



**Euromonitor
International**

Analgesics in US

September 2026

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KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

Topical analgesics/anaesthetic sees dynamic growth, due to perceived safety and targeted relief

Walgreen's closures accelerate shift to mass and online retail

Non-drug pain solutions disrupt loyalty to OTC analgesics

Chart 1 Value Sales 2021-2031

Chart 2 Value Sales by Category 2026

WHAT'S NEXT?

Demand for localised solutions set to drive continued growth for topical analgesics/anaesthetic

Holistic pain management will be necessary, not just a focus on OTC analgesics

Chart 1 Forecast Value Sales 2021-2031

Chart 2 Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

McNeil and Haleon leverage portfolio breadth to extend leadership

Kenvue acquisition by Kimberly-Clark set to reinforce position of McNeil

Chart 1 Company Shares 2026

Chart 2 Brand Shares 2026

CHANNELS

Amazon and Walmart drive consumers to digital-first pain relief

Rise of retail e-commerce set to continue as offline access becomes more limited

Chart 1 Retail Channels 2021-2026

PRODUCTS

Digital discovery and bundle design lead the innovation agenda

Channel-led innovation reaches consumers

Competitive encroachment redefines where value accrues

ECONOMIC CONTEXT

Chart 1 Real GDP Growth 2021-2031

Chart 2 Inflation 2021-2031

CONSUMER CONTEXT

Chart 1 Population 2021-2031

Chart 2 Population by Generation 2026

Chart 3 Consumer Expenditure 2021-2031

COUNTRY REPORTS DISCLAIMER

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