

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 PRO Pain Relief cream and roll-on (lidocaine 4%, phenol 1.5%); video ads for the latter describe it as “the only solution with two max-strength anaesthetics” that delivers “the strongest numbing pain relief available”



- Systemic brand **Aleve** made a splash in the topicals category in 2021 with the launch of AleveX (menthol, camphor; lotion with rollerball applicator and spray formats; \$7.4mn, -35%) and Aleve Arthritis Pain Gel (diclofenac; \$0.1mn, -87%); latter did not appear to be available for sale at time of going to press
- In summer 2023, Kenvue took Tylenol back into the topicals category (range previously discontinued in 2014) via the **Tylenol Precise** line (\$6.9mn, +355%), including Lidocaine 4% Pain Relieving Cream and Cooling Pain Cream (lidocaine 4%, menthol 1%), which were joined in 2024 by a Warming version (lidocaine 4%) and in spring 2025 by Nighttime Pain Relieving Cream (camphor 4%, menthol 1.25%, plus lavender, cucumber and sandalwood scents to help consumers relax before sleep)
- These feature a rollerball applicator claimed to provide penetrating relief for minor joint & muscle pain in areas such as the back & shoulders, legs, hips, knees and ankles & elbows when applied 3-4x daily; the marketer claims the fast-absorbing, non-sticky creams do not leave any residue on skin or clothes
- In summer 2025, the Tylenol Precise range was extended with a patch format (lidocaine 4%), which can be used by adults and children aged 12+ years for up to 12 hours



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 Migräne
- Betapharm / Dr Reddy's early 2025 extension of mid-tier **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 trade ads that underlined suitability for on-the-go use
- Among triptans, **Formigran** (PharmaSGP; naratriptan; -2%) lost out to sumatriptan-based generic options from Ratiopharm (Teva; \$0.7mn, +36%) and Hexal (Sandoz; \$0.6mn, +20%)



- Despite the May 2024 Rx-to-OTC switch of rizatriptan 5mg in solid formats, no products have yet launched
- Lower-tier **Neuralgin** (Dr Pfleger; \$2.8mn, -13%) was unable to arrest its continued decline, despite October 2023 launch of Neuralgin PAC, the first combination of aspirin 250mg, paracetamol 250mg and caffeine 65mg on the market (and slightly stronger dosage than core Neuralgin), 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



Mid-2025 sales update MAT Q2 2025: +0.7%

A flattening of systemic analgesics sales in the 12 months to mid-2025 owed largely to sluggish unit sales and several top-tier brands seeing value sales fall, including Ibuflam, Thomapyrin, Buscopan Plus, Dolormin, Ibuhexal and Voltaren Dolo. Meanwhile, private labels continued to post double-digit growth.

China | Internet & mail order channel

- 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:



Chinese actor Jia Nailiang promoting By-Health's health supplement



OTCs promoted and sold via livestream



Health experts hold talks to promote health products

India | Topical analgesics

- Iodex** was extended in 2023 with a high-strength diclofenac presentation, Iodex UltraGel+, although majority of consumer promotion focuses on non-medicated presentations such as Rapid Action Spray, Pain Relief Balm and Muscle Care Cream



- TV ads focus on Muscle Care presentation, highlighting how it can give users “the strength to keep going” at work

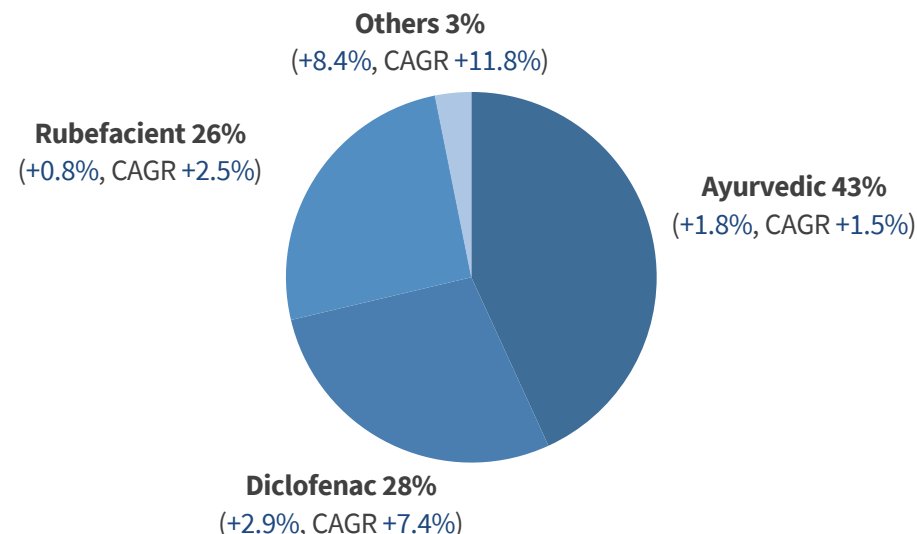
- Emami Mentho Plus Balm** is promoted as “the headache relief expert” and was extended in December 2024 with Mentho Plus Balm Total, which expanded the brand’s positioning outside headache to encompass all types of body pain and cold symptoms



- 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, \$mn)



Others comprises ketoprofen, nimesulide, among others