

SOUTH AFRICAN COUGH, COLD AND FLU INDUSTRY INSIGHTS REPORTS 2025

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COMPANY OVERVIEW



Insight Survey is a South African, boutique market research agency with more than 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

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QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS



Competitor pricing research



Store visits and store checks



Competitor interviews



Customer interviews



Company website analysis



Governmental held records

HEALTHCARE INDUSTRY REPORT CLIENTS

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



REPORT OVERVIEW

The **South African Cough, Cold and Flu Remedies Industry Landscape Report (97 pages)** provides a dynamic synthesis of industry research, examining the local and global **Cough, Cold and Flu Remedies Industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, retail, and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Cough, Cold and Flu Remedies Industry Section:

- What are the current market dynamics of the Global Cough, Cold and Flu Remedies industry?
- Which are the key markets within the Global Cough, Cold and Flu Remedies industry?
- What are the latest Global Cough, Cold and Flu Remedies industry trends, innovation and technology, drivers, and challenges?

For the South African Cough, Cold and Flu Remedies Industry Section:

- What are the current market dynamics (market size, market value, market volumes): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Cough, Cold and Flu Remedies industry trends, innovation and technology, drivers, and challenges?
- What are Porter's Five Forces shaping the South African Cough, Cold and Flu market?
- What is the Steep analysis of the South African Cough, Cold and Flu market?

For the South African Cough, Cold and Flu Remedies Manufacturer & Distributor Section:

- Which are the key manufacturing and distributor players in the South African Cough, Cold and Flu Remedies industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Cough, Cold and Flu Remedies brands and products do the respective companies manufacture/distribute?

For the South African Cough, Cold and Flu Remedies Retail and Pricing Analysis Section:

- Which are the key retail players (retail house brands) in the South African Cough, Cold and Flu Remedies industry?
- What are the prices of popular OTC Cough, Cold and Flu Remedies brands/products across South African retail pharmacies?

SCREENSHOTS FROM REPORT

97-page report filled with detailed charts, graphs, and insights



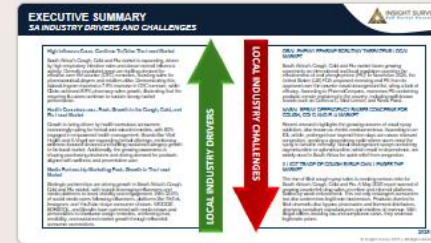
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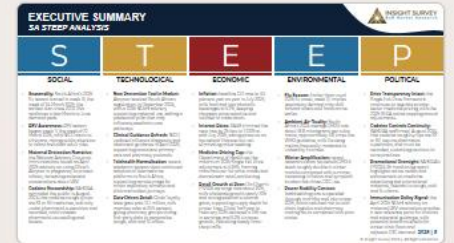
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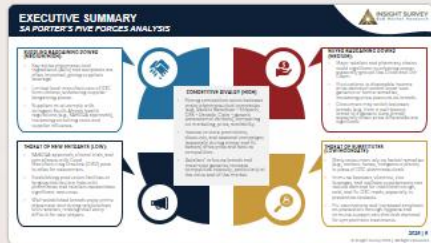
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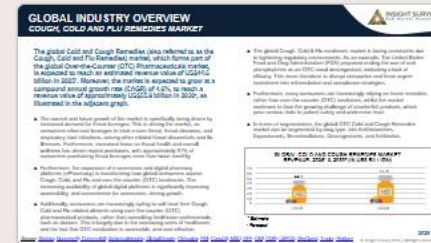
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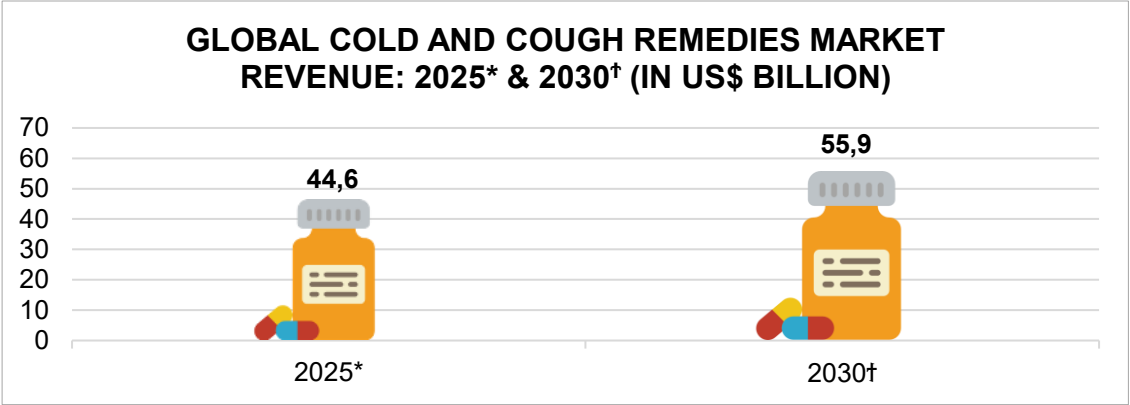


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The global Cold and Cough Remedies (also referred to as the Cough, Cold and Flu Remedies) market, which forms part of the global Over-the-Counter (OTC) Pharmaceuticals market, is expected to reach an estimated revenue value of US\$44.6 billion in 2025*. Moreover, the market is expected to grow at a compound annual growth rate (CAGR) of 4.6%, to reach a revenue value of approximately US\$55.9 billion in 2030†, as illustrated in the adjacent graph.

- The current and future growth of the market is specifically being driven by increased demand for throat lozenges. This is driving the market, as consumers often use lozenges to treat a sore throat, throat diseases, and respiratory tract infections, among other related throat discomforts and flu illnesses. Furthermore, increased focus on throat health and overall wellness has driven repeat purchases, with approximately 51% of consumers purchasing throat lozenges more than twice monthly.
- Furthermore, the expansion of e-commerce and digital pharmacy platforms (ePharmacy) is transforming how global consumers access Cough, Cold, and Flu and over-the-counter (OTC) treatments. The increasing availability of global digital platforms is significantly improving accessibility, and convenience for consumers, driving growth.
- Additionally, consumers are increasingly opting to self-treat their Cough, Cold and Flu related ailments using over-the-counter (OTC) pharmaceutical products, rather than consulting healthcare professionals, such as doctors. This is largely due to the increasing costs of healthcare, and the fact that OTC medication is accessible, and cost-effective.

- The global Cough, Cold & Flu medicines market is facing constraints due to tightening regulatory environments. As an example, The United States Food and Drug Administration (FDA) proposed ending the use of oral phenylephrine as an OTC nasal decongestant, indicating a lack of efficacy. This move threatens to disrupt companies and force urgent investment into reformulation and compliance strategies.
- Furthermore, many consumers are increasingly relying on home remedies rather than over-the-counter (OTC) medicines, whilst the market continues to face the growing challenge of counterfeit products, which pose serious risks to patient safety and undermine trust.
- In terms of segmentation, the global OTC Cold and Cough Remedies market can be segmented by drug type, into Antihistamines, Expectorants, Bronchodilators, Decongestants, and Antibiotics.



* Estimate
† Forecast

SAMPLE FROM REPORT

SA TRENDS, INNOVATION AND TECHNOLOGY, DRIVERS AND CHALLENGES

TRENDS

LOZENGES GAIN TRACTION FOR CONVENIENT, FAST RELIEF

- South African consumers are increasingly choosing lozenges as a convenient, on-the-go solution for Cough, Cold, and Flu relief.
- These products offer relief for throat discomfort and symptom management, and target fast-acting relief during flu season.
- Demand is driven by consumers seeking efficacy, convenience, and flavour variety in managing flu-related discomfort.
- This trend highlights lozenges' growing role as a preferred format in the South African Cough, Cold, and Flu market.



INNOVATION AND TECHNOLOGY

CEPACOL EFFERVESCENT



- Cepacol introduced a new raspberry-flavoured fizzy effervescent product in July 2025, adding to its sore throat treatment range.
- The new flavour expands the appeal of the brand's trusted multi-action lozenges and effervescent formats that help to relieve cold and flu symptoms.
- The new product is part of Adcock Ingram's broader "Winter Warrior" campaign promoting proactive sore throat defence.
- The new product is positioned to appeal to health-conscious consumers seeking both taste and fast-acting relief.

DRIVERS

HIGH INFLUENZA CASES CONTINUE TO DRIVE THE LOCAL MARKET

- South Africa's Cough, and Cold market is experiencing growth, driven by the country's high prevalence of respiratory infections.
- This rise in infection rates is translating directly into sales growth for pharmaceutical players. For example, Adcock Ingram reported that increased demand for cold and flu medication boosted its annual performance, with OTC turnover increasing by 7.9% and supporting a 6% overall turnover increase.
- Retailers are also benefiting from high numbers of influenza cases. Clicks Group highlighted strong pharmacy sales growth of 8.9%.
- Therefore, these factors illustrate that recurring influenza cases are driving South Africa's Cough Cold and Flu market, delivering consistent revenue growth for both manufacturers and retailers.



CHALLENGES

ILLICIT TRADE OF COUGH SYRUP CHALLENGES THE MARKET



- The rise of illicit cough syrup sales is creating serious risks for South Africa's Cough, Cold and Flu. A May 2025 report warned of growing counterfeit drug sales on online and informal platforms, fuelled by weak enforcement. This not only endangers consumers but also undermines legitimate businesses.
- Several incidents in 2025 illustrate the scale of the problem. In July, local authorities intercepted R819,000 worth of cough syrup being smuggled into Zimbabwe. In March, at the Beitbridge border, traffickers concealed BronCleer and Benylin syrups under a coffin to evade detection. Additionally, a Sasolburg couple was arrested in August for illegally selling schedule-5 cough syrup (Painagon) without a licence.
- As such, products diverted to illicit channels bypass pharmacies and licensed distributors, depriving compliant manufacturers and retailers of revenue.

SAMPLE FROM REPORT

ADCOCK INGRAM: COMPANY NEWS



Adcock Ingram Delisted from the JSE Following the Acquisition of Natco Pharma

In July 2025, Indian pharmaceutical company Natco Pharma, acquired a significant stake in Adcock Ingram for R4 billion. The offer of R75 per share gave Natco Pharma a 35.75% shareholding in the company, leading to Adcock Ingram delisting from the Johannesburg Stock Exchange. Furthermore, the deal, valued at R12 billion, represents a strategic partnership with Bidvest. *(23 July 2025)*



Cepacol Hosts 'The Voice of Cepacol' Competition

In June 2025, Cepacol, an Adcock Ingram brand, hosted its 'The Voice of Cepacol' competition, highlighting its Cough, Cold and Flu product range. To enter, consumers were encouraged to click the link provided on the Instagram post and vote for their favourite artist, to stand a chance to win a share of R50,000 in instant prizes. *(20 June 2025)*



Cepacol Announces the Launch of its New Effervescent Variant in Raspberry Flavour

In March 2025, Cepacol, an Adcock Ingram brand, announced the launch of its new effervescent variant in raspberry flavour. More specifically, this product is formulated to provide comprehensive, multi-symptom relief, targeting Coughs, Colds, and Flu while also supporting overall immune health, helping to soothe discomfort and support recovery. *(25 March 2025)*



Adcock Ingram Reports Revenue Decline Due to Consumer Spending

In March 2025, Adcock Ingram Holdings reported interim results below expectations, impacted by weak consumer spending. As a result, its share price dropped by 5.56% to R59.90, although it remained higher than the previous year, with its revenue declining by 1% to R4.71 billion, while gross profit and headline earnings per share falling by 9%, reaching 265.5 cents. *(20 March 2025)*



Adcock Ingram Shareholders Review CEO's Compensation Amid Strong Growth

In November 2024, Adcock Ingram shareholders were expected to review Chief Executive Officer (CEO) Andy Hall's R17 million compensation, which was 397% above the industry average. However, shareholders remained focused on the company's growth, noting a 12% increase in earnings per share (EPS) and 57% shareholder returns, likely maintaining his salary level. *(13 November 2024)*



Adcock Ingram Reports Strong Financial Results

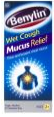
In August 2024, Adcock Ingram reported strong financial results, with turnover increasing by 6% to R9.6 billion and trading profit increasing by 4% to R1.2 billion. Headline earnings per share (HEPS) increased by 10% to 617 cents, while total dividends also increased by 10% to 275 cents per share. In addition, the company executed a share buyback of 6.0 million shares. *(22 August 2024)*



adcock ingram

SAMPLE FROM REPORT

COUGH, COLD AND FLU REMEDIES PRICING ANALYSIS

BRAND AND SIZE						
Andolex-C Lozenges		16 Lozenges	R99.99	R99.99	R99.99	R115.95
Andolex-C Spray		30ml	R134.00 (On Promotion)	R146.99	N/A	N/A
Benylin 4 Cough Liquid		100ml	R110.00 (On Promotion)	R109.99	R109.99	N/A
Benylin 4 Flu Liquid		200ml	R103.00 (On Promotion)	R111.99	R117.99	N/A
Benylin 4 Flu Tablets		24 Tablets	R105.00	R86.99	N/A	N/A
Benylin Cough Lozenges		20 Lozenges	R59.99 (On Promotion)	R66.99	R59.99	R72.95
Benylin Mucus Relief Wet Cough		100ml	R74.99 (On Promotion)	R49.99	R74.99	R74.99

This pricing analysis was conducted at retail stores and supermarkets during w/c 11 August 2025.

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