

Cough/Cold, Allergy & Analgesics

ANALGESIC TRENDS

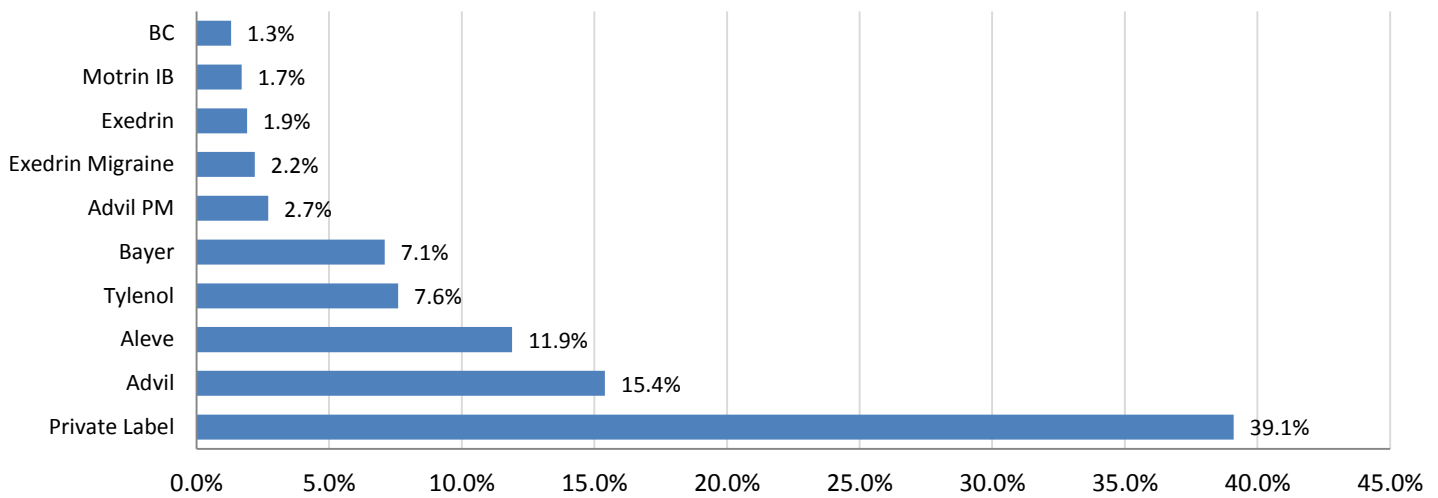
Private label analgesics make up nearly 40% of the total market. (See below chart)

As Johnson & Johnson and Novartis push to get their largest analgesics brands back to pre-recall levels through a series of awareness campaigns, many consumers shift their purchasing preferences back to branded products. This helped the category to continue to thrive in 2014, achieving the second-strongest single-year growth in retail value sales of the past decade, trailing only 2013 when several brands were reintroduced to the market.*

**Euromonitor International*

Percentage of the total analgesic-internal tablet sales in the United States in 2014, by leading brands.

The statistic shows the percentage of total analgesic-internal tablet sales in the United States in 2014, by leading brands in that period, the Tylenol brand had 7.6 percent of total dollar sales in the United States.



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ANALGESIC OPPORTUNITY

An aging baby boomer population and subsequent rise in geriatric population, and rising therapeutic benefits of pain treatment drugs (internal) are major factors driving growth in the global analgesics market.

**BizAcumen Inc.*

PACKAGING, BRANDING & MESSAGING

Store brand and national brands (such as Nyquil) offer combination packs targeting both daytime and nighttime symptoms are doing well. The same is true for products that treat allergy symptoms, due to progressively worse allergy seasons.

Encourage consumers to replenish their supply of products each season. Remind consumers to check expiration dates. Since 43% of remedy users throw out expired products, this could be an opportunity to increase purchase cycles.

**Mintel*

ALLERGY FACTS

Allergy remedies are typically determined by the severity of the season. Recent severe allergy seasons have been positive news for the market. Sales have increased and are expected to continue to climb thanks to milder temperatures and increased pollen counts, which lead to higher incidence of allergies and therefore a greater need for allergy treatments.

**Mintel*

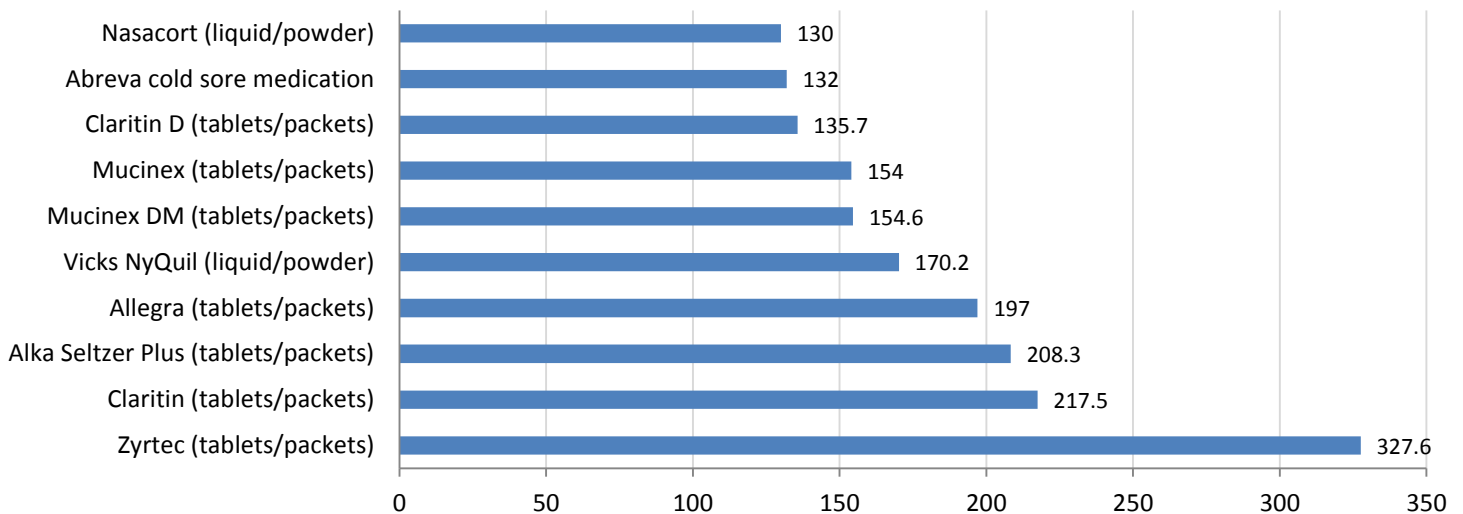
COLD INDUSTRY HIGHLIGHTS

- Annual Revenue of OTC cold medicine is approximately \$8 BILLION* (See below chart for breakdown of sales)
- Annual Growth 2010-2015 of 1.9%*
- Those aged 18-24 are least likely to use OTC remedies and are more likely to say they don't treat the ailments.**
- Almost six out of 10 who use OTC products to treat cold, flu, and allergies say they keep these products on hand for when they need them. Only 31% say they purchase when they begin feeling symptoms.*

*(IBISworld)**Mintel

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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COUGH & COLD COMPETITIVE LANDSCAPE

Store Brand vs Brand Name

Private label OTC sales are giving brand names a run for their money, thanks to both name-brand recalls and a desire on the part of consumers to save money.

Across the board in OTC remedies, there has been an increase in private label sales—both as a reaction to Johnson & Johnson recalls and as a cost saving measure.

*Mintel

Homeopathic Approach

The United States has lagged somewhat behind the rest of the world when it comes to the popularity of homeopathic medicine, but sales numbers prove that is changing. Homeopathy has grown from a \$200 million category to a \$1.5 billion category over the last decade.

*Homeolab USA

THE COLD IS ALL TOO COMMON

- One billion people will get a cold this year.
- Adults will suffer an average of two to four colds per year.
- Young children may suffer an average of six to eight.
- Colds account for more doctor visits than any other condition.
- Peak cold season is generally September to May.

*American Lung Association