CommerceIQ

INDUSTRY REPORT

CategoryIQ
Cold Medicine

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Executive summary

Our CategoryIQ reports unpack the latest market trends from US Amazon data at the category level. These exclusive insights help our customers understand the category and competitive dynamics influencing market growth, and how they can apply winning strategies to grow their brands across retailers, too.

Here's what we found is trending in Cold Medicine:

The Cold Medicine market grew by an average of 18% in Q4 vs. Q3 of 2024, signaling strong consumer demand heading into the winter months—with brands like Zicam and Vicks emerging as top performers.

Growing brand competition, particularly in top-performing themes like Extra Strength, underscores the need for promotional efforts and differentiated offerings. Meanwhile, consumers remain sensitive to pricing amid ongoing inflation concerns, opting for Cold Medicine products that won't break the bank.

3 Key insights

Targeted products are top performers

Shoppers gravitated toward functional themes, with Extra Strength dominating Drops at 37.3% share and Congestion Relief leading Sprays at 14.1% share

Price sensitivity continues to play a crucial role

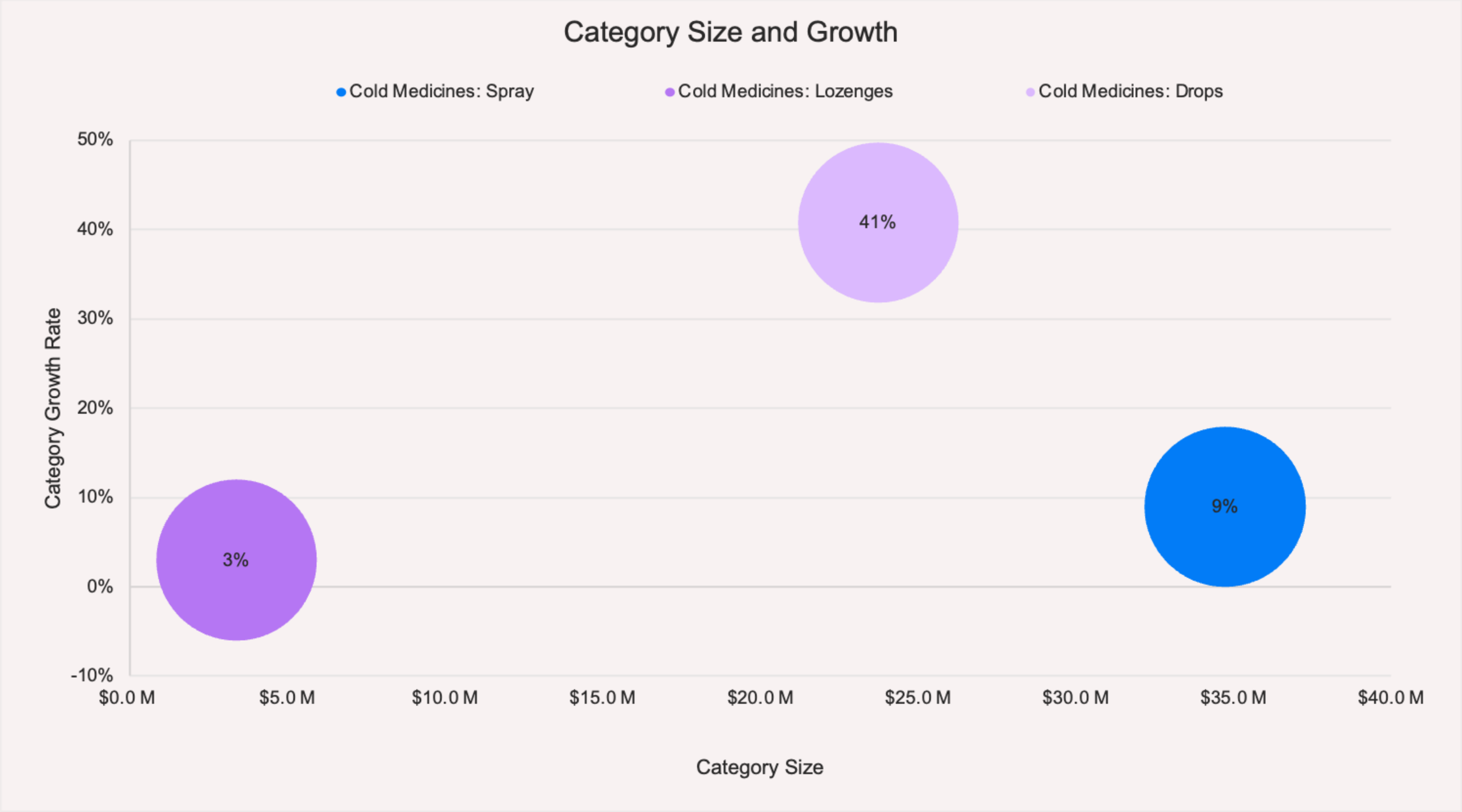
Mid-range price bands ($6–$15) accounted for over 70% of unit sales across segments

Product innovation offers untapped potential

Emerging themes like Gluten-Free Lozenges are positioned to capture growth

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Sponsored SOV – proxy for ad spend

On average, categories have grown by 18%, indicating a positive market trend



Takeaway

- Cold Medicines: Drops, grew 41% from $17M to $24M
- Cold Medicines: Sprays and Lozenges segments saw 9% and 3% growth respectively

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Competitor Watch: Top Gainers and Losers

	Top Gainers		Top Losers	
Category				
Cold & Nasal Medicines: Drops	**Intake** 19.2% (7.0%)	**Zicam** 14.3% (5.0%)	**Breathe Right** 24.9% (-5.9%)	**Neilmed** 5.2% (-4.1%)
Cold & Nasal Medicines: Lozenges	**Traditional Medicinals** 7.2% (1.9%)	**Mucinex** 2.8% (1.8%)	**Kirkland Signature** 8.4% (-6.9%)	**Punintended** 0.1% (-1.0%)
Cold & Nasal Medicines: Spray	**Vicks** 7.6% (2.1%)	**Boogie** 2.5% (1.3%)	**Bayer** 2.6% (-3.1%)	**Flonase** 22.0% (-1.8%)

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Category Deep Dive

Cold Medicine:

1. Cold Medicines: Drops
2. Cold Medicines: Lozenges
3. Cold Medicines: Spray

The Commerce Playbook hasn't changed

But the key factors are more interconnected and dynamic

Category

Market Share = **Your Sales** ÷ **You + Competitor Sales**

Ecommerce P&L

Sales = **Traffic** × **Conversion** × **ASP**

Inputs to Optimize

Traffic	Conversion	ASP
Brand Strength	Content Quality	Pricing
Share of Voice	Out of stock Rate	Promotional Strategy
Assortment Strength	Consumer Sentiment	

Competitive Benchmarking – Top Brands in Cold Medicines: Drops

Breathe Right, market leader gains sales but loses market share despite lowering ASP

			Traffic			Pricing	
Brand	Market share	Sales	Brand Strength	Organic SoV	Sponsored SoV*	ASP	Promo Rate
Breathe Right	24.9% (-5.9%)	$5.9M (13.8%)	0.3% (0.0%)	0.3% (0.1%)	0.3% (0.1%)	$13.7 (-8.8%)	0.6% (-1.5%)
Intake	19.2% (7.0%)	$4.5M (122.3%)		0.0% (0.0%)	0.0% (0.0%)	$48.5 (3.3%)	
Zicam	14.3% (5.0%)	$3.4M (116.7%)	0.3% (0.1%)	1.1% (0.5%)	0.8% (0.5%)	$11.2 (3.4%)	50.2% (43.6%)
Navage	11.5% (-2.1%)	$2.7M (18.9%)		0.1% (0.1%)	0.6% (0.2%)	$35.3 (-0.8%)	
Neilmed	5.2% (-4.1%)	$1.2M (-20.8%)	0.4% (0.2%)	0.7% (0.3%)	0.2% (0.0%)	$15.7 (-0.3%)	
Clear Passage	3.1% (-0.9%)	$735.6K (8.8%)		0.0% (0.0%)	0.0% (0.0%)	$18.2 (-3.9%)	
Mucinex	2.2% (0.5%)	$531.5K (85.5%)		0.4% (0.2%)	0.7% (0.1%)	$11.6 (1.4%)	

Takeaway

- Intake gained market share (from 12.2% to 19.2%) in category Health & Wellbeing: Cold & Nasal Medicines: Drops
- Zicam saw the biggest promotion rate increase (from 0.57% to 50.22%) and gained market share (from 9.3% to 14.3%)

CommerceIQ

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Sponsored SOV – proxy for ad spend

Competitive Benchmarking – Top Brands in Cold Medicines: Spray

Vicks gains significant ground, with Amazon Basic Care losing share

			Traffic			Pricing
Brand	**Market share**	**Sales**	**Brand Strength**	**Organic SoV**	**Sponsored SoV***	**ASP**
Flonase	22.0% (-1.8%)	$15.0M (1.1%)	0.4% (0.0%)	1.1% (0.0%)	1.3% (-0.1%)	$28.2 (4.2%)
Xlear	8.5% (1.0%)	$5.8M (24.7%)	0.1% (0.0%)	0.4% (0.1%)	0.1% (0.1%)	$18.6 (1.9%)
Amazon Basic Care	8.3% (-1.0%)	$5.6M (-1.8%)	0.6% (0.2%)	0.7% (0.2%)	1.0% (0.2%)	$10.1 (-7.5%)
Vicks	7.6% (2.1%)	$5.2M (50.9%)	0.2% (0.1%)	1.0% (0.3%)	1.9% (1.2%)	$15.6 (3.8%)

Takeaway

- Vicks gained market share (from 5.5% to 7.6% - grew by 2.1%) in category Cold Medicines: Spray segment
- Amazon Basic Care's ASP decreased 10% from $11.17 to $10.05, moving away from the category ASP

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Sponsored SOV – proxy for ad spend

Competitive Benchmarking – Top Brands in Cold Medicines: Lozenges

Therabreath and Kirkland Signature lost share in Cold Medicine: Lozenges

			Traffic			Pricing	
Brand	**Market share**	**Sales**	**Brand Strength**	**Organic SoV**	**Sponsored SoV***	**ASP**	**Promo Rate**
Source Naturals	13.5% (-0.5%)	$924.9K (-0.4%)		0.1% (0.0%)	0.0% (0.0%)	$17.1 (-1.6%)	3.1%
Rescue	11.6% (-0.5%)	$795.5K (-0.9%)		0.0% (0.0%)	0.0% (0.0%)	$14.5 (4.4%)	0.1%
Tummy Drops	10.4% (0.5%)	$712.0K (8.3%)				$13.9 (-0.1%)	
Kirkland Signature	8.4% (-6.9%)	$575.7K (-43.3%)		0.2% (0.0%)	0.0% (0.0%)	$59.9 (-1.8%)	
Therabreath	1.1% (-0.2%)	$76.7K (-12.3%)	0.0% (0.0%)	0.1% (0.0%)	0.0% (0.0%)	$6.1 (0.8%)	

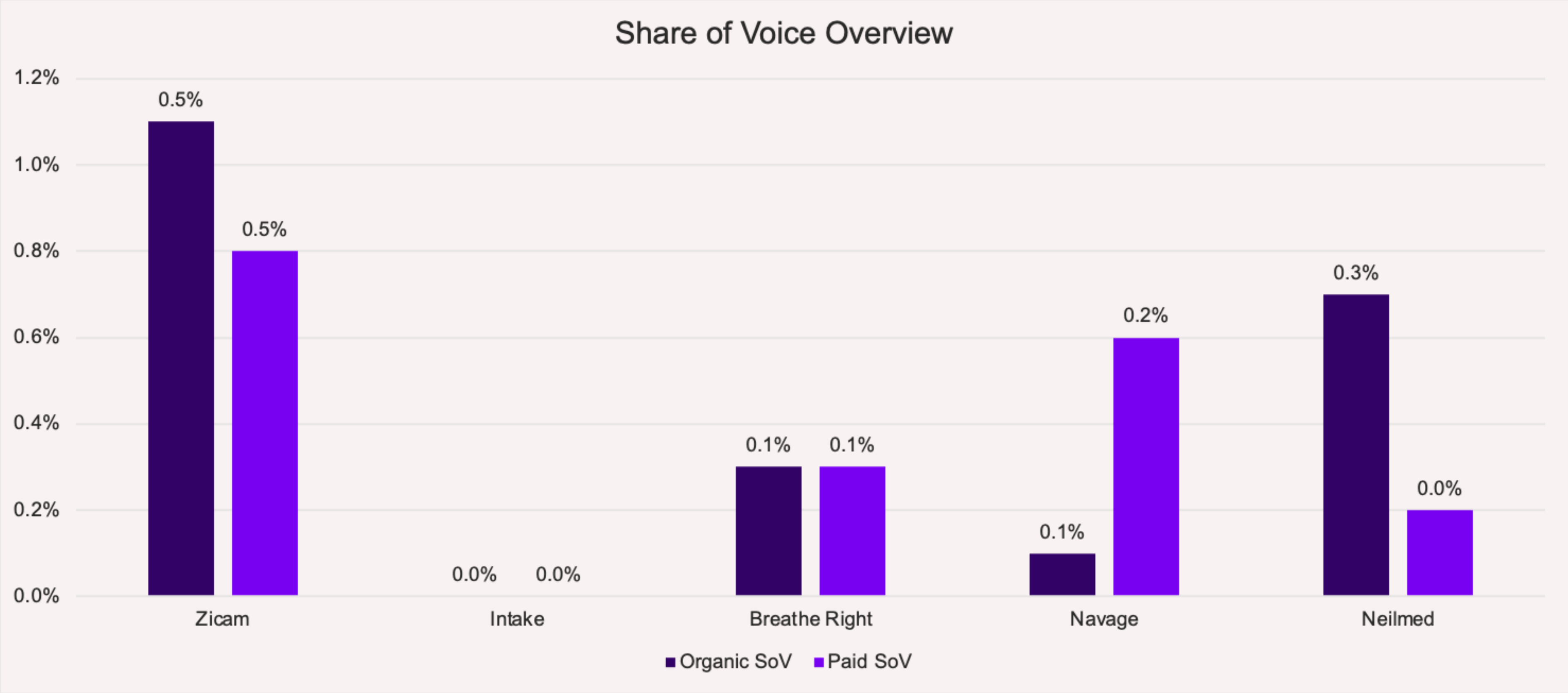
Takeaway

- Kirkland Signature lost market share (from 15.3% to 8.4% - declined by 6.9%) in category Cold Medicines: Lozenges
- Source Naturals saw no change in promotion rate, with a market share decline (from 14% to 13.5% - declined by 0.5%)
- Therabreath’s ASP is significantly lower than the category ASP

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Sponsored SOV – proxy for ad spend

Traffic Drivers – Share of Voice in Cold Medicines: Drops

Quarterly Business Insights for Cold Medicines: Drops



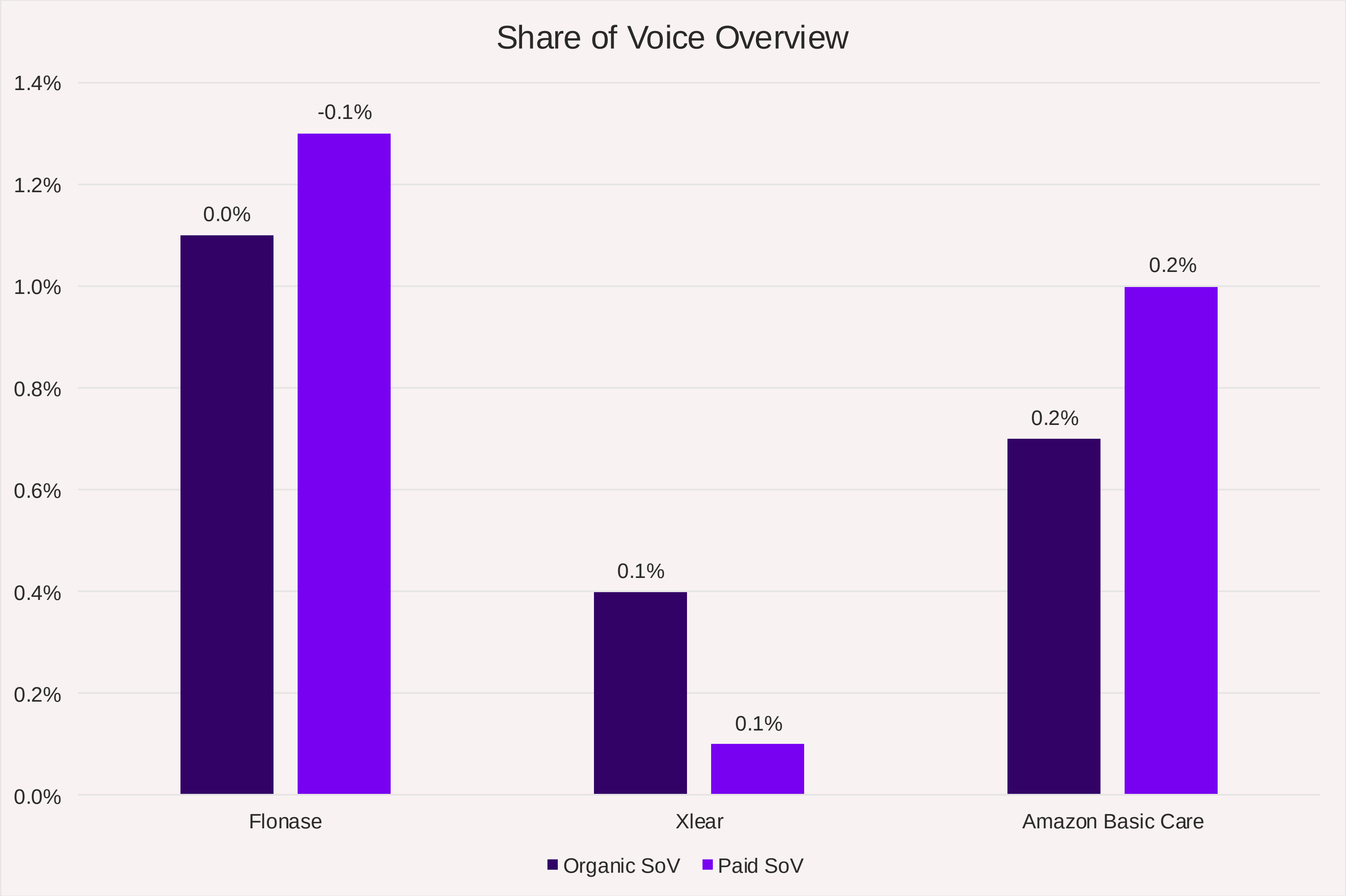
Takeaway

- Zicam shows the highest growth in organic presence (grew by 0.5%) and market share (14.27%)

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Traffic Drivers – Share of Voice in Cold Medicines: Spray

Brand Presence and Market Share Analysis



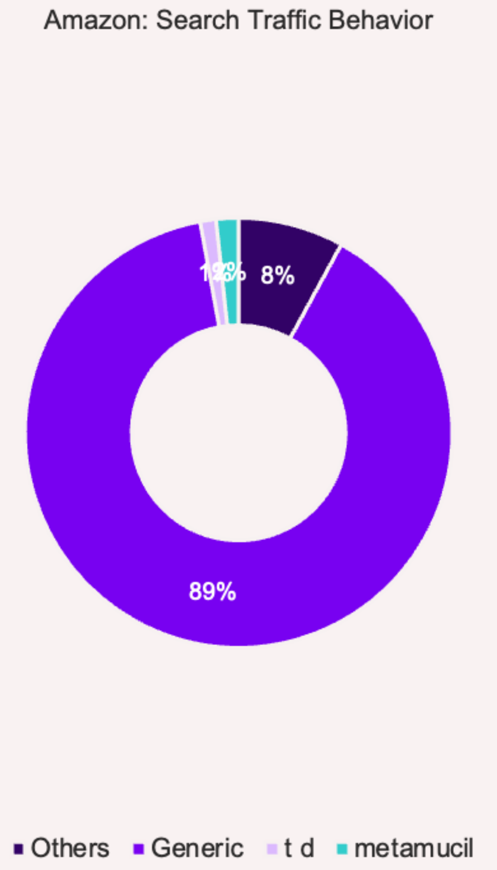
Takeaway

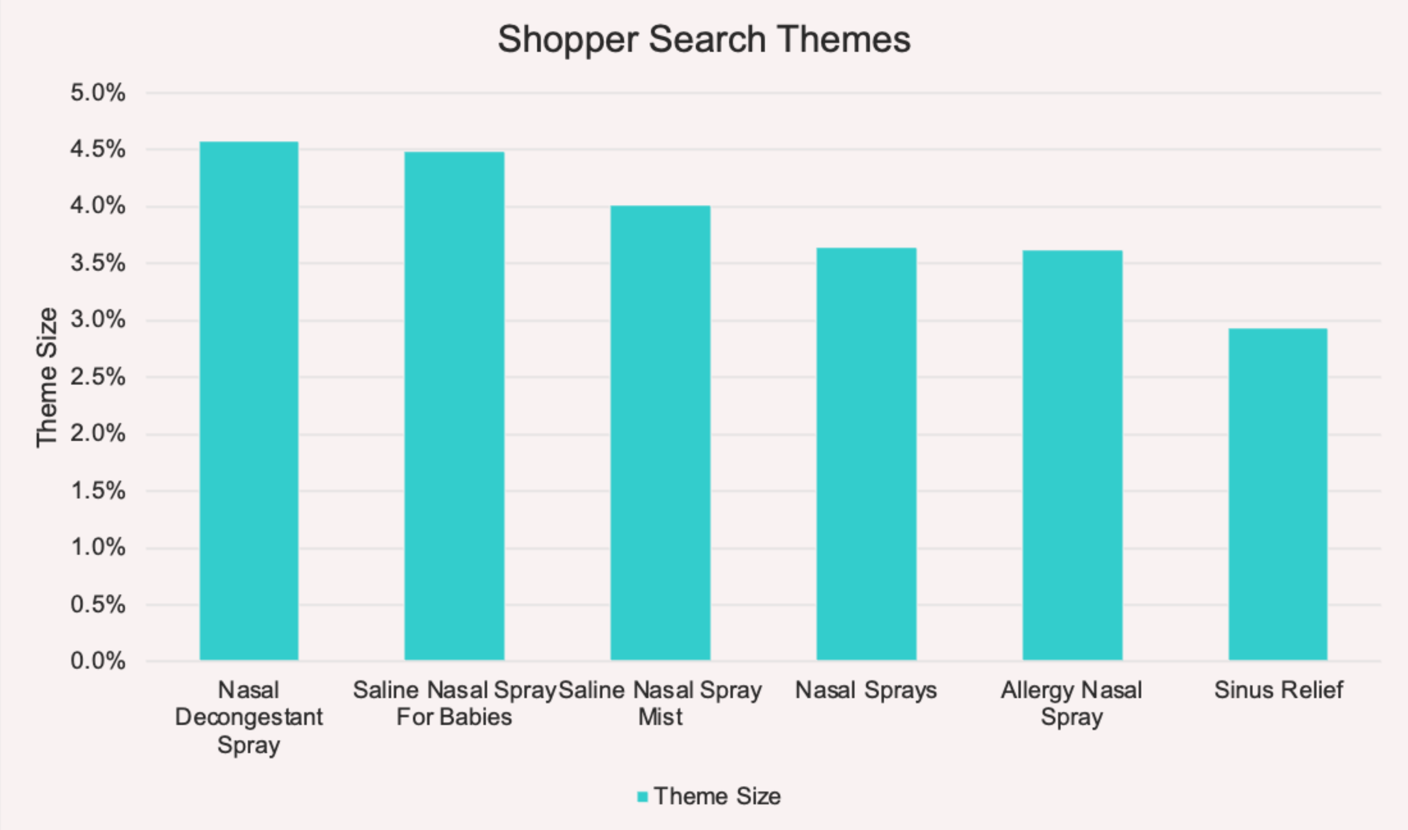
- Amazon Basic Care’s presence grew by 0.2% in both organic and paid, with market share at 8.28%
- Flonase maintained organic presence, but paid presence declined by 0.1%, market share at 22%
- Xlear’s organic and paid presence grew by 0.1%, with market share at 8.49%

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Traffic Drivers – Search Behavior in Cold Medicines: Spray

The category demonstrates low brand affinity, with just 11% of searches being branded





2 % of category search is directly for **Metamucil** products

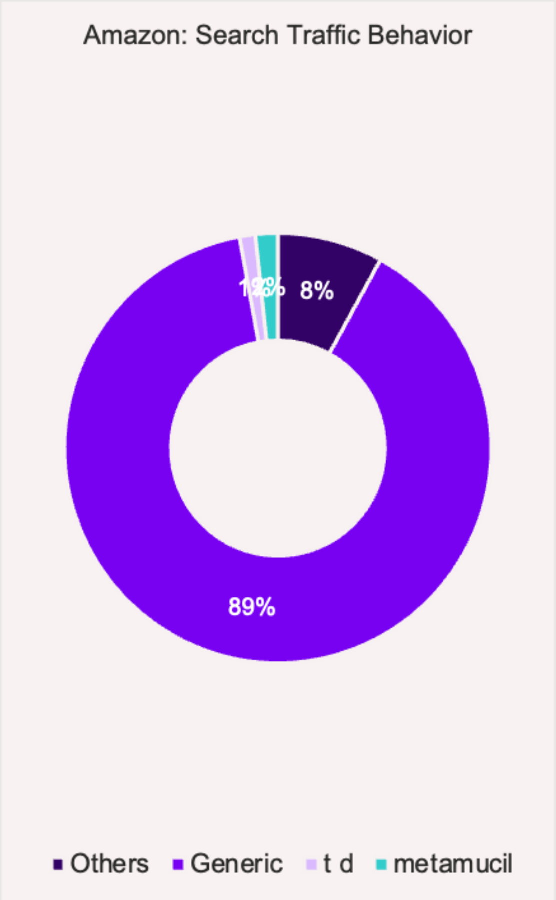
Takeaway

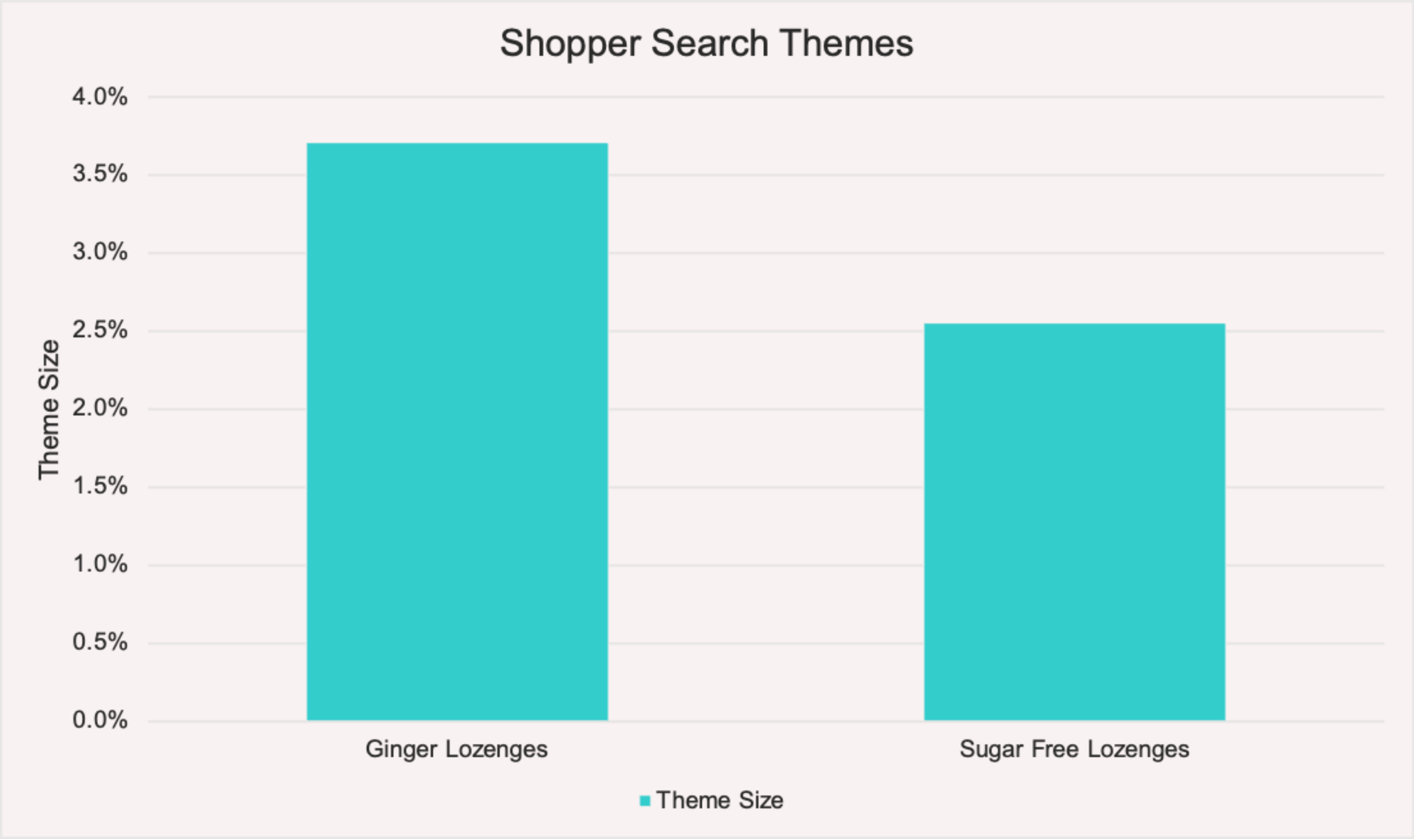
- In Nasal Decongestant Spray, Arm & Hammer holds a 0.39% share, while Vicks leads with 17.03%
- In Saline Nasal Spray For Babies, Arm & Hammer has a low 4.47% share; Grownsy is also low at 4.17%

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Traffic Drivers – Search Behavior in Cold Medicines: Lozenges

The category demonstrates low brand affinity, with just 11% of searches being branded





2 % of category search is directly for **Metamucil** products

Takeaway

- Act leads with a 27.3% market share in Ginger Lozenges and also dominates the Sugar-Free Lozenges segment.

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

What shoppers are buying in Cold Medicines: Spray

Takeaway

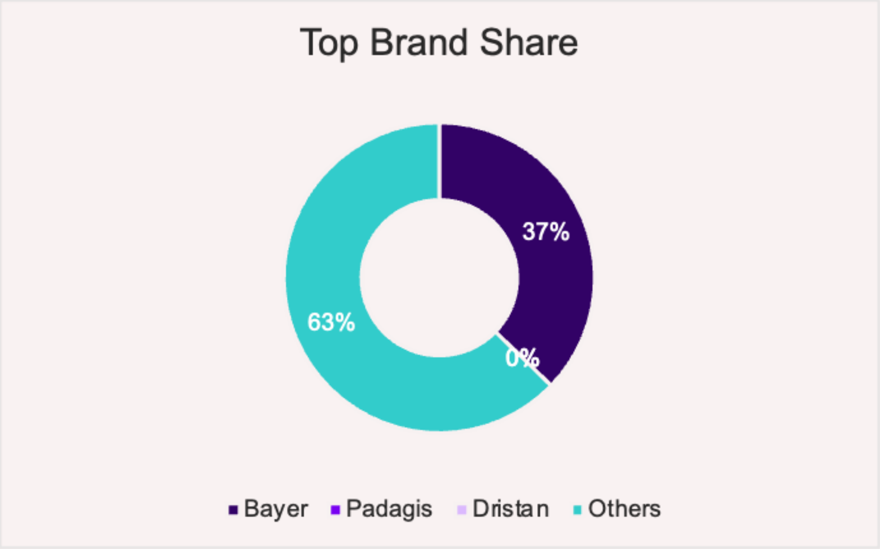
- Congestion Relief theme has the highest category share at 14.1%

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Themes defined based on title occurrence

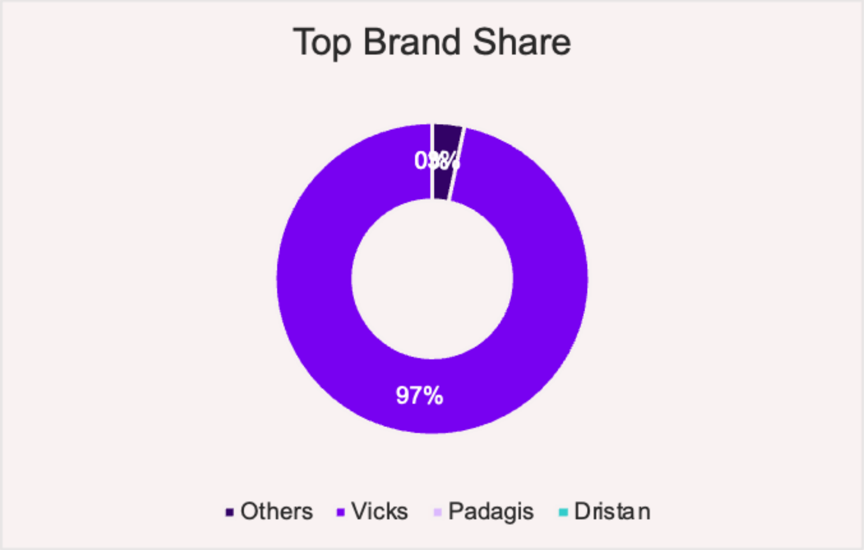
What shoppers are buying

Vicks dominates Sinus Pressure while Bayer leads in Congestion Relief

Congestion Relief



Sinus Pressure

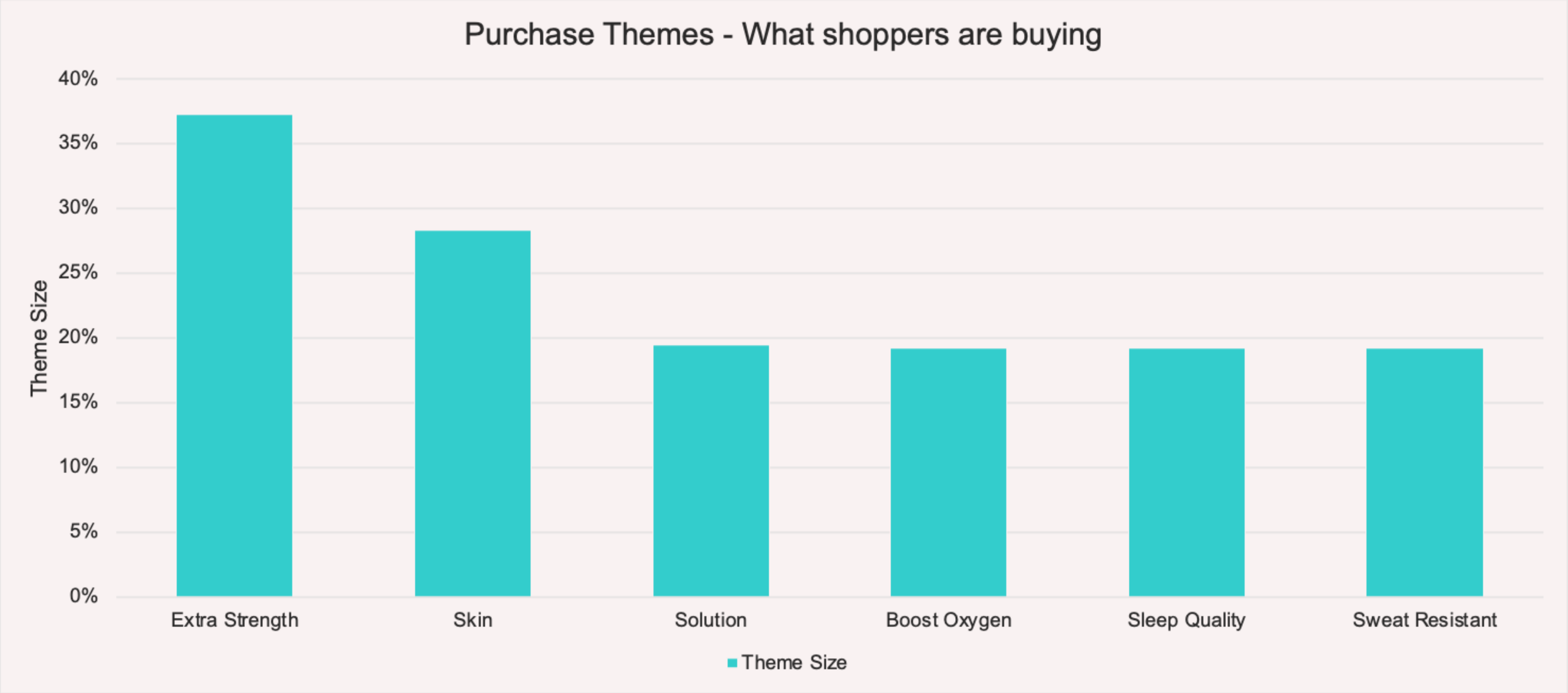


Takeaway

- Bayer holds 37.2% share in Congestion Relief; the theme is not highly contested
- Vicks dominates Sinus Pressure with a 96.7% share; theme is highly contested
- Bayer has the highest share, 37.2% in Congestion Relief
- Vicks has the highest share, 96.7% in Sinus Pressure

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
*Themes defined based on title occurrence

What shoppers are buying



Takeaway

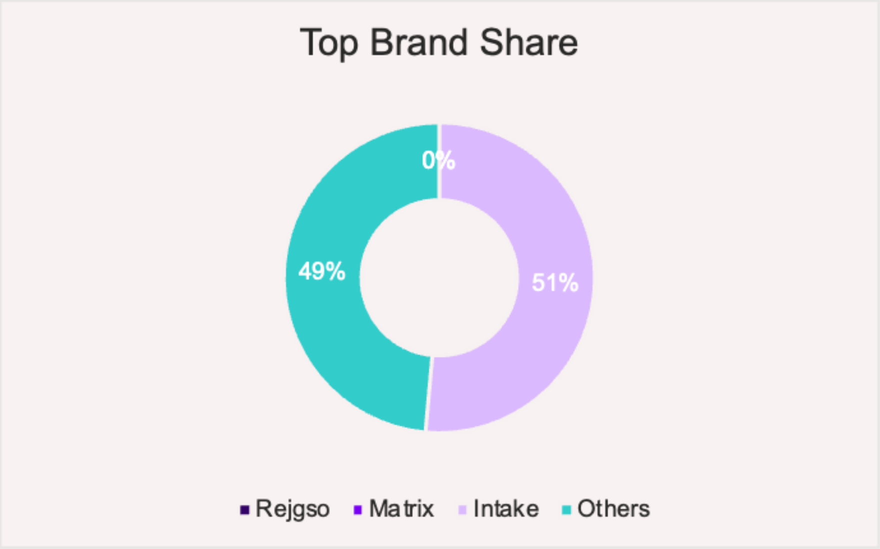
- Extra Strength has the highest category share at 37.3%

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Themes defined based on title occurrence

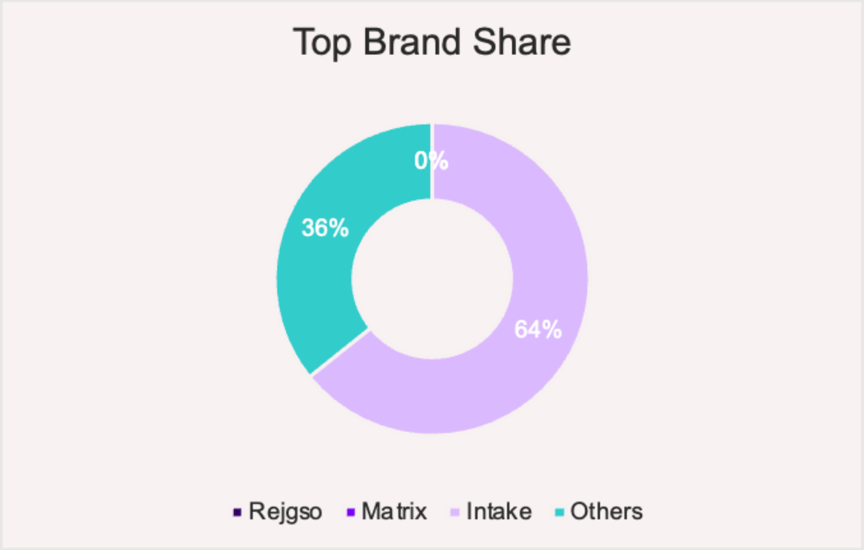
What shoppers are buying

Intake dominates in Extra Strength and Skin themes, leaving limited opportunities for Church Dwight

Extra Strength



Skin



Takeaway

- In the Extra Strength theme, Intake holds 51.4% share, indicating a highly contested market
- In the Skin theme, Intake dominates with a 64.2% share, suggesting a highly contested market
- Intake has the highest share, 51.4% in the Extra Strength theme
- Intake has the highest share, 64.2% in the Skin theme

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Themes defined based on title occurrence

What shoppers are buying

Individually Wrap and Sugar Free are top themes in this segment

Takeaway

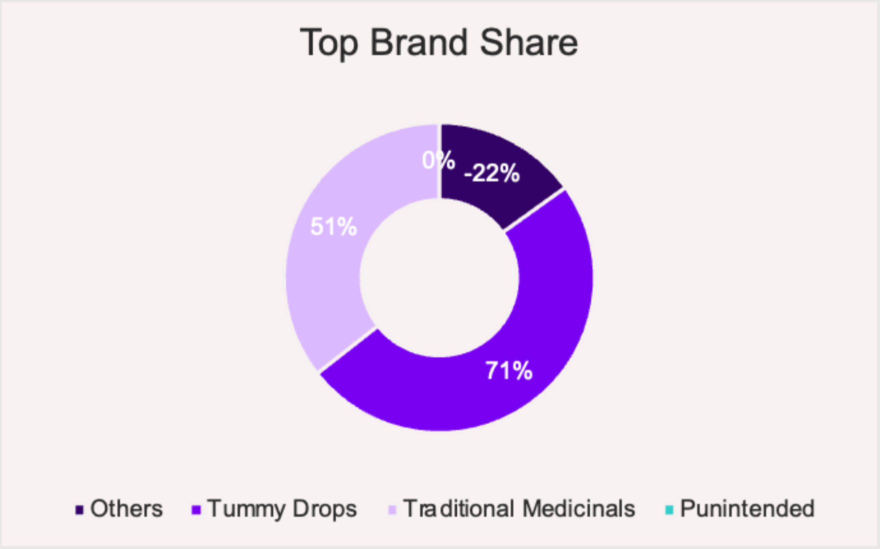
- Individually Wrap has the highest category share at 15.4% followed by Sugar Free with 15% share
- Therabreath holds a 7.6% share in Sugar Free

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
*Themes defined based on title occurrence

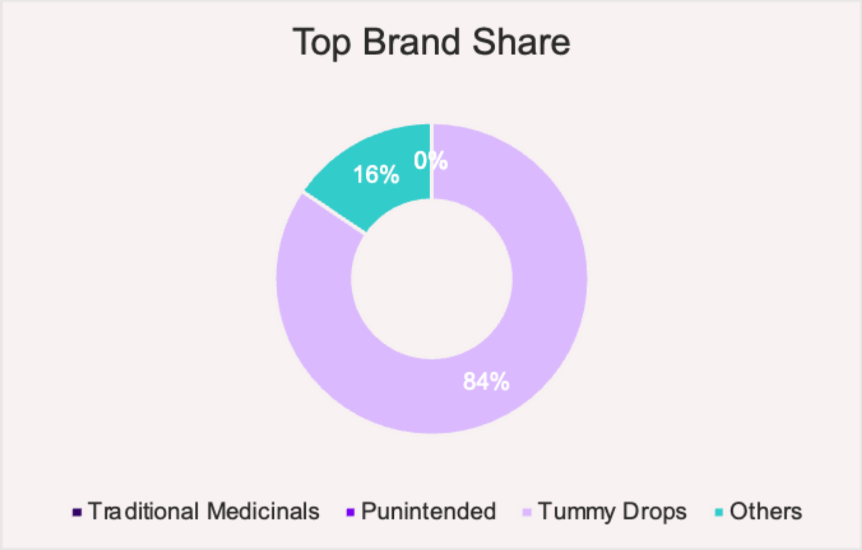
What shoppers are buying

Therabreath has opportunities in Gluten Free while Individually Wrap is highly contested

Individually Wrap



Gluten Free



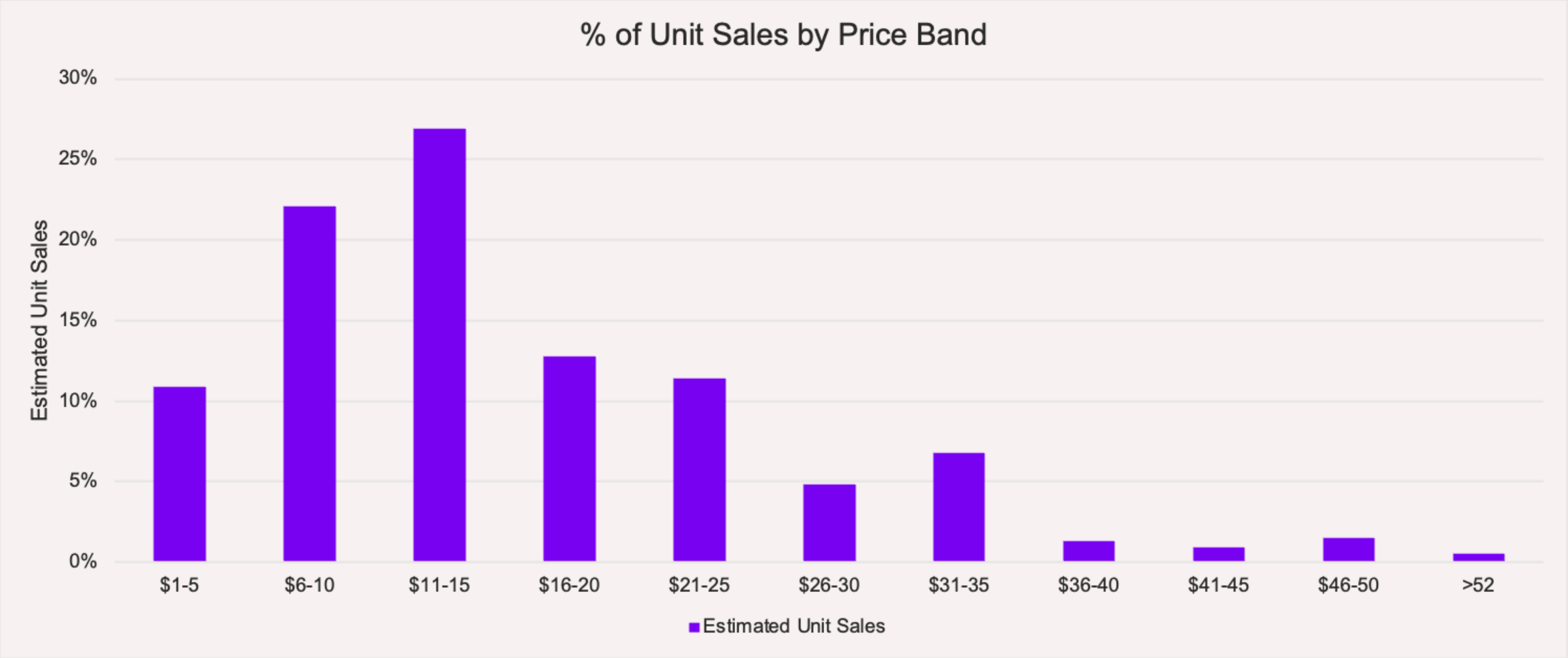
Takeaway

- In Gluten Free, Tummy Drops holds 84.5% share; theme is not highly contested, opportunity for Therabreath exists
- In Individually Wrap, Tummy Drops leads with 70.6% share; theme is highly contested with top 3 brands over 50%
- Tummy Drops has the highest share, 84.5% in Gluten Free
- Tummy Drops has the highest share, 70.6% in Individually Wrap

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24
Themes defined based on title occurrence

Pricing Architecture – Unit Sales by Price Band

Price Band Analysis

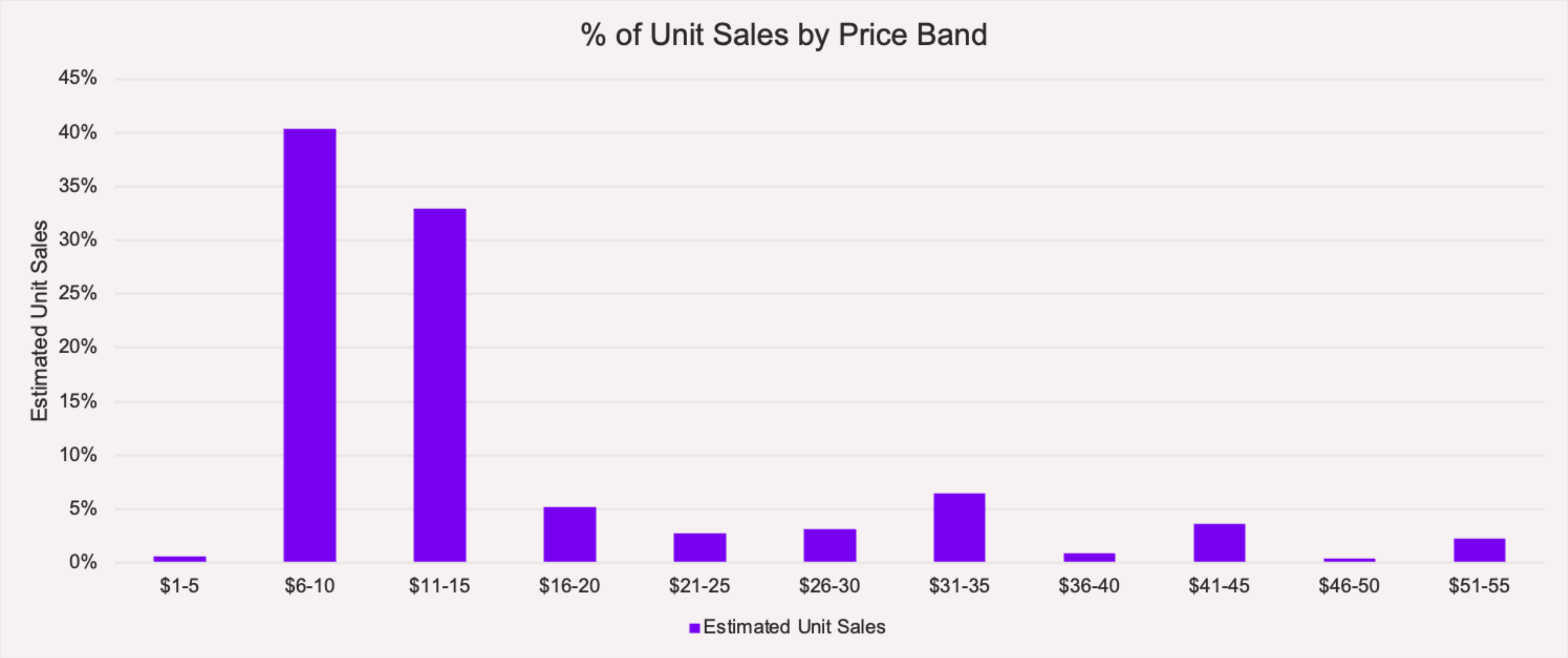


Takeaway

- Top price bands $11-15 (27%) and $6-10 (22%) account for 50% of overall units sold
- Tail price bands $41-45, $46-50, and >$52 contribute 3% of units and 9% of revenue
- Price band $11-15 contributes 27% of units and 22.4% of revenue, Mucinex dominates

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

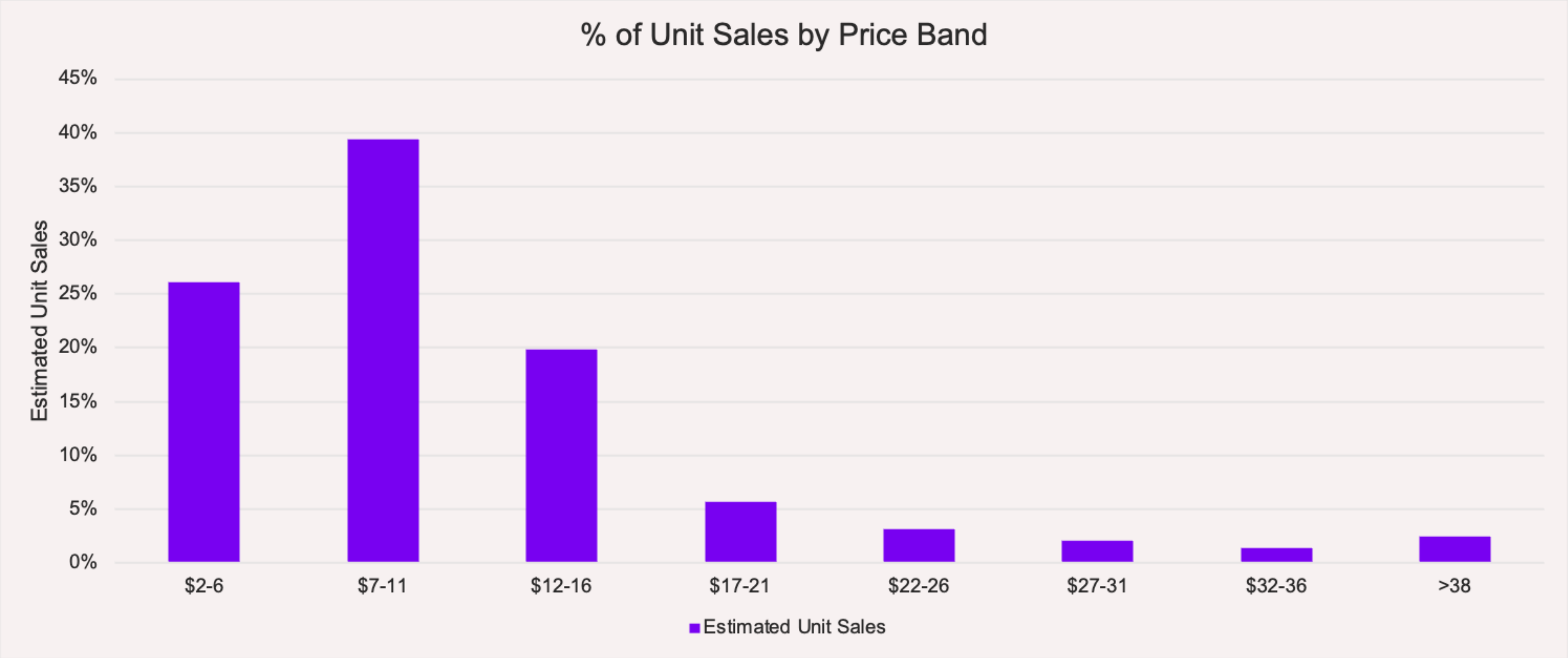
Pricing Architecture – Unit Sales by Price Band



Takeaway

- 73% of overall units sold are in $6-10 (40%) and $11-15 (33%) price bands
- Tail price bands ($46-50, $51-55 & >$60) contribute 4% of units and 14% of revenue
- $6-10 price band contributes 40% of units and 25.5% of revenue, Zicam is a dominant brand

Pricing Architecture – Unit Sales by Price Band



Takeaway

- Top 2 price bands: $2-6 (39%) and $7-11 (26%) contribute 65% of overall units sold
- Tail price bands $32-36, $27-31, and >$38 contribute 6% units and 19.7% revenue
- $7-11 price band contributes 39.4% units and 31.3% revenue, dominated by Three Lollies

Time period: Sep 29 24 to Dec 28 24 vs Jun 30 24 to Sep 28 24

Ready to learn more about how CommerceIQ is helping Cold Medicine brands beat the competition?

Request a demo