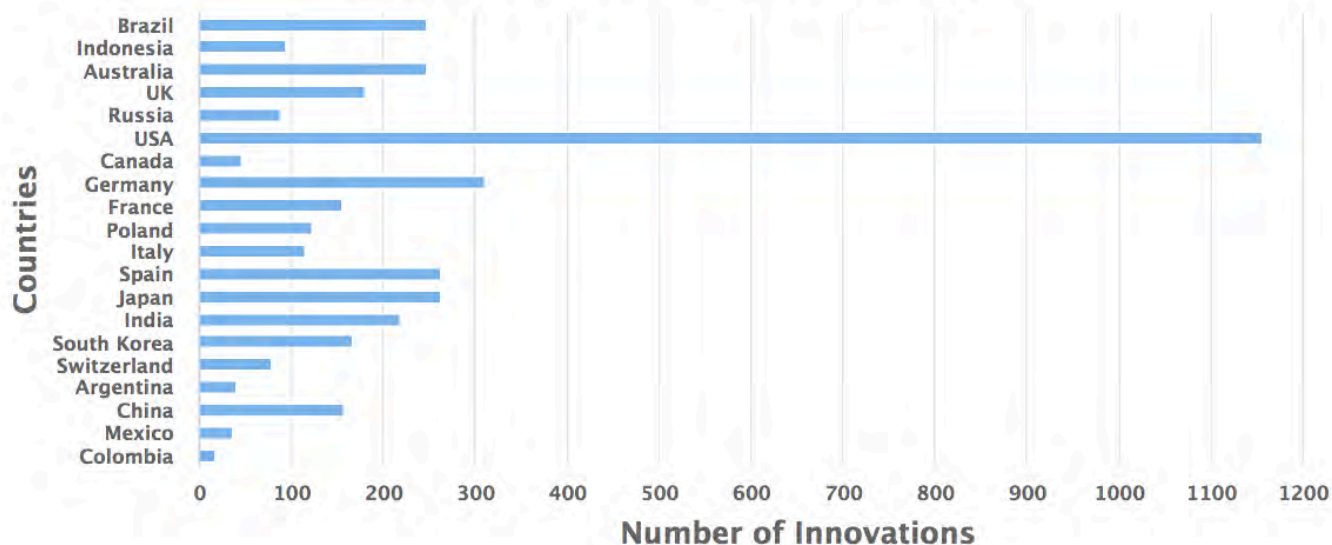


Global Overview – Regional & Country Topline Trends

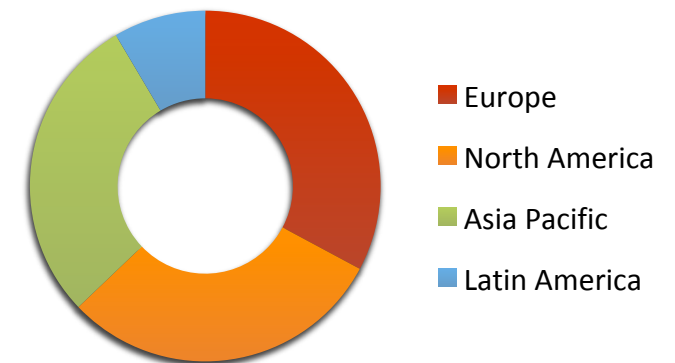
Europe remains the leading regional source of NPD, ahead of North America and Asia Pacific

- Europe (comprising 8 markets) took a 33% share of global NPD activity, with Germany the main source of CHC innovation in the region, while Spain was a particularly vibrant wellspring of NPD in 2020, ahead of the UK, France, Poland and Italy
- North America generated a 30% share of global NPD activity in 2020, with cannabis / CBD still the leading source of new products in the region, ahead of probiotics & prebiotics and herbal & natural immune stimulants, which surged in 2020
- Asia Pacific claims a 29% share of global NPD activity, with multivitamins, probiotics & prebiotics, herbal & natural immune stimulants, antiseptics & disinfectants and herbal & natural joint health the key sources of innovation in the region in 2020
- Latin America's share of global NPD activity in 2020 was around 8%, with Brazil the dominant country in the region, ahead of Mexico and Argentina, and antiseptics & disinfectants, multivitamins and probiotics & prebiotics the main sources of NPD

Global NPD activity: Split by country 2020



Global NPD activity: Split by region 2020



Innovation Showcase – Cough, Cold & Allergy



Brand	Zarbee's Sinus & Respiratory Support
Marketer	J&J
Owner	J&J
Major Category	Cough, Cold & Allergy
Sub-Category	Systemic decongestants
Region	North America
Country	USA
Activity	Launch
Activity Date	April 2020

Details Positioned to support children's sinus and respiratory health all year round. Formulated with African geranium root, used for over 100 years to help maintain a clear respiratory tract. Free from drugs, alcohol, artificial flavours and gluten. Non-drowsy. Berry flavour. Blister in outer box. Average price: \$11.99

Status Supplement

Pack Size 24

Format Tablets - chewable

Dose Children aged 6-12 years: 2 tablets twice daily

Ingredients Per 2 tablets: Proprietary Sinus Support Blend 268mg (black elderberry fruit juice powder, citrus bioflavonoids, African geranium root extract (pelargonium sidoides))

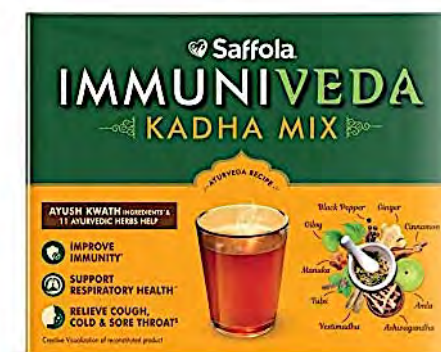
Innovation Ranking ★★

Note also 2 stars awarded for unique formulation. Remedy introduced in conjunction with Sinus & Respiratory Support Syrup daytime and nighttime SKUs based on the same formulation

4. Drink mixes

Ever wider array of supplements sold as drink mixes

- Drink mixes were another delivery format that recorded a much higher level of NPD activity in 2020, with launches concentrated in cannabis / CBD, herbal & naturals, immunity, antidiarrhoeals and OTC tonics drinks
- Unilever's Liquid I.V. range has been a key innovator in this space, with four launches throughout 2020 as part of its Hydration Multiplier line positioned for electrolyte loss
- Nestlé's Celltrient was another key US launch, a range of four VMS products unveiled in October 2020, including three drink mix versions: Protect (against oxidative stress), Energy (B vitamins) and Strength (magnesium + phosphorus)
- Fast-growing Aboca rolled out its range of OTC tonic drinks to Spain in April 2020, including drink mixes positioned to relive fatigue (Refuerzo and Energia)
- In India, Marico unveiled two new Ayurvedic immunity supplements as part of its Saffola ImmuniVeda line, Kadha Tea Mix and Golden Turmeric Milk Mix
- Another notable herbal & natural launch was the Om range in the USA in April 2020, available as Om Mighty Veggie Miso Broth, Om Mighty Beef Bone Broth, Om Mushroom Hot Chocolate Blend and Om Mushroom Coffee Latte Blend
- As for cannabis / CBD, key US drink mix launches in 2020 were Zolt's wide range of 8 products, including Zolt Rise, and Axcentria's Elevate CBD Drink Mixers



Top 10 Marketers by NPD 2020 – P&G, Taisho

7. P&G

- North America was the main focus of P&G's NPD activity in 2020, with Vicks and New Chapter the key brands
- P&G launched New Chapter One Daily Multiherbal vegan capsules (USA) in April 2020, claimed to be “first-of-its-kind multiherbal blend in 1 capsule”, available in 4 options (Sleep Well, Stress Relief, Holistic and Energy Boost)
- As for Vicks, a key launch was Vicks Pure Zzzs All Night, available as extended-release tablets formulated with an exclusive botanical blend as well as BioMelatonin, along with Vicks Immunity Zzzs and Vicks Children's Botanicals
- Probiotic brand Align was extended with two innovations, Align Kombucha On-The-Go and Align Baby Colic Relief
- Medical devices have also been an important source of CHC innovation for P&G, including Opte Precision Skincare System, a beauty wand positioned to get rid of bodily blemishes, and Oral-B iO 9 Series electronic toothbrush

8. Taisho

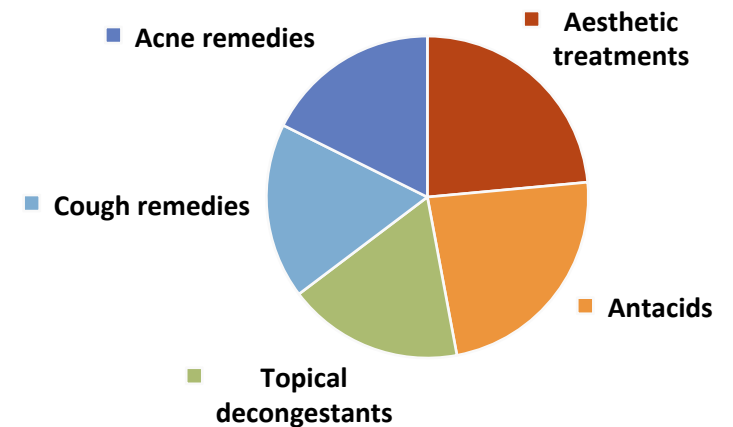
- VMS and Japan were the major focus of NPD activity for Taisho in 2020, with Lipovitan adding various SKUs
- OTC tonic drink Lipovitan was extended with Lipovitan Jelly, Lipovitan Shot for Sports, Lipovitan DX, Lipovitan D Kids (limited-edition Pokémon packaging) and Lipovitan D (limited-edition Space Brothers + Merry Christmas packaging)
- Key VMS launches in Japan included hair & beauty supplements Honzo Yokuinin Tablets S and Alfe Deep Essence, along with supplements for cholesterol reduction (Livita Cholesterol) and diabetic care (Livita Glucocare Tablet)
- Among dermatologicals, key Japan launches in 2020 were haemorrhoid preparation Preser S (in suppository and cream formats), antiseptic & disinfectant Pabron Hand Gel and innovative hair loss treatment RiUP X5 Plus Neo
- Taisho's European subsidiary, Ursa, also launched two new DafalganCaps SKUs (1,000mg and 500mg) in early 2020

Mexico

Derma and Genomma again at the heart of NPD in 2020

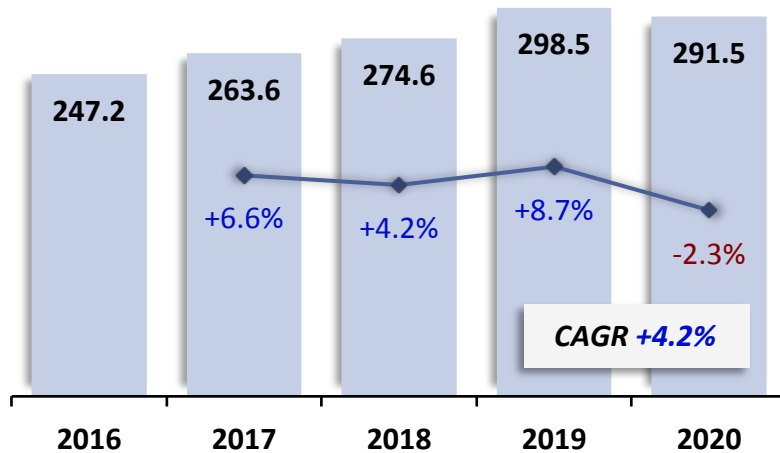
- Dermatologicals was again the standout source of innovation in 2020, while CCA innovation also helped to drive NPD activity, along with VMS and GIs
- Genomma was the leading innovator in the Derma category, launching three line extensions to its acne remedy line Asepxia – in new Carbon Detox mask, liquid soap and wipes formats – as well as aesthetic treatment Cicatricure Agua Micelar Trifasica and antiseptic XL-3 AB Gel Antibacterial Para Manos
- Looking at GIs, Sanofi updated its antacid Melox range, Reckitt launched antacid Picot in two new flavours (Apple, Tropical Fruit) and Sanfer switched laxative Laxoya (sennosides 8.6mg + docusate sodium 50mg) to OTC status
- As for CCA, P&G rolled out its Vicks VapoShower innovation, while topical decongestant NPD focused on seawater sprays Sterimar Béb  (Church & Dwight) and Gotinal (Chinoin)
- Elsewhere in CCA, there were two heder helix (ivy leaf) cough remedy launches in 2020, Genomma’s Tukeli and Sanofi’s Histacil Natix Tos
- Notable VMS innovations included immune supplement, Vita Deyun, claimed to be proven effective in preventing Covid-19 infections, as well as Bayer’s Redoxon AOX, Sanofi’s Pharmaton Woman 50+ and Andromaco’s Kinisi
- Turning to analgesics, there were several launches of note, including Genomma’s ML-PRIM, claimed to be the “only soft capsule formula” in Mexico, as well as Genomma’s Ultra Bengue for joint & muscle pain

Mexico: Top 5 CHC subcategories by NPD activity in 2020

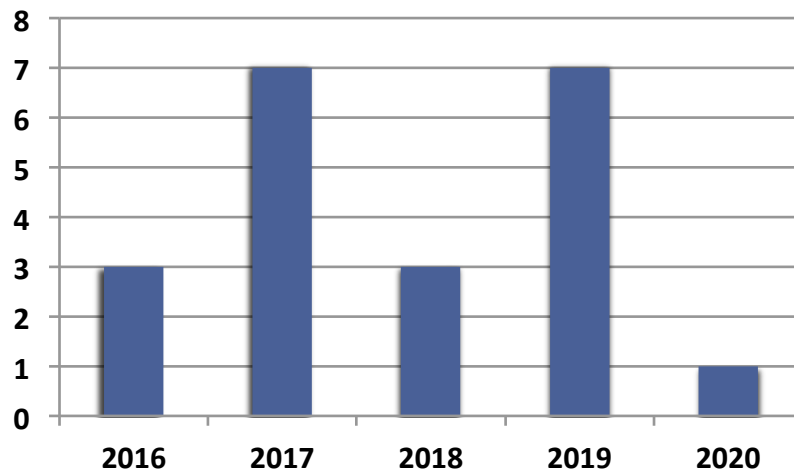


Wow! Brand Case Studies – Otrivin

Otrivin global sales 2016-20
(MSP, \$mn)



Otrivin global NPD activity 2016-20



- Bestselling topical decongestant globally, with strong presence and dynamic showing in Europe particularly, most prominently in Russia, Germany and Nordics, and also in Middle East & Africa
- Heritage brand (Otrivin, Otriven, Otrivine, others with Otri- prefix) with broad geographical presence, although absent from USA and almost non-existent in Latin America; in China, GSK rebranded Otrivin as New Contac Nasal Spray in 2017
- Positioned as a topical nasal decongestant to treat symptoms of cold, flu or allergy, brand consists almost entirely of nasal sprays, with different formulas targeting various demographics
- Most decongestant options are xylometazoline or saline (latter often with herbals); xylometazoline + ipratropium bromide combinations rolled out in certain markets, including Otrivine Extra Dual Relief Nasal Spray in the UK in September 2019



- Recent innovation has focused on opening up new niches, such as nasal swelling (with Otrivin Schnupfen Plus in Switzerland in 2019) and daily nasal hygiene, with the likes of Otrivin Breathe Clean (India) and Otrivin Oddychaj Czysto Dla Dzieci (Poland) in 2020-21