

Thursday 27 January 2022

2021: a renewed trust in selfcare products and an evidence of their importance for the French healthcare system

Nères presents the results of the 2021 barometer of selfcare products sold in community pharmacies carried out in collaboration with OpenHealth Company.

These products play an essential role in the everyday health of the French people and 2021 surely confirms this observation. After a difficult and disrupted year in 2020 due to the health crisis, the year 2021 has been driven by two phenomena:

- The expansion of community pharmacists' missions, which has largely contributed to an increase in the number of visits to community pharmacies;
- The growth of selfcare products: +7.1%. Driven in particular by innovation, this market is a key activity for all pharmacies, whatever their size, and plays an essential role in the French healthcare system of today and tomorrow.

Between trends and innovation: selfcare products market on the rise

Although the French people have never stopped going to community pharmacies, purchases had slowed down in 2020. In 2021, the market has recovered and has seen a good dynamic. With a 7.1% growth in the selfcare market, 2021 has been an exceptional year.

While all types of selfcare products grew in 2021, food supplements (+10.4%) and selfcare medical devices (+15.3%) have concentrated the growth which was mainly driven by demand.

For the first time, OTC medicines represent less than 50% of selfcare products market.

This development was expected, given the trends observed in recent years, and can be explained by two factors in particular:

- On the one hand, the French people have been increasingly focusing on prevention (particularly represented in selfcare medical devices and food supplements). Thus, 39.3% of selfcare products sold in community pharmacies without a prescription in 2021 have a preventive purpose.
- On the other hand, the launch of numerous innovations, particularly in selfcare medical devices and food supplements:
 - o Thus, products launched since 2019 (such as thermometers and self-tests related to the pandemic) represent 34% of the selfcare medical devices market, which underlines the agility of the sector to adapt and respond quickly to emerging needs. In the food supplements segment, innovations represent 28.9% of the market;
 - o In contrast, new OTC medicines launched from 2019 onwards represent only 1.7% of the market. This figure is explained by a restrictive regulatory framework, particularly with regard to switches. Nères renews its proposals made in view of the presidential elections through its platform, to change this trend, to enable OTC medicines to help respond to the difficulties encountered by the French people in terms of access to general practitioners.

Pain, immunity, digestive... Each category has its own growth

While some categories have strongly sustained their growth already observed in 2020, such as home care (+27.6% compared to 2020) or sleep/stress (+9.6% compared to 2020), others, such as immunity, which had experienced significant growth in 2020, have seen their momentum continued at a slower pace in 2021 (+3.2%).

In addition, 2021 saw the return of seasonal pathologies, particularly in winter. The increase in products related to the digestive / detox / transit system (+4.4% in value vs. 2020) and products related to the cough & cold (+7.4% in value) confirm this, after a year 2020 spared by these common ailments.

With 9.2% of pharmacy sales and a +7.1% increase in value, selfcare products purchased without a prescription therefore remain an important activity for the pharmacy economy, whatever its size.

**OTC medicines:
Return to growth**

The market is slowly recovering: +2.2% in value.

Three categories alone account for 54% of the market: pain, respiratory and digestive systems.

This positive performance is observed at the same time as a significant drop of OTC medicines prescribed by a GP (-6,1 %).

**Food supplements
Strong growth**

They experienced a significant growth in 2021 with +10.1%.

Four categories account for 60% of the market: sleep/stress, digestive system, vitality and immunity.

For community pharmacies, they represent a real strategic choice and a growth lever.

**Selfcare medical devices –
great performance**

Home care, prevention with self-tests and first aid for the skin account for 67% of the market.

Covid effects (self-tests) but also significant trends (homecare) explain the exceptional performance of this sector, which recorded a +16.5% increase in value.

Selfcare products – a pillar of the French healthcare system

French people's confidence in having their pharmacist take care of their daily ailments was further strengthened in 2021.

With 27% of total pharmacy visits, visits for selfcare products purchased without a prescription reached 35 million more than in 2020, i.e. 305 million pharmacy interactions.

Based on an average pharmacy opening time of 11 hours, more than 21 people are served every second by pharmacies with selfcare products.

Every month, 25.1 million French people visit community pharmacies for selfcare products, with peaks of 27.5 million during the autumn and winter seasons, due to seasonal ailments.

If on weekdays, visits for selfcare products represent 27% of total visits, the proportion rises to 33% on Saturdays.

In 2021, patients have returned in part to large pharmacies (37% of visits), which in 2020 had been abandoned in favour of small and medium-sized pharmacies, these new habits of proximity persist (average 35% - small 28%).

Selfcare products are a key element in the practice of pharmacists, but also of doctors.

Indeed, in addition to 305.4 million visits for purchases of selfcare products without a prescription, 284.8 million additional pharmacy visits are generated in 2021 by a prescription that includes at least 1 selfcare product, including 87.6 million with a prescription that includes only selfcare products.

Thus, selfcare products are involved in almost 51.7% of all pharmacy visits.

2022, new perspectives for primary care health and prevention products?

These market figures demonstrate that the importance of selfcare products in the health of the French people. As the presidential elections approach, this finding is an opportunity for Nères to reaffirm the importance of these products and the need to put them at the heart of health policy. This is the objective of the measures proposed by the professional association on its platform. For Vincent Cotard, President of Nères, *"it is urgent that a political and strategic vision on our products is developed. This year's elections represent a major opportunity to enhance the visibility of the value of selfcare products and to finally recognise their contributions in the organisation of care today and tomorrow. Because beyond the health crisis, our health system continues to face medical deserts. Our industry and our products can make a major contribution to reducing disparities in access to healthcare; the pharmaceutical industry has the means to accompany a new era in healthcare, but it must be given the means to do so."*

About Nères

Nères is the French association that represents pharmaceutical companies producing and marketing selfcare products available in pharmacies (OTC medicines, selfcare medical devices and food supplements).