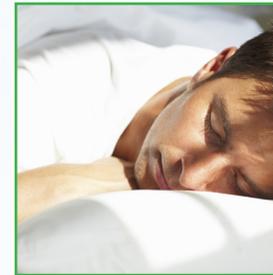


Herbals & Naturals

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.

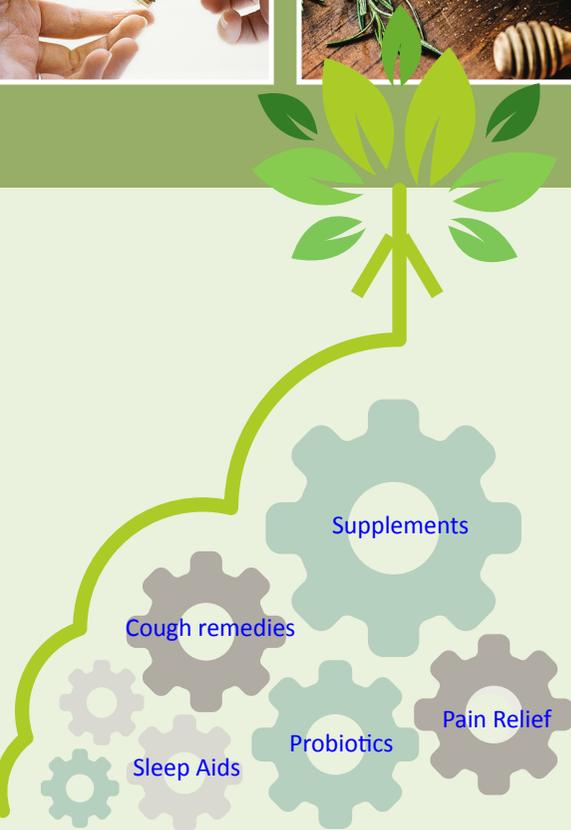


As "health and wellness" climbs up the list of consumer priorities and medicated ingredients are increasingly scrutinised and restricted, the market for herbal & natural options is booming. Often offering a lower regulatory threshold than regular medicines, widespread distribution and an increasing reputation 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

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

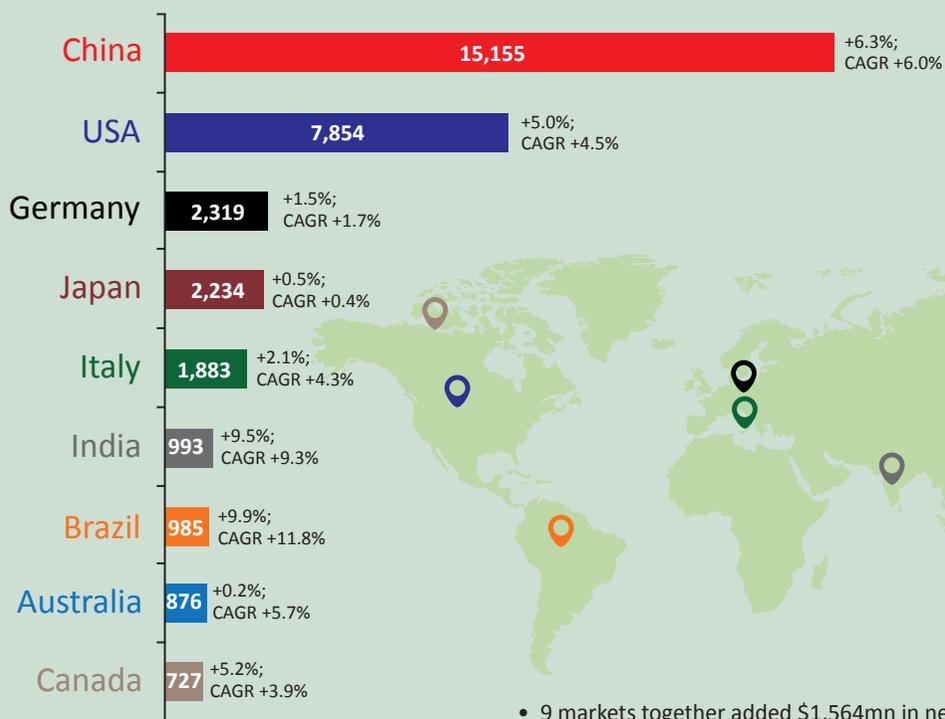


NB: individual country chapters are available for purchase; please contact melissa.lee@NicholasHall.com for details and pricing

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)



Herbals & naturals positive and negative factors

Positive Factors (Upward Arrows):

- Safety profile/ Suitability for children
- Consumer preference for "natural"
- Scientific backing

Negative Factors (Downward Arrows):

- Allopathic brands offer greater efficacy
- Certain ingredient claims discredited



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

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



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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HERBALS & NATURALS

Australia – Probiotics

Positioning for probiotics in Australia



Australia leading probiotics 2017 (MSP, \$mn)

Brand	\$mn	17/16	CAGR 17/13
1 Ethical Nutrients Inner Health (Health World)	86.6	+5%	+6%
2 Life-Space (Evolution Health / By-Health)	11.6	+73%	+176%
3 Bioglan (PharmaCare)	4.9	+6%	+6%
4 Foodline Endosensor Consumer Health / Eboe	4.3	-9%	+10%
5 Blackmores Probiotics (Blackmores)	1.9	+3%	+6%
Others	2.6	+3%	+0%

- Life-Space, acquired in 2018 by By-Health, sustained strong growth despite regulatory confusion surrounding two infant presentations in 2017
- Error in TGA listing for Probiotic Powder for Baby stated product was only suitable for adults, while AUST L registration number for Probiotic Powder for the Newborn was removed in preparation for launch of a new version
- Brand was marketed at the time by Evolution Health, who worked to reassure consumers that products were still safe to use and clarified situation

Brazil – Lifestyle supplements

Trends & developments in lifestyle supplements

- Herbal & natural lifestyle supplements primarily comprise hair & beauty brands
- Collagen supplements focus of launch activity as consumers and NCPs become more aware of health benefits (ingredient saw success in herbal & natural joint health)
- Innovative NPD included introduction of collagen gummies and herbal & natural beauty kits
- Small herbal & natural depression segment underdeveloped; St John's wort unregistered and many sleep aids & sedatives carry general anxiety and stress relief claims

Brazil lifestyle supplements herbals & naturals vs non-H&N sales 2013-17 (MSP, \$mn)



Hair & beauty

- Indoviv sales improved after Galderma / Nestlé acquired brand in 2015, following dissolution of joint between Nestlé and O'Neal; several presentations updated including Nutri-Care D (added Vitamin D) and Duoap (previously Sentiap DS, probiotic-based supplement positioned for scalp care)
- Brand grew in value while volume sales static; Nutri Care D (strengthen hair & nails) remains bestselling presentation, while Indoviv Ferment AOX anti-ageing supplement was most dynamic following 2016 relaunch (formula updated)



- 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 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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June 2018



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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.

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An in-depth exploration of the Allergy market, including Allergy remedies, Anti-itch derma, Eye allergy and Asthma remedies, plus a look at selected allergy-focused products from topical decongestants, probiotics and elsewhere.

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A collaborative project undertaken by Nicholas Hall and DKSH detailing everything you need to know about the pharmacy landscape across Vietnam. The findings are based on secondary data sources and a primary market research study.

February 2018



Upper GIs

An exploration of the Upper Gastrointestinals market, including antacids, antiflatulents, 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.

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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.

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Eye Health

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August 2016

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