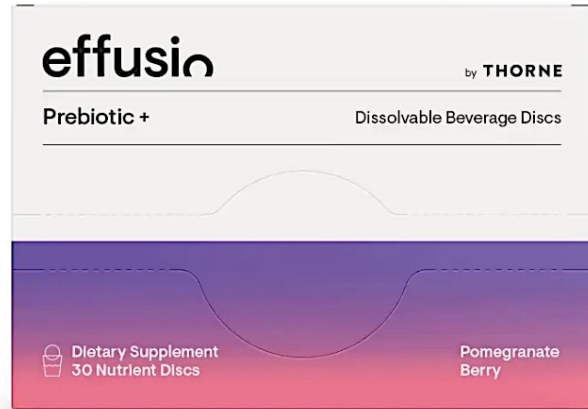


Innovation Showcase – Probiotics & Prebiotics



Brand	Effusio Prebiotic +
Marketer	Thorne
Owner	Thorne
Major Category	Vitamins, Minerals & Supplements
Subcategory	Probiotics & prebiotics
Region	North America
Country	USA
Activity	Launch
Activity Date	January 2021

Details Prebiotic positioned to support digestive health as well as immune function. Contains a unique blend of ingredients. Pomegranate berry flavour. Individually wrapped discs in outer box. RRP: \$42.00 (online only launch)

Status Supplement

Pack Size 30

Format Film - soluble

Dose 1 disc dissolved in any drink of choice once daily

Ingredients Per 1 disc: Aurorablue blueberry complex (fruit, leaf, stem) (vaccinium spp. extract) 100mg, greensselect green tea extract (leaf) (camellia sinesis) decaffeinated 100mg, pomegranate extract (whole fruit) (punica granatum) 50mg, preforpro 15mg

Innovation Ranking ★★★

Note also 3 stars awarded on the basis of original formulation and delivery format. Claimed to be the world's first dissolvable, nutrient-rich drink disc that turns any beverage into a functional drink. Effusio Sleep + was launched at the same time in January 2021, while Effusio Immune + was launched in late 2021

1. Aloe vera

Aloe vera launch activity reaches an all-time high in 2021

- New products formulated with aloe vera have steadily risen in number over the past 10 years, peaking in 2021, in line with growing interest in naturals
- Leading CHC marketers GSK, P&G, Reckitt and J&J all launched several aloe vera formulated products in 2021. Established CHC brands Gaviscon (Reckitt) and Voltaren (GSK) were both extended with natural line extensions
- Reckitt extended antacid Gaviscon with GaviNatura across Europe in 2021, formulated with aloe vera polysaccharides along with mallow and limestone
- In addition, GSK extended its topical analgesic range with VoltaNatura, launched in various European markets in late 2021. It is the first natural option in the range, formulated with aloe vera and other herbals & naturals
- Other established CHC brands extended with aloe vera products in 2021 included Otrivine Natural Daily Nasal Wash with Aloe Vera (GSK) in the UK and Vicks Sinex Saline Ultra Fine Nasal Mist with Aloe (P&G) in the USA
- J&J extended its Clean & Clear acne brand in 2021 with a new US line, Clean & Clear Aloe Vera Acne-Prone, available in calming gel moisturiser, gentle cleanser and body wash, all formulated with aloe barbadensis leaf extract
- Aloe vera also appeared in the formulation of several innovative CHC launches in 2021 including Calmino's IBS remedy PROIBS (Switzerland), The Beemine Lab's Cannabis Pleasure Gel (Spain) and Virostop Nasal Spray (UK)

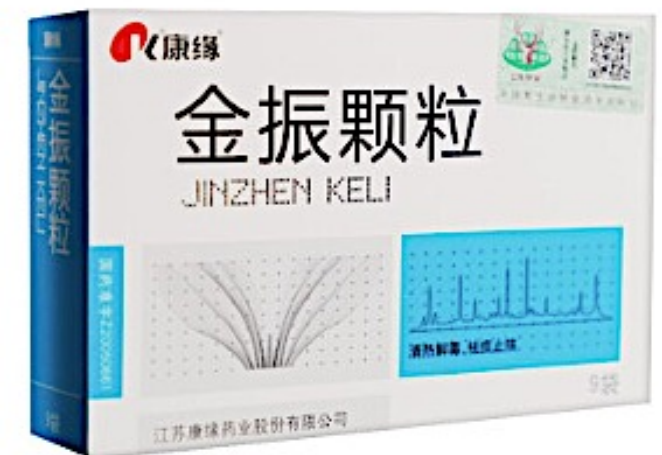
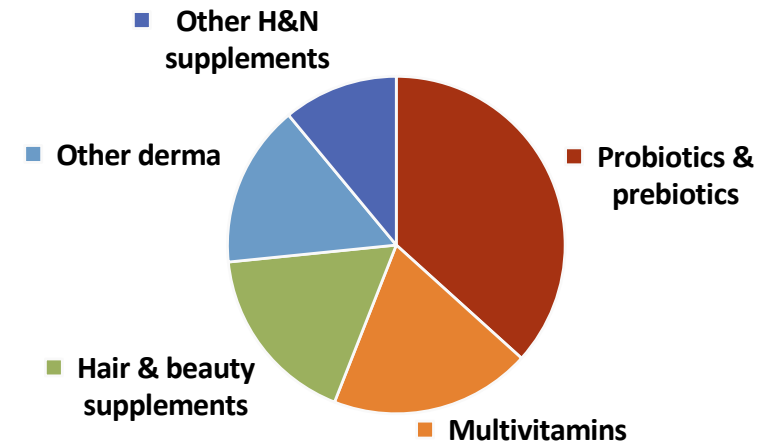


China

Probiotics, multivitamins still the main NPD drivers in China

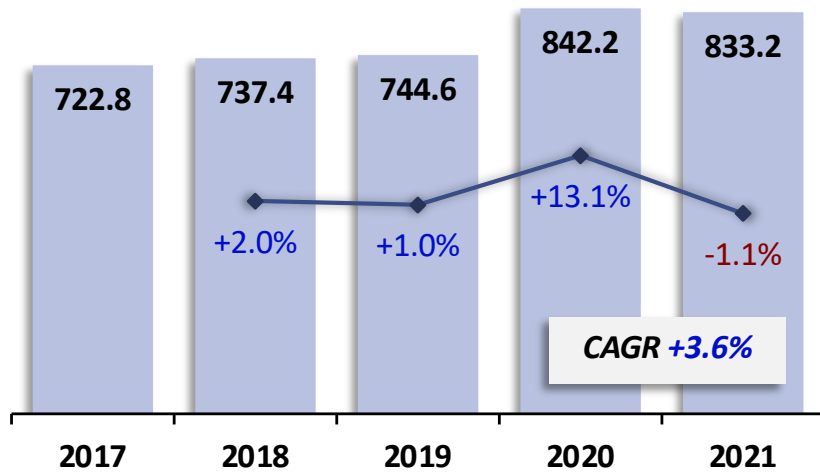
- NPD activity in 2021 was predominantly driven by VMS – accounting for around two-thirds of all launches – led by probiotics and multivitamins
- Among probiotics, GenieBiome’s launch of G-Niib Immunity Pro and G-Niib Immunity+ was a major new arrival, claimed to be the first clinically-backed, microbiome-based immunity formulas, both developed for Asian people
- As for multivitamins, Bayer introduced its One A Day Fruit Bites range in China in 2021, while Holland & Barrett launched its ABC Plus and ABC Plus Senior products and By-Health unveiled Pentavite in liquid and drops
- Notable hair & beauty supplement launches included Ortu Oral Hyaluronic Moisturising Powder (in coconut and blueberry versions) and WonderLab Oral Hyaluronic Acid Gummy (Bloomage Biotech), in a unique format
- Among other dermatologicals, Bayer’s new Bellerain Air range of three body lotions – in three seasonally coloured bottles – was a notable introduction
- OTC switch activity was again high in China in 2021 (with a focus on TCMs), including sore throat remedies Er Ding Pian (Sichuan Jinhui) and Huangshi Xiangsheng (Jimin Care), as well as cough remedy Jinzhen Keli (Kanion)
- Other notable OTC switches included topical analgesic Felbinac Gel (Lingrui), eye care treatment Hylo Comod (Ursapharm), antacid Xiao Er Qixingcha Granules (Shaanxi Dongtai) and calcium supplement Wuwei Pu Gai (Dikang)

China: Top 5 CHC subcategories by NPD activity in 2021

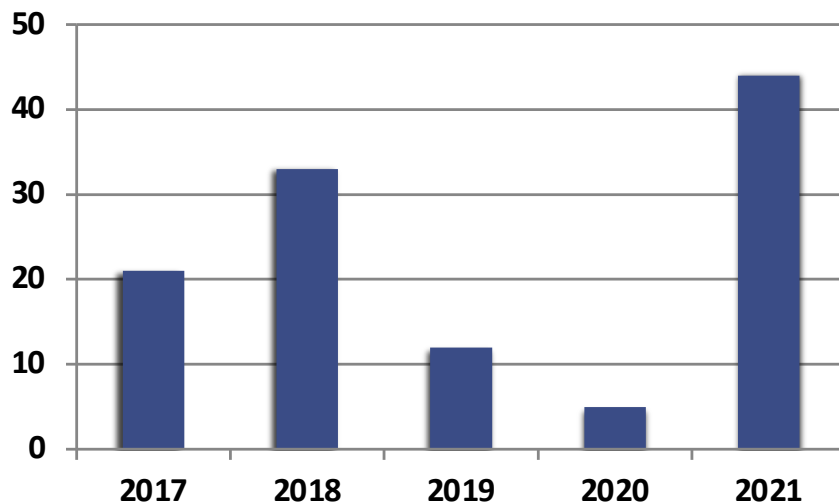


Wow! Brand Case Studies – Centrum

Centrum global store retail sales 2017-21
(MSP, \$mn)



Centrum global NPD activity 2017-21



- GSK's global No.1 VMS brand Centrum recorded a clear upsurge in NPD activity in 2021 after two relatively fallow years, with USA, China and Australia the three countries benefiting most
- In 2021, GSK launched Centrum Wellness Packs in USA and China in 20+, 30+ and 40+ gender-specific versions, each featuring a daily multivitamin plus three additional supplements to support each age group (50+ and 60+ versions also available in USA)
- In Q2 2021, GSK added Multicentrum Immuo C effervescent granule sachets (14, 28-count packs) in Spain, while in Q3 2021 Centrum Pró-Imunidade (30, 60-count packs) launched in Brazil
- In Australia, GSK extended Centrum with the Centrum Benefit Blends series. The line comprises eight supplements designed to deliver distinct health benefits based on specific health goals, including Beautiful & Bright, Calm & Collected, Collagen Boost & Glow, Energise & Go, Immune Defence & Recovery, Movement & Mobility, Mind & Memory and Rest & Renew



- In South Korea in Q3 2021, GSK extended Centrum multivitamin into the probiotics category with Centrum Focus Synbiotic 100
- GSK also extended Centrum in the US market with new whole food and organic lines

Summary – Major NPD Trends

- In the years 2016-18 launch activity was fairly stable in terms of which subcategories dominated NPD, with multivitamins and probiotics & prebiotics the top two in all three of those years. **Since 2019, however, NPD trends have been more volatile**
- First we had the rapid rise of cannabis / CBD in 2019, driven by an upsurge in NPD in the US market. This trend very clearly **peaked in 2019 and over the past two years we've seen a noticeable drop-off in activity** globally, but particularly in USA
- While Covid negatively impacted demand for CBD, it simultaneously caused a **rapid rise in NPD for herbal & natural immune stimulants, which persisted into 2021**. Meanwhile, probiotics have maintained a consistent level of NPD throughout this period, reflection their versatility and ability to respond to the latest trends, such as the launch of probiotics for immunity

GLOBAL: TOP 10 CHC SUBCATEGORIES BY VOLUME OF NPD ACTIVITY, 2019-21

2019: BEFORE COVID



2020: YEAR THE PANDEMIC HIT



2021: EMERGING OUT OF THE PANDEMIC

