

# Innovation in CHC 2023

NPD & Launch Activity under the Spotlight

*A report drawing on*



**Nicholas Hall's**  
CHC NEW PRODUCTS TRACKER



Thousands of innovations are launched every year in the global consumer healthcare market, but relatively few offer notable new benefits for consumers in terms of delivery format or formulation. Which new products are breaking through and offering a unique proposition? Where will new product development take the CHC market in future?

The latest title from *CHC New Products Tracker* takes an in-depth look at 100 key CHC innovations in 2022, and picks out some of the most prominent delivery format and ingredient trends in the consumer healthcare industry. It examines new product activity by region, country and leading marketer, and explores what the future might hold in terms of CHC innovation.



## **Innovation Showcase – 100 key innovations in 2022**

Showcasing the best CHC innovation of the past year, including:

Analgesics • Cough, Cold & Allergy • Gastrointestinals • Probiotics & Prebiotics • Vitamins, Minerals & Supplements  
Dermatologicals • Self-Diagnostics & Medical Devices • Lifestyle CHC • Sexual Health & Fertility

## **Delivery Format & Packaging Trends**

Highlighting 5 major delivery format trends in the CHC market, including:

Soap bars • Sustainable packaging • Jellies • Child-friendly formats • Novel analgesic formats

## **Ingredient, Flavour & Labelling Trends**

Highlighting 10 major ingredient and labelling trends in the CHC market, including:

Prebiotics • Fenugreek • Tribulus • Angelica • Honey & propolis

## **NPD Activity by Company**

Reviewing innovation by the leading global CHC marketers and some of the smaller companies driving new product activity in the industry.

## **NPD Activity by Region & Country**

Analysing innovation trends by region (North America, Latin America, Europe and Asia-Pacific) and taking a closer look at each of the 20 countries tracked by *CHC New Products Tracker*.

## **Best-in-class Case Studies**

Case studies of top-performing innovations from previous years.

## **Summary & Future Trends**

Setting out what the future might hold for consumer healthcare innovation and where to look for new opportunities. How has Covid-19 shaped new product activity in 2022 and which changes brought about by the pandemic will be long-lasting? What explains the apparent drop-off in terms of the volume of NPD activity and the percentage of high-quality innovation in 2022? Is the CHC market set for greater use of self-diagnostics and personalised medicine and probiotics?



### **About CHC New Products Tracker**

The ultimate competitive intelligence tool, featuring nearly 40,000 launches and innovations, *CHC New Products Tracker* offers powerful search filters to help you visualise and explore the vast archive according to your exact specifications.

Products are graded with a star rating, from 1\* (essentially “me too” and generics) up to 4\* (1st Rx-to-OTC switches in a category, creation of a new CHC class or other major leaps in innovation).  
For a demo or more information, please contact [david.redford@NicholasHall.com](mailto:david.redford@NicholasHall.com)

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## Innovation Showcase – Vitamins, Minerals & Supplements

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**Brand:** Nature's Bay DHA  
**Marketer:** Dr Natural  
**Owner:** By-Health  
**Major Category:** Vitamins, Minerals & Supplements  
**Subcategory:** Fish oils & omega-3  
**Region:** Asia-Pacific  
**Country:** China  
**Activity:** Line extension  
**Activity Date:** October 2022

**Details:** Dr Natural (By-Health) has partnered with China Aerospace Science & Technology Corporation (CASC) to hold a "Dream Future, Stars and Seas" co-operation conference and to launch the first DHA algal oil gift box for children as part of its Nature's Bay range. Within the box are three bottles of 30 liquid capsules containing DHA algal oil, claimed by By-Health to be Gold Standard certified, and positioned to contribute to heart health and overall wellbeing. ARP: RMB428 (\$61.57)

**Status:** Supplement

**Pack Size:** 3 x 30

**Format:** Capsules - liquid

**Dose:** 1-2 capsules per day (for adults take directly, for children cut the end of the capsule and squeeze filling into the mouth)

**Ingredients:** DHA algal oil (Gold Standard certified)

**Innovation Ranking:** ★★★

**Note also:** 3 stars awarded for its highly innovative packaging and high-quality formulation. By-Health also deserves credit for an imaginative tie-up with China's CASC space programme. The product was launched in the run-up to China's 11.11 shopping festival and has been a bestseller on Tmall, according to reports

## 7. PEA / um-PEA

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### PEA-based supplements at the cutting-edge of pain relief

- PEA (palmitylolethanolamide) is a fatty acid amide that has long been a component of food and is now increasingly being found in supplements
- Patented ingredients Levagen and Levagen+ (Gencor) both contain PEA, while Perrigo was the first to market um-PEA, an ultra-micronised version of PEA, in H1 2022 with the roll-out of Nervixen in Germany and Switzerland, sold as tablets positioned for neuropathic and lower back pain and claimed to be more easily absorbed by the body than standard forms of PEA
- Pain relief is also the primary positioning for supplements containing PEA or Levagen / Levagen+, notably Metagenics' summer 2022 launch of Bio Absorb PEA Advanced in Australia, a unique combination of Levagen+, vitamin B1 and patented saffron extract Affron in vegetarian capsules
- In USA, CV Sciences extended its PlusCBD range in March 2022 with PlusCBD Relief, softgels formulated with PEA, CBDA and Levagen+ PEA. CV Sciences markets PEA as a CBD-like compound shown by clinical studies to be an alternative to ibuprofen, positioned to relieve pain and soreness
- A notable UK launch containing Levagen+ was Optimum Nutrition Gold Standard Daily Support, capsules positioned for joint & muscle health with a specific claim to support formation and maintenance of connective tissue
- Finally, one PEA supplement with a different positioning was DonnaPlus+ Sauczare (Ordessa) in Spain, for relief of premenstrual syndrome symptoms



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## Summary – Major NPD Trends

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- Our CHC New Products Tracker service has recorded a stable number of new products being launched over the past 4-5 years, however the number of 3 and 4 star entries dropped significantly in 2021 (104) and 2022 (116) vs 2019 (176) and 2020 (180)
- NPD activity trends have also changed markedly in recent years, as we emerge out of Covid's shadow, with subcategories like sedatives & sleep aids, aesthetic treatments, hair & beauty supplements and eye care all coming to the fore in 2022
- Likewise, subcategories which benefited from a Covid-powered boost in NPD activity, such as herbal & natural immune stimulants and antiseptics & disinfectants, saw that effect wane significantly during 2022. Separately, cannabis / CBD activity also dropped off further, while another trend of note is the rise in topical analgesics and H&N joint health activity in 2022

### GLOBAL: TOP 10 CHC SUBCATEGORIES BY VOLUME OF NPD ACTIVITY, 2020-22

2020: YEAR OF THE PANDEMIC HIT	2021: EMERGING OUT OF THE PANDEMIC	2022: POST-COVID LANDSCAPE
PROBIOTICS & PREBIOTICS	PROBIOTICS & PREBIOTICS	SEDATIVES & SLEEP AIDS
HERBAL & NATURAL IMMUNE STIMULANTS	HERBAL & NATURAL IMMUNE STIMULANTS	MULTIVITAMINS
CANNABIS / CBD	SEDATIVES & SLEEP AIDS	PROBIOTICS & PREBIOTICS
MULTIVITAMINS	MULTIVITAMINS	HAIR & BEAUTY SUPPLEMENTS
ANTISEPTICS & DISINFECTANTS	HAIR & BEAUTY SUPPLEMENTS	AESTHETIC TREATMENTS
SEDATIVES & SLEEP AIDS	ACNE REMEDIES	HERBAL & NATURAL IMMUNE STIMULANTS
HAIR & BEAUTY SUPPLEMENTS	OTHER HERBAL & NATURAL SUPPLEMENTS	ACNE REMEDIES
ACNE REMEDIES	CANNABIS / CBD	TOPICAL ANALGESICS
OTHER HERBAL & NATURAL SUPPLEMENTS	OTHER DERMATOLOGICALS	EYE CARE
TOPICAL ANALGESICS	TOPICAL ANALGESICS	HERBAL & NATURAL JOINT HEALTH