



Publications:

- Reports
- E-Newsletters
- Bi-monthly periodicals



Global CHC Sales Database



Consultancy & Competitive Intelligence



Digital Services



Events:

- Corporate events
- Webinars
- Marketing Awards
- CHC Training Academy



Executive Recruitment

Nicholas Hall Group of Companies

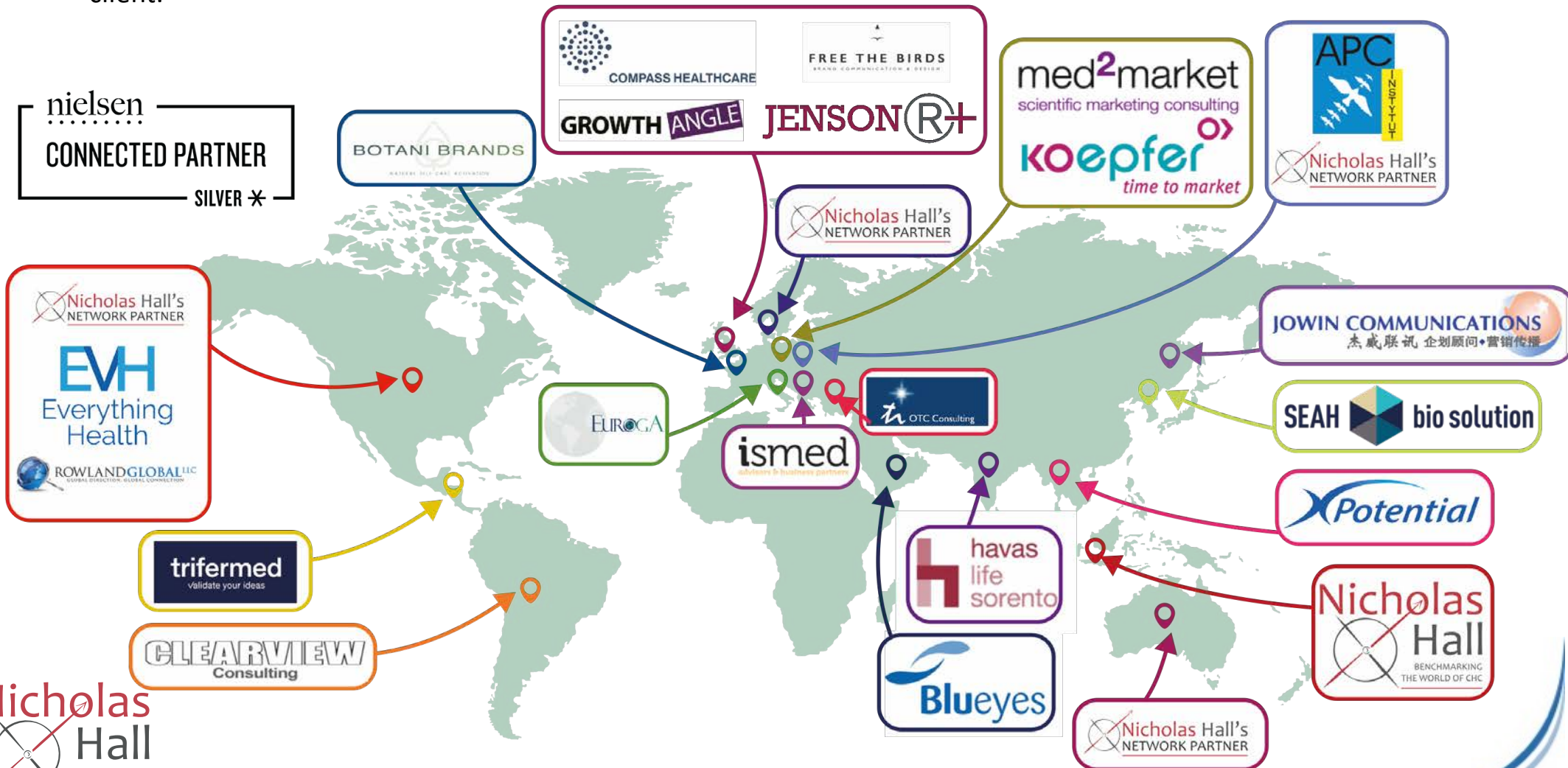
2023 Service Guide

Nicholas Hall Group of Companies

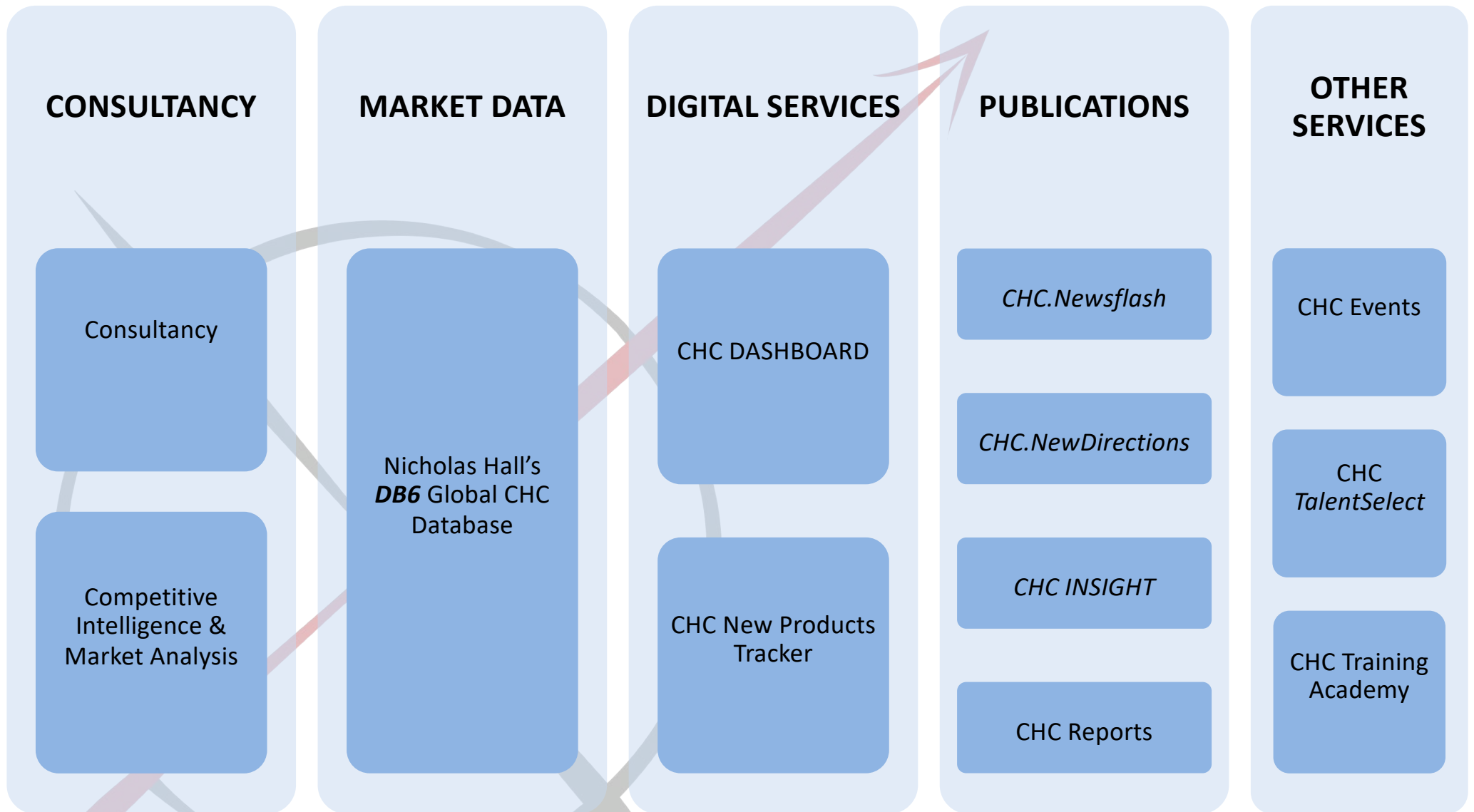
- ✕ Founded in 1978, Nicholas Hall Group of Companies currently has 60 dedicated staff, made up of consultants, researchers, analysts and editors, event organisers and marketers based around the world.
- ✕ Today, the Nicholas Hall Group continues to be led by Nicholas Hall and the senior management team. Our regional office in Singapore opened its doors in 2010 and is supported by a local team of consultants, Business Development experts as well as local partners and associates in the region.
- ✕ Nicholas Hall Group of Companies consists of:
 - Nicholas Hall Europe Ltd (UK-based)
 - Coigne International Ltd (Guernsey-based)
 - Nicholas Hall Asia-Pacific Pte Ltd (Singapore-based)
 - Nicholas Hall International Pte Ltd (Singapore-based)
- ✕ Our Consultancy services specialise in consumer healthcare, providing data and analysis, competitive intelligence and strategic advice on a global basis.
- ✕ We continue to have a global presence with esteemed Network Partners in Argentina, Australia, Benelux, Brazil, Canada, C&EE Region, China, France, Germany, Greece, India, Italy, Japan, Mexico, Middle East, New Zealand, Nordic Region, Poland, Portugal, Russia, Spain, Taiwan, Turkey, UK and USA.

Comprehensive Global Coverage

- Global CHC market coverage with all Network Partners having a wealth of experience in the healthcare industry, offering vast local expertise.
- All Network Partners are under CDA with NHC; if necessary, Network Partners can sign a CDA direct with the client.



Our Products & Services *Supporting Your Business Expansion*



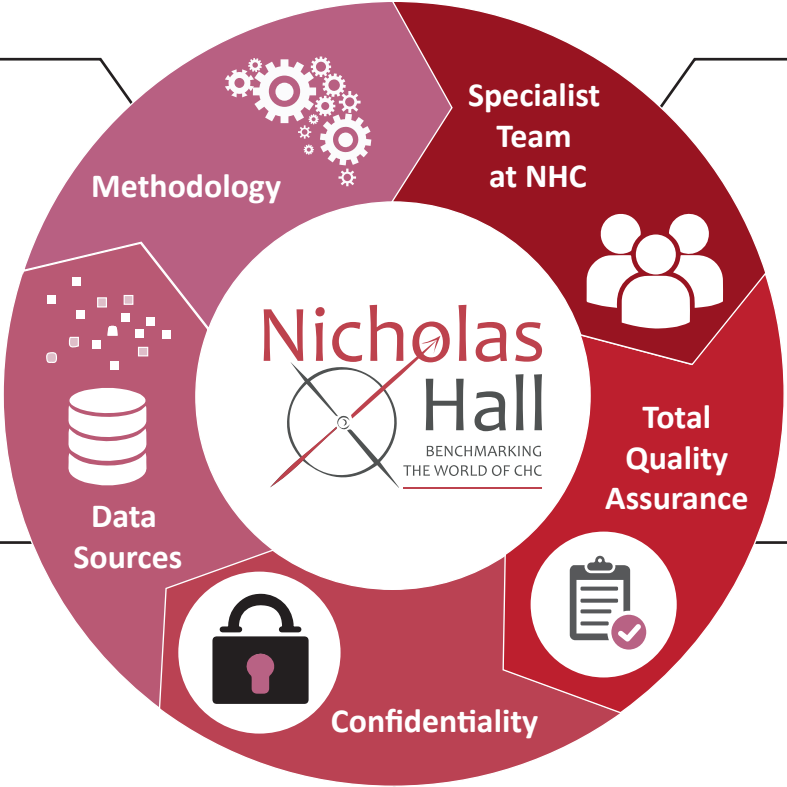


CONSULTANCY Division

Key Attributes & Capability

Methodology

In general, projects will incorporate secondary research and analysis. Where necessary, local associates will provide additional insights into specific market factors.



Specialist Team at NHC

NHC is a leading marketing consultancy & business intelligence group specialising in the consumer healthcare and retail markets. Founded in 1978, it continues to be independently owned. 90% of the company is made up of market analysts; NHC also boasts an extensive network of partners in more than 20 markets globally.

Data Sources

In each project, we will use our unique Global CHC Strategic Database, **DB6**, to complement the project with latest CHC sales data. **DB6** tracks 63 countries globally providing sales and forecast data.

Total Quality Assurance

We subscribe to the concept of total quality assurance and business ethics. This means that, among other assurances we give our clients, we do not work on competing products in the same country at the same time. We put our knowledge and skills at the disposal of few clients and this is reflected in our fee structure.

Confidentiality

We give the normal undertaking in relation to non-disclosure of confidential and proprietary information. However, we propose that a Confidentiality Agreement be signed to cover the specific project.

CONSULTANCY Division

5 COMPETENCIES



1. ENTRY & GROWTH STRATEGIES

Formulating strategies to help your company grow in existing and new healthcare categories, geographic territories and sales channels.



2. FUTURE PROOFING

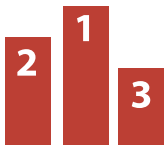
Preparing your business for the future by reviewing the business for internal and external challenges, and offering sustainable solutions



3. M&A

Negotiating the successful acquisition of companies and brands, asset swaps, brand fostering and financing. We use a customised approach and our extensive network of contacts to identify and pursue relevant opportunities.

We can assist with seller-buyer introductions, opening negotiations and due diligence, right through to completed transactions.



4. POSITIONING

Identifying a differentiated and unique positioning for existing or future brands and line extensions, within both the Consumer Health Care market and adjacent categories.



5. INNOVATION

Offering a range of licensing opportunities of innovative products that will freshen, complement or extend your company's existing product portfolio. We conduct customised searches for innovative new products and marketing partners.



CONSULTANCY Division

TOOLS



1. FEASIBILITY STUDY

Identifying the correct strategy for your company and brands, based on accurate and up-to-date market insights and the latest sales data from our global statistical database, **DB6**.



2. SPOTLIGHT

Thoughtfully searching for the best partners and products to suit your business, and guiding the negotiation process from start to finish.



3. FORENSICS

Our unique forensics technique has 3 key stages:

Discovery - may include field visits;

Workshop - a thorough process of stress-testing the current strategy, benchmarking best-in-class competitors, and brainstorming new solutions;

Key Learning - designing a successful Business Development plan.



4. VALUATION MODEL

This financial analysis tool is used to create multiple scenarios for future growth, including P&L, Rol and NPV / TV. It should be at the heart of all major company and brand decision-making, especially when expanding into new markets..



5. GAP ANALYSIS

Analysing the current CHC market and adjacent categories, identifying gaps with Unmet or only Partially-Met consumer demand, or looking at how established categories can be entered with novel products and a unique consumer positioning.





CONSULTANCY Division

The Experienced Supplier of Choice

NHC appointed to scout for licensing & acquisition opportunities (inc. Rx-to-OTC switch opportunities) / potential partners (for example):



In- & Out-licensing projects (for example):



Preparation of IM, Deal Negotiations (for example):





Market Analysis



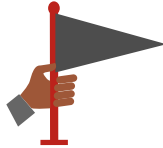
Market Trends



Price Benchmarking



Up-to-date sales data



Health Authority policy & regulation



Case Studies



Distribution Trends

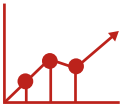


Latest Product Developments



Market Forecasts

Bespoke Company or Brand Case Studies



Benchmarking



Key Competencies



Geographical Reach



Strategic direction



SWOT analysis



Brand sales & growth



Regulatory classification



Distribution channels



Advertising & Promotion

Customised Industry Bulletins



Bespoke reports



Key news from selected categories & geographies



Competitor monitoring



Implications for your business



Available monthly or quarterly & sent directly to your inbox



DB6 Global CHC Database

- **DB6** is an important **strategic planning tool** for the CHC industry.
- **Provides “The Bigger Picture”** – sales through all retail outlets.
- **Reliable and robust data** – audit-based with ongoing validation.
- Competitive landscape, growth trends and forecasts **information at-a-glance.**
- **User-friendly and easy to use** database.
- **Supports investment decisions** – acquisitions, prioritising countries or categories.
- **CHC expertise:** **DB6** team on hand to provide additional insights in growth trends.

 5 years historical data	 Active ingredients	 Strategic planning	 5 & 10 year forecasts	 Value data/ volume data or both	 Quarterly MAT updates
 Customised regional/country packages	 63 countries detailed	 Subscription options	 Distribution shares	 M&A planning tools	 5 reporting currencies + local currency options
 Complete coverage of store-based sales	 Population sizes & capita spends	 Consistent definitions	 Assess competitive landscapes	 Growth rates, CAGRs, rankings market shares	 Adhoc purchases

Nicholas Hall's CHC DASHBOARD

All the facts at your fingertips Instantly digest key facts, reliable data & trends in 63 markets!

An innovative web app designed to support CHC executives who are short on time and need quick access to reliable data and facts to make key business decisions.

CHC DASHBOARD can be accessed 24/7 no matter where you are, providing an overview of the global CHC market, plus snapshots into the specific areas of interest. In addition to the adjoining 12 key features, **CHC DASHBOARD** also has a weekly blog, and a briefing sent directly to your inbox.



Market Overview



Company Watch



Category Watch



Charts & Graphs



Ad Watch



Brand Watch



Forecasts



Distribution Fast Guide



Regulation Fast Guide



Rest of World



Market Movers

Nicholas Hall's CHC New Products Tracker

Keep up to date with new product launches, line extensions, roll-outs and relaunches



CHC New Products Tracker is an online database which allows consumer healthcare executives to keep tabs on the latest innovations and new product activity. Subscribers can also receive a monthly newsletter highlighting key innovations.

Designed with the user in mind, **key benefits are:**

- ✓ **Fast & easy to use** – providing instant information
- ✓ **Keep ahead** with the latest developments
- ✓ **Review activity** from competitors
- ✓ **Full searchability** – browse and download new entries or specific activity in an entire category or market
- ✓ **Track launches** in individual categories

Each product entry provides information on:

- ✓ **Brand positioning & claims**
- ✓ **Registration status**
- ✓ **Pricing**
- ✓ **Ingredient formulation**
- ✓ **Format & dosage**
- ✓ **Brand owner & marketer**
- ✓ **Innovation ranking** – awards star ratings (1-4 stars) based on brands' inventiveness and potential to disrupt the category



Activity ranked by quality of innovation (1 star >> 4 star)



Online database – a comprehensive library of CHC new product activity



Products tracked from 2013: close to 40,000 entries & growing month by month



Download to PDFs or CSV (converts to excel)



Track competitor activity



Coverage of 20 markets



Easy-to-access searches



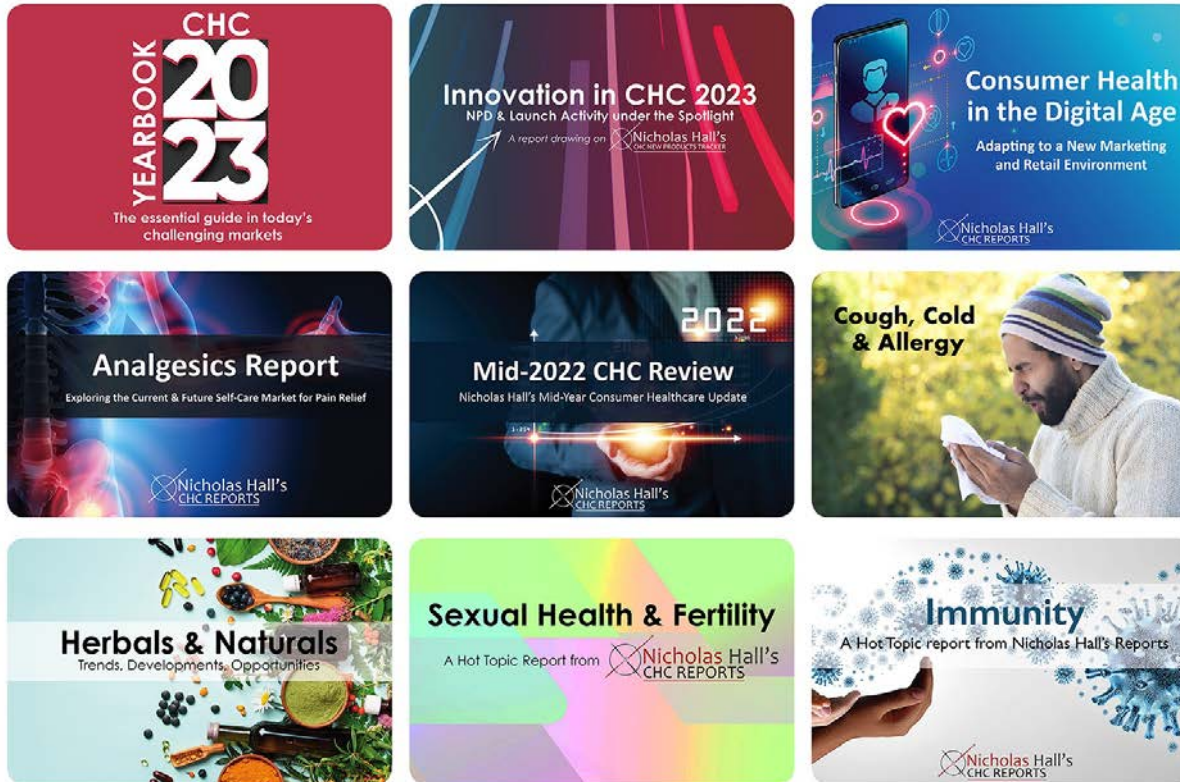
The details you need without overload

Publications



- ✓ **CHC INSIGHT:** Four separate bi-monthly editions covering the world's CHC markets: Europe, North America, Latin America and Asia-Pacific, available in print or pdf format.
- ✓ Each title includes extensive Market Reports, sales and growth figures from our **DB6** Global CHC Database and expert analysis to explain key trends!
- ✓ Additional digital licences available, giving full access to online searchable archives.





Special Industry Reports: These publications cover an extensive range of CHC categories across the globe, offering demographic reports and industry guides.

Our market reports draw on the in-house expertise of our specialist analysts and researchers, on-the-ground knowledge from our Network Partners, and Nicholas Hall's unique insights, plus the latest sales data from our **DB6** global CHC database.

Each title provides in-depth analysis, identifies major trends and developments, highlights consumer preferences and forecasts future sales.

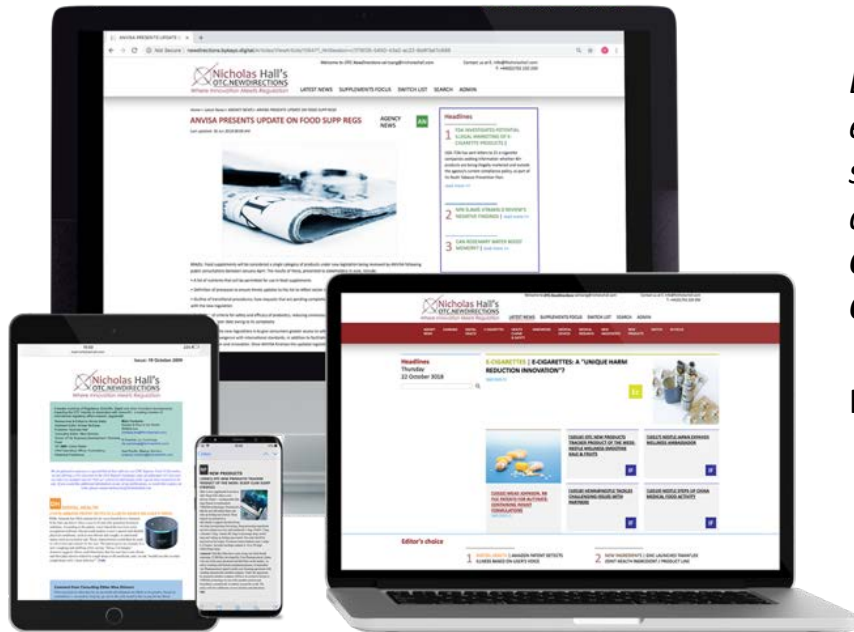
Combined e-newsletter service



✓ **CHC.Newsflash:** Sent every Friday, this newsletter covers major consumer healthcare developments from across the globe, including brand and company news, M&A activity, retailer and distribution news and advertising updates.



✓ **CHC.NewDirections:** This newsletter focuses on innovation, science and regulation. Sent fortnightly every other Tuesday, coverage spans Rx-to-OTC Switch, CBD, relevant medical research, probiotics, medical devices and new delivery formats, digital health / AI, e-cigarettes and much more.



Each of these services features insights and commentary from industry experts, including Nicholas Hall himself! Subscribers receive both services as part of one subscription. Subscribers will also be able to access fully searchable online archives, including an M&A register for CHC.Newsflash, and the Supplements Focus and Switch List for CHC.NewDirections.

For more information on each of these newsletters, please contact us.

✉ melissa.lee@NicholasHall.com

Other Services

Nicholas Hall's CHC Events

Conferences, Action Workshops & Webinars

Nicholas Hall's CHC Events are designed for heads of departments and decision-makers working in the Consumer Health and Pharma sectors. In the past, we have welcomed delegates from a range of functions.

These meetings are designed to explore major topics impacting the consumer healthcare industry, creating a space for delegates from markets across the world the platform to discuss, debate and create working relationships in a relaxed surrounding. Our conferences and workshops are stimulating forums of ideas for building successful and profitable CHC brands. We have also added webinars to our events programme to share key trends and insights across the globe.



Visit our website for upcoming events  <https://NicholasHall.com/events/>  maricar.montero@NicholasHall.com



Nicholas Hall's CHC TalentSelect Executive Recruitment Service


With our active work in the global consumer healthcare industry as marketing consultants and strategic advisors, we are uniquely positioned to advise on your recruitment needs. We have helped consumer healthcare companies, global and local, to build their teams using our extensive network of contacts and knowledge of the industry.

Our CHC TalentSelect team brings an unrivalled market perspective to the search and selection process, offering clients a truly unique understanding of their needs. With over 40 years' experience, we are able to deliver customised solutions for middle / senior management and executive level appointments.



For more information and a confidential discussion, please contact Mary.

 <https://NicholasHall.com/talentselect>

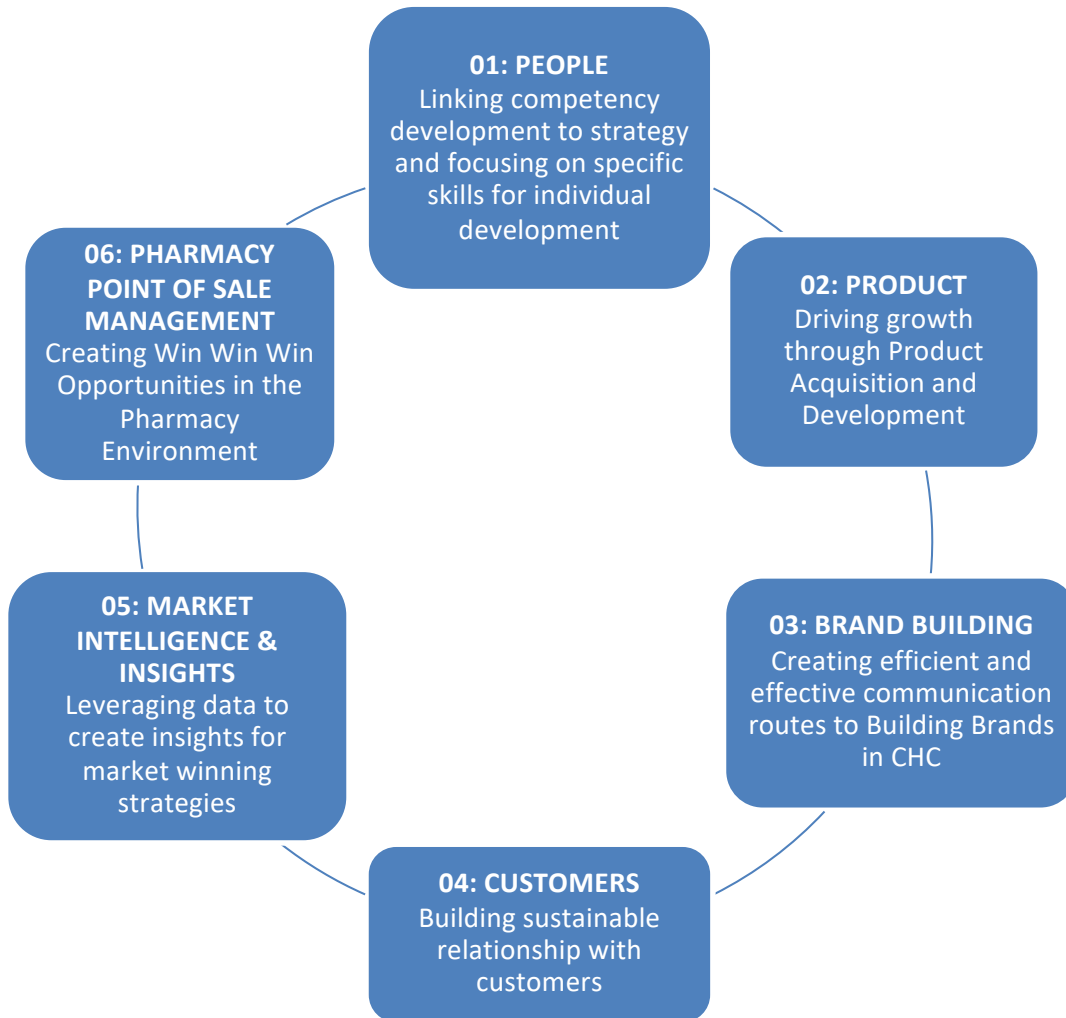
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The Consumer Healthcare Training Academy

Building Skills and Knowledge of the CHC Industry



A joint-venture from



The CHC Training Academy offers a series of training programmes in form of both **Open and Customised Workshops** to help develop your team's competencies, specifically relevant to winning in consumer health.



Key benefits of working with us:

- ✓ Ensures the brand is central to all activities
- ✓ Builds competencies and motivation for employees to deliver the brand
- ✓ Deep insight and experience in all major touch points for Brand Building
- ✓ Grounded in the world of CHC
- ✓ Global, regional, local and cross category expertise
- ✓ Practical and pragmatic approach



www.chctrainingacademy.com



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for Business Development or a confidential discussion