

Rx-to-OTC Switch Forecasts: Market Analysis and Opportunities

Base year: 2019

**Forecasts through
2024**

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13th edition

Regional Coverage: United States

This report provides a comprehensive, objective assessment of the Rx-to-OTC switch landscape including forecasts of switches in the United States 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 for the most-likely switch categories and drugs, and an analysis of regulatory and retail paradigm shifts and implications for future switches.

SCOPE

- › Allergy
- › Benign prostatic hyperplasia (BPH)
- › Cholesterol
- › Erectile dysfunction
- › Influenza
- › Migraine
- › Narcotic overdose antidote
- › Oral contraceptives
- › Overactive bladder medications (OAB)
- › Sleeping aids
- › Smoking cessation
- › Topical analgesics

**Featuring Kline’s FutureView
Switch Forecasting Model**

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Introduction

Executive Summary

This section of the report provides:

- 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 category listed in Table 1, the following analysis 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

Full subscribers have access to Kline's proprietary, 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 provided.

Table 1: CATEGORIES ANALYZED

Allergy
Benign prostatic hyperplasia
Cholesterol
Erectile dysfunction
Influenza
Migraine
Narcotic overdose antidote
Oral contraceptives
Overactive bladder
Sleeping aids
Smoking cessation
Topical analgesics

REPORT BENEFITS

This report examines key issues and implications that switches can have on existing OTC businesses and identifies opportunities for future growth from switches. Assessing the impact of switches is crucial to maximize opportunities, minimize threats, and form successful long-term strategic plans.

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 for switch in categories with high likelihood of switch, and forecasts of 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 60-plus years in the business and leveraging our worldwide network of offices, our team of seasoned professionals draws upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

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