



# The Rise of Women's Health: Innovation and Inspiration in Consumer Health

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## INTRODUCTION

Key findings

## THE RISE OF THE WOMEN'S HEALTH LIFECYCLE

Outside pregnancy/maternal care, life stages are almost absent in women's health marketing

Growth in marketing around life stages higher than overall women's health growth

Growing number of products tying life stages to discrete health benefits

Perimenopause benefits rise quickly from a small base

Perel re-energises the prenatal multi category with a more personalised approach

O Positiv extends range of supplements across women's life stages

Femtech presents a deeper layer for more targeted solutions across women's life stages

Elektra Health balances telemedicine with education and support to navigate menopause

## THE RISE OF THE WOMEN'S HEALTH LIFE CYCLE

Implications of women's life cycle analysis

## HEALTH BENEFITS AND WOMEN'S HEALTH

Explicit health benefits represent a similarly small market as life stages

Growth in benefits considerably outpaces overall women's health

Combination health benefits increasingly prominent in women's health

Tried-and-true ingredients dominate women's health, but others catching up rapidly

How to connect pain management with women's health

Rx-to-OTC switches and women's health reorientate women's sexual health category

Implications of women's health benefit analysis

## EVALUATING EXISTING WOMEN'S HEALTH CONSIDERATIONS

Women are already addressing health concerns with consumer health solutions

Women's health approaches have space to improve

Many of women's current health concerns are underrepresented in consumer health

Women's health concerns outstrip men's in several areas

Health concerns change dramatically as women age

Implications of women's health survey responses

## WOMEN'S HEALTH ACROSS MARKETS

Women's health products are evenly split across Asia, North America and Europe

Women's health growing fast across global markets

The US has a balanced, dynamic women's health marketplace

Nabi directly markets to the emerging perimenopause community

China's women's health marketplace is driven by beauty/skin health

Bloomage Biotech leads a new crop of beauty-from-within products in China

Probiotics drive women's health in South Korea

Rael Health sees dramatic growth behind a holistic approach to menstruation

Europe continues to underutilise dietary supplements, but the tide is changing

Free Soul uses targeted life cycle marketing to attract consumers to nutritional blends

Implications of women's health cross-border analysis

## EUROMONITOR'S WOMEN'S HEALTH FRAMEWORK

Revisiting the Women's Health Framework

## EUROMONITOR'S WOMEN'S HEALTH FRAMEWORK

Deepening the Women's Health Framework around consumer health

The Women's Health Framework's implications on consumer health strategy

## WHERE WOMEN'S HEALTH IS HEADING

Projection 1: Women's health to enter a period of consolidation

Projection 2: offering a total solution to comprehensively address common considerations

Projection 3: Women's health will live or die by point-of-sale retail simplicity

Projection 4: Femtech will advance in through tactical partnerships

Transforming Women's Health: How to win

Evolution of Women's Health

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