

# Leading in a new landscape

Annual Review 2020



**PAGB**

The Consumer Healthcare Association

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# A message from PAGB's President

It's always hard to encapsulate in a few paragraphs the achievements of the PAGB team and our member companies over a single 12-month period. **How much tougher, though, when the year in question is 2020.**

COVID-19 and the UK's exit from the European Union were seismic events whose impact is still changing the landscape of our sector.

As an industry rooted in self care, we have always recognised and championed its benefits. Self care allows people to take more control over their own health and their own lives, at the same time as freeing up NHS resources for those who need them most.

The coronavirus pandemic has focused global attention on those benefits, as well as highlighting the importance - and the challenges - of maintaining access to effective and trusted self care products.

The UK's departure from the EU, meanwhile, continues to present regulatory and supply issues for us to address.

Faced with both COVID-19 and EU Exit, PAGB member companies rose admirably to the task of keeping OTC medicines,

medical devices and food supplements on the shelves. They worked tirelessly to ensure people could self care wherever possible and follow the 'stay at home' advice that underpinned the Government's response to the pandemic.

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***PAGB itself responded to COVID-19 in similar 'can-do' style, not missing a beat as every one of its functions and services for members was shifted into the virtual, home-working world.***

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And all of this at the very moment when the team was experiencing a different kind of change, as John Smith retired after five hugely successful years as PAGB Chief Executive and decades of service to the consumer healthcare industry.

On behalf of the PAGB board, member companies and John's colleagues, I'd like to thank him for the commitment, drive and vision he brought to PAGB during his tenure as CEO.

There is no doubt that he handed over the reins of an organisation in excellent shape, and I'm confident it will only go from strength to strength following the appointment of Michelle Riddalls to the helm.



Michelle's regulatory expertise has already reaped significant dividends, ensuring PAGB's voice is being heard at the highest levels of Government as we address complex issues affecting the industry – particularly those arising from EU exit.

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***Responding to the new post-EU exit framework will remain a priority area for PAGB as we work towards the clear goals set out in our strategy to 2025.***

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These include progress towards self-regulation and new pathways to reclassification – both facilitated by growing opportunities for agile and pragmatic regulatory oversight in the UK – along with a national strategy to empower more people to self care and greater use of digital technology to enhance consumer healthcare.

To those members, associate members and stakeholders who did so much in 2020 to support and enhance our work in these areas and more, thank you. We now have a unique opportunity, in the wake of COVID-19 and EU exit, to help shape the future not only of our industry but of self care as an integral part of the UK's healthcare system.



**Neil Lister**  
President, PAGB

*Neil Lister is Vice President International and Managing Director UK and Ireland at Perrigo Company plc*





# Reflections on a year to remember

Michelle Riddalls  
Chief Executive Officer, PAGB

If I had been asked to predict in January 2020 where PAGB might find itself at the end of the year, I could not possibly have factored in COVID-19 and its ramifications. Nor could I have known exactly how the UK would leave the EU – a process that was uncertain until the very end.

What I would have said, with absolute confidence, was that PAGB had a first-class team and a clear strategy. We were in a strong position to tackle whatever came our way, and ensure our voice would be heard.

And so it proved.

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*As the pandemic unfolded and EU exit loomed, our expertise and insight was called upon repeatedly.*

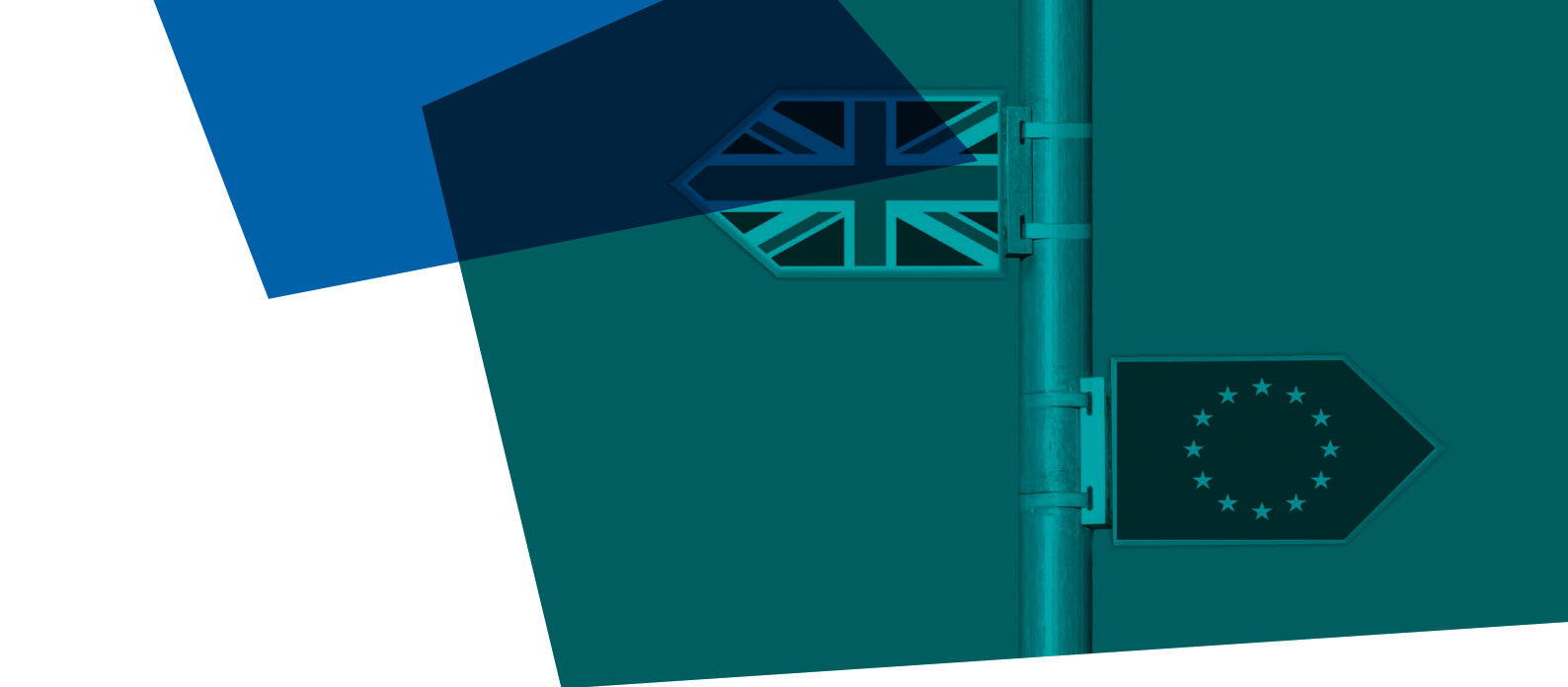
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When I stepped into the role of PAGB CEO just days after the start of the first lockdown, I was immediately grateful for a working lifetime steeped in regulatory affairs.

With OTC medicine supplies under pressure and in the spotlight, PAGB was invited to help address the issues involved. We worked with the MHRA to identify regulatory flexibilities that could be introduced to support the healthcare products supply chain and joined a coalition of industry bodies to submit a post-COVID-19 Recovery Roadmap to ministers.

As we approached the end of the EU exit transition period, it became clear that the Northern Ireland Protocol risked adversely affecting the supply of medicines to that part of the UK, if implemented as planned on 1 January 2021.

The concerns we raised with the Department of Health and Social Care were heard loud and clear and I was invited to co-chair a 'deep dive' group to explore the impact of the Protocol on supply routes into Northern Ireland. The subsequent announcement that the introduction of new medicines regulation arrangements in Northern Ireland would be postponed until January 2022 was a welcome relief, although this is a delay rather than a solution so the hard work continues to ensure that neither our member companies nor consumers are disadvantaged by the changes.



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***All of our achievements in 2020 were supported by a growing and high-performing team; we increased our advertising services capacity and brought on board new colleagues with responsibility for membership and media affairs.***

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We widened our net in other ways, too, welcoming 6 new members and 10 new associate members, as well as offering consultancy services to non-members for the first time.

Agility was at a premium everywhere in 2020 and at PAGB we drew on it in spades, moving events and training online and communicating quickly with members about fast-moving situations while maintaining our regular updates.

Despite the unexpected diversion of so many resources to the pandemic and EU exit, we launched projects to bring new areas of our sector into self-regulation and to give members more flexibility and accountability over their own advertising, which will continue into 2021.

The home-working experience forced on us by COVID-19 was a demonstration of just how much is now achievable online - an ideal reminder as we began work on our far-reaching and ongoing digital strategy.

In a nod to the changing times, we revised our articles of association to make provision for conducting PAGB's activities virtually; more traditionally, we finished the year in good financial shape.

So overall, in a year that was by any measure enormously difficult, there was much for PAGB to be positive about.

Thank you to each and every one of the PAGB team, our members and the many stakeholders with whom we worked so productively in 2020. I look forward to even greater successes in future.



**Michelle Riddalls**  
Chief Executive Officer, PAGB

# The consumer healthcare market in 2020

Vitaliy Zhyhun, Head of Analytics,  
Health, Beauty & Personal Care, NielsenIQ

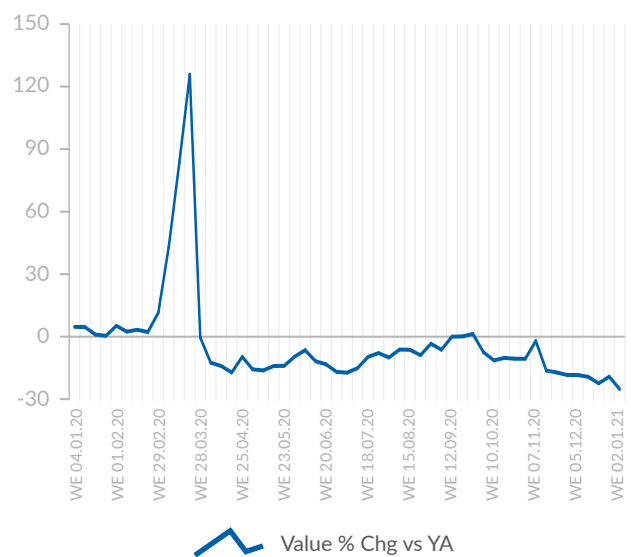
2020 was an unpredictable year to say the least, with the UK living the best part of it under local or national restrictions. As an analyst, I had the privilege of observing and crunching the data on a weekly basis.

The level of change was evident from day one, and the signs are that the impact of this pandemic on consumer behaviour will stay with us, quite possibly for a lifetime.

The broader Fast Moving Consumer Goods (FMCG) industry was one of the few to grow significantly in 2020. Growth accelerated to +6.6% in value terms – for context, in 2019 it was -0.4%. For this sector, the growth was extreme and is unlikely to be sustained at the same rate.

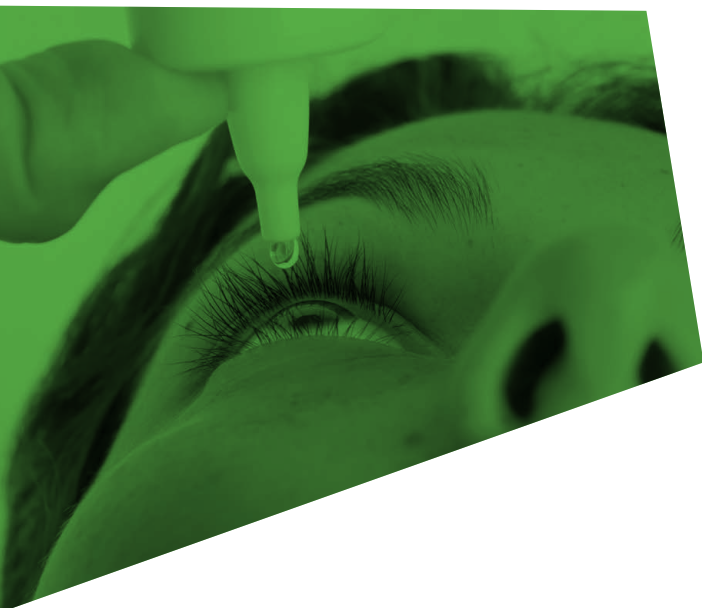
Key consumer behaviours shifted and while safety was at the forefront of people’s minds, health moved up the priority list. Consumers’ definition of health also widened to include wellbeing and nutrition, both in terms of healthy eating and supplementation. While this could be seen as a positive trend for the self care industry, it requires us to take a longer-term perspective.

Defined OTC categories - Total Coverage - Weekly % Change vs Year ago



**-4.1%**

In fact, 2020 was a tough year for consumer healthcare. Total OTC sales declined by -4.1% in value by December 2020 despite seeing +21.1% value growth in the first quarter of the year.



The impact of the global pandemic has revealed four key shifts in consumer behaviour that will shape the consumer healthcare industry as well as the wider FMCG sector going forward.

### Where consumers bought products



Business closures, ongoing restrictions and repeated lockdowns resulted in a higher spend online and the return of large store formats, or all-in-one-store shopping. This trend impacted all categories.

Traditional bricks-and-mortar retailers saw continuing growth in sales of consumer healthcare products via their online sites, achieving +76.3% in 2020 vs the year before.

**10%**

As an overall proportion, online sales in 2020 accounted for 10% of the category sales, the highest that we've seen.

The uplift in online sales started early but with more permanent working from home, and the added convenience of online shopping, this looks set to continue, although demand may be latent.

It will take time for the OTC industry to react to this shift, for shoppers to change their mindset and for retailers to create capacity.

### A shift in consumer rationale



Consumers' motivations to buy are changing and have a huge impact on what ends up in their shopping baskets and which stores are visited. Proactive health is one area where companies should focus to meet this new consumer need.

As a nation we aimed to visit fewer stores this year and this, combined with the decline in OTC sales, creates a long-term risk for the traditional pharmacy channel.

Now more than ever, shoppers need a clear and unique reason to visit the pharmacy.





## Economic impact on affordability



Economic pressures on consumers affect how much they are willing to spend on self care products. This particular period can't be compared to previous recessions, however, some recessionary behaviours have started to appear and are likely to continue, perhaps on a bigger scale.

Consumers look for value and opportunities to buy branded products at a discounted price by purchasing on promotion, buying a smaller pack or visiting a cheaper store. Private label brands may benefit from this too. However, trust in brands remains an important factor in sales of consumer healthcare products.

So far, the good news is that consumers stayed on the cautious side and trusted branded products performed better, as shown by brands in food and medicine gaining share and private label declining through 2020.



## What next?

At the end of 2020 we are faced with ongoing uncertainty and some big questions for the future: is this challenge to the traditional cold and flu season something that could become permanent and are there learnings for other categories? Most importantly, how can we meet consumers' changing needs and where is the greatest opportunity for self care during and beyond the pandemic?

## What went in the basket



In 2020, new norms became integrated in all walks of life, including people's buying habits. Priority was given to food and proactive self care, but limitations on social interactions had an impact on health and therefore on consumer healthcare.

A year which started with double-digit growth ended with double-digit decline, which accelerated towards the end of the year. Herein lies the conflict: health was top of people's minds and a public priority but sales of consumer healthcare products declined. Cold and flu products and vitamins are good examples to explain this paradox.

Measures brought in to curb the transmission of COVID-19, such as social distancing, lockdowns and mask wearing, combined with the uptake of flu vaccinations and a proactive focus on health, meant that we didn't experience a traditional cold and flu season in the UK.



As a result, sales of cold and flu products were down **-28.7%** year-on-year in value and **-27.6%** in units.

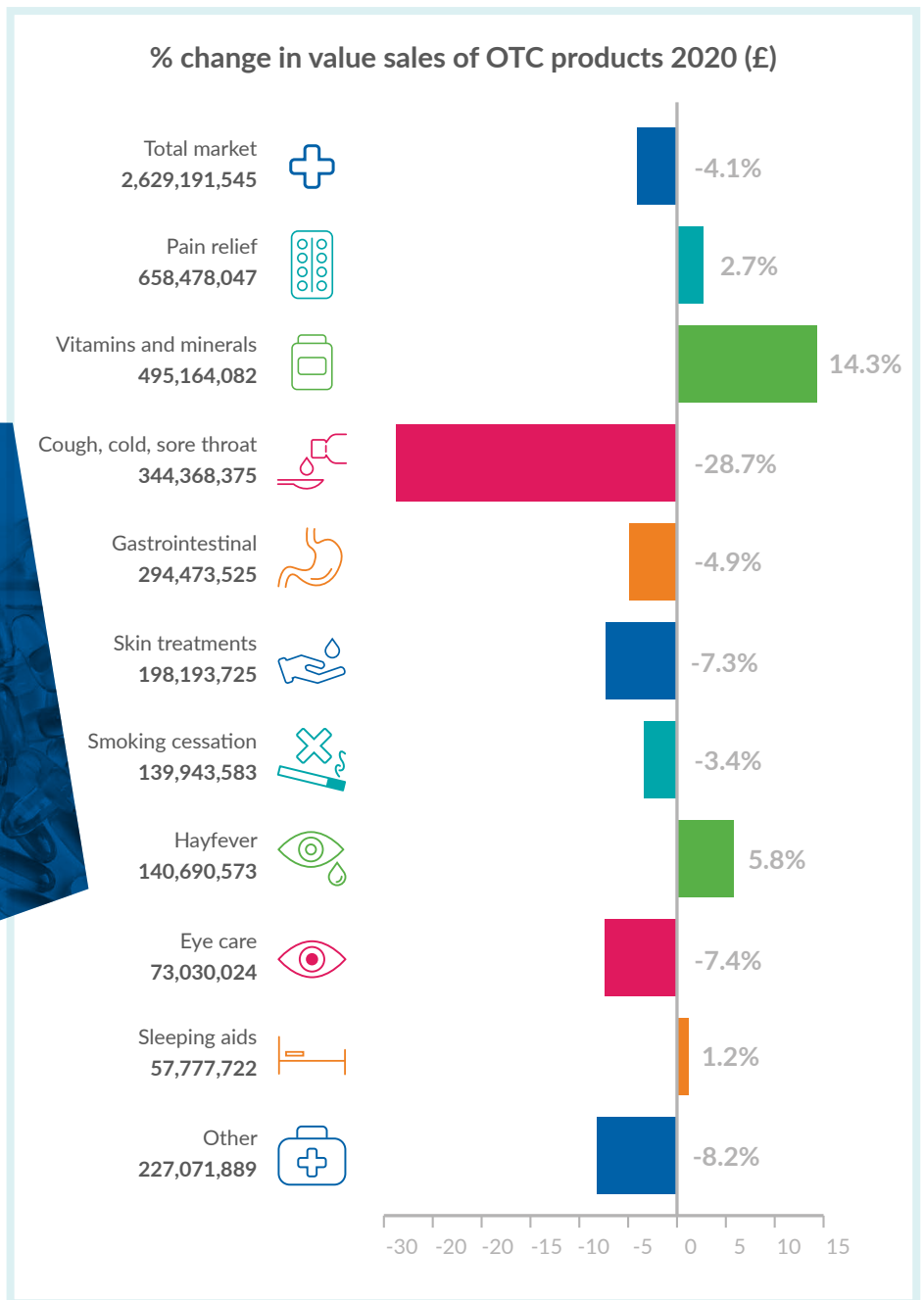


Conversely, vitamins benefited and grew **+14.3%** in value.



Source: NielsenIQ.  
Total Market MAT to WE 02.01.21

Nielsen's OTC read was defined by NielsenIQ in agreement with PAGB and its members. It covers over 75,000 stores, including multiple and independent chemists, grocery retailers and in-store pharmacies as well as impulse stores.



NielsenIQ (formerly known as Nielsen Global Connect) is a business unit of Nielsen holdings plc (NYSE: NLSN) a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. [www.niq.com](http://www.niq.com)

Data and insight referenced in this review is taken from Nielsen's different sources

Nielsen is an associate member of PAGB.

# Tackling the big issues of 2020

## COVID-19

The year was dominated by the global COVID-19 pandemic and the ensuing impact this had on individuals, business and governments the world over. For PAGB and its members, this meant more than a change in the way that we conduct business day to day.

From late March 2020 the UK public was instructed to stay home, protect the NHS and save lives.

During the first lockdown, fear of overwhelming the NHS kept people away from GPs and other health services. This, combined with advice to self care for coronavirus symptoms, meant that many OTC products were in high demand and the self care message became a core part of official health campaigns.

### Putting consumer healthcare on the Government's agenda

PAGB moved quickly to ensure the consumer healthcare voice was heard by ministers and officials tasked with managing the UK's response to the pandemic.

We worked with the MHRA and the Office for Life Sciences (OLS) to review proposed regulatory flexibilities for OTC products, advising on current and future impact for the industry and how such flexibilities could support the industry to meet consumer demand.

The global impact of the pandemic was also seen in disruptions to the supply of active ingredients from overseas. We actively supported the UK Government's efforts to secure continuity of supply for UK citizens.

In recognition of PAGB's key role in supporting self care, PAGB's CEO, Michelle Riddalls was invited to join the Life Sciences COVID Response Group led by government ministers Lord Bethell and Nadhim Zahawi MP. Michelle used this platform to ensure that OTC medicines and medical devices issues were heard at the highest level.

We joined other life sciences organisations in co-signing letters and statements in support of the sector. As a result of this cross-sector collaboration, PAGB was also able to ensure that self care was included in a Life Sciences Recovery Roadmap developed to support Government post-pandemic planning.



## Self care survey 2020

### COVID-19 accelerated NHS reform

The COVID-19 pandemic highlighted the importance of self care for managing symptoms and, crucially, reducing pressure on the NHS.

As the impact of the pandemic became clear, the NHS moved quickly to adopt new ways of working and embrace technology, making more progress in a few months than it had made in years. PAGB swiftly identified the potential for these positive improvements in NHS systems and digital acceleration.



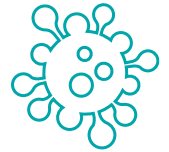
Our self care policy engagement in 2020 focused on embedding these positive changes to support self care during and beyond the pandemic.

PAGB's updated recommendations have gained support from across the health community – including NHS, pharmacy and healthcare professional bodies. We continued our work with these stakeholders to publish an updated clinical consensus on self care, which has proved valuable in discussions with key government and NHS stakeholders.

We published results of a major new survey showing how Covid-19 had affected people's attitudes to self care

**32%**

said the pandemic had changed their attitude to the way they access healthcare services



**71%**

of people will think twice about going to A&E for self-treatable conditions



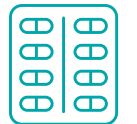
**51%**

are less likely to go to the GP first



**69%**

of people who might not have considered self care as their first option before the pandemic said they were more likely to do so in future



[Find out more.](#)



### Keeping members informed

A daily intelligence email from PAGB filtered and summarised relevant regulatory and government updates on COVID-19, enabling members to stay on top of a fast-moving situation.

PAGB also produced a short video which was shared with the Board and all our members on the activities that PAGB had undertaken during this time.

[Watch our video here.](#)



## Preparing for life outside the EU



An eleven-month transition period which began on 31 January 2020 was intended to provide institutions and businesses with time to prepare for life outside the EU. In reality, the repeated threat of this ending without a trade deal and the impact that this would have on the life sciences sector, continued a sustained period of uncertainty for our industry.

PAGB's priority was to reduce the impact of any regulatory divergence on the industry and on access to self care.

We worked closely with the MHRA, Department of Health and Social Care (DHSC) and the Office for Life Sciences (OLS) to ensure that the specific needs of OTC medicines and medical devices were taken into account when defining new regulatory requirements.

We held regular member meetings to define priorities and gather input through PAGB's EU Exit Group, Regulatory Affairs Group and a new Medical Devices EU Exit Taskforce, staying focused on members' priorities.

## EU Exit – our specialist subject

Our CEO, Michelle Riddalls, ensured that PAGB's expert voice was heard in high-level committees with officials, government ministers and trade association leaders:

→ Government Industry Advisory Group on Supply

→ The EU Relationship Group (EURG)



As a leading regulatory expert, Michelle was also invited to co-chair a series of Northern Ireland Protocol 'Deep Dive' meetings with the DHSC.

PAGB was instrumental in pushing the issue of supply to Northern Ireland up the agenda, including ensuring that retailers were brought into policy discussions.

As a result of this group's influence, the UK successfully negotiated a 12-month derogation with the EU, delaying the point from which Northern Ireland becomes subject to EU regulations governing medicines imports from Great Britain.

Following concerns raised by PAGB about retailers' readiness, we also worked with MHRA to produce Northern Ireland retailer guidance for both medicines and devices which was published in January 2021.

Our recognised regulatory expertise enabled us to contribute to the development of regulatory guidance that directly affects our members:

PAGB's regulatory team attended multiple meetings with the MHRA relating to its 'standstill guidance' on medicines and medical devices. We provided input to drafts, consolidated questions from industry and created a communications channel between our members and the regulator.

PAGB's medical devices EU Exit Taskforce updated key asks from the industry on future medical devices regulation at this formative stage in its development. We provided data and impact assessments which PAGB communicated to the MHRA, OLS and other government stakeholders.

We shared updates on the changing medical devices situation with our European colleagues in AESGP, including presenting on EU exit and medical devices at a conference organised by the German industry association, BAH.

On food supplements, PAGB collaborated with other trade associations to seek clarification on how the regulation of food and food supplements would change from 2021 including the impact on trade between GB and Northern Ireland.



## Supporting members



PAGB members received regular intelligence updates direct to their inbox, helping them stay on top of an evolving situation



We expanded our member resources online and provided a series of quick links to help navigate the complexity of the gov.uk website

Interpreting and understanding the implications of MHRA's standstill guidance became the team's top priority.



We held in-depth follow-up meetings with MHRA, OLS and DHSC, sharing feedback with members



We also collated all member questions into a Q&A resource online, keeping track of all MHRA's responses to share the latest information as soon as it was available



We produced detailed consolidated summaries of all relevant MHRA guidance relating to medicines and medical devices and decision trees to help members understand the MHRA standstill guidance relating to new applications and all aspects of ongoing maintenance for all licenced medicines



We visualised the different routes for medicines and medical devices supply to Northern Ireland, sharing this with the regulators and our members



## The final countdown

Political pundits' predictions that negotiations with the EU would go to the wire proved correct. By the time the UK and the EU reached a free trade agreement on 24 December 2020, PAGB had helped its members prepare for multiple possible outcomes.

It became increasingly evident during 2020 that the UK Government was in favour of divergence from EU rules and regulations; however, the final deal came as a welcome relief, establishing a standstill period for medicines and medical devices regulation while a new UK framework is established.

PAGB continues to seek clarification and guidance in some areas including on continuity of supply for both Great Britain and for Northern Ireland.

# Self-regulation in a digital world



Consumer healthcare brands increasingly operate in a digital environment, bringing our members closer to consumers and creating new opportunities for advertising and product innovation.

PAGB developed a digital strategy to support the industry and ensure that self-regulation is fit for the future.

Throughout 2020, PAGB members, associate members and external partners worked together to develop industry positions and guidance across six priority areas.



## E-commerce

Companies and regulators need to be clear about when information on e-commerce platforms is in a company's control and if it is classed as advertising. Added to this are regulatory issues around delivery and supply and cross-border constraints.

PAGB's e-commerce group has undertaken a detailed review of these areas to inform clear guidance to help members navigate the online retail space.



## Advertising and social media

We've developed new advertising guidance on using social media to promote OTC medicines, medical devices and food supplements, for publication in early 2021.

The guidance reflects today's social media landscape and the many and varied ways that brands interact with consumers online.



## Real World Evidence

Consumer healthcare brands see important benefits in using consumer-generated data as part of the regulatory process.

PAGB is working with members to develop a definition and position on real world data and how it can be used in the OTC sector, including supporting advertising claims and looking at other regulatory procedures.

In 2020 we provided input to MHRA draft guidance on using real world data from randomised controlled trials to support regulatory decisions.



## Digital self care

In 2020 we published an analysis of NHS online self care resources in a Digital Self Care Audit. We recommended actions to harness progress made on digital health and remote services during the coronavirus pandemic to lock in a longer-term shift towards self care. We secured meetings with NHSX and NHS England to discuss our policy recommendations.



## Apps or medical devices?

Apps already play an important role in supporting healthcare and the UK's regulatory regime is starting to adapt to recognise this.

In consumer healthcare, the decision about whether an app is a medical device isn't always clear cut. PAGB's work in 2020 focused on developing an industry position on apps which support products, self-treatable conditions or education, including symptom checkers, to provide guidance on using apps with self care products.



## Electronic patient information

PAGB is exploring the potential for innovation in the way that people access patient information for OTC medicines.

The UK's exit from the EU creates a unique opportunity to further develop this idea in 2021.





# Delivering PAGB's strategy: a progress report

We began work to deliver PAGB's strategy to 2025 this year, with clear, actionable objectives and ambitious goals.

As the external situation changed, we swiftly reprioritised our work programme to focus on supporting members to prepare for future regulatory requirements – despite uncertainty around the terms of the UK's future relationship with the European Union – and to offer immediate support to manage the impact of COVID-19.

We did, however, make good progress towards our wider self-regulatory objectives in 2020 and have laid the groundwork for further development in 2021.



## Self-regulation: promoting best practice in our industry

### Advertising services

PAGB member companies continue to innovate and adapt to a changing self care market. From initial ideas to launch, PAGB helped members create advertising campaigns for new brands and products across medicines, medical devices and food supplements.

COVID-19 presented a challenge for advertisers as they worked to connect with consumers in a changed environment. The team advised members on creating educational content and reinforcing government advice, as well as working on last minute changes to campaigns to create the right tone and settings that represented people's everyday reality.

We also supported PAGB members with more general advertising queries, campaign advice and copy approval, assessing over 9,000 pieces of copy in 2020. We delivered online training throughout the year, giving brands the tools they need to continue to produce high-quality, compliant advertising for their products.



## Leading the way in online advertising

PAGB's digital strategy became more relevant than ever as lockdown restrictions led to a surge in demand for online shopping and self care support.

Our members are active across e-commerce platforms and social media and we supported them to make the most of those opportunities.

In 2020 we saw a marked increase in requests for advice on ecommerce and digital advertising. Alongside this campaign advice for individual companies, the advertising team worked with members, associate members and external experts to develop in-depth guidance on social media advertising across all three product categories.

In developing this new guidance PAGB has applied the regulations in new ways, reflecting the specific challenges faced by consumer healthcare brands in the online space. Our guidance has been welcomed by the MHRA and we'll be producing further guidance and training in 2021.



## Progress towards our goals

Consumer healthcare advertising is a case study in successful self-regulation. PAGB has always led the way in this area and today we continue to push boundaries while remaining clear on our goal of ensuring best practice in our industry.

### Self regulation: Advertising



#### Towards a fully-flexible service

In 2020 PAGB piloted a new advertising toolkit – a carefully-designed approach to advertising approvals, enabling members to take their first steps towards self-approving advertising content.

We worked closely with three member companies, learning from their experience to adapt and refine the system. The trial has been extended into 2021.



#### Creating a level playing field

In support of our aim to raise standards across the whole industry, we began work on challenging non-compliance outside of PAGB membership.

PAGB developed new guidance and a clear process to support member companies to raise concerns with the appropriate bodies. In 2020 this focused on advertising issues and regulatory pathways.



## Regulatory affairs

There is no doubt that PAGB's regulatory intelligence, guidance and support added value to members who were faced with the dual impact of the UK's departure from the EU and COVID-19. We provided tailored advice on the practicalities of supply and licensing; on the changing regulatory regime; and on new products as companies continued to innovate, particularly in reclassification and the food supplements sector.



## Progress towards our goals

While COVID-19 and EU Exit became the core focus of PAGB's regulatory activity in 2020, the team continued to make progress towards our strategic regulatory goals on reclassification, safety issues, packaging, medical devices and food supplements. Members on our regulatory working groups provided important input to these work programmes, helping to shape the direction of consumer healthcare regulation for the industry.

## Self regulation: products



### More and faster reclassification

PAGB submitted detailed feedback on MHRA's proposed updates to its reclassification guidance. Our priority is to make the process as streamlined as possible, enabling more and faster successful switch applications to widen access to self care products.

Owing to COVID-19, a planned symposium and further work exploring the potential for new switch models were moved into the 2021 work programme.

We continued to provide tailored regulatory support to companies who were preparing or going through the reclassification process.



### A new process for safety issues

In 2020, we finalised guidance on a heat map process for safety issues which is now used by our Regulatory Affairs Group to support horizon scanning.

PAGB initiated and led cross-sector working group meetings to begin the development of a new process for addressing safety issues with the MHRA. This work is ongoing into 2021.



### Towards self-regulation of packaging

We established a sub-group to look at the future self-regulation of pack design for OTC medicines.

The sub-group assessed key areas that could be part of a potential expansion of the notification scheme for OTC product labelling.





### Shaping the future of medical devices regulation

With input from members on our Medical Devices Working Group, our work in this area concentrated on preparing members for implementation of the Medical Device Regulation and, as the political situation changed, on developing our position on the new UK MD framework.

PAGB responded to consultations on key medical devices topics including draft classification guidance from the EU Commission, which we identified as having a major impact on substance-based medical devices.



### Clarity on food supplements regulation

PAGB and members on the Food Supplements Forum completed a wholesale review of our Guideline on the Advertising and Marketing of Food Supplements – a key piece of guidance for all companies with food supplements products. Work began on updating the labelling guideline.

We supported members to prepare for restrictions on health claims in a name or trademark from January 2022 and on the issue of additives in infant and young children's products.

We also began discussions with other trade associations about probiotics to develop a clear industry position

## Policy and engagement: shaping our environment

Through regular 'face-to-face' engagement with ministers and officials working on EU exit, PAGB created opportunities to raise our members' concerns – providing expert input into UK-EU negotiations. We also addressed the immediate needs and future opportunities presented by COVID-19 in discussions with regulators and policy-makers.

Given the enormous pressures faced by the NHS, we paused plans to pilot self care initiatives with healthcare professionals and instead focused on the impact of COVID-19 on self care.



### Progress towards our goals

#### Policy and engagement



#### UK/EU future partnership (see p.12)

We secured PAGB's place on the Industry Advisory Group on Supply and the EU Relationship Group (EURG) which provided important platforms to engage with Government on the future EU relationship and regulatory framework.

We became an expert voice on the Northern Ireland Protocol, bringing Government and retailers to the table to seek solutions to new regulatory challenges.

Working closely with the MHRA, we ensured that OTC medicines and devices were included as priorities for regulatory arrangements.



#### COVID-19 (see p.10)

We worked with the MHRA to identify and implement regulatory flexibilities for OTC medicines and medical devices.

We established good working relationships with policymakers and other trade associations, representing the industry in high-level policy discussions.

As an active member of the Ministerial Life Sciences COVID Response Group we influenced the development of the Life Sciences Recovery Roadmap: self care, digital healthcare and access to medicines were included in this important policy paper.

## Policy and engagement



### Self care

We refocused our self care activity through the lens of COVID-19. Our stakeholder engagement with the NHS, ministers, government officials and others was based on new data and analysis to support our case for policy change, including:

- updated PAGB's policy recommendations to reflect the impact of COVID-19 on self care – setting out clearly how positive changes could be locked in for the future
- led development of a consensus statement on self care with an influential group of health professional and NHS organisations
- published new research to understand how COVID-19 had affected people's attitudes to self care.



### Nutrition

The Health and Food Supplements Information Service (HSIS), funded by PAGB, published two key papers, highlighting nutrient shortfalls and the importance of food supplements:

- an independently written, peer-reviewed paper on plant-based diets
- a report on teenage and young adult diets based on data from the national diet and nutrition survey (NDNS).



### Digital (see p.15)

We delivered a multi-strand work programme to identify digital opportunities for the industry.

We worked with members and external partners to produce guidance on social media, e-commerce, apps and real-world evidence (RWE) for launch in 2021.



### Environment and sustainability

PAGB successfully lobbied the Government to exempt licensed human medicines from the new plastics packaging tax that will be levied from 2022. We:

- provided evidence and solutions on the feasibility of an exemption
- held meetings with HMRC officials, leading communication between trade associations and government bodies
- submitted a formal response to the consultation.

An exemption for the immediate packaging of licensed human medicines was announced in November 2020.

PAGB's strategic priorities include providing world-class member service; and ensuring good governance and a strong financial position.

## World-class member service



### Membership

We appointed a Membership Executive to improve processes and manage membership relationships with current and new members, and agreed membership strategic priorities.

We broadened PAGB's membership offering to include a regulatory consultancy service.



### Digital and member communications

We improved access to confidential and exclusive content for members in an updated members area online.

We introduced new member value communications giving an overview of PAGB added value during the year.



### Finance and operations; governance

PAGB ended 2020 in a good financial position.

New member fees, increased training revenue and reduced outgoings in 2020 contributed to this.

We appointed a new honorary Treasurer to provide support on financial matters.



### Media issues management

On behalf of the consumer healthcare industry, we published statements on a range of issues that came under the media spotlight in 2020.

Many were in relation to COVID-19, touching on subjects including OTC pain relief, medicine supplies as the pandemic unfolded, and the role of pharmacy teams.

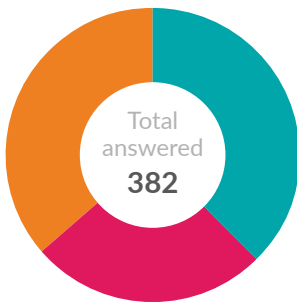
# 2020 in numbers

January – December 2020

PAGB members benefit from expert regulatory and advertising advice, advertising copy clearance and training to support their business and ensure best practice in self-regulation.

## Regulatory services

### Members' regulatory queries answered



OTC Medicines  
**144**



Food Supplements  
**139**



Medical Devices  
**99**

### Regulatory intelligence updates



**323**

### Meetings to explore regulatory issues



**131**

### Updates on priority issues

#### EU Exit intelligence



**142**

#### COVID-19 intelligence



**338**

## Advertising services

### Pieces of copy reviewed

**9,174**



### Pieces of advertising advice



**479**

### Campaign advice and development meetings



**292**

### Training



**33** PAGB workshops



Attended by **307** participants



**100%** online since March 2020

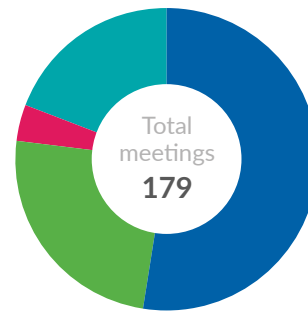
## Representing the industry

As the voice of the consumer healthcare industry, PAGB represented our members by engaging with media, regulators and wider stakeholders on issues affecting the industry to create a positive environment for self care in the UK.

### Consultations responded to



### Stakeholder meetings



## External reports and position papers



Our **reports and publications** made clear recommendations for action on policy issues which directly affect our members

## Media engagement

We provided interviews and statements to the media on behalf of the industry to inform the wider public debate on regulatory and self care issues.

### Media issues responded to



### Proactive statements issued





# Leading in a new landscape

Annual Review 2020

**PAGB**

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Company no. 00375216

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The Consumer Healthcare Association

PAGB, the consumer healthcare association, represents the manufacturers of branded OTC medicines, self care medical devices and food supplements in the UK.