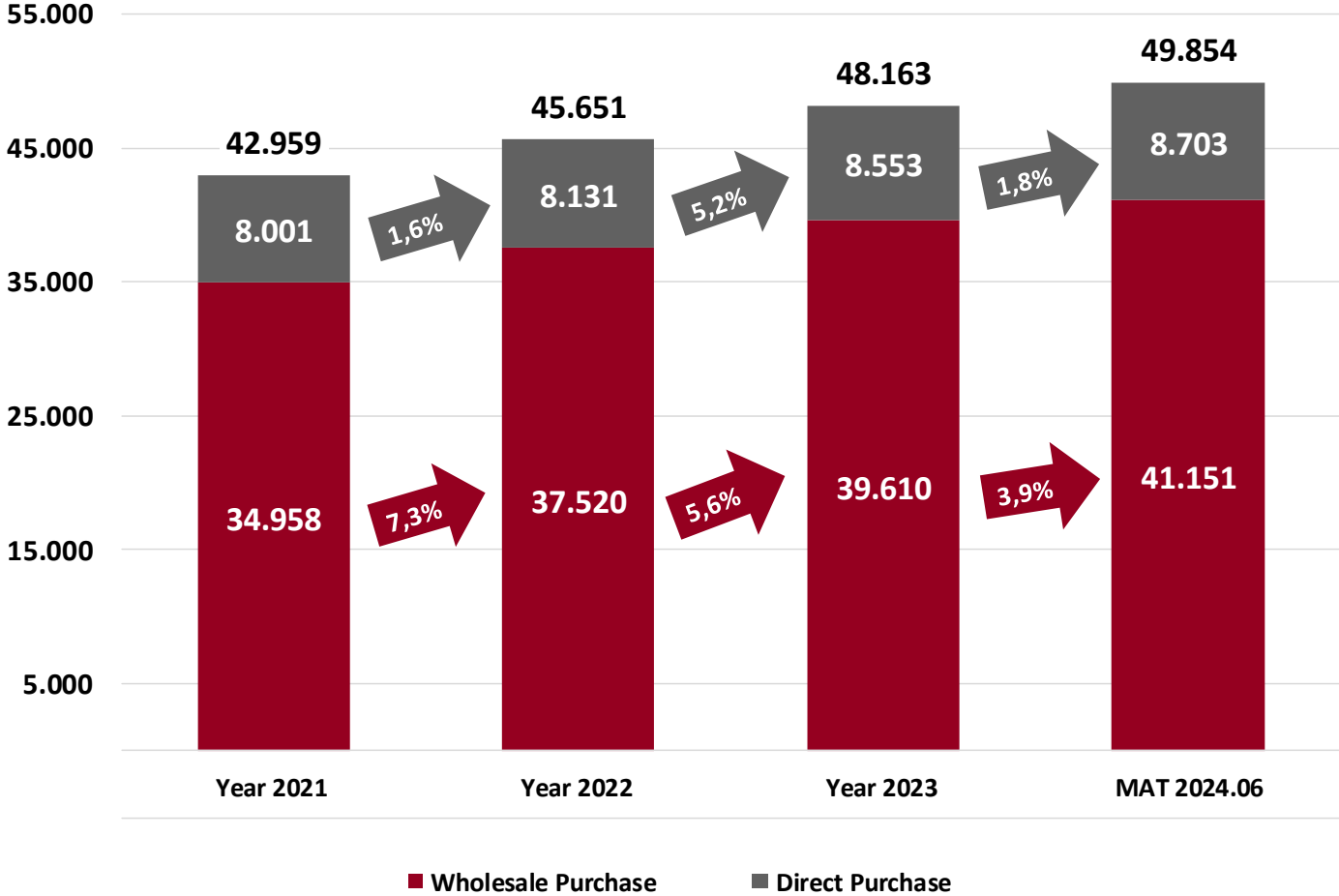




German OTC Pharmacy Market June 2024

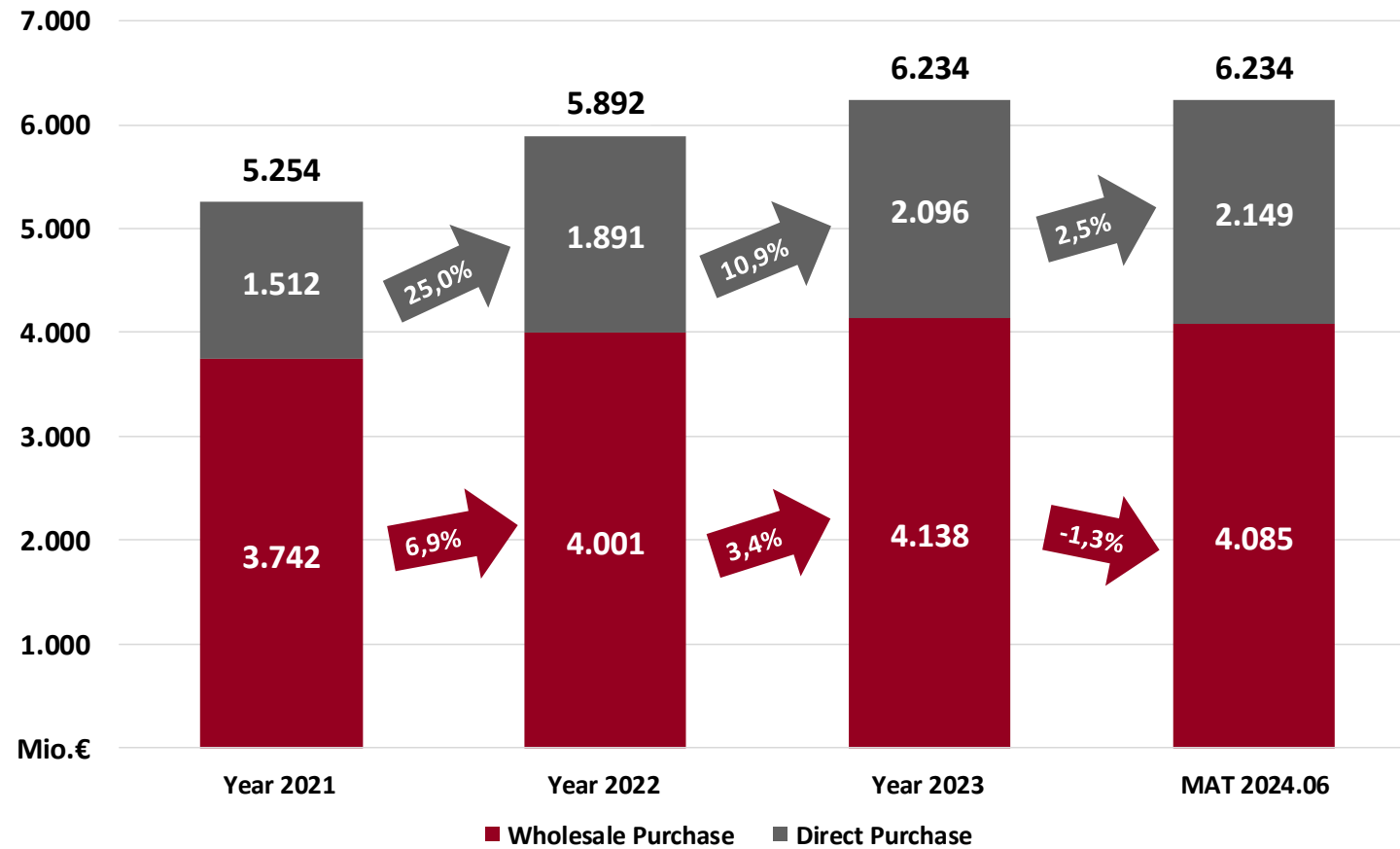
Pharmacy Sell-In: Total Market (Turnover MSP)



Pharmacy sell-in turnover: wholesale and direct purchases, all available products in pharmacies (full pharmacy assortment), Price level: manufacturer selling price (MSP) in m. Euro.

Source: INSIGHT Health

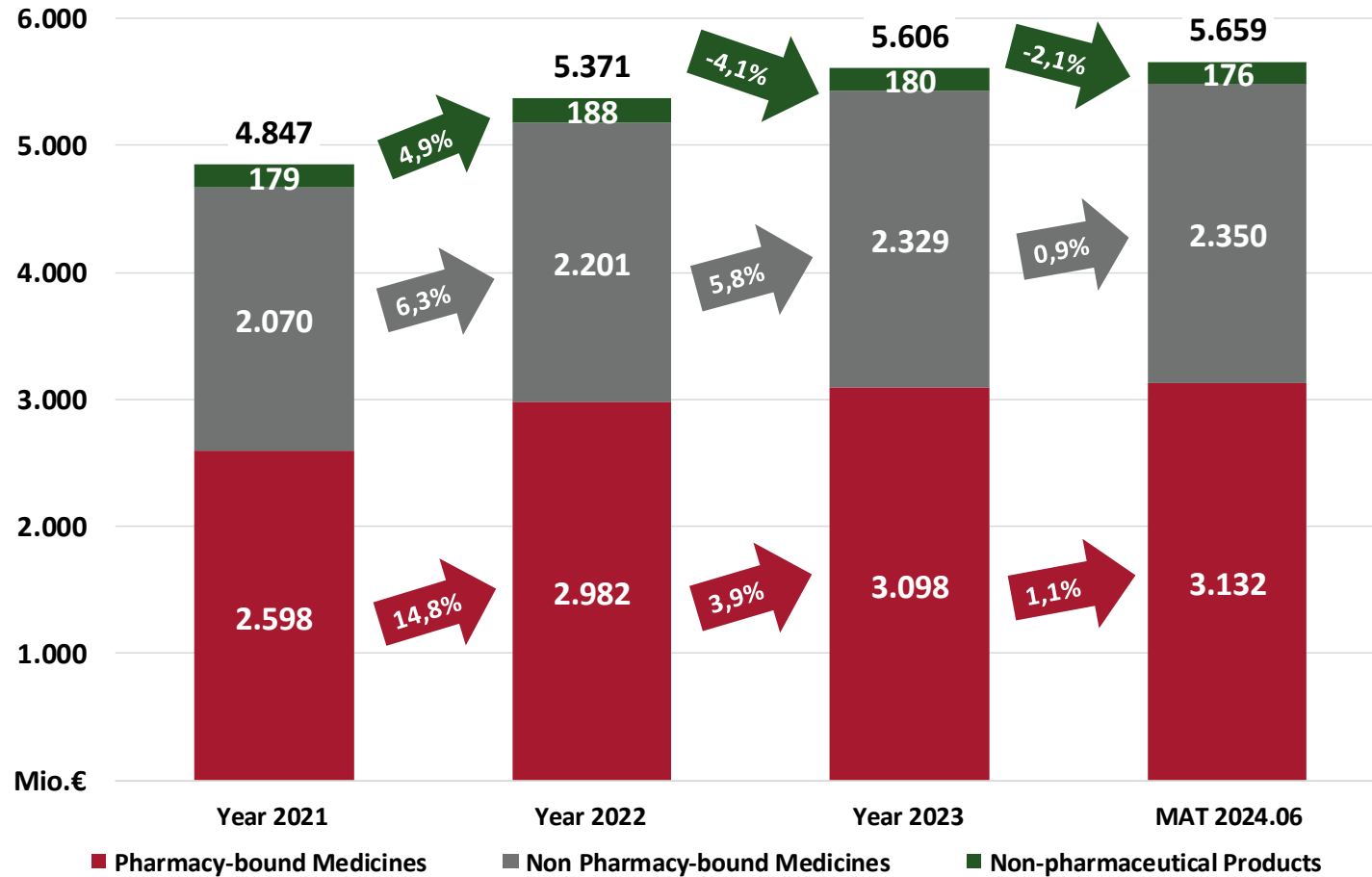
Pharmacy Sell-In: OTC Market * (Turnover MSP)



OTC Pharmacy sell-in turnover, *excl. Diagnostics: wholesale and direct purchases, price level MSP in m. Euro.

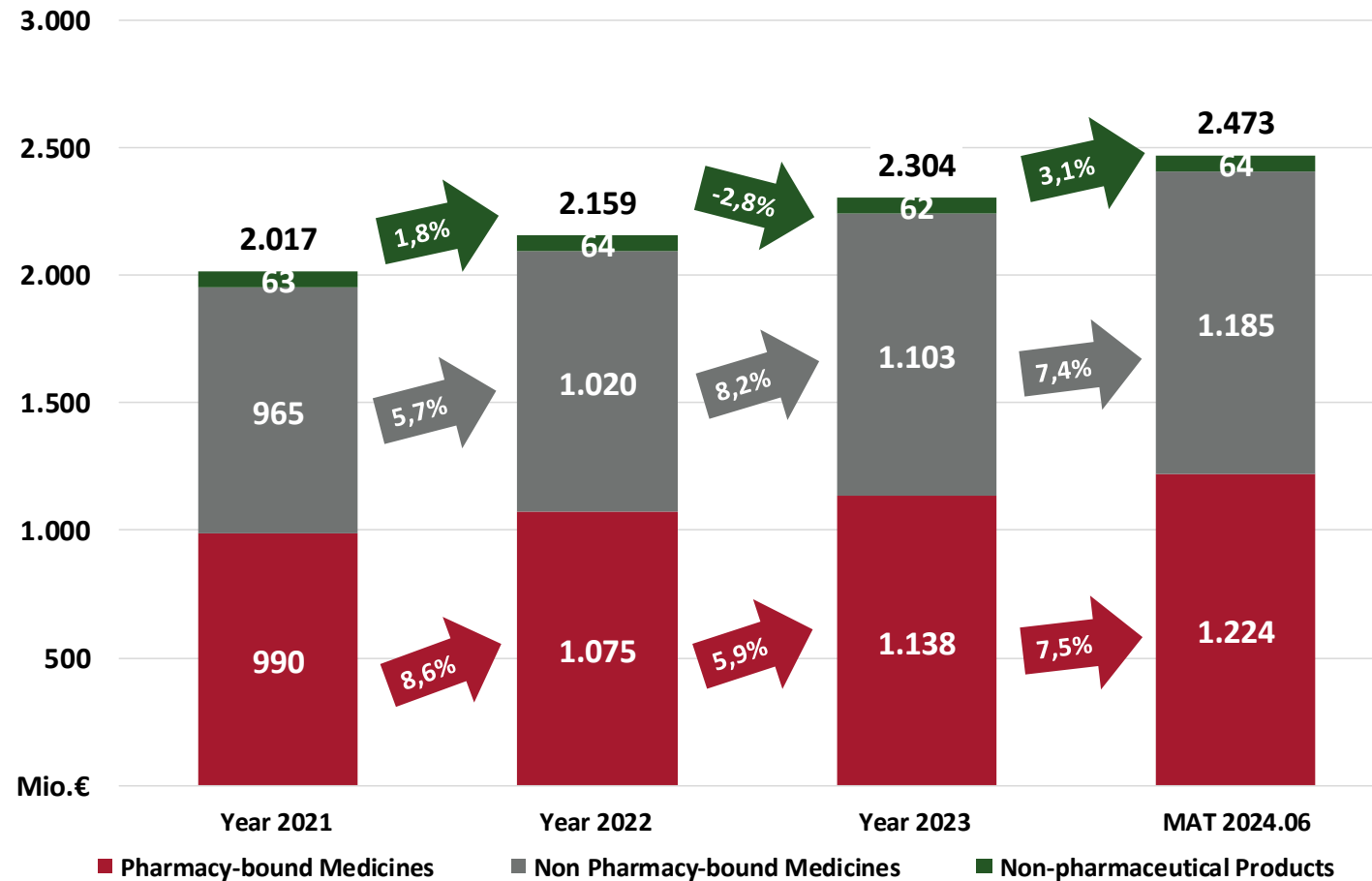
Source: APO Channel-Monitor (INSIGHT Health)

Stationary Pharmacy Sell-Out: OTC Market * (Turnover MSP)



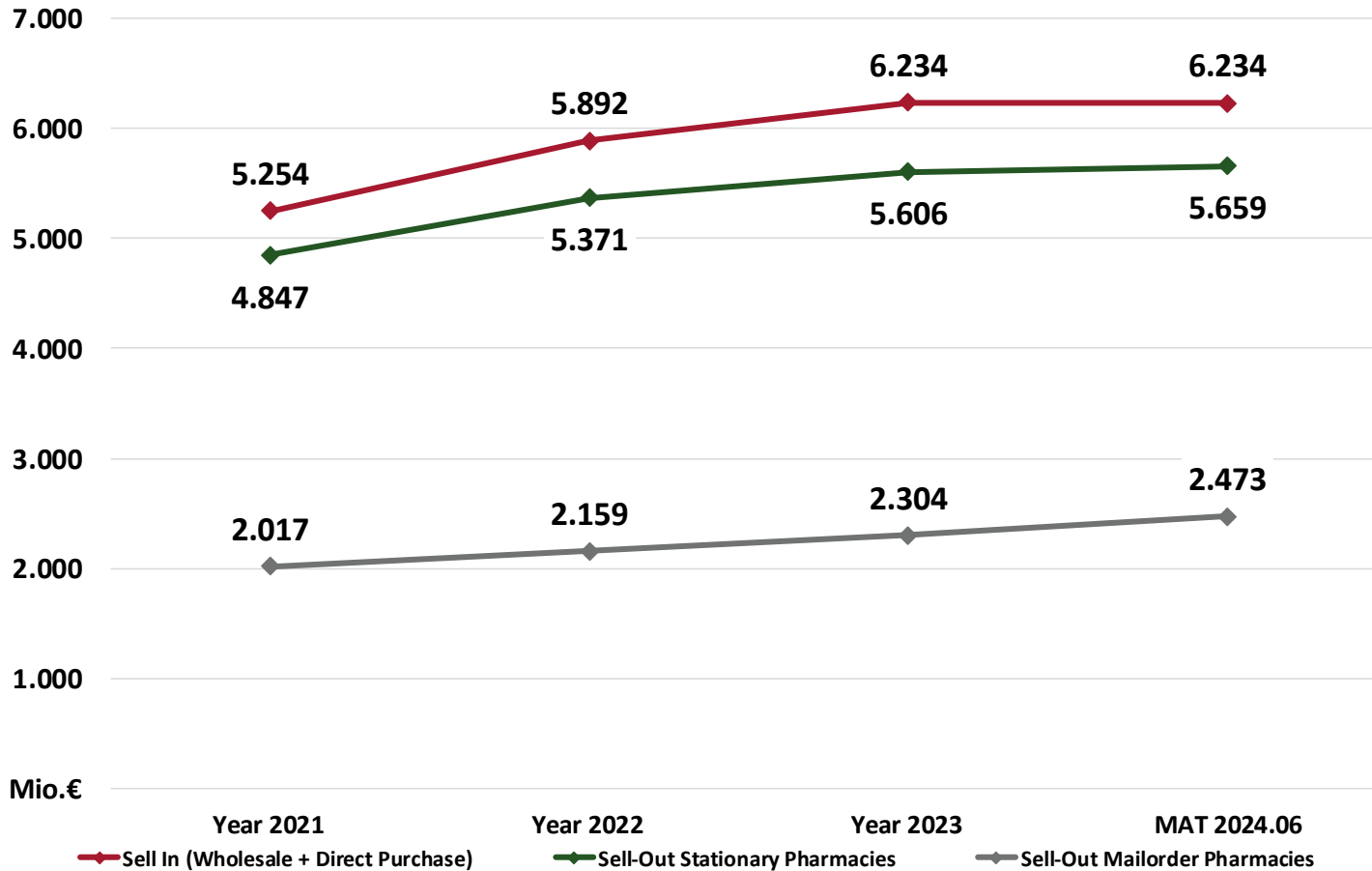
OTC sell-out turnover, *excl. Diagnostics in stationary pharmacies in MSP in m. Euro.
 Source: APO Channel-Monitor (INSIGHT Health)

Mailorder Pharmacies Sell-Out: OTC Market * (Turnover MSP)



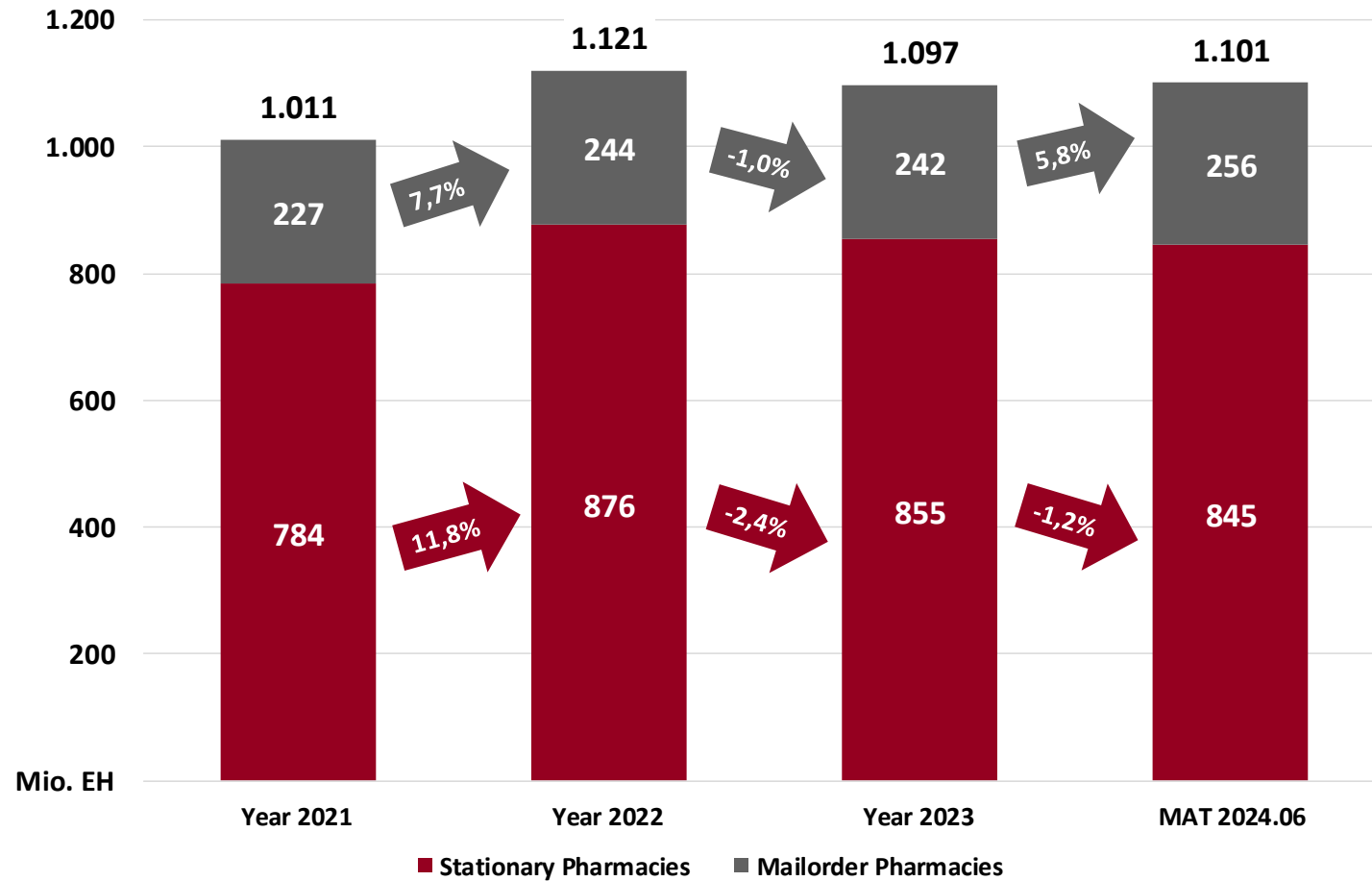
OTC sell-out turnover *excl. Diagnostics, mailorder pharmacies in MSP in m. Euro.
 Source: IH APO Channel-Monitor (INSIGHT Health & DatamedIQ)

Sell-In vs. Sell-Out: OTC Market * (Turnover MSP)



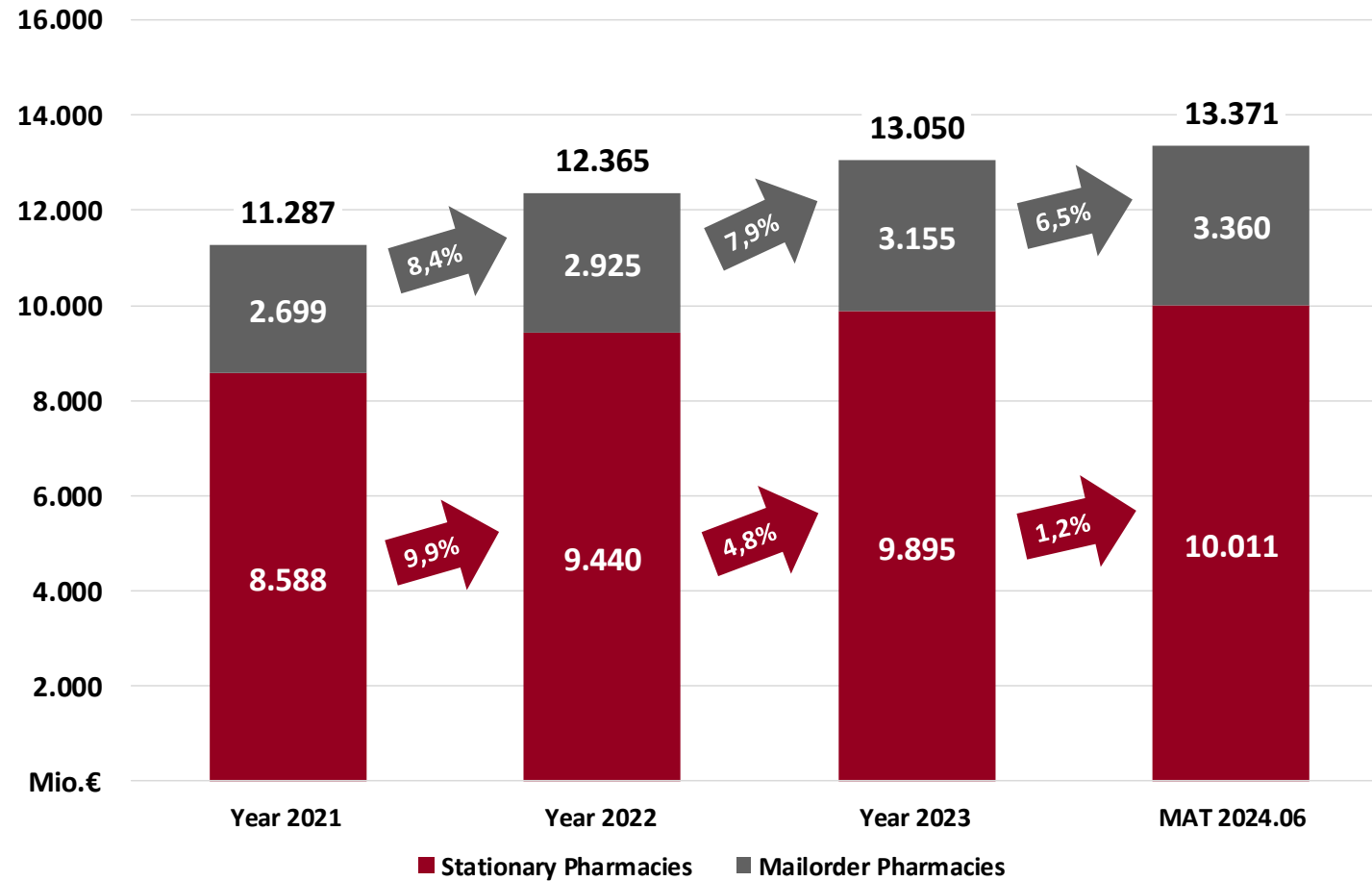
Sell-in and Sell-out in stationary and mailorder pharmacies (excl. mailorder direct sale); *excl. Diagnostics, in m. Euro.
 Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

OTC Sell-out: stationary and mailorder pharmacies (sales volume units)



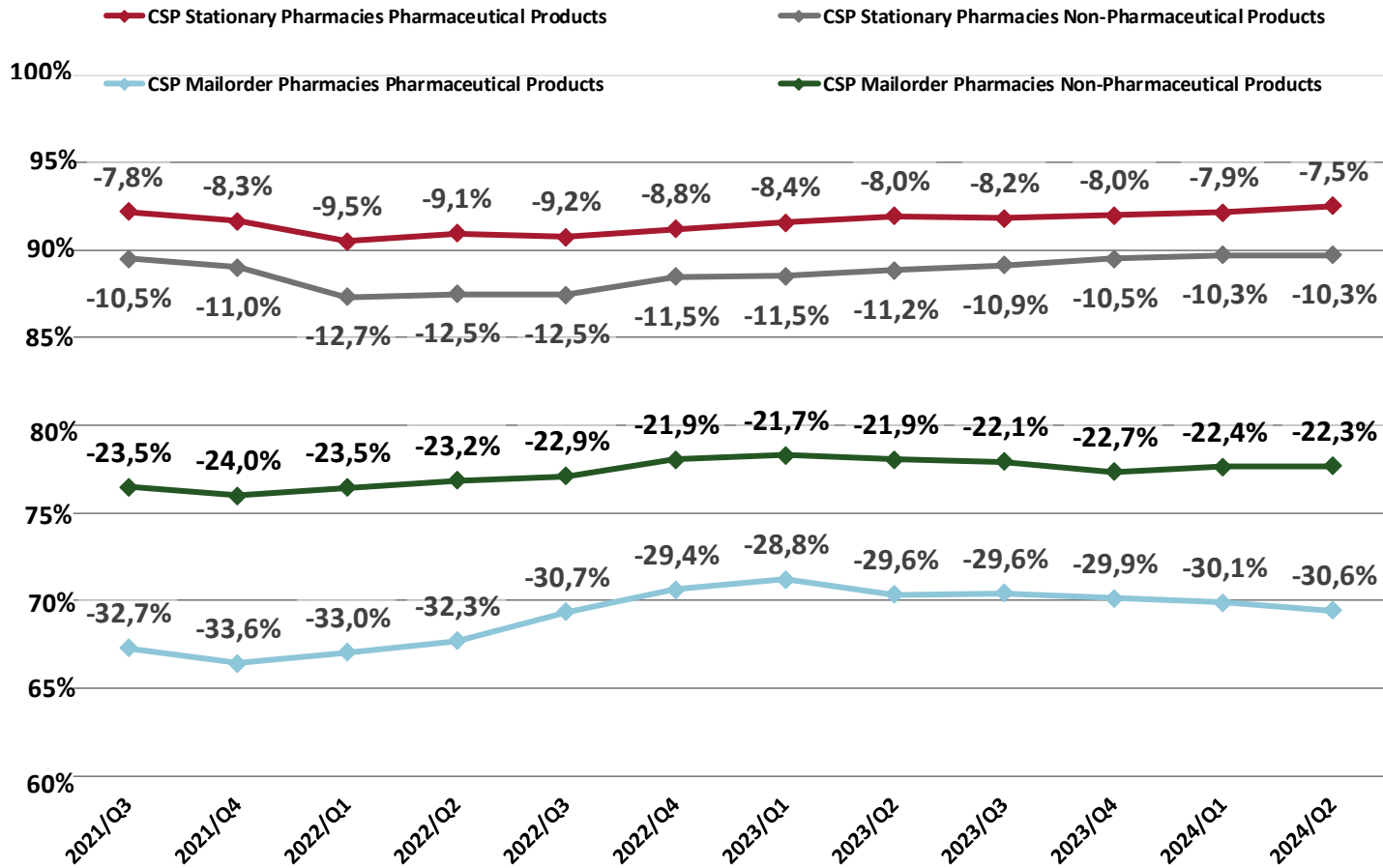
OTC Sell-out *excl. Diagnostics in stationary and mailorder pharmacies in m. units.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

OTC Sell-out: stationary and mailorder pharmacies (Turnover rPP)



OTC Sell-out turnover, *excl. Diagnostics, stationary and mailorder pharmacies, price level consumer selling price (CSP) in m. Euro.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

Stationary vs. Mailorder Pharmacies: Consumer Prices Development *



Stationary and mailorder pharmacies sell-out, *excl. Diagnostics, percentage deviation of CSP to PP.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

Stationary & Mailorder Pharmacies: TOP 3 OTC Market Segments (Pharmaceutical Products/Medicines)

	MAT 2024.06 CSP m. €	Δ m. €	±%
Top 3 - Stationary Pharmacies			
R05C Expectorants	632,9	-50,6	-7%
N02B Non-Narcotics And Anti-Pyretics	550,7	2,0	0%
R01A Topical Nasal Preparations	421,5	19,3	5%
Top 3 - Mailorder Pharmacies			
R01A Topical Nasal Preparations	125,4	21,2	20%
R05C Expectorants	124,0	6,8	6%
N02B Non-Narcotics And Anti-Pyretics	119,7	10,5	10%

Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

Stationary & Mailorder Pharmacies: TOP 3 OTC Market Segments (Non-Pharmaceutical Products/Non-Medicines)

	MAT 2024.06 CSP m. €	Δ PY m. €	±% PY
Top 3 - Stationary Pharmacies			
V06E Enteral Nutrition	235,3	23,2	11%
S01K Dry Eye Products	223,9	7,7	4%
A12C Other Mineral Supplements	158,6	3,5	2%
Top 3 - Mailorder Pharmacies			
A07Y Intestinal Health and Immune System Preparations	90,6	14,0	18%
A12C Other Mineral Supplements	84,1	7,3	10%
S01K Dry Eye Products	78,9	7,6	11%

Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

Stationary Pharmacies: TOP 3 OTC Products (Pharmaceutical and Non-Pharmaceutical Products)

	MAT 2024.06 CSP m. €	Δ m. €	±%
Top 3 - Pharmaceutical Products			
Voltaren Schmerzgel	163,9	-3,8	-2%
Sinupret	152,3	-5,2	-3%
ACC Akut	77,8	-6,7	-8%
Top 3 - Non-pharmaceutical Products			
BD Ultra Fine	74,5	-0,5	-1%
Movicol	66,0	3,7	6%
Thermacare AI5	51,5	2,7	6%

Source: APO Channel-Monitor (INSIGHT Health)

TOP 3 OTC Product Launches (last 12 months until June 2024)

	MAT 2024.06 CSP m. €	Launch
Top 3 - OTC-Pharmaceutical Products/Medicines		
Zamidine	1,4	2023_10
Xylometazolin IVC Pragen NOW	1,1	2023_09
Xylometazolin IVC Pragen GEH	0,6	2023_08
Top 3 - Non-Pharmaceutical Products/Medicines		
Oyono Nacht Intens	3,5	2023_08
Folio 1 basic	2,5	2023_08
Folio 2 basic	2,2	2023_09

Source: APO Channel-Monitor (INSIGHT Health)

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