

Cough, Cold & Allergy Report

Exploring the Current & Future Self-Care CCA Market



KEY FEATURES:

- An in-depth exploration of the issues affecting the **CCA** market, from consumer trends and regulatory changes to A+P campaigns and new product launch activity
- In-depth profiles of **10 major markets** (generating 70% of global sales between them) feature insights and predictions
- New product developments are explored across markets, including Rx-to-OTC switches, delivery format innovations, new benefits and more
- **Latest sales data** covers **12 months to mid-year 2020** from our dedicated **DB6** database, by region, country and category, and individual brand performances
- **Brand Case Studies** evaluate the key lessons to be learned from top brands, including consumer messaging, line extensions, portfolio development and brand strategies
- **Short-term forecasts** to 2020 & 2021 and **longer-term forecasts** to 2024 & 2029 for each market and category are included
- Selected category sales are **segmented by ingredient or format** in each country

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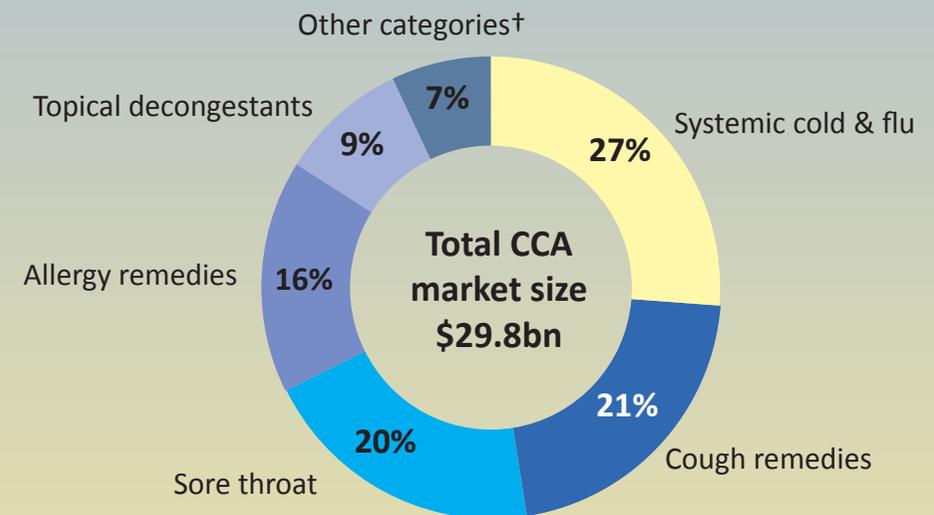
After exceptional Covid-driven growth in early 2020, global CCA sales recorded significant slowdown in Q2, with full year sales growth to end June 2020 just 3.7% (after a 7.8% rise in MAT Q1 2020). With global sales approaching \$30bn, the CCA market remains a sizeable area of investment for CHC players. But the largest categories Systemic cold & flu and Cough remedies are mature, fragmented and hampered by safety concerns. Allergy remedies expanded via Rx-to-OTC switches in recent years but their impact may have peaked.

So what is next for the CCA market? As social restrictions imposed during the pandemic plus increased hygiene measures and wearing of masks impact seasonal infections, the future of CCA is hard to predict. Will a second wave of lockdowns further dampen sales or spur renewed stockpiling of brands? Will marketers take advantage of the numerous opportunities for NPD, including switch, and growing popularity of natural remedies? This report investigates all the pressing issues surrounding CCA including growth trends, key developments and forecasts for the future.

Key questions investigated in this report

-  What are the key differences from market to market in terms of growth trends, regulations and competitive landscape?
-  Which marketers and brands stand out and what lessons can be learned?
-  How much has NPD benefited CCA and what is coming down the pipeline in the years ahead?
-  How have sales been affected by the Covid-19 pandemic?
-  What has been the impact of lockdown on cases of cold & flu and what are the implications for CHC medicines?
-  Which gaps in the market still exist and who is best placed to grab upcoming opportunities?

Global CCA sales by category mid-2020



† comprises Systemic decongestants (4%), Chest rubs & inhalants (3%), Asthma remedies (1%)

10 individual markets covered



*All country profiles include topline sales, with coverage of brand performances, new developments, launches and promotional campaigns

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†

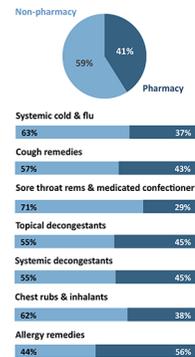
†selected markets only

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UK – CCA Overview

Ingredient	Status	Additional notes
acetylcysteine	Rx	OTC for children aged 6+ years
ambroxol	--	
beclometasone	M	
benzocaine	M	Max strength for sore throat 3mg
budesonide	P	Max daily dose 200mcg per nostril
carbocisteine	Rx	
cetirizine	M	Mass market up to 30 tablet packs
chlorphenamine	P	
dextromethorphan	P	Max daily dose 75mg
desloratadine	Rx	
diphenhydramine	P	
feoxetine	Rx	
flurbiprofen	P	Max dose 8.75mg
fluticasone	M	Max pack size 60 sprays
levocetirizine	Rx	
mometasone	P	Max daily dose 200mcg per nostril
naphazoline	P	
pseudoephedrine	P	OTC in packs up to 720mg

UK CCA sales by pharmacy / non-pharmacy channel 2019 (MSP, \$mm)



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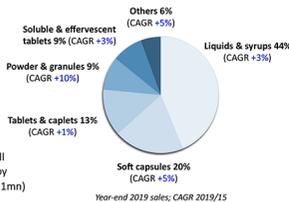
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USA – Systemic cold & flu

- July 2020 also saw launch of Vicks Children's Botanicals supplements, positioned for cold & flu, capitalising on trend towards natural remedies
- Versions include Multi Care (marshmallow root, ivy leaf, elderberry) and Multi Care Night (with added chamomile), plus a combination pack
- Range is claimed to soothe cough, clear mucus and relieve irritation for infants and children aged 1+ year



USA systemic cold & flu sales by format 2019 (MSP, \$mm)



- Mucinex cold & flu range grew well in the year to mid-2020, boosted by launch of Mucinex Nightshift (\$14.1mm) in summer 2019

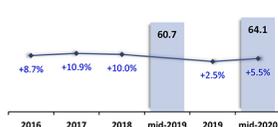
- Nightshift targets younger, busy consumers and was backed via a partnership with actor Jason Biggs, who stated at the launch event in New York City that it helps to relieve his cold symptoms at night so he can feel "human" enough during the day to look after his young children – "because the kids don't care if I'm sick"

- Core Fast-Max line (\$150.0mm, +6%) was extended with Maximum Strength Fast-Max All-in-One Cold & Flu sub-range in July 2018, positioned as a comprehensive cold & flu remedy claimed to temporarily relieve symptoms including nasal congestion, fever, headache, cough, sore throat, nasal congestion, sinus pressure and body pain

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India – Allergy remedies

India allergy remedies sales mid-2019 & mid-2020 (MSP, \$mm)



Topline trends: Allergy remedies

- Allergy remedies growth is relatively low, with low-cost brands benefiting from reduced consumer purchasing power owing to historical economic challenges and Covid-19 pandemic in 2020
- While fexofenadine accounts for majority of CHC sales, ingredient is a "deemed OTC" and leading brand Allegra is officially Rx
- Low-cost levocetirizine brands in the mid tier performed well 2016-19, while some opportunities exist within bilastine segment

- Although Allegra's "deemed OTC" status means it cannot be advertised to consumers, marketer Sanofi has invested in consumer education to raise awareness of causes of allergies via allergyfree.co.in website (see right)

- While site does not contain brand promotion and recommends use of a wide range of antihistamines for allergy management, it uses a similar colour scheme to packaging for Allegra

- A lack of fexofenadine competition has allowed Allegra to retain a commanding share, and it was extended into nasal sprays segment via launch of fluticasone-based Allegra Nasal in 2019



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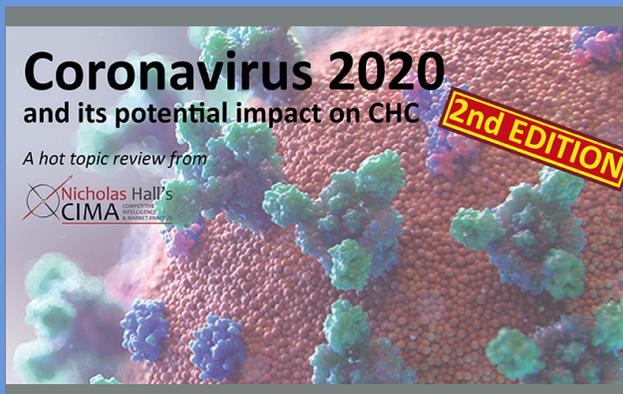


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A hot topic review from

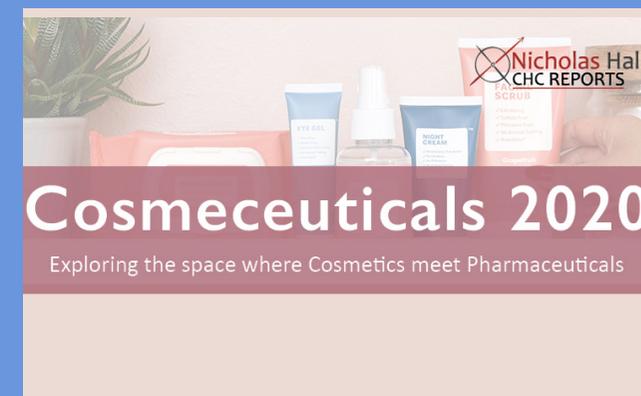
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