

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.

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



"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
Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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.

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

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

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.

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**
Figure 12: Total US retail sales of cough, cold, flu, and allergy remedies, by channel, at current prices, 2016 and 2018

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**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

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.

- **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

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

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.

- 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**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

| | |
|----------|----------------------|
| Visit | store.mintel.com |
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

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.

Figure 38: Select product format preference, by Hispanic origin, December 2018

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 DETERRENENTS 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**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



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.

- **Abbreviations**
- **Terms**

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

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.