

Innovation in CHC

NPD & Innovation in CHC under the Spotlight

A report drawing on



This all-new title from Nicholas Hall's Reports takes an in-depth look at 100 key CHC innovations in 2019, 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 2019, including the key trends that defined the year in NPД

Innovation Showcase – 100 Key Innovations in 2019

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

- Analgesics • Cough, Cold & Allergy • Gastrointestinals
- Probiotics & Prebiotics • Vitamins, Minerals & Supplements • Dermatologicals • Self-Diagnostics
- Lifestyle CHC • Cannabis / CBD

Delivery Format Trends

Highlighting 10 major delivery format trends in the CHC market, including:

- Candies • Drinks, Teas & Pods • Gummies • Tri-layer Tablets • Oral Gels • Roll-ons • Vape Pens & Inhalers

Ingredient Trends

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

- Chocolate • MCT / Coconut Oil • Elderberry
- Mushroom • Fixed-dose Combinations
- Vegan, Gluten-free & Organic



2. Drinks, Teas & Pods

Supplements in ever wider array of drinkable formats

- Liquid drink formats have been a hot delivery format trend in CHC over recent years, with the number of innovations swelling as a result of increased numbers of probiotics and CBD supplements sold as drinks
- Teas are also a format gaining traction recently, with traditional digestive remedies and sedatives & sleep aids two categories driving this trend
- Pods (to be inserted in drink dispensers) have also risen in popularity, powered by innovators such as Tespo. In 2019 Tespo signed a deal with Pharmavite / Otsuka making Nature Made the first third party brand to be licensed for use of Tespo's newest WiFi dispenser, resulting in the launch of multivitamin Nature Made Multi For Him and Nature Made Multi For Her
- As with coffee pods, Tespo and similar next-generation VMS delivery systems also require users to purchase their branded customised dispenser so the consumer's financial investment is significant. It remains to be seen whether such one-use dispensers will be a deterrent or act as a loyalty lock
- Among the many innovative liquid drink formats launched in 2019, there were several US probiotic launches, including Good Culture Wellness Probiotic – "gut shots" with organic left- and right-side probiotics, as well as notable cannabis / CBD launches like Tribe Hemp CBD Shots. In China, a key launch was hair & beauty supplement Chinelle E-Jiao Oligopeptide Essence Drink, capitalising on the popularity of "shots" and mini-drinks in Asia
- Among teas, highlights among the many 2019 launches were IBSA's French launch of Chondrobal Natural Infusion Anticellulites, for stiff joint relief, Kestrel's UK launch of its Vocalzone sore throat range (primarily for singers) and Tetley's roll-out of its fortified tea line to Canada



Innovation Showcase – Analgesics



Brand	Dolostop Plus
Marketer	Kern
Owner	Kern
Major Category	Analgesics
Sub-Category	Systemic analgesics
Region	Europe
Country	Spain
Activity	Line extension
Activity Date	September 2019

Details
Indicated to provide symptomatic relief from mild to moderate pain in adults. Claimed to be the first and only paracetamol and ibuprofen combination available in Spain for the occasional symptomatic treatment of mild/moderate pain in adults. Blister in outer box. Average price €6.71 (US\$7.87)

Status
OTC

Pa's Size
36

Format
Tablets – film coated

Dose
Adults 18 years+: 1-2 tablets every 6 hours

Ingredients
Per 1 tablet: Paracetamol 500mg, Ibuprofen 150mg

Innovation Ranking
Not applicable

Note also:
Follow on from various remedies in Kern's range of analgesics and is the first OTC painkiller to combine paracetamol and ibuprofen in the same formulation in Spain



Indonesia

Acne remedies the key driver of 2019 innovation

- Dermatologicals were by far the main source of CHC innovation in Indonesia in 2019, followed by VMS and Cough, Cold & Allergy. Gastrointestinals and Lifestyle CHC also made a contribution, but Analgesics lagged far behind
- In terms of leading subcategories by innovation activity, acne remedies was a long way out in front in 2019, ahead of cough remedies and herbal & natural immune supplements. Intimate care and eye care complete the Top 5
- Although innovations were limited in Indonesia during the reporting period there was a notable 3rd product: Ifree (Eglin), a medical device (heat patch) specifically designed to relieve menstrual pain without the use of drugs. 3rd were awarded owing to its natural "Qiyehat" process
- Looking at innovation by marketer, Soho Global Health was the most active company in 2019, launching Imboost Lozenges for sore throat and Imboost Effervescent for immune support, and Laing Extra Strength for constipation. Soho Global Health also relaunched Dapet Anak antidiarrhoeal
- Other key marketers in terms of CHC innovation in 2019 were Esthetics International and Emina Cosmetics, both of which introduced several acne remedy SKUs, as well as CombiPhar and DKT. In addition, Bayer introduced Redoxon Triple Action and P&G added a new Vicks Inhaler with a keying

Indonesia: Top 5 CHC subcategories by innovation in 2019



6. Elderberry

US immunity category sees raft of elderberry launches

- Elderberry innovation has steadily risen over recent years, reaching an all time high in 2019, driven by new herbal & natural immune supplements
- In late 2019, New Chapter (P&G) launched two new US immunity products, New Chapter Elderberry Powder (for on-the-go use) and New Chapter Elderberry Syrup, both claiming a high dose of concentrated elderberry
- Other leading CHC marketers that launched US elderberry supplements in 2019 include RB (Airborne Elderberry Gummies), GSK (Children's Dimetapp Immune Support), Unilever (Oily Active Immunity + Elderberry and Oily Active Sleep + Elderberry) and Pfizer (now GSK) (Emergen-C Elderberry Immune+)
- J&J added six new products containing elderberry to its recently-acquired Zarbee's Naturals range in early 2019, including cough remedies and immune stimulants, while PharmaCare extended the veteran Sambucol line in USA with Sambucol Advanced Immune
- In Russia, Hedega launched Camolis Pastilles for sore throat in February 2019, featuring a complex natural formulation including elderberry
- In China, Nestlé's Garden of Life division rolled out mykind Organics Elderberry Immune, available as gummies and a syrup, while Dongle E-Jiao launched Chinelle E-Jiao Oligopeptide Essence Drink, containing concentrated elderberry juice
- In Korea, Abn-Good relaunched its Kolasa Elderberry line in 2019 and K&M launched Pororo Sambucus, an immunity supp formulated with elderberry



Innovation by Marketer

Reviewing innovation by the leading global CHC marketers 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*

Summary & Future Trends

Setting out what the future might hold for consumer healthcare innovation and where to look for new opportunities. Will the market see more collaboration with start-ups specialising in delivery format and ingredient R&D? Is the CHC market set for greater use of AI and personalised medicine? Will new consumer-oriented delivery formats be inspired by the food & drink industry or other FMCG sectors?



About CHC New Products Tracker

The ultimate competitive intelligence tool, featuring 23,000+ 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 OTC class or other major leaps in innovation).

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



PAYMENT FORM: INNOVATION IN CHC

NPD & Innovation in CHC under the Spotlight

A global licence will be required if you wish to put this report on your company's intranet. The report will be sent in PDF format to the purchaser via a secure link. If a print copy is required, please request this upon purchase. All prices are quoted in British Pound Sterling.

Please tick as appropriate. I would like to order:

Full report:

- ☐ Global Licence
☐ Site Licence

List Price:

GBP £9,000
GBP £6,750

PAYMENT DETAILS

Mr/Mrs/Ms/Dr/Other _____ First Name _____

Last Name _____ Job Title _____

Company _____ Address _____

Post/zip code _____ Country _____

Tel _____ Fax _____

Email _____

PAYMENT DETAILS

- ☐ Please send me a secure link so I can pay by credit card
☐ Please invoice my company quoting order number / reference: _____
(material will be sent when full payment is received)
VAT ID Number (EU only): _____

Signed: _____ Date: DD / MM / YYYY

If you do not wish to receive future information from us, please tick as appropriate:

☐ Mail ☐ Email

For enquiries or orders please contact Melissa.Lee@NicholasHall.com



Nicholas Hall Group of Companies offers the world's most complete consumer healthcare marketing & business solutions

Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in consumer healthcare, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

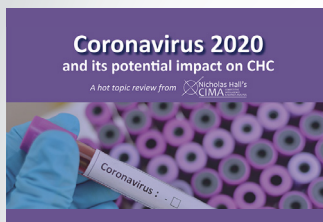
Latest Nicholas Hall Reports:



Innovation in CHC

A report on 100 key CHC innovations in 2019 and some of the most prominent delivery format and ingredient trends in the industry. It examines new product activity and explores what the future might hold in terms of CHC innovation.

April 2020



Coronavirus 2020

This special Hot Topic review from Nicholas Hall's CIMA (Competitive Intelligence & Market Analysis) division explores the Coronavirus 2020 and its potential impact on CHC.

March 2020



CBD 2020

This feature report dives into the issues surrounding when and how players should respond to the enormous commercial potential of CBD, across diverse healthcare and retail categories.

March 2020



Digital Marketing & e-Commerce

Digital Marketing is now considered by many Consumer Healthcare players to be the most important way to engage with consumers and healthcare professionals.

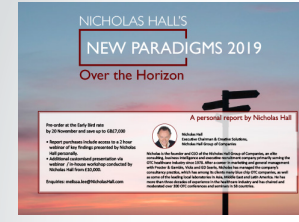
November 2019



VMS

Access key insights and essential knowledge of strategies, launches, emerging segments and new opportunities in the VMS market with the latest essential title from Nicholas Hall's Reports.

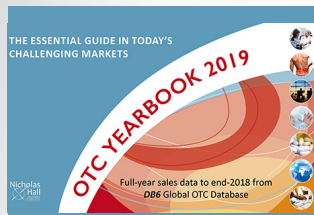
September 2019



New Paradigms 2019

Focusing on major issues surrounding the CHC Market, including Innovation, Distribution, Digital Engagement, Competition and much more, this is an essential read for all players striving to compete in this evolving marketplace.

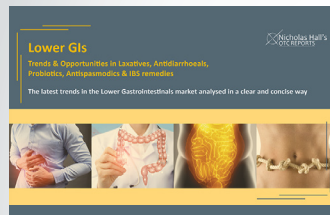
August 2019



OTC YearBook 2019

Featuring expert analysis and incorporating full year-end 2018 data from the only dedicated worldwide CHC database, Nicholas Hall's unique and invaluable DB6 Global CHC Database.

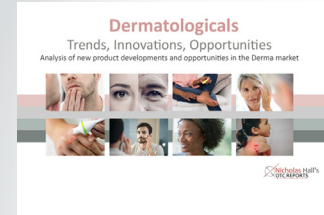
April 2019



Lower GIs

An in-depth exploration of the Lower GIs market, including Laxatives, Antidiarrhoeals, Antispasmodics & IBS remedies and Probiotics. Landscaping major markets, with topline sales, brand performances, launches and ad campaigns.

March 2019



Dermatologicals

Access key insights and essential knowledge of the most important launches and emerging segments in the Dermatologicals market. Categories covered include Acne, Anti-ageing, Antifungals, Cold sore treatments, Cosmeceuticals, FIC and more.

December 2018



Sleep

This report investigates the competitive landscape in 12 key markets, establishing trends & developments, barriers to growth and emerging niches. Charts segment the market by ingredient and show proportion of sales generated by herbals & naturals.

October 2018



Herbals & Naturals

This report examines the biggest and most exciting Herbals & Naturals categories in 9 leading global markets, from probiotics and herbal cough remedies to natural laxatives, topical analgesics and supplements for heart health, immunity and memory.

September 2018



Cough & Sore Throat

This report investigates the factors driving growth in the Cough & Sore Throat category, and those holding it back, considering what needs to change if higher growth is to be achieved, with detailed case studies of successful brand strategies.

June 2018

Get in touch!

Discover the world of CHC with the Nicholas Hall Group of Companies. Our range of services covers everything from consultancy and competitive intelligence to events and executive recruitment. Whatever your needs are in consumer healthcare, we'd like to hear from you! Contact Melissa at Melissa.Lee@NicholasHall.com

Nicholas Hall Europe Ltd, 35 Alexandra Street, Southend-on-Sea, SS1 1BW, UK
E: info@NicholasHall.com • W: www.NicholasHall.com • T: +44(0)1702 220 200

