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

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

Global CCA sales by category mid-2020

Total CCA market size $29.8bn

- Systemic cold & flu: 27%
- Cough remedies: 21%
- Allergy remedies: 16%
- Sore throat: 20%
- Topical decongestants: 7%
- Other categories: 9%

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

10 individual markets covered

- Brazil
- China
- France
- Germany
- India
- Italy
- Japan
- Russia
- UK
- USA

*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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