

# Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The analgesics market has experienced modest growth in recent years. The majority of consumers turn to some form of OTC (over-the-counter) analgesic to treat pain, with internal analgesics remaining the dominate choice for pain relief, though external analgesics continue to experience faster growth. Interest is growing for natural ingredients and easy-to-use formats."

- Marissa Gilbert, Health and Wellness Analyst

This report looks at the following areas:

Feminine pain reliever sales descend further  
Internal analgesic purchases are automatic; consumers are not seeking advice  
Perceptions of external analgesics are soft

For the purposes of this Report, Mintel has segmented the analgesics market as follows:

OTC internal analgesics

- Acetaminophen, aspirin, ibuprofen, naproxen sodium, magnesium salicylate

OTC external analgesics

- Rubs – such as topical creams/sprays and patches/wraps – with heating/cooling properties

Excluded from this Report are:

- Antihistamines, decongestants, sinus, cough, cold, and flu remedies

In addition, this Report focuses on the analgesics products marketed for pain relief that are available over the counter/without a prescription. Other products that provide pain relief but are not included in the market size of this Report, but may be mentioned in the Report, are muscle/body support devices and electrotherapy devices.

**BUY THIS REPORT NOW**

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

## DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Feminine pain reliever sales descend further

Figure 1: Percent change in MULO sales of internal analgesics, by subsegments, rolling 52-weeks 2015 and 2016

Internal analgesic purchases are automatic; consumers are not seeking advice

Figure 2: Purchase factors when choosing an internal pain reliever, March 2016

Perceptions of external analgesics are soft

Figure 3: External analgesic format perceptions, March 2016

The opportunities

Opportunity to expand usage among older adults

Figure 4: Heating/cooling wraps or patches use, by age, March 2016

Increase first-use of external analgesics in treatment steps

Figure 5: Used first in pain relieving treatment plan, March 2016

Stress-reducing pain relievers could offer relaxation and relief

Figure 6: Sources of pain, March 2016

What it means

### The Market – What You Need to Know

The analgesics market experiences modest growth

Internal analgesics dominate the market; yet external growing quicker

Alternative pain relieving options likely impact OTC analgesics sales

Stress and age factor into the need for pain relief

### Market Size and Forecast

Modest market growth continues

Figure 7: Total US sales and fan chart forecast of OTC analgesics, at current prices, 2011-21

Figure 8: Total US sales and forecast of OTC analgesics, at current prices, 2011-21

### Market Breakdown

Internal analgesics lead the market; yet external growing more rapidly

Figure 9: Market share of OTC analgesics sales, by segment, 2014 and 2016

Figure 10: Percent change in OTC analgesics sales, by segment, at current prices, 2012-16

Other retail channels remain the go-to for analgesics

Figure 11: Total US retail sales of analgesics, by channel, at current prices, 2014 and 2016

### Market Perspective

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Muscle/body devices protect against pain

Figure 12: MULO sales of muscle/body support devices, by leading companies and brands, rolling 52-weeks 2015 and 2016

TENS devices can offer at-home relief

Figure 13: MULO sales of electrotherapy devices, by leading companies and brands, rolling 52-weeks 2015 and 2016

## Market Factors

Chronic stress can lead to pain

Age factors in how pain is treated; shifting dynamics have market impact

Figure 14: US population aged 18 or older, by age, 2011-21

## Key Players – What You Need to Know

High selling internal analgesic brands sustain the analgesics market

Diversified external analgesics segment and iconic internal brands succeeding

Sales decline for niche pain category; overmedicating on alert

External patches, wearable devices, and retro brands are on the horizon

## Manufacturer Sales of Analgesics

Top companies in the market driven by internal analgesic sales

Figure 15: Manufacturer sales of analgesics, 2015 and 2016

## What's Working?

Several players in the external segment lifting sales in the overall market

Figure 16: MULO sales of external analgesics by leading companies and brands, rolling 52-weeks 2015 and 2016

J&J sales boost a slow growing internal segment

Figure 17: MULO sales of internal analgesics, by leading companies and brands, rolling 52-weeks 2015 and 2016

## What's Struggling?

Sales of feminine internal pain relievers continue downward

Figure 18: MULO sales of feminine pain relievers, by select companies and brands, rolling 52-weeks 2015 and 2016

Overmedicating for pain relief is under scrutiny

## What's Next?

BLUE-EMU launches first lidocaine patch

Traditionally internal medication administered via a skin patch

More wearable TENS devices available to consumers; Quell wins award

What's old could be new again

## The Consumer – What You Need to Know

Pain is common, so is use of pain relieving medications

A medication is consumers' first treatment choice to relieve pain

The causes of pain are diverse; stress leads the way

Consumers purchase OTC internal remedies based on experience

OTC external analgesics elicit stronger purchasing requirements

Internal analgesics garner stronger perceptions than external

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Single dosages, guidance, natural and migraine patches appeal to some consumers

## Pain Reliever Use

Experiencing some pain and using a treatment is almost certain

Figure 19: Pain reliever use, March 2016

**Internal analgesics used most; type used varies by gender and age**

Figure 20: Internal pain reliever use, by gender and age, March 2016

More than one third of adults use an external remedy

Figure 21: External pain reliever use, by age, March 2016

Figure 22: Cross of external pain reliever use by internal remedies, March 2016

White and Hispanic adults most likely to use an analgesic

Figure 23: Pain reliever use, by race and Hispanic origin, March 2016

## Treatment Plan for Pain Relief

When pain strikes, consumers turn to medications for relief

Figure 24: Treatment plan for pain relief, March 2016

Consumers specifically treat with an OTC internal analgesic first

Figure 25: Use first in pain relieving treatment plan, March 2016

Figure 26: Use of an internal OTC first in pain relieving treatment plan, by age, race, and Hispanic origin, March 2016

Resting is also a key to treatment; particularly among young adults

Figure 27: Use rest in pain relieving treatment plan, by 1st, 2nd, 3rd and any 1st/2nd/3rd by gender and age, March 2016

Asian adults turning to nonmedical treatments first; Black adults resting

Figure 28: Use first in pain relieving treatment plan, by race and Hispanic origin, March 2016

## Sources of Pain

Stress is considered the leading source of pain

Figure 29: Sources of pain, March 2016

Older adults more likely to associate age as the source of body pain

Figure 30: Age as source of pain, by age, March 2016

Health ailments are also a driving force for pain

Figure 31: Medical issues as source of pain, by age, March 2016

Perceptions of pain caused by physical activity varies by race and ethnicity

Figure 32: Activity as source of pain, by race and Hispanic origin, March 2016

## Choosing an Internal OTC Pain Reliever

Internal pain relievers are dependable choice

Figure 33: Purchase factors when choosing an internal pain reliever, March 2016

Price and brand are more important to men

Figure 34: Select purchase factors when choosing an internal pain reliever, by gender, March 2016

White adults trust what has worked; while Black adults seek fast acting

Figure 35: Select purchase factors when choosing an internal pain reliever, by race and Hispanic origin, March 2016

## Choosing an External OTC Pain Reliever

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

**External OTC pain reliever users have stronger purchasing requirements**

Figure 36: Purchase factors when choosing an external pain reliever, March 2016

**Consumers seek out information about external analgesics**

Figure 37: Impact of a recommendation, product reviews, and commercial when choosing an external pain reliever, by gender and age, race and Hispanic origin, and generation, March 2016

## Format Perceptions

**Perceptions of internal analgesics more positive than external**

Figure 38: Format perceptions, March 2016

**Consumers' familiarity with tablets drives up perceptions**

Figure 39: Internal analgesic format perceptions, March 2016

**External formats garner soft perceptions; barriers to use stand out**

Figure 40: External analgesic format perceptions, March 2016

## Interest in Innovations

**More than one third of adults are interested in single-dose medications**

Figure 41: Interest in single-dose medications, by age, March 2016

**Some adults would like more guidance in finding pain relief**

Figure 42: Interest in advice and technology innovations, by age, March 2016

**Natural remedies have noteworthy appeal**

Figure 43: Interest in natural ingredients, Arnica, and aromatherapy/essential oils, by age, March 2016

**Migraine/headache patch to relieve pain appeals to young women**

Figure 44: Interest in external patch for migraine/headaches, by gender and age, March 2016

Figure 45: Experience migraine headaches, by gender, Fall 2015 NHCS Adult Study 12-month

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

## Appendix – Market

Figure 46: Total US sales and forecast of OTC analgesics, at inflation-adjusted prices, 2011-21

Figure 47: Total US retail sales of analgesics, by channel, at current prices, 2011-16

Figure 48: Total US retail sales and forecast of analgesics, by segment, at current prices, 2011-21

Figure 49: Total US retail sales of analgesics, by segment, at current prices, 2014 and 2016

Figure 50: MULO sales of muscle/body support devices, by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 51: MULO sales of electrotherapy devices, by leading companies and brands, rolling 52-weeks 2015 and 2016

## Appendix – Key Players

Figure 52: MULO sales of internal analgesics, by leading companies and brands, rolling 52-weeks 2015 and 2016

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Analgesics - US - June 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 53: MULO sales of external analgesics by leading companies and brands, rolling 52-weeks 2015 and 2016

Figure 54: Percentage of adults agreeing with statement – Any agree (net)\*, 2011-15

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)