

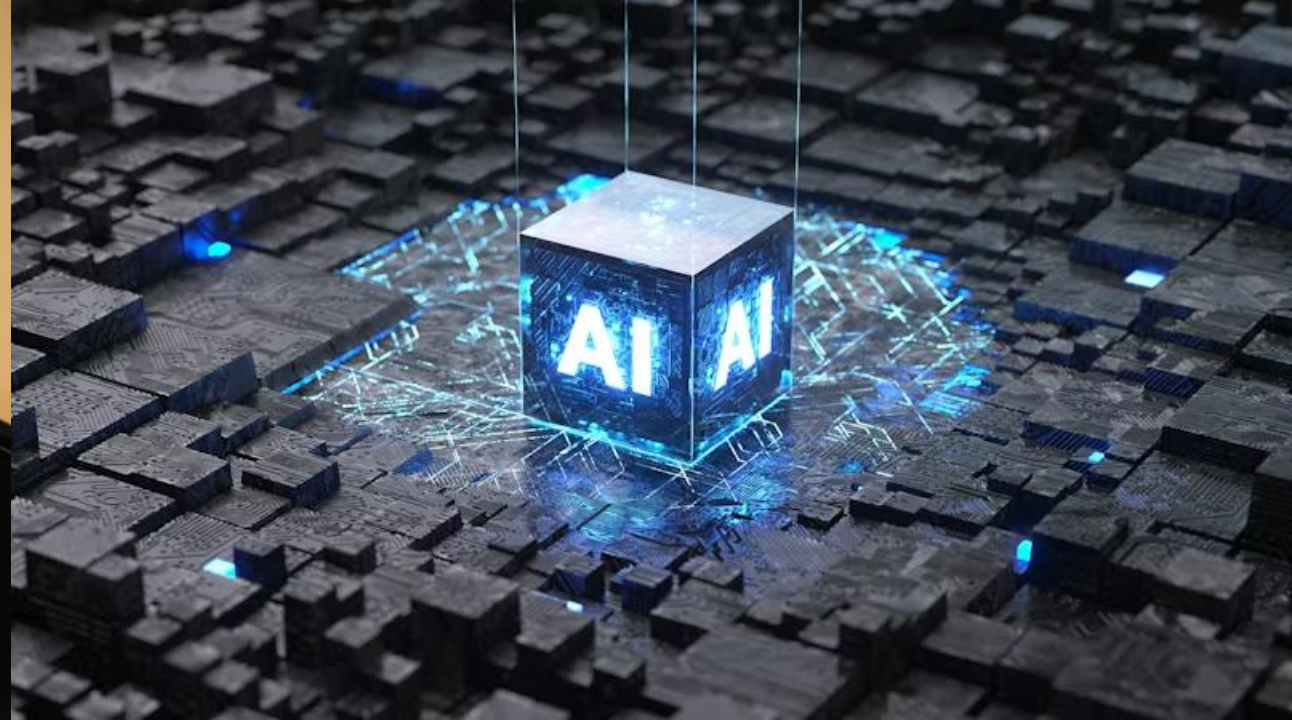
Turning Signals into Success

Case Studies of Innovation in Consumer Health





**UNPRECEDENT
SPEED OF
CHANGE**



The BIG shifts on consumer behaviours

**From “HEALTH” to
WELLNESS obsession**

**TRUST became the most
valuable brand asset**

**Perception of VALUE has
created a NEW PARADOX**

**AI is reshaping human
expectations VERY
RAPIDLY**

**MAINSTREAM is
fragmenting → the rise
of MICROCULTURES**

**The EXHAUSTION
ECONOMY**

CASE STUDIES

1

Consumer Centric Innovation:
O POSITIV

2

Category Reinvention &
Premiumization
LIQUID I.V.

3

Partnership Led Innovation:
NOURISHED



THE SIGNAL: NEXT FRONTIER IN WOMEN'S HEALTH

The most underserved space in Consumer Healthcare

90%

Primary Healthcare decision makers for their family and key influencers for friends

Household **healthcare spending** is done by women.
Working-age females spend 29% higher per capita on healthcare compared to males in the same age group

80%

75%

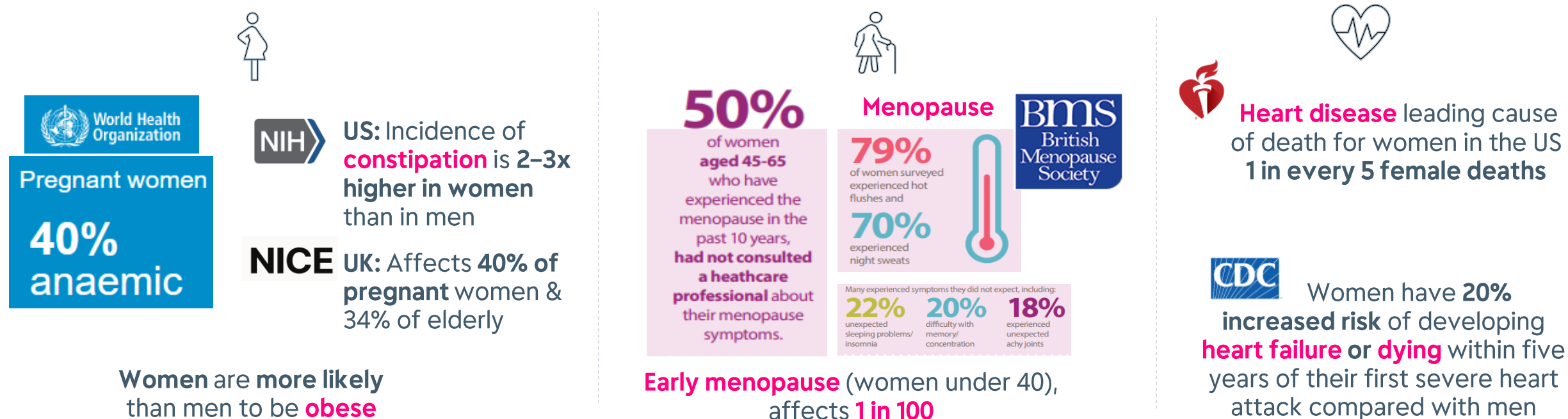
More likely to use **digital tools for healthcare** than men

LIVE longer, SPEND more and SEE HCPs more often than man

Consumer awareness, demographics and lifestyle choices are foundational pillars that will continue to boost category growth



Demand is high & women's health concerns often overlooked or viewed through a male lens



Governments & regulators beginning to take notice...

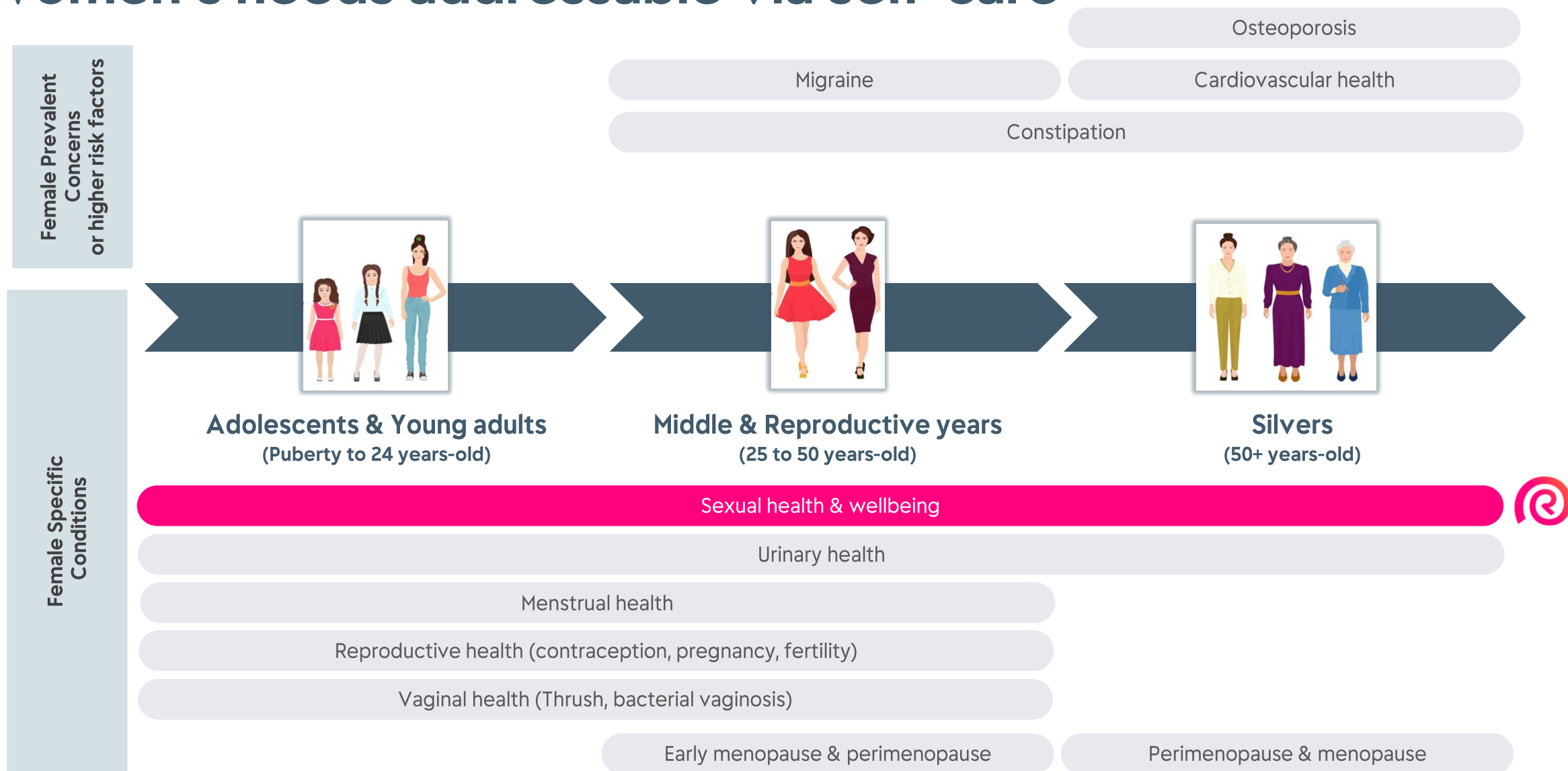


Spain approves **paid medical leave for period pain**
State social security (not employers) will pay for women to have time off for severe period pain.



Increasing patient access to HRT
From April 2023 NHS prescription pre-payment certificate (PPC) available, that allows women to **access a year's worth of HRT** treatments for **less than £20**.

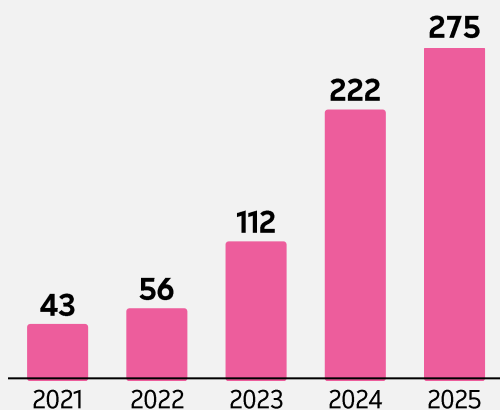
Women's needs addressable via self-care



Note: Excludes Rx focused categories such as female cancers, endometriosis, vaccinations

Growth through category creation products

5Y CAGR +59%



Source: GCI Desk Research

- Developing **first-to-market Women's Health products** around unmet needs.
- Consumer-Centric creation** combined with evidence-based proprietary formulation.
- GTM Strategy: "*fail fast and fail cheap*" – **high levels of innovation** to see what resonates with consumers and discontinuing fast on what doesn't gain traction.
- Brand Awareness & Reputation driven by leading **Social Engagement**, conversations & reviews.
- Scaling **Omnichannel engine**.
- Bold Campaigns: positioned as **authentic, taboo-breaking voice educating and empowering** to support women at every stage of her life.



Founded



Founded by siblings Bobby and Brianna Bitton

Unsuccessful Launch Attempts



Entry into new segments like Probiotics, Metabolism and Immunity

Portfolio Expansion



Stretch focused on addressing Women's Health needs across all key life stages

amazon

Expanded nationwide footprint through major retailers



Entry into Intimate Wellness space



Launch of Intimate Deodorant and Probiotic washes

2018

2021

2022 - 2023

2024

2025 - 2026

COMPREHENSIVE PRODUCT PLATFORM

Under the O Positiv Brand, Four Targeted Product Lines Uniquely Address Women's Health Needs Across All Key Life Stages





THE SIGNAL: FUNCTIONAL HYDRATION





#1 Powered Hydration brand in USA and largest brand in Unilever Health & Wellbeing portfolio



Founded in 2012



California, USA



\$15.5M (7 rounds)



Acquired the company in 2020 for approximately \$500M



Present in 15 countries globally (US, EU and DVM)



€1.9bn

(4x since acquisition)

KEY SUCCESS FACTORS



Comprehensive & Innovative Product Range



40+ flavors
\$1.7 price/stick

Range with functional health benefits: Probiotic, Immune Support, Sleep, Energy, etc.



Kids range



Sugar-Free range



Compelling consumer story-telling powered by Unilever GTM scale

3X THE ELECTROLYTES
of the leading sports drink

FASTER HYDRATION
than water alone

HYDRATION FOR
performance, travel, heat & sun, and wellness

8 VITAMINS
& NUTRIENTS

Brand's success story driven by its positioning at the forefront of the shift from illness recovery towards EVERYDAY WELLNESS.



Continuous market expansion footprint also plays a critical role in brand's success strategy



Leverage Digital/ATL (Influencer Mkt, Community Engagement)



534K



212K



204K

Lifestyle positioning is reinforced through collaborations with influencers and celebrities, with curated flavour bundles developed alongside creators spanning sports, fashion and social media.



CS3

THE SIGNAL: INTENTIONAL HEALTH

Consumers increasingly expecting for solutions tailored to their specific needs



NOURISHED



"More than 53 million units sold"

Why Choose Nourished?



Truly Personalised

Combine 7 nutrients with your flavour choice for your unique stack



7-in-1 Gummy

That your body digests like food for higher absorption and efficacy



Freshly Made

Made to order in the UK with ethically sourced, traceable ingredients



Plant Based

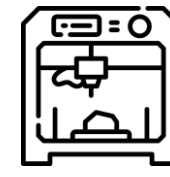
Sugar-free and Vegan Society approved along with GMO free



Cutting-edge Research



Premium Ingredients



3D Printing Technology



Science Stacked Wellness

History

- Founded in 2019 by nutritionist Melissa Snover, Nourished has reimagined how people take vitamins with the **world's first truly personalised nutrient gummy, created using patented 3D printing technology.**
- In 2023, bespoke partnerships with **Colgate** (Oral Health) and **J&J/Neutrogena** (Skinstacks) helped further boost company awareness.
- GeoX: Signed a very successful partnership with **UPSA**, with the aim to expand presence in Europe (initial scope France and Italy) with a more recent expansion to another four European countries: Spain, Belgium, Switzerland and Greece.
- In recent years, extensively improved distribution in **Retail Channel: Boots, Holland & Berrett, etc.**
- Recently named as Femtech Company of the Year by the prestigious Health Tech World Awards.



FROM £28

High Flyer Stack

Energy & immunity support



FROM £28

Inner Defence Stack

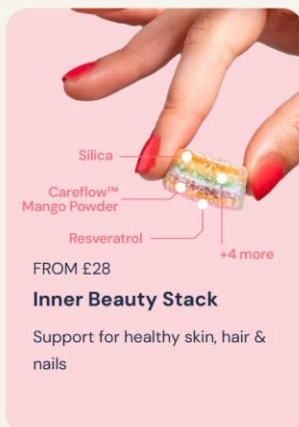
Support your immune system



FROM £39.99

Collagen+ Joints

Joints & recovery support



FROM £28

Inner Beauty Stack

Support for healthy skin, hair & nails



FROM £28

Party Proofed Stack

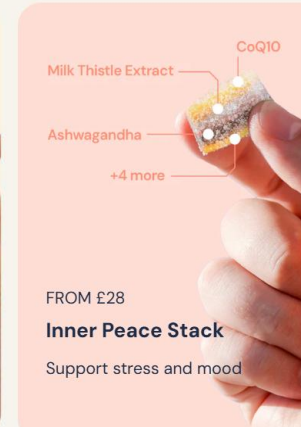
Support your partying spirit



FROM £28

Essentials Stack

Thrive daily, an essential blend



FROM £28

Inner Peace Stack

Support stress and mood



FROM £39.99

Collagen+ HSN

Hair, skin & nails support

Partnership with UPSA for expansion in Europe



Bespoke Partnerships leveraging equity of BIG players



Colgate x **NOURISHED**

A New, **Limited Edition Range** for
Better Oral & Body Health



Nutristacks are chews that are optimized to **support oral health and deliver the personalized care people need** with purposeful ingredients. These **oral health prebiotics** are available in several varieties, including Colgate Energy with ginseng, Colgate **Focus** with CoQ10 and Colgate Glow with added Vitamin E.

Neutrogena



Johnson & Johnson



Skinstacks gummies are formulated in partnership with Nourished, **combining its 3D printing with Neutrogena's digital skin assessment** (Skin360 mobile app), which uses over 100,000 skin pixels to analyse over 2,000 skin concerns and facial attributes.



Nourished expands into four new major European markets

September 2024



Innovative 3D Printed Gummy Brand Nourished Launches in Boots With Expanded Range of Nutritional Gummies

March 2025



Exclusive Nourished product range launches in Holland & Barrett stores nationwide

August 2025



EARLY SIGNALS

**The next era of growth will belong to
organisations that understand humans
more deeply**

Grazie Mille!



Leandro Gaspar
Global Competitive Insights Director