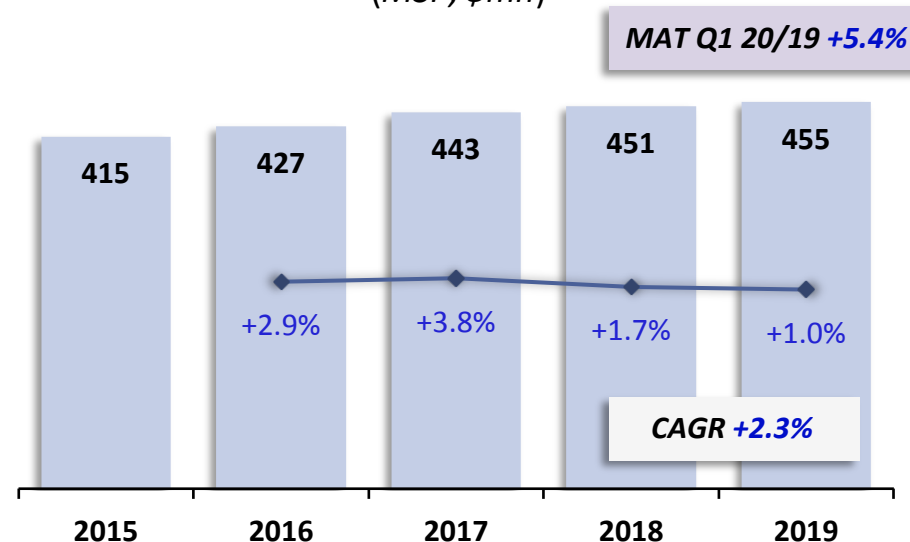


Canada – Overview

Topline analgesics trends & developments

- **Strong performances for topicals**, particularly established brands such as Voltaren and LivRelief, offset flatter systemics and declining mouth & dental category 2015-19
- **Private labels are a significant presence** in analgesics, accounting for around 30% of systemics topline
- Canadian market sees relatively little innovation in analgesics, and **shift in regulatory focus towards tighter controls** may further restrict opportunities
- Reverse-switch of low-dose codeine was proposed in 2019 and the **regulatory status of ibuprofen and paracetamol combinations (a potential new segment)** remains under debate
- **Withdrawal of infant benzocaine products** has significantly impacted mouth & dental category
- **Cannabis is a potential bright spot in topical analgesics**, with marketers capitalising on Canada's liberal approach to the ingredient, although permitted health claims remain limited

Canada analgesics sales 2015-19
(MSP, \$mn)



Canada analgesics sales by category 2019
(MSP, \$mn)

Category	2019	19/18	CAGR 19/15	MAT Q1 20/19
Systemic analgesics	384.2	+0%	+2%	+6%
Topical analgesics	67.5	+4%	+7%	+3%
Mouth & dental analgesics	3.4	-3%	-3%	+0%
Total	455.1	+1%	+2%	+5%

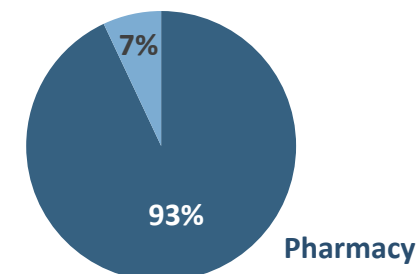
Germany – Overview

Legal status of key analgesic ingredients in Germany

Ingredient	Status	Additional notes
almotriptan	P	Over-18s only, after prior diagnosis of migraine. Max dose 12.5mg. Max pack size 25mg
benzocaine	P	Topical and oral topical use
codeine	Rx	
diclofenac (systemic)	P	Max dose 25mg. Max daily dose 75mg
diclofenac (topical)	P	Max strength 5%
felbinac	P	
flurbiprofen	P	Lozenges. Oral topical use. Max daily dose 50mg
ibuprofen (systemic)	P	Max dose 400mg. Max daily dose 1,200mg
ibuprofen (topical)	P	Max strength 5% (patch 6%). Max pack size 60g
ketoprofen (systemic)	Rx	
ketoprofen (topical)	Rx	
lidocaine	P	Topical and oral topical use
naproxen	P	Systemic use. Max dose 250mg. Max daily dose 750mg. Max pack size 7,500mg
naratriptan	P	Over-18s only, after prior diagnosis of migraine. Max dose 2.5mg. Max pack size 5mg
paracetamol	P	Max dose 1,000mg. Max pack size 10,000mg
piroxicam	P	Topical use
sumatriptan	Rx	

Germany analgesics sales by channel 2019 (MSP, \$mn)

Non-pharmacy



Systemic analgesics



Topical analgesics



Mouth & dental analgesics



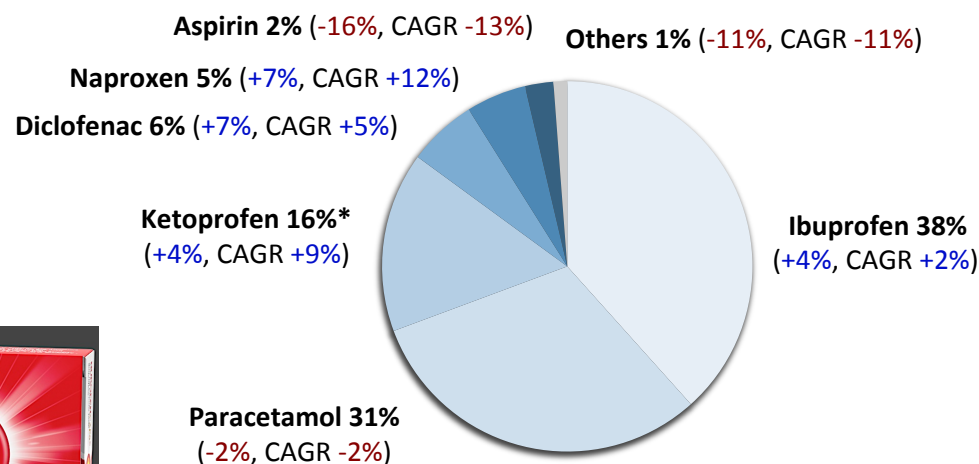
Distribution: OTCs largely sold in pharmacies only, with restrictive pharmacist-led environment; online channel expanding

Italy – Systemic analgesics

- Ibuprofen-formulated **Nurofen** was one of the category's star performers
- Nurofen Febbre e Dolore oral suspension, which is aimed mainly at children, accounts for nearly 70% of total brand sales and posted strong growth despite strong competition from parallel imports
- Overall brand growth was driven by NPD in 2018, including Nurofenkid Febbre e Dolore chewable caps (ibuprofen 100mg), Nurofenteen mint flavour orodispersible tablets (joining the lemon flavour) and NurofenCaps soft capsules (ibuprofen 400mg)
- In April 2019 Nurofenelle, positioned for menstrual pain, was discontinued
- Leading ketoprofen brand **Okitask** is supported with high-profile consumer promotion, which highlights the brand's strong positioning for headache and claim to start working in five minutes
- 2019-20 TV ads focused on on-the-go use orodispersible granules, which grew in 2019 and cannibalised brand tablet sales

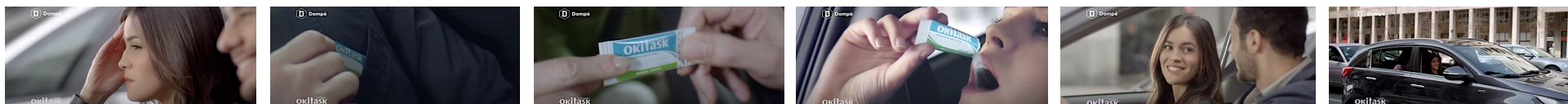


Italy systemic analgesics sales by ingredient 2019
(MSP, \$mn)



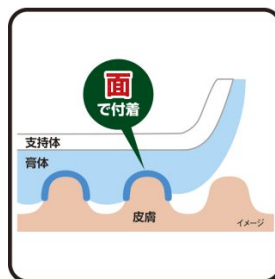
*Including dexketoprofen options

Pie reflects identified brands, worth \$236.5mn;
Others includes paracetamol + butylscopolamine,
aspirin + paracetamol, among others

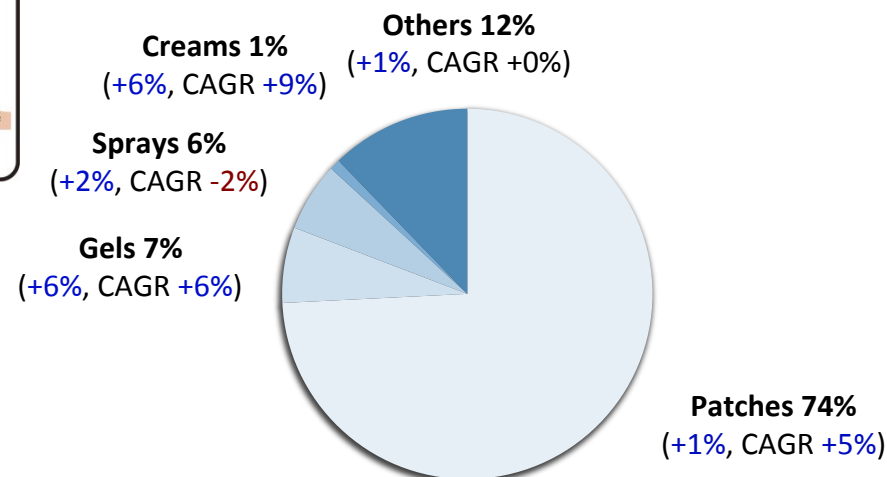


Japan – Topical analgesics

- Brand uses proprietary “Transdermal Innovated Aqueous Adhesive System”, which combines water-based and non-aqueous patch technology to improve comfort and adhesion (*see right*)
- 2018 saw launch of **Vantelin Kowa Heat Supporters** warming joint supports
- Voltaren** is well-diversified across formats, with patches, gel, spray and lotion available; TV ads target women suffering from back & shoulder pain

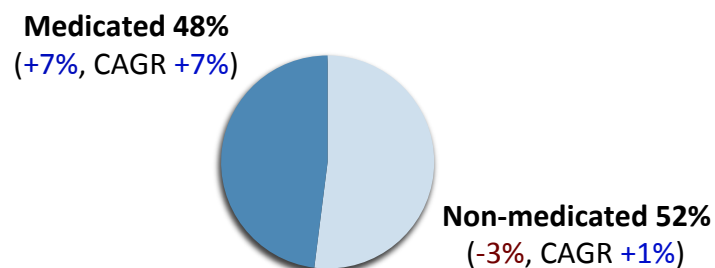


Japan topical analgesics sales by format 2019 (MSP, \$mn)



Pie reflects total category sales, worth \$449.4mn

Japan topical analgesics sales by medicated / non-medicated presentations 2019 (MSP, \$mn)



Pie reflects total category sales, worth \$449.4mn

- Roihi** was extended in 2018 with felbinac and l-menthol combination **Cream Felbinac**, claimed to be Japan’s first analgesic roll-on cream
- 2018 also saw brand extended with **Plaster Felbi Compact**, felbinac 5g plasters for the neck and shoulders marketed to office workers aged 20-50
- Roihi line also stands out from competitors by availability of smaller, discreet patches

