



Gargle Water Market Research

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Introduction

The worldwide market for over-the-counter (OTC) drugs could exceed \$70 billion by 2015, according to a report by Visiongain, a British research company. The U.S. market for OTC drugs was \$17.4 billion in 2011, according to the Consumer Healthcare Products Association (CHPA), an OTC industry trade group. That's a steady, though not radical increase from 1964 when OTC sales were recorded at \$1.9 billion.

OTC medicines

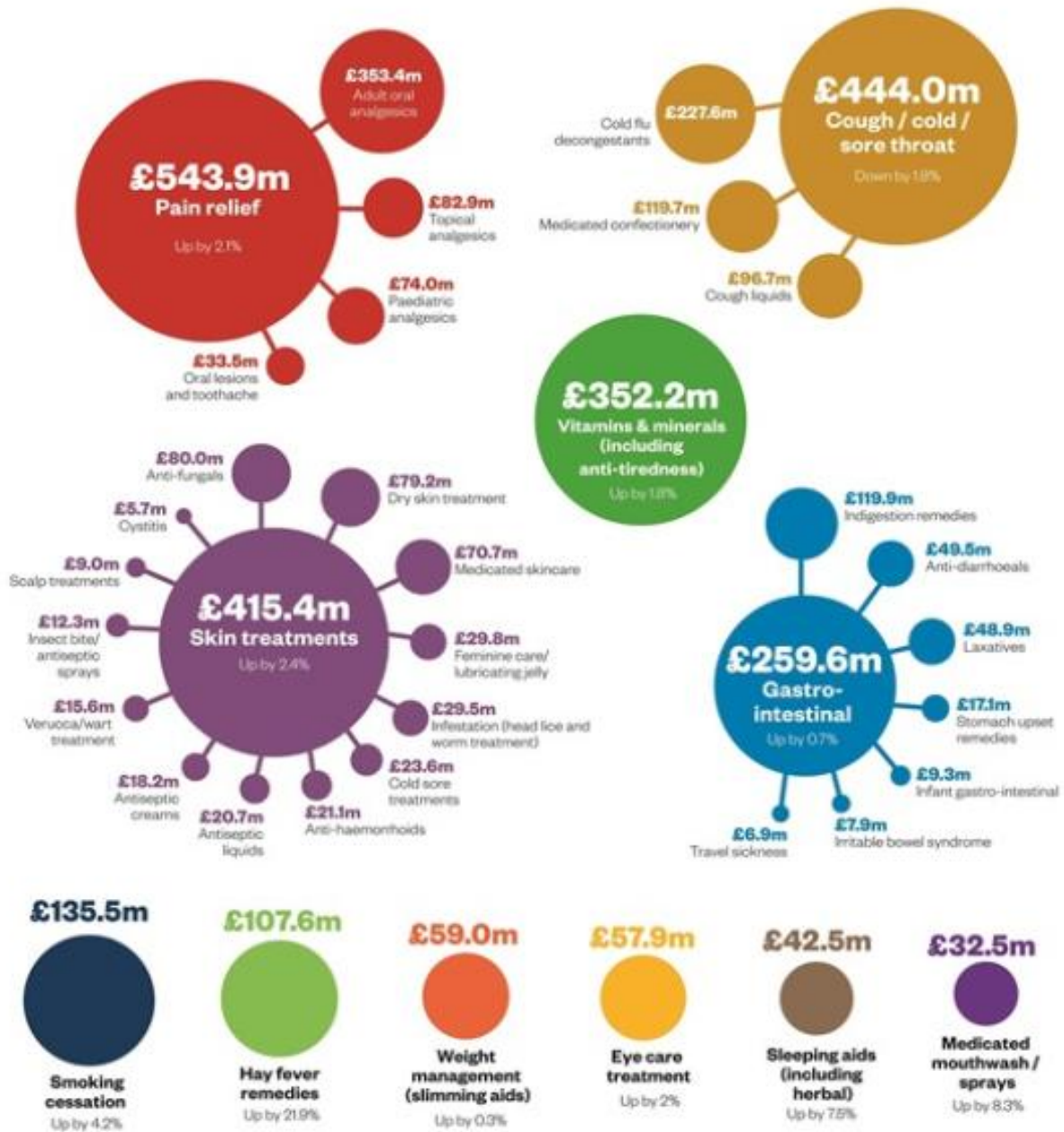
Sales of over-the-counter medicines totalled £2.45bn in 2013, up by £52.3m compared with the previous year.

The over-the-counter (OTC) medicines market continues to grow, with sales totalling £2.45bn in 2013. Short-term influences on the market include the incidence of seasonal conditions such as hay fever, and colds and flu, while long-term drivers include innovation, improved availability and increased incidence of the target ailment.

This infographic shows a breakdown of sales in 2013, and whether sales in each category have increased or decreased compared with 2012. It also highlights the bestselling brands in the hay fever category, which saw the largest growth in sales, and the coughs, colds and sore throat category, which saw the largest fall in sales.

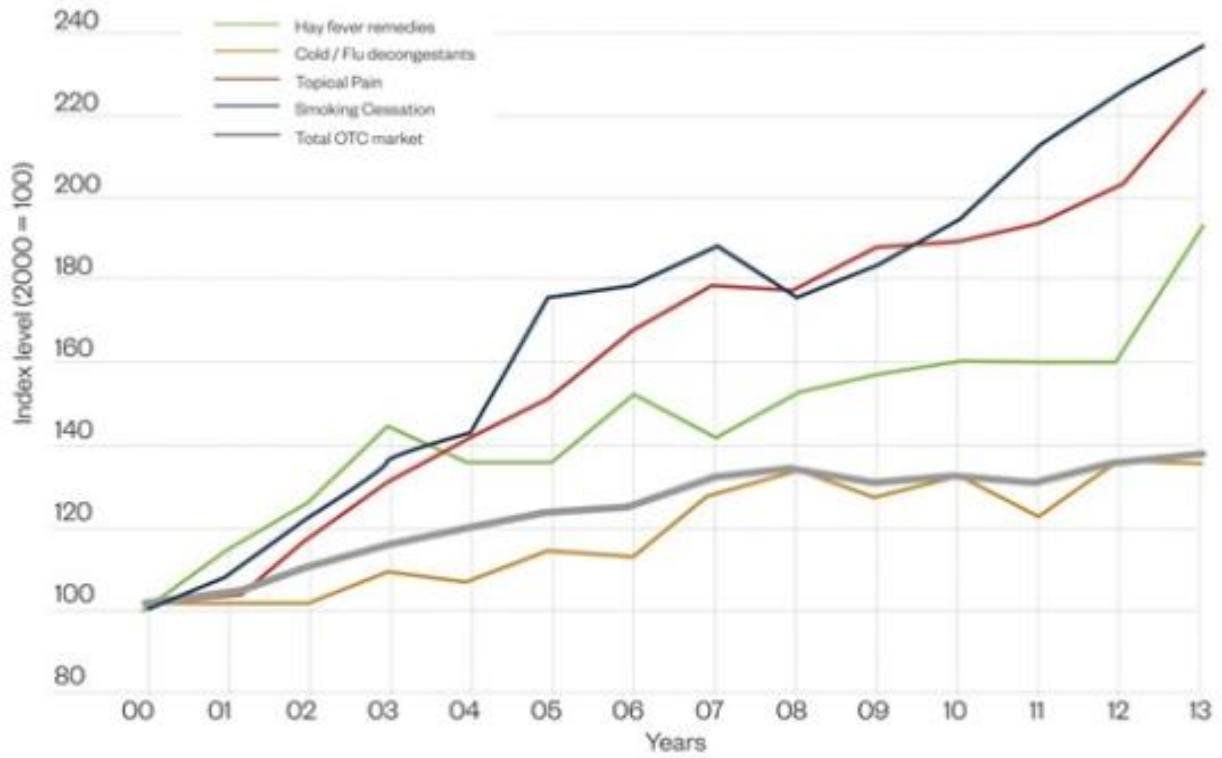


Breakdown of the OTC market



Long-term trends in the OTC market

Long-term drivers of growth include innovation, improved availability and increased incidence of the target ailment, says Martin Wood, head of strategic insight – retail at IRI UK.



Top 10 brands in the OTC market

The bestselling brands in 2013 were dominated by those for pain relief and coughs, colds and flu, with Nurofen accounting for 4.4% of the total OTC market.



The Over-The-Counter Drug Industry

Sales increase as consumers reduce number of doctor visits for minor ailments.

The worldwide market for over-the-counter (OTC) drugs could exceed \$70 billion by 2015, according to a report by Visiongain, a British research company. The U.S. market for OTC drugs was \$17.4 billion in 2011, according to the Consumer Healthcare Products Association (CHPA), an OTC industry trade group. That's a steady, though not radical increase from 1964 when OTC sales were recorded at \$1.9 billion.

More than 700 of the OTC drugs on the market today required a prescription 30 years ago.

The U.S. Food and Drug Administration has been considering making more commonly used prescription drugs for birth control, headache, asthma, high blood-pressure and diabetes available over-the-counter.

Not only would such a move make it easier to access drugs for common illnesses, it would save the government about \$102 billion a year, according to the CHPA.

The downside of such a move for insured patients is that most insurance companies don't offer non-prescription drug coverage.

The American Medical Association has come out in opposition to making more drugs available over-the-counter. The AMA believes patients would be less likely to adhere to a drug treatment regimen without physician oversight.

Top Selling U.S. OTC Drugs

According to U.S. sales figures from 2011, the latest available:

Sales of cough and cold medicines exceeded \$4. billion.

Painkillers had the second-highest sales volume with \$2.3 billion.

Heartburn medicines sales reached nearly \$1.4 billion.

Laxatives sales were \$875 million.

Oral antiseptics and rinses sales reached \$754 million.

Eyecare, including contact lense solutions reached \$525 million in sales.

Anti-smoking products had sales of \$494 million.

Other major OTC products antidiarrheals, acne remedies, topical analgesics such as anti-itch medications, first aid care and sunscreens.

Global Industry Leaders

Johnson & Johnson's Consumer Products division sells branded OTC products worldwide, including the painkiller Tylenol, Listerine mouthwash, Visine eye drops and Desitin for diaper rash.

Novartis sells the popular OTC painkillers Bufferin and Excedrin; Volterin, an anti-inflammatory; Pirsennid and Benefiber which are fiber supplements; cough and cold products branded as Buckley's, Comtrex, and Sinecod; as well as popular medicines for treating sore throat, respiratory problems and nasal congestion.

Proctor & Gamble Pharmaceuticals' OTC products include the heartburn medicine Prilosec, Pesto-Bismal for upset stomach, Vicks cough and cold medicines, and Metamucil fiber supplement.

Other leading OTC sellers include GlaxoSmithKline, Sanofi, Bayer, Pfizer, Boehringer Ingelheim, Merck & Co., Perrigo and Reckitt Benckiser.

Market Projections

OTC sales have declined most in the countries that have been worst hit by the economic crisis. For example, the Greece government no longer subsidizes the cost of nonprescription drugs and has been unable to purchase even some essential prescription medications. Sales of OTC medications have been stable or on the rise in the United States and Western Europe where patients are more frequently turning to nonprescription drugs for the treatment of minor illnesses while reducing trips to the physician's office.

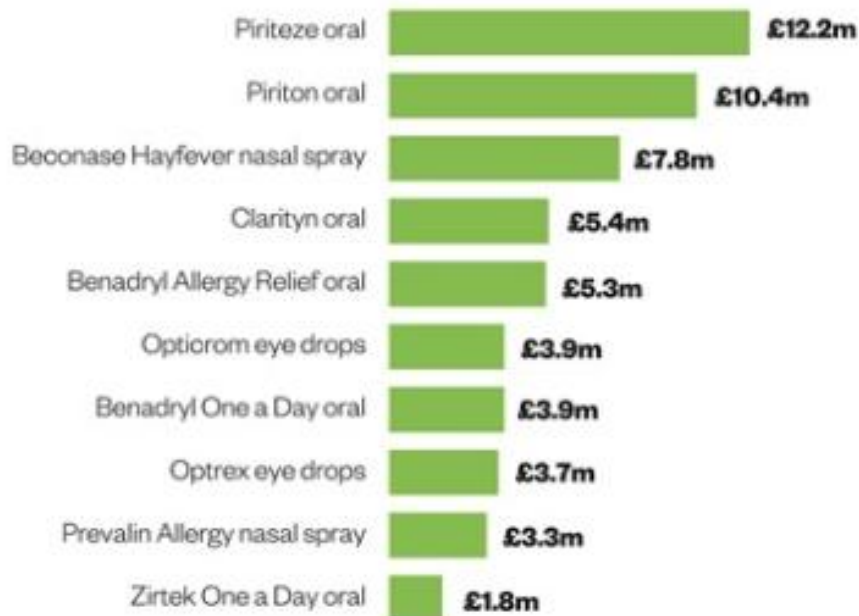
A study commissioned by the CHPA suggests that consumer spending on drugs could be reduced by \$5 billion a year by using OTC meds as a first response to illness. Additional savings can be had by buying generic rather than branded OTCs.

Another CHPA study found that "88 percent of physicians recommend patients try to address minor ailments with self-care interventions, including the use of OTC medicines, before seeking professional care." The study also found that some physicians consider about 10 percent of office visits for minor ailments could be managed by patients through the use of OTC drugs and other self care.

This amounts to over 40 million appointments each year that could be avoided with self-care.

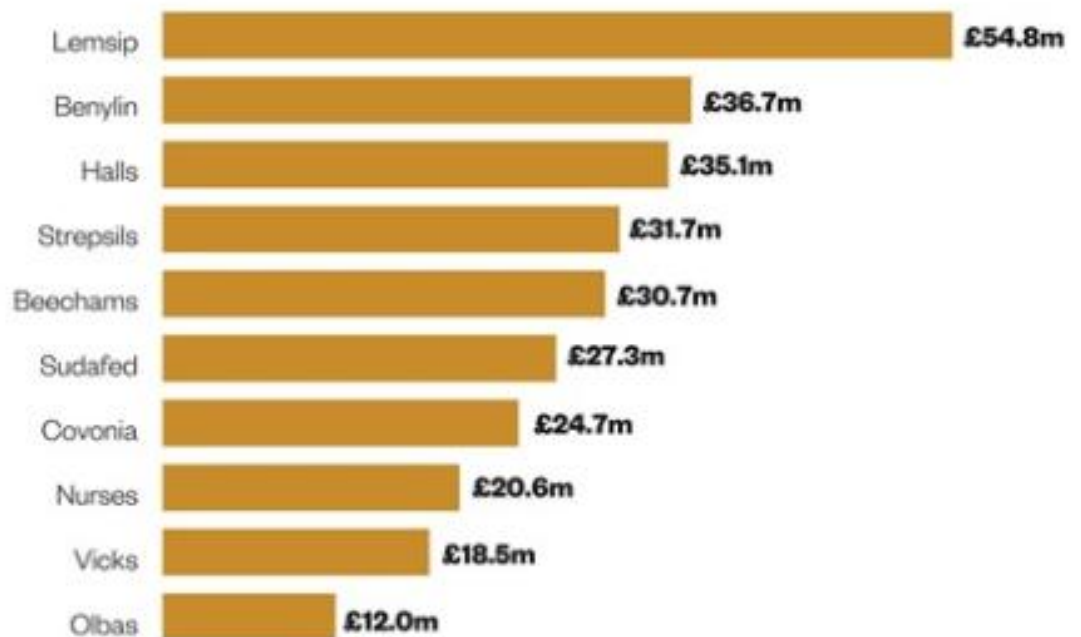
Leading hay fever brands

Sales of oral Piriteze accounted for 11.3% of the hay fever market in 2013, followed by Piriton with 9.7% and Beconase nasal spray with 7.2%.

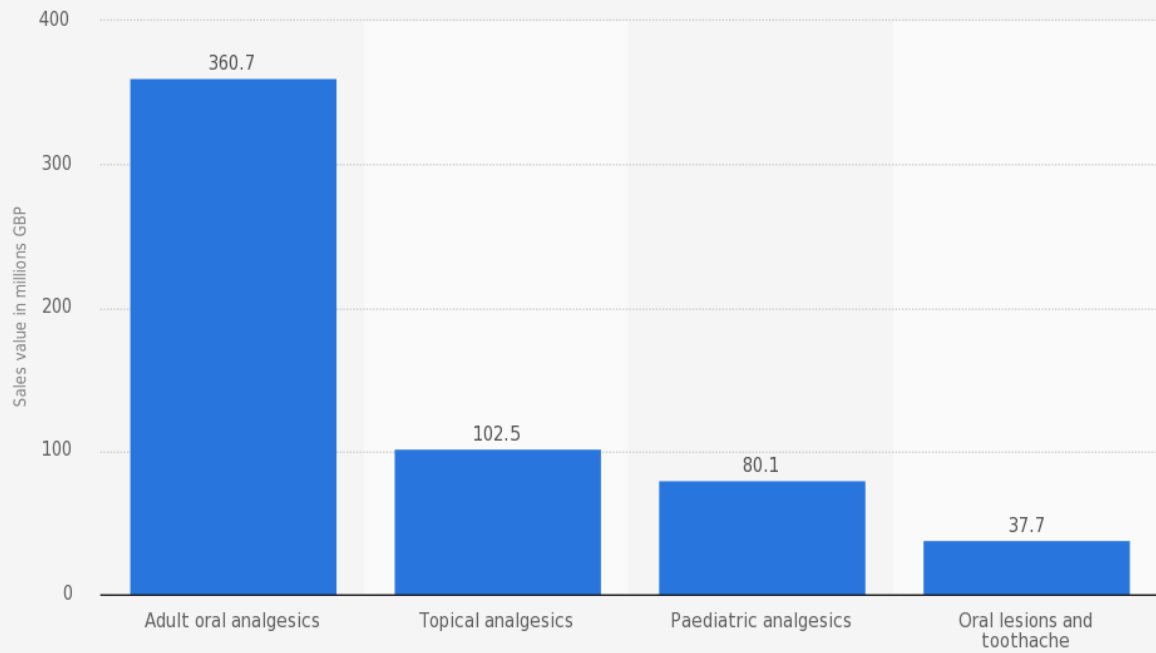


Bestselling winter remedy brands

Lemsip led the winter remedies market in 2013, accounting for 12.3% of sales in this category, followed by Benylin with 8.3% and Halls with 7.9%.



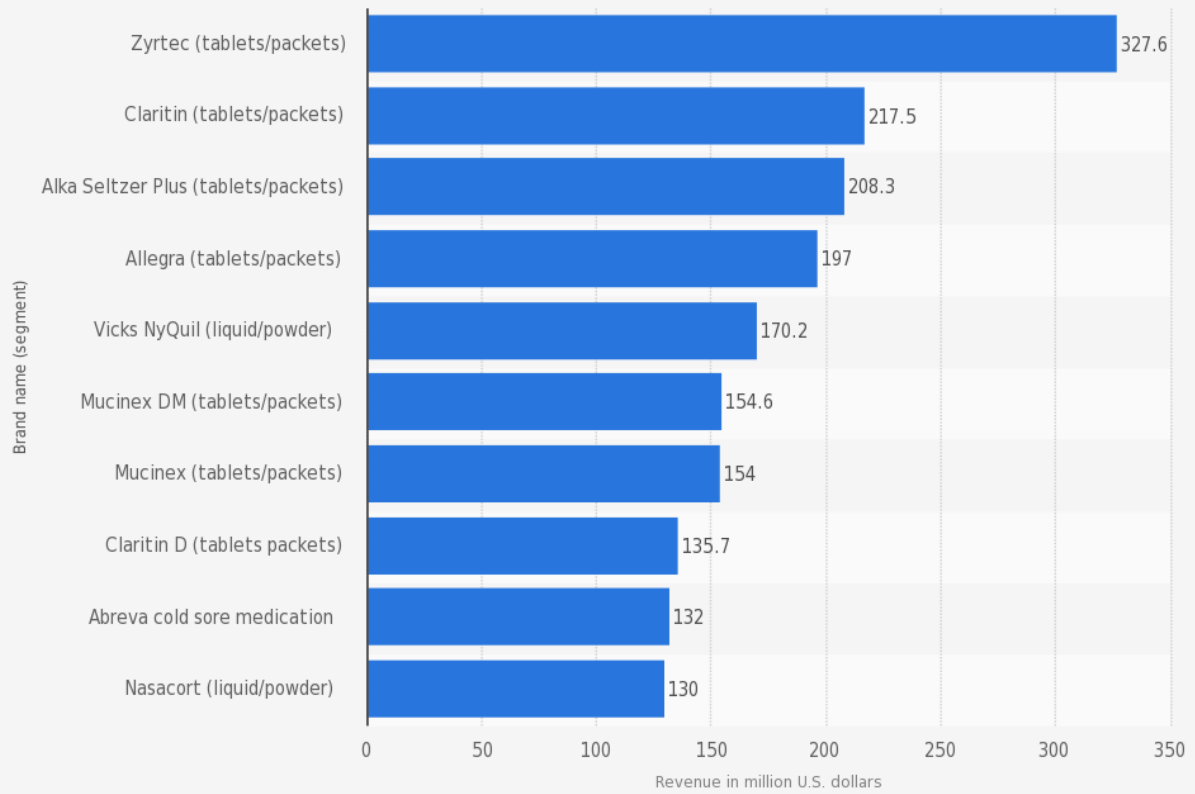
Sales value of over-the-counter (OTC) pain relief medicines in Great Britain in 2014, by category (in millions GBP)



Sources:
IRI; Proprietary Association of Great Britain
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Additional Information:
Great Britain; 52 week period ending December 27, 2014

Top 10 OTC brands for cough, cold, allergy and sinus by revenue in the U.S. in 2014 (in million U.S. dollars)*

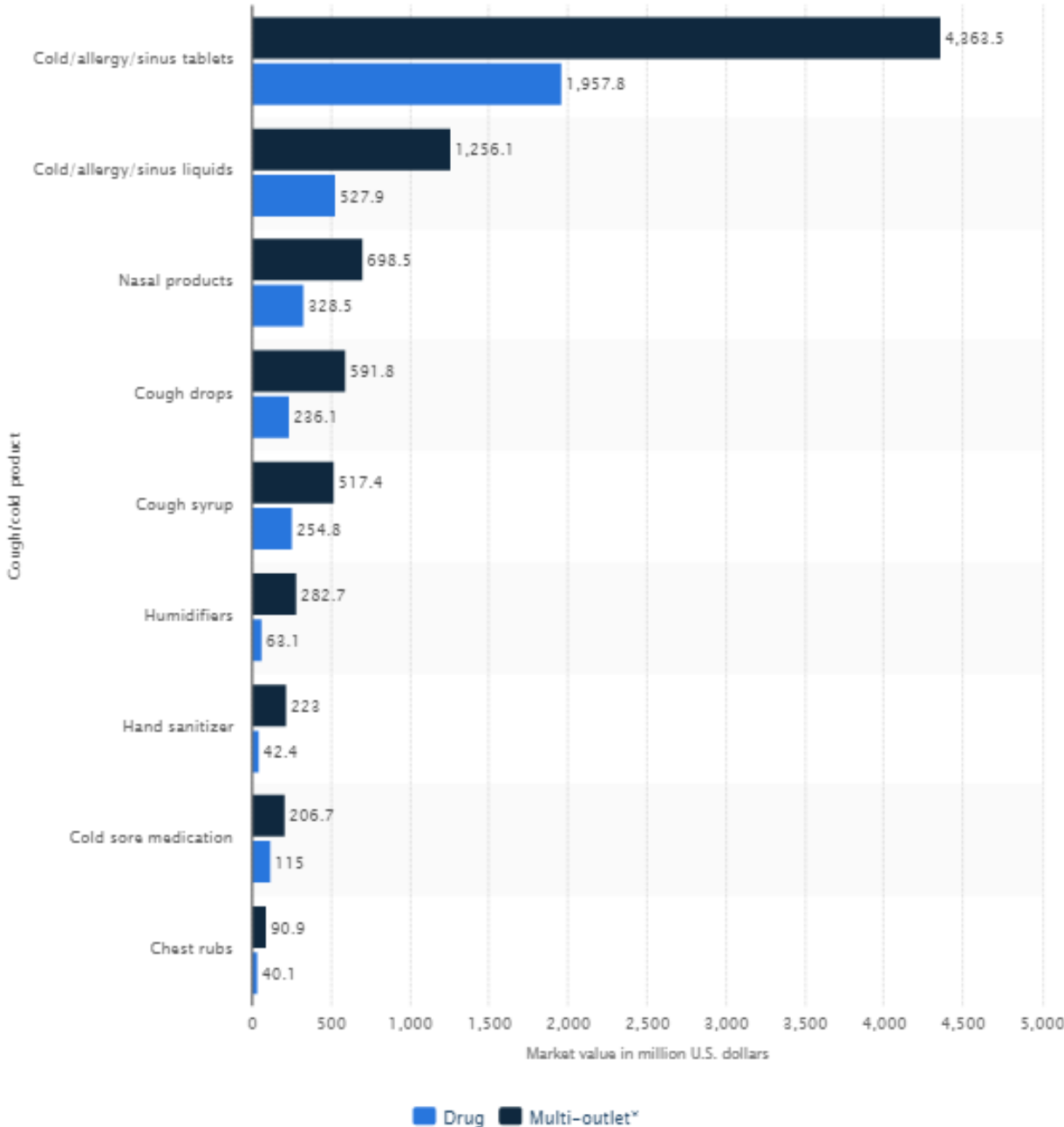


Source:
IRI
© Statista 2015

Additional Information:
United States

Market value of over-the-counter cough/cold and allergy products in the United States in 2014, by outlet type (in million U.S. dollars)

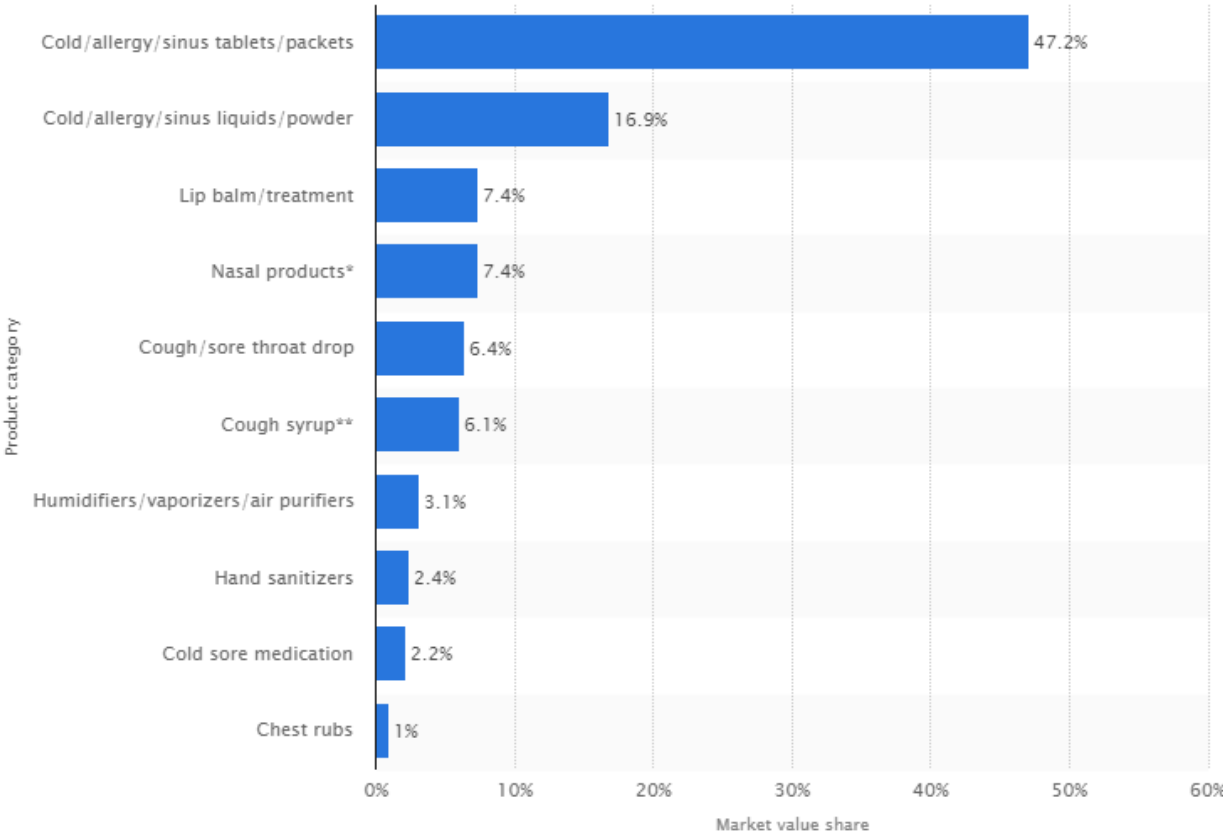
This statistic shows the market value of over-the-counter cough/cold and allergy product sales in the United States in 2014, by outlet type. In that year, nasal products that were sold at multi-outlets in the United States had a market value of about 699 million U.S. dollars.



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Market value share of over-the-counter (OTC) cough/cold and allergy products in the United States in 2015, by product category

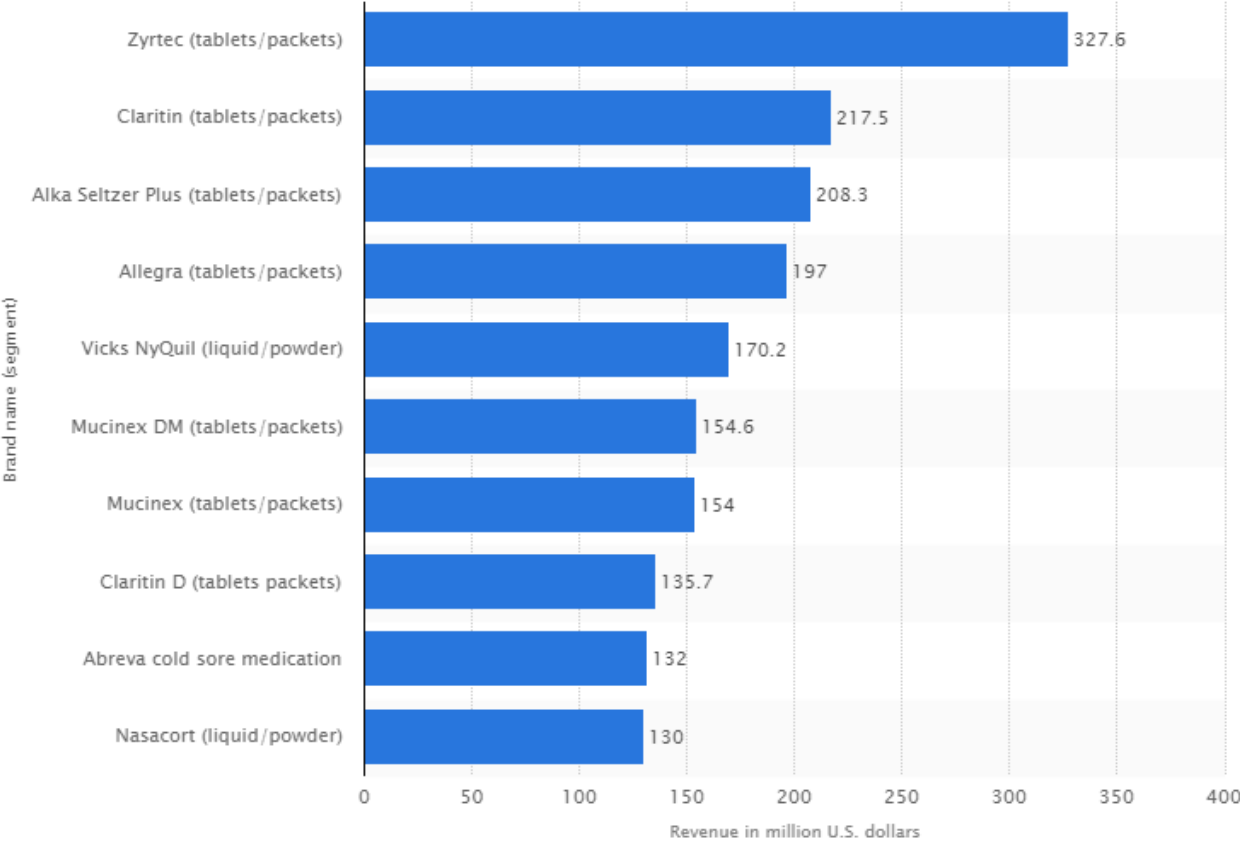
This statistic shows the market share of over-the-counter (OTC) cough/cold and allergy products in the United States in 2015, by product category. In that year, nasal products in the United States had a market share of about 7.4 percent. The total cough-cold and allergy market in the United States was valued at about 9.56 billion U.S. dollars in 2015.



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Top 10 OTC brands for cough, cold, allergy and sinus by revenue in the U.S. in 2014 (in million U.S. dollars)*

This statistic shows the top ten OTC (over-the-counter) brands for cough, cold, allergy and sinus by revenue in 2014 in the United States. In that year, Zyrtec was the top OTC brand based on revenue, generating almost 328 million U.S. dollars.

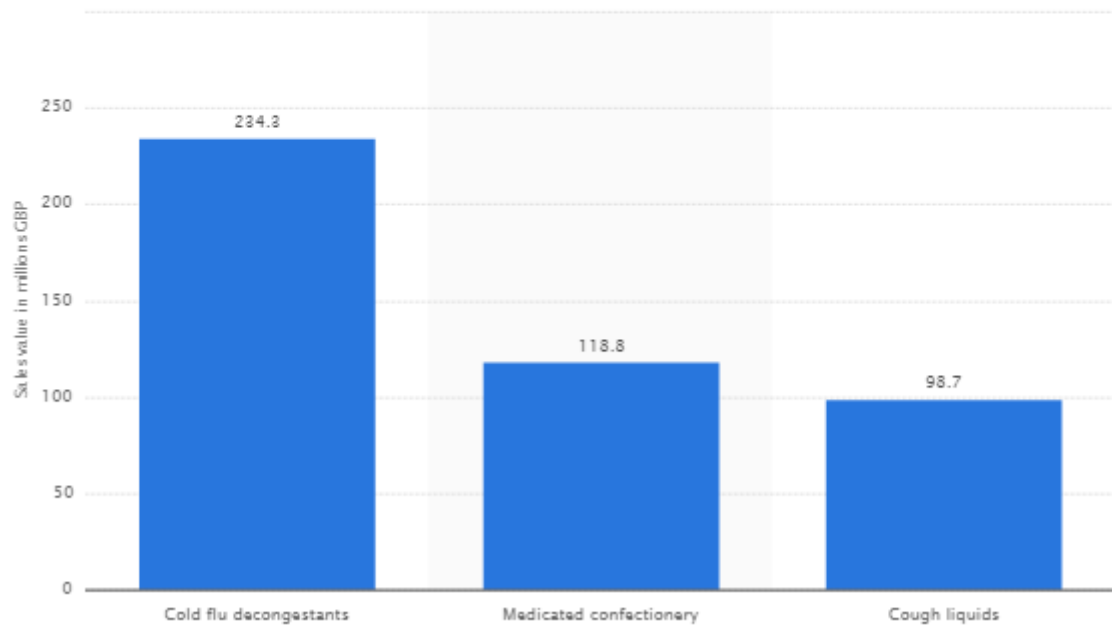


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OTC Category	2007	2008	2009	2010
Acne Remedies	\$332	\$338	\$339	\$350
Analgesics, External	\$315	\$318	\$305	\$313
Analgesics, Internal (includes other pain products)	\$2,424	\$2,451	\$2,492	\$2,341
Antidiarrheals	\$176	\$169	\$166	\$163
Anti-Smoking Products	\$507	\$493	\$494	\$485
Cough/Cold and Related	\$3,662	\$4,083	\$4,207	\$4,054
Eye Care	\$441	\$459	\$472	\$500
First Aid	\$624	\$645	\$650	\$675
Foot Care	\$357	\$349	\$336	\$336
Heartburn (includes anti-gas)	\$1,268	\$1,242	\$1,270	\$1,386
Laxatives	\$758	\$807	\$822	\$832
Lip Remedies	\$403	\$417	\$407	\$419
Oral Antiseptics and Rinses	\$728	\$744	\$731	\$722
Sunscreens and Blocks	\$414	\$477	\$499	\$550
Toothpaste	\$1,246	\$1,251	\$1,268	\$1,288
All Others	\$2,394	\$2,515	\$2,525	\$2,557

Sales value of over-the-counter (OTC) cough/cold/sore throat medicines in Great Britain in 2014, by category (in millions GBP)

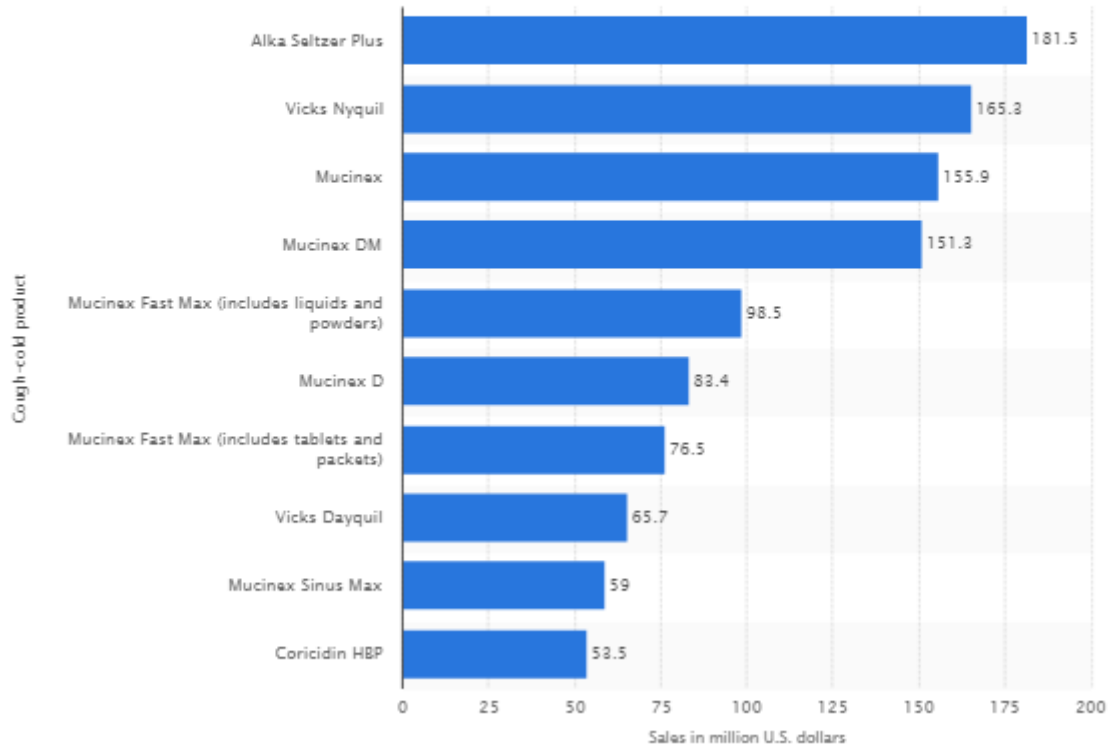
This statistic displays the breakdown of the over-the-counter (OTC) medicine sales for cough, cold and sore throat in Great Britain in 2014. In this year cold flu decongestants accounted for 234.3 million GBP of over-the-counter sales in this area.



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Annual sales of the leading cough-cold remedies* in the United States in July 2014**, in million U.S. dollars

This statistic shows the annual sales of the leading cough-cold remedies in the United States as of July 2014, in million U.S. dollars. That year, Alka Seltzer Plus brought in 181.5 million U.S. dollars in sales.



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Sales of over-the-counter medicine product segments in the United States in 2012, by type of outlet (in billion U.S. dollars)

This statistic shows the market value of over-the-counter product segments in the United States in 2012, by outlet type. In that year, the pain relief segment of multi-store outlets accounted for 4.23 billion U.S. dollars of the United States' over-the-counter market. The total value of the over-the-counter market in the United States is worth about 38.3 billion U.S. dollars.

Search:

Records: 10

Segment	Multi-outlet*	Drug
Cough/cold/allergy/sinus	7.41	3.24
Vitamins	6.1	2.14
Digestives	5.37	1.94
Weight loss/nutritional meal replacements	5.06	0.59
Pain relief	4.23	1.64
First aid	2.7	-
Eye care/ear care	1.79	0.68
Misc. health remedies	1.3	-
Diagnostics	1	0.56
Foot care	1	-

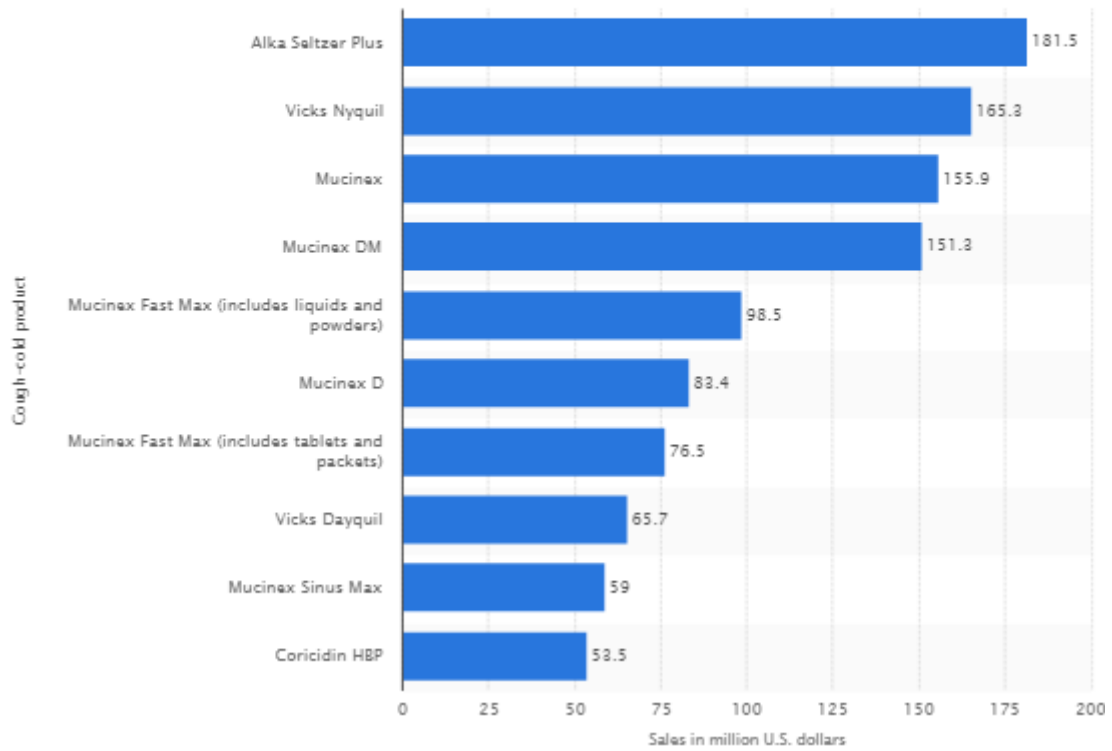
Showing entries 1 to 10 (14 entries in total)

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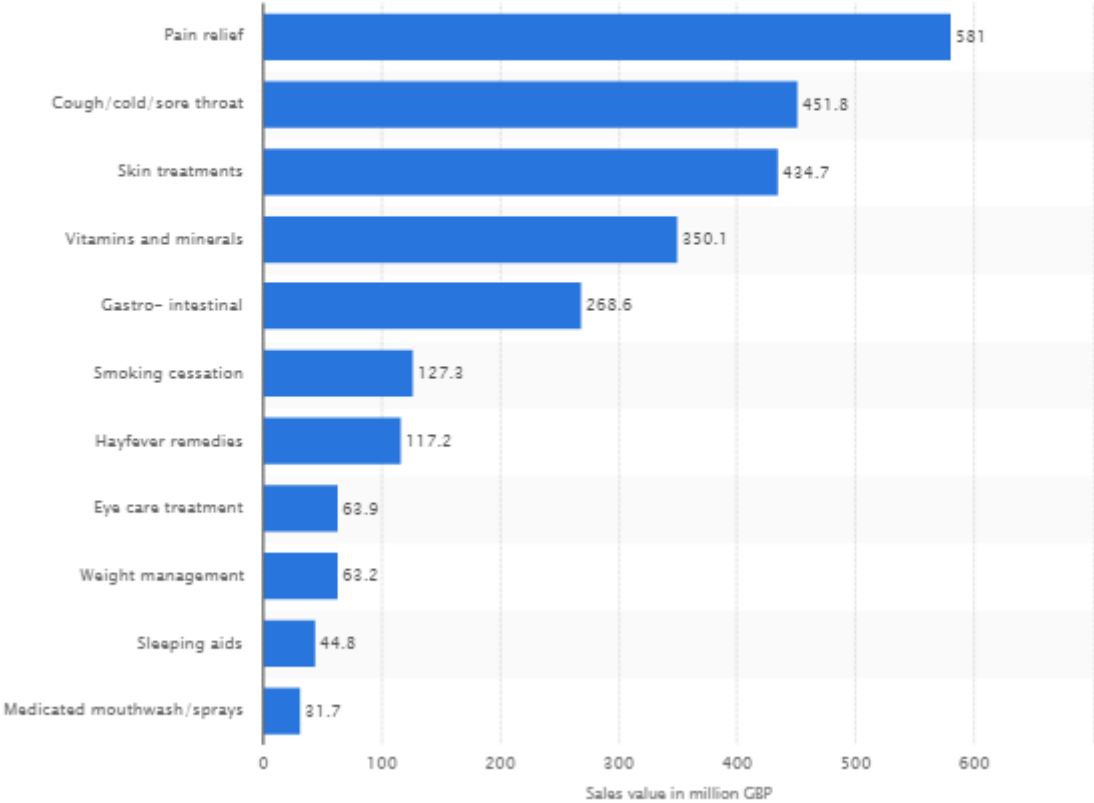
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Sales value of over-the-counter (OTC) medicines in Great Britain in 2014, by medicine category (in millions GBP)

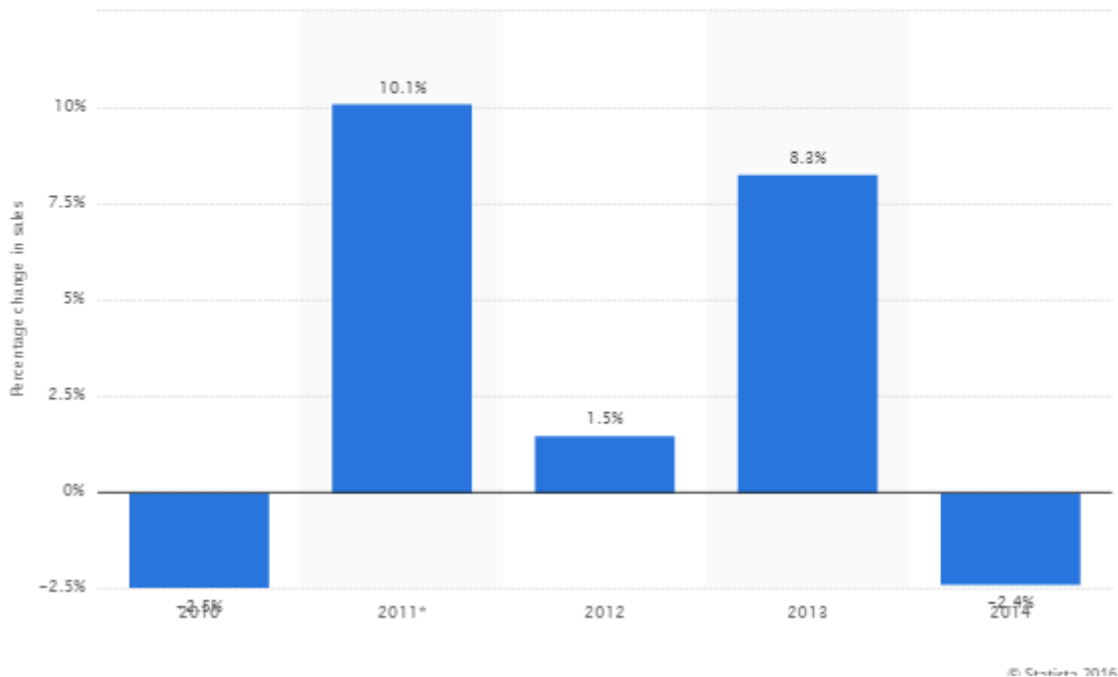
This statistic displays the breakdown of the over-the-counter (OTC) medicine market in Great Britain in 2014. The total sales value of OTC drugs was 2.53 billion GBP in 2014. In this period, pain relief accounted for 581 million GBP.



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Annual change in sales value of OTC medicated mouthwash and sprays in Great Britain from 2010 to 2014

This statistic displays the annual change in sales value of over-the-counter medicated mouthwash and sprays in Great Britain from 2010 to 2014. Sales of OTC medicated mouthwash grew by 10.1 percent in 2011.



Market Stats and Sales Overview

Do cold and flu remedies sell? Will immunity be big this year? What products are people buying? Can over-the-counter prescriptions help? Get these and other questions answered in our immunity market overview.

From 2007 to 2008, sales of cold/cough/sore throat remedies in the U.S. grew 10.7 percent, to \$4.6 billion, in food, drug, and mass stores excluding Walmart, according to Schaumburg, Ill.-based market research firm SPINS.

Sales of natural cold and flu remedies in supermarkets have decreased slightly between 2007 and 2009, from \$59.4 million to \$58.2 million, according to Chicago-based market research firm Mintel's analysis of SPINS data.

Nearly a quarter of those who had coughs, colds, sore throats or flu in the past 12 months have tried homeopathic or herbal remedies, according to data from Mintel. (But although herbal and alternative remedies will likely continue to be popular, the current economic state of the U.S. may preclude any furthering of the trend, and a backsliding may even occur, due to the often more expensive nature of these types of remedies, Mintel researchers say.)

Mintel predicts an increase of 18 percent in sales of OTC medicines in the next five years, as consumers become increasingly reluctant to take time off work due to sickness. However, Mintel researchers note: “The U.S. recession could be a double-edged sword for OTC cough/cold remedies, driving some to the more affordable OTC aisle instead of seeing a physician, while driving others to home remedies or preventative measures instead of OTC medicines.”

“Mintel reports that Hispanics, who have low rates of health insurance, are more likely than other ethnicities to use home remedies and homeopathic/herbal medicines, along with OTC remedies, to treat even severe conditions like the flu. “Hispanics also tend to favor symptom-specific remedies more than other ethnicities—suggesting another possible avenue for reaching these consumers. Emphasizing efficacy for severe symptoms will be key in reaching this demographic,” researchers say. However, they note that “the language barrier for a number of Hispanics means that they are less likely to comparison shop; therefore, easy-to-read and readily identifiable brand logos will aid brand loyalty among this ethnicity. Additionally, in-store, Spanish-language cold/flu clinics sponsored by specific remedy brands will likely raise brand awareness.”

Sales of cough drops and syrups/sore throat liquids increased between 2006 and 2008, beneficiaries of the demand for single-symptom remedies, according to Mintel.

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