

Analgesics

From Pain to Gain: Unlocking Opportunities in the Self-Care Analgesics Market

Key features of this report:

- An in-depth exploration of the pain relief market, including **Systemic analgesics**, **Topical analgesics** and **Mouth & dental analgesics**
- **Coverage of 16 major markets** from across the globe, with topline sales, brand performances, latest developments, launches and promotional campaigns
- Key VMS adjacency **joint health supplements** also investigated
- Very latest **year-end 2024 sales** from **DB6**, our dedicated CHC sales database, plus historical growth rates back to 2020 and **mid-2025 topline growth** across categories
- Category sales **segmented by ingredient** in each country
- **Internet & mail order channel sales** for every market profiled
- Coverage of **marketer activity**, highlighting strategies and success factors, sales, NPD activity and consumer & HCP promotion
- A look to the future includes long-term **forecast sales** for all categories and countries to 2029 & 2034, plus the most up-to-date short-term forecasts (to 2025 & 2026)

Analgesics globally have sustained steady growth in recent years, albeit slowing as purchasing patterns returned to normal post-Covid. Systemics show a trend towards faster-acting, more convenient options, while combinations and new switches expand the category in selected markets. Incidence of cold & flu, which varies considerably between markets, has been a strong influence, with paediatric fever relievers particularly hard hit in areas of low incidence. Topicals benefit from rising participation in active pursuits, a growing elderly population and new products to relieve menstrual discomfort.

Internet & mail order sales continue to grow more dynamically than store retail, seeing the channel account for a growing share, as several top-tier analgesics enjoy standout online channel growth. In an effort to differentiate brands, A+P has targeted both ends of the age spectrum, with a mix of promotional strategies and media employed, with inclusivity and social responsibility increasingly to the fore.

NPD focus varies across markets. Recent launch activity has seen the world-first switch of celecoxib in Australia, Germany's first dexibuprofen launch and the main cough & cold franchise enter both systemic and topical analgesics in USA. Format innovation includes easy-to-swallow and mini-capsule options, plus nasal sprays, massage balls and pen applicators, while niche products for demographics as diverse as teenagers, office workers, sports enthusiasts and even pickleball players are expanding the category. Meanwhile, established analgesics brands are increasingly crossing into joint health supplements.

Forecast sales for Analgesics are largely consistent with previous growth, so where can marketers look to find dynamism in this mature market? How will they take advantage of the latest trends & developments or expand their offerings to exploit new niches?

This report investigates pressing issues affecting Analgesics globally, digging into multiple areas of interest and highlighting inherent opportunities. Examining 12 core markets in detail (and additional key markets in brief), analysing brand performances and launch activity, our **Analgesics** report investigates the untapped potential in this CHC category.

Categories covered in this report include:

Systemic analgesics • Topical analgesics • Mouth & dental analgesics
Joint health supplements[†]

[†] sales tracked under VMS in DB6

12 individual markets profiled in depth

Australia • Brazil • China • France • Germany
India • Italy • Japan • Mexico • Poland • UK • USA

Plus additional markets in brief

Canada • Russia • S Korea • Spain

This report features the latest end-2024 sales data from our dedicated **DB6** database, including **topline historical sales globally**, by country and category, as well as individual brand performances, and **long-term forecasts to 2029 and 2034**. Coverage extends to the online channel, with **internet & mail order sales** of Analgesics included in the topline and a dedicated section in each country profile.

Diving into the factors affecting individual **Analgesics** markets, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, this report sheds light on trends & developments across **12 in-depth country profiles** with insights and predictions, as well as **shorter profiles of other key markets**.

Key questions investigated in this report

What can be learned from the most successful analgesics marketers & brands?

Has NPD benefited the market and does it offer a route to growth?

Which markets show the most promise based on competitive landscape, consumer preferences, e-commerce environment and future drivers?

Can new niches and underserved demographics be identified?

Does the adjacent category of joint health supplements merit exploring?

What is the outlook for Analgesics and where can opportunities be found?

Data analysis within each country profile includes a breakdown of 2024 **sales by key ingredient** in Systemic analgesics and Topical analgesics.

The important adjacent category of **joint health supplements**, where NPD has helped drive category expansion, is also investigated.

Assessing the short-term outlook, the report includes **full-year 2025 & 2026 forecasts for all categories** in each market profiled.

With launch activity in Analgesics slowing year on year, has the impetus shifted from quantity to quality? **New product development** is explored across markets, including Rx-to-OTC switches, delivery format innovations, new benefits and more.

FREE Webinar of the report's key findings & topline takeaways!

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Analgesics

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USA Topical analgesics Blue-Emu – formulated with aloe vera-based emu oil – also targeted pickleball players, with video ads showing amateur players using the product and the voiceover stating “Blue-Emu Original cream keeps your muscles and joints game-ready for the friendly competition” - Meanwhile, in June 2025 Compass launched Picklebalm, available in roll-on, cream and balm stick formats (all formulated with lidocaine 4% menthol 1%); the marketer claims the product is “the only pain relief product made specifically for... the rapidly-growing pickleball community” Absorbine Jr grew well, aided by the early 2023 launch of Plus Pain Relief Knee Patch and Targeted Micro Patch, both menthol 7% + camphor 7%, followed in August 2023 by the Plus Pain Relief cream and roll-on (Ibuprofen 4%, lidocaine 4%, menthol 1.5%); video ads for the latter describe it as “the only solution with two max-strength anesthetics” that delivers “the strongest numbing pain - Systemic brand Aleve made a camphor, lotion with rollerball (diclofenac, 50.1mm, -87%); AI - In summer 2023, Kenvue took Precise line (\$6.8m, +35%), which were joined in 2024 by 4%, menthol 1.25%, plus lavender - These feature a rollerball apply muscle pain in areas such as t when applied 3-4x daily; the n leave any residue on skin or cl - In summer 2025, the Tylenol F which can be used by adults     	Germany Systemic analgesics - Despite celebrating its 125th anniversary in 2024, Bayer Aspirin was unable to arrest its continued sales decline - April 2025 launch of a high-strength version, Aspirin Forte, Germany's first aspirin 1g, may revive its fortunes; it is positioned for migraine and tension headache (vs general pain in the core version), but is double the strength of Aspirin Betapharm / Dr Reddy's early 2025 extension of mid-level Ibubeta via strawberry-flavour liquid sticks in 200mg (6+ years / 20kg) and 400mg (12+ years / 40kg+) strengths was the first liquid ibuprofen stick on the market, backed by data that underlined suitability for on-the-go use - Among triptans, Ferrimigran (PharmaSGP; naratriptan; -2%) lost out to sumatriptan-based generic options from Ratopharm (Teva; \$0.7m, +36%) and Hexal (Sandoz; \$0.6m, +20%) - Despite the May 2024 Rx-to-OTC switch of rizatriptan 5mg in solid formats, no products have yet launched Lower-tier Neurigen (Dr Pfleger; \$2.8m, -13%) was unable to arrest its continued decline, despite October 2023 launch of Neurigen PAC, the first combination of aspirin 100mg, paracetamol 250mg and caffeine 65mg on the market (and slightly stronger dosage than core Neurigen), indicated to relieve headaches and migraines - Among naturals, two feverfew tablet presentations launched in early 2025: Apomedica's Dr Böhm Mutterkraut and Angelini's Mutterkraut Heumann (both feverfew 200mg); digital ads for the latter outlined how noise, bright light and the weather can trigger migraine and how the product can help prevent it developing or reduce its intensity     	China Internet & email data collection - By Health noted in its 2024 financial report that livestreaming has become one of the main growth drivers of China's wider e-commerce industry - One of the significant developments in this area is Tencent's integration of video account e-commerce with its WeChat advertising system, allowing for video account livestreams to be promoted within Moments; the new feature provides brands with new avenues for traffic acquisition, boosting conversion rates by shortening the consumer journey from ad click to purchase - The integration extends beyond advertising, as various e-commerce formats within the WeChat ecosystem, such as social commerce and mini-program commerce, are also linked to video account e-commerce - Below are screenshots of examples of products promoted and sold via livestreaming:    	India Topical analgesics Indexx was extended in 2023 with a high-strength diclofenac presentation, Indexx UltraGel, although majority of consumer promotion focuses on non-medicated presentations such as Rapid Action Spray, Pain Relief Balm and Muscle Cream Cream - TV ads focus on Muscle Cream presentation, highlighting how it can give users “the strength to keep going” at work Enami Menthx Plus Balm is promoted as “the headache relief expert” and was extended in December 2024 with Menthx Plus Balm Total, which expanded the brand's positioning outside headache to encompass all types of body pain and cold symptoms Dr Ortho range has seen high levels of NPD 2024-25 building both its portfolio of medical devices for joint support and its range of pain relief options: launches include Acupressure Slippers for foot pain that improve circulation, joint support braces for knee and back & neck pain and a wintergreen + camphor pain relief roll-on - Topical pain relief options also include Ayurvedic oils and sprays, with combination SKUs bringing together herbal therapies and devices for a complete joint care regimen     India topical analgesics sales by ingredient 2024 (MSP, \$m) Other 3% (+8.4%, CAGR +32.8%) Rubefactant 26% (+0.8%, CAGR +2.3%) Ayurvedic 43% (+1.8%, CAGR +1.3%) Diclofenac 28% (+2.3%, CAGR +4%) Others comprises ketoprofen, nitroglycerin, among others
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