

12th Edition

Rx-to-OTC Switch Forecasts USA: Next Frontier

Published August 2017

Base Year: 2017

Forecasts to 2022

Regional Coverage: United States

This report provides subscribers with a comprehensive, objective assessment of the Rx-to-OTC switch landscape including forecasts of future switches in the United States. This report provides forecasts of switches in existing OTC categories and projections for new OTC categories. The study provides a broad assessment of “switchable” OTC categories, a specific analysis and forecasts of most likely switch categories and drugs, and an analysis of regulatory and retail paradigm shifts and implications for future switches.

This Report Helps Subscribers to:

- Assess Rx-to-OTC switch forecasts by category
- Analyze regulatory and retail paradigm shifts and implications for future switches
- Cast a wide-net analysis for uncovering potential licensing opportunities
- Specific analysis and forecasts of the most likely switch drugs/categories



Report Contents

Introduction

Executive Summary

- Overview of key findings and trends
- Regulatory considerations for switches
- Recent switches
- Switch forecasts
- Competitive landscape
- Conclusion and appraisal

Switch Forecasts by Category

For each of the categories shown in Table 1, the following information is provided:

- Comparative analysis of Rx and OTC markets (where applicable)
- Regulatory considerations
- Safety/efficacy
- Patent status
- Potential nonprescription drugs claims
- Likelihood of switch and expected timing
- OTC sales forecasts
- Expected competitive response from both branded and private-label products

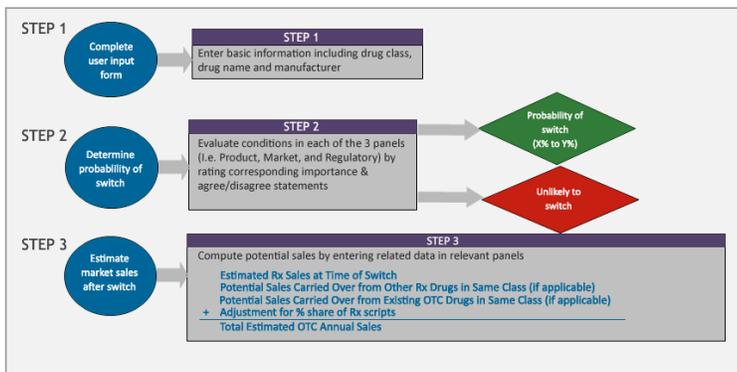
FutureView Forecasting Model

This report includes access to Kline’s proprietary and interactive FutureView forecasting model, which is an Excel-based model accessed online. The model provides Kline’s assumptions about the probability of switch and sales forecasts by brand and therapeutic class. The assumptions in the model can be changed by users to revise sales forecasts or probabilities for classes/drugs included in this analysis or for other classes/drugs not profiled.

Table 1: List of Categories Analyzed

| |
|------------------------------|
| Acne |
| Allergy |
| Benign prostatic hyperplasia |
| Digestive products |
| Erectile dysfunction |
| Migraine |
| Overactive bladder |
| Sleeping aids |
| Skin rash/eczema psoriasis |
| Topical pain relievers |

Kline’s FutureView Forecasting Model





Scope

Rx-to-OTC Switch Forecasts USA: Next Frontier represents the 12th edition in Kline's venerable series of reports on Rx-to-OTC switches. With this study, we uncover opportunities for future switches in the U.S. market. This study attempts to understand how shifts in regulations, retail environment, and technology may have significant impacts on future switches. This report covers the U.S. market for Rx-to-OTC switches and provide sales forecasts through 2022. Full subscribers to this report are entitled to access to Kline's proprietary FutureView Forecasting Model, which helps predict the likelihood of switches, as well as sales forecasts for switch brands and categories.

Key Benefits

For consumer health marketers, Rx-to-OTC Switch Forecasts USA: Next Frontier examines the key issues and implications that switches can have on existing OTC businesses and identify opportunities for future growth from switches. Accurately predicting Rx-to-OTC switches and assessing their impact is crucial for maximizing business opportunities, minimizing threats, and successfully constructing long-term strategic plans. Specifically, the report provides subscribers with the following key deliverables:

- Up-to-date primary research on switches conducted with knowledgeable industry participants
- Casts a wide-net analysis to uncover potential licensing opportunities
- Realistic assessment of regulatory climate and future implications
- An understanding of implications of future switches on existing OTC categories
- Identification of future opportunities by identifying categories with high likelihood of switch, and forecasting sales potential and likely timing



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 50-plus 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:

- Prescription drug executives
- OTC drug executives
- Regulators
- Retailers
- Pharmacists
- Patent attorneys
- Industry consultants
- Trade associations

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 over 50 years.

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