# **Analgesics 2022**

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

(344 Pages)

Definitions & methodology (2 pages)

# **Executive Summary** (23 pages)

# Global Overview (4 pages)

Global analgesics trends

Chart: Global analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Global analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Global analgesics sales by region mid-2022 (MSP, \$mn) Chart: Global leading analgesics markets mid-2022 (MSP, \$mn)

Chart: Net contribution of categories to global analgesics growth mid-2022 (MSP, \$mn) Chart: Global analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

Chart: Global leading analgesics marketers mid-2022 (MSP, \$mn)

# Systemic analgesics (5 pages)

Chart: Global systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Global leading systemic analgesics mid-2022 (MSP, \$mn)

#### Topical analgesics (4 pages)

Chart: Global topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Global leading topical analgesics mid-2022 (MSP, \$mn)

#### Mouth & dental analgesics (2 pages)

Chart: Global mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Global leading mouth & dental analgesics mid-2022 (MSP, \$mn)

#### Herbal & natural joint health supplements (3 pages)

Chart: Global herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

Chart: Global leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

# Switch, innovation & NPD (2 pages)

Analgesics market sees slowdown in launch activity and lack of genuine innovation

Chart: Global analgesics launch activity 2013-22

Chart: Global analgesics launch activity by category 2021-22

# Outlook, forecasts & opportunities (3 pages)

Chart: Global analgesics short-term forecast sales by region 2022-23 (MSP, \$mn)

Chart: Global analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Short-term forecast: Strong 2022 growth slows into 2023 Opportunities exist, strong long-term growth forecast

Chart: Global analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

Chart: Global forecast analgesics sales by region 2026-31 (MSP, \$mn)

# Australia (19 pages)

#### Overview (4 pages)

Analgesics trends in Australia

Chart: Australia analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Australia analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Australia leading analgesics marketers mid-2022 (MSP, \$mn)

Chart: Australia leading analgesics brands mid-2022 (MSP, \$mn)

Chart: Legal status of selected analgesic ingredients in Australia

Chart: Australia analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

### Systemic analgesics (5 pages)

Chart: Australia systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Australia leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Australia systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Australia systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

#### <u>Topical analgesics (4 pages)</u>

Chart: Australia topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Australia leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Australia topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Australia topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Australia topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

# Herbal & natural joint health supplements (3 pages)

Chart: Australia herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Australia leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

# Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Growth likely to slow

Chart: Australia analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Regulatory changes will drive innovation

Chart: Australia analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Brazil (25 pages)

### Overview (4 pages)

Analgesics trends in Brazil

Chart: Brazil analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Brazil analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Brazil leading analgesics marketers mid-2022 (MSP, \$mn) Chart: Brazil leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in Brazil

Chart: Brazil analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

# Systemic analgesics (8 pages)

Chart: Brazil systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Brazil leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Brazil systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Brazil systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

Innovative A+P for Neosaldina and Doril

#### Topical analgesics (5 pages)

Chart: Brazil topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Brazil leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Brazil topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Brazil topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Brazil topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

#### Mouth & dental analgesics (2 pages)

Chart: Brazil mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Brazil leading mouth & dental analgesics mid-2022 (MSP, \$mn)

# Herbal & natural joint health supplements (3 pages)

Chart: Brazil herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

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

# Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Slowdown predicted

Chart: Brazil analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Bright prospects for Brazilian analgesics market

Chart: Brazil analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Canada (17 pages)

#### Overview (4 pages)

Analgesics trends in Canada

Chart: Canada analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Canada analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Canada leading analgesics marketers mid-2022 (MSP, \$mn) Chart: Canada leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in Canada

Chart: Canada analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

# Regulations & classifications (1 page)

#### Systemic analgesics (4 pages)

Chart: Canada systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Canada leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Canada systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Canada systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

# Topical analgesics (4 pages)

Chart: Canada topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Canada leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Canada topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Canada topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Canada topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

# Herbal & natural joint health supplements (2 pages)

Chart: Canada herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Canada leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

#### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Growth will slow to pre-pandemic levels

Chart: Canada analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Regulatory reforms will reshape market

Chart: Canada analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# China (27 pages)

#### Overview (4 pages)

Analgesics trends in China

Chart: China analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: China analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: China leading analgesics marketers mid-2022 (MSP, \$mn) Chart: China leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in China

Chart: China analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

### Regulations & classifications (1 page)

# Systemic analgesics (8 pages)

Chart: China systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: China leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: China systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: China systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

Online stores and 24/7 home delivery service crucial for brand growth

GCE certification driving growth of generics segments

# Topical analgesics (7 pages)

Chart: China topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: China leading topical analgesics mid-2022 (MSP, \$mn)

Chart: China topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: China topical analgesics sales by format 2021 (MSP, \$mn)

Chart: China topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

Topical option for menstrual pain switched, creating new segment

Registration simplified for HK-Macau TCMs to be sold in China

# Mouth & dental analgesics (2 pages)

Chart: China mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: China leading mouth & dental analgesics mid-2022 (MSP, \$mn)

# Herbal & natural joint health supplements (3 pages)

Chart: China herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

Chart: China leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

New product launches with interesting ingredients and formulations

# Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Sales continues to be affected by Zero-Covid policy

Chart: China analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

GCE certification driving growth of generics segment

Chart: China analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

#### France (23 pages)

# Overview (4 pages)

Analgesics trends in France

Chart: France analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: France analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: France leading analgesics marketers mid-2022 (MSP, \$mn)

Chart: France leading analgesics brands mid-2022 (MSP, \$mn)

Chart: Legal status of selected analgesic ingredients in France

Chart: France analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (5 pages)

Chart: France systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: France leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: France systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: France systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

#### Topical analgesics (6 pages)

Chart: France topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: France leading topical analgesics mid-2022 (MSP, \$mn)

Chart: France topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: France topical analgesics sales by format 2021 (MSP, \$mn)

Chart: France topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

#### Mouth & dental analgesics (2 pages)

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

Key trends & developments

Chart: France leading mouth & dental analgesics mid-2022 (MSP, \$mn)

# Herbal & natural joint health supplements (3 pages)

Chart: France herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: France leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

#### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Topline sales forecast to stabilise

Chart: France analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Category set to become more consumerised

Chart: France analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Germany (22 pages)

# Overview (4 pages)

Analgesics trends in Germany

Chart: Germany analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Germany analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Germany leading analgesics marketers mid-2022 (MSP, \$mn)

Chart: Germany leading analgesics brands mid-2022 (MSP, \$mn)

Chart: Legal status of selected analgesic ingredients in Germany

Chart: Germany analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (5 pages)

Chart: Germany systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Germany leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Germany systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Germany systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

# Topical analgesics (5 pages)

Chart: Germany topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Germany leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Germany topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Germany topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Germany topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

# Mouth & dental analgesics (2 pages)

Chart: Germany mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Germany leading mouth & dental analgesics mid-2022 (MSP, \$mn)

#### Herbal & natural joint health supplements (3 pages)

Chart: Germany herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

Chart: Germany leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

# Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Dynamism gives way to steadier growth

Chart: Germany analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Steady yet unremarkable growth for a mature market

Chart: Germany analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# India (18 pages)

# Overview (4 pages)

Analgesics trends in India

Chart: India analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: India analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: India leading analgesics marketers mid-2022 (MSP, \$mn) Chart: India leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in India

Chart: India analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (4 pages)

Chart: India systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: India leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: India systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: India systemic analgesics sales by adult / children's presentations 2021 (MSP, \$mn)

#### Topical analgesics (5 pages)

Chart: India topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: India leading topical analgesics mid-2022 (MSP, \$mn)

Chart: India topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: India topical analgesics sales by format 2021 (MSP, \$mn)

Chart: India topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

### Herbal & natural joint health supplements (2 pages)

Chart: India herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: India leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

#### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: A+P will be key to continued growth

Chart: India analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Long-term effects of CHC reforms likely to be positive

Chart: India analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Italy (21 pages)

# Overview (4 pages)

Analgesics trends in Italy

Chart: Italy analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Italy analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Italy leading analgesics marketers mid-2022 (MSP, \$mn) Chart: Italy leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in Italy

Chart: Italy analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (5 pages)

Chart: Italy systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Italy leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Italy systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Italy systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

### <u>Topical analgesics (5 pages)</u>

Chart: Italy topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Italy leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Italy topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Italy topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Italy topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

#### Mouth & dental analgesics (2 pages)

Chart: Italy mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Italy leading mouth & dental analgesics mid-2022 (MSP, \$mn)

# Herbal & natural joint health supplements (2 pages)

Chart: Italy herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Italy leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

# Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Sales will normalise by 2023

Chart: Italy analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Steady, low growth forecast for analgesics market

Chart: Italy analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

#### Japan (21 pages)

# Overview (4 pages)

Analgesics trends in Japan

Chart: Japan analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Japan analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Japan leading analgesics marketers mid-2022 (MSP, \$mn) Chart: Japan leading analgesics brands mid-2022 (MSP, \$mn)

Chart: Legal status of selected analgesic ingredients in Japan

Chart: Japan analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (6 pages)

Chart: Japan systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Japan leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Japan systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Japan systemic analgesics sales by adult / children's presentations 2021

(MSP, \$mn)

#### <u>Topical analgesics (5 pages)</u>

Chart: Japan topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Japan leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Japan topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Japan topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Japan topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

### Herbal & natural joint health supplements (3 pages)

Chart: Japan herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Japan leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

#### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Topicals to revive while systemics slow

Chart: Japan analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Bright future for Japanese analgesics

Chart: Japan analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Poland (19 pages)

# Overview (4 pages)

Analgesics trends in Poland

Chart: Poland analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: Poland analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: Poland leading analgesics marketers mid-2022 (MSP, \$mn) Chart: Poland leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in Poland

Chart: Poland analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (5 pages)

Chart: Poland systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Poland leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: Poland systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Poland systemic analgesics sales by adult / children's presentations 2021 (MSP, \$mn)

#### Topical analgesics (4 pages)

Chart: Poland topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Poland leading topical analgesics mid-2022 (MSP, \$mn)

Chart: Poland topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: Poland topical analgesics sales by format 2021 (MSP, \$mn)

Chart: Poland topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

# Mouth & dental analgesics (2 pages)

Chart: Poland mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: Poland leading mouth & dental analgesics mid-2022 (MSP, \$mn)

#### Herbal & natural joint health supplements (1 page)

Chart: Poland herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

Chart: Poland leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

#### Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Topline sales growth forecast to slow

Chart: Poland analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Expanding nascent segments key to growth

Chart: Poland analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

#### **UK** (23 pages)

# Overview (4 pages)

Analgesics trends in UK

Chart: UK analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: UK analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: UK leading analgesics marketers mid-2022 (MSP, \$mn) Chart: UK leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in UK

Chart: UK analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (6 pages)

Chart: UK systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: UK leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: UK systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: UK systemic analgesics sales by adult / children's presentations 2021 (MSP, \$mn)

#### Topical analgesics (6 pages)

Chart: UK topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: UK leading topical analgesics mid-2022 (MSP, \$mn)

Chart: UK topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: UK topical analgesics sales by format 2021 (MSP, \$mn)

Chart: UK topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

Increasing competition in diclofenac segment, especially for Voltarol

#### Mouth & dental analgesics (2 pages)

Chart: UK mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: UK leading mouth & dental analgesics mid-2022 (MSP, \$mn)

Herbal & natural joint health supplements (2 pages)

Chart: UK herbal & natural joint health supplements sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: UK leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

Outlook, forecasts & opportunities (2 pages)

Short-term forecast: NHS delays to pain treatment drive demand

Chart: UK analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Mature market forecast to grow modestly

Chart: UK analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# USA (28 pages)

### Overview (4 pages)

Analgesics trends in USA

Chart: USA analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Chart: USA analgesics sales by category mid-2022, plus herbal & natural joint health

supplements (MSP, \$mn)

Chart: USA leading analgesics marketers mid-2022 (MSP, \$mn) Chart: USA leading analgesics brands mid-2022 (MSP, \$mn) Chart: Legal status of selected analgesic ingredients in USA

Chart: USA analgesics sales by pharmacy / non-pharmacy channel 2021 (MSP, \$mn)

#### Regulations & classifications (1 page)

#### Systemic analgesics (8 pages)

Chart: USA systemic analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: USA leading systemic analgesics mid-2022 (MSP, \$mn)

Chart: USA systemic analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: USA systemic analysics sales by adult / children's presentations 2021 (MSP, \$mn)

#### <u>Topical analgesics (8 pages)</u>

Chart: USA topical analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: USA leading topical analgesics mid-2022 (MSP, \$mn)

Chart: USA topical analgesics sales by ingredient 2021 (MSP, \$mn)

Chart: USA topical analgesics sales by format 2021 (MSP, \$mn)

Chart: USA topical analgesics sales by medicated / non-medicated presentations 2021

(MSP, \$mn)

#### Mouth & dental analgesics (2 pages)

Chart: USA mouth & dental analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

Key trends & developments

Chart: USA leading mouth & dental analgesics mid-2022 (MSP, \$mn)

Herbal & natural joint health supplements (3 pages)

Chart: USA herbal & natural joint health supplements sales mid-2021 & mid-2022

(MSP, \$mn)

Key trends & developments

Chart: USA leading herbal & natural joint health supplements mid-2022 (MSP, \$mn)

Outlook, forecasts & opportunities (2 pages)

Short-term forecast: Growth to cool after pandemic boost

Chart: USA analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

Arthritis treatments key to future growth

Chart: USA analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# Scientific Studies in Pain Relief (10 pages)

# Latest findings (6 pages)

Broad body of clinical research points to effectiveness of both established and emerging ingredients

### CBD's role in pain relief (4 pages)

Greater body of evidence required to conclude that CBD offers pain relief benefit Chart: Selected completed studies assessing effectiveness of CBD for chronic pain

Chart: CBD market key data

# **Brand Case Studies** (10 pages)

#### Nurofen (2 pages)

World's first ibuprofen OTC continues to innovate

Chart: Nurofen analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

# Panadol (2 pages)

Care-focused A+P in Australia drives growth

Chart: Panadol analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

# Tylenol (3 pages)

Tylenol building international presence on strength of heritage

Chart: Tylenol analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

# Voltaren (3 pages)

Voltaren builds presence via strong international branding

Chart: Voltaren analgesics sales mid-2021 & mid-2022 (MSP, \$mn)

# Outlook (15 pages)

#### Global short-term forecast (1 page)

Chart: Global analgesics short-term forecast sales by region 2022-23 (MSP, \$mn) Chart: Global analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

# Global long-term forecast (2 pages)

Numerous opportunities for innovation

Chart: Global analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

Chart: Global forecast analgesics sales by region 2026-31 (MSP, \$mn)

#### Asia-Pacific short-term forecast (1 page)

Chart: Asia-Pacific analgesics short-term forecast sales by country 2022-23 (MSP, \$mn) Chart: Asia-Pacific analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

# Asia-Pacific long-term forecast (2 pages)

Chart: Asia-Pacific forecast analgesics sales by country 2026-31 (MSP, \$mn) Chart: Asia-Pacific analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

# North America short-term forecast (1 page)

Chart: North America analgesics short-term forecast sales by country 2022-23 (MSP, \$mn) Chart: North America analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

#### North America long-term forecast (1 page)

Chart: North America forecast analgesics sales by country 2026-31 (MSP, \$mn) Chart: North America analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

#### Western Europe short-term forecast (1 page)

Chart: Western Europe analgesics short-term forecast sales by country 2022-23 (MSP, \$mn) Chart: Western Europe analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

# Western Europe long-term forecast (2 pages)

Chart: Western Europe forecast analgesics sales by country 2026-31 (MSP, \$mn) Chart: Western Europe analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)

#### Latin America short-term forecast (1 page)

Chart: Latin America analgesics short-term forecast sales by country 2022-23 (MSP, \$mn) Chart: Latin America analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

#### Latin America long-term forecast (1 page)

Chart: Latin America forecast analgesics sales by country 2026-31 (MSP, \$mn)

Chart: Latin America analgesics 5 & 10 year forecast sales by category 2026 & 2031

(MSP, \$mn)

# <u>C&E Europe short-term forecast (1 page)</u>

Chart: C&E Europe analgesics short-term forecast sales by country 2022-23 (MSP, \$mn) Chart: C&E Europe analgesics short-term forecast sales by category 2022-23 (MSP, \$mn)

# <u>C&E Europe long-term forecast (1 page)</u>

Chart: C&E Europe forecast analgesics sales by country 2026-31 (MSP, \$mn) Chart: C&E Europe analgesics 5 & 10 year forecast sales by category 2026 & 2031 (MSP, \$mn)