

Cough, Cold & Allergy

Unravelling CCA Opportunities in a Post-Pandemic World



Key features of the report:

- An in-depth exploration of the **CHC Cough, Cold & Allergy** market globally, including **Cough remedies, Systemic cold & flu, Allergy remedies, Decongestants, Sore throat remedies** and more
- **Immunity-related VMS** – including vitamin C, zinc and immune supplements – also investigated
- **Coverage of 14 major markets** from around the world, with topline sales, brand performances, latest developments, launches and promotional campaigns
- Very latest **year-end 2024 sales** from the just-published **DB6**, our dedicated CHC sales database, plus historical growth rates back to 2020
- **Internet & mail order channel sales** for every market profiled
- Coverage of **marketer activity**, highlighting strategies and success factors, sales, NPD activity and consumer & HCP promotion
- A look to the future includes long-term **forecast sales** for all categories and countries to 2029 & 2034, plus the most up-to-date short-term forecasts (to 2025 & 2026)

Cough, Cold & Allergy was the slowest-growing CHC category globally in 2024, as systemic cold & flu and cough remedies progressed at a modest rate, but the outlook is steady, with growth trends returning to a more normal level. While demand for many products is dependent on incidence and severity of seasonal pathologies, marketers are identifying new niches to drive year-round sales such as high levels of air pollution. As restrictions continue on various ingredients, the trend towards “naturals” has fuelled NPD activity, but consumers are also demanding multi-symptom, fast-acting or “all-in-one” products. Allergy remedies look set for better growth, as switch activity remains a robust influencer of growth and innovation in the future. As demand for immunity-related products cools (among cough & cold brands and supplements), marketers may need to find new niches.

Our CCA report investigates pressing issues affecting the global CCA market, digging into multiple areas of interest and highlighting inherent opportunities. Examining ten core markets in detail (and additional key markets in brief), analysing brand performances and launch activity, our **CCA** report investigates the untapped potential in this CHC category.

The report features the latest end-2024 sales data from our dedicated **DB6** database, including topline historical sales globally, by country and category, as well as individual brand performances, and long-term forecasts to 2029 and 2034. Coverage extends to the online channel, with **internet & mail order sales** of CCA included in the topline and a dedicated section in each country profile.

Diving into the factors affecting individual Cough, Cold & Allergy markets, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, this report sheds light on trends & developments across **10 in-depth country profiles** with insights and predictions, as well as **shorter profiles of other key markets**.



Categories covered in this report include:

- Cough remedies • Systemic cold & flu • Systemic decongestants
- Topical decongestants • Chest rubs & inhalants
- Sore throat remedies & medicated confectionery • Allergy remedies
- Asthma remedies¹ • Immunity-related supplements²

¹ selected markets only

² sales tracked under VMS in **DB6** (vitamin C, zinc, immune supplements)

Assessing the short-term outlook, this report includes **full year 2025 & 2026 forecasts for all categories** in each market profiled.

With launch activity in CCA picking up again after several years of decline, has the impetus shifted from quantity to quality? **New product development** is explored across markets, including Rx-to-OTC switches, delivery format innovations, new benefits and more.

Key questions investigated in this report

How do key growth drivers, consumer choices and competitive landscape differ from market to market?

Which marketers and brands have proved most successful?

Has NPD benefited the CCA market and can it be a future growth driver?

What are the opportunities for e-commerce and digital marketing for CCA brands?

Can new niches and underserved demographics be identified?

How is the adjacent category of immunity-related supplements faring?

What is the outlook for CCA and where can opportunities be found?

10 individual markets profiled in depth



Brazil



China



France



Germany



India



Italy



Japan



Poland



UK



USA

Plus additional markets in brief



Australia



Canada



Mexico



Russia

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Brazil | Systemic cold & flu remedies

- Hyera also invests in high-profile family-themed event sponsorships to reinforce its brand association with family
- July 2023 saw brand participate in the Família no Parque event and subsequently the Rock in Rio Festival in September 2024



Germany | Topical decongestants

Germany topical decongestant sales 2024 (MSP, \$mn)




Year	2020	2021	2022	2023	2024
Sales (\$mn)	371.9	374.3	225.8	246.3	239.4
% Change	-	+1%	-39%	+9%	-3%


CAAGR 2020-24: +0.6%

Key trends & developments

- Xylometazoline nasal spray remains dominant (Top 5 brands) but strong generic penetration dampens value growth; nasal sprays & drops remain most popular format, with balms, ointments and gels more niche
- No topical expansion via Rx to OTC switch recently, with suggested switch of xylometazoline + 1-glycyrrhizin bismaleate combinations for intranasal application rejected in 2022
- NPD indicated extensions of two brands with hypertonic saline options, claiming to be gentler, and Germany's first nasal spray formulated with N-acetylcysteine
- Xylometazoline-based options dominate the pipeline. led by **Rhinopharm Nasen** which bounced back in 2024 from temporary supply issues at end-2023; stabiliser **NasenDuo** (with added decongestant) relaunched with updated packaging in February 2025
- Trade and digital ads for **Nasic neo** on the New version (with added decongestant and hyaluronic acid, \$1.8mn, -16%) and promoted it as "Effective from the first spray", although the core presentation (52.2Lmn, -9%) still accounts for the bulk of sales; promotion high-lights that the brand is made in Germany, and actively backs the nose to heal
- Nasic extended with Saline Duo (hypertonic saline solution, decongestant, medical device) in April 2025, positioned as a gentler means of relieving nasal congestion and promoting moisture in the nasal mucosa
- Generic **Nasen AL** offers a low-price alternative to the main xylometazoline brands
- Olyeth** is backed by digital ads that highlight its action to unblock the nose within 2 minutes and for up to 12 hours in the family therapy




India | Immunity-related VMS



- Lower bid **Zandu Chyawanprash** (Emami Group, \$25mn, -6.4%) has similar "2a immunity" claims and year-round use recommendations as Dabur's
- It also benefits from a significant online presence via online store sanatana.com

USA | Internet & mail order channel

USA internet & mail order CEA sales 2020-24 (MSP, \$mn)



Year	2020	2021	2022	2023	2024
Sales (\$mn)	694.0	880.7	1,182.0	1,360.3	1,615.3
% Change	-	+26.1%	+23.0%	+13.1%	+18.7%

CAAGR 2020-24: +20.8%

Key trends & developments

- E-commerce sales more dynamic than store sales 2020-24
- However, survey conducted by YouGov in 2024 shows that a significant share of respondents (88%) prefer to buy medicines traditionally way by going in person to pharmacies

USA leading CEA brands via internet & mail order channel 2024 (MSP, \$mn)

Brand	2024	% Change
1. Vicks (P&G)	387.5	+4%
2. Mucinex (Novartis)	87.2	+9%
3. Zyrtec (Novartis)	73.9	+25%
4. Primatene (Astronutric/Amplicat)	64.0	+51%
5. Flonase (Allergan)	45.6	+4%
6. Bonin (Boehringer)	45.1	+34%
7. Claritin (Bayer)	42.4	+3%
8. Allegra (Zephia)	39.4	+16%
9. Benadryl (Novartis)	28.4	+23%
10. Robitussin (Novartis)	26.4	+14%

Private labels: 246.5 (+17%), 124%

Others: 72.7 (+22%), 26%

India leading chyawanprash brands 2024 (MSP, \$mn)

Brand	2023	% Change
1. Dabur Chyawanprash (Dabur)	250.8	+2%
2. Baidyanath Chyawanprash (Baidyanath)	41.4	-1%
3. Zandu Chyawanprash (Emami Group)	28.3	+2%
4. Sona Chandi Chyawanprash (Emami Group)	15.2	+10%