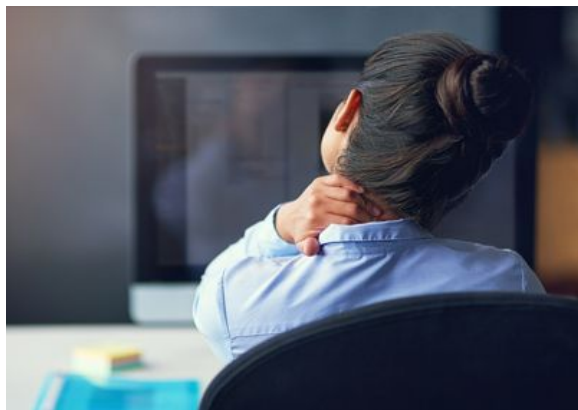


## OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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



"A majority of consumers turn to some form of OTC (over-the-counter) pain management product to treat pain, with OTC internal analgesics remaining the dominate choice for pain relief, though external analgesics continue to experience faster growth."

**- Marissa Gilbert, Associate Director - Health & Wellness**

This report looks at the following areas:

- As familiarity with a remedy increases, so does store brand acceptance
- Size of external user base not growing
- Young adults willing to try alternatives to traditional pain relievers

Looking forward, consumers' need for pain treatments is not expected to change, and a preference for familiar brands will remain; however, store brand remedies are considered an acceptable choice in many cases and will challenge market growth.

**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

# OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Market overview

OTC pain management market relies on high pain incidence

Figure 1: Total US retail sales and forecast of OTC pain medication and devices, at current prices, 2013-23

The market is sustained by internal remedies; external remedies offer growth

Figure 2: Total US retail sales and forecast of OTC pain medication and devices, by segment, at current prices, 2013-23

The issues

As familiarity with a remedy increases, so does store brand acceptance

Figure 3: Attitudes toward store brand remedies, by pain reliever used to treat any pain location, April 2018

Size of external user base not growing

Figure 4: Pain treatment – Any type of pain (net), April 2017 and April 2018

Young adults willing to try alternatives to traditional pain relievers

Figure 5: Select pain treatment – Any type of pain (net), by age, April 2018

The opportunities

Pain isn't isolated to one part of the body

Figure 6: Repertoire of any pain experience, April 2018

Changing US demographics could impact market

Figure 7: Select pain treatment – Any type of pain (net), by Hispanic origin, April 2018

Safety concerns drive external use

Figure 8: Agree OTC external pain relievers are safer than internal remedies, by pain reliever used to treat any pain location, April 2018

What it means

### The Market – What You Need to Know

OTC pain management market and pain incidence are steady

Internals hold steady, externals give a lift, support devices dip

OTC TENS devices offer alternative to manage pain, but sales slowing

Pain impacts quality of life

Increasing healthcare costs solidifies OTC necessity

Dependency concerns exist

Opioid crisis calls attention to the need for improved pain management

### Market Size and Forecast

OTC pain management market relies on unwavering pain incidence

Figure 9: Total US retail sales and forecast of OTC pain medication and devices, at current prices, 2013-23

Figure 10: Total US retail sales and forecast of OTC pain medication and devices, at current prices, 2013-23

**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)

# OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

## Market Breakdown

The market is upheld by internals; externals continue to shine

Figure 11: Total US retail sales and forecast of OTC pain medication and devices, by segment, at current prices, 2013-23

Figure 12: Total US retail sales of OTC pain medication and devices, by segment, at current prices, 2016 and 2018

## Market Perspective

Spotlight on OTC TENS devices

Early fervor waning

Figure 13: Multi-outlet sales of electrotherapy devices, by leading companies and brands, rolling 52 weeks 2017 and 2018

Grow user base by targeting pain location

## Market Factors

Pain impacts quality of life

Figure 14: Agree pain negatively impacts my daily activities, by race and Hispanic origin, April 2018

Healthcare costs climb; consumers respond by treating with OTCs

Figure 15: Familiarity with treating body pain, March 2018

Dependency concerns are present

Figure 16: Agree concerned about dependency on pain relievers, by repertoire of pain experience, April 2018

Spotlight on the opioid crisis: better practices for pain management

## Key Players – What You Need to Know

Johnson & Johnson is the leader in OTC pain relief

Natural pain relief a must for some; free-from provides a natural halo

Sales stall as consumers seek lower cost, reusable, or DIY relief

Internal feminine pain relievers struggle; new approaches emerging

Preventing pain and aromatherapy upcoming for relief

Drug store retailers are on the front line

Familiarity and trust vital for pain remedy loyalty

## Company and Brand Sales of OTC Pain Medication and Devices

Johnson & Johnson increases lead in the market

Figure 17: Multi-outlet sales of OTC pain medication and devices, by leading companies, rolling 52 weeks 2017 and 2018

## What's Working?

Tylenol continues to dominate

Figure 18: Multi-outlet sales of internal analgesics, by leading brands, rolling 52 weeks 2017 and 2018

Figure 19: Multi-outlet sales of Tylenol and Children's Tylenol, rolling 52 weeks 2017 and 2018

Natural pain relief a must for some consumers

Figure 20: Prefer to manage pain with natural remedies, by pain treatment, April 2018

Figure 21: Share of pain reliever product launches, by natural and free-from claims, 2013-17

Hero ingredients continue to drive external analgesic sales

Figure 22: Multi-outlet sales of select external analgesics, by companies and brands, rolling 52 weeks 2017 and 2018

**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)

## OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

### What's Struggling?

Muscle/body support devices lack novelty

Figure 23: Multi-outlet sales of muscle/body support devices, by leading companies and brands, rolling 52 weeks 2017 and 2018

Heat/ice pack sales dragging

Figure 24: Multi-outlet sales of external analgesic rubs and heat/ice packs, 2013-17

Feminine pain reliever sales falling; competitors taking new angles

Figure 25: Multi-outlet sales of feminine pain relievers, 2013-17

### What's Next?

Preventing migraines before they start

Figure 26: Any pain and head pain experience, by age, April 2018

Aromatherapy offers supplementary pain relief

Drug store retailers are at the front line for pain relief outreach

### Select Brand Perceptions

Brand perceptions show a relationship to product sales

Familiarity with internal remedies ties with ease of finding in store

Figure 27: Correspondence analysis – Brand perceptions, by brand awareness, April 2018

Correspondence analysis methodology

Figure 28: Brand perceptions, by brand awareness, April 2018

Limited awareness restricts external remedies potential

Figure 29: Not aware of brand, April 2018

Japanese heritage of Salonpas resonates with Asian adults

Figure 30: Perceptions of Salonpas, by Asian race, April 2018

### The Consumer – What You Need to Know

Pain is universal

Pain sufferers are actively managing pain

Identifying pain triggers can help sell relief

Pain sufferers seek treatment information from multiple sources

Store brand pain relievers bring more than a low price

External remedies offering longer lasting relief could bring in new users

### Pain Experience

Pain is pervasive

Figure 31: Pain experience, April 2018

Pain isn't isolated to one part of the body

Figure 32: Repertoire of any pain experience, by gender and age, April 2018

Certain pain points are more prevalent based on age

Figure 33: Head, abdominal, knee, and hip pain experience, by age, April 2018

Figure 34: Source of pain, by pain experience, April 2018

**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)

# OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

## Pain Treatment

### Pain sufferers seek relief

Figure 35: Pain treatment – Any type of pain (net), April 2018

### Young adults more likely to try alternatives to traditional pain relievers

Figure 36: Pain treatment – Any type of pain (net), by gender and age, April 2018

### Changing US demographics could impact market

Figure 37: Select pain treatment – Any type of pain (net), by race and Hispanic origin, April 2018

### More pain, more remedies used

Figure 38: Select pain treatment – Any type of pain (net), by repertoire of pain experience, April 2018

## Source of Pain

### Health and movement equally cause pain; uncertainty a barrier to treatment

Figure 39: Source of pain, April 2018

### Health pain sources and age linked

Figure 40: Select sources of pain, by age, April 2018

## Pain Management Information

### Pain sufferers are gathering information from multiple sources

Figure 41: Pain management information, April 2018

### People look for information where they are

Figure 42: Select pain management information, by age, April 2018

## Attitudes toward Store Brand Remedies

### Store brand pain relievers bring more than a low price

Figure 43: Attitudes toward store brand remedies, April 2018

Figure 44: Multi-outlet sales of OTC pain management medication and devices, by private label, rolling 52 weeks 2017 and 2018

### Younger women are seeking a deal

Figure 45: Generally choose the lowest priced pain reliever, by gender and age, April 2018

### Remedy users more willing to choose store brand versions

Figure 46: Attitudes toward store brand remedies, by pain reliever used to treat any pain location (net), April 2018

## Attitudes toward External Remedies

### Longer lasting relief wanted; safety concerns driving external use

Figure 47: Attitudes toward external remedies, by external remedy usage, April 2018

### Younger adults want proof

Figure 48: Select attitudes toward external remedies, by age, April 2018

### More pain types drives interest in new external remedies

Figure 49: Would try new external pain relieving products, by repertoire of pain experience, April 2018

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

**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)

## OTC Pain Management - US - June 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

### Appendix – The Market

Figure 50: Total US sales and forecast of OTC pain medication and devices, at inflation-adjusted prices, 2013-23

Figure 51: Total US retail sales and forecast of OTC pain medication and devices, by segment, at current prices, 2013-23

Figure 52: Total US retail sales and forecast of internal analgesics, at current prices, 2013-23

Figure 53: Total US retail sales and forecast of external analgesics, at current prices, 2013-23

Figure 54: Total US retail sales and forecast of muscle and body support devices, at current prices, 2013-23

Figure 55: Total US retail sales of OTC pain medication and devices, by channel, at current prices, 2013-18

### Appendix – Key Players

Figure 56: Multi-outlet sales of internal analgesics, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 57: Multi-outlet sales of external analgesics, by leading companies and brands, rolling 52 weeks 2017 and 2018

Figure 58: Multi-outlet sales of muscle/body support devices, by leading companies and brands, rolling 52 weeks 2017 and 2018

### Appendix – The Consumer

Figure 59: US population, by race and Hispanic origin, 2013-23

Figure 60: Correspondence analysis – Pain treatment, April 2018

Methodology

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)