



Salonpas It's Good Medicine.

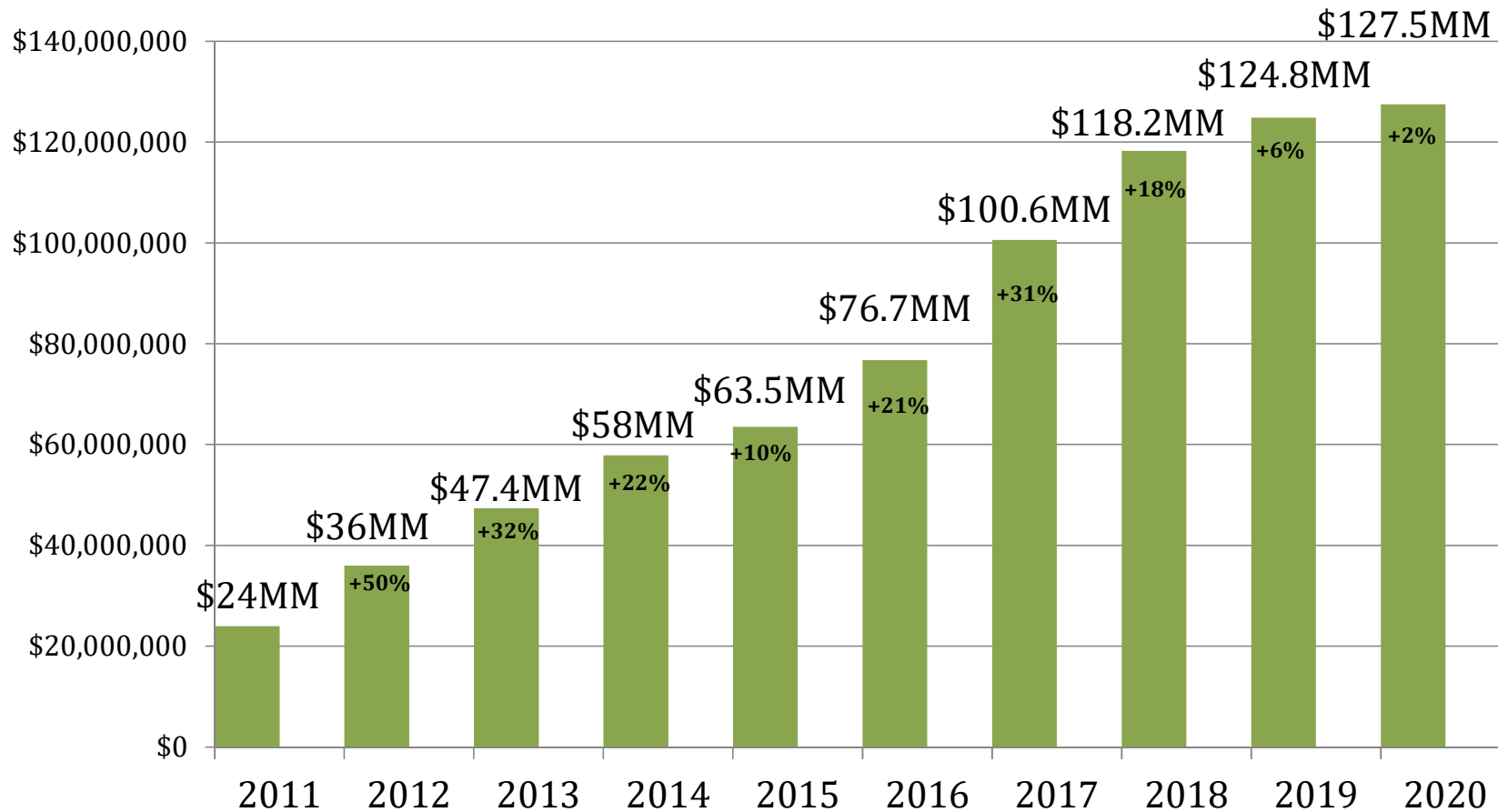
Leading the way in External Pain

ECRM February 2021





Trust Salonpas to Deliver Consistent Growth

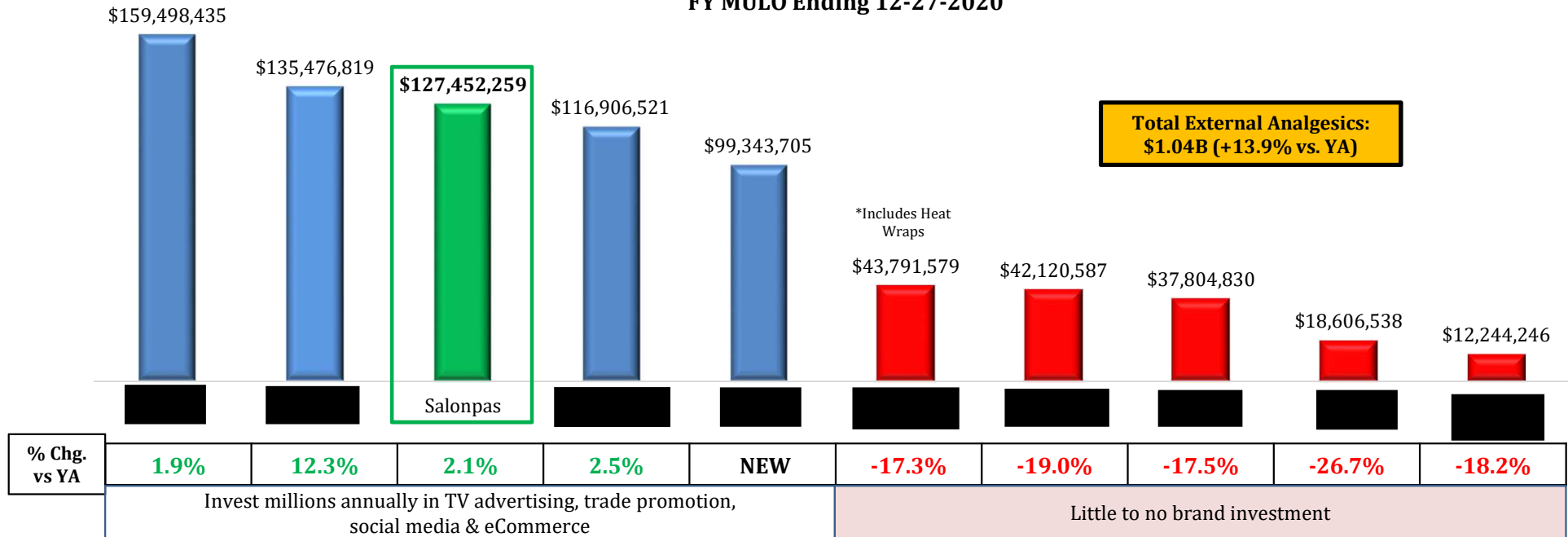


- 11th years of growth
- Highest brand awareness ever at 52%
- Share of pain patch sales at all time high of 44%
- Doctor reco's reach all time high of 26%
- #1, #2, #3 ranked Patches in the US and 5 of the top 11
- #1 liked Pain brand on Facebook
- #1 brand with Hispanics



The Top 5 Brands in External Analgesics Drive the Category

External Analgesics – Top Brands by Dollar Sales
FY MULO Ending 12-27-2020



Salonpas landed as the **#3 ranked brand** in 2020 within the category holding a 12.2% market share. Biofreeze is the top grower while Thermacare, Theraworx, Blue Emu, Bengay and Australian Dream experience double-digit declines.



Why is Salonpas “Good Medicine”

- Multiple clinical studies on support the efficacy and differentiation of Salonpas

HIGASHI STUDY - 2010



- First FDA Approved OTC Topical NSAID through NDA process

RELIEF STUDY - 2020



- Peer reviewed journal article published June 2020
- 3 major study outcomes:
 - *Improved pain relief*
 - *Enhanced quality of life*
 - *NSAID sparing benefits*
- Basis of Q1 2021 TV

Next Up: Lidocaine clinical study results targeted 2021

- Salonpas has been a long term advocate for “Topicals First” pain treatment approach
 - A safer alternative to Opioids
 - A safer alternative to OTC internal pain medications
 - Our education of medical community has led to broad support for Topical NSAID usage as first line therapy



Major Announcement from The American College of Physicians & American Academy of Family Physicians Regarding Topical Pain Medicines



New treatment guidelines for Musculoskeletal Pain

- Organizations govern roughly **300,000 physicians** and provide guidelines for treating various disease states
- **Elevated topical medications to first line therapy**

Recommendation:

ACP and AAFP recommend that clinicians treat patients with acute pain from non-low back, musculoskeletal injuries with topical nonsteroidal anti-inflammatory drugs (NSAIDs) with or without menthol gel as first-line therapy to reduce or relieve symptoms, including pain; improve physical function; and improve the patient's treatment satisfaction (Grade: strong recommendation; moderate-certainty evidence).

Implications:

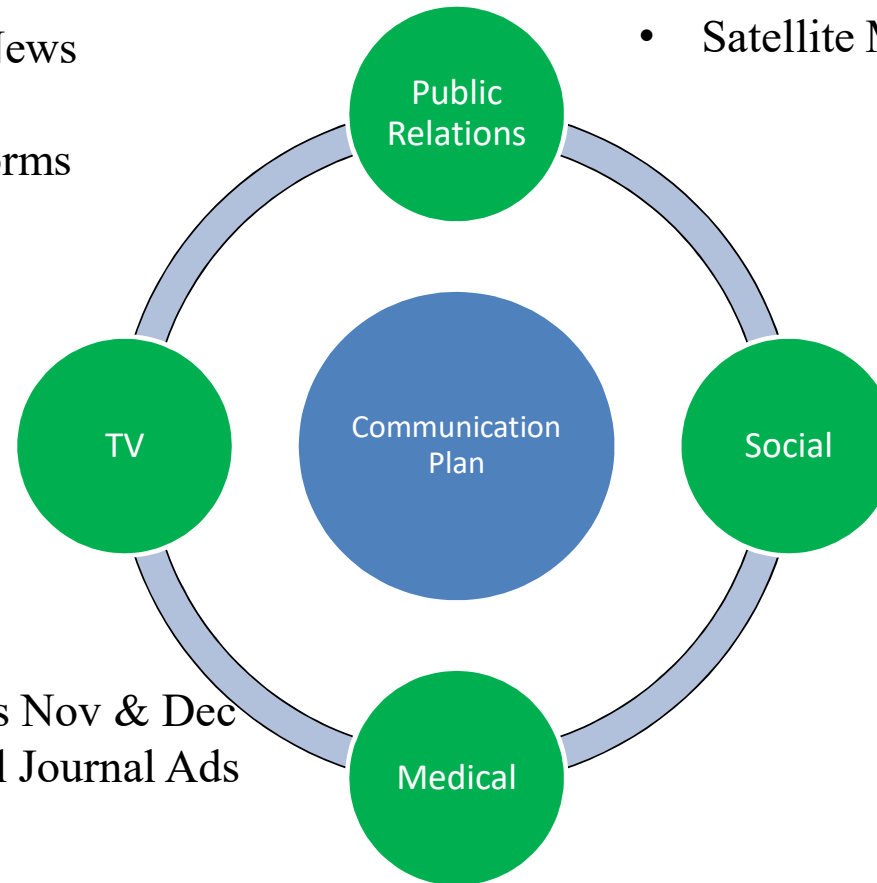
- Salonpas will benefit with 6 products containing an NSAID and have the musculoskeletal indication
- Salonpas is uniquely positioned to leverage this news to help grow your sales with our clinical / medical positioning and marketing efforts

Link to release : <https://www.acponline.org/acp-newsroom/acp-aafp-release-new-guideline-for-treatment-of-non-low-back-pain-from-musculoskeletal-injuries-in>



Salonpas Activation On ACP / AAFP Recommendation

- New TV Creative with News Airing in Q4 / Q1
- Features All Salonpas Forms Containing NSAID



- Satellite Media Tour Q4 w/ Dr. Bob Arnot

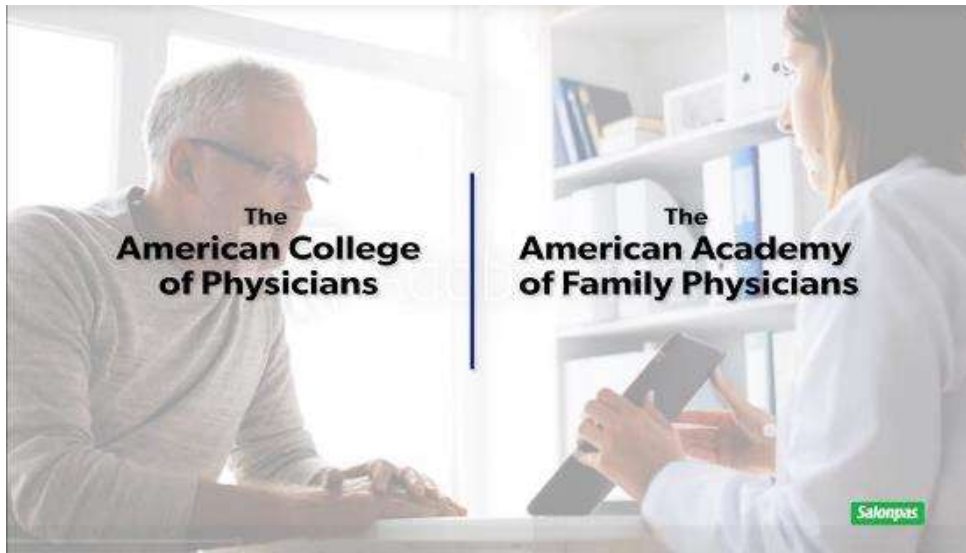


- Website Update with News - Landing Area for Social Media Activity
- Social Media Banner Ads
- Facebook Media - New Videos Featuring Dr. Bob Arnot and targeted to pain sufferers Oct - Dec



TV Ad Highlighting Topicals as a First Line Treatment

Hisamitsu®
貼るを、未来へ。
Patch, moving into the future.



Published in the Annals of Internal Medicine

Recommendation 1:

ACP and AAFP recommend that clinicians treat patients with acute pain from non-low back, musculoskeletal injuries with topical nonsteroidal anti-inflammatory drugs (NSAIDs) with or without menthol gel as first-line therapy to reduce or relieve symptoms, including

Salopas





Base Patches New TV Based on Clinical Study Findings

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Groundbreaking Claims – On Air Now!

<https://f.io/6LaPky0c>





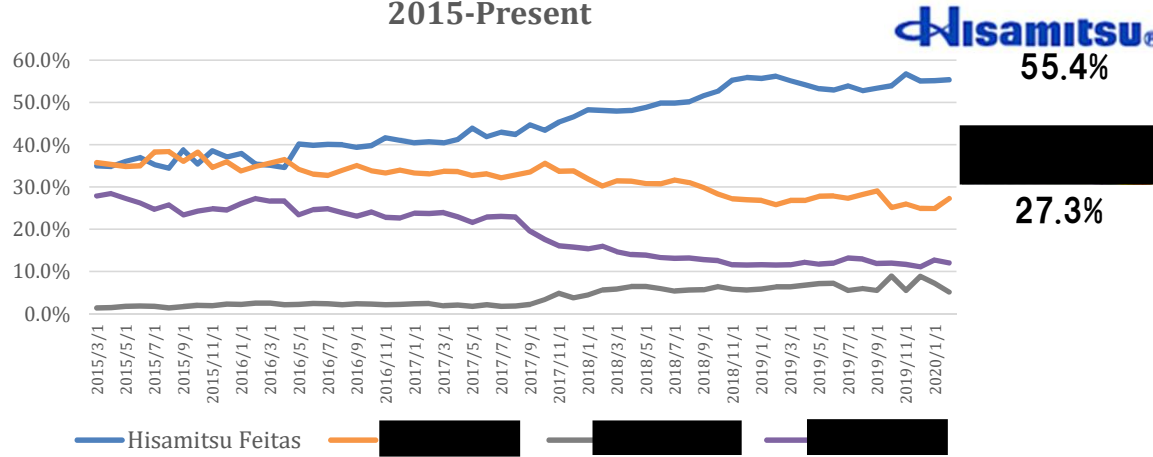
Introducing Salonpas Arthritis Pain Relief Gel

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Diclofenac is natural extension of Salonpas' line of powerful topical pain relievers

Japanese Share of Diclofenac by Major Brand
2015-Present



Ingredient focused approach with key differentiating claims

List Price
\$ [redacted] for 100g

Retail
\$17.99 - \$21.99

\$10MM of Dedicated National TV Support
On-air launch of April 2021 - will have continuity through year end

Ship date:
February 1, 2021

\$14MM - \$20MM retail sales forecast
Expected to be #4 \$ ranked Salonpas sku



New Salonpas Arthritis Pain Relief Gel Launch Plan

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Displays

National TV



Salonpas It's Good Medicine.

\$10MM of Dedicated National TV

Professional Marketing

Social Activation



First Ship
2/1/21



Salonpas
Arthritis Pain Relief Gel

PR / KOLs / Bloggers



primed **Painweek**





Salonpas Pain Relief Patch 20 ct

Salonpas It's Good Medicine.



Small, versatile size of:

- the first NDA approved OTC topical pain reliever
- the only OTC pain reliever indicated for mild to moderate pain
- targeted to smaller joints, shoulder, neck usage



More value for **consumer and retailer**:

- same retail price to consumer as Pain Relief Patch LARGE 9ct, with more pain relieving surface area in each carton
- lower list price than Pain Relief Patch LARGE



Increased sales:

- Test launch shows sales to be highly incremental to Pain Relief Patch LARGE due to different body part usage

Count	List Price	Retail Price
20 patches	\$ [REDACTED]	\$19.99

*vs \$ [REDACTED] for Pain Relief Patch Large

Salonpas Pain Relief Patch 20 Count available to ship May 1



FS 20ct vs. FS 9ct Large Size

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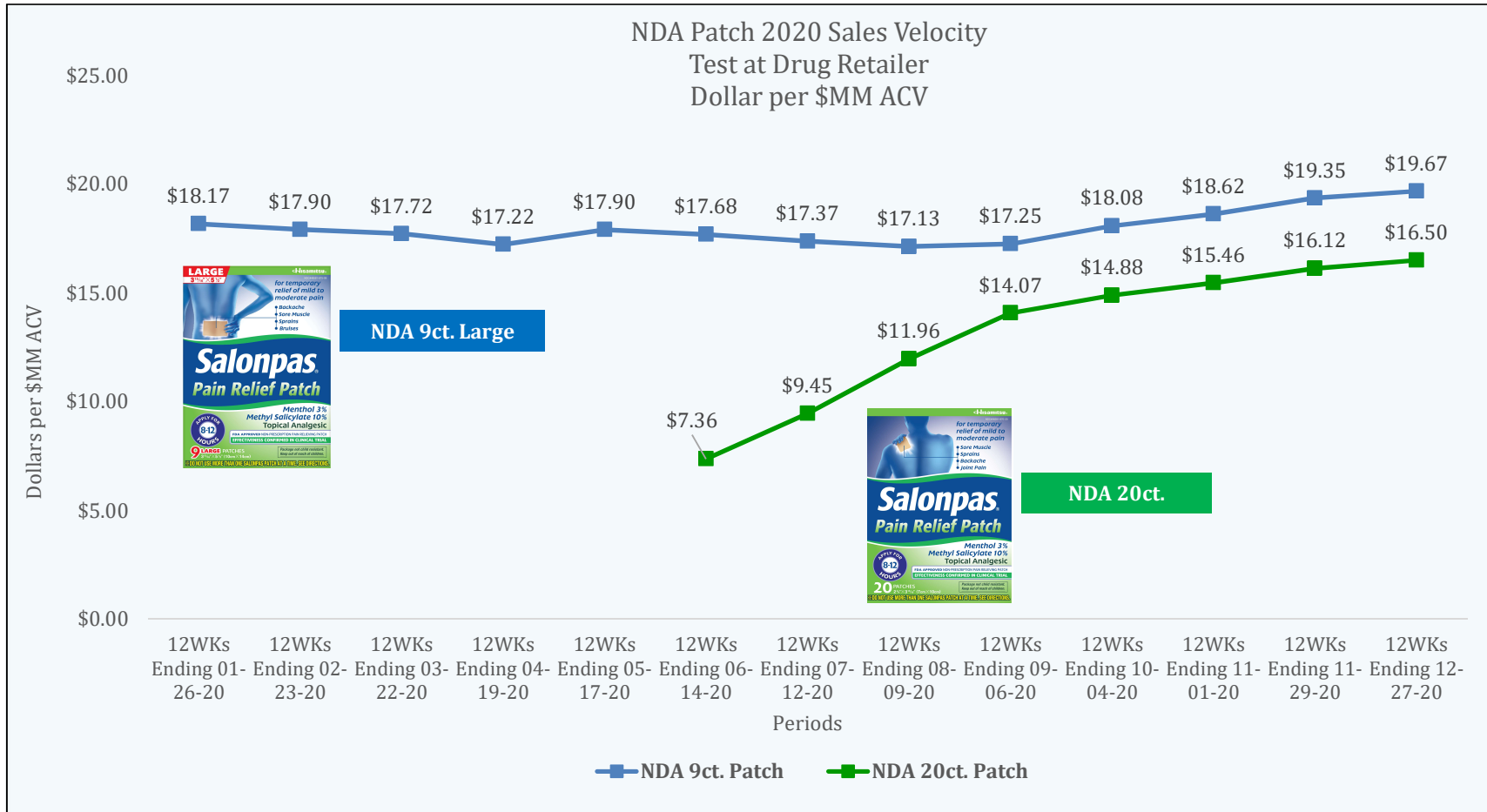
**FS 20ct for small
joints / body parts**



**FS 9ct Large for back
and large areas**



Sales rates for both items grew throughout the test





Salonpas It's Good Medicine.

Leading the way in External Pain

Thank You!

