

# Sleep

## Exploring Opportunities for Growth in Sleep Aids & Sedatives

**(196 pages)**

Definitions & methodology

### **Executive Summary** (17 pages)

Global sleep trends & developments

*Global sedatives & sleep aids sales 2013-17*

Anti-snoring segment sees plenty of activity

*Global sedatives & sleep aids sales by region 2017*

*Top 12 sedatives & sleep aids markets 2017*

*Global leading sedatives & sleep aids marketers 2017*

*Global leading sedatives & sleep aids 2017*

Sleep aids market spans registered OTCs and supplements

Melatonin's classification varies widely across markets

*Ingredients presence across main markets*

Innovation highlights

Connected Health

Opportunity for Rx-to-OTC switch of prescription sleep aids down the line?

Remote at best

Global trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Cough & cold

Systemic analgesics

Menopause

Cannabidiols for sleep - high potential for future development?

Solid growth forecast, although several obstacles in way

*Global sedatives & sleep aids forecast sales 2022-27*

### **Country profiles**

#### **Brazil** (12 pages)

##### Overview (5pp)

*Brazil sedatives & sleep aids sales 2013-17*

Sleep trends & developments in Brazil

*Brazil leading sedatives & sleep aids marketers 2017*

Regulations

Pending updates for regulations regarding OTCs and food supplements, set to come into effect in 2018

*Notable innovations in Brazil's sleep market*

##### Sedatives & sleep aids (4pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in Brazil*

*Brazil leading sedatives & sleep aids 2017*

*Brazil sedatives & sleep aids sales by ingredient segment 2017*

##### Other products for sleep (2pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Systemic cold & flu

Topical decongestants

Outlook (1pp)

Highlighting points-of-difference will be key to growth  
*Brazil sedatives & sleep aids forecast sales 2022-27*

**Canada (12 pages)**

Overview (5pp)

*Canada sedatives & sleep aids sales 2013-17*

Sleep trends & developments in Canada

*Canada leading sedatives & sleep aids marketers 2017*

Regulations

*Notable innovations in Canada's sleep market*

Sedatives & sleep aids (4pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in Canada*

*Canada leading sedatives & sleep aids 2017*

*Canada sedatives & sleep aids sales by ingredient segment 2017*

Unisom extended with snoring relief spray

Other products for sleep (2pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Night-time analgesics

Others (including cold & flu, joint health supplements, dermatologicals, medical cannabis)

Outlook (1pp)

Strong growth with many possibilities for innovation  
*Canada sedatives & sleep aids forecast sales 2022-27*

**China (12 pages)**

Overview (5pp)

*China sedatives & sleep aids sales 2013-17*

Sleep trends & developments in China

*China leading sedatives & sleep aids marketers 2017*

2017 TCM law may boost traditional medicine

China's two-invoice system to be implemented nationwide by 2018

Career demands and academic pressure driving sleeplessness

Regulations

Sedatives & sleep aids (4pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in China*

*China leading sedatives & sleep aids 2017*

*China sedatives & sleep aids sales by ingredient segment 2017*

Other products for sleep (2pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Menopause

Tonics & cure alls

*TCM principles behind causes of insomnia*

Laxatives

Outlook (1pp)

Digital innovations that reach out to young adults essential  
*China sedatives & sleep aids forecast sales 2022-27*

**France (13 pages)**

Overview (4pp)

*France sedatives & sleep aids sales 2013-17*

Sleep trends & developments in France

*France leading sedatives & sleep aids marketers 2017*

Regulations

*Notable innovations in France's sleep market*

Sedatives & sleep aids (7pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in France*

*France leading sedatives & sleep aids 2017*

*France sedatives & sleep aids sales by ingredient segment 2017*

Health authorities urge caution over melatonin use

Other products for sleep (1pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Magnesium

Cough & cold

Outlook (1pp)

Strong growth potential for sleep aids

*France sedatives & sleep aids forecast sales 2022-27*

**Germany (11 pages)**

Overview (4pp)

*Germany sedatives & sleep aids sales 2013-17*

Sleep trends & developments in Germany

*Germany leading sedatives & sleep aids marketers 2017*

Regulations

*Notable innovations in Germany's sleep market*

Sedatives & sleep aids (4pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in Germany*

*Germany leading sedatives & sleep aids 2017*

*Germany sedatives & sleep aids sales by ingredient segment 2017*

Drink brands offer alternative to tablet formats

Other products for sleep (2pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Outlook (1pp)

Opportunities for expansion limited

*Germany sedatives & sleep aids forecast sales 2022-27*

**Italy (9 pages)**

Overview (3pp)

*Italy sedatives & sleep aids sales 2013-17*

*Sleep trends & developments in Italy*

*Italy leading sedatives & sleep aids marketers 2017*

*Regulations*

Sedatives & sleep aids (3pp)

*Trends & developments in sedatives & sleep aids*

*Popularity of ingredients in Italy*

*Italy leading sedatives & sleep aids 2017*

*Italy sedatives & sleep aids sales by ingredient segment 2017*

Other products for sleep (2pp)

*Trends & developments in sleep-focused products*

*Top categories with sleep-focused SKUs*

*Menopause supplements*

*Others (including joint health supplements, topical decongestants)*

Outlook (1pp)

*Category overcrowding limits potential for growth*

*Italy sedatives & sleep aids forecast sales 2022-27*

**Japan (10 pages)**

Overview (4pp)

*Japan sedatives & sleep aids sales 2013-17*

*Sleep trends & developments in Japan*

*Japan leading sedatives & sleep aids marketers 2017*

*Regulations*

*Drug definitions*

Sedatives & sleep aids (4pp)

*Trends & developments in sedatives & sleep aids*

*Popularity of ingredients in Japan*

*Japan leading sedatives & sleep aids 2017*

*Japan sedatives & sleep aids sales by ingredient segment 2017*

*Increasing marketer interest in health foods and supplements for sleep*

Other products for sleep (1pp)

*Trends & developments in sleep-focused products*

*Products for stress and sleep*

Outlook (1pp)

*Social factors will drive demand*

*Japan sedatives & sleep aids forecast sales 2022-27*

**Poland (9 pages)**

Overview (3pp)

*Poland sedatives & sleep aids sales 2013-17*

*Sleep trends & developments in Poland*

*Poland leading sedatives & sleep aids marketers 2017*

*Regulations*

Sedatives & sleep aids (3pp)

*Trends & developments in sedatives & sleep aids*

*Popularity of ingredients in Poland*

*Poland leading sedatives & sleep aids 2017*  
*Poland sedatives & sleep aids sales by ingredient segment 2017*

*Other products for sleep (2pp)*

Trends & developments in sleep-focused products  
Magnesium supplementation for stress and fatigue well-developed in Poland  
*Poland leading magnesium supplements 2017*

*Outlook (1pp)*

Lack of genuine innovation may limit growth  
*Poland sedatives & sleep aids forecast sales 2022-27*

**Russia (12 pages)**

*Overview (4pp)*

*Russia sedatives & sleep aids sales 2013-17*  
Sleep trends & developments in Russia  
*Russia leading sedatives & sleep aids marketers 2017*  
Regulations  
*Notable innovations in Russia's sleep market*

*Sedatives & sleep aids (5pp)*

Trends & developments in sedatives & sleep aids  
*Popularity of ingredients in Russia*  
*Russia leading sedatives & sleep aids 2017*  
*Russia sedatives & sleep aids sales by ingredient segment 2017*  
Government limits pack sizes of alcohol-based medicine, "strong psychotropic effects" criticised

*Other products for sleep (2pp)*

Trends & developments in sleep-focused products  
*Top categories with sleep-focused SKUs*  
Menopause  
Minerals  
Chest rub & inhalants  
Memory & brain health

*Outlook (1pp)*

Little growth in face of psychotropic clampdown and UTC sales  
*Russia sedatives & sleep aids forecast sales 2022-27*

**Spain (11 pages)**

*Overview (4pp)*

*Spain sedatives & sleep aids sales 2013-17*  
Sleep trends & developments in Spain  
*Spain leading sedatives & sleep aids marketers 2017*  
Regulations  
*Notable innovations in Spain's sleep market*

*Sedatives & sleep aids (4pp)*

Trends & developments in sedatives & sleep aids  
*Popularity of ingredients in Spain*  
*Spain leading sedatives & sleep aids 2017*  
*Spain sedatives & sleep aids sales by ingredient segment 2017*

*Other products for sleep (2pp)*

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Systemic analgesics

Cough & sore throat

Menopause

Outlook (1pp)

Solid growth forecast, with herbals & naturals to lead way

*Spain sedatives & sleep aids forecast sales 2022-27*

**UK (12 pages)**

Overview (4pp)

*UK sedatives & sleep aids sales 2013-17*

Sleep trends & developments in UK

*UK leading sedatives & sleep aids marketers 2017*

Regulations

*Notable innovations in UK's sleep market*

Sedatives & sleep aids (5pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in UK*

*UK leading sedatives & sleep aids 2017*

*UK sedatives & sleep aids sales by ingredient segment 2017*

Withings Sleep Tracking Mat: a device to analyse sleep quality, and improve it

Doppel: a wristband for sedation and stimulation

Other products for sleep (2pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Cough & cold

Others

Outlook (1pp)

Low levels of innovation set to hold category back

*UK sedatives & sleep aids forecast sales 2022-27*

**USA (17 pages)**

Overview (4pp)

*USA sedatives & sleep aids sales 2013-17*

Sleep trends & developments in USA

*USA leading sedatives & sleep aids marketers 2017*

Regulations

*Notable innovations in USA's sleep market*

Sedatives & sleep aids (7pp)

Trends & developments in sedatives & sleep aids

*Popularity of ingredients in USA*

*USA leading sedatives & sleep aids 2017*

*USA sedatives & sleep aids sales by ingredient segment 2017*

New sleep-focused medical devices entering market

Other products for sleep (5pp)

Trends & developments in sleep-focused products

*Top categories with sleep-focused SKUs*

Analgesics

*USA leading PM analgesic presentations 2017*

*Cough & Cold*

*VMS*

*Others (medical cannabis, antacids)*

*Outlook (1pp)*

*Growth set to accelerate in future*

*USA sedatives & sleep aids forecast sales 2022-27*

### **Connected Health (6 pages)**

Digital health initiatives offer long-term therapies that aim to treat insomnia, not just symptoms

*Cognitive Behavioural Therapy for Insomnia (CBT-I)*

*Apps to aid sleep*

*Digital Devices Promoting Sleep*

*Fitness wearables, where better sleep is an added benefit*

*Bridging the gap: brands utilising apps*

### **Brand Case Studies & Innovations (11 pages)**

*Nytol (2pp)*

*Diphenhydramine brand expanding into new niches*

*Nytol sales 2013-17*

*Success factors*

*Valdispert (2pp)*

*Natural sleep aid present across Europe*

*Valdispert sales 2013-17*

*Success factors*

*ZzzQuil (2pp)*

*US diphenhydramine leader expanded into H&N*

*ZzzQuil sales 2013-17*

*Success factors*

*Notable innovations in herbals and naturals*

*Notable format innovations*

*Notable innovations in spray formats*

*Notable innovations in food and drink formats*

*Notable innovations in anti-snoring products*

### **Outlook (10 pages)**

Mixed outlook for global sleep market

*Global sedatives & sleep aids forecast sales 2022-27*

*Global forecast sedatives & sleep aids sales by region 2022-27*

*Opportunity for Rx-to-OTC switch of prescription sleep aids down the line?*

*Remote at best*

*Outlook across key markets*

*Asia-Pacific sedatives & sleep aids sales 2022-27*

*North America sedatives & sleep aids sales 2022-27*

*Western Europe sedatives & sleep aids sales 2022-27*

*C&E Europe sedatives & sleep aids sales 2022-27*

*Latin America sedatives & sleep aids sales 2022-27*