



Brand	Nature's Bay DHA
Marketer	Dr Natural
Owner	By-Health
Major Category	Vitamins, Minerals & Supplements
Subcategory	Fish oils & omega-3
Region	Asia-Pacific
Country	China
Activity	Line extension
Activity Date	October 2022

Details Dr Natural (By-Health) has partnered with China Aerospace Science & Technology Corporation (CASC) to hold a "Dream Future, Stars and Seas" co-operation conference and to launch the first DHA algal oil gift box for children as part of its Nature's Bay range. Within the box are three bottles of 30 liquid capsules containing DHA algal oil, claimed by By-Health to be Gold Standard certified, and positioned to contribute to heart health and overall wellbeing. ARP: RMB428 (\$61.57)

Status Supplement

Pack Size 3 x 30

Format Capsules - liquid

Dose 1-2 capsules per day (for adults take directly, for children cut the end of the capsule and squeeze filling into the mouth)

Ingredients DHA algal oil (Gold Standard certified)

Innovation Ranking ★★★

Note also 3 stars awarded for its highly innovative packaging and high-quality formulation. By-Health also deserves credit for an imaginative tie-up with China's CASC space programme. The product was launched in the run-up to China's 11.11 shopping festival and has been a bestseller on Tmall, according to reports

Health of the planet now a top consumer priority

- Research shows consumer priorities are shifting, with the health of the planet now a leading concern. That said, consumers remain sceptical of broad sustainability claims that overpromise. Marketers are responding to this growing trend by relaunching their products or extending their ranges with eco-friendly versions
- Ways in which CHC marketers are addressing this trend include reducing the amount of packaging in their products (*see Salonpas in Japan on next slide*), launching or relaunching their products in recyclable packs or extending their ranges with natural-based formats (*see Urgo Bambou launch in France*)
- As covered in the gastrointestinals section of our Innovation Showcase, antacid Mylanta One EcoCare (Infirst / J&J) was a summer 2022 US line extension, available in an aluminium recyclable bottle to cut down on plastic waste
- Chattem (Sanofi) also relaunched OTC allergy remedy Nasacort Allergy 24HR in USA in late 2022, making it available in new recyclable carton packaging, which it claims will work towards “eliminating 96,000 pounds of packaging”
- In Canada, Vibe Mushrooms launched a new range of five mushroom-based supplements in mid-2022, including Cordyceps (to improve endurance) and Master Blend (for immune support), all available in recyclable pouch packaging
- In Australia, Sanofi’s latest 2022 A+P campaign for VMS range Nature’s Own promotes its partnership with Greening Australia, an environmental enterprise that aims to restore native vegetation to urban spaces. The “For Nature, For You” multimedia initiative targets eco-friendly consumers concerned about what brands are doing for the planet and promotes the company’s commitment to sustainable practices in the making of the VMS line’s products and packaging



PEA-based supplements at the cutting-edge of pain relief

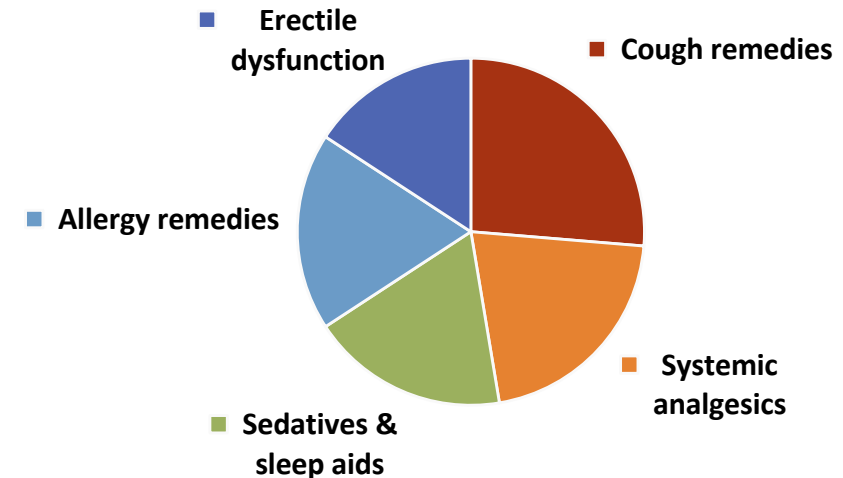
- PEA (palmitoylethanolamide) is a fatty acid amide that has long been a component of food and is now increasingly being found in supplements
- Patented ingredients Levagen and Levagen+ (Gencor) both contain PEA, while Perrigo was the first to market um-PEA, an ultra-micronised version of PEA, in H1 2022 with the roll-out of Nervixen in Germany and Switzerland, sold as tablets positioned for neuropathic and lower back pain and claimed to be more easily absorbed by the body than standard forms of PEA
- Pain relief is also the primary positioning for supplements containing PEA or Levagen / Levagen+, notably Metagenics' summer 2022 launch of Bio Absorb PEA Advanced in Australia, a unique combination of Levagen+, vitamin B1 and patented saffron extract Afferon in vegetarian capsules
- In USA, CV Sciences extended its PlusCBD range in March 2022 with PlusCBD Relief, softgels formulated with PEA, CBDA and Levagen+ PEA. CV Sciences markets PEA as a CBD-like compound shown by clinical studies to be an alternative to ibuprofen, positioned to relieve pain and soreness
- A notable UK launch containing Levagen+ was Optimum Nutrition Gold Standard Daily Support, capsules positioned for joint & muscle health with a specific claim to support formation and maintenance of connective tissue
- Finally, one PEA supplement with a different positioning was DonnaPlus+ Sauzcare (Ordesa) in Spain, for relief of premenstrual syndrome symptoms



CCA again the key NPD driver, led by cough and allergy

- Cough, Cold & Allergy and Lifestyle CHC were the two main drivers of CHC innovation in Poland, but overall NPD activity was again lower vs 2021
- Cough remedies was the most active subcategory, with USP Zdrowie's new Honikan range, Teva's new Flegamina Fast line and Levosol Syrop (Solinea)
- Rx-to-OTC switch activity was steady in 2022, with erectile dysfunction the main driver, including the world-first switch of tadalafil 10mg, leading to the launch of Tadalafil MaxOn (Adamed) and Tadalafil Maxigra 36h (Polpharma). Queisser also launched Doppelherz DoppelSil Max (sildenafil 50mg)
- Other key OTC launches in 2022 post-switch included Biofarm's sleep aid Noctis Noc (doxylamine hydrogen succinate 12.5mg), Adamed's allergy remedy Bilastyna Hitaxa (bilastine 20mg) and Aflofarm's systemic analgesic Dezamigran (almotriptan 12.5mg), the latter the first OTC triptan in Poland
- Notable Analgesics innovations included Rapidentin (Aflofarm) for mouth & dental pain and Sun Pharma's Pyretolek (metamizole 500mg), while in GIs USP Zdrowie launched antacid Manti Extra, Aflofarm unveiled Hepaslimin Z Witamina D3 and Uργο launched heartburn remedy Esomeprazol Alugastrin
- As for CCA, two other bilastine-based allergy remedies were launched in 2022 – Menarini's Clatra Allergy and Polpharma's Allertec Effect – while intimate care treatment Iladiamed (Aflofarm) was a key Derma launch
- Turning to VMS, the most notable launch was Servier's multivitamin Biovital Complex Ona, positioned to support wellbeing and thyroid health in women

Poland: Top 5 CHC subcategories by NPD activity in 2022



- Our *CHC New Products Tracker* service has recorded a stable number of new products being launched over the past 4-5 years, however **the number of 3 and 4 star entries dropped** significantly in 2021 (104) and 2022 (116) vs 2019 (176) and 2020 (180)
- NPD activity trends have also changed markedly in recent years, as we emerge out of Covid’s shadow, with subcategories like **sedatives & sleep aids, aesthetic treatments, hair & beauty supplements and eye care all coming to the fore in 2022**
- Likewise, subcategories which benefited from a Covid-powered boost in NPD activity, such as herbal & natural immune stimulants and antiseptics & disinfectants, saw that effect wane significantly during 2022. Separately, cannabis / CBD activity also dropped off further, while **another trend of note is the rise in topical analgesics and H&N joint health activity in 2022**

GLOBAL: TOP 10 CHC SUBCATEGORIES BY VOLUME OF NPD ACTIVITY, 2020-22

2020: YEAR THE PANDEMIC HIT



2021: EMERGING OUT OF THE PANDEMIC



2022: POST-COVID LANDSCAPE

