

Analgesics - UK - July 2013

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'Low price remains an important purchase influencer, as pain sufferers struggle to see the difference between own-label and branded products. Many branded launches in early 2013 focused on topical analgesic; which brands may be able to use as a point of differentiation.'

– Roshida Khanom, OTC and Personal Care Analyst

In this report we answer the key questions:

- How are brands remaining competitive against own-label?
- What impact will population changes have on this market?
- What launches have characterised development in 2012 and 2013 so far?
- Where are people buying OTC analgesics?

The analgesics market (made up of oral, topical and paediatric analgesics) has remained fairly constant since 2008, and is predicted to see slow and steady growth to 2018. Strong competition from own-label products, the impact of consumer resistance to taking OTC analgesics as well as greater awareness of the similarities between own-label and branded products, is hindering growth in the category. Additionally, despite being a category that is emotional as much as it is functional, brand communication and claims remain heavily functional. The first six months of 2013 has seen a number of topical analgesics launched, which may help brands to increase differentiation compared to own-label products. The rise in the youngest demographics (under 14s) is likely to positively impact this market both from a children's and adult's analgesics points of view.

This report covers only over-the-counter (OTC), non-prescription medication, defined by the Proprietary Association of Great Britain.

This report examines the UK consumer market for OTC analgesics (also referred to as OTC painkillers and OTC pain remedies). The OTC analgesics market is defined as including all analgesics available over the counter without a prescription. This includes topical analgesics (pain relief gels, creams and sprays), alongside oral analgesics, oral lesions and toothache remedies.

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