

Australia – Herbal & natural supplements

Focus on weight management supplements and diet aids

- Interest is increasing in supplements for weight and cholesterol management
- Garcinia Cambogia, a natural source of hydroxycitric acid, claims to provide temporary feeling of fullness to suppress food cravings; both Sanofi (under Cenovis line) and Global Therapeutics (under Oriental Botanicals line) launched supplements with the ingredient in 2016
- GO Healthy (Better Health Company), rolled out in Australia in 2018, also includes garcinia presentation in its weight management range
- PharmaCare launched **Bioglan Apple Cider Vinegar** in 2017, positioned to help weight loss and cholesterol balance and also claimed to aid in some cases of diabetes; also fields a garcinia combination
- Caruso's range (Caruso's Natural Health) extended with **Green Tea** extract in 2017, claimed to support energy production and burn calories
- **SUP Fit** (Liquefy Health) fat-burning and energy supplement rolled out in 2018, containing wide range of natural extracts including bitter orange, ginseng and tea
- **Healthy Care**, overall No.6 brand in Australian VMS, comprises diverse portfolio of niche supplements including weight management (via garcinia cambogia and forskolin supplements), bitter melon for blood sugar control and green coffee bean supplement claimed to reduce food cravings, support metabolic health and support blood sugar levels
- Marketer Nature's Care was acquired in 2018 by state-backed Chinese consortium, bringing improved presence in China



India – Traditional digestive remedies

- **Zandu Pancharista** grew modestly after advancing by 36% in 2016, driven by high level of retailer stocking
- In bid to improve penetration and garner new consumers, marketer invests in frequent promotion
- Mid-2017 TV ads depicted man able to indulge in all his favourite foods as product acts on root cause of his indigestion
- **Pudin Hara** promoted at Nauchandi Mela in Meerut in May 2017, where large Pudín Hara bottle was constructed
- On-the-ground campaign designed to reinforce Pudín Hara's efficacy at providing fast relief from stomach disorders took place over a week in June 2017
- In Uttar Pradesh during a heatwave, sampling teams offered taster samples of Pudín Hara's liquid presentation diluted in filtered chilled water



India leading traditional digestive remedies 2017 (MSP, \$mn)				
	Brand	\$mn	17/16	CAGR 17/13
1	Hajmola (Dabur)	32.8	+13%	+7%
2	Zandu Pancharishta (Emami Group)	25.9	+4%	+39%
3	Panchwati (Panchwati Prayogshala)	8.7	-10%	+2%
4	Pudin Hara (Dabur)	8.7	+7%	+8%
5	Satmola (SSG Pharma)	7.7	+12%	+9%
6	Dabur Lavan Bhashkarchurn (Dabur)	2.4	-3%	+8%
7	Chamria range (Vaidya Nandram Gigranj)	2.0	+6%	+4%
8	Miltona (Mohan Foods)	1.6	-32%	-7%
9	Harde (Hawaban Harde Depot)	1.5	+12%	+12%
10	Hingoli (Dabur)	1.5	-1%	+2%
	Others	15.5	+4%	+1%



Giant Pudín Hara bottle in Meerut 2017

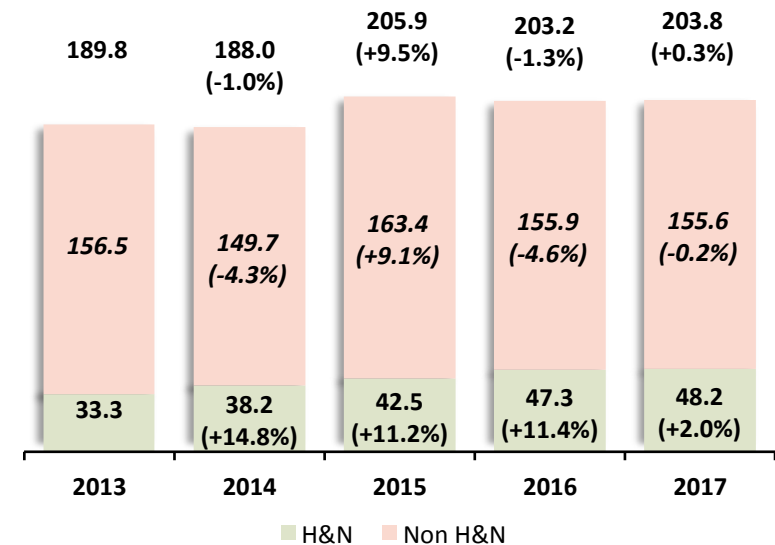


Italy – Herbal & natural cough remedies

Trends & developments in herbal & natural cough remedies

- Strong growth for H&N brands since 2013, especially compared to stuttering performance of allopathic cough remedies (H&N share of sales grew from 18% in 2013 to 24% in 2017)
- Growing consumer demand for natural ingredients as perceived to be safer than conventional allopathic options
- Wide range of natural options available, with products such as Grintuss differentiated by general-purpose positionings
- Sanofi (and previously BI) sees strong potential in category, launching several herbal & natural line extensions to traditional allopathic brands

Italy cough remedies herbals & naturals vs non-H&N sales 2013-17 (MSP, \$mn)



- **Grintuss** promoted as “remedy for dry and wet cough”; dual positioning is clear point of difference to leading allopathic brand, Chiesi’s Fluibron (which has different presentations for wet and dry cough)
- Main ingredients honey and poliresin (resin, polysaccharide & flavonoid complex from grindelia, plantain & helichrysum)
- Grintuss growing rapidly, with paediatric syrup accounting for majority of sales; adult range extended with unidose orodispersible tablets in 2016
- Informative ads (*see right*) use scientific imagery to emphasise reliability and efficacy of herbal formula

