

Nonprescription Drugs USA 2010

Published Continually Since 1977

Data Released 1st Quarter 2011

Report Published June 2011

Base Year: 2010

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 36 categories.

Report 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.

For more than 40 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 36 product categories. In addition, market share and brand sales information is reported. The study also profiles 14 leading major companies. Included in the report is an analysis of regulatory developments, retail distribution, and private-label activity.

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
- Invitation to participate in Kline's annual web conference with access to Kline's analysts and an in-depth presentation about market performance and industry trends
- 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 sales data on hundreds of brands and companies across 36 categories

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

An executive briefing covering developments in 2010, the impact of key trends and issues in the nonprescription drug business, and their future implications for industry participants.

3. INDUSTRY ANALYSIS

A summary of industry developments in 2010 and a five-year forecast.

- The market 2010
- Companies
- Selling and distribution
- Private-label activity
- Outlook to 2015
- Kline's FutureView forecasting scenarios

4. THE PRODUCTS

Pertinent information plus insightful analysis of approximately 36 major categories, including category trends and developments; manufacturers' sales for 2009 and 2010, sales and market shares for leading brands, new product activity, sales by retail channel, private-label sales, promotional activity, and outlook to 2015. The product categories covered are shown in Table 1.

5. MAJOR COMPANIES

Profiles for 14 major companies, including company activities; sales by product category and major brands in 2009 and 2010; recent developments including acquisitions, divestitures, and new products; corporate overview; and an outlook to 2014. The major companies covered are shown in Table 2.

6. MINOR COMPANIES

Brief profiles of approximately 50 smaller marketers of non-prescription drugs, including corporate sales and profits; non-prescription drug sales, recent developments, including acquisitions, divestitures, and new product activity, product portfolios, and traceable media expenditures for 2010.

7. ADVERTISING

Traceable media expenditures with analysis for brands by product category and by major company.

Table 1: Product Categories Covered

Allergy, Asthma, and Sinus Products

- Allergy relief products
- Asthma medications
- Sinus medications

Cough and Cold Preparations

- Cold medications
- Cough drops and lozenges
- Cough syrups
- Nasal decongestants
- Sore throat remedies
- Topical vapor products

Digestive Products

- Antacids and antigas products
- Antidiarrheal preparations
- Antinausea preparations
- Laxatives

Feminine Products

- Contraceptive products
- Feminine deodorants and itching remedies
- Feminine yeast infection remedies
- Personal lubricants

Internal Analgesics

- Arthritis pain relievers
- General pain relievers
- Menstrual relief products

Nutritional Products

- Herbal products
- Vitamins and minerals

Topical Products

- Anti-itch products
- Corn, callus, and wart removers
- Diaper rash products
- Eye care products
- First aid products
- Fungicidal preparations
- Hair regrowth treatments
- Hemorrhoidal preparations
- Oral care products
- Topical analgesics

Other Products

- Home diagnostic test kits
- Sleeping aids
- Smoking cessation aids
- Weight loss medications

Table 2: Major Companies Covered



Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of accuracy. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted hundreds of in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including nonprescription drug manufacturers, retailers, suppliers, and industry associations. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research comprises the bulk of the overall research methodology for this report. In addition, this analysis is supplemented by dedicated, full-time rigorous searches of secondary research drawn from the review of company materials such as financial filings and press releases, regular searches of trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. 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.

Kline's research and consulting services extend across the entire healthcare industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Recently published or in-progress research for the Healthcare industry includes:

- U.S. OTC Competitor Cost Structures 2010
- OTC Innovations USA 1999-2009: Analysis of Factors for Success
- Rx-to-OTC Switch Forecasts 2010
- Impact of Recessions on the US OTC Market
- Personal Care: U.S. Competitor Cost Structures
- U.S. Retailers' Perceptions of OTC Drug Marketers
- Rx-to-OTC Switch Strategies USA
- U.S. Consumers' Perceptions of OTC Drugs
- Nonprescription Drugs Canada

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

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