

Innovation in CHC 2021

NPD & Launch Activity under the Spotlight

A report drawing on  **Nicholas Hall's**
CHC NEW PRODUCTS TRACKER

This all-new title from *CHC New Products Tracker* takes an in-depth look at 100 key CHC innovations in 2020, 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

 **Nicholas Hall's**
CHC REPORTS

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NPD & Launch Activity under the Spotlight

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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?

Table of Contents

Global Overview

Assessing the global picture in terms of consumer healthcare innovation in 2020, including the key trends that defined the year in NPD

Innovation Showcase – 100 key innovations in 2020

Showcasing the best CHC innovation of the past year, including:
Analgesics • Cough, Cold & Allergy • Gastrointestinals • Probiotics & Prebiotics • Vitamins, Minerals & Supplements • Immunity • Dermatologicals • Lifestyle CHC • Self-Diagnostics • Digital Health

Delivery Format & Packaging Trends

Highlighting 10 major delivery format trends in the CHC market, including: “Enhanced” Water • Oral, Nasal & Facial Sanitisers • Chews • Drink Mixes • Stick Packs • Clothing • Oral Films & Strips • Extended Release • Masks & Filters • Convenience Kits • Condition-specific Packaging

Ingredient, Flavour & Labelling Trends

Highlighting 10 major ingredient and labelling trends in the CHC market, including: “Clean” Ingredients • Passiflora • L-theanine • Hesperidin • Ivy Leaf / Hedera Helix • Algae & Lichen • Fermented Teas • NMN • Mushroom • Elderberry

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 including: J&J / Sanofi • Reckitt / Bayer • GSK / Nestlé • P&G / Taisho • Evalar / Unilever

Innovation 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*

Wow! Brand case studies

Case studies of top-performing innovations from previous years including: Vicks • Otrivin • Zarbee's • Swisse • Olly

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 2020 and which changes brought about by the pandemic will be long-lasting?

About CHC New Products Tracker

The ultimate competitive intelligence tool, featuring close to 30,000 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.

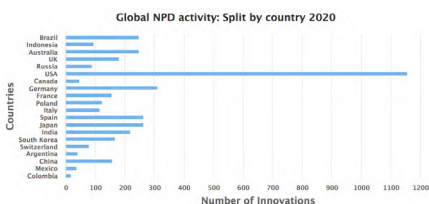
Products are graded with a star rating, from 1* (essentially “me too” and generics) up to 4* (1st Rx-to-OTC switches in a category, creation of a new CHC class or other major leaps in



Global Overview – Regional & Country Topline Trends

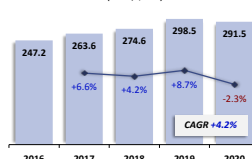
Europe remains the leading regional source of NPD, ahead of North America and Asia Pacific

- 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

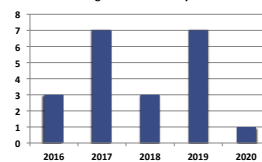


Wow! Brand Case Studies – Otrivin

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



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



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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



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 Multiterbal vegan capsules (USA) in April 2020, claimed to be "first-of-its-kind multiterbal 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 Youkinin 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 XS Plus Neo
- Taisho's European subsidiary, Upsa, also launched two new DafalganCaps SKUs (1,000mg and 500mg) in early 2020



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 relieve 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 Acentria's Elevate CBD Drink Mixers



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