

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

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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)

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Sleep trends & developments in France

France leading sedatives & sleep aids marketers 2017

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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

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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
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Spain leading sedatives & sleep aids marketers 2017
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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