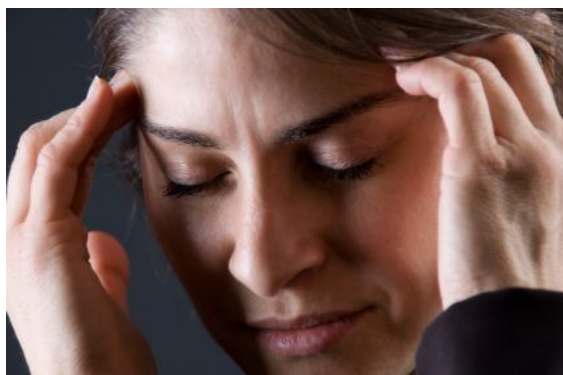


Analgesics - UK - May 2010

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What is this report about?

The analgesics market is mature and enjoys regular usage among a broad range of adults. The drug companies have continued to compete against the growing pressure from cheaper own-label equivalents by developing new variants such as faster-acting and stronger products. But how much more scope is there to enhance the formulations and will consumers be persuaded to pay higher prices when the own-label alternatives are so much cheaper?

The report shows which consumers are tempted to save and go for the cheapest and which are persuaded to spend more for premium options.

What have we found out?

- Growth in consumer expenditure on over-the-counter (OTC) analgesics has slowed in the last two years. Recession is not the sole explanation. The proportion of adults using analgesics has declined and cheaper own-label products have put price pressure on branded products.
- Positive news for analgesics is that they remain an essential store cupboard item – 83% of adults who use painkillers always keep a supply at home. So demand is unlikely to change significantly, even in a recession.
- Although demand has not changed dramatically, explosive growth in sales of own-label products has taken place, creating stiff competition for the leading brands. In the recession, some consumers appear to have re-evaluated their spending priorities becoming thriftier and trading down to basic alternatives.
- Leading brands continue to differentiate themselves from own-label by developing added-value products which command premium prices. Supported by high profile advertising campaigns, leading brands are differentiated by faster-acting, more powerful, or more symptom-specific formulations.
- Self-medicating is commonplace among adults. Eight out of ten people say they have to feel really ill before going to the doctor. But an element of caution remains: over half usually wait for the pain to go away on its own, without taking medication.
- Even though the vast majority of people have some painkillers close at hand, only 16% see them as the only treatment for pain. And only 13% reach for the painkillers at the first sign of pain. The market for painkillers could grow further if more people were to trust the safety and efficacy of painkillers and take them at an earlier stage when pain strikes.

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