

# Haleon Plc in Consumer Health

March 2023

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Scope  
Executive summary

## STATE OF PLAY

Haleon Plc is the market leader in consumer health  
Haleon's global footprint  
Company overview

## EXPOSURE TO FUTURE GROWTH

US will lead more than half of future growth

## COMPETITIVE POSITIONING

Haleon leads, with Nestlé SA making some significant strides  
Fastest growing companies cluster in Asia and show strength in prevention categories  
Market leading positions in main markets propel Haleon's global lead  
Top brand Centrum still has potential to increase sales in leading markets

## ANALGESICS

Investment in Panadol results in strong growth in Middle East and Africa  
Voltaren maintains number one position in analgesics globally, thanks to growth in the US

## VITAMINS AND DIETARY SUPPLEMENTS

Balanced portfolio within vitamins and dietary supplements supports overall growth  
Strategic acquisitions in markets other than Asia Pacific and North America are necessary  
Caltrate dominates Haleon's dietary supplements sales  
China and the US will continue to be key growth markets over the forecast period  
Opportunity analysis: dietary supplements in Western Europe  
Through probiotic supplements, Haleon can offer holistic digestive health

## COUGH, COLD AND ALLERGY (HAY FEVER REMEDIES)

North America and Europe are the largest markets for Haleon in CCAs  
Decongestants and combination products dominate Haleon's CCA portfolio

## OTHER CATEGORIES

Losses by Nexium cancel out gains by Tums in North America  
Dermatological portfolio might benefit from further divestures  
A natural sleep aid brand with a wellness proposition can help Haleon make inroads

## KEY FINDINGS

Key findings

## APPENDIX

Projected company sales: FAQs (1)  
Projected company sales: FAQs (2)

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