

Over-the-Counter (OTC) Analgesics Market Assessment, By Drug Type [Acetaminophen, Nonsteroidal Anti-inflammatory Drugs (NSAIDs), Salicylates, Other Analgesics], By Route of Administration [Oral, Parenteral, Topical], By Distribution Channel [Hospital Pharmacies, Retail Pharmacies, Online Pharmacies, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global over-the-counter (OTC) analgesics market is projected to witness a CAGR of 4.25% during the forecast period 2024-2031, growing from USD 30.04 billion in 2023 to USD 41.91 billion in 2031. The expansion of the market can be attributed to growing consumer awareness of pain management, easy accessibility to OTC drugs, and the increasing popularity of self-medication. Additionally, the cost-efficient nature of OTC analgesics, the expansion of the geriatric population, and the growing prevalence of different diseases positively influence the expansion of the global OTC analgesics market.

Furthermore, the rising efforts by the leading pharmaceutical companies to propel the availability of analgesics are also providing lucrative growth opportunities to the market. In March 2023, Perrigo Company plc, one of the leading providers of consumer self-care products, announced that they had been approved by the US Food and Drug Administration (FDA) for their abbreviated new drug application (ANDA) for Ibuprofen and Acetaminophen tablets. This prescription-to-OTC approval strengthens the company's development and regulatory capabilities, allowing it to grow its business at a rapid rate and meet consumer requirements.

Additionally, the growing preference for self-medication is one of the major drivers of the global Over-the-Counter (OTC) analgesics market. Patients are increasingly opting for self-medication to effectively manage minor health conditions due to its convenient nature and growing lifestyle complexities. This increase is boosting the demand for OTC analgesics as they allow individuals to manage their pain in a cost and time-efficient manner without requiring a visit to a healthcare professional. The easy accessibility to OTC analgesics coupled with the rapid expansion of online pharmacies also propels the global demand for

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OTC analgesics. Online pharmacies, in particular, are expected to play a significant role in boosting the reach of OTC analgesics as they allow consumers to compare prices and provide detailed product descriptions, aiding them in making informed decisions.

Expansion of Geriatric Population Boosts Market Demand

The rapid expansion of the geriatric population is one of the major factors boosting the global OTC analgesics market size, as the older population is more prone to chronic pain and prefers self-medication and cost-effective solutions. As per the World Health Organization (WHO) estimates, by 2030, 1 in 6 individuals across the globe will be sixty or older, propelling the demand for OTC analgesics. Persistent musculoskeletal pain is highly prevalent among the older population, and multisite pain contributes to significant disability among them. The older population is also more likely to experience chronic conditions that cause persistent pain, including osteoporosis, back pain, and arthritis, among others. Additionally, the natural wear and tear of muscles, joints, and bones coupled with age-related diseases results in higher incidences of pain among the elderly, bolstering the requirement for OTC analgesics. Furthermore, the older population prefers self-medication and relies on OTC analgesics for managing mild to moderate pain as they are readily available and do not require a prescription. This appeals to older individuals as they often require OTC solutions to address their immediate needs and discomfort and may not want to visit a physician frequently.

Rising Cases of Chronic Pain Causing Conditions Supports Market Expansion

Chronic pain is often caused by health conditions that last for a long period and can cause a hindrance for individuals to complete their daily tasks and function normally. Thus, individuals living with such conditions often rely on OTC analgesics for managing pain. The American Migraine Foundation (AMF) estimates that approximately 148 million individuals across the globe are suffering from chronic migraine. Other chronic conditions responsible for causing long-term pain include fibromyalgia, arthritis, and osteoporosis, among others. Additionally, prolonged periods of desk work, a sedentary lifestyle, and poor posture are propelling the occurrence of lifestyle-related conditions that are increasing the incidences of conditions, including musculoskeletal disorders, neck pain, and back pain, increasing the requirement for OTC analgesics. Furthermore, the rising cases of autoimmune diseases, including multiple sclerosis, lupus, and rheumatoid arthritis, which are known to cause inflammation and chronic pain, are also expected to provide lucrative growth opportunities to the market. According to the estimates of the WHO, over 1.8 million individuals across the globe have multiple sclerosis. Individuals suffering from such conditions often rely on OTC analgesics for the management of pain, thus bolstering the market's demand.

Topical Analgesics Witness Significant Growth

The increasing popularity of topical analgesics is supported by their minimal systemic absorption and localized action. Sprays, creams, gels, and patches are preferred by individuals looking for targeted pain relief and are often preferred by those suffering from sports injuries and musculoskeletal disorders, among others. Also, novel pharma company launches are supporting the segment's expansion. In September 2024, Mankind Pharma Ltd. launched Nimulid Strong, a spray and a gel formulation for addressing neck pain. This condition has a significant impact on the overall functioning of the body. With this launch, the company has entered the topical analgesics market. The product will be distributed across modern trade outlets and pharmacies across India. Such launches are expected to aid pharmaceutical companies in expanding their consumer healthcare portfolio. The introduction of novel and innovative products that redefine the topical analgesics segment is also expected to bolster the global over-the-counter (OTC) analgesics market growth. In July 2024, Wellness Formulations, LLC announced the launch of their Ralli Rapid Pain Relief, which combines advanced features that consumers have been anticipating with the powerful pain relief of menthol. Ralli stands out because of its unique blend of skin conditioners and penetration enhancers that deliver effective pain relief without leaving a greasy residue that can usually be found.

North America Holds Major Market Share

The growth of North America over-the-counter analgesics market can be attributed to the rising incidences of sports-related injuries due to the growing popularity of sports activities, increasing cases of musculoskeletal diseases, well-established healthcare infrastructure, and high consumer awareness. As per the estimates of Johns Hopkins Medicine, in the United States, approximately 30 million teens and children participate in some sort of organized sports every year, and over 3.5 million injuries occur each year, thus propelling the requirement for OTC analgesics for effective pain management. Furthermore, in the United States, the requirement for OTC analgesics is also increasing due to the rising prevalence of conditions such as back pain, arthritis, and migraines. According to the estimates of the AMF, over 37 million men, women, and children in the United States are suffering from migraine. Additionally, the easy availability of OTC analgesics through online and retail

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pharmacies and supermarkets supports the market's growth in North America. Meanwhile, the strong presence of leading pharmaceutical companies and market players is ensuring the availability of novel drugs in the region, positively influencing the expansion of the over-the-counter (OTC) analgesics market.

Future Market Scenario (2024-2031F)

As per the global over-the-counter analgesics market analysis, the market's demand is expected to witness significant growth in the coming years due to the rising cases of pain prevalent conditions and rapid growth of the geriatric population. The WHO estimates that by 2050, the global population accounting for individuals aged sixty and above will be 2.1 billion. This growth is expected to bolster the requirement for OTC analgesics as the older population is more prone to pains and aches. Additionally, the development of novel drug formulations, including fast-acting and sustained-release tablets, is expected to play a crucial role in the market's expansion. Moreover, the growing popularity of online pharmacies and e-commerce will provide new growth opportunities for drug manufacturers and increase consumer accessibility to a wide range of products.

Meanwhile, the market is expected to witness a shift towards organic and natural pain relief alternatives due to the increasing health consciousness among the general population and rising demand for alternatives to chemical-based medications. Key market players are also continuously investing in research and development activities to produce innovative, effective, and safer analgesics to gain a competitive edge.

Key Players Landscape and Outlook

The key players of the market are focused on selling and purchasing OTC units to utilize their resources on other products and expand their product portfolios, respectively. In October 2024, Groupe Sanofi confirmed their plans to sell a controlling stake in their OTC unit for approximately USD 17 billion (€16 billion).

Due to the rising demand for OTC analgesics, among other pharmaceutical products, market players are witnessing significant revenue growth. In August 2024, Haleon plc launched a share buyback program of up to USD 237 million (€185 million) as the company reported strong organic operating profit growth, substantial organic revenue growth, and a good first half.

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