

# Herbals & Naturals

Opportunities in a Vast & Dynamic Area  
of Consumer Health



Herbals & Naturals  
are driving growth  
across multiple  
markets and  
categories



## Key Features

- 9 core markets demonstrating scale, dynamism, exciting developments and new opportunities
- Biggest & most exciting categories in each market, including probiotics, herbal & natural cough remedies, sleep aids, topical analgesics and supplements
- Sales data from DB6 to year-end 2017 includes category sizes, historical growth rates, individual brand sales and performances, plus proportion of sales generated by herbals & naturals
- Individual brand case studies highlight developments, sales and success strategies
- Sales forecasts and opportunities showcase the potential for herbals & naturals in each market

# Herbals & Naturals

## Opportunities in a Vast & Dynamic Area of Consumer Health



**Herbals & Naturals** are one of the most exciting areas of consumer health, driving growth across multiple markets, not only in dedicated supplements categories such as probiotics and herbal & natural joint health but also cough & cold, pain relief, laxatives, sleep aids and more.



As “health and wellness” climbs up the list of consumer priorities and medicated ingredients are increasingly scrutinised and restricted, the market for herbal & natural options is booming. Often offering a lower regulatory threshold than regular medicines, widespread distribution and an increasing reputation for efficacy, they are being embraced by consumers and marketers alike. Consumer concerns over the safety of conventional medicines are also driving the trend towards herbal & natural products.

Probiotics in particular are consistently posting strong growth, driven by increasing awareness of benefits, expansion into new niches and increasing segmentation. While growth is decelerating in some developed markets, it is still advancing well, and posting double-digit growth in markets like USA, China and Brazil owing to increased consumer awareness.

Focusing on a selection of core markets that demonstrate scale, dynamism, exciting developments and new opportunities, this **Herbals & Naturals** report drills down to the detail in key categories.

The report examines the biggest and most exciting H&N categories in each market, from probiotics and herbal cough remedies to natural laxatives, topical analgesics, and supplements for heart health, immunity and memory.

Detailed sales from our **DB6** database to year-end 2017 includes category sizes and historical growth rates, with individual brand sales and performances in key categories. Charts show the proportion of sales generated by herbal & natural (vs chemical / non-natural) products in each category, and compare growth rates.



Successful and exciting brands are cherry-picked for individual case studies that highlight developments, sales and success strategies.

Looking to the future, the report features forecast sales and exploration of the potential for herbals & naturals.

### Table of Contents

#### Executive Summary

Overview of the main trends & developments, key H&N categories and major innovations

#### Country Profiles

Australia • Brazil • Canada • China • Germany • India  
Italy • Japan • USA

#### Brand Case Studies

Bronchostop • Burt's Bees • Culturelle • Enterogermina  
Prospan • Salonpas • Zarbee's

#### Outlook

A look forward to the prospects for herbals & naturals 2022-27, with sales forecasts and opportunities



Supplements

Cough remedies

Sleep Aids

Probiotics

Pain Relief

## Key herbals categories covered include:

- Probiotics
- Herbal & natural joint health
- Herbal & naturals supplements (incl. fish oils, ginseng, CoQ10, etc.)
- Topical analgesics
- Cough remedies
- Laxatives
- Lifestyle supplements (incl. hair & beauty, menopause, memory & brain health, etc.)
- Sleep aids
- Urinary products

## Market Coverage

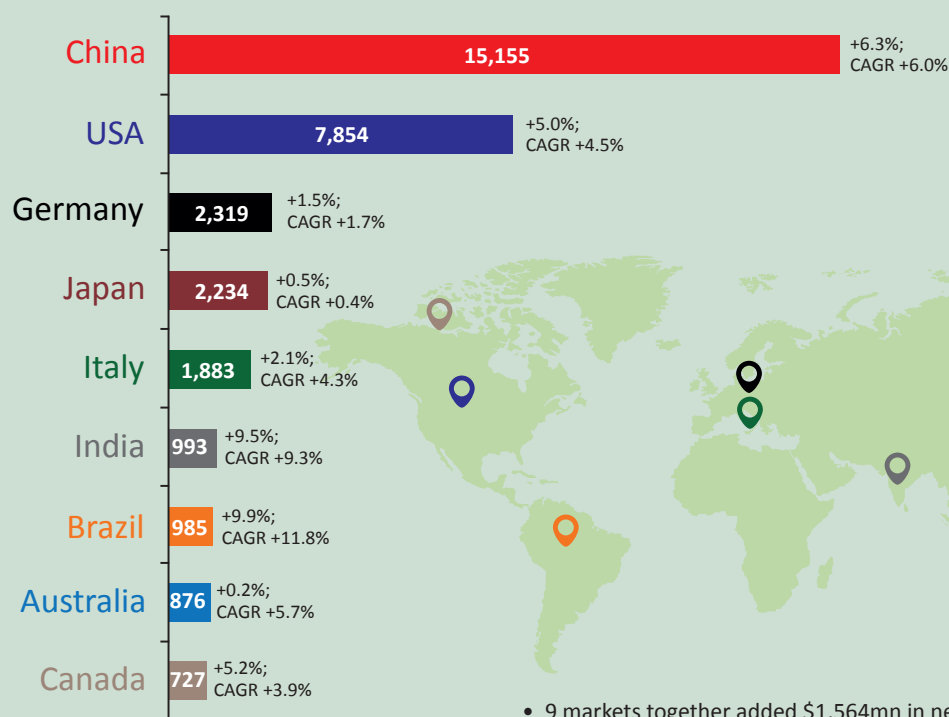


NB: individual country chapters are available for purchase; please contact [melissa.lee@NicholasHall.com](mailto:melissa.lee@NicholasHall.com) for details and pricing

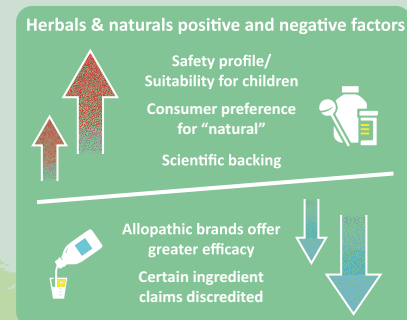
## Key Questions Investigated in this Report

- Which markets, categories and brands are most dynamic and why?
- Do opportunities for new growth exist in any of the established categories? And which have most potential?
- Which markets offer the best entry route for herbals & naturals?

## Herbals & naturals sales in leading markets 2017† (MSP, \$mn)



† 9 markets listed above only; CAGR refers to period 2013-17



- 9 markets together added \$1,564mn in net sales in 2017, with China and USA largest contributors



All global licence purchases grant complimentary access to a webinar in which the Nicholas Hall team runs through the key findings from the report.

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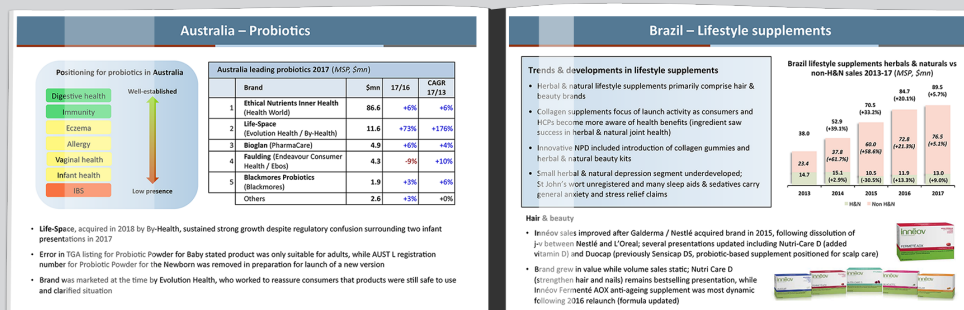
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# HERBALS & NATURALS



- 9 major markets from across the globe
- Biggest & most exciting categories in each market, including probiotics, herbal & natural cough remedies, sleep aids, topical analgesics and supplements
- Sales data from **DB6** to year-end 2017
  - Individual brand case studies
- Sales forecasts and opportunities showcase the potential for herbals & naturals in each market

Please contact [melissa.lee@NicholasHall.com](mailto:melissa.lee@NicholasHall.com) for more information about this report or visit our website (<https://nicholashall.com/report/herbals-naturals>) where you can view or download the full Table of Contents and sample pages.

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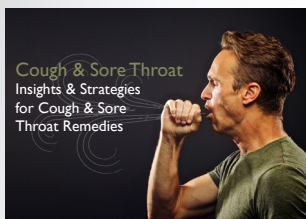
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Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in consumer healthcare, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

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June 2018



### OTC YearBook 2018

This unique reference book contains comprehensive market data through December 2017 from our **DB6** database. OTC YearBook brings you the essential facts, together with unique insight into the major issues facing OTC markets globally.

April 2018



### Allergy Relief

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March 2018



### Pharmacies in Vietnam

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February 2018



### Upper GIs

An exploration of the Upper Gastrointestinals market, including antacids, antilatulents, antinauseants, digestive enzymes and liver & bile remedies, with coverage of 15 major markets.

December 2017



### Rx-to-OTC Switch

Shining the spotlight on the switch procedure itself, and the regulatory hoops that must be jumped through to turn an Rx product into a successful OTC brand, the report aims to equip readers with a greater understanding of the ins & outs of switch.

December 2017



### Global Analgesics

Systemic analgesics, Topical analgesics and Mouth & dental analgesics, plus supplements positioned for pain relief are analysed in this report, including coverage of 16 major markets globally, with topline sales, new developments, launches and A+P campaigns.

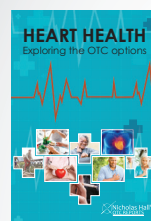
October 2017



### Cold & Flu

An in-depth exploration of the OTC Cold & Flu market, including Systemic cold & flu, Topical decongestants and Chest rubs & inhalants, plus VMS brands positioned for immunity.

August 2017



### Heart Health

Our report on Heart Health takes an in-depth look into this category, giving insight into the latest trends. It explores self-care options including systemic cardiovasculars, fish oils & omega-3 supplements, CoQ10, garlic and other supplements.

June 2017



### Healthy Ageing

With the population structure shifting to a new dynamic and the proportion of those aged over 50 steadily increasing, it's essential that OTC marketers cater to the specific health needs associated with older age.

February 2017



### Global OTC Dermatologicals

Covering categories as diverse as acne remedies, antifungals, wound care, cold sore treatments, eczema, lip care and hair loss, this essential report covers OTC Derma across 15 major markets.

November 2016



### Eye Health

This report contains multi-country coverage and reporting of individual brands. It features the latest trends & developments, brand case studies, and vital insight into factors affecting individual markets.

August 2016

## Get in touch!

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