Description: The US Market for Rx to OTC Switches

Prescription products that are marketed as consumer products are known as Rx-to-OTC. They represent an important part of pharmaceutical strategy and a growing market. This report, The U.S. Market for Rx-to-OTC Switches focuses on several treatment segments in which Rx-to-OTC switches are available.

Patient-consumer awareness of health issues is driving the Rx-to-OTC market. Consumers are more prepared to take responsibility for their own health and are willing to purchase medicines over the counter. An increased focus on cost-savings, coupled with the effects of advertising and promotion, result a higher rate of OTC purchases. Elderly baby boomers, are taking greater interest in their health, and growing the Rx-to-OTC industry in America.

Segments profiled in the report include:
- Smoking Cessation
- Weight Loss
- Gastrointestinal Drugs
- Hair Loss Products
- Hormones
- Allergy
- Analgesics, NSAIDs, and Pain Treatments
- Anti-Infectives
- Oral Care
- Overactive Bladder
- Rectal Ointments
- Sleep-aids
- Cough, Cold, and Sinus Products

In addition to the areas with switches in place, Kalorama Information has identified other areas which may be open to Rx-to-OTC switches in the future and are in development. These products are listed.

Present revenues and past revenues for segment markets consist of the switched brands and OTC drugs containing switched ingredients. Five year forecasts are provided.

In addition to this information, the study tracks current issues and trends affecting the industry and identifies trends that may arise in the future. Each segment provides an overview, descriptions of products on the market, market estimates and forecasts, and competitive analysis of leading providers. The report includes statistical information for conditions and diseases affecting the U.S. population, including detail discussions, tables and figures.

Contents:
- EXECUTIVE SUMMARY
- Overview
Scope and Methodology
Size and Growth of the Market
Issues and Trends Affecting the Rx-to-OTC Switches Market
Leading Participants
THE OTC DRUG INDUSTRY
Overview of the Over-the-Counter Drug Market

Distribution Channels
Retail Market Value?OTC Drug Industry

Development of the Rx-to-OTC Drug Market
U.S. Drug Regulation

Expanding Drug Access with Behind the Counter Status

Nonprescription Drug Safe Use Regulatory Expansion (NSURE)

Physician Uncertainty in Increasing Nonprescription Drug Access
Pharmacists Generally Favor Self-Medication
Online Resources for Health Information and Drug Selection

Social Media's Influence on Consumer Health Products

U.S. Demographics and the Non-Prescription Drug Market

U.S. Population over 65
U.S. Health Spending Indicators

International Trends in Rx-to-OTC Switches

ALLERGY, COUGH, COLD, AND SINUS PRODUCTS
Overview

Antihistamines
Decongestants
Cough Preparations
Ophthalmic Preparations
Other Allergy Preparations

Mast Cell Stabilizers
Intranasal Steroids

Description of Conditions

Allergic Rhinitis
Common Cold
Sinusitis
Hives
Ocular Allergies

Product Analysis

Switched Products

Antihistamines
Decongestants
Cough Preparations
Ophthalmic Preparations
Other Allergy Preparations

Recent Switch Activity

Flonase Allergy
Nasacort Allergy
Prescription Products with Anticipated OTC Approvals

Astelin Nasal Spray
Beconase AQ
Rhinocort
Clarinex
Xyzal
Atrovent Nasal Spray
Nasonex
Singulair

Market Analysis
Market Size and Forecast
Competitive Analysis

ANALGESICS AND OTHER PAIN RELIEVERS
Overview

Analgesics
Nonsteroidal Anti-inflammatory Drugs
Topical Pain Relievers and Other Similar Products

Description of Conditions

Pain
Inflammation

Product Analysis

Switched Products

Antipruritic
Internal analgesic/antipyretic
Oral Anesthetic

Prescription Products with Anticipated OTC Approvals

Nonsteroidal anti-inflammatory drugs

Voltaren (diclofenac)
Diflunisal
Etodolac
Nabumetone
Feldene (piroxicam)

Migraine Treatments

Axert
Imitrex
Maxalt
Zomig

Other Migraine Treatments

Market Analysis
Market Size and Forecast
Competitive Analysis

ANTI-INFECTIVES
Overview

Antibiotics
Antifungals
Antivirals
Antiparasitics
Description of Conditions

Vaginal Infections
Athlete's Foot
Jock Itch
Ringworm
Dandruff
Scabies and Pediculosis
Pinworm
Fungal Nail Infections

Product Analysis

Switched Products

Antifungals
Anthelmintics
Antimicrobials
Pediculicides

Prescription Products with Anticipated OTC Approvals

Antivirals
Zovirax
Valtrex
Denavir
Famvir
Influenza Antivirals

Antibiotics
Antibiotic Public Health Preparedness

Antifungals

Market Analysis

Market Size and Forecast
Competitive Analysis

GASTROINTESTINAL DRUGS
Overview
Description of Conditions

Nausea
Diarrhea
Constipation
Heartburn
Acid reflux

Product Analysis

Switched Products

Histamine H2 Inhibitors
Proton Pump Inhibitors
Antidiarrheals
Laxatives
Antiemetics

Recent Switch Activity
Prescription Products with Anticipated OTC Approvals

Proton Pump Inhibitors

Protonix
Aciphex

Mucosal Protectants
Antiemetics

Market and Competitive Analysis

Market Size and Forecast
Competitive Analysis

SMOKING CESSATION PRODUCTS
Overview
Description of Conditions

Lung Cancer and Tobacco Use

Product Analysis

Switched Products

Nicotine Chewing Gum
Nicotine Transdermal patch
Nicotine Oral lozenge

Prescription Products with Anticipated OTC Approvals

Nicotrol
Chantix

Market Analysis

Market Size and Forecast
Competitive Analysis

OTHER DRUG CLASSIFICATIONS
Overview

Contraceptives
Dental Rinses and Fluorides
Hair Growth Products
Rectal Ointments
Sleep Aids
Weight Management

Description of Conditions

Pregnancy

Abortion Rates
Contraceptive Use

Dental carries
Hereditary Hair Loss
Hemorrhoids
Sleeplessness
Obesity
Urinary Incontinence/Overactive Bladder
Conditions with Possible Future OTC Treatments

Acne Vulgaris
Benign Prostate Hypertrophy (BPH)
Elevated Cholesterol
Erectile Dysfunction
Menopause and Hormone Replacement
Menorrhagia
Osteoporosis

Product Analysis

Switched Ingredients

Contraceptives
Dental rinses and fluoride
Hair growth
Overactive Bladder
Rectal ointments
Sleep aids
Weight Management

Prescription Products with Anticipated OTC Approvals

Acne Treatments
Cholesterol-reducing Drugs (antilipidemics)
Blood Products

BPH
Erectile Dysfunction
Hair Loss Treatment
Hormone-Replacement Therapies (HRT)
Osteoporosis Treatments
Opioid Overdose Treatment
Overactive Bladder
Sleep Aids

Market Analysis

Current Market Segments
Short-Term New Product Segment Development; 2015-2016

Antilipidemics
Opioid Overdose Treatment
Sexual Dysfunction

New Product Segments; Post 2016

BPH Treatments
Hormone Replacement Therapy and Osteoporosis Treatments

Competitive Analysis
TOTAL RX-TO-OTC DRUG MARKET SUMMARY
Overview
Total market Size and Forecast
Switch Forecast in the United States
Markets by Segments
Competitive Analysis
PROFILES FOR MAJOR RX-TO-OTC PARTICIPANTS
Introduction
Strategies for Continued Product Growth
Mergers and Acquisitions
GlaxoSmithKline and Novartis AG
Bayer AG and Merck & Co.
Prestige Brands and Insight Pharmaceuticals
Perrigo Company Acquisitions
Procter & Gamble and Teva Pharmaceutical Industries
Sanofi and Chattem Consumer
Schering-Plough and Merck & Co.
Wyeth and Pfizer
Reckitt Benckiser and Adams Respiratory Therapeutics

Simultaneous Marketing - Prescription vs OTC
Impact on the Prescription Drug Manufacturer
Direct-to-Consumer Advertising
Patent Expiration
Bayer
Boehringer Ingelheim
GlaxoSmithKline
Johnson & Johnson
Novartis
Perrigo Company
Pfizer
Prestige Brands
Procter & Gamble
Reckitt Benckiser
Sanofi/Chattem
TEVA

COMPANY DIRECTORY
LIST OF EXHIBITS
EXECUTIVE SUMMARY
Table 1-1
The U.S. Market for Rx-to-OTC Switches 2009-2019
Figure 1-1
The U.S. Market for Rx-to-OTC Switches, 2009-2019
THE OTC DRUG INDUSTRY
Table 2-1
Number of Retail Establishments in the United States and Non-Prescription Medicine Availability, 2012
Table 2-2
OTC Drug Retail Sales -, 2000-2014
Figure 2-1
OTC Retail Sales, 2000-2014
Table 2-3
Rx-to-OTC Switches Approved by the FDA 1976–2014
Table 2-3 (continued)
Rx-to-OTC Switches Approved by the FDA 1976–2014
Figure 2-2
Number of New Rx-to-OTC Switches in the United States, per Year 1976-2014
Table 2-4
Statistics for Selected Rx-to-OTC Switches (United States)
Table 2-5
Estimated OTC Sales by Product Type and Percent of Sales Attributed to Rx-to-OTC Switched Ingredients
Figure 2-3
Estimated OTC Sales by Product Type and Percent of Sales Attributed to Rx-to-OTC Switched Ingredients
Figure 2-4
Typical Pharmacist-Consumer OTC Drug Counseling Session
Figure 2-5
Internet Users, Percent of Total Population, 2014
Table 2-6
The U.S. Population, 1980-2050
Figure 2-6
The U.S. Population, 1980-2050
Table 2-7
Percent U.S. Population Over Age 65 by Year, 2000-2050
Figure 2-7
United States Population Trend Age 65+, 2000-2050
Table 2-8
Figure 2-8
Table 2-9
Legal Classification Status of Selected Ingredients Worldwide
Table 2-9 (continued)
Legal Classification Status of Selected Ingredients Worldwide (continued)
Table 2-9 (continued)
Legal Classification Status of Selected Ingredients Worldwide (continued)
Table 2-10
Individual Ingredients Switched from Rx to OTC by Country, 2013/2014
ALLERGY, COUGH, COLD, AND SINUS PRODUCTS
Figure 3-1
U.S. Incidence of Allergy, Cough, Cold, Sinus Conditions, Superimposed on Total Population, 2014 Estimate
Table 3-1
Allergy, Cough, Cold, Sinus Product Ingredients Transferred from Rx-to-OTC Status. 54
Table 3-1 (continued)
Allergy, Cough, Cold, Sinus Product Ingredients Transferred from Rx-to-OTC Status. 55
Figure 3-2
Allergy, Cough, Cold, Sinus Product Ingredients Transferred from Rx-to-OTC by Year56
Table 3-2
Prescription Drugs with Anticipated OTC Approval by Ingredient, Trade Name, Distributor and Current Activity
Table 3-3
The U.S. Market for Rx-to-OTC Switches Allergy, Cough, Cold, and Sinus Product Revenues 2009-2019
Figure 3-3
The U.S. Market for Rx-to-OTC Switches Allergy, Cough, Cold, and Sinus Product Revenues 2009-2019
Figure 3-4
The U.S. Market for Rx-to-OTC Switches: Allergy, Cough, Cold, and Sinus Products, by Percent and Product Type, 2014
Figure 3-5
U.S. Market for Rx-to-OTC Switches: Allergy, Cough, Cold, Sinus, Value Switched Brands vs. Switched Equivalents (Generics), 2009-2019
Table 3-4
Leading Suppliers’ Shares for U.S. Market for Rx-to-OTC Switches: Allergy, Cough, Cold, and Sinus Products, 2014
Figure 3-6
Leading Suppliers’ Shares for U.S. Market for Rx-to-OTC Switches: Allergy, Cough, Cold, and Sinus Products, 2014
ANALGESICS AND OTHER PAIN RELIEVERS
Figure 4-1
U.S. Incidence of Conditions with Pain and Inflammatory Symptoms Superimposed on Total Population, 2014 Estimates
Table 4-1
Analgesics, NSAIDs and Other Ingredients Transferred from Rx-to-OTC Status
Figure 4-2
Analgesics, NSAIDs and Other Ingredients Transferred from Rx-to-OTC by Year
Table 4-2
Prescription Drugs with Anticipated OTC Approval by Ingredient, Trade Name, Distributor and Current Activity
Table 4-3
The U.S. Market for Rx-to-OTC Switches Analgesic Product Revenues 2009-2019
Figure 4-3
Ordering:

Order Online - [http://www.researchandmarkets.com/reports/3098816/](http://www.researchandmarkets.com/reports/3098816/)

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: The US Market for Rx to OTC Switches, 7th Edition
Web Address: http://www.researchandmarkets.com/reports/3098816/
Office Code: SC

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td></td>
<td>USD 3995</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide:</td>
<td></td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:          Mr [ ]  Mrs [ ]  Dr [ ]  Miss [ ]  Ms [ ]  Prof [ ]  Last Name: __________________________
First Name: __________________________
Email Address: * __________________________
Job Title: __________________________
Organisation: __________________________
Address: __________________________
City: __________________________
Postal / Zip Code: __________________________
Country: __________________________
Phone Number: __________________________
Fax Number: __________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World