



Herbals & Naturals

Trends, Developments, Opportunities

Latest trends & growth drivers • Herbals & Naturals sales segmented • Launch activity & NPD
Regulations • Recent A+P campaigns • Forecasts & opportunities



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Trends, Developments, Opportunities

The report features mid-2021 CHC sales data from our dedicated **DB6** database, plus forecasts to 2025 & 2030.

Dedicated Executive Summary and Outlook chapters draw out the key findings.

Each market profile features:

- Overview of trends, developments & sales
- Split of CHC sales between H&N and non-H&N sales by major category
- Leading H&N marketers
- Regulations and classifications
- Category analysis includes latest topline and brand level sales data, plus NPD and promotional activity
- Key trends & developments explored for each category, plus detailed brand coverage
- Outlook, forecasts and opportunities

Successful and innovative brands are cherry-picked for individual case studies that highlight developments, sales and success strategies

Markets profiled in dedicated chapters



Areas covered by the report

Pure herbal & natural categories

- Probiotics
- Herbal & natural joint health
- Herbal memory & brain health
- Herbal menopause supplements
- Herbal antidepressants
- Other herbal & natural supplements, including
 - Co-enzyme Q10
 - Fish oils & omega-3
 - Garlic
 - Ginseng
 - plus GLA, Lecithin, Royal jelly

Herbals & naturals within selected mixed* categories

- Topical analgesics
- Cough remedies
- Laxatives
- Sedatives & sleep aids
- Urinary products, Prostate remedies

* categories featuring both H&N and non-H&N brands

Herbals & Naturals

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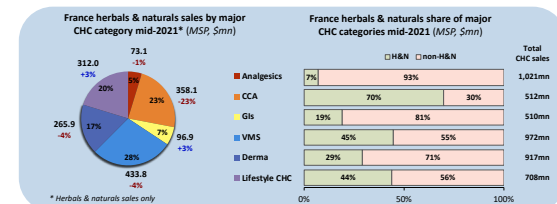
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France | Overview



- Cough remedies** – both H&N and non-H&N – suffered big decline in year to mid-2021 amid weaker cold & flu rates during the Covid-19 pandemic; many herbal & natural brands (but not homeopathics) had grown well in recent years
- Smaller herbals & naturals** sales held strong during Covid-19 pandemic owing to sedentary lifestyles and poor diets, with the smaller herbals & naturals category performing better than non-H&N
- Sedatives & sleep aids** – both the larger H&N category and smaller non-H&N – grew well in the year to mid-2021 owing to increased stress & anxiety caused by the pandemic
- Urinary products** declined slightly; marketers are looking to engage the market with NPD such as soluble stick formats
- Prostate remedies** are heavily reliant on reimbursement, although there are some consumerised supplement brands

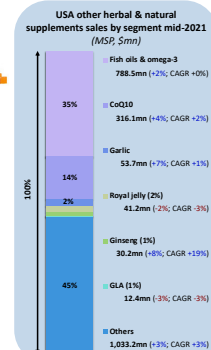
USA | Other herbal & natural supplements

- Vegan launches were a notable trend including **Wiley's CatchFree Omega** (Wiley's Finest, March 2020) and **Forest Remedies Multi Omega 3.6.9** (Forest Remedies, July 2021), both featuring alihflower oil as an alternative to fish and flax oils, while **Vegums Algan Omega-3** (Vegums, January 2022) feature DHA derived from algae oil

Co-enzyme Q10

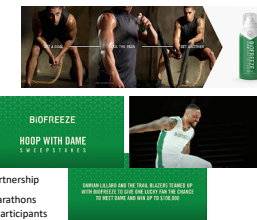
- Category is dominated by numerous CoQ10 supplements from longline players, with most posting only moderate growth and with little differentiation; most are positioned to support heart health and energy production, plus replenishing CoQ10 levels during treatment with statins

USA leading CoQ10 supplements mid-2021 (MSP, \$mm)			
Rank	Brand	\$mm	mid-21 / mid-20 % share
1	Qunol (Quten Research Institute)	75.0	+20%
2	Nature Made CoQ10 (Pharmavite / Otsuka)	72.3	+3%
3	Nature's Bounty CoQ10 (Nestlé)	43.3	+1%
4	Natrol CoQ10 (Natrol)	22.9	+1%
5	Sundown CoQ10 (Nestlé)	7.1	-10%
Private labels		34.6	-7%
Others		60.9	+1%



Brand case studies | Biofreeze (Reckitt)

- Advertising strategy focuses strongly on sports marketing, encompassing online and traditional media leveraging "No.1 clinically recommended claim" to strengthen brand's reputation for efficacy
- 2021 A+P included a competition in association with basketball team the Portland Trail Blazers, offering an opportunity to meet professional player Damian Lillard and win cash prizes
- Other celebrity endorsements include Angela Manuel Davis and Sloane Stevens
- In 2022 brand became "Official External Pain Relief Partner" of the Rock 'n' Roll Running Series under a multi-year partnership
- Promotional activities include "Biofreeze Pain Relief Zones" at marathons and half-marathons, where a "Cooling Crew" offer the brand to participants
- Outside USA presence is more limited, with UK next largest market (\$1.7mm, -4%); brand was extended there in November 2019 with **On-the-Go Singles** single-dose sachets of gel
- Promotion in the UK includes a brand Facebook page with customer testimonials and inspiration and advice for sports and exercise enthusiasts (see below)
- Other markets include France (\$1.4mm, +1%) and Canada (\$0.7mm, +22%)
- Brand also launched in Australia in 2017, extended with a 110g SKU of the gel format in 2019

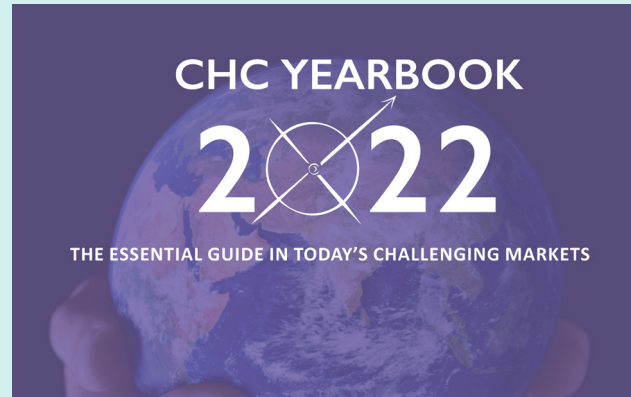


Biofreeze
Biofreeze
Biofreeze provides relief for sore muscles, joints, sprains, strains, and more. It's the only topical pain relief that's clinically proven to work. Biofreeze is available in a variety of formats for all your pain relief needs. And since you can use it on the spot and start working towards your next goal.

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