"The majority of adults have experienced some kind of cold, cough, flu, allergy, or related symptom in the past 12 months. Over-the-counter remedies are the most common method for treating these ailments. Yet, after achieving growth from 2013-17, category sales softened in 2018. Mintel's forecast calls for a gain between 2018 and 2023 as a variety of treatment methods are adopted."

- Andrea Wroble, Research Analyst

This report looks at the following areas:

- Sales growth stalls for OTC remedies
- Concern for unwanted side effects of OTC medications
- Shifts in population challenge the market

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.
Cough, Cold, Flu, and Allergy Remedies - US - April 2019

Table of Contents

Overview

What you need to know
Definition

Executive Summary

Overview
Figure 1: Ailments experienced in past 12 months, December 2018

The issues
Sales growth stalls for OTC remedies
Figure 2: Total US sales and fan chart forecast of cough, cold, flu, and allergy remedies, at current prices, 2013-23

Concern for unwanted side effects of OTC medications
Figure 3: Select attitudes toward recovery and remedies – Any agree/disagree (NET), December 2018

Shifts in population challenge the market
Figure 4: Population aged 18 or older, by age, 2013-23

The opportunities
Natural remedies alleviate safety concerns
Figure 5: Attitudes toward natural remedies – Any agree/disagree (NET), December 2018

Holistic health trends provide tailwind for natural/herbal remedies
Figure 6: Interest in natural and homeopathic product treatment – Any use or interest (net), December 2018

The tendency to push on
Figure 7: Cluster groups based on attitudes toward recovery and remedies, December 2018

What it means

The Market – What You Need to Know

After an accelerated growth period, sales stall
Cold/sinus remedies dominate market share
Natural approach to recovery/remedies widely embraced
Age and lifestage drive engagement
Strong growth of Hispanic population continues

Market Size and Forecast

Market stagnates in 2018
Figure 8: Total US sales and fan chart forecast of cough, cold, flu, and allergy remedies, at current prices, 2013-23

Figure 9: Total US retail sales and forecast of cough, cold, flu, and allergy remedies, at current prices, 2013-23

Market Breakdown

Cold/sinus remedies dominate market share
Figure 10: Share of total US retail sales of cough, cold, flu, and allergy remedies, by segment, 2018

Figure 11: Total US retail sales of cough, cold, flu, and allergy remedies, by segment, at current prices, 2016 and 2018

Other retailers overtake drug stores as leading retailer
Market Perspective

Approach to recovery/remedies reflects broad reach of naturalness
Figure 13: Cluster groups based on attitudes toward recovery and remedies, December 2018

Push on
Figure 14: Profile of Push on, by select demographics, December 2018

Stay home
Figure 15: Profile of Stay home, by select demographics, December 2018

Natural
Figure 16: Profile of Natural, by select demographics, December 2018

Market Factors

Population growth favorable to market; age impacts engagement
Figure 17: Population aged 18 or older, by age, 2013-23

Family households important to market
Figure 18: Family and non-family households, 2013-18

Hispanics offer opportunity for category growth
Figure 19: US Population, by Hispanic origin, 2013-23
Figure 20: Attitudes toward recovery and remedies, by Hispanic origin, December 2018

Key Players – What You Need to Know

Private label leads sales of CCFA remedies
Strategic marketing helps brands stand out in crowded market
Market struggles: apathetic consumer, static product launch activity
Moving toward naturalness, preventative health

Company and Brand Sales

Mucinex and Delsym face headwinds
Zyrtec closing the gap on Claritin
Private label pushes forward with success in cold/sinus remedies
Sales of cough, cold, flu and allergy remedies by company
Figure 21: Multi-outlet sales of cough, cold, flu, and allergy remedies, by leading companies, rolling 52 weeks 2017 and 2018

What’s Working?

Marketing efforts make a difference in “congested” market
Theraflu delivers new products leveraging digital campaign
Figure 22: Multi-outlet sales of cold/sinus remedies for Theraflu, rolling 52 weeks 2017 and 2018

Zicam promotes differentiated brand position
Figure 23: Become a zifan for Zicam campaign, November 2018
Figure 24: Multi-outlet sales of cold/sinus remedies for Zicam, rolling 52 weeks 2017 and 2018

What’s Struggling?
Flat performance reflects consumer apathy
Figure 25: Multi-outlet sales of cough, cold, flu, and allergy remedies, by leading companies, rolling 52 weeks 2017 and 2018

Incremental decline in product launch activity mirrors sales performance
Figure 26: Cough, cold, flu, allergy product launches, by launch type, 2017-18

What’s Next?
Naturalness elevates health benefit of OTC remedies
Figure 27: Share of cough, cold, flu, allergy product launches, by top 3 leading claim categories, 2015-19
Figure 28: Share of cough, cold, flu, allergy product launches, by leading claims, 2015-19

Taking a cue from food and personal care: free-from claims
Figure 29: Cough, cold, flu, allergy free-from product launches, by launch type, 2017-18

Preventative care plays to quest for holistic health

The Consumer – What You Need to Know
Prevalence of cough, cold, flu, and allergies is common
OTC remedies provide go-to solution for treatment
Liquid, tablets, and hot beverages are preferred formats
Adults take multi-pronged approach to treating ailments
OTC meds have unwanted side effects, fuel interest in natural remedies
Majority of adults skip the flu shot

Ailments Experienced
Most adults combat cold, cough, flu, allergy or related ailments
Figure 30: Ailments experienced in past 12 months, December 2018

Age influences likelihood of ailments experienced
Figure 31: Ailments experienced in past 12 months, by age, December 2018

Families are prime sufferers of cough, cold, and flu ailments
Figure 32: Ailments experienced in past 12 months, by parental status and household size, December 2018

The majority of adults experience 3+ ailments
Figure 33: Repertoire of ailments experienced in past 12 months, December 2018

Trial and Interest in Product Treatment
OTC remedies are the go-to solution in treatment
Figure 34: Trial and interest in product treatment, December 2018

Younger adults drive interest in herbal and homeopathic options
Figure 35: Any use or interest (net) in natural/herbal and homeopathic remedies, by age, December 2018

Product Formats
Liquid, tablets, and hot beverages are go-to product formats
Figure 36: Product format preference, December 2018

Men turn to liquids to get the job done
Figure 37: Select product format preference, by gender, December 2018

Hispanics rely on topical and natural formats
Cough, Cold, Flu, and Allergy Remedies - US - April 2019

Report Price: £3254.83 | $4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

**Attitudes toward Medication**
- Majority of sufferers take medication; some can't take time to rest
  - Figure 39: Attitudes toward medication, December 2018
- Under-45s more likely to cover up symptoms with medication
  - Figure 40: Attitudes toward medication, by age and parental status, December 2018
- Attitudes toward medication vary by ailment
  - Figure 41: Crosstab of attitudes toward medications by ailments experienced in past 12 months, December 2018

**Attitudes toward Recovery and Remedies**
- Preference for rest and natural/home remedies
  - Figure 42: Attitudes toward recovery and remedies, December 2018
- 18-44s and parents turn to natural remedies
  - Figure 43: Select attitudes toward recovery and remedies, by age and parental status, December 2018
- Natural and home remedies preferred among Hispanics
  - Figure 44: Attitudes toward recovery and remedies, by Hispanic origin, December 2018

**Attitudes and Deterrents toward Flu Shots**
- Two in five adults get a flu shot every year
  - Figure 45: Attitudes toward flu shots, December 2018
- Older adults more likely to get annual flu shot
  - Figure 46: Attitudes toward flu shots, by age, December 2018
- Doctor’s office most popular location for flu shots
  - Figure 47: Flu shot location, December 2018
- Seniors get their shots at doctor’s office
  - Figure 48: Flu shot location, by age, December 2018
- Unwanted side effects and ineffectiveness deter flu shot use
  - Figure 49: Deterrents for flu shot, December 2018

**Appendix – Data Sources and Abbreviations**

- Data sources
  - Sales data
  - Fan chart forecast
  - Consumer survey data
  - Abbreviations and terms
  - Abbreviations

**Appendix – The Market**

- Figure 50: Total US retail sales and forecast of cough, cold, flu, and allergy remedies, at inflation-adjusted prices, 2013-23
- Figure 51: Total US retail sales and forecast of cough, cold, flu, and allergy remedies, by segment, at current prices, 2013-23
Appendix – Key Players

Figure 52: Multi-outlet sales of cold/sinus remedies, by leading companies and brands, rolling 52 weeks 2017 and 2018
Figure 53: Multi-outlet sales of allergy remedies, by leading companies and brands, rolling 52 weeks 2017 and 2018
Figure 54: Multi-outlet sales of cough/throat remedies, by leading companies and brands, rolling 52 weeks 2017 and 2018