



Analgesics 2020

Assessing the Current & Future 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**
- Coverage of **14 major markets** from across the globe, with topline sales, brand performances, new developments, launches and promotional campaigns
- **Full-year 2019 sales** from the freshly-updated **DB6**, our dedicated CHC sales database
- Category sales **segmented by ingredient & format** in each country
- **Case studies** of key Analgesics brands, highlighting success factors, sales, NPD and A+P activity
- Developments in **scientific research** assessed, including a look at CBD's role in pain relief
- **Forecast sales** for all categories and countries to 2024 & 2029, plus predictions for the future, including a look to the likely **impact of Covid-19** on 2020 & 2021 sales

Key questions investigated in this report

How are Analgesics markets around the world performing?

Which marketers and brands stand out and what lessons can be learned?

Will the OTC launch of the first US topical NSAID be a game-changer?

How much can NPD benefit Analgesics in the years ahead?

Do the latest studies suggest potential new areas to explore?

How is the expanding market for CBD products affecting established analgesics?

Can momentum from the sales boost provided by the Covid-19 pandemic be maintained?

Where do the opportunities for future growth lie?



The Top 20 **Analgesics players**, including a mixture of MNCs and regional companies, generate over half of global sales and posted average growth of 4.4% in 2019, lagging behind the overall market. Yet this masks a diverse range of performances, from marketers experiencing flat or falling sales to those enjoying double-digit dynamism. Discover how individual players and their brands performed, both globally and in specific markets, and where the truly impressive growth is being generated.

14 individual markets covered



Australia



Brazil



Canada



China



France



Germany



India



Italy



Japan



Mexico



Poland



Russia



UK



USA

All the factors affecting the Analgesics market, from consumer trends and regulatory changes to A+P campaigns and new product launch activity, are highlighted.

The report features the latest 2019 sales data from our dedicated DB6 database, including topline historical sales by region, country and category, individual brand performances, short-term forecasts to year-end 2020 & 2021 and long-term forecasts to 2024 and 2029.

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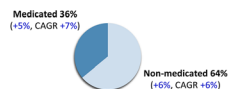
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Analgesics 2020

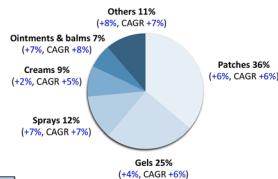
Executive Summary – Category review

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



- Majority of topical analgesics sales are non-medicated products; patches and gels generate over 60% of sales, with sprays and creams next most popular format

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



- Non-medicated patches form the single largest topical analgesics segment, generating \$1,625mn in 2019 (+5.8%, CAGR + 5.3%)
- Salonpas (majority of sales in Japan and USA) and TheraCare (most sales in W Europe and N America) are the leading multinational options, while a host of brands from China are well represented

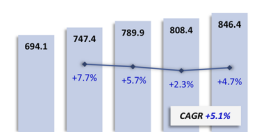
Global leading non-medicated patches 2019 (MSP, \$mn)

	Brand	2019	19/18	CAGR 19/15
1	Salonpas (Hisamitsu)	244.9	+3%	+7%
2	Cheezheng XiaoTongTie (Cheezheng Tibetan)	154.3	+17%	+8%
3	TheraCare (Angelini, Pfizer)	126.2	+4%	+2%
4	Yunnan Baiyao (Yunnan Baiyao)	113.4	+1%	+4%
5	Lingui Tongluo Qutong (Hanan Lingui)	80.8	+14%	+18%
	Others	905.5	+5%	+4%

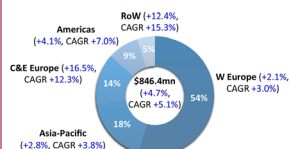
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Brand Case Studies – Voltaren

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



Voltaren analgesics sales by region 2019 (MSP, \$mn)



- Diclofenac-based Voltaren is global No.1 topical analgesic, established among consumers and HCPs as an effective OTC option for minor aches and pains
- Topical analgesics account for almost 90% of brand's sales; range includes gels, sprays, foams, medicated plasters and heat patches
- Systemic Voltaren (in tablets and liquid capsules) has rolled out OTC in selected markets, most successfully in India, Australia, Germany, Italy and Hungary; however, compulsorily withdrawn in UK because of regulatory concerns over cardio risks
- Brand performed solidly in five years to 2019, with topical versions (CAGR +5.3%) lagging slightly behind overall topicals market (CAGR +6.3%); systemic versions also trailed category growth (CAGR +3.1% vs +3.8%)
- GSK reported flat sales of Voltaren in Q1 2020, but stronger performance in Q2 thanks to launch of Voltaren OTC in USA (partly offset by brand's weaker showing in Europe)
- 2020 saw FDA approve Voltaren Arthritis Pain for OTC sale in the USA; it hit store shelves in May 2020; positioned as temporary relief of joint pain due to osteoarthritis, packaging boasts the claim "Original Prescription Strength" to leverage its Rx heritage and create an image of superior efficacy



Outlook & Prospects – Western Europe

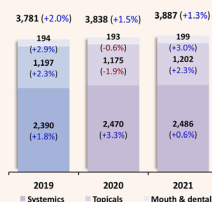
Western Europe analgesics short-term forecast sales 2020-21 (MSP, \$mn)

Category	2020	2020 / 2019	2021	2021 / 2020
France	866	-2%	853	-2%
Germany	621	+1%	638	+3%
UK	638	+9%	646	+1%
Italy	447	-5%	459	+3%
Spain	224	+0%	224	+0%
Rest of region	1,041	+4%	1,067	+2%
Total	3,838	+1%	3,887	+1%

Short-term forecast: Western Europe

- A downturn for France 2020-21 may be in part a result of paracetamol supply issues, as well as consumers continuing to favour prescription products over pure OTCs
- In Germany a spike in sales early in 2020 as a result of the pandemic is likely to be short-lived, with full-year sales projected to flatten; online channel will remain key for many consumers; similar trend in UK as demand slows after initial rush
- While Italy saw a short-term spike in analgesics sales, particularly for systemics, owing to the pandemic, it is likely to slow through 2020 as consumers restrict non-essential purchases

Western Europe analgesics short-term forecast sales by category 2020-21 (MSP, \$mn)



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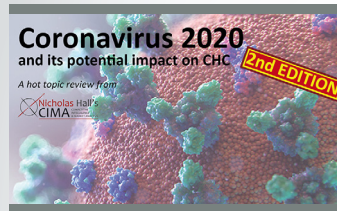
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Latest Nicholas Hall Reports:



Cough, Cold & Allergy

Coming soon, this report will examine the CCA market across 10 leading geographies, covering consumer trends, regulatory changes, A+P campaigns and launch activity, with long- and short-term forecasts. The report will include the latest mid-year 2020 data from **DB6** and brand case studies.



Coronavirus 2020

This special Hot Topic review from Nicholas Hall's CIMA (Competitive Intelligence & Market Analysis) division explores the Coronavirus pandemic of 2020 and its impact on CHC.

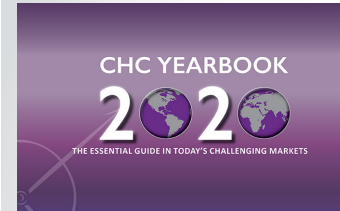
June 2020



Cosmeceuticals

This report explores the space where Cosmetics meet Pharmaceuticals, scoping products which offer both aesthetic and therapeutic benefits across 10 leading markets. Highlighting emerging segments including personalisation, diagnostic apps, probiotics for skin care and CBD-infused cosmeceuticals.

June 2020



CHC Yearbook 2020

CHC YearBook 2020 gives you the most up-to-date and fully-informed picture of the CHC industry around the world, featuring expert analysis and incorporating full year-end 2019 data from the only dedicated worldwide CHC database.

April 2020



Innovation in CHC

A report on 100 key CHC innovations in 2019 and some of the most prominent delivery format and ingredient trends in the industry. It examines new product activity and explores what the future might hold in terms of CHC innovation.

April 2020



CBD 2020

This feature report dives into the issues surrounding when and how players should respond to the enormous commercial potential of CBD, across diverse healthcare and retail categories.

March 2020



Digital Marketing & e-Commerce

Digital Marketing is now considered by many Consumer Healthcare players to be the most important way to engage with consumers and healthcare professionals.

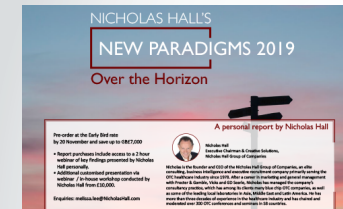
November 2019



VMS

Access key insights and essential knowledge of strategies, launches, emerging segments and new opportunities in the VMS market with this essential title.

September 2019



New Paradigms 2019

Focusing on major issues surrounding the CHC Market, including Innovation, Distribution, Digital Engagement, Competition and much more, this is an essential read for all players striving to compete in this evolving marketplace.

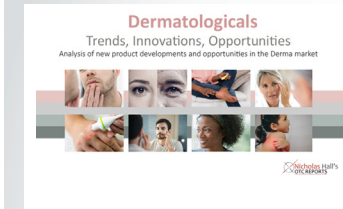
August 2019



Lower GI

An in-depth exploration of the Lower GI market, including Laxatives, Antidiarrhoeals, Antispasmodics & IBS remedies and Probiotics. Landscaping major markets, with topline sales, brand performances, launches and ad campaigns.

March 2019



Dermatologicals

Access key insights and essential knowledge of the most important launches and emerging segments in the Dermatologicals market. Categories covered include Acne, Anti-ageing, Antifungals, Cold sore treatments, Cosmeceuticals, FIC and more.

December 2018



Sleep

This report investigates the competitive landscape in 12 key markets, establishing trends & developments, barriers to growth and emerging niches. Charts segment the market by ingredient and show proportion of sales generated by herbals & naturals.

October 2018

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