



The State of Homeopathy

mass market 🌿 e-commerce 🌿 natural



HOME
IS FOR HOMEOPATHY

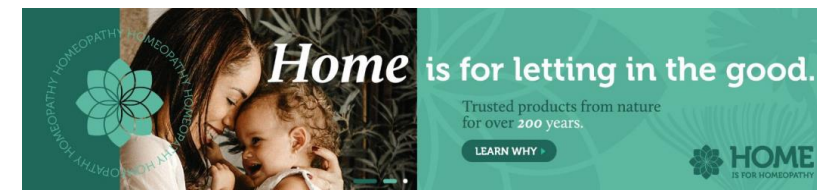

The Emerson Group
A Consumer Products Equity Organization

AMERICAN
ASSOCIATION of
**HOMEOPATHIC
PHARMACISTS**

Promoting Integrity • Quality • Trust Since 1923

Awareness is Growing...

SHOPPER "BUYING" NATURAL, SAFE, AND EFFECTIVE



- 91% of purchasers are aware of the term *homeopathic* by word of mouth... but they don't know what it is or how it works!



Natural, Safe, Effective



- of those buying the brand only 15% know it's homeopathic!

- 20% of those buying OTC cold remedies buy BOTH homeopathic & allopathic
 - while only 9.2% buy homeopathic only



- 15% of all women believe they have purchased a homeopathic treatment in the last 24 months...37% DID!



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A Consumer Products Equity Organization *WSL Survey 3,092 Respondents. *National Consumer Panel IR Total US All Outlets

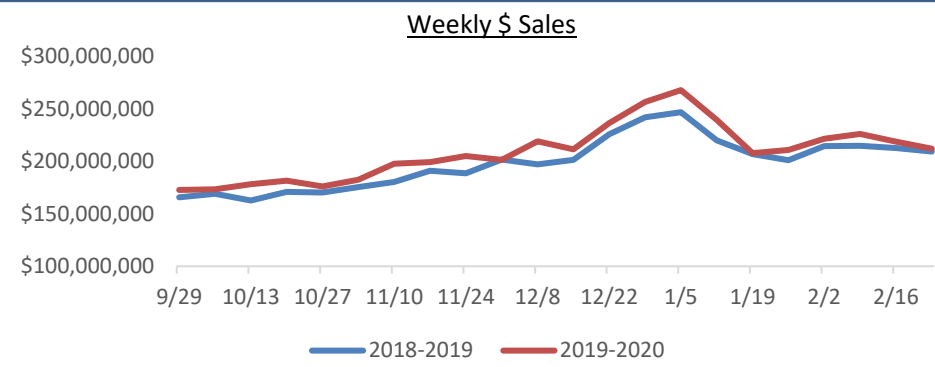


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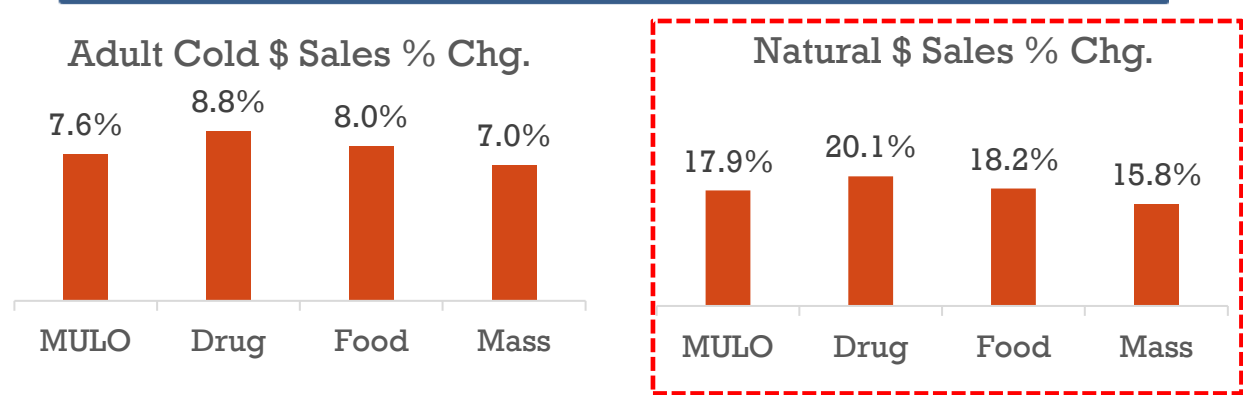
Both Adult and Kids' Homeopathic Sales

OUTPACE ALLOPATHIC SALES PRE-COVID RESULTING IN HOMEOPATHY SHARE INCREASE

1. Season is trending ahead of last season through Feb 23, 2020



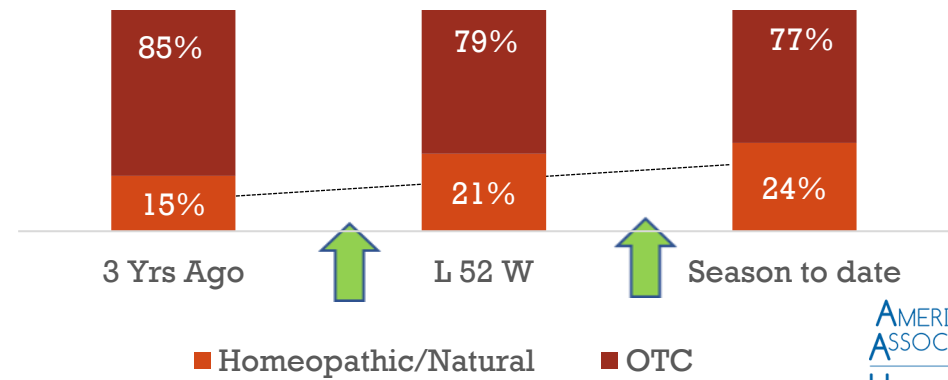
2. Natural Adult Cold is out-performing the category in every COT season to date



4. Season to date Natural Kids is out-performing Kids UR growing Natural's Share of Kids UR to 32.3%

	Season to date Kids UR \$ Sales Chg.	Season to date Nat Kids UR \$ Chg.	Nat Share of Kids UR Season	Nat Share of Kids UR Season YAG
MULO	3.0%	7.7%	32.3%	30.8%
Drug	3.3%	8.9%	31.7%	30.0%
Food	2.6%	3.3%	26.6%	26.4%
Mass	1.8%	4.5%	34.9%	34%

3. ...Growing Natural Share of Adult Cold to 24% Season to Date

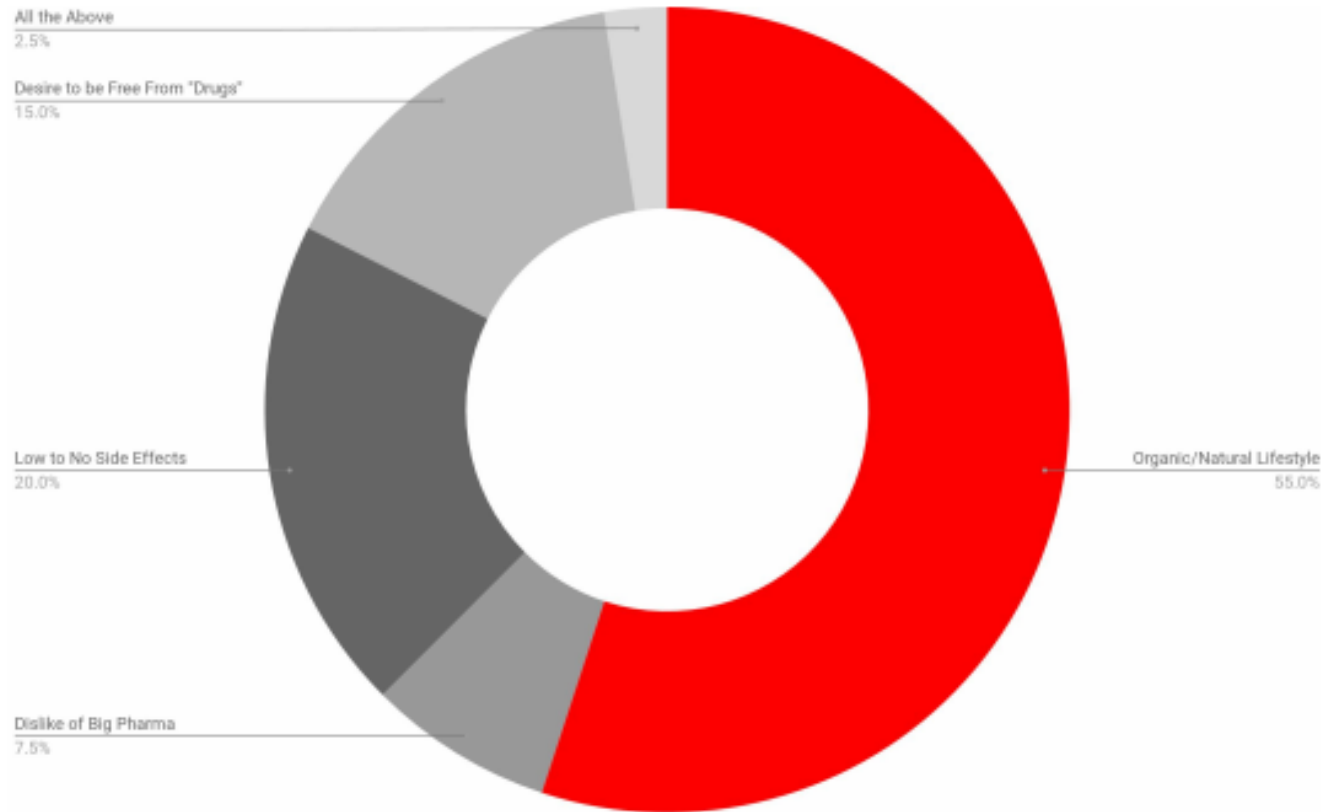


Homeopathy = Wellness

+ State of Homeopathy



+ Homeopathy Aligns With The Ever Growing "Wellness" Lifestyle



52%
Of surveyed
consumers believe
homeopathy
aligns with their
wellness lifestyle



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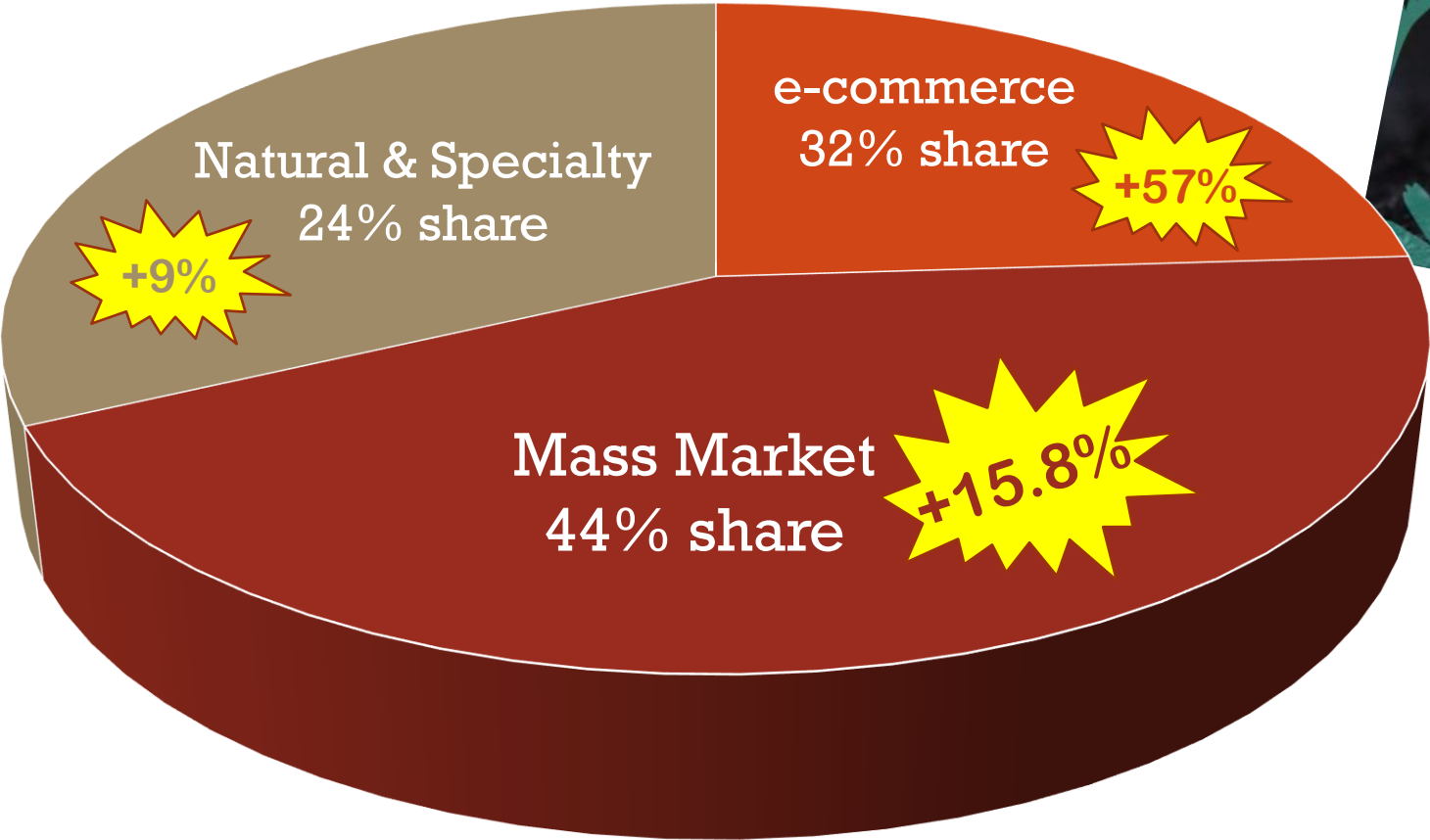
Prepared by: Cullen+Rose | Confidential + Proprietary



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Homeopathic Sales by Channel, 2020

\$1.36B +24% GROWTH



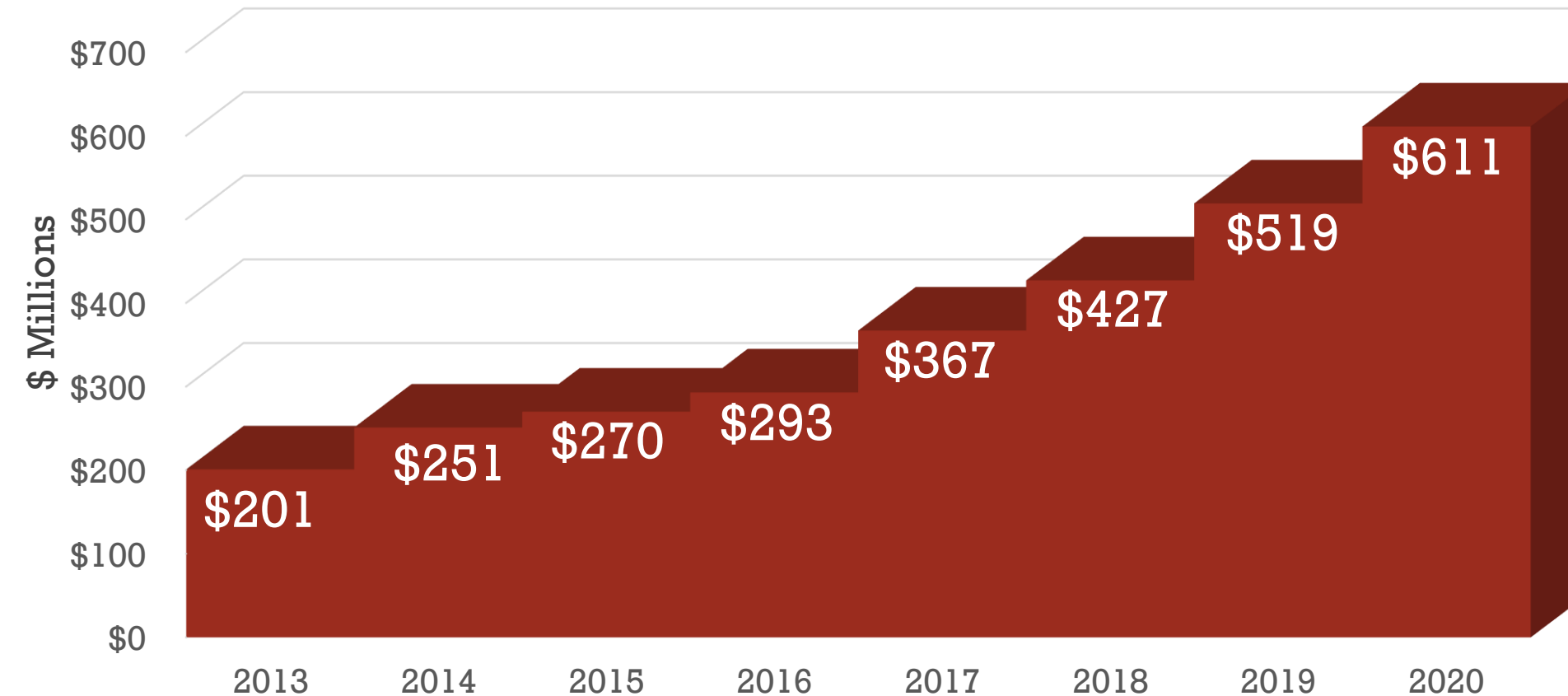
Repeat Purchases: Homeopathic = 51%, Allopathic = 32%





Branded Homeopathic

19.6% CAGR MASS MARKET GROWTH



- **Health Care**
CAGR = 3.7%...

- **2.6% of Total**
OTC

nothing but
potential!



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Marketplace NOTABLES



+57%



+25%



+24%



+8%



"Better For You" Campaign

9/20/20, 9/27/20 AND 10/4/20



September 20-26, 2020

ALTERNATIVE
Sambucol
BLACK ELDERBERRY
COLD & FLU RELIEF

with and
Sambucol Elderberry
1400mg, 100mg, 100mg, 100mg

\$11.99

ALTERNATIVE REMEDIES MEET TRADITIONAL MEDICINE

BUY 1 GET 1 50% OFF
Coricidin HBP
with and
Alka-Seltzer Plus, Alka-Seltzer or
Claritin Allergy Relief
100mg/10mg/10mg (PMS)
100mg/10mg/10mg (PMS)

\$12 OFF
On Coricidin HBP
or Alka-Seltzer Plus

BUY 1 GET 1 50% OFF
with and
Tide and Gain
60-100 oz., 32-62 oz.,
or 1.6 gal. or 1.6 gal. or 1.6 gal.
Doritos 100 oz. or
Bounty 240 oz.
or Seventh Generation
Laundry Detergent
100 oz. or Baby Wipes
231 oz.

\$11.94

BUY 1 GET 1 50% OFF
with and
L'Oréal Paris Makeup
with and
Exfoliant and
Aquaphor Skin Care, Baby Food
(All in Baby Care, Baby Food
(All in Baby Care, Baby Food)

\$11.94

BUY 1 GET 1 50% OFF
with and
Wonderful Wipes
Natural Wipes, 144
or Cashmere Wipes, 144
or Baby Wipes, 144
or Baby Wipes, 144

\$8.99

BUY 1 GET 1 50% OFF
with and
Nature Made
Vitamin and
Supplements

\$11.94



September 27 - October 3, 2020

ALTERNATIVE
Zinc-C
Chestal Honey

BUY 1 GET 1 FREE
with and
Zinc-C
Chestal Honey

\$9.99

ALTERNATIVE REMEDIES MEET TRADITIONAL MEDICINE

BUY 1 GET 1 50% OFF
with and
DayQuil
Sinex

\$9.99

BUY 1 GET 1 50% OFF
with and
Chap Skin or Bath Care
products

\$9.99

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products

\$9.99

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with and
Chap Skin or Bath Care
products

\$9.99

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with and
Chap Skin or Bath Care
products

\$9.99



October 4 - 10, 2020

ALTERNATIVE
Genexa
COLD CRUSH

BUY 1 GET 1 50% OFF
with and
Genexa
COLD CRUSH

\$9.99

ALTERNATIVE REMEDIES MEET TRADITIONAL MEDICINE

BUY 1 GET 1 50% OFF
with and
Robitussin
TheraFlu

\$9.99

BUY 1 GET 1 50% OFF
with and
Chap Skin or Bath Care
products

\$9.99

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