



Nicholas Hall

BENCHMARKING THE WORLD OF CHC

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.

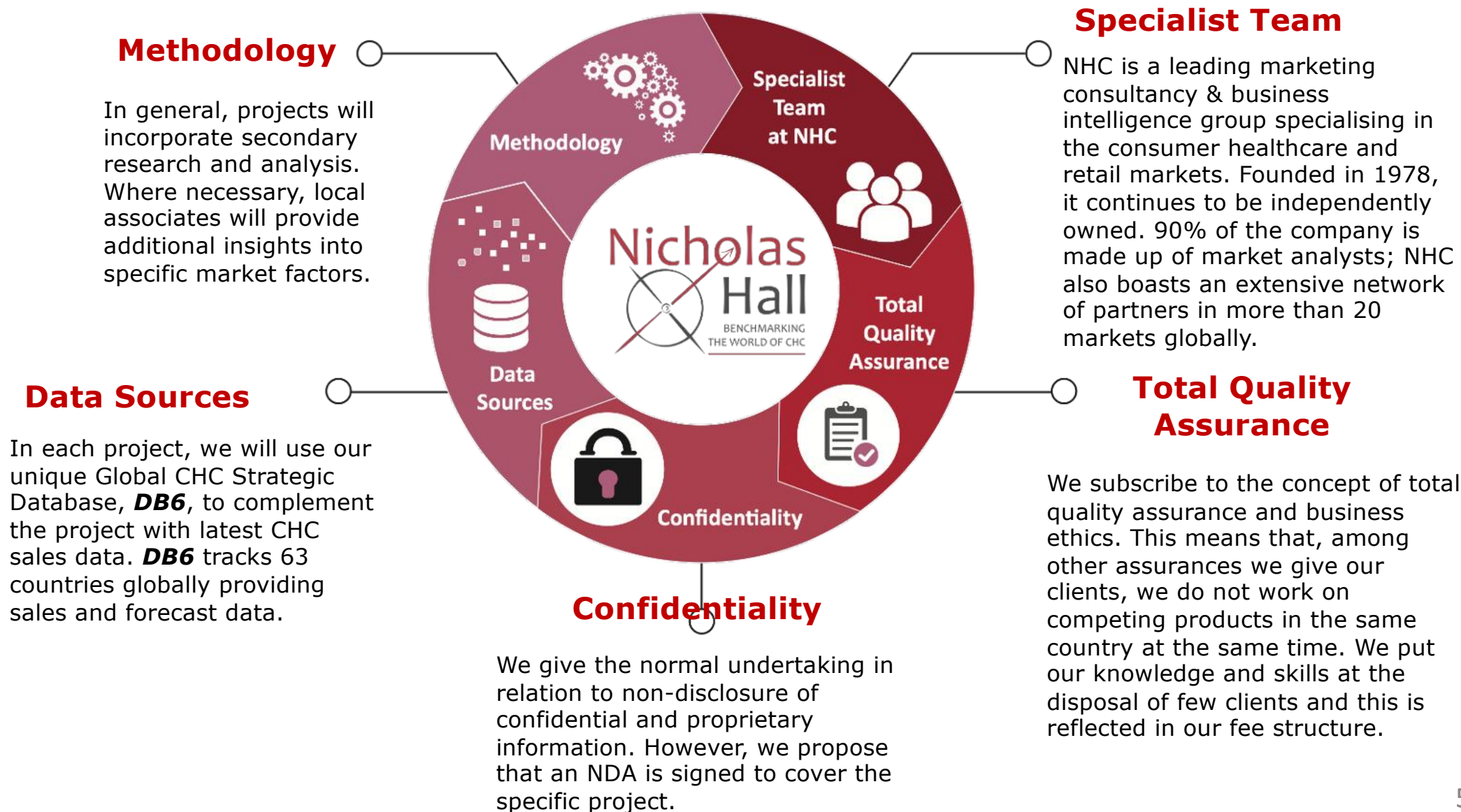
Comprehensive Global Coverage

-  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 NDA with us; if necessary, Network Partners can sign an NDA direct with the client.



CONSULTANCY Division

Key Attributes & Capability



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.



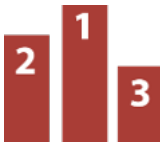
2. FUTURE PROOFING

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.



<https://NicholasHall.com/Consultancy>



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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, RoI 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.



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CONSULTANCY Division

Market Analysis



Market Trends



Price Benchmarking



Up-to-date sales data



Health Authority policy & regulation



Case Studies



Distribution Trends

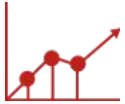


Latest Product Developments



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



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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.



New Paradigms

A Strategic Narrative for Consumer Healthcare's next phase of growth

Nicholas Hall's
New Paradigms
— Executive Platform

Drawing on more than 40 years of Consumer Healthcare expertise, Nicholas Hall connects the industry's most significant strategic shifts into a single, integrated narrative to clearly show where the next sources of competitive advantage will come from. He doesn't simply describe change, but challenges traditional thinking and provokes debate so that industry leaders and executives can make bolder, more adaptive strategic decisions.

Subscribe before **before**
31 October to receive
exclusive benefits

Foundation
Report due
January
2027



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New Paradigms

*A Strategic Narrative for
Consumer Healthcare's next phase of growth*

Executive Platform with exclusive benefits includes:

- 1** Opportunity to submit 3 strategic questions and receive personalised responses from Nicholas Hall
- 2** Advance access to Foundation Report before publication
- 3** An invitation to a private executive roundtable with senior Consumer Healthcare leaders
- 4** Access to quarterly strategic briefings in 2027
- 5** Preferential pre-publication rate - 20% off list price

M&A Watch

*Watching over your M&A Journey in
Consumer Healthcare from beginning to end*

*Start your M&A Watch journey today:
Focus your acquisition strategy, buy well,
build long-term growth and exit high!*

M&A Watch Foundation Report

Comprehensive
global transaction
database with
complete financial
metrics

Critical data,
insights,
analysis of
“must-do’s” and
success factors

Valuation
benchmarking built
from 150+
completed
transactions

Watchlist of
likely assets
that might
come to market
in next 2-3
years



M&A Watch Essential

Our Essential subscription provides objective, critical intelligence on the global M&A landscape month-on-month to uncover the deal playbook and signal what's next.

M&A Watch Spot the Deal

Goes further. Built for corporate development teams actively managing a pipeline and wanting a clear, balanced view of market potential and likely targets.



<https://NicholasHall.com/M&AWatch>



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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

PLUS all-new monthly Ad Watch newsletter now available as a stand-alone subscription!



www.chcdashboard.com



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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: 55,000 entries & growing month by month



Download to PDFs or CSV (converts to excel)



Track competitor activity



Coverage of 22 markets



Easy-to-access searches



The details you need without overload



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Insight



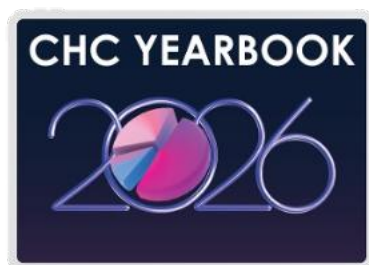
-  **CHC INSIGHT:** Four separate bi-monthly editions covering the world's CHC markets: Europe, North America, Latin America and Asia-Pacific, available in pdf and flipbook format with both single and multiple user options.
-  Each title includes extensive Category Reports, sales and growth figures from our **DB6** Global CHC Database and expert analysis to explain key trends, plus industry expert Q&As!
-  Additional digital licences available, giving full access to online searchable archives.



www.insight.nicholashall.com



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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.



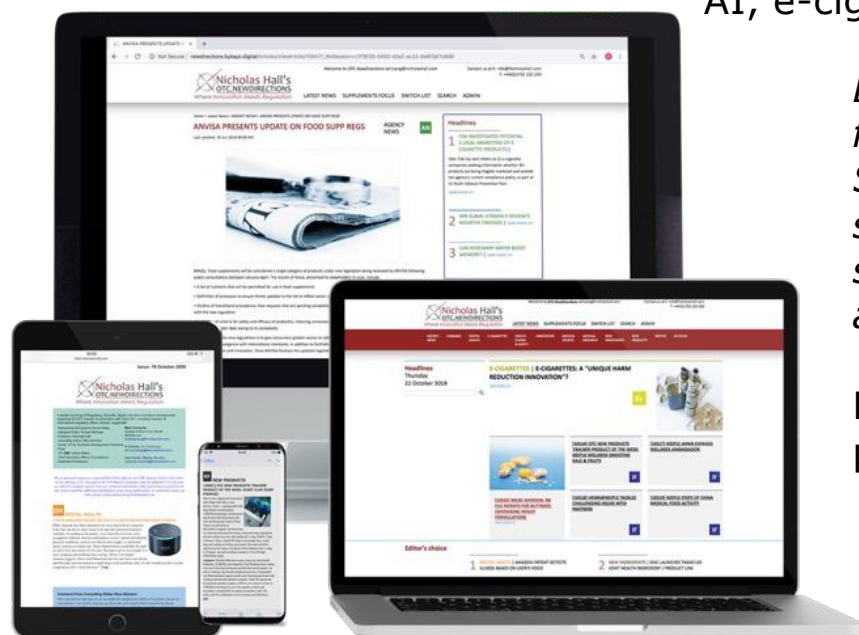
Combined e-newsletter service



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 and the Supplements Focus and Switch List for **CHC.NewDirections**.*

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



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www.chcnewdirections.nicholashall.com



www.newsflash.nicholashall.com

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, as well as across adjacent industries and in private equity.

We welcome 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, in addition to the opportunity to network with industry peers.



Our conferences and workshops are stimulating forums of ideas for building successful and profitable CHC brands, and also provide the opportunity to showcase your brand through our Marketing Awards and event sponsorship programmes.



<https://NicholasHall.com/events/>



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Executive Recruitment Service Connecting People in CHC

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.

Making the Ideal Match:



Over 60 years of specialist insight



Unique understanding of client needs



Global reach across the consumer healthcare industry



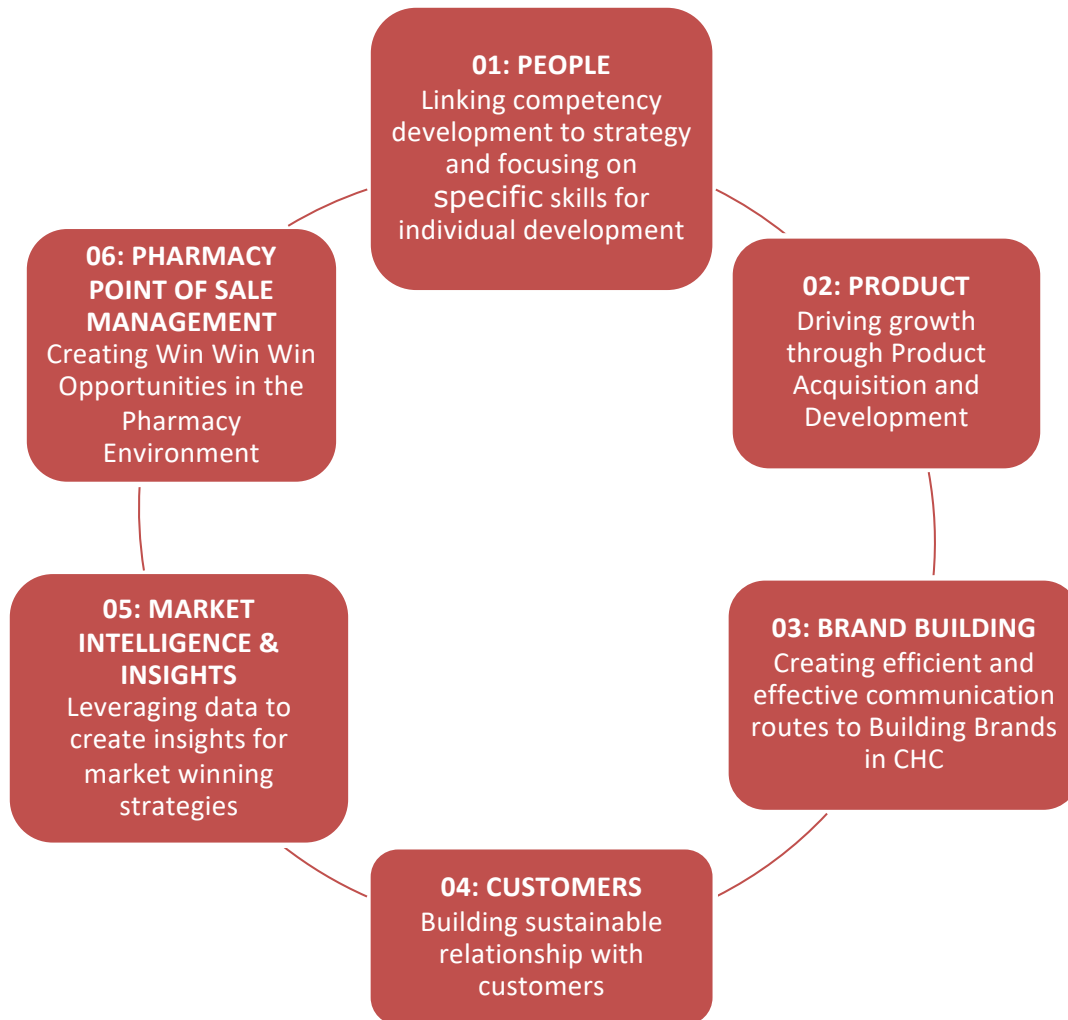
<https://NicholasHall.com/talentselect>



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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



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for Business Development or a confidential discussion