), is claimed by Merz to be the "No.1 treatment for scars", although the brand receives mixed reviews on online forums, with consumers citing its high price and questioning efficacy against older scars.

Mid-tier entry Solcoseryl (Meda) registered growth of 65% (+32% volume), and Panthenol Spray (Chauvin Ankerpharm / Valeant) advanced by 36% (+30% volume). Meanwhile, Argosulfan (Jelfa / Valeant) increased by 19% (+6% volume), boosted by TV and online ad support demonstrating that children are adventurous and can often suffer minor cuts, scrapes and bruises. Formulated with sulfathiazole silver 2%, promotion used the tagline, "Bruises heal. Memories remain. The silver won't fail – the wound will heal quickly".

Mid-tier entry Radevit Active (Retinoidy) celebrates its 20-year anniversary in 2015 and recorded double-digit growth in the reporting period, boosted by print ads stressing that it moisturises and protects skin via its formula of vitamins A, D and E. Elsewhere, the rankings are made up of a mix of branded and generic options, with the majority recording inflationary growth.

Spain

Antiseptics & disinfectants: Cristalmina performs strongly

- Salvat tours pharmacies

Sales advanced by single digits, with most brands declining, although second ranking Cristalmina (Salvat, chlorhexidine) bucked this trend and advanced rapidly. Salvat toured Spanish pharmacies in H1 2015 to offer information on antiseptics & disinfectants to HCPs and promote Cristalmina, stressing its speed of action, superior efficacy and safety. The brand generates around a third of category sales.

No.1 brand, Betadine (Meda for Mundipharma, povidone-iodine) has a 50-year heritage in Spain and generated almost 45% the category in value terms, but sales declined by single digits in the face of strong competition from Cristalmina. It is available in solution and gel formats. Linitul (Bama-Geve / Alfa Wassermann) claimed a 5% share and is available in dressing and ointment versions.

Wound healers: Marketers target hospitals and pharmacies

- Blastoestimulina extended

Sales of wound healers were flat following a mixed performance among leading brands. No.1 entry Blastoestimulina (Almirall) was extended with Blastofilm and Blastouronic in October 2014 (see right). Blastofilm is a liquid bandage formulated with Filmogel technology, claimed to promote healing of wounds, prevent their reopening and protect from external irritants and UV rays (SPF20). Meanwhile, Blastouronic cream contains hyaluronic acid, BioEcolia, allantoin and glycerin, and is claimed to repair the epidermis and improve the superficial appearance of skin. The Blasto range claimed a 12% category share.

Mitosyl (Sanofi) claimed a 9% share. The brand includes a wide range of SKUs including nappy rash treatments, teething balm, arnica gel for bumps and bruises, emollient cream, cradle cap gel and calamine lotion (only the nappy rash treatments are included in our topline). The brand was also extended with Mitosyl Tri-active – a paediatric lotion for dry and atopic skin – and a sunscreen for children and babies in early 2015 (these are not included in our topline). Mitosyl collaborated with the Fundacion Theodora in early 2015 to give hospitalised children a visit from a "Smile Doctor" (a professional artist whose aim it is to entertain and reduce emotional stress in children staying in hospital). As part of this promotion, packs of Mitosyl Pomada Protectora (protective cream) were sold with a red clown nose.

Nappy rash treatments E45 Lutsine Eryplast (RB) and Nutracel (Isdin / Esteve) both claimed an 8% share, although each declined. Cicalfate (Pierre Fabre; 6% share) performed better. Positioned for general skin repair, it is marketed under the Avène banner.

Kneipp launched Hartmann's Pupo-Gel (see right) in May 2015, an extension to the DermaActive wound healer range. The gel is formulated with aloe vera, shea butter and witch hazel to soothe and moisturise irritated skin in infants and children following bruising, sunburn or insect bites. To coincide with the launch, the brand Facebook page featured a competition for children to draw the Pupo brand mascot, with winning entries receiving a family experience worth €160 ($179).

Wart & verruca: Strong growth

- Cryotherapy options popular

Wart & verruca treatments advanced by double digits, fuelled by strong growth of the category leader, Cryopharma by Wartner (Omega Pharma / Perrigo). This garners around a third of category sales and is popular owing to its fast action. It is also available in a pen containing trichloroacetic acid. Antiverrugas Isdin solution (Isdin / Esteve, salicylic acid and lactic acid) claimed 29% of the topline, although sales were largely flat.

Verrupatch (Viñas; salicylic acid) and Urgo Verrugas (Urgo, see left) each account for 9% of category revenue. Sales of the former were flat, while Urgo's cryotherapy option increased by double digits, boosted by strong efficacy claims.

UK

Antiseptics & disinfectants: Dual Action for Savlon

- Sales steady

A flat result for antiseptics & disinfectants was an improvement on the previous reporting period. There is little consumer marketing here, with the few branded options well established on the market as first aid treatments. Dettol (RB) and Savlon (GSK) are the leading brands, both generating around 30% of the topline, growing by 1% and 2% respectively. Consumer recognition of Dettol is maintained by regular TV and online ads for the wider brand range, which includes a number of household cleaning products. Savlon is available in multiple treatment formats, with the majority of sales generated by the cream version. At the time of writing, Savlon Dual Action (20g gel) is rolling out, which is a rebranded version of Savlon Bites & Stings. The dry spray version grew by over 70% after distribution levels returned to normal following shortages in 2013, however this was partially offset by a large decline for antiseptic liquid, which has been discontinued.

Banner ads on boots.com highlight the anaesthetic and antiseptic action of Savlon Dual Action

TCP liquid (Omega Pharma / Perrigo) and Germoline cream (Bayer) both garnered around 10% of the topline; the former managed 4% growth, perhaps aided by lower stocking of Savlon liquid.

Wound healers: Sudocrem leads

- Remescar gets celebrity endorsement

Total sales grew by 14% in the reporting period. Nappy rash treatments account for the great majority of our wound healers topline; Sudocrem is the dominant brand by revenue, claiming a share of over 50%. The antiseptic healing cream version is a household name as a nappy rash treatment, garnering the vast majority of brand sales, however the main growth driver is Care & Protect barrier cream (launched in 2013). This is the primary focus of A+P on both TV, print and on the brand Facebook page.

Social media is a key marketing tool, with regular updates keeping mothers in touch with brand activity, such as

"Fabulous Friday Freebies" product giveaways and the Night Owl cartoon pun competition, which sees cartoon picture puzzles uploaded during the night to entertain mothers who are awake with their children, with the winners receiving a product bundle.

Bepanthen grew by single digits. Packaging for the Nappy Care Ointment has been updated with a flip cap and is now more squeezable to enable one-handed use while changing a baby's nappy. This development is being promoted on the brand Facebook page at the time of writing, including a link to a positive review from a mummy blogger. In July 2015, Bayer announced the launch of a £2mn (€2.7mn / $3.1mn) TV campaign running for 3 months to coincide with the brand's 70-year anniversary.

Metanium continued its advance from the lower tier, growing by 15%. The core nappy rash ointment grew by 10%, but the best performer remained the Everyday barrier line, which was extended with a spray format in autumn 2014. In the first aid segment, Acriflex burn treatment (cream and cooling gel formats) advanced strongly from a modest base.

UK: Leading OTC wound healers brand shares 2015*

Sudocrem 56%
Forest Labs / Allergan

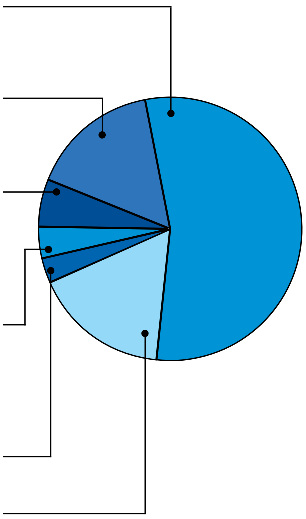
Bepanthen 16%
Bayer

Metanium 6%
Thornton & Ross / Stada

Acriflex 4%
Thornton & Ross / Stada

PLs 3%

Others 15%



*Total value: €49mn / $55mn

Sylphar introduced Remescar in spring 2014, available as a scar stick as well as versions to treat & prevent stretch marks and spider veins. UK philanthropist and TV presenter Katie Piper – who was left disfigured after an acid attack – became a spokesperson for the brand in summer 2015, with the announcement receiving a high level of attention in national print and online media. The brand is supported by frequent TV & print ads, although these focus on spider vein treatment option.

Katie Piper promotes the Remescar range

Wart & verruca: Strong growth for Scholl

- TV campaign boosts Wartie

A healthy increase in sales (+5%) was driven by the Scholl line-up (RB). Scholl Verruca Removal System is the leading brand version in sales terms, growing by 16%, but lower-tier stablemate Seal & Heal gel recorded the best result (+68%).

Established leader Bazuka (Dendron / DDD) advanced in line with the category average. Regular ads in the trade press remind pharmacists to recommend the treatment range, while consumer activity has featured children on a playpark roundabout next to the text: "Treat verrucas and warts or they can go around and around and …".

Sales of Wartie (YouMedical, acquired by Trimb healthcare in September 2015) more than doubled in the reporting period, rising to a 3% category share. TV ads emphasise that the product can treat warts & verrucas in "a matter of seconds" with just one application, showing a parent applying the pen applicator to a child's hand before allowing them to run off and play.