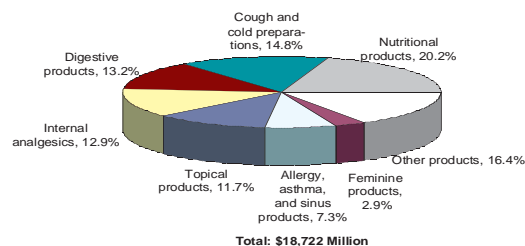


Nonprescription Drugs USA 2009

Fact Sheet

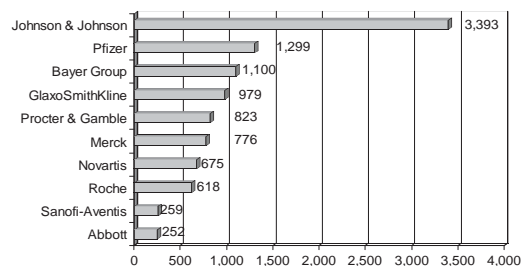
The market

The total U.S. market for OTC drugs is \$18.7 billion in 2009, posting a 2.2% growth over sales of \$18.3 billion in 2008. Nutritional products continues to be the largest class of OTC drugs with a 20.2% share followed by other products which include home diagnostic test kits, smoking cessation aids, weight loss products, and sleeping aids, with a 16.4% share of the market in 2009.



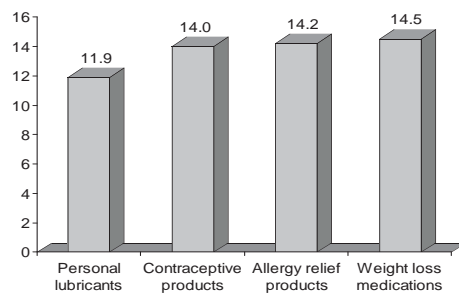
Companies

Johnson & Johnson continues to be the far and away branded leader with sales of \$3.4 billion for a 18.1% market share while Pfizer ranks second with sales of \$1.3 billion and a 9.5% market share. By comparison total sales attributed to private-label OTC manufacturers are \$4.2 billion, and at 22.5% market share these are the most formidable competitor. The competitive landscape has changed and consolidated in 2009. Pfizer has acquired Wyeth, Merck has acquired Schering-Plough and Sanofi-Aventis is in the process of acquiring Chatten.



Fastest growing categories

There are several categories in the industry that posted mid-double digit gains in 2009, despite the economic recession. Most of the fastest growing categories were propelled by Rx-to-OTC switch brands in 2009, namely Alli in the weight loss category, Zyrtec in the allergy relief products, and Plan B in the contraceptive products market. The K-Y franchise continues to expand the personal lubricants market.



Fastest growing companies

Reckitt Benckiser was the fastest growing company in 2009 posting an 8.7% increase in sales, followed by private-label OTCs which grew 8.5% and Teva Pharmaceuticals which posted 8.0% growth in 2009. Reckitt Benckiser's growth continues to be driven by its Mucinex and Delsym franchises in the cough and cold market. Teva only markets one OTC brand, Plan B which saw success from the Plan B One Step line extension in 2009.

