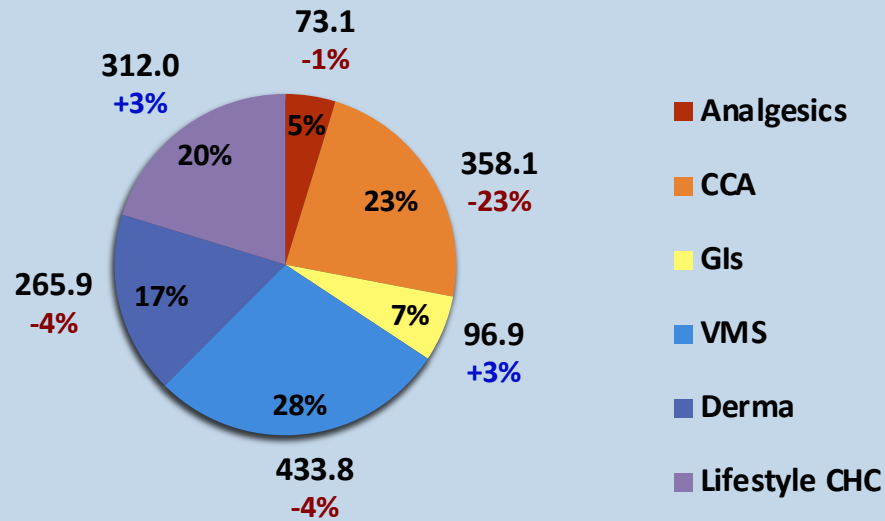


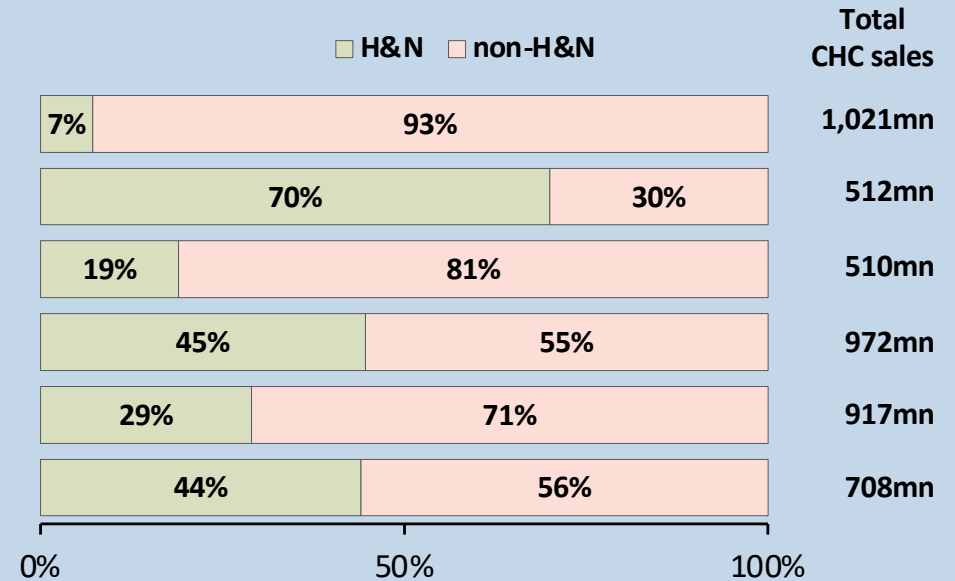
# France | Overview

France herbals & naturals sales by major CHC category mid-2021\* (MSP, \$mn)



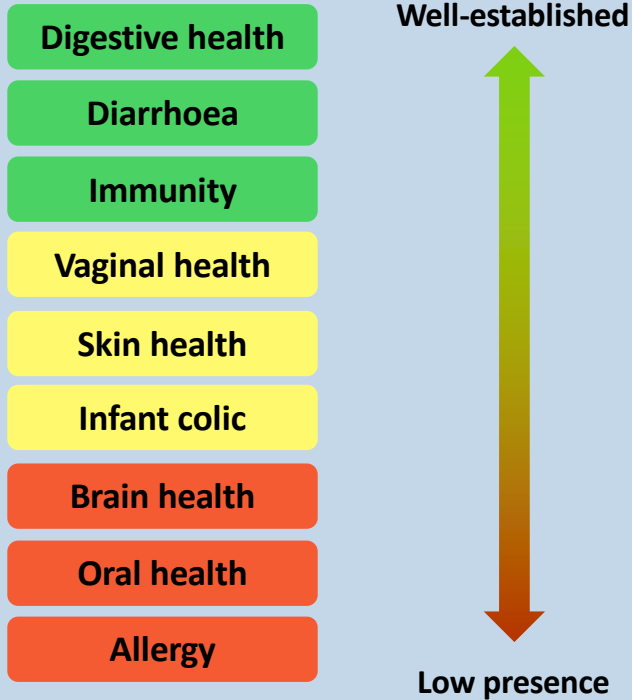
\* Herbals & naturals sales only

France herbals & naturals share of major CHC categories mid-2021 (MSP, \$mn)



- **Cough remedies** – both H&N and non-H&N – suffered big decline in year to mid-2021 amid weaker cold & flu rates during the Covid-19 pandemic; many herbal & natural brands (but not homeopathics) had grown well in recent years
- **Laxatives** sales held strong during Covid-19 pandemic owing to sedentary lifestyles and poor diets, with the smaller herbals & naturals category performing better than non-H&N
- **Sedatives & sleep aids** – both the larger H&N category and smaller non-H&N – grew well in the year to mid-2021 owing to increased stress & anxiety caused by the pandemic
- **Urinary products** declined slightly; marketers are looking to energise the market with NPD such as soluble stick formats
- **Prostate remedies** are heavily reliant on reimbursement, although there are some consumerised supplement brands

## Positioning for probiotics in Australia



- Niche probiotic presentations do not contain additional ingredients, and instead use specialised probiotic strains for specific health claims
- Hayfever Relief contains proprietary lactobacillus paracasei strain LP-33, while women's health presentation Candex is formulated with a combination of L. rhamnosus, reuteri and acidophilus alongside bifidobacterium animalis ssp lactis

## Australia leading probiotics mid-2021 (MSP, \$mn)

	Brand	\$mn	mid-21/ mid-20	% share
1	<b>Inner Health</b> (Metagenics)	<b>81.8</b>	+5%	47
2	<b>Life Space</b> (Evolution Health / By-Health)	<b>51.5</b>	-1%	32
3	<b>Blackmores Probiotics</b> (Blackmores)	<b>6.8</b>	-2%	4
4	<b>BioCeuticals Probiotics</b> (Blackmores)	<b>5.8</b>	-2%	4
5	<b>Bioglan</b> (Pharmacare)	<b>5.3</b>	+2%	3
6	<b>Faulding</b> (Endeavour Consumer Health / Ebos)	<b>3.8</b>	+4%	2
7	<b>Blis Probiotics</b> (iNova for Blis Technologies)	<b>3.0</b>	+20%	2
8	<b>Swisse Probiotics</b> (Swisse Wellness / Health & Happiness)	<b>1.6</b>	-24%	1
9	<b>BioGaia</b> (Nestlé for BioGaia)	<b>1.5</b>	+11%	1
10	<b>Meta Align</b> (P&G)	<b>0.8</b>	-1%	<1
11	<b>Nature's Way</b> (PharmaCare)	<b>0.7</b>	-4%	<1
12	<b>Enliva</b> (Viatris)	<b>0.6</b>	+2%	<1
	Others	<b>5.5</b>	+6%	3

# USA | Other herbal & natural supplements

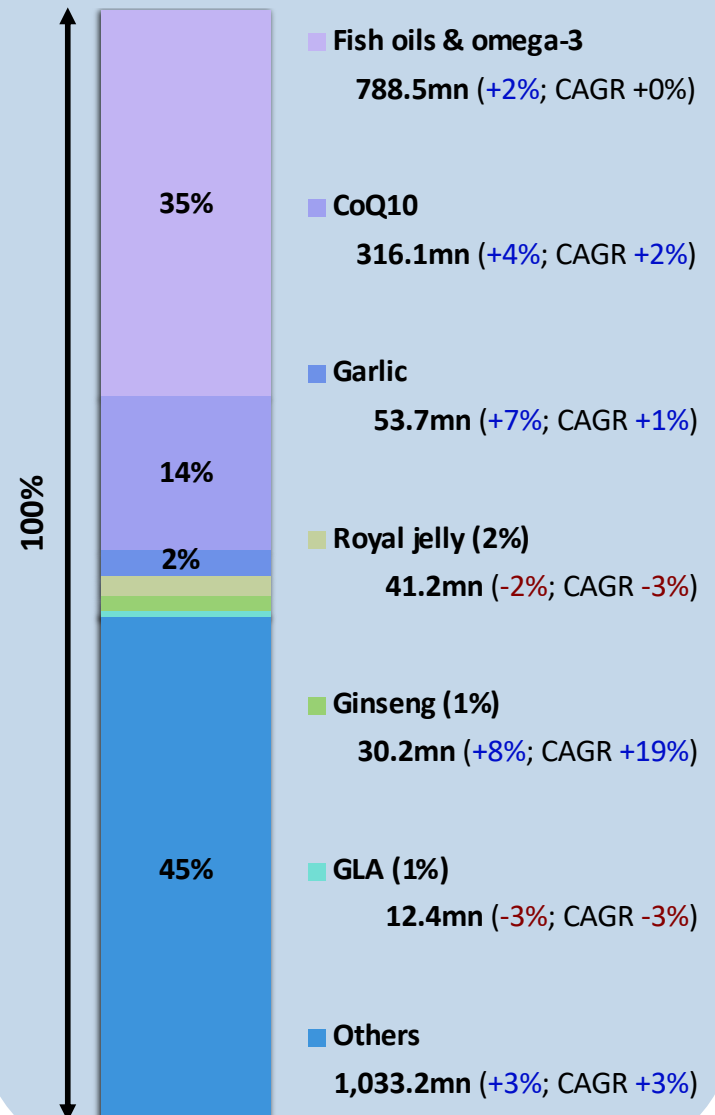
- Vegan launches were a notable trend including **Wiley's CatchFree Omega** (Wiley's Finest, March 2020) and **Forest Remedies Multi Omega 3.6.9** (Forest Remedies, July 2021), both featuring ahiflower oil as an alternative to fish and flax oils, while **Vegums Algan Omega-3** (Vegums, January 2022) feature DHA derived from algae oil



## Co-enzyme Q10

- Category is dominated by numerous CoQ10 supplements from longline players, with most posting only moderate growth and with little differentiation; most are positioned to support heart health and energy production, plus replenishing CoQ10 levels during treatment with statins

## USA other herbal & natural supplements sales by segment mid-2021 (MSP, \$mn)



## USA leading CoQ10 supplements mid-2021 (MSP, \$mn)

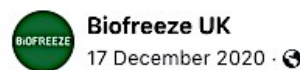
	Brand	\$mn	mid-21/ mid-20	% share
1	<b>Qunol</b> (Quten Research Institute)	<b>75.0</b>	<b>+20%</b>	24
2	<b>Nature Made CoQ10</b> (Pharmavite / Otsuka)	<b>72.3</b>	<b>+3%</b>	23
3	<b>Nature's Bounty CoQ10</b> (Nestlé)	<b>43.3</b>	<b>+1%</b>	14
4	<b>Natrol CoQ10</b> (Natrol)	<b>22.9</b>	<b>+1%</b>	7
5	<b>Sundown CoQ10</b> (Nestlé)	<b>7.1</b>	<b>-10%</b>	2
	Private labels	<b>34.6</b>	<b>-7%</b>	11
	Others	<b>60.9</b>	<b>+1%</b>	19

# Brand case studies | Biofreeze (Reckitt)

- Advertising strategy focuses strongly on sports marketing, encompassing online and traditional media leveraging “No.1 clinically recommended claim” to strengthen brand’s reputation for efficacy
- 2021 A+P included a competition in association with basketball team the Portland Trail Blazers, offering an opportunity to meet professional player Damian Lillard and win cash prizes
- Other celebrity endorsements include Angela Manual Davis and Sloane Stevens
- In 2022 brand became “Official External Pain Relief Partner” of the Rock ‘n’ Roll Running Series under a multi-year partnership
- Promotional activities include “Biofreeze Pain Relief Zones” at marathons and half-marathons, where a “Cooling Crew” offer the brand to participants
- Outside USA presence is more limited, with UK next largest market (\$1.7mn, -4%); brand was extended there in November 2019 with **On-the-Go Singles** single-dose sachets of gel
- Promotion in the UK includes a brand Facebook page with customer testimonies and inspiration and advice for sports and exercise enthusiasts (*see below*)
- Other markets include France (\$1.4mn, +1%) and Canada (\$0.7mn, +22%)
- Brand also launched in Australia in 2017, extended with a 110g SKU of the gel format in 2019



DAMIAN LILLARD AND THE TRAIL BLAZERS TEAMED UP WITH BIOFREEZE TO GIVE ONE LUCKY FAN THE CHANCE TO MEET DAME AND WIN UP TO \$100,000



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Clinically recommended Biofreeze provides cold therapy pain relief for sore muscles, joints, simple backaches, arthritis, strains, bruises and sprains. You'll find Biofreeze at Rock 'n' Roll Running Series events in a variety of formats like roll-on, gel, spray, patches and pens so you can cool the pain and start working towards your next goal.