Cough, Cold & Allergy

Nicholas Hall's CHC REPORTS

Unpicking the CCA market's prospects in an altered world

- Covering all the issues affecting the **CCA** market, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, this report spans **10 in-depth country profiles** (plus shorter profiles of selected markets) with insights and predictions.
- With launch activity in CCA slowing, has the impetus shifted from quantity to quality? **New product developments** are explored across markets, including Rx-to-OTC switches, delivery format innovations, new benefits and more.
- **Brand case studies** evaluate the key lessons to be learned from top brands, including consumer messaging, line extensions, portfolio development and brand strategies.
- The report features the **latest sales data** from our dedicated ***DB6*** database, including topline historical sales by region, country and category, and individual brand performances.

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2021 in focus...

2021 saw Cough, Cold & Allergy sales return to positive growth (+4.4%) after successive periods of decline following a historic low-level incidence of colds & flu. All CCA categories posted gains, with cough remedies and topical decongestants among the larger drivers, alongside strong growth in smaller segments such as asthma remedies and chest rubs & inhalants. Allergy remedies performed well on the back of a strong allergy season. Nevertheless, globally CCA sales remained below their pre-pandemic level.

2022 & beyond...

So what is next for the CCA market? Sales have improved as more viruses circulate among the population, but demand had yet to return to peak pre-pandemic levels by the end of 2021.

- Will the market continue to recover and what will be the key growth drivers in future?
- How has consumer behaviour shifted in the wake of Covid?
- Will the shift to e-Commerce channels shape the strategies of CCA players?
- The level of NPD activity in CCA has dropped year on year since its peak in 2017, but will the latest Rx-to-OTC switches or other innovations hold the key to unlocking growth?
- What are marketers doing to open up sales beyond the traditional cold & flu season?
- With an eye on immune supplements, undoubtedly boosted by the pandemic but levelling off in 2021, to what extent is the prevention / treatment balance shifting across different markets?

10 individual markets profiled

Australia Brazil China France Germany India Italy Japan Poland USA

Plus coverage of Canada, Russia and UK in brief

Categories covered in this report

Cough remedies • Systemic cold & flu • Topical decongestants • Systemic decongestants • Chest rubs & inhalants • Sore throat remedies & medicated confectionery • Allergy remedies • Asthma remedies† • Immune supplements*

†selected markets only *tracked under VMS in *DB6*

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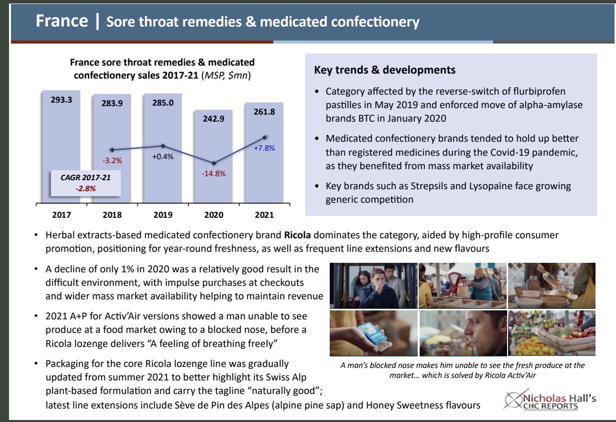

France | Sore throat remedies & medicated confectionery

Key trends & developments

- Category affected by the reverse-switch of flurbiprofen pastilles in May 2019 and enforced move of alpha-amylase brands BTC in January 2020
- Medicated confectionery brands tended to hold up better than registered medicines during the Covid-19 pandemic, as they benefited from mass market availability
- Key brands such as Strepsils and Lysopaïne face growing generic competition

- Herbal extracts-based medicated confectionery brand **Ricola** dominates the category, aided by high-profile consumer promotion, positioning for year-round freshness, as well as frequent line extensions and new flavours
- A decline of only 1% in 2020 was a relatively good result in the difficult environment, with impulse purchases at checkouts and wider mass market availability helping to maintain revenue
- 2021 A+P for Activ'Air versions showed a man unable to see produce at a food market owing to a blocked nose, before a Ricola lozenge delivers "A feeling of breathing freely"
- Packaging for the core Ricola lozenge line was gradually updated from summer 2021 to better highlight its Swiss Alp plant-based formulation and carry the tagline "naturally good"; latest line extensions include Sève de Pin des Alpes (alpine pine sap) and Honey Sweetness flavours

A man's blocked nose makes him unable to see the fresh produce at the market… which is solved by Ricola Activ'Air

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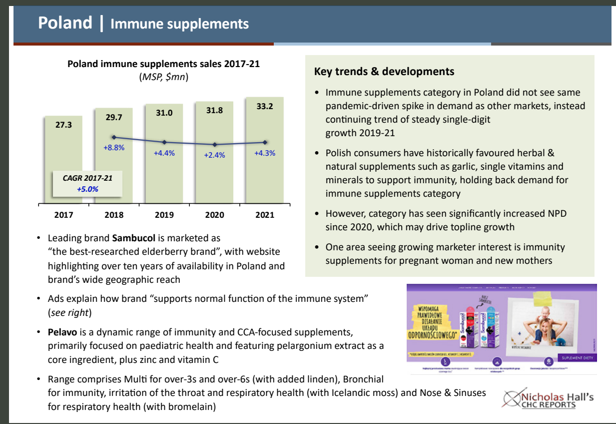

Poland | Immune supplements

Key trends & developments

- Immune supplements category in Poland did not see same pandemic-driven spike in demand as other markets, instead continuing trend of steady single-digit growth 2019-21
- Polish consumers have historically favoured herbal & natural supplements such as garlic, single vitamins and minerals to support immunity, holding back demand for immune supplements category
- However, category has seen significantly increased NPD since 2020, which may drive topline growth
- One area seeing growing marketer interest is immunity supplements for pregnant woman and new mothers

- Leading brand **Sambucol** is marketed as "the best-researched elderberry brand", with website highlighting over ten years of availability in Poland and brand's wide geographic reach
- Ads explain how brand "supports normal function of the immune system" (*see right*)
- **Pelavo** is a dynamic range of immunity and CCA-focused supplements, primarily focused on paediatric health and featuring pelargonium extract as a core ingredient, plus zinc and vitamin C
- Range comprises Multi for over-3s and over-6s (with added linden), Bronchial for immunity, irritation of the throat and respiratory health (with Icelandic moss) and Nose & Sinuses for respiratory health (with bromelain)

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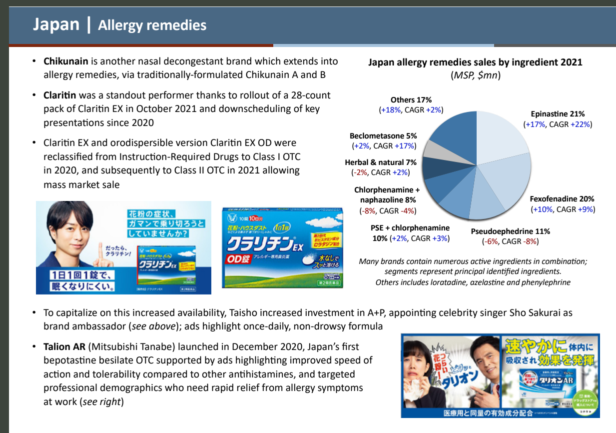

Japan | Allergy remedies

- **Chikunain** is another nasal decongestant brand which extends into allergy remedies, via traditionally-formulated Chikunain A and B
- **Claritin** was a standout performer thanks to rollout of a 28-count pack of Claritin EX in October 2021 and downscheduling of key presentations since 2020
- Claritin EX and orodispersible version Claritin EX OD were reclassified from Instruction-Required Drugs to Class I OTC in 2020, and subsequently to Class II OTC in 2021 allowing mass market sale

Many brands contain numerous active ingredients in combination; segments represent principal identified ingredients. Others includes loratadine, azelastine and phenylephrine

- To capitalize on this increased availability, Taisho increased investment in A+P, appointing celebrity singer Sho Sakurai as brand ambassador (*see above*); ads highlight once-daily, non-drowsy formula
- **Talion AR** (Mitsubishi Tanabe) launched in December 2020, Japan's first bepotastine besilate OTC supported by ads highlighting improved speed of action and tolerability compared to other antihistamines, and targeted professional demographics who need rapid relief from allergy symptoms at work (*see right*)

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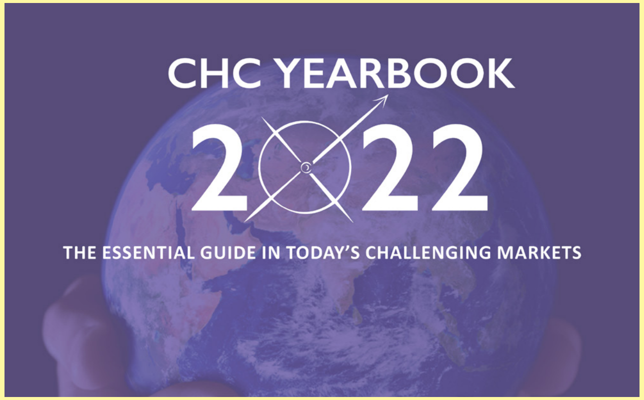

Nicholas Hall Europe Ltd, 35 Alexandra Street, Southend-on-Sea, SS1 1BW, UK
E: info@NicholasHall.com • W: www.NicholasHall.com • T: +44(0)1702 220 200

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