

Over the Counter (OTC) Drugs Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Cough, Cold & Flu, Vitamins, Mineral, & Supplements (VMS), Analgesics, Gastrointestinal Products, Dermatology Products, Others), By Route of Administration (Oral, Parenteral, Topical, Others), By Dosage Form (Tablets, Capsules, Liquids & Solutions, Cream/Lotion/Ointments, Others), By Distribution Channel (Retail Pharmacy, Hospital Pharmacy, E-Pharmacy), By Region and Competition

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Report description:

Global Over the Counter (OTC) Drugs Market has valued at USD 186.93 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.41% through 2028. - Over-the-counter (OTC) medicine, also known as nonprescription medicine, is readily available without a prescription. It offers a convenient and accessible option for managing common ailments. OTC medications, when used according to instructions or under the guidance of a healthcare professional, are both safe and highly effective.

OTC medications encompass a wide range of drugs designed to alleviate various symptoms such as aches, pains, and itches. By providing relief without the need for a doctor's visit, these medications not only offer cost-effective care but also help alleviate the workload on physicians. OTC drugs contribute to the development of a diverse product portfolio for pharmaceutical companies in the healthcare market. They also facilitate the expansion of product ranges for consumer brands of consumer goods companies. With their widespread availability in pharmacies, OTC medications play a crucial role in promoting accessible healthcare for all.

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Key Market Drivers

Rising Prevalence of Diseases

The growing prevalence of diseases and the use of over the counter (OTC) drugs are key drivers behind the expansion of the OTC drug market. The global incidence of acute and chronic diseases, including cardiovascular, neurological, orthopedic, and respiratory conditions, is witnessing a significant rise. In the United States alone, more than 550,000 individuals are diagnosed with heart failure annually. According to the Centers for Disease Control and Prevention (CDC), approximately 790,000 Americans suffer heart attacks each year, with around 580,000 experiencing their first heart attack and 210,000 facing a recurrent episode. Risk factors such as diabetes, hypertension, tobacco use, and obesity are contributing to the increasing prevalence of chronic cardiac, neurological, and orthopedic ailments. Consequently, the adoption of OTC medicines has become more prevalent as patients seek effective and convenient treatment options for their chronic conditions. For instance, aspirin is widely utilized to prevent heart attacks, strokes, and other cardiovascular diseases among patients with a history of heart disease or those at high risk. Similarly, ibuprofen and acetaminophen are commonly employed to alleviate pain and inflammation associated with ailments like arthritis, chronic back pain, and headaches. Thus, the growing burden of chronic diseases worldwide is anticipated to drive the demand for OTC drugs, bolstering market growth in the forecast period.

High Cost of Rx Drugs Leading to Shift Towards OTC Drugs

The escalating cost of prescription drugs in recent years has sparked a significant shift in consumer preferences and healthcare strategies, resulting in a notable increase in the demand for over the counter (OTC) drugs. This transformation can be attributed to several key factors. The exorbitant prices of prescription medications have become a formidable burden for many individuals and families, leading them to seek more cost-effective alternatives. The high cost of prescription drugs often forces patients to make difficult choices between necessary medications and other essential expenses, pushing them towards OTC options, which are generally more affordable.

The rise of high-deductible health insurance plans has further incentivized consumers to explore OTC alternatives. With the growing prevalence of these plans, individuals are often responsible for a significant portion of their healthcare expenses out of pocket. Consequently, many are opting for OTC drugs that offer relief for common ailments without the need for expensive doctor visits and prescription copayments.

The increasing availability of information and consumer empowerment through digital platforms and healthcare apps has made it easier for individuals to self-diagnose and self-treat minor health concerns with OTC drugs. This trend empowers patients to take more control of their healthcare decisions and explore accessible, affordable, and convenient OTC options.

Increasing Approval of OTC Drugs

The increasing approval of over the counter (OTC) drugs by regulatory agencies around the world has undoubtedly led to a surge in the demand for these accessible medications. This trend can be attributed to several key factors. The approval of formerly prescription-only medications for OTC use signifies a growing recognition of the safety and efficacy of these drugs when used responsibly and without a doctor's prescription. Regulatory agencies, such as the FDA in the United States, are continuously evaluating the potential for reclassification, allowing more drugs to be available without a prescription. As a result, consumers have a broader range of treatment options for common health issues, from allergies to heartburn and pain relief.

Moreover, the expansion of OTC drug offerings empowers individuals to take greater control of their health and well-being. This approval process enhances consumer access to medications, reducing the need for frequent doctor visits and prescription costs. It also encourages people to proactively address minor health concerns, promoting early intervention and self-care. The convenience and accessibility of OTC drugs further fuel their demand. These products are readily available at local pharmacies, supermarkets, and even online, making them easily accessible to consumers. People appreciate the convenience of purchasing medications when needed, without the delays associated with scheduling doctor appointments and waiting for prescription refills. The increasing approval of OTC drugs reflects a growing trust in their safety and effectiveness. This trend promotes consumer empowerment and convenience, enabling individuals to make informed choices about their healthcare needs. As more prescription medications become available over the counter, the demand for OTC drugs is likely to continue its upward trajectory, reshaping the landscape of self-care and healthcare access for the better.

Increased Patent Expirations of Many Pharmaceuticals

The increasing number of patent expirations in the pharmaceutical industry has had a significant impact on the demand for

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over-the-counter (OTC) drugs, leading to a notable shift in consumer preferences and healthcare choices. Several key factors contribute to this trend.

These generic medications are typically more affordable than their brand-name counterparts, making them an attractive option for cost-conscious consumers. As a result, individuals are more likely to choose OTC alternatives for common health issues, such as allergies, pain relief, or acid reflux, where OTC options are readily available and cost-effective. The introduction of generic versions of prescription drugs increases competition within the pharmaceutical industry. This competition drives down prices, not only for generic prescription medications but also for OTC drugs. As consumers become accustomed to the cost savings associated with generic prescriptions, they are more inclined to explore the OTC aisle for other affordable remedies. The increased availability of information and resources online empowers individuals to research and self-diagnose minor health concerns. Armed with knowledge about the active ingredients in OTC drugs, consumers can confidently select OTC products that closely match the effects of prescription medications, especially when generic options are available. The expiration of patents often coincides with marketing efforts by pharmaceutical companies to promote OTC versions of their formerly prescription-only drugs. This marketing push, combined with consumer familiarity with the active ingredient, contributes to increased demand for OTC alternatives.

Key Market Challenges

Price Sensitivity Issues Associated with Over-The-Counter (OTC) Drugs

Price sensitivity issues associated with over-the-counter (OTC) drugs pose challenges to the growth of the OTC drug market. One of the major challenges in the global OTC drug market is price sensitivity. Customers exhibit high sensitivity to prices of OTC medicines as they perceive them to be less essential compared to prescription drugs. Consequently, customers are more inclined to choose cheaper generic drugs or forego treatment altogether. This creates pressure on manufacturers to maintain low prices, impacting profit margins and potentially hindering investment in research and development (R&D). Competitive pricing is another area affected by price sensitivity. With the entry of more players in the market, vendors need to competitively price their products to stay relevant. This often leads to lower prices and narrower profit margins. Consequently, this trend may also contribute to the lack of differentiation between similar OTC products, which can adversely affect market growth. When faced with price competition, vendors are compelled to cut costs, which may have negative implications for product quality and effectiveness. In summary, price sensitivity significantly influences the OTC drug market, constraining its growth and innovation potential during the forecast period.

Inaccurate Self-Diagnosis

The expansion of the global over-the-counter drug industry is expected to face several challenges, including inaccurate self-diagnosis leading to the use of ineffective medications. Instances of pharmaceutical errors and adverse physical effects resulting from over-the-counter cough and cold remedies have been reported. Additionally, drug abuse and addictive behaviors pose further obstacles to market growth.

Individuals who lack knowledge about drugs and medications often consume them without consulting a healthcare professional, which can negatively impact consumer health. Such actions can also pose risks to pharmacies and drug stores, as there have been cases of fatalities due to the ingestion of incorrect pills or medications. Prohibiting the sale of over-the-counter (OTC) medications could help prevent similar incidents. Consequently, during the forecast period, the preservation of human life will act as a constraint on the expansion of the over-the-counter (OTC) medicine industry.

In certain regions, the sale of over-the-counter (OTC) medications is prohibited, requiring adherence to a set of regulations and laws. The Food and Drug Administration (FDA) has established regulations that prohibit the sale of over-the-counter (OTC) medications. Many developed nations have implemented strict restrictions on the sale of over-the-counter (OTC) medicines. Consequently, governmental regulations will present significant obstacles to the over-the-counter (OTC) medicine market during the forecast period.

Key Market Trends

Increasing Geriatric Population

The increasing geriatric population is a key trend influencing the over-the-counter drug market growth. The elderly population around the world is increasing year by year. According to the World Health Organization (WHO), by 2050, it is projected to add about 1.5 billion people over the age of 65. This demographic shift is particularly notable in developing countries such as China, India, Japan, Bangladesh, and South Korea, where the elderly population is expected to rise significantly.

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Elderly populations face a myriad of health problems, including but not limited to cancer, diabetes, hypertension, and fluctuating blood sugar levels. Managing these health problems often requires regular medication intake. In light of this, older individuals often prefer over-the-counter (OTC) medications for symptom relief, as they provide convenience and accessibility without the need for a prescription. Consequently, the rising geriatric population's inclination towards OTC medications is expected to drive substantial growth in the market during the forecast period.

High Adoption and Acceptance In Developing Markets

The high adoption and acceptance of over-the-counter (OTC) drugs in developing markets have been instrumental in driving an increase in demand for these accessible medications. Several key factors contribute to this trend. As more individuals migrate to urban centers and gain access to pharmacies and drugstores, the convenience and availability of OTC drugs become increasingly attractive. This convenience factor is pivotal, especially in regions where healthcare infrastructure may still be developing, making OTC drugs an accessible and immediate solution to common health concerns. Moreover, in many developing markets, there is a cultural preference for self-medication and home remedies. OTC drugs align well with these preferences, allowing individuals to address minor health issues independently and without the need for a doctor's visit. This cultural acceptance of self-care further fuels the demand for OTC options.

Additionally, the cost-effectiveness of OTC drugs is a significant driver in developing markets where healthcare expenses can be a considerable burden on households. Many OTC drugs offer a more affordable alternative to prescription medications, making them an attractive choice for individuals seeking relief from common ailments without breaking the bank.

Segmental Insights

Product Insights

Based on the product, the cold, cough & flu remedies accounted for a significant revenue share in 2022. This dominance can be attributed to seasonal variations, leading to an increase in the occurrence of common colds and coughs among the population. The rise in the senior population, which is more susceptible to cough and colds, coupled with increased automobile pollution, has further contributed to the demand for remedies in this segment. Moreover, the continual growth in research and development activities, along with increasing awareness about advanced medications, is expected to drive the revenue generation of cough remedies in the coming years. The expansion of testing and research facilities, particularly in the pharmaceutical and biotechnology industries, will also play a crucial role in the growth of this segment.

Cold, cough & flu drugs play a vital role in alleviating the symptoms associated with regular colds. These symptoms include a runny nose, sore throat, coughing, and sneezing. According to the Centers for Disease Control and Prevention, cold and cough are the most prevalent illnesses in children under the age of ten and the elderly population over 65. This demographic trend further fuels the demand for effective treatments. The cold, cough & flu remedies segment is expected to experience sustained growth in the market due to various factors contributing to its revenue generation.

Distribution Channel Insights

Based on the distribution channel, the retail pharmacies segment dominated the market with the highest market share during 2022. This is primarily attributed to the rising number of retail pharmacies providing over the counter (OTC) drugs. The convenience and accessibility offered by retail pharmacies have contributed to the growing preference among patients for obtaining medications without a prescription. With an increasing number of retail pharmacies offering a wide range of OTC medications, the drug stores and retail pharmacies category is expected to continue to hold the greatest market share over the projection period.

On the other hand, the e-pharmacies segment is the fastest-growing segment in the over the counter (OTC) drugs market. This growth can be attributed to the significant increase in internet penetration, particularly in developing and underdeveloped regions. Online pharmacies, also known as internet pharmacies or mail-order pharmacies, have gained popularity due to their convenience and ability to deliver orders to consumers through shipping firms, mail services, or online pharmacy web portals. The ease of ordering medications online has attracted a growing number of consumers to opt for e-pharmacies, contributing to their rapid growth in the OTC drugs market.

Regional Insights

According to market analysis, the North America segment emerged as the dominant force in the global over the counter (OTC) drugs market in 2022, in terms of revenue, and is projected to maintain its supremacy throughout the forecast period. This can be

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attributed to the increasing consumer preference for OTC drugs over prescription drugs in the region. The growth of the OTC drugs market in North America is primarily driven by the rising consumption of such drugs. Notably, a National Institute of Health report states that 93% of adults in the U.S. prefer using OTC drugs for minor illnesses before seeking professional help, while 85% of parents prefer the same for their children. Furthermore, the preference for OTC drugs over prescription drugs is also contributing to the growth of the North America OTC drugs market.

Conversely, Europe is predicted to offer the most lucrative opportunities during the forecast period. This projection is based on the widespread practice of self-medication and the presence of numerous OTC drugs manufacturing companies in the region. Additionally, increased public awareness about OTC drugs is fueling market expansion in Europe.

Key Market Players

Sanofi S.A.

Pfizer Inc.

GlaxoSmithKline plc

Perrigo Company plc

Reckitt Benckiser Group PLC

Takeda Pharmaceutical Company Ltd

Boehringer Ingelheim International GmbH

Sun Pharmaceutical Industries Ltd.

Teva Pharmaceutical Industries Ltd.

Glenmark Pharmaceuticals Ltd.

Report Scope:

In this report, the Global Over the Counter (OTC) Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

? Over the Counter (OTC) Drugs Market, By Product Type:

o Cough

o Cold & Flu

o Vitamins, Mineral

o & Supplements (VMS)

o Analgesics

o Gastrointestinal Products

o Dermatology Products

o Others

? Over the Counter (OTC) Drugs Market, By Dosage Form:

o Tablets

o Capsules

o Liquids & Solutions

o Cream/Lotion/Ointments

o Others

? Over the Counter (OTC) Drugs Market, By Route of Administration:

o Oral

o Parenteral

o Topical

o Others

? Over the Counter (OTC) Drugs Market, By Distribution Channel:

o Retail Pharmacy

o Hospital Pharmacy

o E-Pharmacy

? Over the Counter (OTC) Drugs Market, By Region:

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o North America

? United States

? Canada

? Mexico

o Europe

? France

? United Kingdom

? Italy

? Germany

? Spain

o Asia-Pacific

? China

? India

? Japan

? Australia

? South Korea

o South America

? Brazil

? Argentina

? Colombia

o Middle East & Africa

? South Africa

? Saudi Arabia

? UAE

? Kuwait

? Turkey

? Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Over the Counter (OTC) Drugs Market.

Available Customizations:

Global Over the Counter (OTC) Drugs market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

? Detailed analysis and profiling of additional market players (up to five).

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