

Nicholas Han's

# NEW PARADIGMS FOR CHC 2023

## **The Future Resumed**

### **Draft Table of Contents**

#### **Foundation Chapter: The Future Resumed**

History of the Market

10 Steps to Heaven

Forecasts for the Mainstream Retail Sector

2018-2022 (and a little further back)

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#### **CHC Covid Aftermath**

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Vitamins, Minerals & Supplements  
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Analgesics  
CCA  
Dermatologicals  
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Building Female Franchises

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Mental health problems soar during Covid-19 / Economic Worries

WHO Declares Sleep Pandemic

Sleep Quality

Is the sales boost in sedatives and sleep aids sustainable?

Will Switch be a factor in Sleep?

Consumer Access to Melatonin

Paediatric Options for Sleep

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CBD for Sleep and Anxiety?  
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Education is central to expanding the Reach of EHC  
Is a Male Contraceptive Pill Viable and is there demand?  
Condoms: Socially-Conscious Marketing  
Natural and Non-Medicated Menstrual Pain Relief  
NPD in the PMS Segment  
Intimate Care  
Impact of HRT on CHC Menopause Alternatives  
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Premature Ejaculation Treatments  
Prenatal Vitamins  
STDs

## **Companion Products for Debilitating Diseases (Obesity, Diabetes, Cancer, Alzheimer's, Cardiovascular)**

Obesity a Huge Determinant of Health

Surge in Obesity and Overweight Numbers by 2035

Obesity Crisis is a Huge Opportunity for CHC

CHC Obesity Solutions

Latest Research and Opportunities

Evidence-Backed Brands

Importance of Lifestyle Change to the Weight Loss Journey

Apps & Wearables

Competition from Rx Options

Obesity and the Link to other Health Conditions

## **Digital Revolution**

Digital Health – the Key to Patient Centricity?

Big Data: Providing Targeted User Experiences and Unlocking Innovation

Medtech: The Promise and Pitfalls of Adoption

Connecting with Consumers: Targeted and Meaningful Digital Communication

AI and the Changing Face of SEO

Ethical Considerations in the Digital Age

Digital and Demographics

E-Commerce and the Change in How Consumers Shop

Hyper-Personalised Service

Personalisation of Products

## **Sustainability, beyond Social Responsibility**

Regulations: Due Diligence

The Triple Bottom Line: People Planet Profit

ESG Reporting

Collaborate to Progress

Innovation in Packaging & Recycling

Communicating Sustainability

Being in the Wellbeing Business

Interconnectedness

## **Emerging Markets**

Big Idea and Introduction

Emerging markets definition

Emerging markets KPI's and Performance

Forecast trends (GDP)

Trends profiling EM (not a subchapter but information that provides context)

Emerging markets profiles

Overall selected Emerging Markets CHC performance

Brazil – China – India – Indonesia – Mexico - South Africa –

Turkey – Egypt – Pakistan – Philippines – Thailand - Colombia -

Bangladesh – Iran - Nigeria - Vietnam

Overall economic outlook

Healthcare

Overall outlook

Benefits

What is it that makes it so attractive

Drivers

Barriers

Barriers to enter

Downside

Implications

OTC market evolution with categories

Chart of 5 top seller: sales, CAGR, SOM total OTC

Top 5 brand – name, who – category – sales – growth

How to succeed in EM

Summary: 16 Emerging Markets briefly

## **China**

Xi Jinping plans economic reset, walks a tight-rope between Russia and the West and continues with the Made in China 2025 plan.

Should I stay, or should I go? - Reshoring is appealing but has issues for pharmaceutical companies.

The spectre of Covid continues to haunt supply chains, but with lockdowns easing it's a positive outlook for CHC.

Fears for a repeat of the 2008 financial crisis but China's CHC market rebounds.

Covid-19 changes preferences as interest shifts from overseas supplements to TCM.

The NMPA seeks to incentivise innovation, but new regulations may impact pharmaceutical companies.

How to get ahead in advertising: China's overcrowded market and how brands can carve out a space online.

Competition for e-commerce giants and regulatory clampdown on e-commerce.

The meteoric rise of Douyin, shopping festivals and allowance of the sale of OTC drugs.

China's fragmented pharma market makes moves towards consolidation, M&A activity dynamic.

Efforts to improve investor environment and potential in the western provinces.

China Vs America: symbiosis and antagonism.

Technological advancement, AI and R&D.

Gen X goes green, eco market provides opportunities.

Prevalence of "sang culture" and "me mentality", consumer focus on health & wellness following Covid-19.

Population imbalance, China's shift from a 3rd to 1st world economy and issues of an ageing population.

CHC product trends and rising category opportunities.

Key health issues and lifestyle trends.

Top marketer and retailer activity, brands target youth & the modern consumer and rebound from pandemic effects.

Summary: What does this mean for a CHC business in China?

## **Distribution, e-Commerce, The Patient Journey**

Distribution Overview

Retail Category Management

Pharmacy / Mass Market Split

Pharmacy Point-of-Care

Pharmacists post-COVID-19

Leading Pharmacy Chains

Chain Store Case Studies

GSL (General Sales List)

Self-selection in other markets

In-store Clinics Model

Private Label

Mass market

eCommerce

Subscription Model

Network / MLM Marketing

Shopper Insights

Patient / Consumer Journey

Other Key Global Trends

## **Competition**

2023 Top 20 players at a glance and group clusters

Key Highlights top 20

Cluster analysis:

MNCs + True Pharma

MNCs + FMCG

Local companies

Who should not be in this list

Best profile for success

## **M&A**

Key trends in healthcare M&A

Why M&A?

Types of M&A Models

Who buys

Who sells

Advise & watch outs

High valuation multiples

Updated chart of multiples

Industry Leader growing through M&A + JV + Divestitures

Renovate, build revenue and accelerate growth - Nestle

Bountiful to Buy scale

Renovate, build revenue and accelerate growth - Clorox Renew

Life probiotics

New geography - Taisho going global through UPSA Bristol

Meyers purchase

PE buying business with scale - Cooper Consumer Health to be acquired by CVC Capital Partners

Expertise in women's health (rounding up portfolio) - HRA

Pharma to be acquired by Perrigo

Buying channel of distribution - Retail - B&M to e-commerce

Orkla buying Healthspan

## **Managing Brands for Long-Term Profit Growth**

Building trust in a brand (beyond its science)

Managing price increases

Driving brand growth

Brand management during JVs and M&As

Successful Rx to OTC switching

Competing in a category dominated by generics



## Skills required today in brand management

*NB this is a draft table of contents as the report is still being written so Nicholas Hall Group of Companies reserves the right to change this prior to publication.*

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