



1st Edition

# OTC Indies:

## U.S. Analysis of Independent OTC Companies

Published May 2019

Base Year: 2018

Regional Coverage: United States

With the recent low growth of traditional OTCs, many large market players will seek growth via acquisition of complementary companies and/or brands. This study offers in-depth profiles of approximately 70 independent OTC companies, many of which have recently recorded double-digit sales growth. These companies often outpace market growth by offering unique brands, unique and often natural ingredients, focused distribution, and a strong online presence, frequently combined with compelling digital marketing that resonates with today's OTC consumers. This report identifies these market disruptors and assesses the factors that make them resonate with consumers and retailers.

### This Report Helps Subscribers to:

- Identify companies or brands that could be acquisition opportunities
- Understand which independent OTC brand innovations have been successful and why
- Assess marketing strategies used by these OTC brands to differentiate themselves
- Cast a wide net analysis to uncover potential licensing or acquisition opportunities
- Gain a source of valuable competitive information and insights
- Learn which product categories these brands are dominant in and where the opportunities lie
- Analyze compelling digital marketing successfully used by smaller companies and brands



# Report Contents

## Introduction

### Executive Summary

- Key market trends and drivers
- Indie companies ranked by sales
- Indie companies ranked by sales growth
- Companies and brands to watch
- Outlook

## Company Profiles

Profiles of approximately 70 OTC companies (see Table 1), with each including the following:

- Company overview
- Corporate sales and profits (or sales estimates if privately held)
- OTC brand portfolio
- Recent new product launches
- Recent developments including acquisitions/divestitures/licensing agreements
- Marketing activity with a focus on digital strategy
- Retail distribution including online, and expansion strategies
- Brand sales for 2017 and 2018
- Sales forecasts through 2023

**Table 1: Companies Profiled**

21st Century HealthCare	Foundation Consumer Healthcare	Merix Pharmaceutical Corp.	Rohto
Advantice Health	Gaia Herbs	MicroBiome Therapeutics	Schwabe
Akorn	Genomma Laboratories	NeilMed	Sea-Band
Alva-Amco	Genexa	New Nordic	Smartypants
Avrio Health	Health-Ade Kombucha	Next Foods	Suja Life
Balassa Laboratories	Hisamitsu	NFI Consumer Products	Summers Laboratories
Biocodex	IM Health	Nordic Naturals	Synergy Consumer Healthcare
BioGaia	Infirst	Now Foods	Swisse Wellness
Biogix	Irwin Naturals	Nutramax	The Honest Company
BF Ascher	Jarrow Formulas	Olly	Troy Healthcare
Biotab Nutraceuticals	Kobayashi Healthcare	Performance Health	Wakanuga
Blistex	Konsyl Pharmaceuticals	Pharmacare	Wellements
California Baby	Kramer Laboratories	Piping Rock Health Products	Welmedix
Carma Labs	Lifeway Foods	Prince of Peace	Wellspring Pharmaceuticals
Clarion Brands	Lifewear Technologies	Quincy Biosciences	Xlear
DSE Healthcare	MainPointe	Randob Labs	Zanfel Laboratories
Focus Consumer Healthcare	Maty's Health Products	Revive Personal Products	



## Scope

**OTC Indies: U.S. Analysis of Independent OTC Companies** is an appraisal of about 70 independent OTC companies that have disrupted categories and grown at rates greater than the industry average.

- Geographic scope of the research is the United States
- Includes coverage of major OTC and nutritional supplements categories as shown in Table 2
- Both OTC monograph and natural OTC products are included
- Channel scope includes all consumer outlets where OTCs are sold, including mass merchandisers, drug stores, food and grocery stores, online, warehouse clubs, convenience stores, natural and specialty stores, health food stores, vitamin and supplement stores, discount and dollar stores, and other outlets

**Table 2: Categories included in Scope**

Digestive products	Internal analgesics	Topical products	Upper respiratory products
Antacids and anti-gas products	General pain relievers	Anti-itch products	Allergy and asthma relief products
Antidiarrheal preparations	Other internal analgesics	Corn, callus, and wart removers	Cold and sinus medications
Antinausea medications	<b>Nutritional products</b>	Diaper rash products	Cough/cold/immunity support
Digestive enzymes	Brain health supplements	Eye care products	Cough drops and sore throat lozenges
Laxatives	Energy, mood and stress support	First aid products	Cough syrups
Prebiotics	Herbal products	Fungicidal preparations	Nasal and topical decongestants
Probiotics	Heart health supplements	Oral care products	<b>Other products</b>
	Vitamins and minerals	Topical analgesics	Sleeping aids

## Key Benefits

This report provides insights and information on the most compelling independent OTC companies and brands that are helping to shape the OTC market. While some of these brands and companies are small in terms of sales volume now, they have resonated with consumers and are poised for growth. This report provides:

- A wide net analysis of independent OTC brands and companies to uncover acquisition opportunities
- Highlights on the brands and concepts that are resonating with today’s OTC consumer
- A focus on the role of digital marketing and how it is driving sales growth for indie brands
- Valuable competitive insights and information
- Analysis of the role that retail channels play in reaching OTC consumers



## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research



#### We Know Who to Talk to. We Know How to Listen.

A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- OTC marketers and manufacturers
- Retailers
- Consumer and trade organizations
- Regulatory agencies
- Financial analysts

### Secondary Research



#### We Know Where to Look – Mining the Details.

Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence



#### We Know How to Verify.

Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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