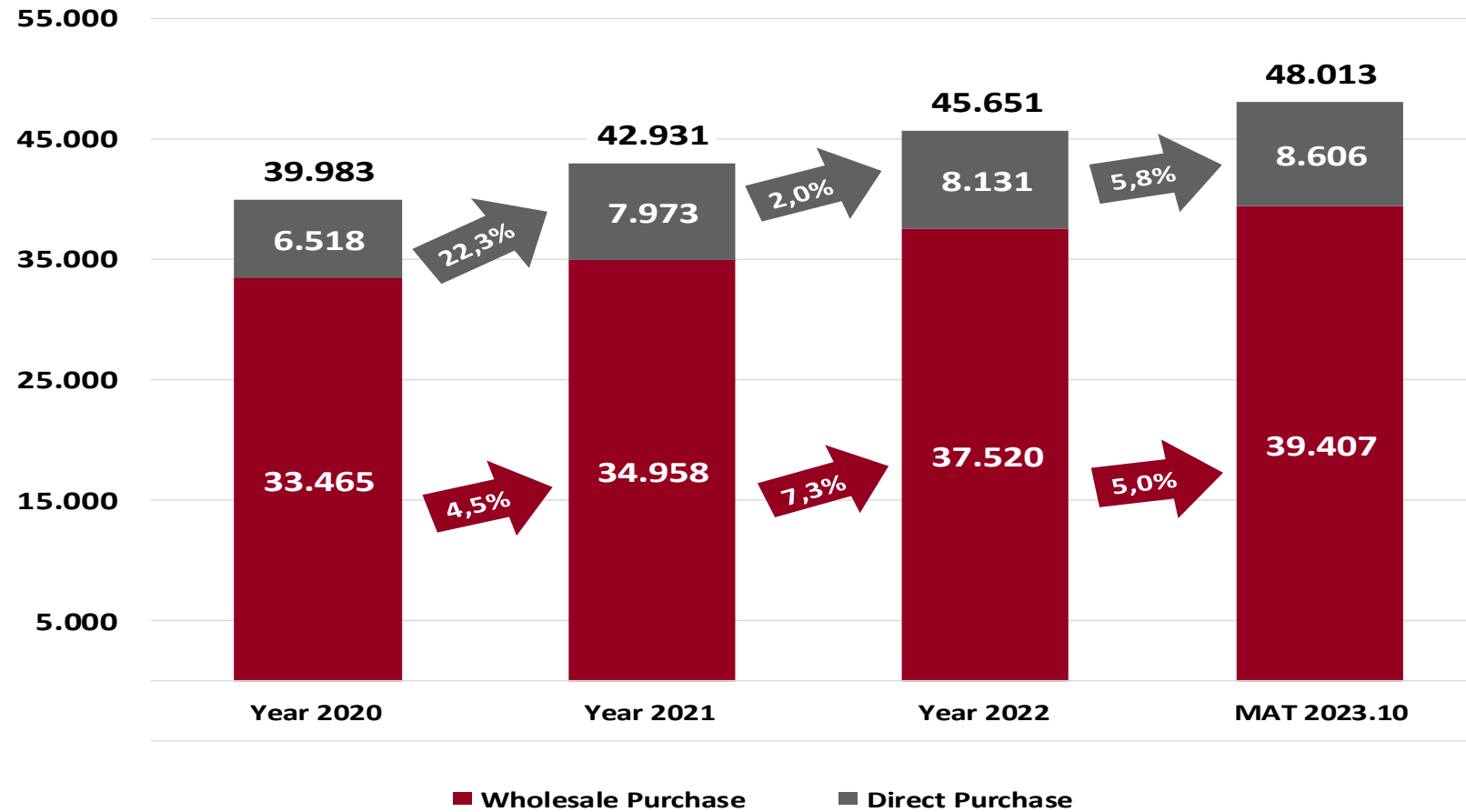




German OTC Pharmacy Market October 2023

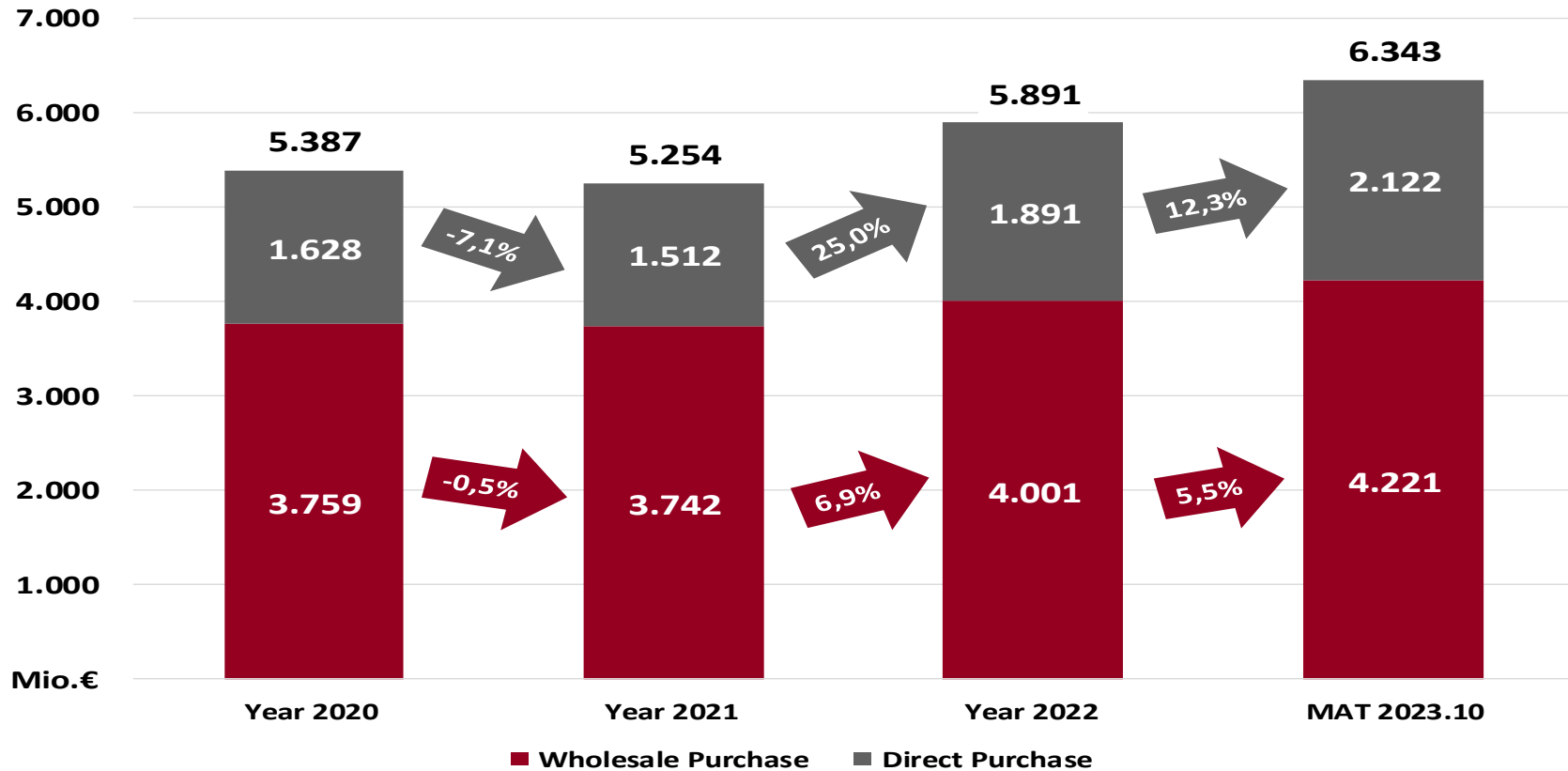
Pharmacy Sell-In: Total Market (Turnover MSP)



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.

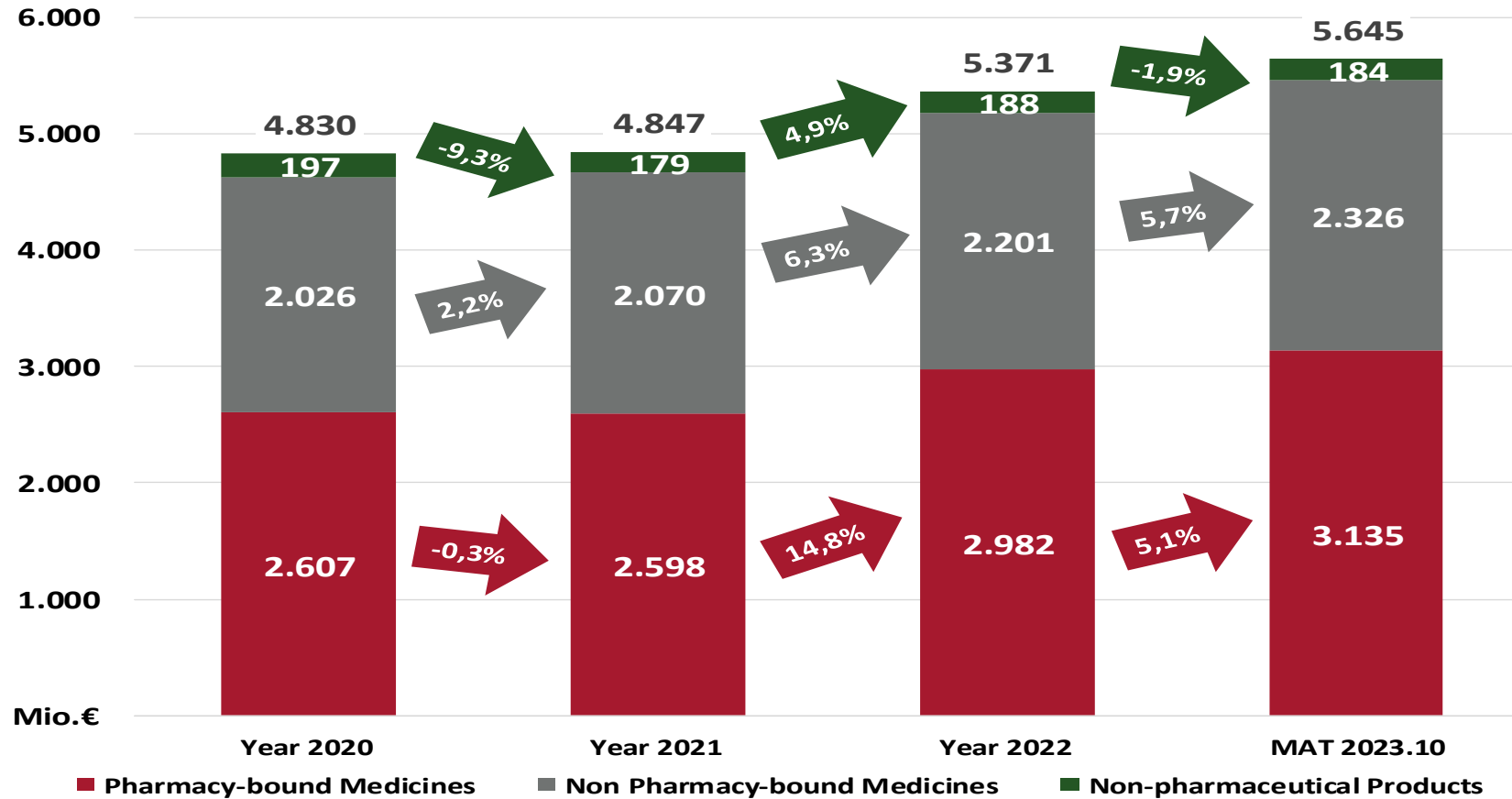
Source: INSIGHT Health

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



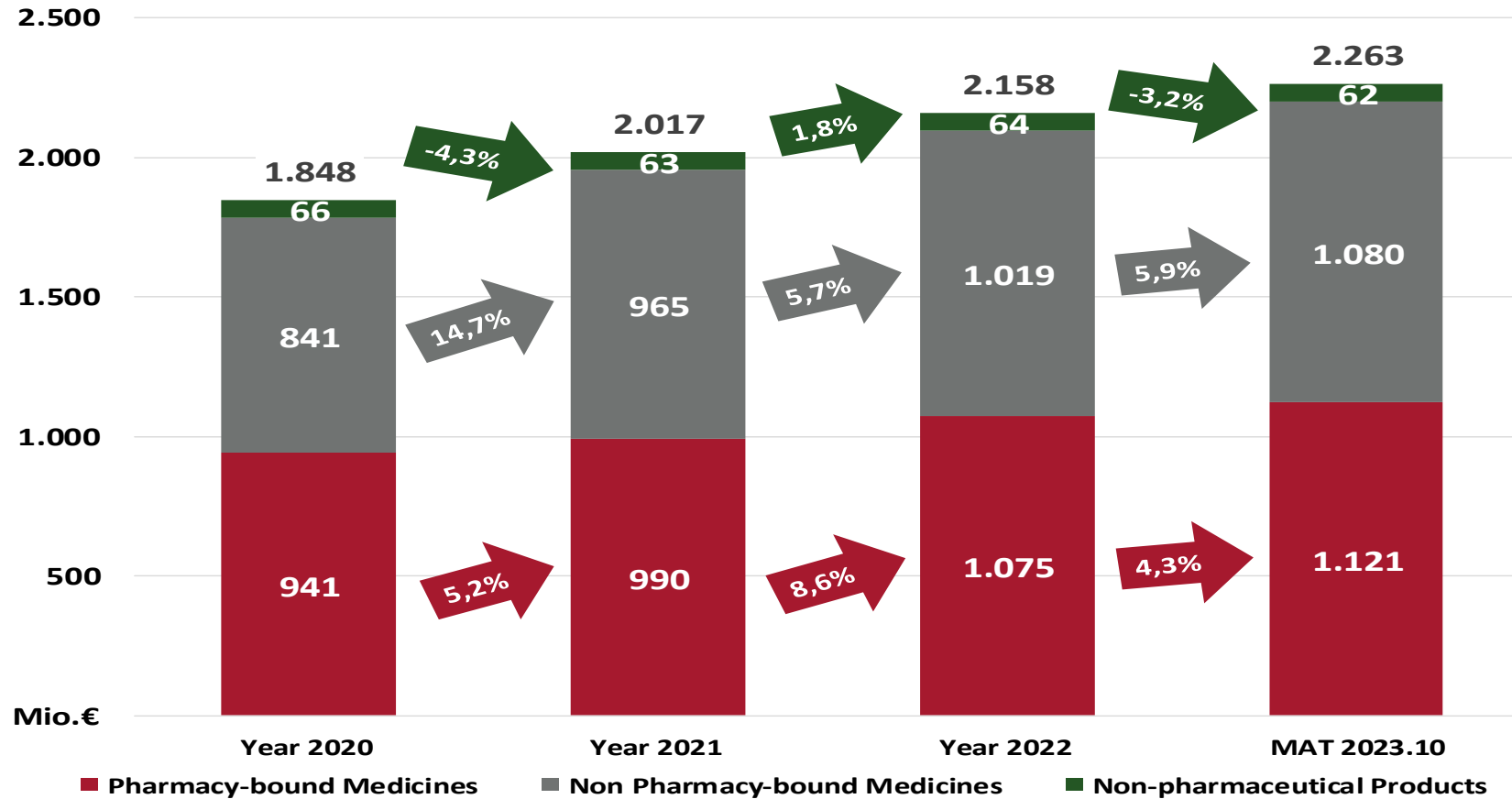
OTC Pharmacy sell-in turnover, *excl. Diagnostics: wholesale and direct purchases, price level MSP in m. Euro.
Source: APO Channel-Monitor (INSIGHT Health)

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



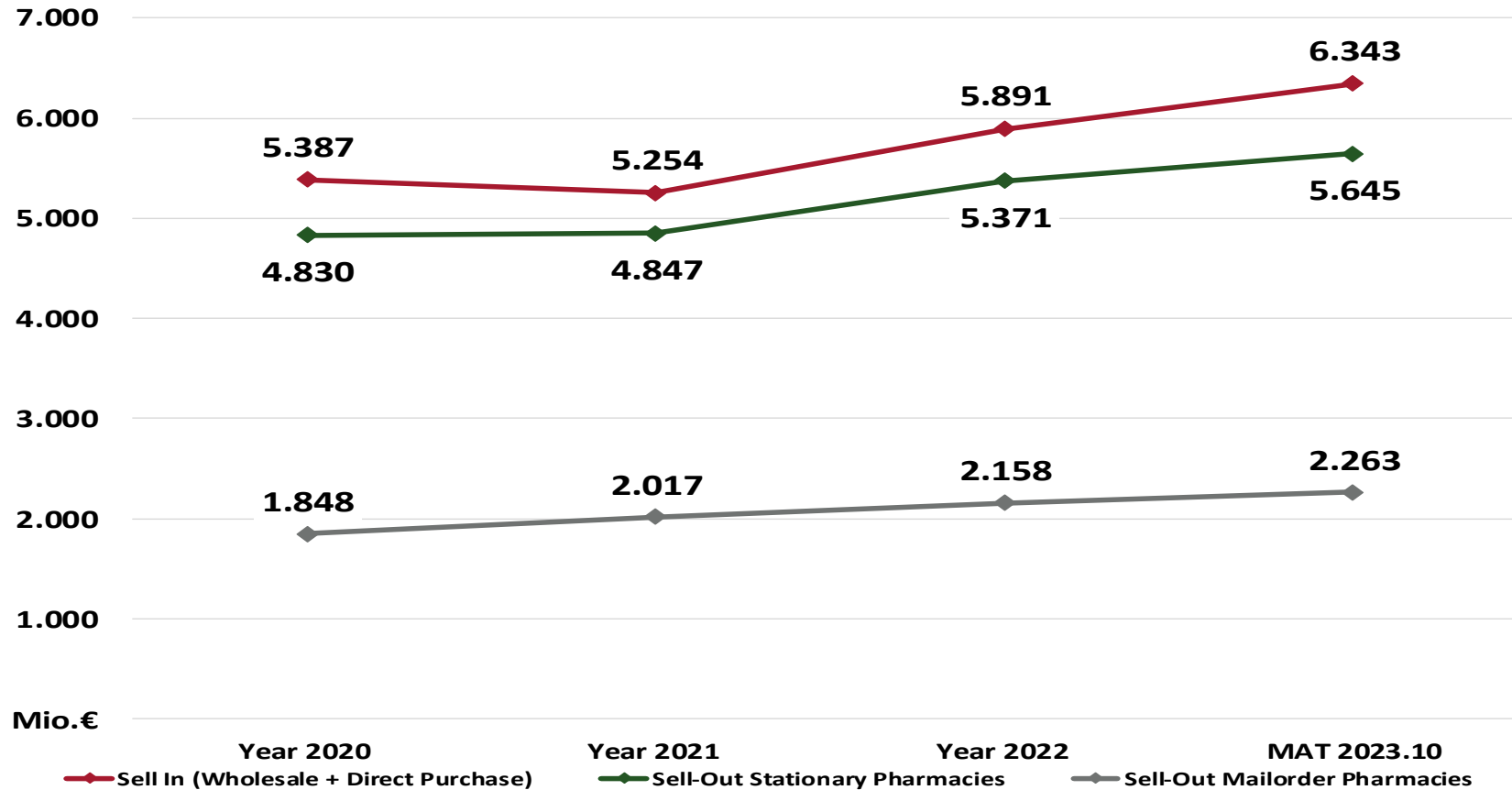
OTC sell-out turnover, *excl. Diagnostics in stationary pharmacies in MSP in m. Euro.
 Source: APO Channel-Monitor (INSIGHT Health)

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



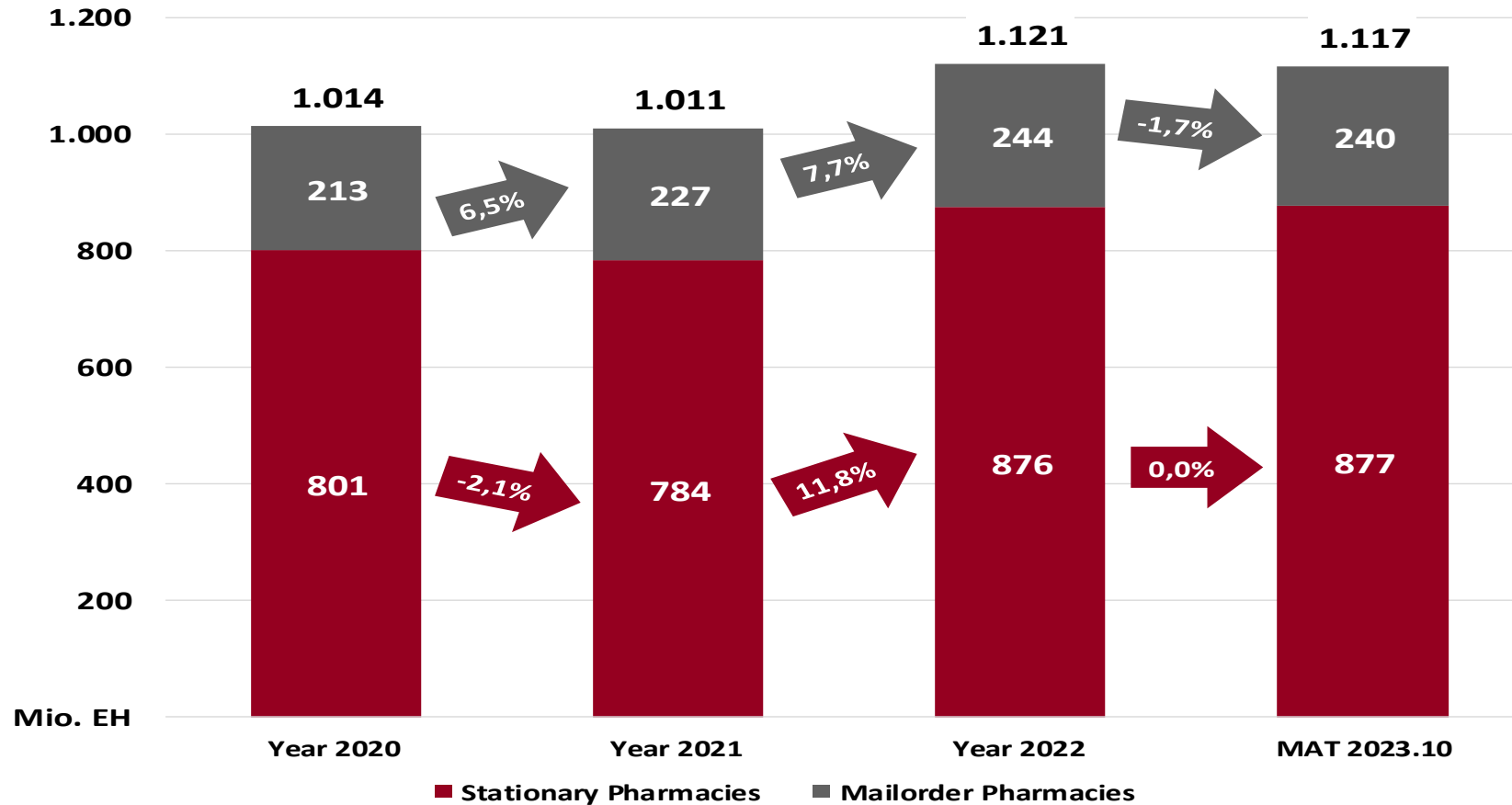
OTC sell-out turnover *excl. Diagnostics, mailorder pharmacies in MSP in m. Euro.
 Source: IH APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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



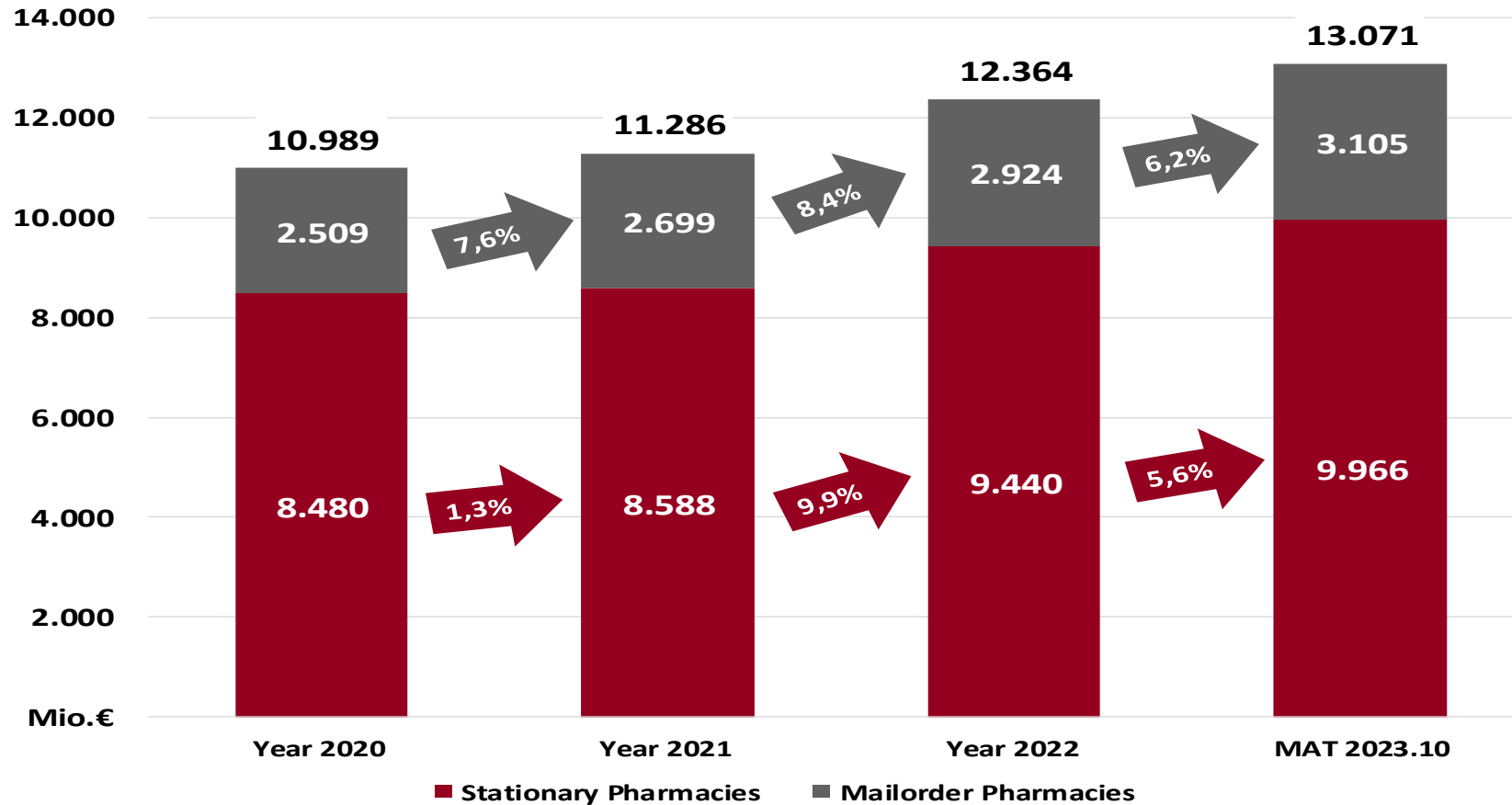
Sell-in and Sell-out in stationary and mailorder pharmacies (excl. mailorder direct sale); *excl. Diagnostics, in m. Euro.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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



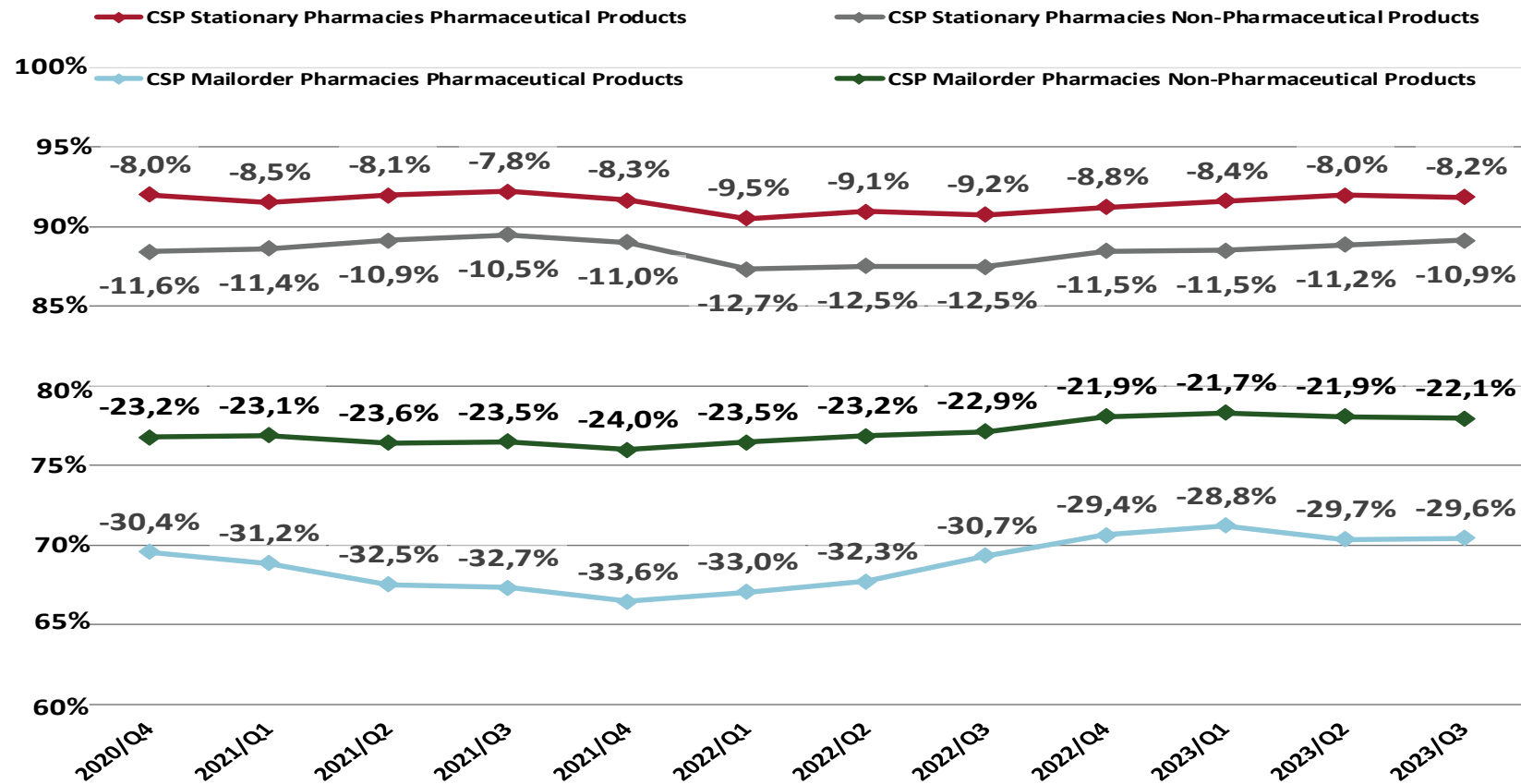
OTC Sell-out *excl. Diagnostics in stationary and mailorder pharmacies in m. units.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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 2023.10 rAVP €	Δ Mio. €	±%
Top 3 - Stationary Pharmacies			
R05C Expectorants	662,6	174,2	36%
N02B Non-Narcotics And Anti-Pyretics	543,8	36,2	7%
R01A Topical Nasal Preparations	409,3	76,3	23%
Top 3 - Mailorder Pharmacies			
R05C Expectorants	119,6	30,9	35%
N02B Non-Narcotics And Anti-Pyretics	114,0	15,1	15%
R01A Topical Nasal Preparations	106,1	11,5	12%

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

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

	MAT 2023.10 CSP €	Δ PY m. €	±% PY
Top 3 - Stationary Pharmacies			
D02J Face Care	246,9	5,4	2%
V06E Enteral Nutrition	222,6	32,0	17%
S01K Dry Eye Products	219,4	14,7	7%
Top 3 - Mailorder Pharmacies			
D02J Face Care	94,8	3,5	4%
A07Y Intestinal Health and Immune System Preparations	81,0	12,8	19%
A12C Other Mineral Supplements	78,1	4,1	5%

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

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

	MAT 2023.10 rAVP €	Δ Mio. €	±%
Top 3 - Pharmaceutical Products			
Voltaren Schmerzgel	168,2	-0,7	0%
Sinupret	155,6	40,5	35%
ACC Akut	80,9	17,7	28%
Top 3 - Non-pharmaceutical Products			
BD Ultra Fine	75,7	3,5	5%
Movicol	64,4	2,0	3%
Thermacare AI5	49,7	-1,6	-3%

Source: APO Channel-Monitor (INSIGHT Health)

TOP 3 OTC Product Launches (last 12 months until October 2023)

	MAT 2023.10 CSP €	Launch
Top 3 - OTC-Pharmaceutical Products/Medicines		
Allegra Allergie	9,4	2023_01
Synofen	4,6	2023_01
Linola Duo	2,8	2023_01
Top 3 - Non-Pharmaceutical Products/Medicines		
Lunalaif Guter Schlaf	3,2	2022_11
Elotrans reload	2,1	2023_05
Olivenoel Nacht	2,0	2023_01

Source: APO Channel-Monitor (INSIGHT Health)

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