



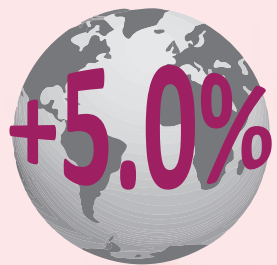
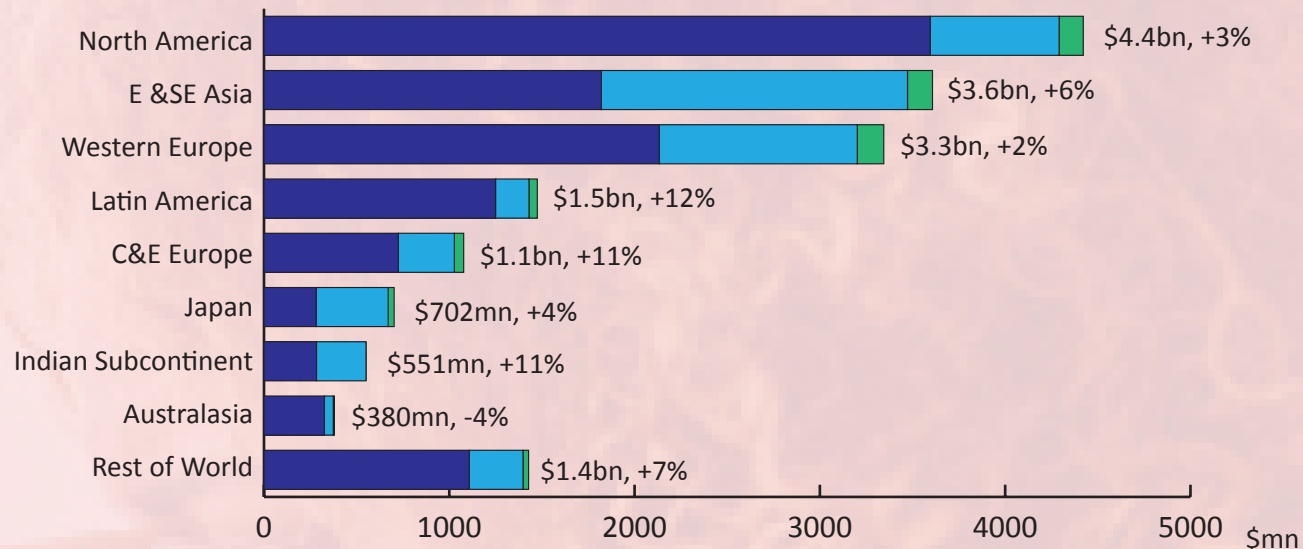
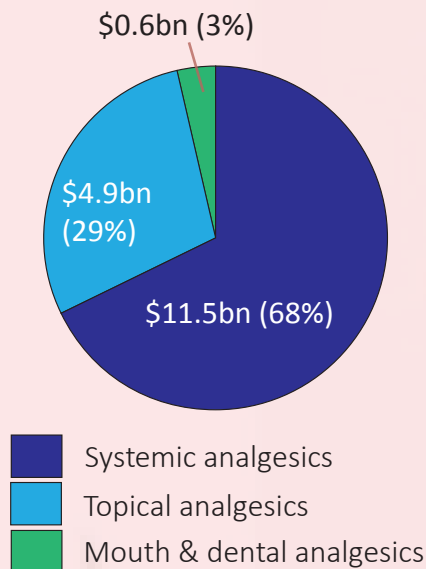
ANALGESICS

The Evolving Self-Care Market for Pain Relief

KEY FEATURES

- An in-depth exploration of the **Analgesics** market, including **Systemic analgesics**, **Topical analgesics** and **Mouth & dental analgesics**, plus **supplements** positioned for pain relief
- Coverage of **16 major markets** from across the globe, with topline sales, brand performances, new developments, launches and promotional campaigns
- **Mid-year 2017 sales** from the newly-updated **DB6**, our dedicated OTC sales database
- **Major category sales** segmented by ingredient in each country
- **Case studies** of key Analgesics brands, highlighting success factors, sales, NPD and A+P activity
- **Forecast** sales for all categories and countries, plus predictions for the future

Global Analgesics sales by region in the year to mid-2017



With global sales of \$17bn in the year to mid-2017, the combined categories of **Systemic analgesics**, **Topical analgesics** and **Mouth & dental analgesics** grew by 5.0% on the previous year, significantly outpacing the global over-the-counter market (+4.6%).

Topicals (+8%) continue to outpace systemics (+4%), driven by high levels of innovation and low levels of private label competition.

Driving growth are **higher-dose NSAIDs** (despite some reverse-switches and restrictions on pack sizes), **new ingredient combinations** and **fast-acting products**. A trend for **smaller packs** is intended to attract low-income or on-the-go consumers.

Despite high growth, the analgesics market faces challenges. Global calls for **restrictions on NSAIDs** such as diclofenac, owing to risks of cardiovascular events, have led to pack size restrictions and reviews of classification. Other **regulatory hurdles** include tighter regulations on codeine (e.g. label warnings, smaller pack sizes, etc.), with the ingredient reverse switched in systemic analgesics in several countries such as Australia, Belgium, Russia and most recently France.

Key questions investigated in this report

- What are the key drivers of growth in Analgesics, and what are the key trends to look for in future?
- Which marketers and brands outperform the market and what lessons can be learned?
- Where are the strongest opportunities for future growth?
- Will Switch and NPD benefit Analgesics in the years ahead?
- Do new studies shed light on promising growth areas?

Scientific studies

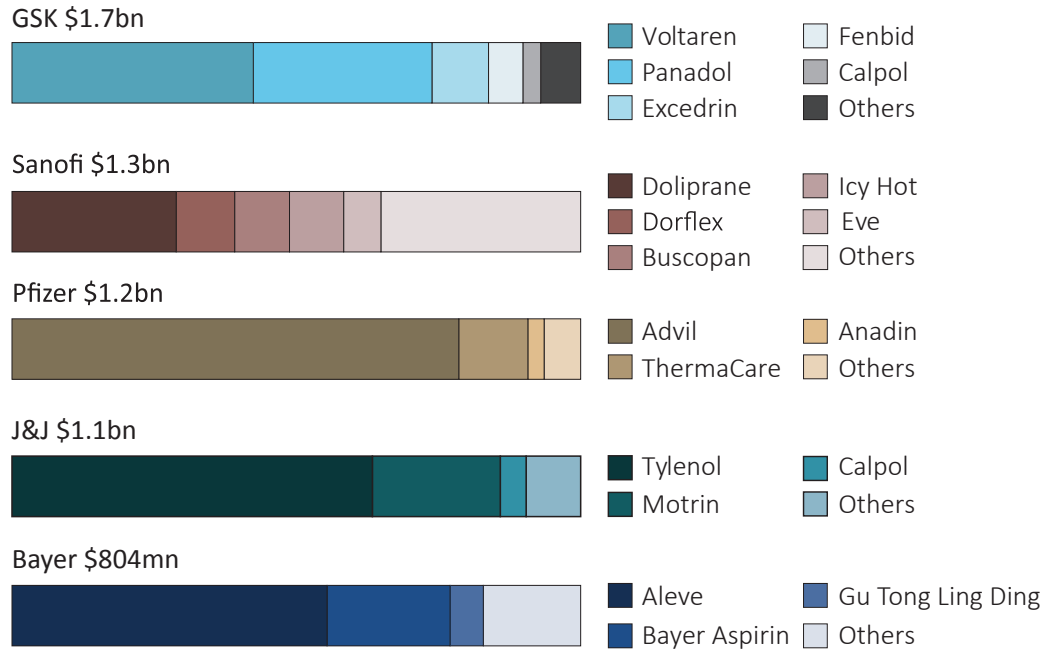
The report includes an in-depth look at the latest Scientific Studies, such as recent findings that “wake-promoting” ingredients like caffeine may reduce chronic pain induced by sleep loss, and that cannabinoids are as suitable as other medicines for the prevention of migraine.

Webinar on key findings



Purchase the global licence and gain access to a webinar in which the Nicholas Hall team will run through the key findings from the report.

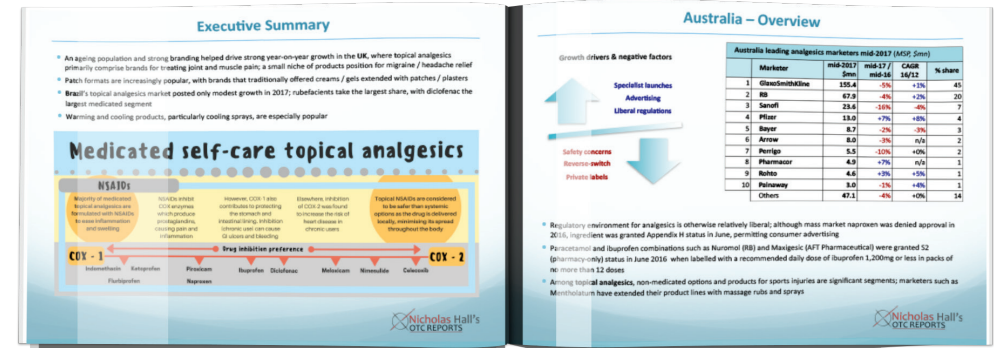
Top 5 Analgesics marketers by leading brands in 2016



The leading five **Analgesics** players posted average growth of 4.9% in 2016, but this masks a diverse range of performances from players and their key brands. Discover how individual marketers and brands performed, both globally and in specific markets, and where the truly dynamic growth is coming from.

Data analysis within each country profile includes a breakdown of **sales by key ingredient**.

With a high degree of launch activity among analgesics, **new product developments** are explored across markets, as well as a look at **adjacencies** such as wearable devices (TENS, heat therapy, etc.). The report also investigates **herbal & natural supplements** positioned for pain relief.



Main features of the report

- An in-depth exploration of the **Analgesics** market, including **Systemic analgesics**, **Topical analgesics** and **Mouth & dental analgesics**, plus **supplements** positioned for pain relief
- Coverage of **16 major markets** from across the globe, with topline sales, brand performances, new developments, launches and promotional campaigns
- Mid-year 2017 sales** from the newly-updated **DB6**, our dedicated OTC sales database
- Major category sales** segmented by ingredient in each country
- Case studies** of key Analgesics brands, highlighting success factors, sales, NPD and A+P activity
- Forecast sales** for all categories and countries, plus predictions for the future

All the factors affecting the **Analgesics** market are highlighted, from consumer trends and regulatory changes to A+P campaigns and new product launch activity. The report features the latest mid-year 2017 sales data from our dedicated **DB6** database, including topline historical sales by region, country and category, individual brand performances and forecasts to 2021 and 2026.

Categories covered by this report

Systemic analgesics • Topical analgesics
Mouth & dental analgesics
PLUS
Herbal & natural supplements positioned for pain relief

16 individual markets profiled in this report

Asia-Pacific



Americas



Europe



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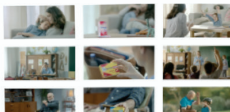
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Analgesics: The Evolving Self-Care Market for Pain Relief

France – Systemic analgesics

- TV ads for the Doliprane range carried the tagline “An ally against pain”
- The tagline appeared in a website (contreladoulneur.fr) launched by Sanofi in early 2017, to provide information and support for consumers suffering from chronic pain, plus a section for HCPs
- Sanofi’s CoDoliprane Adultes (paracetamol, codeine) is now Rx following the reverse switch of codeine in 2017
- Upps / BMS fields No.2 and No.3 brands, paracetamol-formulated Dafalgan and Efferalgan
- Dafalgan has a largely ethical positioning, with most options reimbursed at 65% when prescribed
- Efferalgan, meanwhile, has a new pure OTC focus, with Upps / BMS remaining reimbursed options EfferalganSed, while pure OTC versions EfferalganTab (1,000mg tabs) and EfferalganOde (500mg orodispersible tablets) were renamed Efferalgan
- All pure OTC options are now eligible for self-selection in pharmacies, and have been supported with frequent TV and print ads focusing on orodispersible sachet options and stressing suitability for on-the-go use, carrying tagline “No glass, no water – effective wherever you are”
- Paracetamol brands face competition from generics, notably from Biogaran / Servier, Mylan and PGT / P&G (for Teva)
- However, Doliprane, Dafalgan and Efferalgan avoided inclusion in the generic directory (which would have allowed automatic generic prescription of the brands when prescribed) after marketers agreed to price cuts in 2015




TV ads showed different Doliprane presentations able to treat a range of body pains



Brand Case Studies

Neosaldina (Nycomed / Takeda)

- No.3 systemic analgesic in Brazil, headache treatment
- Neosaldina is promoted as “Brazil’s favourite headache remedy”
- It has retained its position in the face of growing competition from generics and similar as well as dynamic launch Dori Enequaca (Cosmed / Hypermarcas)
- Brand uses proprietary “XTRAX” formulation, combining metamizole, isometheptene mucate and caffeine, to provide fast-acting relief from headache
- “Thinking Heads” A/P campaign, featuring TV presenter and model Fernanda Lima, promotes the brand to women with high-stress lifestyles and jobs, and brand site neosaldina.com.br features male- and female-specific advice on the causes of pain conditions including headaches
- Promotion also includes the “Neosapp” health information smartphone app
- Although brand has seen limited line extension, with only one formula and two formats available, wide range of pack sizes including 1, 4 and 10-count blister packs and 20- and 30-count boxes gives it wide appeal across different income groups



Neosaldina analgesics sales (MSP, \$mn)

Year	2012	2013	2014	2015	2016
Sales	47.9	54.1	56.8	68.0	63.1
% Change		+13%	+5%	+18%	-7%

Neosaldina leading analgesics markets mid-2017* (MSP, \$mn)

Country	mid-2017 \$mn	mid-17 / mid-16 % change	CAGR	% share
Brazil	69.3	+9%	+7%	100

* excludes global Top 20 OTC markets only

Success factors: Neosaldina’s strength comes from its established reputation in the headache segment; proprietary fast-acting formula provides resilience against generic metamizole competition.

Executive Summary

Overview of the core trends and developments, including growth drivers in each category, and the leading marketers & brands

Leading Markets

16 markets profiled in individual chapters across Asia-Pacific, Europe and Americas, with topline sales, brand performances, new developments, launches and ad campaigns

Scientific Studies

The role of studies in health & safety concerns, plus medicines and supplements under the scientific spotlight, and a look at medical cannabis

Brand Case Studies

Profiles of Advil, Doliprane, Loxonin, Motrin, Neosaldina, Nurofen, Salopas and Voltaren, highlighting success factors, sales, line extensions and promotional activity

Outlook

Global outlook for analgesics, with forecasts by region and country, plus Rx-to-OTC Switch prospects, and Opportunities & Threats

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Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in consumer healthcare, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

Latest Nicholas Hall Reports:



Rx-to-OTC Switch - Success Strategies & Opportunities

This updated edition of the best-selling 2014 report again features the knowledge and insight of Switch expert Joseph McGovern along with Nicholas Hall's industry expertise and sales data.

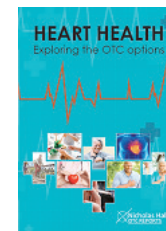
Publish date: November 2017



Cold & Flu

This report is an in-depth exploration of the OTC Cold & Flu market, including Systemic cold & flu, topical decongestants and chest rubs & inhalants, plus VMS brands positioned for immunity.

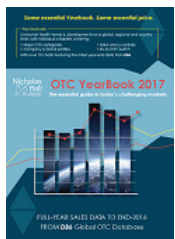
Publish date: August 2017



Heart Health

More people die annually from cardiovascular diseases than from any other cause. This report takes an in-depth look at the self-care options, giving insight into the latest trends with detailed market analysis.

Publish date: June 2017



Nicholas Hall's OTC YearBook 2017

Nicholas Hall's bestselling unique reference book contains comprehensive market data through December 2016 drawn from our **DB6** Global OTC database.

Publish date: April 2017



Healthy Ageing

With the population structure shifting to a new dynamic and the proportion of those aged over 50 steadily increasing, it's essential that OTC marketers cater to the specific health needs associated with older age.

Publish date: February 2017



OTC Dermatologicals

Covering categories as diverse as acne remedies, antifungals, wound care, cold sore treatments, eczema, lip care and hair loss, this essential report covers OTC Derma across 15 major markets.

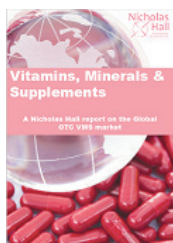
Publish date: November 2016



Eye Health

Eye Health is a market driven by innovation, environmental factors, an ageing population and changing lifestyles, making it a fascinating topic for this new report, covering 14 leading markets.

Publish date: September 2016



Vitamins, Minerals & Supplements

Dedicated to the largest consumer healthcare category, this report breaks down the global VMS market into detailed country profiles, with analysis of regulatory changes and their implications.

Publish date: July 2016

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