

Rx-to-OTC-Switch Strategies USA

Newest Edition in Kline's Ongoing Rx-to-OTC Switch Series

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A comprehensive assessment of recent and imminent Rx-to-OTC switches and the likely impact on the OTC market, focusing on key changes, challenges, and business opportunities, and addressing such questions as:

- Which drug classes are most likely to generate Rx-to-OTC switches?
- Which drugs are likely to switch and why?
- What are the timing and forecast sales of these switches?
- What are the expected impacts on both OTC and Rx markets post-switches?
- What impact will a formal BTC class have on future switches?
- What strategies can OTC marketers take to defend their brands?

This report includes a timely assessment of potentially imminent Rx-to-OTC switches, including the status of cholesterol-lowering medications currently under FDA review.

Report Scope

After a recent lull, the number of Rx-to-OTC-switch brands entering the U.S. nonprescription drugs market has slowly increased, bringing to market Plan B, Prilosec OTC, Miralax, and Zador. Additional switches are expected over the next few years that are likely to have a significant impact.

Rx-to-OTC-Switch Strategies USA presents a detailed analysis of the recent and future Rx-to-OTC switches in the United States. The report identifies strategies for success, based on seven past switches. It also discusses the likelihood of future switches by profiling a total of 20 specific drugs in eight therapeutic classes and addressing switch issues common to each therapeutic class.

Key Benefits

For existing OTC brands, switches can erode sales and market positions. 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
- An objective perspective on future switches
- An understanding of the implications of future switches for existing OTC markets and brands
- Forecasts of major switches, including timing, brand sales, and both Rx and OTC market sales

Forecasts in this report will be generated with Kline's *FutureView Scenario Forecasting Model*. With the enhanced forecasts, subscribers can see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

This section of the report provides a summary of the likelihood of future switches, an examination of success factors for recent switches, and an overall appraisal of the likely impact on the OTC market from Rx-to-OTC switches. It rates the likelihood of Rx-to-OTC switches for 20 candidates as high, moderate, or low and offers forecasts for these switches and trends in future Rx-to-OTC switches.

3. BTC/THIRD CLASS OF DRUGS

This section provides a brief overview of the history of this issue and the trends that have led to the current situation. It assesses which switch candidates may be sold in a BTC class in the United States, reviews various stakeholders' positions and concerns about a BTC class, and analyzes the BTC class and recent switches from prescription to BTC status in the United Kingdom.

4. RECENT RX-TO-OTC SWITCHES

4A. Alaway

4B. Alli

4C. Miralax

4D. Mucinex

4E. Plan B

4F. Prilosec OTC

4G. Zaditor

5. POSSIBLE FUTURE RX-TO-OTC SWITCHES

5A. Allergy relief products

- Allegra
- Clarinex
- Zyrtec

5B. Digestives/proton pump inhibitors

- Aciphex
- Nexium
- Prevacid
- Protonix
- Zegerid

5C. Erectile dysfunction medications

- Cialis
- Viagra

5D. Incontinence medications

- Detrol
- Ditropan

5E. Migraine medications

- Imitrex

5F. Sleeping aids

- Ambien
- Lunesta
- Rozerem

5G. Smoking cessation aids

- Zyban

5H. Statins

- Lipitor
- Mevacor
- Pravachol

Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. 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. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including OTC manufacturers and marketers, regulators, key retailers, managed care organizations, industry trade groups, and other direct stakeholders/influencers.

Primary research represents 85% of the overall research methodology for this report. The analysis is supplemented by secondary research drawn from a thorough review of regulatory information obtained from the FDA and patent searches, company filings and literature, Internet sources; foreign regulatory agencies such as the United Kingdom's Medicines and Healthcare Regulatory Agency (MHRA) and other sources.

Kline Credentials

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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.

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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- U.S. Consumers' Perceptions of OTC Drugs
- Nonprescription Drugs Canada
- OTC Competitor Cost Structures USA
- Nonprescription Drugs USA
- U.S. Retailers' Perceptions of OTC Drug Marketers
- International Rx-to-OTC-Switch Forecasts
- Rx-to-OTC Switch: The Next Wave
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