



KEEPING A CLOSE EYE ON YOUR COMPETITION

For a general discussion about how our team can support your specific business needs, or to find out more about our services, contact:

✉ nina.monk@NicholasHall.com

☎ +44(0)1702 220 200

💻 www.NicholasHall.com/cima

Market Analysis with CIMA

Our customised reports are tailored specifically to your requirements and brief. We use our extensive market knowledge and the latest industry updates to provide analysis that is both current and insightful.

Whether you are interested in the probiotics landscape in the US, the regulatory situation in the EU or a global view of the latest trends in naturals, we can provide broad analysis and work with you to spot emerging opportunities and potential for future growth.

Market Analysis Includes:

- Market landscaping
- Key market trends
- Up-to-date data
- Government policies & regulations
- Distribution trends
- Recent product development
- Price analysis
- Market strategies
- Case studies (success & failure factors)
- Market forecasts & growth opportunities

A unique focus on Competitive Intelligence

Competitive Intelligence is vital to better understand competitors' strengths and weaknesses. The team monitors competitive portfolios, new product development, advertising strategies, while keeping a close watch on emerging trends – all in an effort to assist in the identification of future opportunities and ultimately enhance your own strategic decision-making.

Bespoke Company or Brand Case Studies Focusing on:

- Benchmarking
- Geographical reach
- Advertising & promotion
- Strategic direction
- Innovation & NPD
- SWOT

Over 40 Years of Experience

Our capabilities, drawing on 40+ years of experience in the consumer healthcare industry, allow us to make robust conclusions and provide a comprehensive view of the competitive landscape and its implications for you. This enables us to provide your in-house teams with broad and objective insight across the consumer healthcare industry.

Customised Industry Bulletins

- Bespoke reports
- Key news from select categories / companies / geographies
- Trend analysis
- Implications for your company
- Monthly or quarterly
- Sent directly to inbox

(available as a standalone product)

Product A: North America
Product A: Australia
Product A: Europe
Product A: Asia

When opportunities to increase sales
are sales and achieve the advantage
of marketing that has to go with the
product will be based on how you gain
control that will maximize

Benefits of CIMA Services



Actionable

Intelligence from our reports can be used to identify future opportunities & help you make informed business decisions



Tailored

A bespoke approach is agreed from day one so that our team can focus their research on the most relevant categories, geographies and marketers



Data-driven

Analysis supported by robust, reliable data from Nicholas Hall's unique OTC sales database, **DB6**



Real-time

Latest news and consumer & industry trends drawn from continuous monitoring of the market



Objective

Intelligence gathering & analysis without bias, providing an accurate view of the competitive landscape and helping clients to reach informed strategic decisions



All-round approach

Information sourced from up-to-date research, extensive in-house resources & local Network Partners™



About us

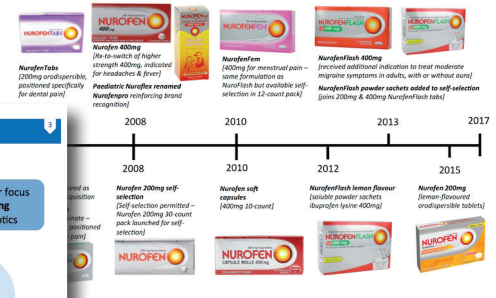
Founded in 1978, Nicholas Hall Group of Companies is an international specialist in OTC consumer healthcare and associated industries. No other company has such a wide network of contacts or is able to provide data and analysis, competitive intelligence and strategic advice on a truly global basis. This makes our products and services essential tools and resources for local, regional and multinational companies.



Project Samples



Nurofen: France Key Milestones



Global | Global Overview

Probiotics most dynamic OTC subcat – consistent year-on-year growth

US\$3.8bn
Global value

Increasing consumer focus on prevention + rising awareness of probiotics

+11.6%
CAGR 2017/13



2.8%
share of global OTC

Evolution from GI health to diverse range of targeted areas

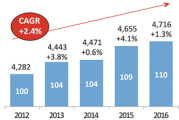
Segmentation driving portfolio development – options for children post

General shift in NPD towards trademarked / patented strains

Germany: OTC market

Europe's largest market posts solid growth

Germany OTC market 2012-16 (€mn MSP)



Germany OTC market 2012-16 (units mn)



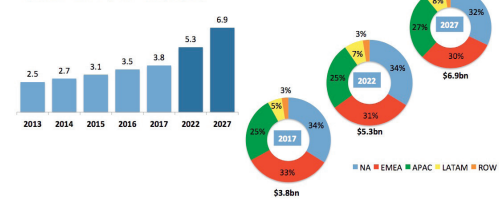
*Data refers to pharmacy sales.
Source: Nicholas Hall's DBS (€mn @ MSP); CAGR 2016/12



Global | Global Overview - Forecasts

- Category consistently posting strong growth
- Growth decelerating in developed markets such as USA & W Europe
- ... but rising in China owing to increased consumer awareness
- Global market expected to continue to grow, but slowdown forecast as major markets mature

Probiotics Market (value sales, US\$bn)



Source: Nicholas Hall's DBS (US\$bn @ MSP)

If you wish to discuss more about how we can help you, please get in touch with Nina.

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