

Quickview

Unlocking Global Category Success in Consumer Health

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Introduction

In today’s rapidly evolving consumer health industry, understanding and leveraging category dynamics is crucial to not only grow existing brands, but to also take opportunities that appear within categories.

But in an environment flooded with data, but short on insights, it can be tricky to access and invest in the right data and analyses to help build strategic plans that help address consumer and shopper needs, better understand the wants of retailers and customers, and grow a brand, business or category. Yet, frameworks exist that can guide strategic plans, and ensure not only return on investment but also a consistent flow of information to the long-term success and evolution of a business within an consumer health category.

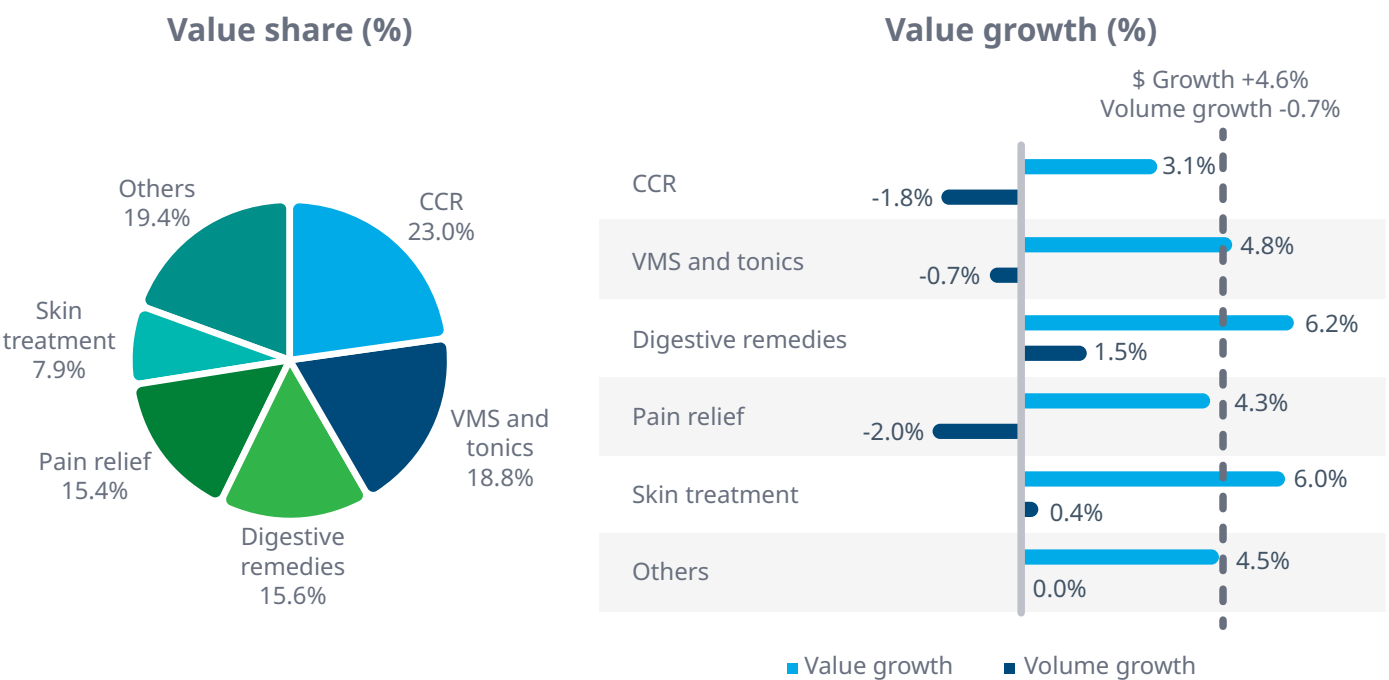
In this IQVIA Consumer Health QuickView we explore not only the market environment today, but also the frameworks that can drive category growth, and highlight how one brand — in a growing sub-category of the Digestives space — used in-depth data and analysis to overcome barriers to entry and succeed in a tricky healthcare area.

Market overview

Over the past few year, the global consumer health market has experienced fluctuations due to various factors, including the impact of COVID-19, supply chain challenges, and inflation (see Figure 1). Despite these hurdles, certain categories have shown resilience and

growth, such as digestive health and skin treatments, which have consistently driven volume growth, while by contrast the traditional big categories — such as cough, cold, and respiratory — have faced demand volatility.

Figure 1: Stronger growth in all key categories driven by digestive health (Global OTC category performance – MAT Q4 2024)



Source: IQVIA Global OTC Insights

The slowdown in market growth has been largely impacted by consumers pulling back on spending and lower cold and flu incidence levels, while manufacturer pricing has also played a role, with value growth coming in at just under 5%. However, volumes have been somewhat muted, with a poor cold and flu seasons having significantly impacted overall volumes, compounded by inflation and price increases since 2022. Consumers are feeling the impact on their wallets, leading to volume declines in five of the last seven quarters. Nevertheless, there has been some volume increase in the last six months of 2024.

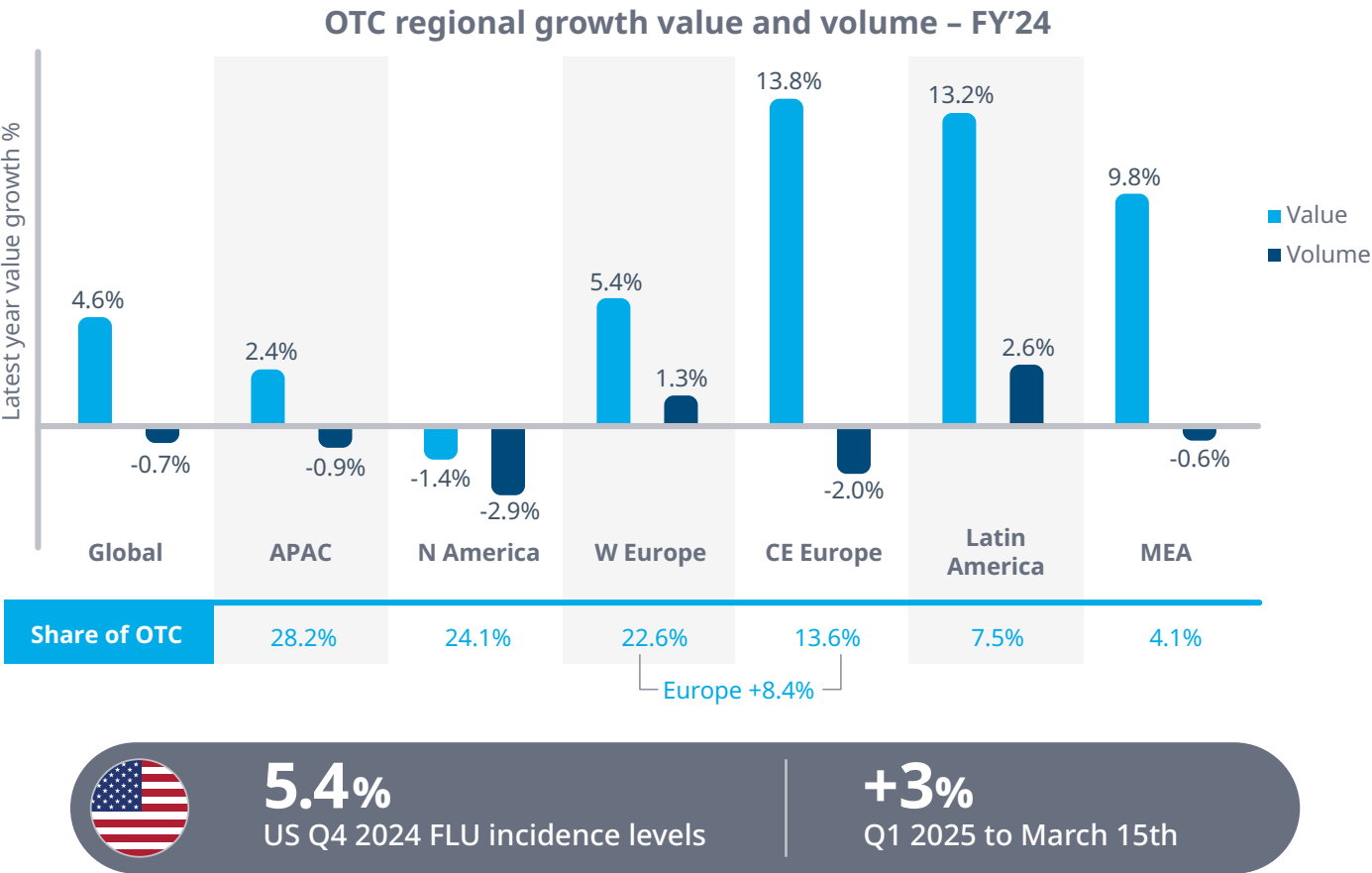
Regional insights

Regional performance varies significantly, with Western Europe and Latin America returning to volume growth, driven by strong second-half performance in 2024 (see Figure 2). By contrast, Central and Eastern Europe,

Turkey, and Latin America continue to grapple with high inflation and North America has seen a shift in consumer behavior towards cheaper channels.

In Western Europe and Latin America, the strong second-half performance in 2024 has led to volume growth. However, inflation remains relatively sticky in Central and Eastern Europe and Turkey, with inflation rates around 12% even without Turkey’s high inflation. Latin America also faces high inflation, with Argentina’s hyperinflation driving half of the price impact. In Asia Pacific, muted volume growth in China and volume declines in the Philippines and India have been observed, while in North America lower cold and flu incidence levels, combined with consumers feeling the pinch on their wallets, and significant channel shifts towards e-commerce platforms like Amazon has impacted growth.

Figure 2: W Europe and LATAM back in volume growth with higher inflationary impact persisting in CEE, MEA and LATAM (Global OTC region performance – MAT Q4 2024)



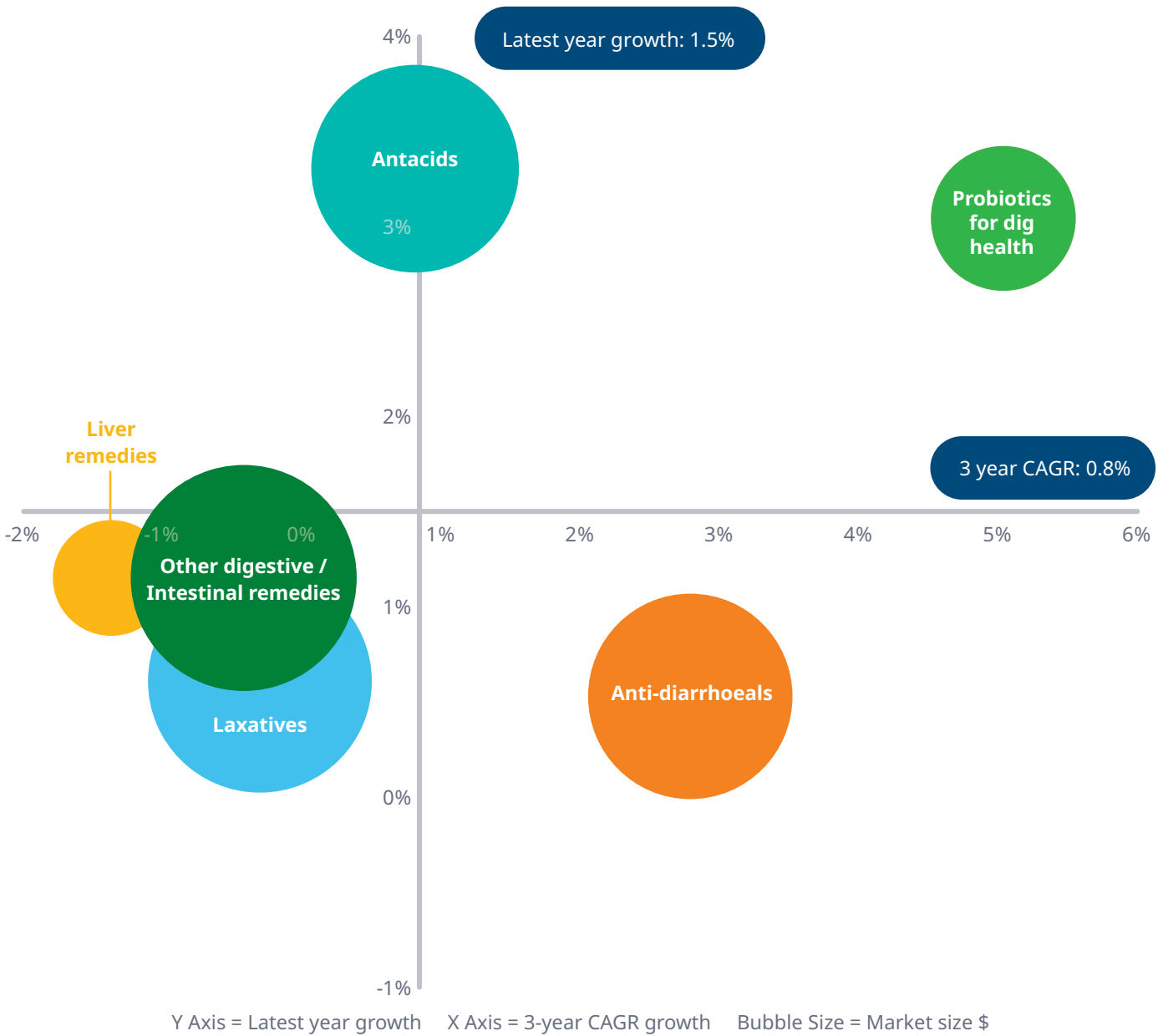
* USA slower year on year due to high cough, cold, flu performance 2023 , Q4 '24 incidence levels -5%
Source: IQVIA Global OTC Insights

Category dynamics

Digestive health has emerged as a consistent growth driver, showing resilience despite economic challenges, with the category’s success driven by increasing consumer awareness of gut health and the benefits of using products such as probiotics. Other categories, such as vitamins, minerals, and supplements (VMS), have also rebounded post-COVID.

It is in these non-traditional categories where opportunities are emerging. Taking Digestive health as an example, Probiotics have been outperforming the market for a while, but if you look at a sub-category such as laxatives (see Figure 3), there is a significant opportunity for growth in what is already a large category by value – especially as more products come on line for self-selection and consumers are educated by brands on the benefits of using a laxative safely when constipation arises.

Figure 3: Big opportunity in laxatives to drive further self-selection (MAT Q4 2024)



Source: IQVIA Global OTC Insights

Capitalizing on opportunity — a framework for success

To capitalize on these opportunities — especially in more niche sub-categories such as laxatives - adopting a comprehensive approach that integrates consumer insights, market data, and strategic planning is crucial. This involves not just understanding performance

data, but understanding consumer behavior, identifying key themes, and developing solutions that align with consumer needs, retailer objectives and pharmacists and other HCP expectations.



Leverage consumer insights

Conducting extensive research to understand consumer needs, behaviors, and barriers to treatment is crucial. This involves analyzing data from various sources, including market performance, macro environment trends, consumer and shopper behavior, and point-of-purchase interactions. By synthesizing this information, businesses can identify key themes and opportunities for their category.



Optimize e-commerce channels

Enhancing online presence by providing credible information and engaging content is essential. Utilizing search engine optimization (SEO) and social media can drive traffic and conversions. E-commerce platforms like Amazon have become significant channels for consumer health products, allowing consumers to research and purchase products discreetly.



Collaborate with retailers

Sharing insights and objectives with retail partners is vital to demonstrate the potential growth of the category. Developing joint strategies that address consumer pain points and improve the shopping experience can lead to mutual benefits.



Understand how to engage with HCPs

Recommendation from a pharmacist or other healthcare professional remains a key driver of sales, especially in sensitive categories or categories where consumer knowledge is limited. However, a number of shifting dynamics increasingly require HCP engagement models to evolve and embrace digital approaches as well as face-to-face visits. While many HCPs support remote engagement, today's representatives must work with a range of channels to optimise HCP success, experience and commercial impact. HCPs are humans, using technology and data to understand what information HCPs want, how they want it delivered and when is key to driving your product top-of-mind.



Innovate product offerings

Focusing on product innovation to meet evolving consumer needs is crucial. Investing in research and development to create solutions that address emerging health trends can drive category growth.



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Case study: Movicol

Movicol, a brand in the laxative category, serves as an excellent example of how consumer health businesses can drive category success. Tracy James, VP of Marketing Consumer Healthcare at Norgine, explains how her team successfully transitioned Movicol from prescription to OTC, addressing consumer needs and overcoming barriers to treatment:

Understanding consumer needs

Movicol's success began with extensive consumer research to understand the impact of constipation on people's lives. The research revealed that constipation can be highly debilitating, affecting both occasional and chronic sufferers. By identifying the barriers to treatment, such as the stigma around discussing constipation and the lack of understanding of how treatments work, Movicol was able to develop targeted strategies to address these issues.

Segmentation and targeting

A key component of Movicol's strategy was a robust segmentation study, which helped identify the target audience and their specific needs. This allowed Movicol to tailor its messaging and product offerings to resonate with consumers who were most likely to benefit from the OTC treatment.

Educational campaigns

Movicol launched educational campaigns to inform consumers about the benefits of its product and how it works. By providing credible information and addressing common misconceptions, Movicol was able to build trust and encourage consumers to choose its OTC treatment.

Retail collaboration

Movicol worked closely with retailers, including pharmacy, to ensure that its products were easily accessible and well-positioned on shelves. This included sharing shopper insights with

retailers and pharmacy to optimize shelf placement and signage, making it easier for consumers to find and purchase the product discreetly.

E-commerce strategy

Recognizing the growing importance of e-commerce, Movicol enhanced its online presence by providing detailed product information and engaging content on platforms like Amazon. This allowed consumers to research and purchase the product discreetly, further driving category growth.



Conclusion

Unlocking category success in consumer health requires a multifaceted approach that combines data-driven insights, strategic planning, and collaboration with key stakeholders. By understanding market dynamics and

leveraging consumer behavior, brand and category managers can drive growth and achieve long-term success in what is an increasingly competitive and busy market.

Key takeaways for the medical nutrition industry

01

Leverage consumer insights to drive targeted strategies

Conduct extensive research to understand consumer needs, behaviors, and barriers to treatment. Use this data to create tailored marketing campaigns that resonate with your audience. By identifying key themes and opportunities, businesses can develop solutions that align with retailer objectives and drive category growth.

02

Optimize e-commerce channels for enhanced consumer engagement

Enhance your online presence by providing credible information and engaging content. Utilize search engine optimization (SEO) and social media to drive traffic and conversions. E-commerce platforms like Amazon have become significant channels for consumer health products, allowing consumers to research and purchase products discreetly, so ensure your presence on these e-commerce platforms is well-managed, distinctive and up-to-date.

03

Collaborate with retailers and hcps to improve buying experience

Share insights and objectives with retail partners and HCP stakeholders to demonstrate the potential growth of the category. Develop joint strategies that address consumer pain points and improve the shopping experience by optimizing shelf placement, signage. Furthermore, by providing educational campaigns to retailers and HCPs enabling them to talk clearly and confidently to consumers about the product, the buying experience can be less stressful and significantly easier for the consumers.

About the authors



BRYAN GREENWAY
Associate Principal,
Consulting Services,
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Bryan Greenway has more than 20 Years of Commercial experience within the FMCG and Consumer Health Industries. He began his career in sales At Boots Healthcare International and then progressed in various Marketing roles at Reckitt Benckiser in South Africa.

He joined Bayer Consumer Health in 2000 in Operational Marketing in the UK. Thereafter he progressed into the Global Marketing organisation at Bayer Consumer Health, Switzerland in 2007. Following that he had various roles of increasing responsibility with Bayer in Sales, General Management and Marketing.

In 2022 Bryan joined IQVIA as Associate Principal in the Consumer Health Global Consulting team.



MATT STEWART
Associate Director,
Global Marketing,
IQVIA Consumer Health

Formerly editor of OTC bulletin — the business newsletter for the consumer healthcare industry and since October 2017 a part of the Informa group — Matt has over 15 years of experience covering all aspects of the consumer healthcare market from mergers and acquisitions to regulatory developments.

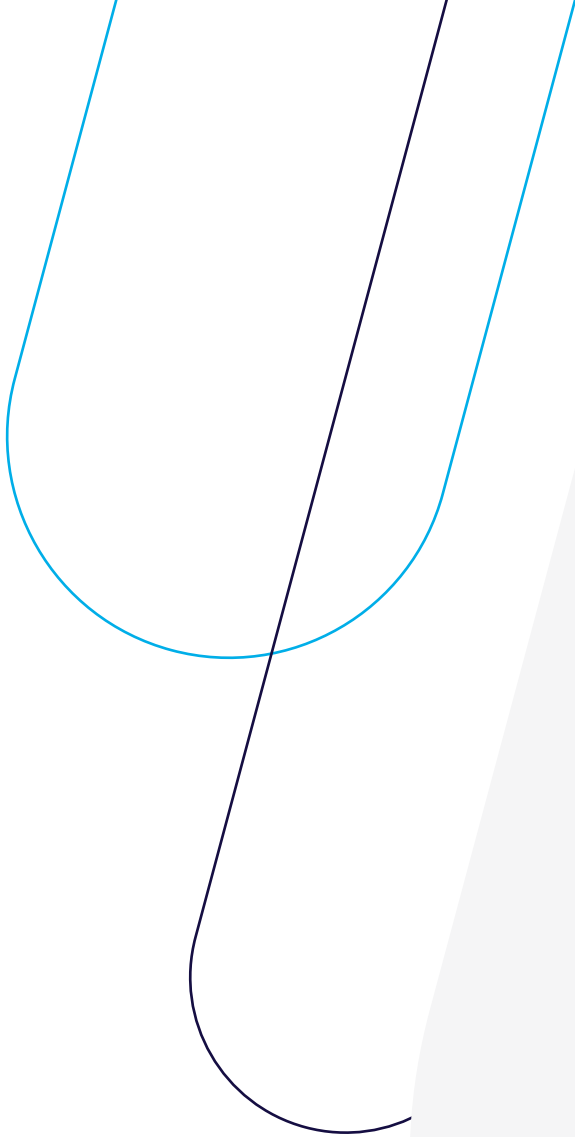
Matt is now responsible for content development and global content strategy at IQVIA Consumer Health.



MICHALA JARVIS
Category Director,
IQVIA Consumer Health

Michala heads up Category Management consultancy services for our clients – translating insights into category strategies and plans, enabling retailers and suppliers to work together to drive shopper satisfaction and category growth.

Michala has over 30 years of experience in commercial FMCG roles, specializing in category management and development with UK and International expertise. In her career she has worked on over 20 categories from baby food to Food to Go and Herbs & Spices to skincare and major retailers in the UK, Europe and Internationally including Tesco, Boots, Carrefour and Auchan.



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