

Over the Counter (OTC) Drugs - Market Insight, Competitive Landscape, and Market Forecast, 2027

<https://marketpublishers.com/r/OA2DC89D3A1CEN.html>

Date: July 2022

Pages: 100

Price: US\$ 2,750.00 (Single User License)

ID: OA2DC89D3A1CEN

Abstracts

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Over The Counter Drugs Market By Therapeutic Category (Cough, Cold & Allergy, Gastrointestinal, Analgesics, Dermatological, And Others), By Formulation (Tablets, Powders & Capsules, Drops, Topical Creams & Ointments, And Others), By Distribution Channel (Hospitals Pharmacies, Retail Pharmacies, Online Pharmacies, And Others), and by geography is expected to grow at an appreciable CAGR forecast till 2027 owing to the rapid switch of prescription drugs (RX) to OTC status as well as increasing prevalence of various indications resulting in incidents of acute and chronic pains leading to extensive use of OTC drugs

The global over-the-counter (OTC) drugs market was valued at USD 151.15 billion in 2021, growing at a CAGR of 5.93% during the forecast period from 2022 to 2027 to reach USD 213.08 billion by 2027. The OTC drugs market is witnessing an explosion in product demand owing to numerous reasons such as the surge in the prevalence of different indications resulting in pain leading to growing demand for analgesics. Moreover, growing prevalence of gastrointestinal issues is another key factor contributing in the growth of OTC gastrointestinal drugs. Besides the factors stated above, the rapid switch from prescription to OTC status of various medication is also expected to play a key role in establishing an upward growth trend in the OTC drugs market during the forecast period from 2022 to 2027.

OTC Drugs Market Dynamics:

One of the primary factors driving the over-the-counter drugs market growth is the upsurge in the use of analgesics due to increase in various modalities affecting the

musculoskeletal system cause problems such as arthritis, back pain, fibromyalgia among other indications such as menstrual cramps, headaches etcetera. For instance, as per the Rheumatoid Arthritis Network (2022), in 2021, 350 million people suffer from arthritis across the globe. Furthermore, as per the National Health Service UK (2022), fibromyalgia affects one in 20 people across the globe. Analgesics are a class of medication specifically aimed at providing pain relief. For arthritis, certain OTC pain relievers such as acetaminophen (Tylenol in the US) are actively consumed. Other OTC drugs pain relievers include ibuprofen or naproxen sodium. Besides analgesics, another popular category of OTC drugs include antipyretics which also include acetaminophen, ibuprofen, and dexibuprofen. Considering the growing prevalence of musculoskeletal ailments and the growing need for pain management is expected to drive the demand for OTC analgesic drugs in coming years, thereby driving the overall market for over the counter drugs during the forecast period from 2022-2027.

Another prominent factor responsible for the increasing demand of OTC drugs is the upsurge in cases of unintended pregnancies across the globe, which is expected to influence the demand for over the counter emergency contraception pills during the forecast period. For instance, as per the data provided by the World Health Organization (2022), 4 million women living in low and middle-income countries have unintended pregnancies annually across the globe. This leads to 25 million unsafe abortions and 47,000 maternal deaths every year globally. Modern methods of contraception have a vital role in preventing unintended pregnancies. The United Nation's Department of Economic and Social Affairs 2019 statistics mentioned that approximately 922 million women of reproductive age (or their partners) use contraception methods comprising various products of which emergency contraceptive pills are one of the most common and reliable sources for avoiding unintended pregnancies. Moreover, due to the COVID-19 pandemic, other alternatives available as methods of contraception such as intrauterine devices and contraceptive patches among others were not as easily accessible which further raised the demand for OTC emergency contraceptive pills among users. Therefore, the factors mentioned above indicate towards a positive growth outlook for the over the counter drugs market during the forecast period.

However, misuse of OTC drugs for substance abuse, the probability of counterfeiting of OTC drugs, and possibility of adverse drug reactions may prove to be deterrents to over-the-counter drugs market growth.

Besides the above-mentioned factors, the over the counter market was impacted by the imposition of the lockdown due to the COVID-19 pandemic. Even though this specific

market maintained a high product demand during the COVID-19 pandemic, there was a significant disruption in supply chain wherein products such as contraceptive pills, analgesics, and allergy medication witnessed a slight reduction in production in the initial phase of the lockdown. Additionally, due to the flu-like symptoms associated with the milder cases of the COVID-19 infection, there was a significant increase in the demand for OTC antipyretics such as paracetamol. Even though the demand for such products did increase during the pandemic, the supply aspect was severely affected due to disruption in supply chain such as decreased manufacturing capacity, logistic challenges, and high procurement costs. Although, the post-pandemic scenario provides an opportune environment for revenue generation for the OTC drugs market due to the resumption of activities in full capacity helping in the restoration of supply chain thereby improving the market outlook for the over the counter drugs market during the forecast period (2022-2027).

Over the Counter (OTC) Drugs Market Segment Analysis:

Over The Counter Drugs Market by Therapeutic Category (Cough, Cold, and Allergy, Gastrointestinal, Analgesics, Dermatological, and Others), by Formulation (Tablets, Powders, and Capsules, Drops, Topical Creams and Ointments, and Others), by Distribution Channel (Hospitals Pharmacies, Retail Pharmacies, Online Pharmacies, and Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the therapeutic category type segment of the over the counter drugs market, analgesics drugs were estimated to account for significant revenue share in the year 2021. This can be attributed to the rising prevalence of indications that result in pain. Accessing analgesics without prescription is an added advantage for consumers as it allows consumers to address pain without having to go to a doctor to procure a prescription. As per the U.S. National Library of Medicine (2021), approximately 25 billion doses of acetaminophen are sold alone in the United States every year. Furthermore, the rising prevalence of indications resulting in pain such as headaches, minor injuries, among others are also expected to contribute in the growing demand for OTC drugs in forthcoming years.

North America is expected to dominate the overall Over the Counter Drugs Market:

Among all the regions, North America is projected to amass the largest share in revenue generation in the OTC drugs market. Some of the factors responsible for the growth of the North America over the counter drugs market is the number of switches

from Rx to OTC status for various drugs, growing preference of OTC drugs over prescription drugs, comparatively less stringent regulatory guidelines for marketing approvals among others.

One of the prominent markets in the North American region is the United States. As per the Allergy and Asthma Foundation of America (2021), allergies are the sixth leading cause of chronic illness in the United States. The source further mentioned that over 50 million Americans experience various types of allergies each year. Additionally, as per Food Allergy and Education (2022), 32 million people have food allergies across the country. Furthermore, considering the high prevalence of food allergies in the country, the US Food and Drug Administration (FDA) classifies 8 major food items as common allergens as per the Food Allergen Labeling and Consumer Protection Act of 2004 (FALCPA). Additionally, in April, 2021, the Food Allergy Safety, Treatment, Education, and Research (FASTER) Act was signed into law, declaring sesame as the 9th major food allergen recognized by the United States. Antihistamines are popular medication for allergies which are available over the counter. Some of the over the counter antihistamine drugs include brompheniramine, cetirizine, loratadine, clemastine among others. Therefore, the rise in prevalence of allergies in the country is expected to boost the demand for OTC antihistamines thereby driving the OTC drugs market in the North American region.

Additionally, the extensive switch of the Rx medication to OTC status is another factor driving the market growth in the North American region. For instance, in March 2022, Nasonex 24HR Allergy (mometasone furoate) nasal spray was given the OTC status by the US FDA. Moreover, the rising healthcare costs is expected to add to the demand for the OTC drugs as they cost significantly less than prescription drugs. Thus all the factors stated above are predicted to aid in the growth of the North America OTC drugs market during the forecast period.

Over the Counter Drugs Market Key Players:

Some of the key market players operating in the OTC drugs market includes Johnson & Johnson Services Inc, BAYER AG, Novartis, sanofi-aventis U.S. LLC., Pfizer Inc, GlaxoSmithKline plc., Cipla Inc., Piramal Enterprises Limited, Duramed Pharmaceuticals, Inc, Glenmark Pharmaceuticals., Dr. Reddy's Laboratories, Innovus Pharmaceuticals, Inc., Teva Pharmaceutical Industries Ltd., Viatris Inc, Reckitt Benckiser Group PLC, Afaxys Pharma, LLC, FOUNDATION CONSUMER HEALTHCARE, Alcon Inc and others.

Recent Developmental Activities In Over the Counter Drugs Market:

In December 2021, the US Food and Drug Administration approved the prescription drug Lastacraft (alcaftadine ophthalmic solution), 0.25% to over-the-counter drug.

In June 2021, Bayer received the regulatory approval from the US FDA for their product Asepro Allergy as an OTC drug for temporary relief from nasal congestion, itch and runny nose, and other respiratory allergies.

In July 2020, Alcon Inc received the approval from the US FDA for Pataday Once Daily Relief Extra Strength (olopatadine hydrochloride ophthalmic solution 0.7%), formerly prescribed as Pazeo®, has been approved by the Food and Drug Administration (FDA) for sale over-the-counter (OTC) in the United States.

Key Takeaways from Over the Counter Drugs Market Report Study

Market size analysis for current OTC drugs market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the OTC drugs market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global OTC drugs market.

Various opportunities available for the other competitors in the OTC drugs market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current OTC drugs market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for OTC drugs market growth in the coming future?

Target Audience who can be benefited from this Over the Counter Drugs Market Report Study

OTC drugs products providers

Research organizations and consulting companies

OTC drugs-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and traders dealing in OTC drugs

Various end users who want to know more about the OTC drugs market and latest technological developments in the OTC drugs market.

Frequently Asked Questions for Over the Counter Drugs Market:

1. What are OTC Drugs?

Over-the-counter (OTC) drugs are essentially non-prescription drugs which can be obtained by consumers without any prescription from healthcare professionals. These drugs are also regulated by the concerned regulatory authorities and are efficient and safe to use.

2. What is the market for Global OTC Drugs?

The global over-the-counter (OTC) drugs market was valued at USD 151.15 billion in 2021, growing at a CAGR of 5.93% during the forecast period from 2022 to 2027 to reach USD 213.08 billion by 2027.

3. What are the drivers for Global Over-The-Counter Drugs Market?

The OTC drugs market is witnessing an explosion in product demand due to numerous reasons such as the surge in the prevalence of different indications resulting in pain leading to growing demand for analgesics. Moreover, growing prevalence of gastrointestinal issues is another factor contributing in the growth of OTC gastrointestinal drugs. Besides the factors stated above, the rapid switch from prescription to OTC status of various medication is also expected to play a key role in establishing an upward growth trend in the OTC drugs market during the forecast period from 2022 to 2027.

4. Who are the key players operating in Global Over-The-Counter Drugs Market?

Some of the key market players operating in the OTC drugs market includes Johnson & Johnson Services Inc, BAYER AG, Novartis, sanofi-aventis U.S. LLC., Pfizer Inc, GlaxoSmithKline plc., Cipla Inc., Piramal Enterprises Limited, Duramed Pharmaceuticals, Inc, Glenmark Pharmaceuticals., Dr. Reddy's Laboratories, Innovus Pharmaceuticals, Inc., Teva Pharmaceutical Industries Ltd., Viatris Inc, Reckitt Benckiser Group PLC, Afaxys Pharma, LLC, FOUNDATION CONSUMER HEALTHCARE, Alcon Inc and others.

5. Which region has the highest share in Over-The-Counter Drugs market?

Among all the regions, North America is projected to amass the largest share in revenue generation in the OTC drugs market. Some of the factors responsible for the growth of the North America over the counter drugs market is the number of switches from Rx to OTC status for various drugs, growing preference of OTC drugs over prescription drugs, comparatively less stringent regulatory guidelines for marketing approvals among others.

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