Nicholas Hall's
CHC REPORTS

Analgesics Report

Exploring the Current & Future Self-Care Market for Pain Relief

Key Features of this Report:

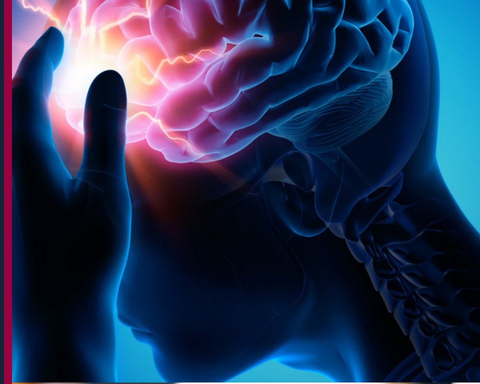
- An in-depth exploration of the pain relief market, including **Systemic analgesics**, **Topical analgesics** and **Mouth & dental analgesics**, plus key adjacent VMS category **Herbal & natural joint health supplements**
- **Coverage of 12 major countries** from across the globe, with topline sales, brand performances, latest developments, launches and promotional campaigns
- Very latest MAT Q2 2022 sales from ***DB6***, our dedicated CHC sales database, plus historical growth rates to help chart performance fluctuations
- Category sales **segmented by ingredient** in each country†
- Systemic analgesics sales segmented into **adults and children's presentations**, and Topical analgesics sales split by **format** and **medicated vs non-medicated presentations**†
- **Case studies** of key Analgesics brands, highlighting success factors, sales, NPD and A+P activity
- A look at the latest findings from **Scientific studies**, including **promising ingredients** and **analysis of CBD's role in pain relief**
- A look to the future includes long-term **forecast sales** for all categories and countries to 2026 & 2031, plus the most up-to-date short-term forecasts to end-2022 & 2023

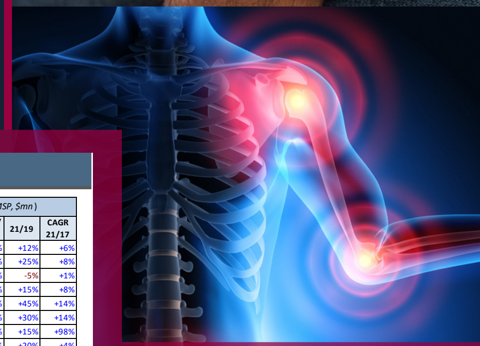
† *based on year-end 2021 sales*

As the global retail market returns to high growth in 2022, bouncing back from an historic and coronavirus-driven decline, **Analgesics** is among the fastest-growing major categories. What are the factors behind this growth and how sustainable are they?

Systemic analgesics have undoubtedly benefited from recommendations for OTC products to treat fever and pain following Covid-19 vaccinations, while resurgence of cold & flu infections has particularly bolstered the children's pain & fever segment. Topical analgesics profited from a post-lockdown return to active lifestyles and corresponding increase in exercise-related pain. Indeed a pandemic-driven shift in lifestyle routines (sedentary habits, increased screen use, stress and shifting sleep patterns) helped drive sales of all pain relief brands.

Meanwhile, Switch has expanded categories in certain markets and NPD fortified selected brands, while several marketers enjoyed success by targeting specific pain niches. Strong A+P investment, as marketer confidence returns, has proved an important growth driver in some areas.





12 individual markets profiled

Australia Brazil Canada China France Germany India Italy Japan Poland UK USA

Key questions investigated in this report

What are the key differences from market to market in terms of growth trends, regulations and competitive landscape?

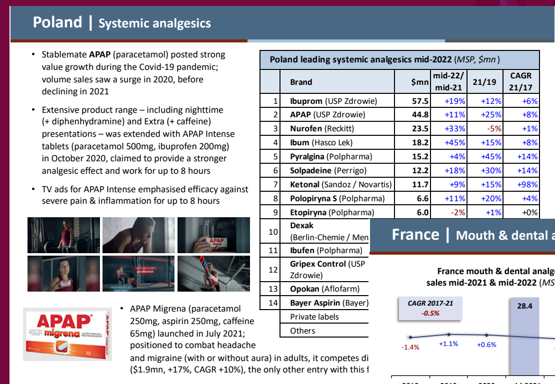
Which marketers and brands stand out and why?

How much NPD has the Analgesics market seen and can it drive growth?

Are new areas to explore signposted by the latest scientific studies?

Does CBD have a future in pain relief?

Which gaps in the market still exist and where do opportunities for future growth lie?

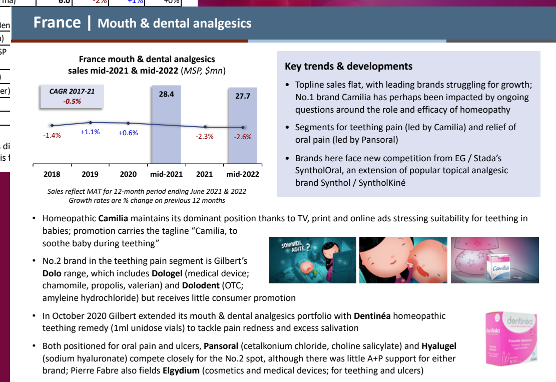


Poland | Systemic analgesics

- Stablemate **APAP** (paracetamol) posted strong value growth during the Covid-19 pandemic; volume sales saw a surge in 2020, before declining in 2021
- Extensive product range – including nighttime (+ diphenhydramine) and Extra (+ caffeine) presentations – was extended with APAP Intense tablets (paracetamol 500mg, ibuprofen 200mg) in October 2020, claimed to provide a stronger analgesic effect and work for up to 8 hours
- TV ads for APAP Intense emphasised efficacy against severe pain & inflammation for up to 8 hours
- APAP Migrena (paracetamol 250mg, aspirin 250mg, caffeine 65mg) launched in July 2021; positioned to combat headache and migraine (with or without aura) in adults, it competes di ($1.9mn, +17%, CAGR +10%), the only other entry with this f

Poland leading systemic analgesics mid-2022 *(MSP, $mn)*

	Brand	$mn	mid-22/ mid-21	21/19	CAGR 21/17
1	**Ibuprom** (USP Zdrowie)	57.5	+19%	+12%	+6%
2	**APAP** (USP Zdrowie)	44.8	+11%	+25%	+8%
3	**Nurofen** (Reckitt)	23.5	+33%	-5%	+1%
4	**Ibum** (Hasco Lek)	18.2	+45%	+15%	+8%
5	**Pyralgina** (Polpharma)	15.2	+4%	+45%	+14%
6	**Solpadeine** (Perrigo)	12.2	+18%	+30%	+14%
7	**Ketonal** (Sandoz / Novartis)	11.7	+9%	+15%	+98%
8	**Polopiryna S** (Polpharma)	6.6	+11%	+20%	+4%
9	**Etopiryna** (Polpharma)	6.0	-2%	+1%	+0%
10	**Dexak** (Berlin-Chemie / Men				
11	**Ibufen** (Polpharma)				
12	**Gripex Control** (USP Zdrowie)				
13	**Opokan** (Aflofarm)				
14	**Bayer Aspirin** (Bayer)				
	Private labels				
	Others				



France | Mouth & dental analgesics

France mouth & dental analgesics sales mid-2021 & mid-2022 *(MSP, $mn)*

Sales reflect MAT for 12-month period ending June 2021 & 2022
Growth rates are % change on previous 12 months

Key trends & developments

- Topline sales flat, with leading brands struggling for growth; No.1 brand Camilia has perhaps been impacted by ongoing questions around the role and efficacy of homeopathy
- Segments for teething pain (led by Camilia) and relief of oral pain (led by Pansoral)
- Brands here face new competition from EG / Stada's SyntholOral, an extension of popular topical analgesic brand Synthol / SyntholKiné

- Homeopathic **Camilia** maintains its dominant position thanks to TV, print and online ads stressing suitability for teething in babies; promotion carries the tagline "Camilia, to soothe baby during teething"
- No.2 brand in the teething pain segment is Gilbert's **Dolo** range, which includes **Dologel** (medical device; chamomile, propolis, valerian) and **Dolodent** (OTC; amyleine hydrochloride) but receives little consumer promotion
- In October 2020 Gilbert extended its mouth & dental analgesics portfolio with **Dentinéa** homeopathic teething remedy (1ml unidose vials) to tackle pain redness and excess salivation
- Both positioned for oral pain and ulcers, **Pansoral** (cetalkonium chloride, choline salicylate) and **Hyalugel** (sodium hyaluronate) compete closely for the No.2 spot, although there was little A+P support for either brand; Pierre Fabre also fields **Elgydium** (cosmetics and medical devices; for teething and ulcers)

Analgesics

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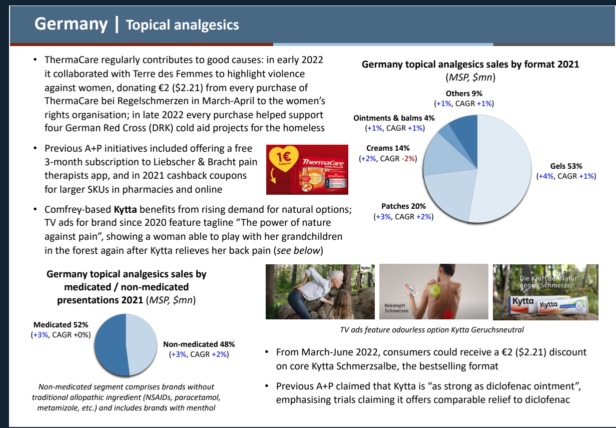
In-depth coverage of the following categories

Systemic analgesics • Topical analgesics

Mouth & dental analgesics

Herbal & natural joint health supplements†

†sales tracked under *VMS* in *DB6*



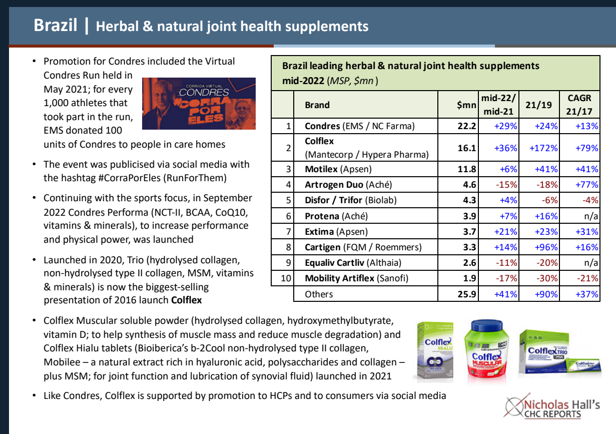
Germany | Topical analgesics

- ThermaCare regularly contributes to good causes: in early 2022 it collaborated with Terre des Femmes to highlight violence against women, donating €2 ($2.21) from every purchase of ThermaCare bei Regelschmerzen in March-April to the women's rights organisation; in late 2022 every purchase helped support four German Red Cross (DRK) cold aid projects for the homeless
- Previous A+P initiatives included offering a free 3-month subscription to Liebscher & Bracht pain therapists app, and in 2021 cashback coupons for larger SKUs in pharmacies and online
- Comfrey-based **Kytta** benefits from rising demand for natural options; TV ads for brand since 2020 feature tagline "The power of nature against pain", showing a woman able to play with her grandchildren in the forest again after Kytta relieves her back pain (*see below*)

Non-medicated segment comprises brands without traditional allopathic ingredient (NSAIDs, paracetamol, metamizole, etc.) and includes brands with menthol

TV ads feature odourless option Kytta Geruchsneutral

- From March-June 2022, consumers could receive a €2 ($2.21) discount on core Kytta Schmerzsalbe, the bestselling format
- Previous A+P claimed that Kytta is "as strong as diclofenac ointment", emphasising trials claiming it offers comparable relief to diclofenac



Brazil | Herbal & natural joint health supplements

- Promotion for Condres included the Virtual Condres Run held in May 2021; for every 1,000 athletes that took part in the run, EMS donated 100 units of Condres to people in care homes
- The event was publicised via social media with the hashtag #CorraPorEles (RunForThem)
- Continuing with the sports focus, in September 2022 Condres Performa (NCT-II, BCAA, CoQ10, vitamins & minerals), to increase performance and physical power, was launched
- Launched in 2020, Trio (hydrolysed collagen, non-hydrolysed type II collagen, MSM, vitamins & minerals) is now the biggest-selling presentation of 2016 launch **Colflex**

Brazil leading herbal & natural joint health supplements mid-2022 (*MSP, $mn*)

	Brand	$mn	mid-22/ mid-21	21/19	CAGR 21/17
1	**Condres** (EMS / NC Farma)	**22.2**	+29%	+24%	+13%
2	**Colflex** (Mantecorp / Hypera Pharma)	**16.1**	+36%	+172%	+79%
3	**Motilex** (Apsen)	**11.8**	+6%	+41%	+41%
4	**Artrogen Duo** (Aché)	**4.6**	-15%	-18%	+77%
5	**Disfor / Trifor** (Biolab)	**4.3**	+4%	-6%	-4%
6	**Protena** (Aché)	**3.9**	+7%	+16%	n/a
7	**Extima** (Apsen)	**3.7**	+21%	+23%	+31%
8	**Cartigen** (FQM / Roemmers)	**3.3**	+14%	+96%	+16%
9	**Equaliv Cartliv** (Althaia)	**2.6**	-11%	-20%	n/a
10	**Mobility Artiflex** (Sanofi)	**1.9**	-17%	-30%	-21%
	Others	**25.9**	+41%	+90%	+37%

- Colflex Muscular soluble powder (hydrolysed collagen, hydroxymethylbutyrate, vitamin D; to help synthesis of muscle mass and reduce muscle degradation) and Colflex Hialu tablets (Bioiberica's b-2Cool non-hydrolysed type II collagen, Mobilee – a natural extract rich in hyaluronic acid, polysaccharides and collagen – plus MSM; for joint function and lubrication of synovial fluid) launched in 2021
- Like Condres, Colflex is supported by promotion to HCPs and to consumers via social media

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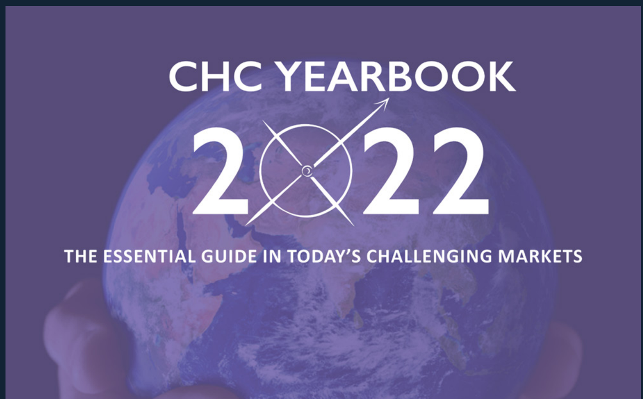

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