

# **Allergy Relief**

## **Latest trends & developments in remedies for nasal, skin and eye allergy symptoms and asthma**

**(264 pages)**

Definitions & methodology

### **Executive summary (17 pages)**

Global Allergy Relief market

*Global allergy relief sales by category mid-2017*

*Global allergy relief sales mid-2016 & mid-2017*

*Net contribution of categories to global allergy relief sales growth mid-2017*

*Global allergy relief sales by region and category mid-2017*

*Global allergy relief markets mid-2017*

Key growth drivers of Allergy Relief market

*Demographic & environmental factors in growing allergy prevalence*

The importance of NPD

Who are the main players in Allergy Relief?

Johnson & Johnson

*J&J allergy relief sales by brand 2016*

Sanofi

*Sanofi allergy relief sales by brand 2016*

Bayer

*Bayer allergy relief sales by brand 2016*

GlaxoSmithKline

*GSK allergy relief sales by brand 2016*

Is there any Rx-to-OTC switch potential left?

Are there any switch opportunities in allergy remedies remaining?

Summing up the Outlook for Allergy relief

*Global forecast allergy sales by category 2021-26*

Strongest opportunities for future growth

### **Leading Allergy Relief Markets**

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*Australia allergy sales mid-2016 & mid-2017*

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*Australia allergy sales by category mid-2017*

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*Australia leading allergy marketers mid-2017*

*Australia leading allergy brands mid-2017*

*Legal status of key allergy ingredients in Australia*

TGA reforms advertising of S3 brands in 2018

Allergy remedies (5pp)

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*Australia allergy remedies sales mid-2016 & mid-2017*

*Australia top brands' share of allergy remedies sales mid-2017*  
*Australia leading allergy remedies mid-2017*  
*Allergy regulatory reform increases pack sizes and expands paediatric segment*  
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*Australia top brands' share of eye allergy sales mid-2017*  
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Anti-itch (2pp)

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Asthma remedies (1pp)

Asthma remedies trends  
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Other allergy products (2pp)

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Outlook (1pp)

Innovation and education will contribute to a bright future  
*Australia forecast allergy sales 2021-26*

**Brazil (11 pages)**

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*Brazil allergy sales mid-2016 & mid-2017*  
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*Brazil allergy sales by category mid-2017*  
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*Brazil leading allergy marketers mid-2017*  
Hypermarcas rebrands as Hypera Pharma  
*Brazil leading allergy brands mid-2017*  
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Allergy remedies (3pp)

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*Brazil allergy remedies sales mid-2016 & mid-2017*  
*Brazil top brands' share of allergy remedies sales mid-2017*  
*Brazil leading allergy remedies mid-2017*  
ANVISA's 2016 update of OTC regulations introduces a clearer path for Rx-to-OTC switch

Anti-itch (2pp)

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Other allergy products (1pp)

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ANVISA's updated OTC regulations set to drive innovation and expand categories via clearer switch path

*Brazil forecast allergy sales 2021-26*

**Canada (12 pages)**

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*Canada allergy remedies sales by segment mid-2017*

Eye allergy (1pp)

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Other allergy products (1pp)

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Switch opportunities will expand underdeveloped categories and segments

*Canada forecast allergy sales 2021-26*

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Chinese Government attempts to revive traditional medicine with new TCM law in 2017

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Anti-itch (3pp)

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Consun increases stakes in Guangxi Yulin, with plans to revitalise and expand

Asthma remedies (2pp)

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*China asthma remedies sales mid-2016 & mid-2017*

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*China forecast allergy sales 2021-26*

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Anti-itch trends

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Other allergy products (1pp)

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Rising allergy incidence to help boost growth

*France forecast allergy sales 2021-26*

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*Germany allergy remedies sales by segment mid-2017*

Eye allergy (1pp)

Eye allergy trends

*Germany eye allergy sales mid-2016 & mid-2017*

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Anti-itch (3pp)

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*Germany anti-itch sales mid-2016 & mid-2017*

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Other allergy products (2pp)

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Outlook (1pp)

Switch opportunities an avenue for category expansion

*Germany forecast allergy sales 2021-26*

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### Allergy remedies (3pp)

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*India allergy remedies sales mid-2016 & mid-2017*

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Air pollution leads to surge in respiratory ailments

### Anti-itch (2pp)

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Allergy has strong potential as a true OTC category

*India forecast allergy sales 2021-26*

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Outlook (1pp)

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*Italy forecast allergy sales 2021-26*

**Japan (20 pages)**

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*Japan allergy sales by category mid-2017*

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*Japan allergy remedies sales mid-2016 & mid-2017*

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Downscheduling and recommended switches suggest a bright future

*Japan forecast allergy sales 2021-26*

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*Poland forecast allergy sales 2021-26*

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Other allergy products (2pp)

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Outlook (1pp)

Competitive nature of market set to continue  
*USA forecast allergy sales 2021-26*

**Scientific Studies (5 pp)**

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Supplements  
Vitamin D  
Low maternal vitamin E linked to childhood asthma  
Fatty acids  
Capsaicin nasal spray effective for mixed rhinitis  
Probiotics  
Probiotic + peanut combination may treat peanut allergy  
Bilastine – an antihistamine with OTC potential  
Conclusion: studies link pre- and neonatal supplementation with increased tolerance against allergies

**Brand case studies (15 pages)**

**Allegra (Sanofi) (2pp)**

*Allegra allergy relief sales 2012-16*  
*Allegra leading allergy relief markets mid-2017*  
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**Benadryl (J&J) (2pp)**

*Benadryl allergy relief sales 2012-16*  
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**Claritin (Bayer) (2pp)**

*Claritin allergy relief sales 2012-16*

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Success factors

**Fenistil (GSK) (2pp)**

*Fenistil allergy relief sales 2012-16*

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Success factors

**Flonase (GSK) (3pp)**

*Flonase allergy relief sales 2012-16*

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Success factors

**Nasacort (Sanofi) (1pp)**

*Nasacort allergy relief sales 2012-16*

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Success factors

**Rhinocort (J&J) (1pp)**

*Rhinocort allergy relief sales 2012-16*

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Success factors

**Zyrtec (J&J, UCB) (2pp)**

*Zyrtec allergy relief sales 2012-16*

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Success factors

**Outlook (11 pages)**

Global outlook for Allergy Relief market

*Global forecast allergy sales by category 2021-26*

*Global forecast allergy sales by region 2021-26*

Outlook across key markets

*North America forecast allergy sales 2021-26*

*Asia-Pacific forecast allergy sales 2021-26*

*Western Europe forecast allergy sales 2021-26*

*C&E Europe forecast allergy sales 2021-26*

*Latin America forecast allergy sales 2021-26*

New antihistamines and nasal corticosteroids offer switch opportunities

Opportunities & threats

Strongest opportunities for future growth