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# Nonprescription Drugs USA

Data Released March 2018  
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Base Year: 2017

## Regional Coverage: United States

A comprehensive analysis of the U.S. nonprescription drugs industry, focusing on key trends, developments, challenges, business opportunities, and new product activity, and offers insights and information on the following:

- Industry trends
- Market size and performance
- Brand sales and share
- Company sales and share
- New product activity
- Retail distribution
- Regulatory developments
- Rx-to-OTC switch forecasts
- Five-year historical sales
- Five-year sales forecasts

Features user-friendly database that is fully searchable and exportable that contains sales data, growth, share, and forecasts for hundreds of brands and companies across more than 20 categories. Through its alliance with IRI, Kline now includes as part this report analysis of IRI MULO data for year ending 2017.





# Report Contents

## Introduction

### Executive Summary

An executive briefing covering developments in 2017, the impact of key trends and issues in the nonprescription drug business, and their future implications for industry participants. Includes analysis of retail distribution, private-label activity, and five-year forecasts through 2022.

### Products

Pertinent information plus insightful analysis of 22 major categories, including key trends and developments; manufacturers' sales for 2016 and 2017, sales and market shares for leading brands, new product activity, sales by retail channel, private-label sales, marketing activity, and outlook to 2022. The product categories covered are shown in Table 1.

### Major Companies

Profiles of 11 major companies, including company activities; sales by product category and major brands in 2016 and 2017; recent developments including acquisitions, divestitures, and new products; corporate overview; and an outlook to 2022. The major companies covered are shown in Table 2.

Table 1: Product Categories			Table 2: Major Companies
<b>Digestive Products</b> <ul style="list-style-type: none"> <li>Antacids and antigas</li> <li>Antidiarrheal preparations</li> <li>Antinausea preparations</li> <li>Laxatives</li> </ul>	<b>Nutritional Products</b> <ul style="list-style-type: none"> <li>Herbal products</li> <li>Vitamins and minerals</li> </ul>	<b>Upper Respiratory Products</b> <ul style="list-style-type: none"> <li>Allergy and asthma relief products</li> <li>Cold and sinus medications</li> <li>Cough drops and sore throat remedies</li> <li>Cough syrups</li> <li>Nasal and topical decongestants</li> </ul>	Bayer Group Carlyle Group Church & Dwight GlaxoSmithKline Johnson & Johnson Perrigo Company Pfizer Prestige Brands Procter & Gamble Reckitt Benckiser Sanofi
<b>Internal Analgesics</b> <ul style="list-style-type: none"> <li>General pain relievers</li> <li>Other internal analgesics</li> </ul>	<b>Topical Products</b> <ul style="list-style-type: none"> <li>Anti-itch products</li> <li>Corn, callus, and wart removers</li> <li>Diaper rash products</li> <li>Eye care products</li> <li>First aid products</li> <li>Fungicidal preparations</li> <li>Oral care products</li> <li>Topical analgesics</li> </ul>	<b>Other Products</b> <ul style="list-style-type: none"> <li>Sleeping aids</li> </ul>	





## Scope

Nonprescription Drugs USA is an extensive industry resource used widely by marketing executives and other industry participants for competitive analysis, market investigation for new products, acquisition screening, and business planning. This report focuses solely on nonprescription drugs sold through domestic consumer outlets, including those marketed via drug stores, food stores, and mass merchandisers, in addition to nontraditional outlets such as health food stores, convenience stores, warehouse clubs, dollar stores, mail order, and online. Market data refer exclusively to sales through these outlets. Direct and mail order sales are included, but sales to institutions such as hospitals and nursing homes and exports are excluded.

For more than 50 years, the study has proven to be the most authoritative and comprehensive annual source of information on the nonprescription drug industry. It contains industry trends and market size data for 22 product categories. In addition, market share and brand sales information are reported. The study profiles 11 leading major companies. Included in the report is an analysis of regulatory developments, retail distribution, and private-label products.

## Key Benefits

Subscribers to Nonprescription Drugs USA are afforded the following benefits:

- Access to the most comprehensive and authoritative independent source of information and insights on the U.S. nonprescription drugs industry
- Access to accurate sales data through all outlets based on primary research with knowledgeable industry participants
- One day of consultation time to be used within 6 months of report publication
- A tool to learn about categories or brands that could be potential new entry/acquisition opportunities
- Access to periodic podcasts on timely topics from Kline's industry experts
- A source of valuable competitive information and intelligence
- Understand industry trends that may impact your categories and/or brands
- Learn about expected future Rx-to-OTC switches and their expected impacts on existing OTC categories
- Depth of knowledge with historical sales and trend information, as well as five-year sales forecasts
- Assessment of new product activity in each category
- Access to Kline's searchable, exportable database with rolling six years of sales data on hundreds of brands and companies across 22 categories



## 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.

- Marketers/manufacturers
- Government agencies
- Retailers
- Trade organizations

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:

### 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. Through its alliance with IRI, Kline now includes as part of this report analysis of IRI MULO data for year ending 2017

and other secondary sources. 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 procurement and assessment, 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.

#### A FULL SPECTRUM OF SERVICES



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