

Contents

CHC Market Definition	VIII
1. Global Review	1
World Overview	1
Competitive Landscape	3
Switch	5
Brands & Innovation	6
Retailing	7
Outlook	8
2. Regional Review	12
North America	12
East & South East Asia	14
Western Europe	16
Central & Eastern Europe	18
Latin America	20
Japan	22
Indian Subcontinent	24
Australasia	26
3. Leading Markets	29
USA	30
China	32
Japan	34
Germany	36
India	38
Italy	40
Russia	42
France	44
Brazil	46
UK	48
Poland	50

Mexico	52
Canada	54
Australia	56
Indonesia	58
4. Category Review	60
Analgesics	60
Cough, cold & allergy	63
Gastrointestinals	66
Vitamins, minerals & supplements	69
Dermatologicals	72
Lifestyle CHC	75
5. Leading Companies	78
Haleon	82
Kenvue	83
Bayer	84
Opella	85
P&G	86
Reckitt	87
China Resources 999	88
Taisho	89
Otsuka	90
Bausch Health	91
Abbott	92
Unilever	93
Nestlé	94
Prestige Consumer Healthcare	95
Stada	96
Teva	97
Church & Dwight	98
Perrigo	99
Cooper Consumer Health	100
Alcon	101

6. Mergers & Acquisitions	102
7. Leading Brands	126
Vicks	134
Tylenol	135
Nature Made	136
Advil	137
Mucinex	138
Voltaren	139
Centrum	140
999 Gan Mao Ling	142
Panadol	142
Halls	143
Nicorette	144
Dong-e E-Jiao	145
Nurofen	146
Zyrtec	147
Fupai E-Jiao	147
Claritin	148
Strepsils	149
Doliprane	149
Caltrate	150
Olly	151
Allegra	152
Nature's Bounty	153
Systane	153
Bayer Aspirin	154
Electrolit	155
8. Hot Topics	157
GLP-1 usage offers numerous opportunities for CHC players	157
Advice and community-building increasingly key in women's health	158
Trend for health through digestion driving innovation in probiotics	160
Rush of innovation expands cognitive health segment	162

9. Rx-to-OTC Switch	164
Overview	164
Western Europe	164
North America	168
Japan	170
Australasia	173
Emerging markets	175
The Big Switches	193
Allegra	194
Alli, Xenical	194
Astepro	195
Differin	195
Dymista	196
ellaOne	196
Flonase / Flixonase	197
Formigran	198
Hana, Lovima	199
Loxonin S	200
Maloff Protect	201
MiraLAX	201
Narcan	202
Nasacort	202
Nexium 24HR	203
Opill	204
Pataday	204
Plan B, NorLevo, Postinor, Levonelle	205
Prevacid 24HR	206
Silvasta, MaxOn Active / Tadalafil MaxOn, Viagra Connect, Cialis	206
Voltaren	208
Xyzal	208
Zyrtec	208

10. New Product Development & Innovation	209
Analgesics	209
Cough, Cold & Allergy	210
Gastrointestinals	211
Vitamins, Minerals & Supplements	212
Dermatologicals	214
Lifestyle CHC	215
11. Global Retailing	218
12. Company Ownership	237
13. Brands & Marketers	248
14. Manufacturers' Associations	286
15. Glossary	293

Charts

Chart 1: Global CHC sales by region 2024	1
Chart 2: Global CHC sales by category 2024	2
Chart 3: Global CHC forecasts by region	8
Chart 4: Global CHC forecasts by category	9
Chart 5: North America CHC market by category 2024	12
Chart 6: North America leading CHC marketers & brands 2024	13
Chart 7: E&SE Asia CHC market by category 2024	14
Chart 8: E&SE Asia leading CHC marketers & brands 2024	15
Chart 9: Western Europe CHC market by category 2024	16
Chart 10: Western Europe leading CHC marketers & brands 2024	17
Chart 11: C&E Europe CHC market by category 2024	18
Chart 12: C&E Europe leading CHC marketers & brands 2024	19
Chart 13: Latin America CHC market by category 2024	20

Chart 14: Latin America leading CHC marketers & brands 2024	21
Chart 15: Japan CHC market by category 2024	22
Chart 16: Japan leading CHC marketers & brands 2024	23
Chart 17: Indian Subcontinent CHC market by category 2024	24
Chart 18: Indian Subcontinent leading CHC marketers & brands 2024	25
Chart 19: Australasia CHC market by category 2024	26
Chart 20: Australasia leading CHC marketers & brands 2024	27
Chart 21: Global leading 15 CHC markets 2024	29
Chart 22: USA CHC market by category 2024	30
Chart 23: USA leading CHC marketers & brands 2024	30
Chart 24: China CHC market by category 2024	32
Chart 25: China leading CHC marketers & brands 2024	32
Chart 26: Japan CHC market by category 2024	34
Chart 27: Japan leading CHC marketers & brands 2024	34
Chart 28: Germany CHC market by category 2024	36
Chart 29: Germany leading CHC marketers & brands 2024	36
Chart 30: India CHC market by category 2024	38
Chart 31: India leading CHC marketers & brands 2024	38
Chart 32: Italy CHC market by category 2024	40
Chart 33: Italy leading CHC marketers & brands 2024	40
Chart 34: Russia CHC market by category 2024	42
Chart 35: Russia leading CHC marketers & brands 2024	42
Chart 36: France CHC market by category 2024	44
Chart 37: France leading CHC marketers & brands 2024	44
Chart 38: Brazil CHC market by category 2024	46
Chart 39: Brazil leading CHC marketers & brands 2024	46
Chart 40: UK CHC market by category 2024	48
Chart 41: UK leading CHC marketers & brands 2024	48
Chart 42: Poland CHC market by category 2024	50
Chart 43: Poland leading CHC marketers & brands 2024	50

Chart 44: Mexico CHC market by category 2024	52
Chart 45: Mexico leading CHC marketers & brands 2024	52
Chart 46: Canada CHC market by category 2024	54
Chart 47: Canada leading CHC marketers & brands 2024	54
Chart 48: Australia CHC market by category 2024	56
Chart 49: Australia leading CHC marketers & brands 2024	56
Chart 50: Indonesia CHC market by category 2024	58
Chart 51: Indonesia leading CHC marketers & brands 2024	58
Chart 52: Global CHC analgesics category split 2024	60
Chart 53: Leading analgesic brands 2024	61
Chart 54: Global CHC CCA category split 2024	63
Chart 55: Leading CCA brands 2024	64
Chart 56: Global CHC GIs category split 2024	66
Chart 57: Leading GI brands 2024	67
Chart 58: Global CHC VMS category split 2024	69
Chart 59: Leading VMS brands 2024	70
Chart 60: Global CHC dermatologicals category split 2024	72
Chart 61: Leading dermatological brands 2024	73
Chart 62: Global lifestyle CHC category split 2024	75
Chart 63: Leading lifestyle CHC brands 2024	76
Chart 64: Top 250 CHC marketers 2024	78
Chart 65: CHC merger, acquisition, alliance & joint-venture activity 2020-2025	102
Chart 66: Multiples paid for CHC acquisitions 2020-2024	125
Chart 67: Leading CHC brands 2024	126
Chart 68: Legal status of ingredients in selected world markets	181
Chart 69: Legal status of ingredients in selected European markets (I)	185
Chart 70: Legal status of ingredients in selected European markets (II)	189
Chart 71: Big Switches global CHC sales 2024	193
Chart 72: Company Ownership Index	237
Chart 73: Brands & Marketers Index	248