

Executive Summary

- An ageing population and strong branding helped drive strong year-on-year growth in the **UK**, where topical analgesics primarily comprise brands for treating joint and muscle pain; a small niche of products position for migraine / headache relief
- Patch formats are increasingly popular, with brands that traditionally offered creams / gels extended with patches / plasters
- **Brazil's** topical analgesics market posted only modest growth in 2017; rubefaciants take the largest share, with diclofenac the largest medicated segment
- Warming and cooling products, particularly cooling sprays, are especially popular

Medicated self-care topical analgesics

NSAIDs

Majority of medicated topical analgesics are formulated with NSAIDs to ease inflammation and swelling

NSAIDs inhibit COX enzymes which produce prostaglandins, causing pain and inflammation

However, COX-1 also contributes to protecting the stomach and intestinal lining. Inhibition (chronic use) can cause GI ulcers and bleeding

Elsewhere, inhibition of COX-2 was found to increase the risk of heart disease in chronic users

Topical NSAIDs are considered to be safer than systemic options as the drug is delivered locally, minimising its spread throughout the body

COX - 1

Indomethacin
Ketoprofen
Flurbiprofen

Piroxicam
Naproxen

Ibuprofen
Diclofenac

Meloxicam

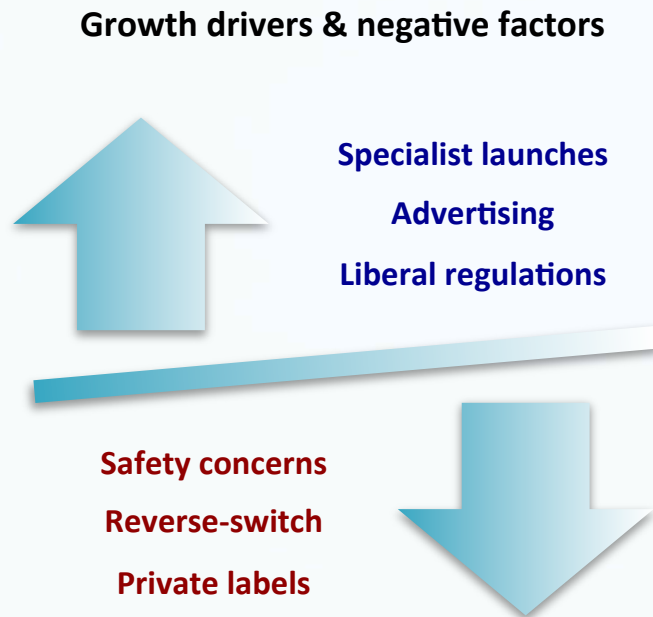
Nimesulide

Celecoxib

COX - 2

Drug inhibition preference

Australia – Overview

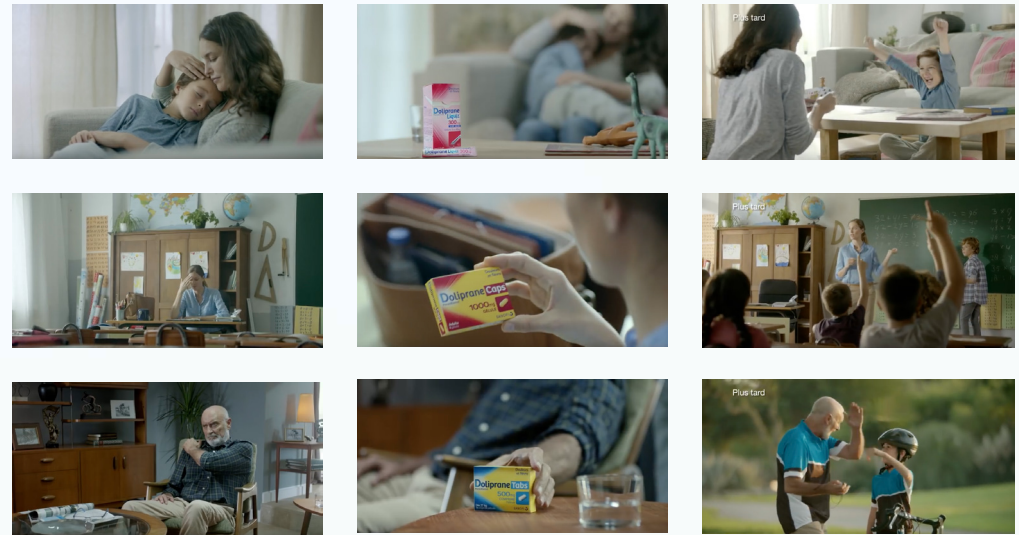


Australia leading analgesics marketers mid-2017 (MSP, \$mn)					
	Marketer	mid-2017 \$mn	mid-17 / mid-16	CAGR 16/12	% share
1	GlaxoSmithKline	155.4	-5%	+1%	45
2	RB	67.9	-4%	+2%	20
3	Sanofi	23.6	-16%	-4%	7
4	Pfizer	13.0	+7%	+8%	4
5	Bayer	8.7	-2%	-3%	3
6	Arrow	8.0	-3%	n/a	2
7	Perrigo	5.5	-10%	+0%	2
8	Pharmacor	4.9	+7%	n/a	1
9	Rohto	4.6	+3%	+5%	1
10	Painaway	3.0	-1%	+4%	1
	Others	47.1	-4%	+0%	14

- Regulatory environment for analgesics is otherwise relatively liberal; although mass market naproxen was denied approval in 2016, ingredient was granted Appendix H status in June, permitting consumer advertising
- Paracetamol and ibuprofen combinations such as Nuromol (RB) and Maxigesic (AFT Pharmaceutical) were granted S2 (pharmacy-only) status in June 2016 when labelled with a recommended daily dose of ibuprofen 1,200mg or less in packs of no more than 12 doses
- Among **topical analgesics**, non-medicated options and products for sports injuries are significant segments; marketers such as Mentholatum have extended their product lines with massage rubs and sprays

France – Systemic analgesics

- TV ads for the Doliprane range carried the tagline “An ally against pain”
- The tagline appeared in a website (contreladouleur.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
- Upsa / 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 Upsa / BMS renaming reimbursed options EfferalganMed, while pure OTC versions EfferalganTab (1,000mg tabs) and EfferalganOdis (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



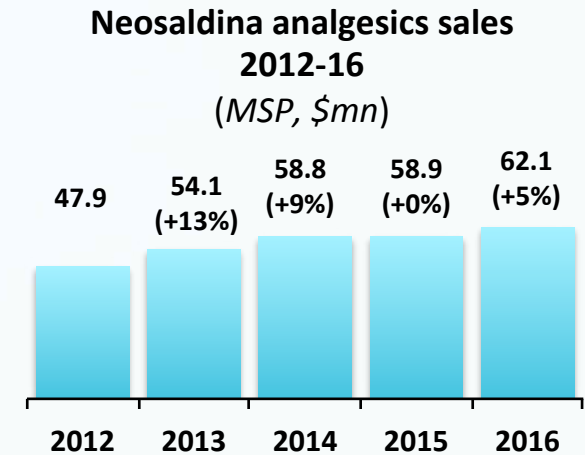
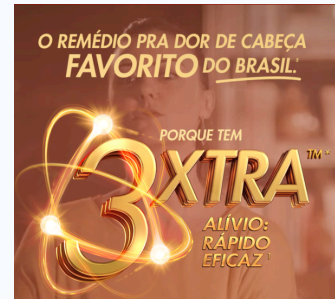
TV ads showed different Doliprane presentations able to treat a range of body pains



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 similars as well as dynamic launch Doril Enxaqueca (Cosmed / Hypermarcas)
- Brand uses proprietary “3XTRA” 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 leading analgesics markets mid-2017 [†] (MSP, \$mn)				
Country	mid-2017 \$mn	mid-17 / mid-16	CAGR 16/12	% share
Brazil	69.3	+9%	+7%	100

[†] includes 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.