

# Cough, Cold & Allergy 2022

## Unpicking the CCA Market's Prospects in an Altered World

(379 Pages)

Definitions & methodology (2 pages)

### Executive Summary (27 pages)

#### Global CCA overview (9 pages)

Key global CCA trends

*Chart: Global CCA sales 2017-21 (MSP, \$mn)*

*Chart: Global CCA sales by category 2021 (MSP, \$mn)*

*Chart: Global CCA sales by region 2021 (MSP, \$mn)*

*Chart: Global leading CCA markets 2021 (MSP, \$mn)*

*Chart: Net contribution of categories to global CCA sales growth 2021 (MSP, \$mn)*

*Chart: Global CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

*Chart: Global leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Global leading CCA brands 2021 (MSP, \$mn)*

*Chart: Global CCA sales by channel 2021 (MSP, \$mn)*

*Chart: Global leading internet & mail order CCA markets 2021 (MSP, \$mn)*

*Chart: Global leading internet & mail order CCA brands 2021 (MSP, \$mn)*

*Chart: Global leading direct sales CCA brands 2021 (MSP, \$mn)*

Covid-19 and changes to consumer behaviour

MAT Q1 2022 sales update shows CHC sales bouncing back, driven by CCA

*Chart: Global leading CCA markets sales growth MAT Q1 2022 (MSP, \$mn)*

#### Systemic cold & flu (2 pages)

Key trends & developments

*Chart: Global systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Global leading systemic cold & flu remedies 2021 (MSP, \$mn)*

#### Cough remedies (2 pages)

Key trends & developments

*Chart: Global cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Global leading cough remedies 2021 (MSP, \$mn)*

#### Sore throat remedies & medicated confectionery (2 pages)

Key trends & developments

*Chart: Global sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Global leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

#### Topical decongestants (2 pages)

Key trends & developments

*Chart: Global topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Global leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (2 pages)

Key trends & developments

*Chart: Global systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Global leading systemic decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: Global chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: Global leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (2 pages)

Key trends & developments

*Chart: Global allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Global leading allergy remedies 2021 (MSP, \$mn)*

### Immune supplements (2 pages)

Key trends & developments

*Chart: Global immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Global leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Virtually all CCA markets worldwide will see strong positive growth in 2022 & 2023

*Chart: Global CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Longer terms prospects are solid if more muted

*Chart: Global CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Australia (28 pages)**

### Overview (4 pages)

CCA trends in Australia

*Chart: Australia CCA sales 2017-21 (MSP, \$mn)*

*Chart: Australia CCA sales by category 2021 (MSP, \$mn)*

*Chart: Australia leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Australia leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Australia*

*Chart: Australia CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (3 pages)

Key trends & developments

*Chart: Australia systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: Australia cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading cough remedies 2021 (MSP, \$mn)*

*Chart: Australia cough remedies sales by ingredient 2021 (MSP, \$mn)*

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Australia sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: Australia topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (1 page)

Key trends & developments

*Chart: Australia systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading systemic decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: Australia chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (3 pages)

Key trends & developments

*Chart: Australia allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Australia allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (2 pages)

Key trends & developments

*Chart: Australia immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Australia leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Continued growth driven by seasonal factors

*Chart: Australia CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Switches and NPD will drive growth

*Chart: Australia CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Brazil (32 pages)**

### Overview (4 pages)

CCA trends in Brazil

*Chart: Brazil CCA sales 2017-21 (MSP, \$mn)*

*Chart: Brazil CCA sales by category 2021 (MSP, \$mn)*

*Chart: Brazil leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Brazil leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Brazil*

*Chart: Brazil CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

#### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (5 pages)

Key trends & developments

*Chart: Brazil systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: Brazil cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading cough remedies 2021 (MSP, \$mn)*

*Chart: Brazil cough remedies sales by ingredient 2021 (MSP, \$mn)*

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Brazil sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: Brazil topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (1 page)

Key trends & developments

*Chart: Brazil systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading systemic decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (2 page)

Key trends & developments

*Chart: Brazil chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (3 pages)

Key trends & developments

*Chart: Brazil allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Brazil allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (3 pages)

Key trends & developments

*Chart: Brazil immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Brazil leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Influx of new launches by established brands into adjacent categories to overcome slowing sales

*Chart: Brazil CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Covid case resurgence likely to drive immunity to become a key positioning for future launches

*Chart: Brazil CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **China (31 pages)**

### Overview (4 pages)

CCA trends in China

*Chart: China CCA sales 2017-21 (MSP, \$mn)*

*Chart: China CCA sales by category 2021 (MSP, \$mn)*

*Chart: China leading CCA marketers 2021 (MSP, \$mn)*

*Chart: China leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in China*

*Chart: China CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (5 pages)

Key trends & developments

*Chart: China systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: China leading systemic cold & flu remedies 2021 (MSP, \$mn)*

Systemic cold & flu: Latest Rx-to-OTC switch approvals

### Cough remedies (4 pages)

Key trends & developments

*Chart: China cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: China leading cough remedies 2021 (MSP, \$mn)*

*Chart: China cough remedies sales by ingredient 2021 (MSP, \$mn)*

Cough remedies: Latest Rx-to-OTC switch approvals

### Sore throat remedies & medicated confectionery (4 pages)

Key trends & developments

*Chart: China sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: China leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

Sore throat remedies: Latest Rx-to-OTC switch approvals

### Topical decongestants (2 pages)

Key trends & developments

*Chart: China topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: China leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (1 page)

Key trends & developments

*Chart: China systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: China leading systemic decongestants 2021 (MSP, \$mn)*

Systemic decongestants: Latest Rx-to-OTC switch approvals

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: China chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: China leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (3 pages)

Key trends & developments

*Chart: China allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: China leading allergy remedies 2021 (MSP, \$mn)*

*Chart: China allergy remedies sales by ingredient 2021 (MSP, \$mn)*

Allergy remedies: Latest Rx-to-OTC switch approvals

### Immune supplements (2 pages)

Key trends & developments

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Government's enforcement of zero-Covid policy leads to market uncertainties

*Chart: China CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Covid case resurgence likely to slow market and affect long-term outlook

*Chart: China CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **France (26 pages)**

### Overview (4 pages)

CCA trends in France

*Chart: France CCA sales 2017-21 (MSP, \$mn)*

*Chart: France CCA sales by category 2021 (MSP, \$mn)*

*Chart: France leading CCA marketers 2021 (MSP, \$mn)*

*Chart: France leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in France*

*Chart: France CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

#### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (3 pages)

Key trends & developments

*Chart: France systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: France leading systemic cold & flu remedies 2021 (MSP, \$mn)*

Safety warnings affect PSE-based vasoconstrictors

### Cough remedies (4 pages)

Key trends & developments

*Chart: France cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: France leading cough remedies 2021 (MSP, \$mn)*

*Chart: France cough remedies sales by ingredient 2021 (MSP, \$mn)*

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: France sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: France leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: France topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: France leading topical decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: France chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: France leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (2 pages)

Key trends & developments

*Chart: France allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: France leading allergy remedies 2021 (MSP, \$mn)*

### Immune supplements (1 pages)

Key trends & developments

*Chart: France immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: France leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: CCA market slowly returning to former size

*Chart: France CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Product safety and price likely to be key battlegrounds

*Chart: France CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Germany (29 pages)**

### Overview (4 pages)

CCA trends in Germany

*Chart: Germany CCA sales 2017-21 (MSP, \$mn)*

*Chart: Germany CCA sales by category 2021 (MSP, \$mn)*

*Chart: Germany leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Germany leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Germany*

*Chart: Germany CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (2 pages)

Key trends & developments

*Chart: Germany systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: Germany cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading cough remedies 2021 (MSP, \$mn)*

*Chart: Germany cough remedies sales by ingredient 2021 (MSP, \$mn)*



### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Germany sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: Germany topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (2 page)

Key trends & developments

*Chart: Germany systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading systemic decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: Germany chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (3 pages)

Key trends & developments

*Chart: Germany allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Germany allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (3 pages)

Key trends & developments

*Chart: Germany immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Germany leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: A strong rebound for CCA sales in 2022-23

*Chart: Germany CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Rapid recovery will give way to more modest growth

*Chart: Germany CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **India (24 pages)**

### Overview (4 pages)

CCA trends in India

*Chart: India CCA sales 2017-21 (MSP, \$mn)*

*Chart: India CCA sales by category 2021 (MSP, \$mn)*

*Chart: India leading CCA marketers 2021 (MSP, \$mn)*

*Chart: India leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in India*

*Chart: India CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (3 pages)

Key trends & developments

*Chart: India systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: India leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: India cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: India leading cough remedies 2021 (MSP, \$mn)*

*Chart: India cough remedies sales by ingredient 2021 (MSP, \$mn)*

New safety review for leading brands

### Sore throat remedies & medicated confectionery (2 pages)

Key trends & developments

*Chart: India sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: India leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (2 pages)

Key trends & developments

*Chart: India topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: India leading topical decongestants 2021 (MSP, \$mn)*

### Chest rubs & inhalants (1 page)

Key trends & developments

*Chart: India chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: India leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (2 pages)

Key trends & developments

*Chart: India allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: India leading allergy remedies 2021 (MSP, \$mn)*

*Chart: India allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (2 pages)

Key trends & developments

*Chart: India immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: India leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Slow return to high growth

*Chart: India CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Fully fledged OTC CCA market in the future?

*Chart: India CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Italy (26 pages)**

### Overview (4 pages)

CCA trends in Italy

*Chart: Italy CCA sales 2017-21 (MSP, \$mn)*

*Chart: Italy CCA sales by category 2021 (MSP, \$mn)*

*Chart: Italy leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Italy leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Italy*

*Chart: Italy CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (3 pages)

Key trends & developments

*Chart: Italy systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: Italy cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading cough remedies 2021 (MSP, \$mn)*

*Chart: Italy cough remedies sales by ingredient 2021 (MSP, \$mn)*

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Italy sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: Italy topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (1 page)

Key trends & developments

*Chart: Italy systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading systemic decongestants 2021 (MSP, \$mn)*

### Allergy remedies (2 pages)

Key trends & developments

*Chart: Italy allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Italy allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (2 pages)

Key trends & developments

*Chart: Italy immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Italy leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Growth across all categories

*Chart: Italy CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Steady growth across fragmented market

*Chart: Italy CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Japan (26 pages)**

### Overview (4 pages)

CCA trends in Japan

*Chart: Japan CCA sales 2017-21 (MSP, \$mn)*

*Chart: Japan CCA sales by category 2021 (MSP, \$mn)*

*Chart: Japan leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Japan leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Japan*

*Chart: Japan CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

## Impact of Covid (2 page)

Timeline of Covid restrictions

## Systemic cold & flu (4 pages)

Key trends & developments

*Chart: Japan systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Japan leading systemic cold & flu remedies 2021 (MSP, \$mn)*

## Cough remedies (3 pages)

Key trends & developments

*Chart: Japan cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Japan leading cough remedies 2021 (MSP, \$mn)*

*Chart: Japan cough remedies sales by ingredient 2021 (MSP, \$mn)*

## Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Japan sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Japan leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

## Topical decongestants (2 pages)

Key trends & developments

*Chart: Japan topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Japan leading topical decongestants 2021 (MSP, \$mn)*

## Allergy remedies (4 pages)

Key trends & developments

*Chart: Japan allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Japan leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Japan allergy remedies sales by ingredient 2021 (MSP, \$mn)*

## Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Continued focus on domestic consumers

*Chart: Japan CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Launch and switch activity drives long-term recovery

*Chart: Japan CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Poland (28 pages)**

### Overview (4 pages)

CCA trends in Poland

*Chart: Poland CCA sales 2017-21 (MSP, \$mn)*

*Chart: Poland CCA sales by category 2021 (MSP, \$mn)*

*Chart: Poland leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Poland leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in Poland*

*Chart: Poland CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

## Regulations & classifications (1 page)

### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (3 pages)

Key trends & developments

*Chart: Poland systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading systemic cold & flu remedies 2021 (MSP, \$mn)*

### Cough remedies (3 pages)

Key trends & developments

*Chart: Poland cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading cough remedies 2021 (MSP, \$mn)*

*Chart: Poland cough remedies sales by ingredient 2021 (MSP, \$mn)*

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: Poland sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: Poland topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (2 page)

Key trends & developments

*Chart: Poland systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading systemic decongestants 2021 (MSP, \$mn)*

### Allergy remedies (3 pages)

Key trends & developments

*Chart: Poland allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Poland allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Immune supplements (2 pages)

Key trends & developments

*Chart: Poland immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: Poland leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Sales to stabilise in most categories

*Chart: Poland CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

Innovation will be driver of future growth

*Chart: Poland CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## USA (38 pages)

### Overview (4 pages)

CCA trends in USA

*Chart: USA CCA sales 2017-21 (MSP, \$mn)*

*Chart: USA CCA sales by category 2021 (MSP, \$mn)*

*Chart: USA leading CCA marketers 2021 (MSP, \$mn)*

*Chart: USA leading CCA brands 2021 (MSP, \$mn)*

*Chart: Legal status of selected CCA ingredients in USA*

*Chart: USA CCA sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)*

### Regulations & classifications (1 page)

#### Impact of Covid (1 page)

Timeline of Covid restrictions

### Systemic cold & flu (5 pages)

Key trends & developments

*Chart: USA systemic cold & flu sales 2017-21 (MSP, \$mn)*

*Chart: USA leading systemic cold & flu remedies 2021 (MSP, \$mn)*

Theraflu Rest & Recover fund

### Cough remedies (4 pages)

Key trends & developments

*Chart: USA cough remedies sales 2017-21 (MSP, \$mn)*

*Chart: USA leading cough remedies 2021 (MSP, \$mn)*

*Chart: USA cough remedies sales by ingredient 2021 (MSP, \$mn)*

Robitussin shuts down coughs so all voices can be heard

### Sore throat remedies & medicated confectionery (3 pages)

Key trends & developments

*Chart: USA sore throat remedies & medicated confectionery sales 2017-21 (MSP, \$mn)*

*Chart: USA leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

### Topical decongestants (3 pages)

Key trends & developments

*Chart: USA topical decongestants sales 2017-21 (MSP, \$mn)*

*Chart: USA leading topical decongestants 2021 (MSP, \$mn)*

### Systemic decongestants (2 page)

Key trends & developments

*Chart: USA systemic decongestants sales 2017-21 (MSP, \$mn)*

*Chart: USA leading systemic decongestants 2021 (MSP, \$mn)*

States overturn PSE Rx rulings

### Chest rubs & inhalants (2 page)

Key trends & developments

*Chart: USA chest rubs & inhalants sales 2017-21 (MSP, \$mn)*

*Chart: USA leading chest rubs & inhalants 2021 (MSP, \$mn)*

### Allergy remedies (5 pages)

Key trends & developments

*Chart: USA allergy remedies sales 2017-21 (MSP, \$mn)*

*Chart: USA leading allergy remedies 2021 (MSP, \$mn)*

*Chart: USA allergy remedies sales by ingredient 2021 (MSP, \$mn)*

### Asthma remedies (1 page)

Key trends & developments

*Chart: USA asthma remedies sales 2017-21 (MSP, \$mn)*

*Chart: USA leading asthma remedies 2021 (MSP, \$mn)*

### Immune supplements (4 pages)

Key trends & developments

*Chart: USA immune supplements sales 2017-21 (MSP, \$mn)*

*Chart: USA leading immune supplements 2021 (MSP, \$mn)*

### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Industry looks to recover from disruption

*Chart: USA CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

CCA market set for further development

*Chart: USA CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Selected Markets in Brief (33 pages)**

### **Canada (10 pages)**

#### Overview (3 pages)

CCA trends in Canada

*Chart: Canada CCA sales 2017-21 (MSP, \$mn)*

*Chart: Canada CCA sales by category 2021 (MSP, \$mn)*

*Chart: Canada leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Canada leading CCA brands 2021 (MSP, \$mn)*

#### Category review (6 pages)

*Chart: Canada leading systemic cold & flu remedies 2021 (MSP, \$mn)*

*Chart: Canada leading cough remedies 2021 (MSP, \$mn)*

*Chart: Canada leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

*Chart: Canada leading topical decongestants 2021 (MSP, \$mn)*

*Chart: Canada leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Canada leading immune supplements 2021 (MSP, \$mn)*



## Outlook, forecasts & opportunities (1 page)

Short-term forecast

CCA market set for modest growth

*Chart: Canada CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Russia (11 pages)**

### Overview (4 pages)

CCA trends in Russia

*Chart: Russia CCA sales 2017-21 (MSP, \$mn)*

*Chart: Russia CCA sales by category 2021 (MSP, \$mn)*

*Chart: Russia leading CCA marketers 2021 (MSP, \$mn)*

*Chart: Russia leading CCA brands 2021 (MSP, \$mn)*

Russia's invasion of Ukraine: Impact on CHC

### Category review (6 pages)

*Chart: Russia leading systemic cold & flu remedies 2021 (MSP, \$mn)*

*Chart: Russia leading cough remedies 2021 (MSP, \$mn)*

*Chart: Russia leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

*Chart: Russia leading topical decongestants 2021 (MSP, \$mn)*

*Chart: Russia leading allergy remedies 2021 (MSP, \$mn)*

*Chart: Russia leading immune supplements 2021 (MSP, \$mn)*

## Outlook, forecasts & opportunities (1 page)

Short-term forecast

Russia's CHC future is not bright

*Chart: Russia CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **UK (11 pages)**

### Overview (3 pages)

CCA trends in UK

*Chart: UK CCA sales 2017-21 (MSP, \$mn)*

*Chart: UK CCA sales by category 2021 (MSP, \$mn)*

*Chart: UK leading CCA marketers 2021 (MSP, \$mn)*

*Chart: UK leading CCA brands 2021 (MSP, \$mn)*

### Category review (7 pages)

*Chart: UK leading systemic cold & flu remedies 2021 (MSP, \$mn)*

*Chart: UK leading cough remedies 2021 (MSP, \$mn)*

*Chart: UK leading sore throat remedies & medicated confectionery 2021 (MSP, \$mn)*

*Chart: UK leading topical decongestants 2021 (MSP, \$mn)*

*Chart: UK leading allergy remedies 2021 (MSP, \$mn)*

*Chart: UK leading immune supplements 2021 (MSP, \$mn)*

## Outlook, forecasts & opportunities (1 page)

Short-term forecast

Switch and NPD activity hold key to long-term growth

*Chart: UK CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

## **Brand Case Studies (13 pages)**

### Bisolvon / Mucosolvan (2 pages)

*Chart: Bisolvon / Mucosolvan CCA sales 2017-21 (MSP, \$mn)*

*Chart: Bisolvon / Mucosolvan sales by country 2021 (MSP, \$mn)*

### Claritin (3 pages)

*Chart: Claritin CCA sales 2017-21 (MSP, \$mn)*

*Chart: Claritin sales by country 2021 (MSP, \$mn)*

### Flonase (2 pages)

*Chart: Flonase CCA sales 2017-21 (MSP, \$mn)*

*Chart: Flonase sales by country 2021 (MSP, \$mn)*

### Robitussin (3 pages)

*Chart: Robitussin CCA sales 2017-21 (MSP, \$mn)*

*Chart: Robitussin sales by country 2021 (MSP, \$mn)*

### Xyzal (2 pages)

*Chart: Xyzal CCA sales 2017-21 (MSP, \$mn)*

*Chart: Xyzal sales by country 2021 (MSP, \$mn)*

## **Outlook (10 pages)**

### An altered world (1 page)

Recovery is on the way for most countries and the future of CCA is bright – but more innovation is needed

### Short-term CCA market forecast (3 pages)

Short-term forecast: Virtually all CCA markets worldwide will see strong positive growth in 2022 & 2023

*Chart: Global CCA short-term forecast sales by category 2022-23 (MSP, \$mn)*

*Chart: Global leading CCA markets short-term forecast sales 2022-23 (MSP, \$mn)*

### Long-term CCA market forecast (3 pages)

In the longer term, CCA prospects are solid if more muted, growing just slightly behind overall CHC market

*Chart: Global CCA 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)*

*Chart: Global leading CCA markets 5 & 10 year forecast sales 2026 & 2031 (MSP, \$mn)*

Prospects for immunity (1 page)

*Chart: Global leading immune supplements markets 5 & 10 year forecast sales 2026 & 2031 (MSP, \$mn)*

A thriving online channel (1 page)

*Global CCA 5 & 10 year forecast sales by channel 2026 & 2031 (MSP, \$mn)*

*Global leading internet & mail order CCA markets 5 & 10 year forecast sales 2026 & 2031 (MSP, \$mn)*