

The Private Label *AI Advantage*

Pharmacy & OTC — AI tells you to buy the store brand, and in over-the-counter medicine it says so out loud.

Published **Brands modeled**

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25

Answer engines

ChatGPT · Claude · Perplexity · Gemini · Google AI Overviews

Research by

5W AI Communications

45vs25

CITATION SHARE —
STORE-BRAND OTC VS
NATIONAL OTC BRANDS

1.8x

STORE BRANDS
CITED MORE
OFTEN THAN
NATIONAL OTC
BRANDS

6/6

SUB-CATEGORIES
STORE BRANDS
WIN — A CLEAN
SWEEP

64

CONSUMER-INTENT
PROMPTS TESTED
ACROSS FIVE
ANSWER ENGINES

01 Executive Summary

This is the franchise's strongest result.

5W modeled the Citation Share of 25 over-the-counter health brands: 13 store-brand OTC lines against 12 national OTC brands, across five answer engines and 64 consumer-intent prompts. **Store-brand OTC earned an average Citation Share of 45. National OTC brands earned 25.**

OTC is the category where the private label AI advantage is not just wide — it is *active*. In grocery, AI surfaces store brands. In OTC, answer engines go further: they routinely tell shoppers, in plain language, that the store brand contains the identical active ingredient as the national brand at a fraction of the price. The single most-cited fact in the category is a structural argument *for* the store brand.

National OTC brands built the most valuable names in retail healthcare — Tylenol, Advil, Claritin. Answer engines treat those names as starting points for a comparison that ends with the store brand.

Over-the-counter medicine moved to the answer layer with a fact no other category carries: the products are often chemically identical.

THE LEGACY MODEL

- ◆ Pharmacy shelf placement
- ◆ Brand-name trust
- ◆ TV advertising
- ◆ Search rankings
- ◆ Packaging recognition

THE ANSWER-ENGINE MODEL

- ◆ Retrieval authority
- ◆ Active-ingredient equivalence
- ◆ Pharmacist endorsement in content
- ◆ Trust density
- ◆ Answer-layer visibility

02 The Headline Finding

Over-the-counter medicine has a property no other consumer category shares: **the products are, by regulation, often chemically identical.** Equate ibuprofen and Advil contain the same active ingredient at the same dose. This is not a marketing claim — it is printed on both boxes, and it is the most repeated fact in OTC content across the web.

Answer engines retrieve and state that fact directly. Ask one “is store-brand ibuprofen as good as Advil” and the answer is an unambiguous yes, with the price difference attached. In grocery, “best value” is a judgment. In OTC, it is closer to arithmetic — and answer engines are very good at arithmetic.

When two products are the same, brand recognition is the expensive option.

THE OTC MECHANIC, IN ONE LINE

The national OTC brand's entire defense — brand trust — is the one asset a same-active-ingredient comparison neutralizes.

03 Methodology

Franchise-standard. 25 OTC brands — 13 store-brand lines, 12 national — scored across five answer engines on 64 consumer-intent prompts spanning six sub-categories. Prompts mirror real shopper language, with no brand names seeded.

Citation Share is a directional visibility model measuring how frequently brands, retailers, and experts appear across AI-generated answers inside ChatGPT, Claude, Gemini, Perplexity, and Google AI Overviews. Scores are indexed 0–100, estimated from current answer-engine behavior and the structure and density of the open-web content each brand can be surfaced from. It is a model of the retrieval landscape — not a logged-query count, which is unstable and easily gamed.

Example prompts tested

PAIN RELIEF <i>“Is store-brand ibuprofen as good as Advil”</i>	COLD & FLU <i>“Best cold and flu medicine”</i>
ALLERGY <i>“Cheapest effective allergy medicine”</i>	DIGESTIVE HEALTH <i>“Best value antacid”</i>
SLEEP & TOPICALS <i>“Generic vs brand sleep aid”</i>	FIRST AID <i>“Store brand vs name brand pain reliever”</i>

04 The Citation Share Index

Modeled Citation Share across all five answer engines. Click any column header to sort.

RANK ▲	BRAND ↓	TIER ↓	CITATION SHARE ↓
01	Equate Walmart	STORE BRAND	81
02	CVS Health	STORE BRAND	76
03	Up & Up Target	STORE BRAND	67
04	Amazon Basic Care	STORE BRAND	61
05	Kirkland Signature Costco	STORE BRAND	55
06	Walgreens	STORE BRAND	52

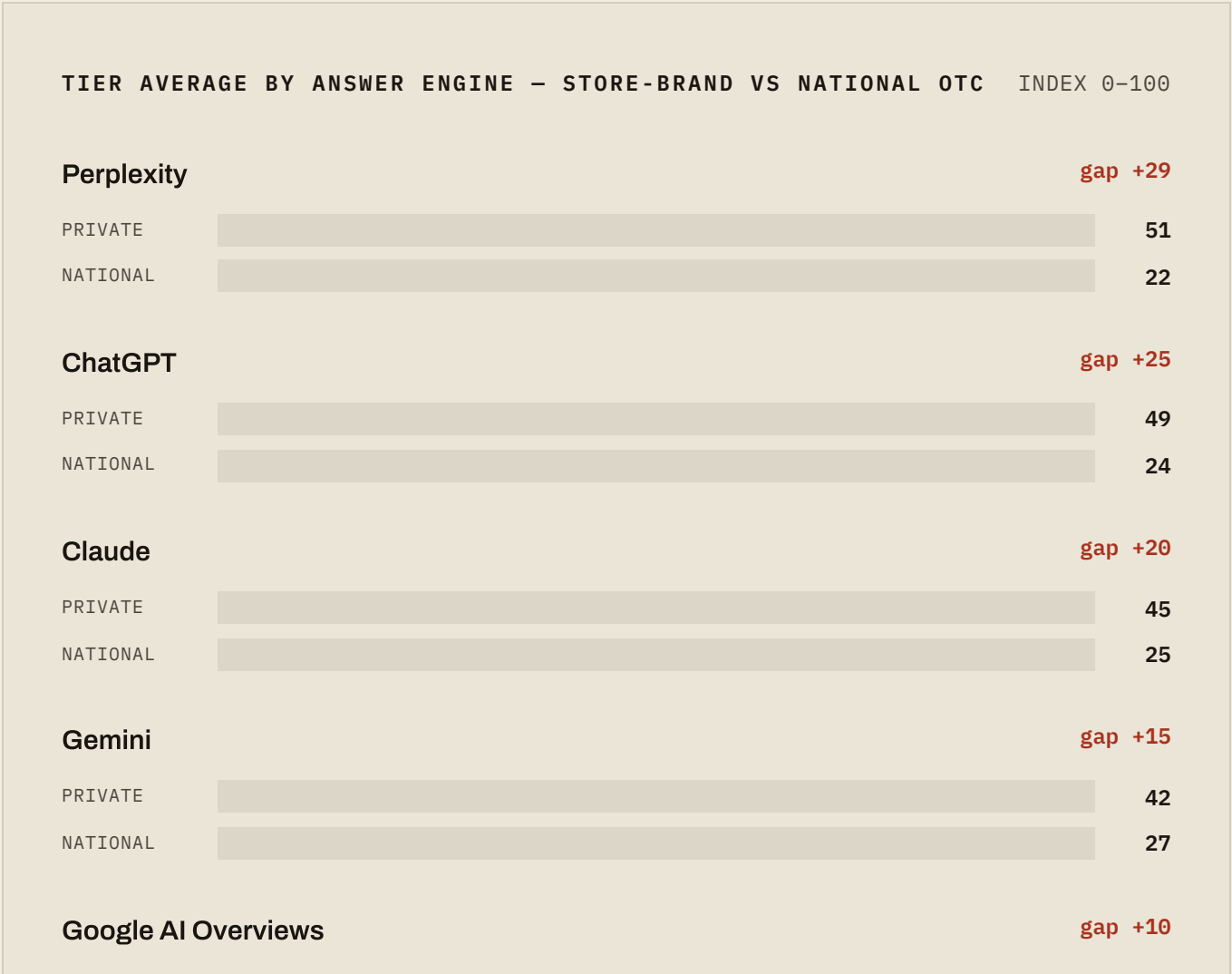
RANK ▲	BRAND ▼	TIER ▼	CITATION SHARE ▼
07	Tylenol	NATIONAL	41
08	Member's Mark Sam's Club	STORE BRAND	40
09	Advil	NATIONAL	39
10	GoodSense	STORE BRAND	33
11	Claritin	NATIONAL	30
12	Berkley Jensen BJ's	STORE BRAND	29
13	Zyrtec	NATIONAL	28
14	Rite Aid brand	STORE BRAND	27
15	Mucinex	NATIONAL	27
16	Kroger Health	STORE BRAND	25
17	Benadryl	NATIONAL	24
18	Pepto-Bismol	NATIONAL	23
19	Aleve	NATIONAL	21
20	HealthA2Z	STORE BRAND	20
21	Tums	NATIONAL	19
22	Robitussin	NATIONAL	17
23	Quality Choice	STORE BRAND	17
24	Sudafed	NATIONAL	16
25	Nyquil	NATIONAL	15
TIER AVERAGES			PL 45 • NAT 25

FIGURE 1. Tier averages: store-brand OTC 45 · national OTC 25 – the franchise’s widest gap. Bar length scaled to score.

The top six positions are all store brands. The strongest national brand — Tylenol — does not appear until #7, and ranks there precisely because “Tylenol” functions as a near-generic term for acetaminophen.

05 Platform by Platform

Store-brand OTC leads on all five engines, and the gap is the most consistent in the franchise — because the underlying fact is platform-independent.



PRIVATE		38
NATIONAL		28

FIGURE 2. Tier average by answer engine. The wider the community-content reliance, the wider the gap.

Perplexity and **ChatGPT** show the widest gaps; both readily produce the explicit “same ingredient, lower price” comparison. **Claude** does the same, with careful framing. **Gemini** and **Google AI Overviews** also favor store brands, slightly less aggressively, as Google’s index carries more national-brand search authority. On no engine do national OTC brands lead.

06 Sub-Category Analysis

Store brands win all six sub-categories — the only clean sweep in the franchise.

SHARE OF CITATIONS WITHIN EACH SUB-CATEGORY

% SPLIT

Pain Relief

STORE DECISIVE

78

22

Cold & Flu

STORE WIN

62

38

Allergy

STORE DECISIVE

74

26

Digestive Health

STORE WIN

66

34

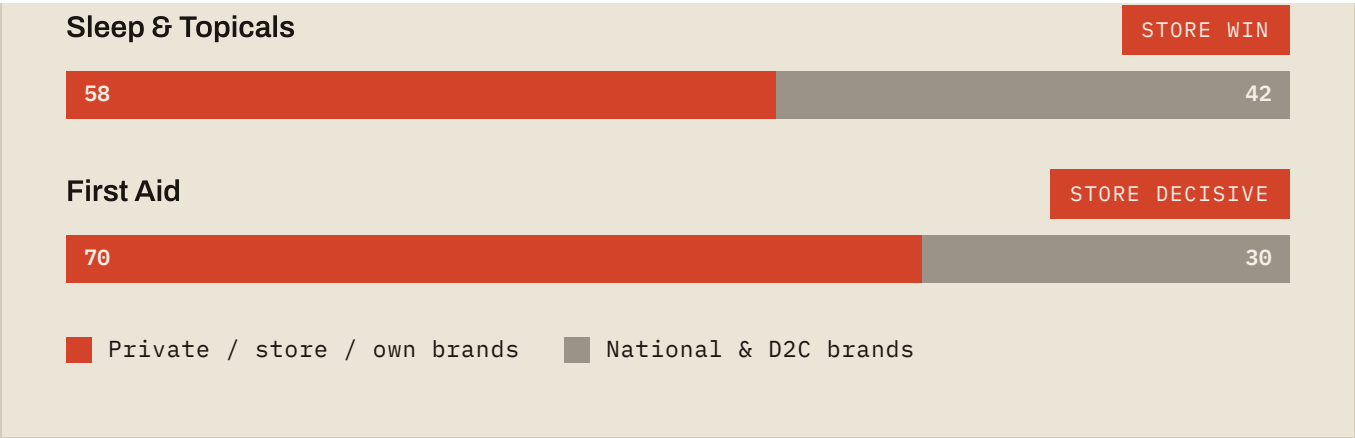


FIGURE 3. Where the advantage holds – and where it does not.

The margin is widest in **Pain Relief** and **Allergy**, where active-ingredient equivalence is most widely understood and discussed — ibuprofen, acetaminophen, loratadine, cetirizine. It is narrowest, though still a store-brand win, in **Cold & Flu** and **Sleep & Topicals**, where multi-symptom national brands like Nyquil retain some brand-as-category pull. There is no national-brand stronghold sub-category. That absence is the story.

07 Why AI Recommends These Brands

Answer engines recommend store-brand OTC because every retrieval input points the same direction — and one of them is a regulator-enforced fact:

01 Reddit & community density Overwhelmingly pro-store-brand. “Just buy the generic” is among the most repeated pieces of advice on the consumer-health internet.	02 Editorial coverage Consumer-health journalism almost uniformly endorses generic OTC equivalence and quantifies the price gap.
03	04

Review ecosystems

Store-brand OTC carries large, satisfied review volumes — buyers confirm the products work.

Expert & pharmacist mentions

Decisive. “Ask a pharmacist and they’ll tell you to buy the generic” is a widely retrievable line.

05

Explainer & ingredient coverage

The accelerant. Active-ingredient explainers state, plainly, that the cheaper product is the same product.

06

Retailer authority / halo

Strong. Shoppers trust CVS, Walmart, and Costco with their health; that trust transfers to Equate, CVS Health, and Kirkland.

Five of the six inputs are unusually strong for store brands — and the sixth, ingredient-equivalence content, is not a soft signal but a hard, regulator-enforced fact the open web repeats endlessly. No other category gives answer engines such a clean, verifiable basis to recommend the cheaper option. For once, the community layer and the expert layer point the same way: both at the store brand.

Which sources shape the answer

Conversational retrieval draws on a measurable source mix. In OTC, the most influential sources all point the same direction — toward the store brand.

GROUNDING SOURCES BY INFLUENCE ON ANSWER-ENGINE RECOMMENDATIONS

INFLUENCE INDEX 0–100

Expert & health publications

84



Consumer-health journalism and pharmacist commentary almost uniformly endorse generic equivalence.

Ingredient & active-ingredient explainers

80



The accelerant — explainers state plainly that the cheaper product is the same product.

Reddit & community forums

74



“Just buy the generic” is among the most repeated pieces of advice on the consumer-health internet.

Editorial & consumer publishers

66

“Brand vs generic” explainers quantify the price gap and favor the store brand.

Retailer pages & FAQs

55

Pharmacy retailer content carries health-trust weight via the retailer halo.

Independent reviews & review sites

52

Large satisfied review volumes confirm store-brand OTC works.

YouTube & video

40

Lower influence; OTC decisions are text- and fact-driven.

FIGURE 4. The source types conversational retrieval leans on most when recommending brands in this category – the grounding layer beneath every answer.

08 Who's Losing — and Why

National OTC brands are the franchise's clearest losers. Their core asset — a trusted name — is precisely what a same-ingredient comparison erodes. **Sudafed, Nyquil, Robitussin, Tums, Aleve** sit at the bottom: strong names, under-cited, recommended (when at all) as the more expensive option.

Even **Tylenol and Advil**, the category’s most powerful brands, rank only mid-table — and largely because their names have become shorthand for their active ingredients, which is its own long-term vulnerability.

09 **The Structural Explanation**

OTC is where all four answer-engine rewards align perfectly with the store brand — simplicity, trust density, content recency, value clarity — and a fifth factor joins them: **factual equivalence**. A regulator-enforced, web-documented fact that the cheaper product is the same product.

Answer engines are built to surface exactly that kind of clean, verifiable fact. This is not an architecture match. It is an architecture match with the category’s central fact acting as an accelerant.

AI does not just favor the store brand here. It explains why — out loud, in every answer.

THE STRUCTURAL READ

Legacy advantage vs AI-era advantage

The shift is not cosmetic. It is a change in which assets generate visibility.

LEGACY ADVANTAGE	AI-ERA ADVANTAGE
Shelf placement	Retrieval authority
Advertising spend	Recommendation frequency
Brand recognition	Trust density

LEGACY ADVANTAGE	AI-ERA ADVANTAGE
Retail distribution	Community discussion
Search-engine ranking	Answer-layer visibility

10 The Retailer Halo Effect



The Retailer Halo Effect — Pharmacy

The trust transferred here is health trust. A shopper who trusts CVS as a pharmacy extends that trust to CVS Health-branded medicine — and answer engines reinforce that inherited signal because the open web does too.

The halo is at its most consequential in OTC. A shopper who trusts CVS as a pharmacy extends that trust to CVS Health-branded medicine without hesitation. The pharmacy halo is the strongest version of the effect 5W has modeled: it converts a retailer’s clinical credibility directly into store-brand Citation Share — which is why Equate and CVS Health hold the top two positions in the index.

11 The Community Factor

Two content layers compound here. Community discussion — Reddit threads, forums — is overwhelmingly pro-store-brand, full of “just buy the generic” advice. And *expert* content

agrees: pharmacist commentary, consumer-health journalism, and medical explainers almost uniformly endorse generic OTC equivalence.

For once, the community layer and the credentialed-authority layer point the same direction — both at the store brand. That alignment is why OTC has no national-brand firewall.

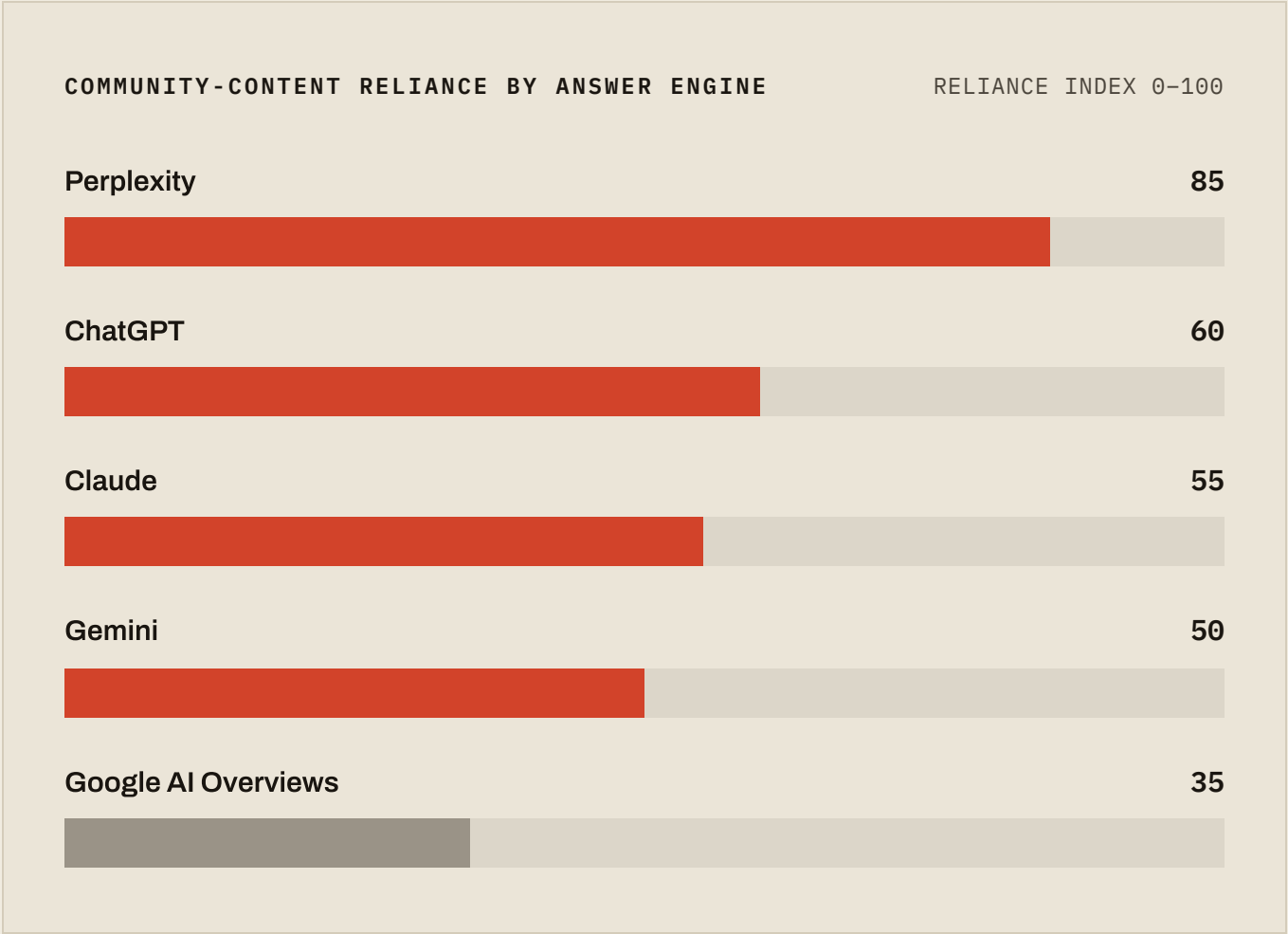


FIGURE 5. The systems that lean hardest on community and review content are the ones that move citation share the most.

Visibility is shifting from placement to retrieval — and in OTC, the retrieval verdict is already in.

THE COMMUNITY FACTOR

12 Winners

Equate

Citation Share 81 • #1

Walmart's scale, a coherent brand, and the full force of the same-ingredient argument — the most-cited store brand in the entire franchise.

CVS Health

Citation Share 76 • #2

The pharmacy halo at maximum strength — health trust transferred directly into Citation Share.

Up & Up

Citation Share 67 • #3

Target's well-built health line, riding the Good & Gather-style reputation Target has earned.

13 Losers

Nyquil

Citation Share 15 • #25

A household name at the bottom of the index. Brand equity is real and, against a comparison built on factual equivalence, close to inert.

Sudafed

Citation Share 16 • #24

Strong recognition, under-cited — recommended, when at all, as the more expensive option.

Tylenol & Advil

Citation Share 41 / 39

The instructive case: even category-defining brands rank only mid-table, propped up by name-as-generic recognition that is itself eroding.

Common thread: in OTC, brand equity is the asset under attack. A same-ingredient comparison turns a century of brand-building into a price premium an answer engine flags.

14 The Commercial Stakes

Private-label OTC already holds close to half the category by value and is growing several times faster than national brands. AI search is positioned to push that further and faster than in any other category — because the answer engine does the persuasion the store brand used to need shelf placement and price stickers to do.

For national OTC brands, this is the franchise's most urgent warning: the defense cannot be the brand name. It has to be genuine, communicable, AI-legible differentiation — faster onset, a cleaner formulation, a combination product — or the erosion compounds answer by answer.

15 The GEO Playbook

For national OTC brands, the playbook is not brand defense. It is building a real difference an answer engine can retrieve.

1 Stop defending the name; build a real difference. Faster onset, cleaner formulation, a combination product, a better format — something a same-ingredient

comparison cannot neutralize.

- 2 **Make the difference retrievable.** The content establishing it must be dense, credible, and current on sources answer engines trust.
- 3 **For retailers, protect the pharmacy halo.** Clinical reputation is the asset; the OTC line compounds with it.
- 4 **Own the comparison prompt.** “Store brand vs name brand” is, in OTC, the category. Measure and shape that single answer.
- 5 **Track Citation Share on a fixed cadence.** In a category eroding answer by answer, an untracked metric is an unmanaged one.

The principle underneath all five: **build the infrastructure before the crisis — not during it.**

16 Limitations & Outlook

Limitations. Directional model, May 2026. Scores measure AI visibility, not medical guidance — nothing here is health advice; active-ingredient equivalence does not mean products are identical in every respect, and that nuance matters. Brand set is 25 of the most relevant OTC brands.

Outlook. Store-brand OTC’s advantage is structural and accelerating; the only national-brand path is genuine differentiation, not brand defense. OTC is the franchise’s strongest proof of the thesis — the category where AI does not just favor the store brand, it explains why.

Glossary

▶ Citation Share The modeled frequency with which a brand appears across AI-generated answers for a defined set of buyer questions. Indexed 0–100; the answer-engine equivalent of share of voice.	▶ Answer-Layer Visibility A brand's presence inside the AI-generated answer a buyer reads before reaching a shelf or a search result — the competitive surface that now precedes market share.
▶ Retrieval Authority The strength and consistency of the open-web signal an answer engine draws on when deciding which brands to surface for a query.	▶ Trust Density The concentration of credible, independent signals — reviews, community discussion, expert mentions, verification — attached to a brand. Answer engines reward it heavily.
▶ Recommendation Frequency How often a brand is actively recommended, not merely mentioned, across answer engines for category-defining prompts.	▶ Retailer Halo Effect The transfer of a retailer's reputation onto its private brand. Answer engines reinforce that inherited trust signal, citing the brand as though the retailer's credibility were its own.

PART OF A SERIES

This is Part 4 of [The Private Label AI Advantage](#) — a five-part series within the 5W AI Visibility Index, measuring how answer engines cite store brands against national brands across grocery, e-commerce, pet, pharmacy, and supplements. Each study tests one question: which brands AI recommends, and why.

5W AI Communications

About 5W

5W is the AI Communications Firm, building brand authority across the platforms where decisions now happen — ChatGPT, Claude, Perplexity, Gemini, and Google AI Overviews — alongside earned media, digital, and influencer channels. 5W combines public relations, digital marketing, Generative Engine Optimization (GEO), and proprietary AI visibility research to help clients measure and grow their presence in AI-driven buyer research. Founded in 2003, 5W is recognized as a Top U.S. PR Agency by O'Dwyer's, named Agency of the Year in the American Business Awards®, honored as a 2026 Top Place to Work in Communications by Ragan, and named to Digiday's WorkLife Employer of the Year list. Learn more at 5wpr.com.

Sources & Data

North America OTC market data — industry market research, 2025–2026 · Private-label OTC share and growth — category analysis · Store-brand and national OTC performance — retailer and manufacturer data · Private-label market context — Circana & PLMA.

5W AI Visibility Index — Pharmacy & OTC Edition · AI discovery and recommendation intelligence by 5W AI Communications · May 2026 · Citation Share figures are directional models, not logged-query counts.