

OTC ANALGESICS, COUGH, COLD AND FLU REMEDIES – GERMANY – 2023

As the category emerges stronger from the turbulent pandemic years, brands are set to further make their mark with a preventative approach to health concerns and remedies designed for women to address gender biases.



Hannah Sandow, Health & Wellbeing Principal Analyst, Germany



OTC Analgesics, Cough, Cold And Flu Remedies - Germany - 2023

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation and supply chain issues on OTC analgesics and cough, cold and flu remedies
- Experience of pains and ailments and treatments sought, covering OTC and homemade remedies, among others
- Usage of OTC pain and cough, cold and flu remedies and the most important factors guiding consumers when choosing such remedies
- Consumer behaviours towards pain and cough, cold and flu management
- Launch activity and innovation, discussing formats and claims in OTC pain and cough, cold and flu remedies
- Market size and forecast for OTC analgesics and OTC cough, cold and flu remedies



As the category emerges stronger from the turbulent pandemic years, brands are set to further make their mark with a preventative approach to health concerns and remedies designed for women to address gender biases.

Overview

68% of Germans agree that own-label pain relief remedies are **as effective** as branded ones; own-label cough, cold and flu remedies rank similarly (66%). In economically challenging times, own labels have **a clear opportunity** to leverage consumers' trust and strengthen their position. However, with new product development for OTC pain and ailment remedies being largely dominated by brands, it will require more attention from own labels.

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OTC pain and ailment remedies are purchased mostly due to **acute needs**, largely protecting the category from savvy shopping behaviours adopted during the cost-of-living crisis, like trading down to cheaper own-label products. Given Germans' trust in own-label brands, branded products should aim to prove their value by tapping into **additional benefits**, such as sleep-enhancing remedies that support a faster recovery.

While OTC remedies are Germans' most common choice to treat their pain and ailments, Gen Z's preference for homemade remedies poses another threat to brands. For instance, Gen Zs who experience pain, are **less likely to use OTC pain remedies** (58% vs 68% of Gen X) and more likely to use homemade remedies (50% vs 25% of Gen X).

Aligning with Gen Z's interest in a soft approach and alternative medicine, brands can tackle this challenge by launching natural remedies or working with alternative practitioners, such as [Nurofen's](#) collaboration with **neuroscientists** to unveil music's pain-relieving potential.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for OTC analgesics and cough, cold and flu remedies

Market context

- The impact of the economy on OTC analgesics and cough, cold and flu remedies
- Common illnesses spike post-COVID-19
 - Graph 1: incidence of reported influenza cases per year, 2018-22
- Germans' health in decline

Mintel predicts

- Market size & forecast for OTC analgesics and antipyretics
- Minor growth to be expected in the short term before stagnation sets in
- Stable outlook for OTC analgesics and antipyretics
- Market size & forecast for OTC cough, cold and flu remedies
- Turbulent years for OTC cough, cold and flu remedies predicted to settle in the long term
- Continued growth for OTC cough, cold and flu medication predicted to ease off in the long term

Opportunities

- Stand out with stress-relief claims
- Create more excitement in topical pain relief
- Take a closer look at parents' needs
 - Graph 2: experience of cough, cold, flu in the last 12 months, by any children, 2023
- Five in 10 Germans are interested in pain and ailment remedies with additional benefits

MARKET DRIVERS

The German economy

- Stagnation follows a technical recession
 - Graph 3: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure

The impact of the economy on OTC analgesics and cough, cold and flu remedies

- Rising prices and supply chain issues disrupting the offer of OTC remedies
- OTC pain and ailment remedies largely protected from reduced spending

Public health

- Common illnesses spike post-COVID-19
 - Graph 4: incidence of reported influenza cases per year, 2018–22
- Increased uptake of flu vaccinations after global health crisis
- Prevent sedentary lifestyles and obesity to manage pain
- Acknowledge the close link between mental health and pain

Demographic changes

- Demand for OTC pain remedies grows alongside Germany's ageing population
- Falling birth rates potentially reducing demand for OTC cough, cold and flu remedies
 - Graph 5: index of live births, 2007–22

WHAT CONSUMERS WANT AND WHY

Experience of pains and ailments

- Body pain commonly experienced among all German generations
- Widen your focus
 - Graph 6: experience of pains/ailments in the last 12 months, 2023
- Be aware of back pain's diverse root causes
- Young Germans more likely to be battling headaches
 - Graph 7: experience of pain, by generation, 2023
- Women more likely to suffer from most pains
 - Graph 8: experience of pains/ailments in the last 12 months, by gender, 2023
- Multi-faceted origin of women's pain
- Address men's oral care issues with antibacterial properties

Pain relief used

- Explore alternative practices to engage with Gen Z who experience pain
- OTC pain remedies prove popular for head pain
 - Graph 9: pain relief used in the last 12 months, 2023
- Stand out with stress relief claims
- Take inspiration from body pain relief's merger with personal care
- Be bold and loud when advocating for women
- Midol is encouraging period pain sufferers to find comfort for their symptoms

Usage of OTC pain remedies

- Oral OTC pain remedies take the lead
 - Graph 10: usage of OTC pain remedies in the last 12 months, 2023
- Celebrating ibuprofen's all-rounder potential
- Tap into the potential of combination tablets or capsules
- Excite Baby Boomers with novel ingredients in topical pain remedies
 - Graph 11: usage of topical OTC pain remedies, by generation, 2023
- Stay on top of changing guidelines to show expertise on sports-related injuries

Factors in choosing OTC pain remedies

- OTC pain remedy users are most influenced by active ingredients
 - Graph 12: factors in choosing OTC pain remedies, 2023
- Cater to Germans' caffeine moderation trend
- Don't stop at the formula – multifunctional application crucial for topical pain relief
- Don't be generic – help period pain sufferers with targeted symptom claims
- Become a specialist in period care

Experience of ailments

- Common cough, cold and flu are making a comeback
- Help parents through their experience of coughs, colds and flus
 - Graph 13: experience of cough, cold, flu in the last 12 months, by any children, 2023

Treatments used for ailments

- Make OTC ailment remedies more enticing with cross-category collaborations
 - Graph 14: treatments used for ailments in the last 12 months, 2023
- Make Germans fight their coughs
- Make them fight

Usage of OTC cough, cold or flu remedies

- Unlock the potential of specialised cough, cold and flu remedies
 - Graph 15: usage of OTC cough, cold, or flu remedies in the last 12 months, 2023
- Make cough, cold and flu remedies a family affair

Factors in choosing OTC cough, cold and flu remedies

- Fast-acting claims take center stage
 - Graph 16: factors in choosing OTC cough, cold and flu remedies, 2023
- Provide prompt relief with proven claims to attract out-of-home workers
- Tweak well-known brands to appeal to natural health consumers
- Find your theme to expand your brand
- Help active ingredients in cough, cold and flu remedies get more recognition

- Graph 17: factors in choosing OTC medication, by type of treatment, 2023
- Become Germans' one-stop solution for colds or flus...
 - Graph 18: repertoire of OTC cough, cold and flu remedies used in the last 12 months, 2023
- ...by showing off what active ingredients in ailment remedies can do

Behaviours towards pain, cough, cold and flu management

- Germans display a great level of trust in own-label pain and ailment remedies
 - Graph 19: behaviours towards pain, cough, cold and flu management, 2023
- Leverage Germans' trust in own label's health products to strengthen their position
- Tie prevention and pain relief together with on-the-go topicals to attract Gen Z
- Fast-track Germans' recovery with added immune support
- Derive inspiration from international markets to offer Germans additional benefits
- Prepare for Germans' interest in technology for pain and ailment management

LAUNCH ACTIVITY AND INNOVATION

- New product development for pain and ailment remedies in need of more attention
 - Graph 20: NPD in healthcare, by top three sub-categories, 2018-23

Pain relief

- Respond to pain remedy users' demand for fast relief with liquid formats
 - Graph 21: NPD in pain relief by format type, 2018-23
- Examples of pain relief NPD in liquid or liquid-filled capsules
- Accelerate growth with time and speed claims
 - Graph 22: NPD in pain relief by top ten claims*, 2018-23
- To be active...
- ...or not to be active

Decongestive, cough, cold and flu relief

- Exhaust remaining potential for cold and flu tablets or capsules
- Drive new format innovation by targeting convenience
- Botanical and herbal claims in the lead
 - Graph 23: NPD in decongestive, cough, cold and flu relief by top ten claims*, 2018-23
- Go beyond eco-friendly packaging
- Give Germans some rest
- Spice up cough, cold and flu remedies with new flavours
 - Graph 24: NPD in ingestible decongestive, cough, cold, flu liquids and lozenges, by flavour, 2023
- Target families by drawing inspiration from emerging flavours in baby juices

Advertising and marketing activity

- tetesept blends self-care and ailment recovery
- Aspirin offers quick relief at the first signs of cold
- Grippostad helps Germans get through their flu with free movie streaming
- Sleep is the best medicine

MARKET SIZE, SEGMENTATION AND FORECAST

- Turbulent years for cough, cold and flu remedies
 - Graph 25: retail value sales of OTC analgesics, cough, cold and flu remedies, 2018–22
- Positive growth for analgesics and cough, cold and flu remedies in 2022
- Stable outlook for OTC analgesics and antipyretics
- Growth to continue in the short term
- Growth levels for OTC pain relief expected to slow down mid to long term
- Continued growth for OTC cough, cold and flu medication is predicted but will ease off long term
- Continued growth for cough, cold and flu remedies
- Value growth to ease off mid term before stagnation sets in the long term

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size – OTC analgesics and antipyretics medication
- Market forecast and prediction intervals – OTC analgesics and antipyretics
- Market size – OTC cough, cold and flu medication
- Market forecast and prediction intervals – OTC cough, cold and flu medication

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