

Innovation in CHC 2022

NPD & Launch Activity under the Spotlight

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

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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 2021, 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.

Global Overview

Assessing the global picture in terms of consumer healthcare innovation in 2021, including the key trends that defined the year in NPD

Innovation Showcase – 100 key innovations in 2021

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:
Massaging roll-ons • Powder-to-liquid formats
Wipes • Beverage discs • Personalised packs

Ingredient, Flavour & Labelling Trends

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

Liquorice • Seaweed / Carrageenan • Saffron • Cannabigerol (CBG)
Moringa • Phosphatidylserine • Aloe vera • Sea buckthorn • Holy basil (tulsi)
Mushrooms - Chaga, Lion's mane



Innovation by Marketer

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

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 Bepanthen, Centrum & Cetaphil

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 2021 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 2021? 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 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 innovation).

For a demo or more information, please contact waisan.lee@NicholasHall.com

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 Gavison (Reckitt) and Voltaren (GSK) were both extended with natural line extensions
- Reckitt extended antacid Gavison with GavNaturale across Europe in 2021, formulated with aloe vera polysaccharides along with mallow and limestone
- In addition, GSK extended its topical analgesic range with VoltaNaturale, launched in various European markets in late 2021. It is the first natural option in the range, formulated with aloe vera and other herbs & naturals
- Other established CHC brands extended with aloe vera products in 2021 including 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 Calmin's 185 remedy PROBIS (Switzerland), The Beehive Lab's Cannabis Pressure Gel (Spain) and Virostop Nasal Spray (UK)



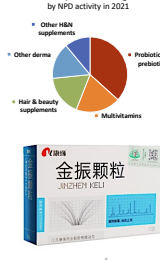
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China

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, Gentile's launch of G-Nib Immunity Pro and G-Nib Immunity+ was a major 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 Pentaxite in liquid and drops
- Notable hair & beauty supplement launches included Oriu 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 Qing Pian (Shuan Jinhu) and Huangshi Xiangsheng (Jintu Care), as well as cough remedy Jintuhen Kei (Kanion)
- Other notable OTC switches included topical analgesic Felbina: Gel (Lingrui), eye care treatment Hilo Comod (Lisapharm), antacid Xiao Er Qingcha Granules (Shaanxi Dongta) and calcium supplement Wuwei Pu Gai (Dikang)

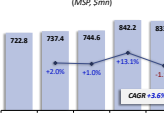
China: Top 5 CHC subcategories by NPD activity in 2021



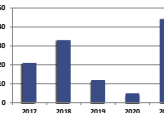
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Wow! Brand Case Studies – Centrum

Centrum global store retail sales 2017-21



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 Q3 2021, GSK added Multicentrum Immuno C effervescent granule sachets (14, 28-count packs) in Spain, while in Q3 2021 Centrum Pro-Imunidade (30, 60-count packs) launched in Brazil
- In Australia, GSK extended Centrum with the Centrum Benefits 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, Energie & 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 Symbiotic 100
- GSK also extended Centrum in the US market with new whole food and organic lines

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