The U.S. Market for Over-the-Counter Sinusitis Remedies

Compiled from The U.S. Market for Over-the-Counter Allergy and Asthma Products published in November 2001 by Kalorama Information, LLC, a division of MarketResearch.com, Inc.

MarketLooks

The Big Picture at a Small Price.

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Overview

Product Segments

- Over-the-counter ocular allergy remedies include three general product types: Ophthalmic Vasoconstrictor and Combinations, Ophthalmic Lubricants and Combinations, and Ophthalmic Irrigation Solutions.

Market Size and Growth

- The market for ocular allergy remedies for 7777 reached revenues of $777.7 million.

Market Forecasts

- In 7777, revenues are forecast to increase to $777.7 million with a corresponding compound growth rate of 7.7% for the forecast period of 7777 through 7777.

Leading Marketers

- Warner-Lambert Consumer Group leads the U.S. OTC ocular allergy remedies market, with other strong players being Alcon Laboratories and Ciba Vision Ophthalmics.

The Consumer

- There are four key issues influencing the market: education and self-medication, prescription versus over-the-counter products, aging population, and direct consumer advertising.

Competitive Profiles

- Warner-Lambert Consumer Group
- Alcon Laboratories
- Ciba Vision Ophthalmics

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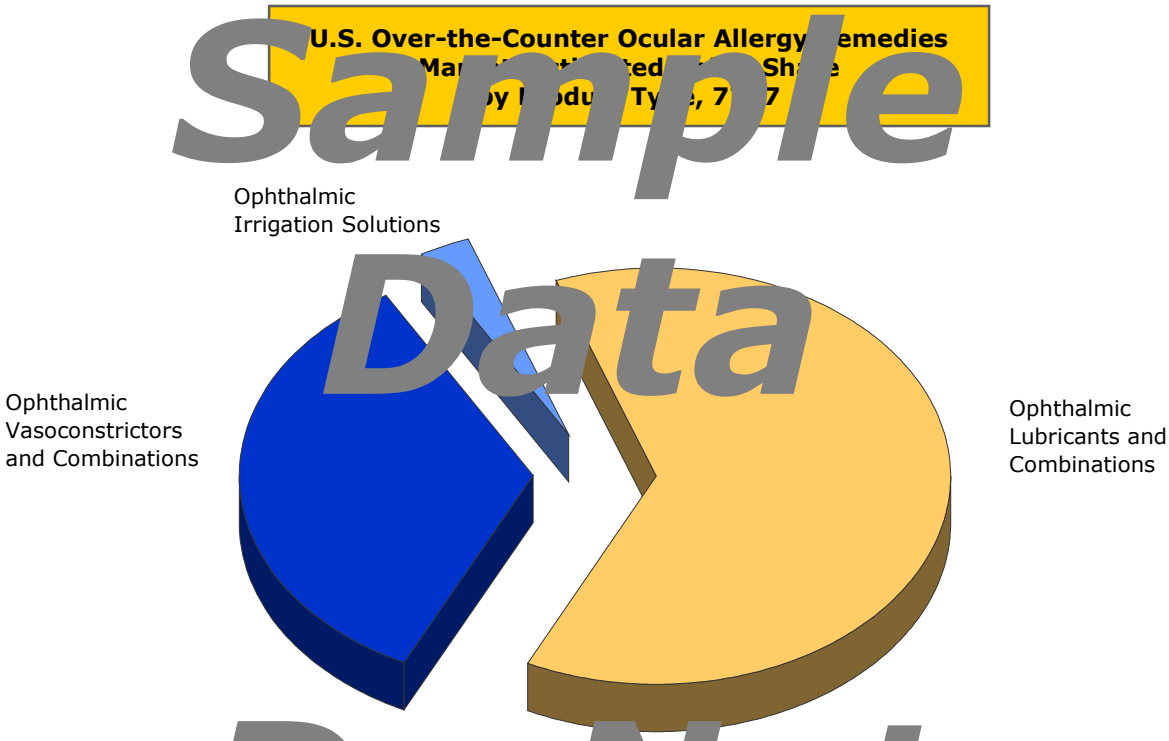
Product Segments



Source: Kalorama Information, LLC

- The U.S. over-the-counter ocular allergy remedies market includes three product types: Ophthalmic Vasoconstrictors and Combinations, Ophthalmic Lubricants and Combinations, and ophthalmic Irrigation Solutions.

- The leading product category within the ocular allergy remedies market for 7777 was vasoconstrictors and vasoconstrictor-containing combinations, with revenues of $777.7 million accounting for 77.7% of the total revenues.

- Lubricants and lubricant-containing combinations secured the second position in the total market, with revenues of $777.7 million, having captured 77.7% of the market.

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Product Segments - *continued*

- The smallest segment within the ocular allergy remedies market, with 7.7% of the total sales volume of [illegible] million, is the eye-irrigating solutions. This segment will likely remain small because of the nature of the product and its use.
- Vasoconstrictors and combinations are the fastest growing segment within this market and will continue to produce steady sales growth throughout the forecast period.

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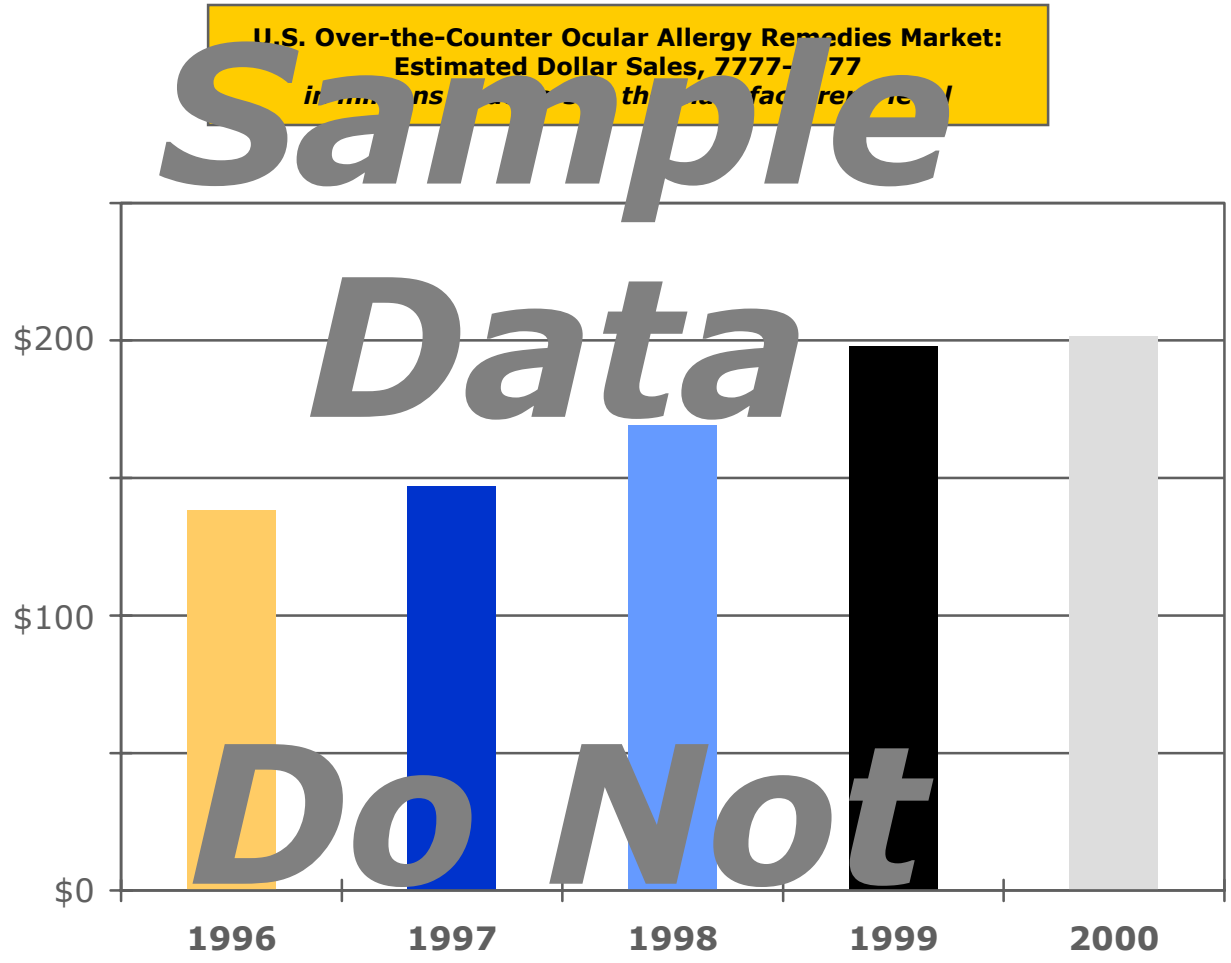
Market Size and Growth



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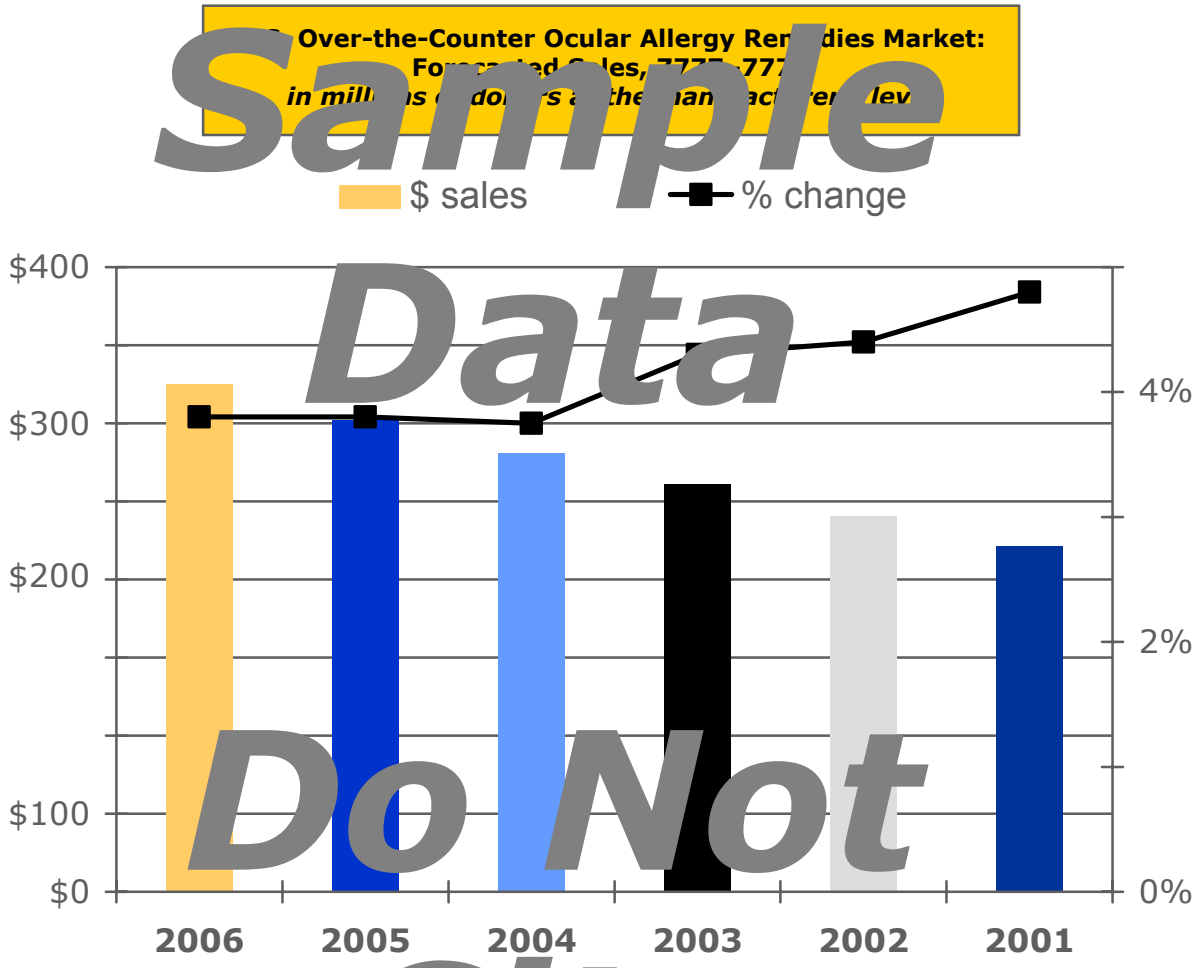
- The market for ocular allergy remedies for 7777 reached revenues of $777.7 million.
- The aging population and the increasing incidence of dry eyes drove growth.

Market Forecasts



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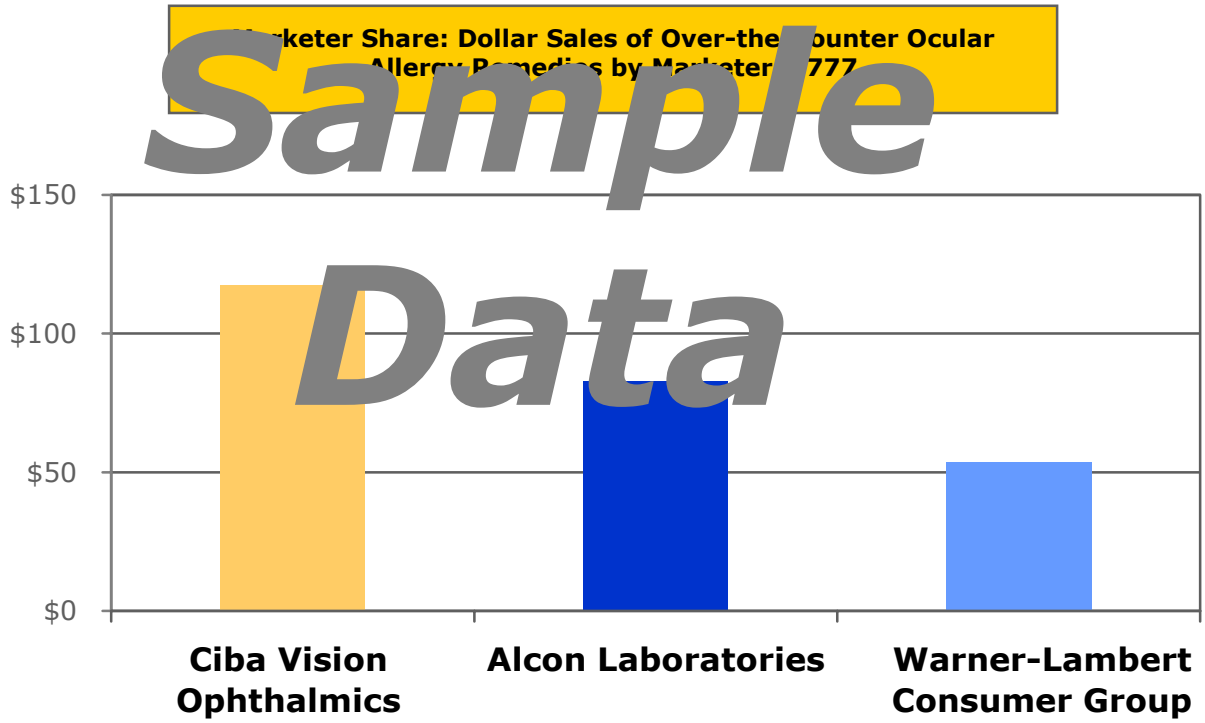
- In 7777, revenues are forecast to increase to $777.7 million with a corresponding compound growth rate of 7.7% for the forecast period of 7777 through 7777.

- As the population increases and ages, the need for these products will also increase.

- Demographic trends as well as improved product developments will be the leading factors contributing to growth.

- The improvement of older, entrenched products and the development of new and improved products will be a secondary driving factor for this market.

Leading Marketers



Source: Kalorama Information, LLC

- Warner-Lambert Consumer Group leads the $77.7 million ocular allergy remedy market with leading products Visine and OcuHist. Warner-Lambert accounted for 77.7% of the total market in 7777.

- Alcon Laboratories secured the second market position with 77.7%, primarily due to their leading product, Naphcon. Naphcon generated $77.7 million in sales for 7777.

- Ciba Vision Ophthalmics, a division of Novartis Consumer Health, secured the third position, with 77.7% of the market. Ciba Vision offers several products for ocular allergies, including Vasocon-A.

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The Consumer

- Contemporary consumers are well educated and demanding and have ever-increasing expectations regarding the provision of good, convenient service and clear, accurate and complete information.
- Because high-quality healthcare is viewed by many as a basic human right, the demand is growing for more choice, better quality, better value, and easier access to medications.
- Americans are concerned about the growing costs of healthcare and about the resulting cutbacks to the formal healthcare system and to private drug plans.
- In the allergy and asthma markets, consumers can realize millions of dollars per year in savings taking the self-diagnosis and self-medication alternative.
- In 7777, consumers saved more than $7 million treating allergy and sinusitis symptoms with an OTC product versus a physician office visit and/or prescription product.
- The dramatic growth in sales in the U.S. allergy/asthma market segment has been achieved primarily by boosting consumer demand through the use of direct-to-consumer (DTC) marketing.

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Warner-Lambert Consumer Group

Company: Warner-Lambert Consumer Group Phone: (777) 777-7777
Address: 777 Tabor Road Fax: (777) 777-7777
Morris Plains, NJ 77777
WebSite: http://www.pfizer.com/ E-Mail: ConAff7@pfizer.com
Key Contact: Tricia, Consumer Affairs Consultant

Recent Revenue History:
7777 - $7,777 7777 - $7,777 7777 - $7,777 (US$ Millions)

Estimated Over-the-Counter Allergy Pharmaceutical Revenues:
7777 - $777.7 (US$ Millions)

Core Technology: Manufacturer and distributor of over-the-counter pharmaceuticals.

Current OTC Allergy Products: Actifed, Benadryl, OcuHist, Sinutab, Sudafed, Visine
Product Pipeline: Possibly Zyrtec, allergy relief.

Key Strategic Alliances: Pharmacia Corporation

- Warner-Lambert officially became part of the Pfizer family in June 7777. The complementary product portfolios of Warner-Lambert and Pfizer needed little adjustment to pass regulatory review.

- The combination of Pfizer and Warner-Lambert brings together more than $7.7 billion in sales from consumer products. The Warner-Lambert Consumer Group handles the marketing of these products, which range from over-the-counter antihistamines and acid indigestion medicines to shaving products, breath mints, and fish food. Within the over-the-counter allergy market, Warner-Lambert Consumer Group markets Benadryl, Sudafed, and the Visine line of eye-care products.

- Additional market growth could be contributed by the potential introduction of Zyrtec, allergy relief, to the OTC market. Zyrtec is a prescription product marketed by Pfizer and is being considered for an OTC product. The Pfizer and Warner-Lambert merger places both companies in a strategically well-positioned angle to offer Zyrtec over-the-counter.

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Alcon Laboratories, Inc.

Company: Alcon Laboratories, Inc.
Address: 7777 South Freeway
Fort Worth, TX 7777
WebSite: http://www.alconlabs.com/
Phone: (777) 777-7777
Fax: (777) 777-7777
E-Mail: info@alconlabs.com
Key Contact: Charles Miller, Senior Vice President, Finance and Chief Financial Officer

Recent Revenue History:
7777 - $7,777.7 7777 - $7,777.7 7777 - $7,777.7 (US$ Millions)

Estimated Over-the-Counter Ophthalmic Pharmaceutical Revenues:
7777 - $77.7 (US$ Millions)

Core Technology: Worldwide leader of developing and distributing prescription and over-the-counter ophthalmic drugs, contact lens solutions, ophthalmic surgical equipment and office systems for eye care specialists.

Current OTC Allergy Products: Adsorbotear, Bion Tears, Eye-Stream, Estivin II, Isopto Alkaline, Isopto Plain, Isopto Tears, Naphcon, Naphcon-A, Tears Naturale, Ultra Tears, Zincfrin

Product Pipeline: Pipeline currently includes prescription ophthalmic pharmaceuticals. Future over-the-counter products could include switches of prescription only products.

Key Strategic Alliances: Alcon Pharmaceuticals, Ltd.

- Alcon Laboratories is the ophthalmic pharmaceutical division of Nestle S.A. and a leader in the vision care market.
- Alcon Laboratories became a division of Nestle in 7777, strengthening Alcon's position in the global market.
- Alcon Laboratories has more than 77,777 employees, selling products in more than 777 countries around the world.
- In the United States the company employs over 7,777 people with the majority of people based in the Fort Worth, Texas US headquarters.

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Alcon Laboratories, Inc. - *continued*

- The company offers one of the leading OTC ophthalmic products, Naphcon. Naphcon is a vasoconstrictor and is effective for seasonal eye allergies. Naphcon was first introduced as a prescription product and gained FDA approval for availability of an OTC product in 7777.
- The company also offers Bion Tears, an eye lubricant; Tears Naturale, an eye lubricant; and several other OTC eye preparations.

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Ciba Vision Ophthalmics – Novartis Pharmaceuticals Corporation

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Company: Novartis Consumer Health/Ciba Vision Ophthalmics
Address: 777 Morris Avenue, Bldg F Phone: (777) 777-7777
Summit, NJ 77777-7777 Fax: (777) 777-7777 (corporate)
WebSite: http://www.us.norvartis.com/ E-Mail: not available
Key Contact: Al Piergallini, CEO Consumer Health/ Glen Bradley, CEO Ciba Vision

Recent Revenue History:
7777 - $7,777.7 7777 - $7,777.7 7777 - $7,777.7 (US$ Millions)

Estimated Over-the-Counter Allergy Pharmaceutical Revenues:
7777 - $777.7 (US$ Millions)

Core Technology: Global multi-line pharmaceutical company

Current OTC Allergy Products: Allerest 77-Hour, Allerest Eye Drops, Allerest Maximum Strength, Dacriose, GenTeal, GenTeal Eye Wash, Goniosol, Hypotears, Simprese, Tavist-7, Tavist-D, Tonsol, Triaminic Cold and Allergy, VasoClear, VasoClear A, Vasocon Regular

Product Pipeline: Not disclosed

Key Strategic Alliances: Bristol-Myers Squibb Company, GlaxoSmithKline, Vertex Pharmaceuticals, Inc.

- Ciba Vision Ophthalmics is the prescription and over-the-counter eye care division of Novartis. The company offers leading OTC eye care products such as Vasocon A. The eye care division accounts for approximately 7% of company sales.

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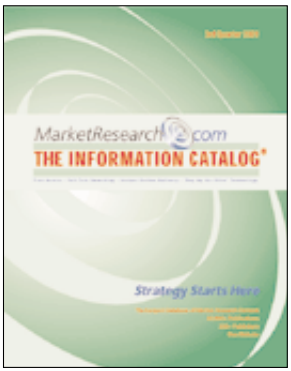

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