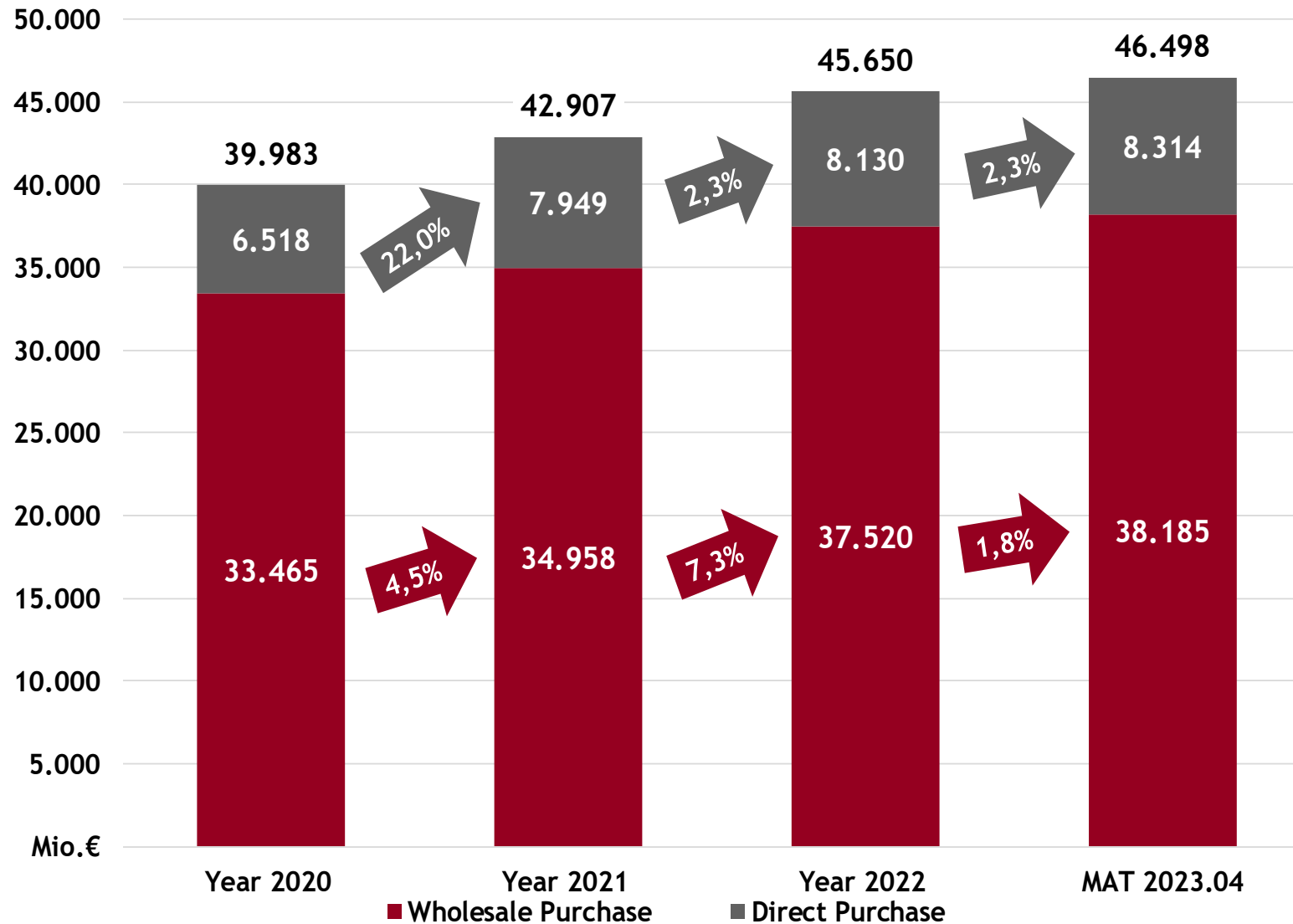




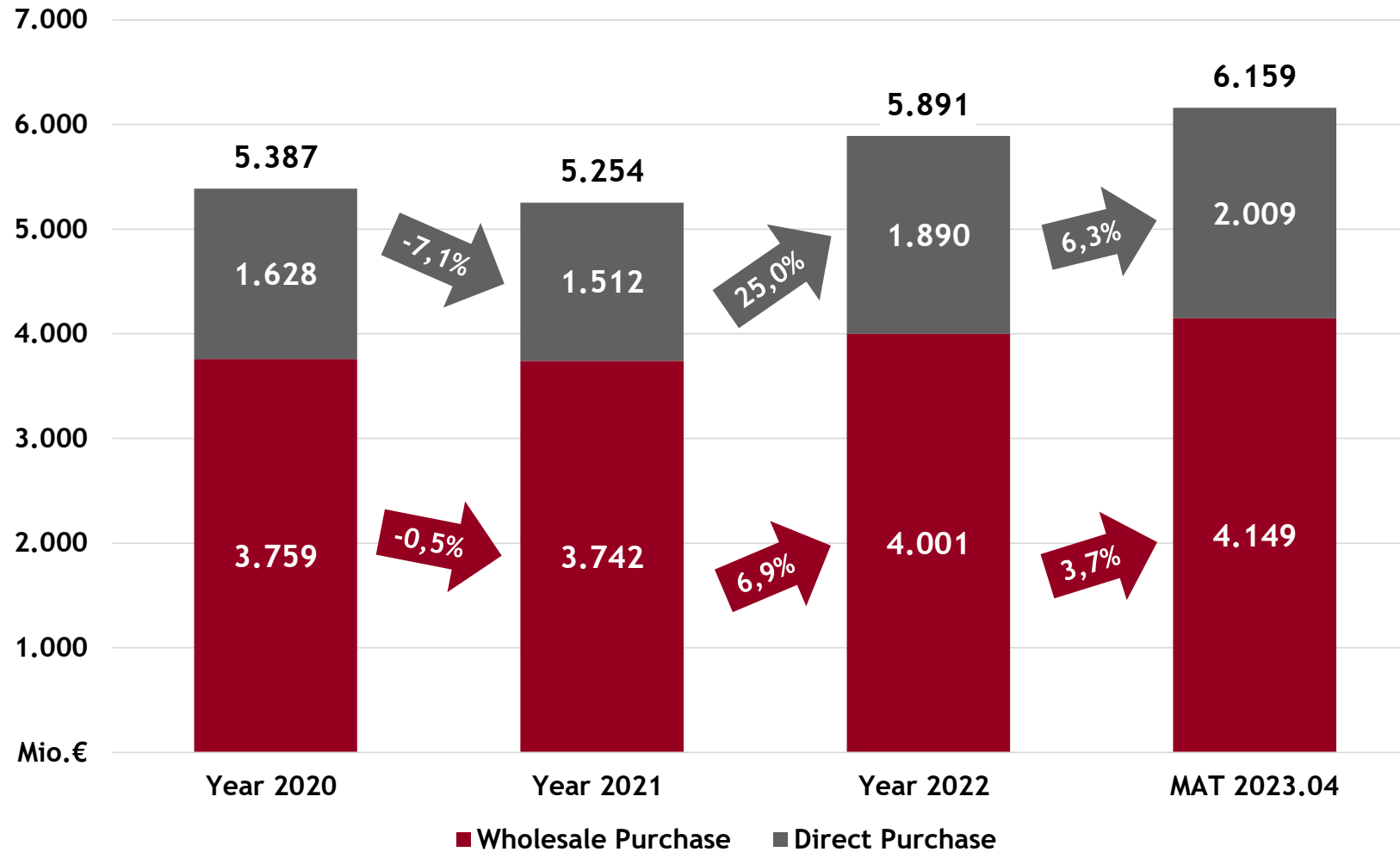
German OTC Pharmacy Market April 2023

Pharmacy Sell-In: Total Market (Turnover MSP)



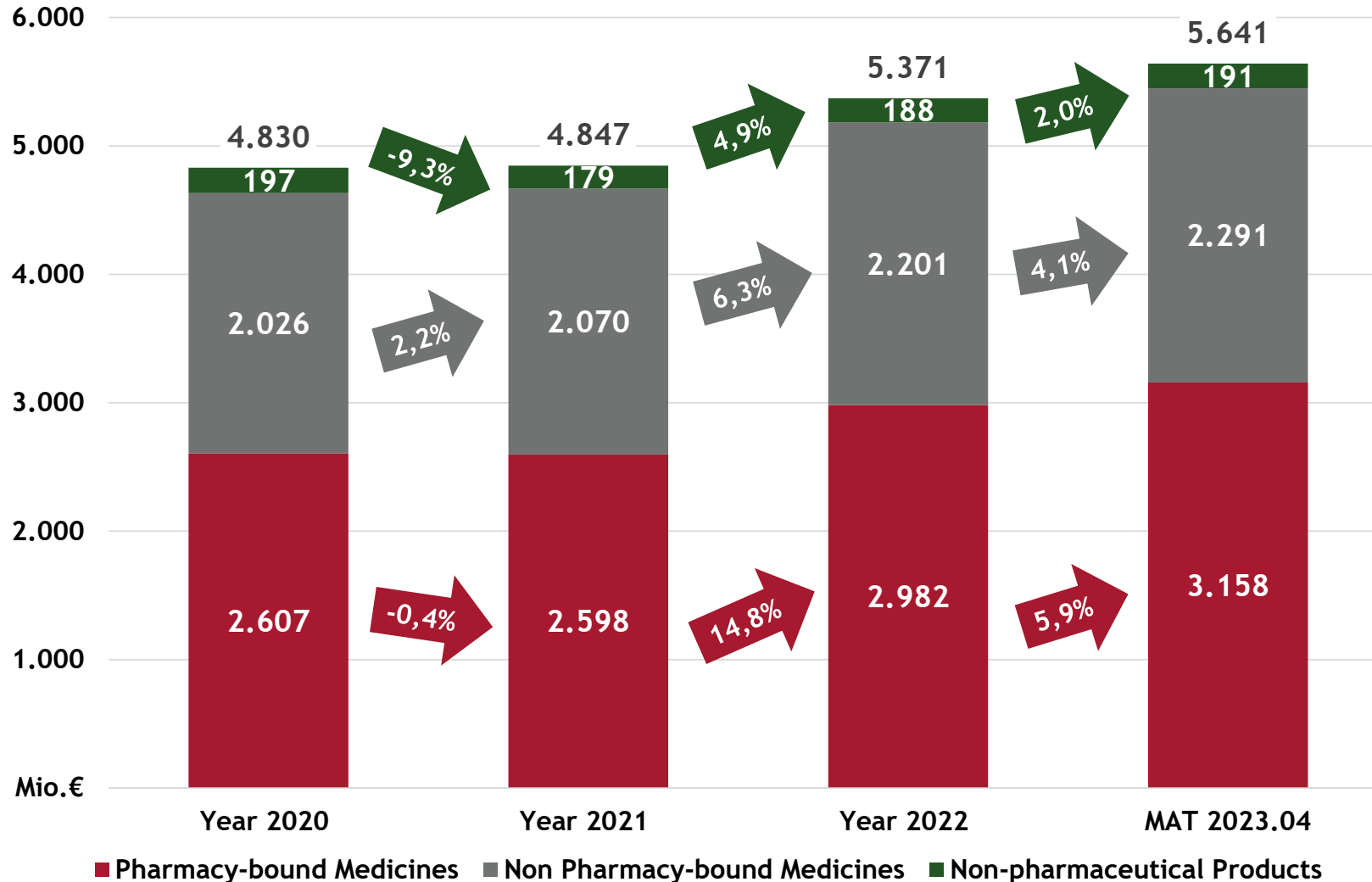
Pharmacy sell-in turnover: wholesale and direct purchases, all available products in pharmacies (full pharmacy assortment),
 Price level: manufacturer selling price (MSP) in m. Euro.
 Source: INSIGHT Health

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



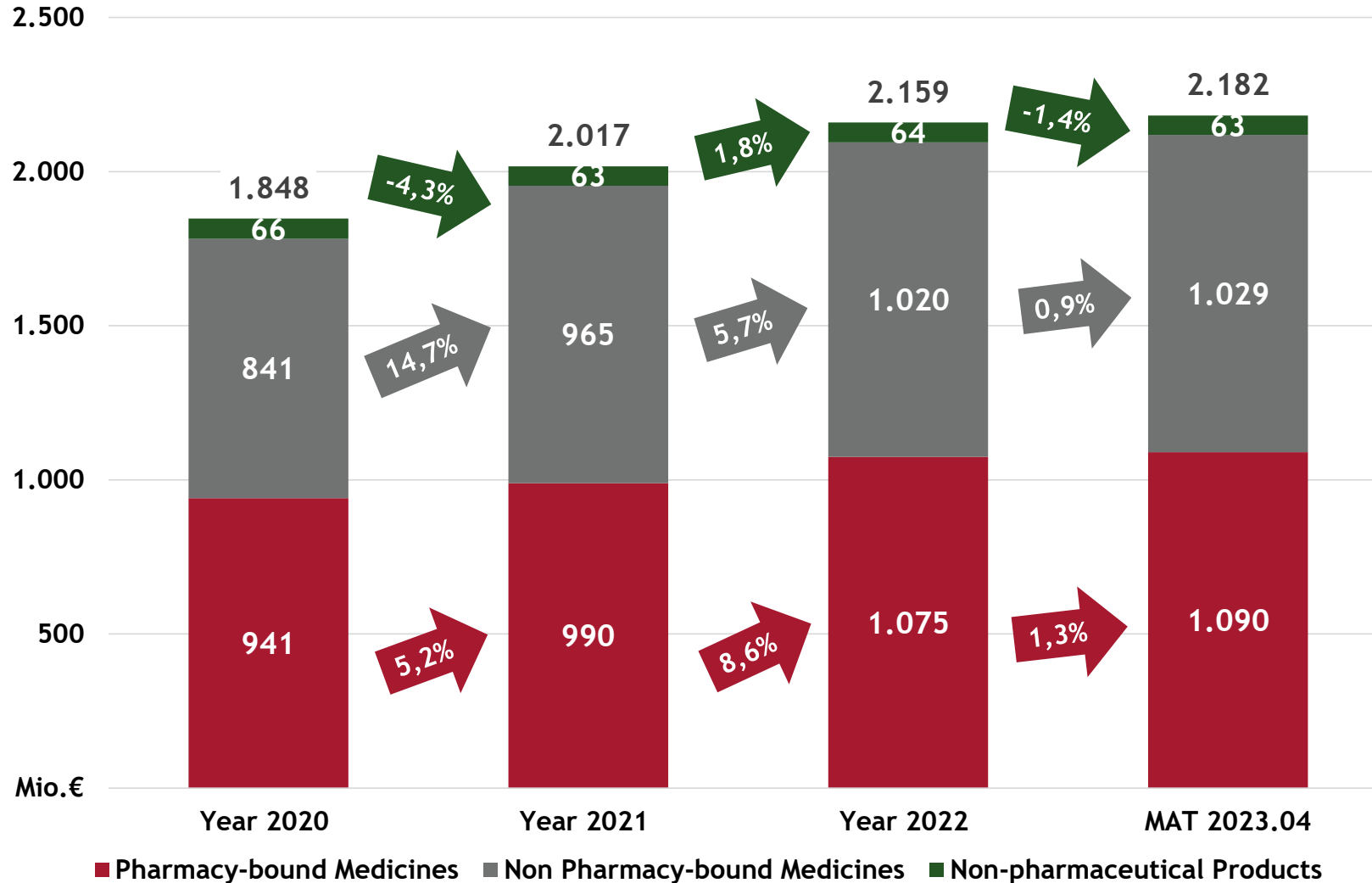
OTC Pharmacy sell-in turnover, *excl. Diagnostics: wholesale and direct purchases, price level MSP in m. Euro.
 Source: APO Channel-Monitor (INSIGHT Health)

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



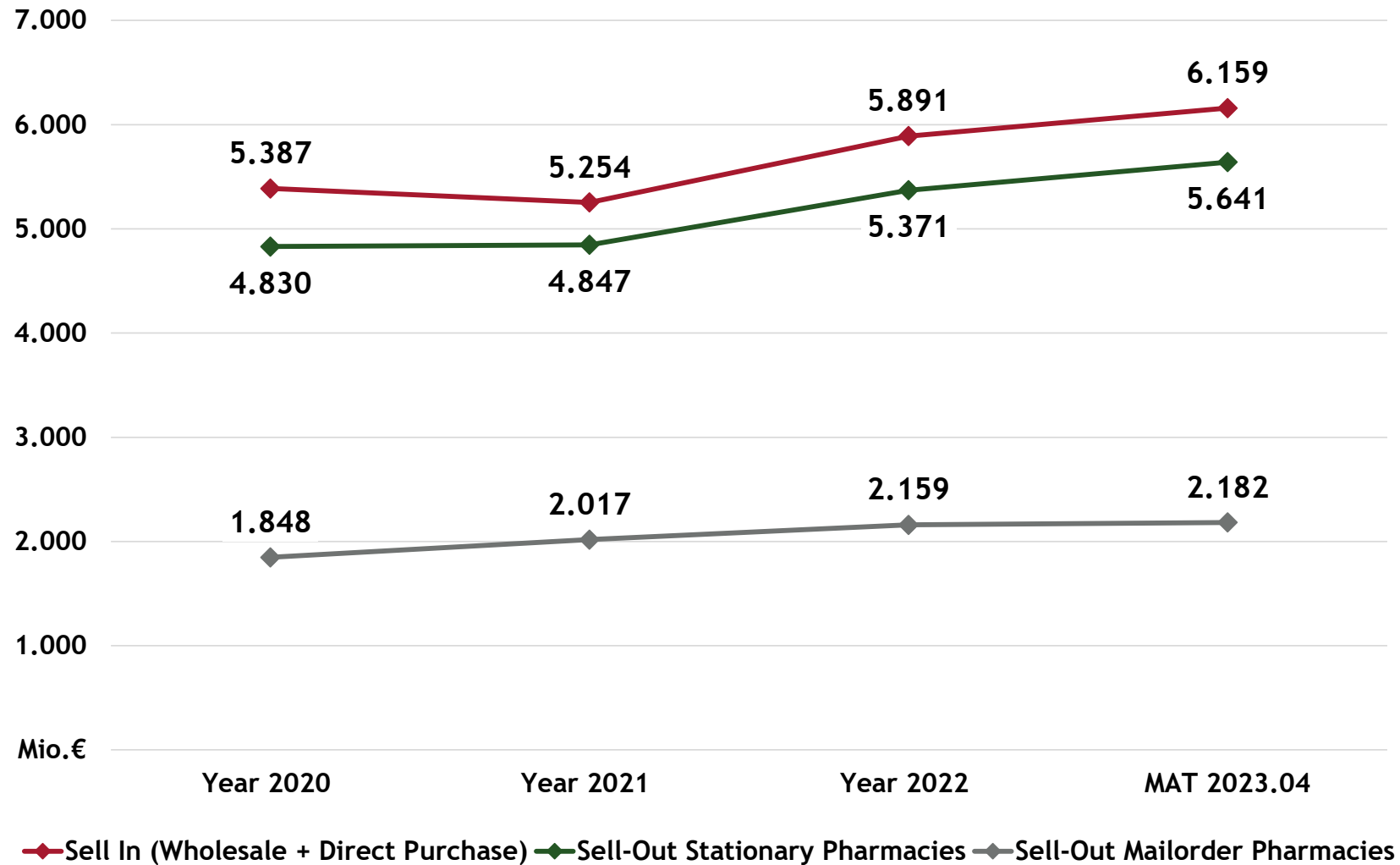
OTC sell-out turnover, *excl. Diagnostics in stationary pharmacies in MSP in m. Euro.
Source: APO Channel-Monitor (INSIGHT Health)

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



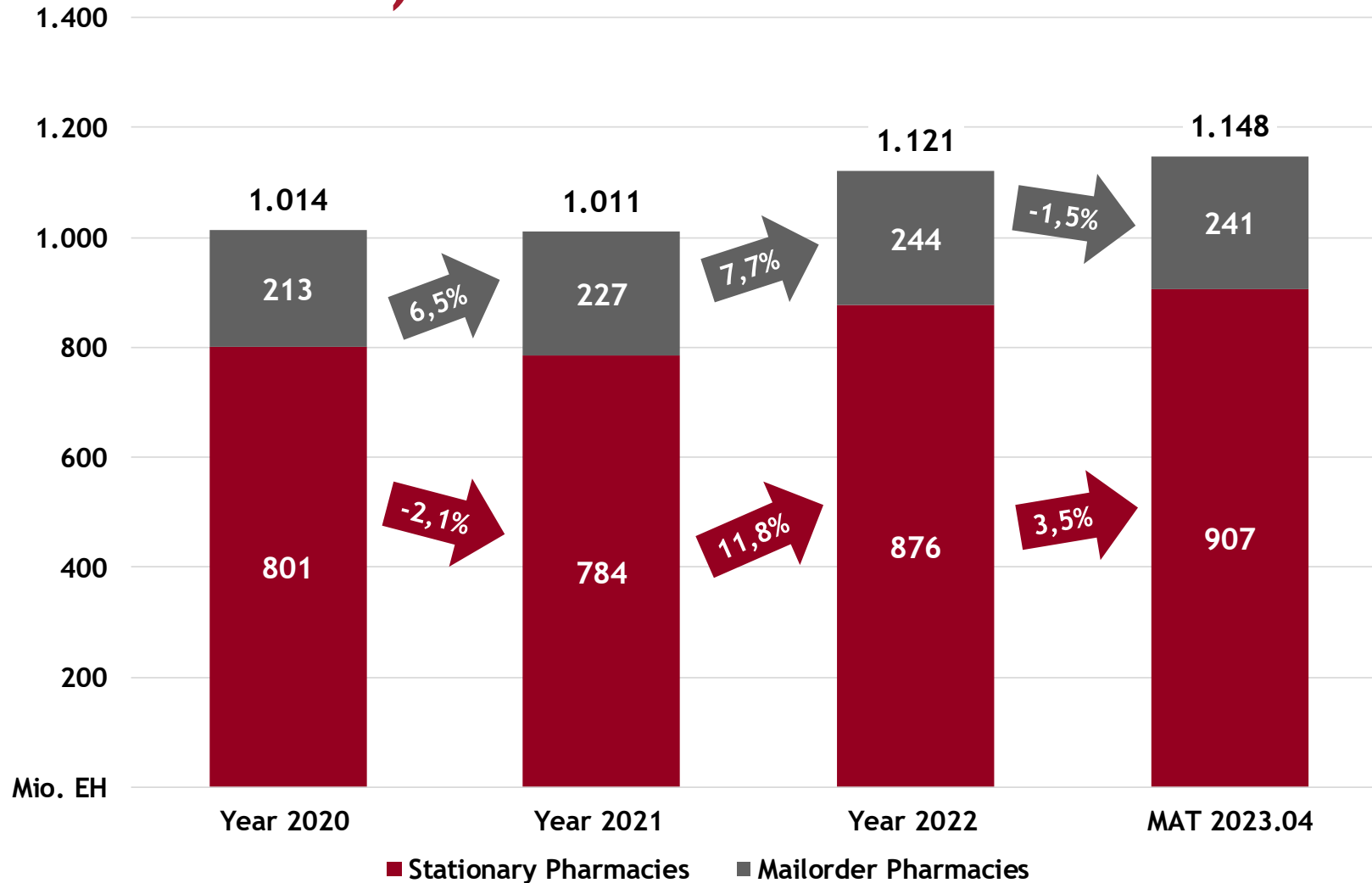
OTC sell-out turnover *excl. Diagnostics, mailorder pharmacies in MSP in m. Euro.
Source: IH APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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



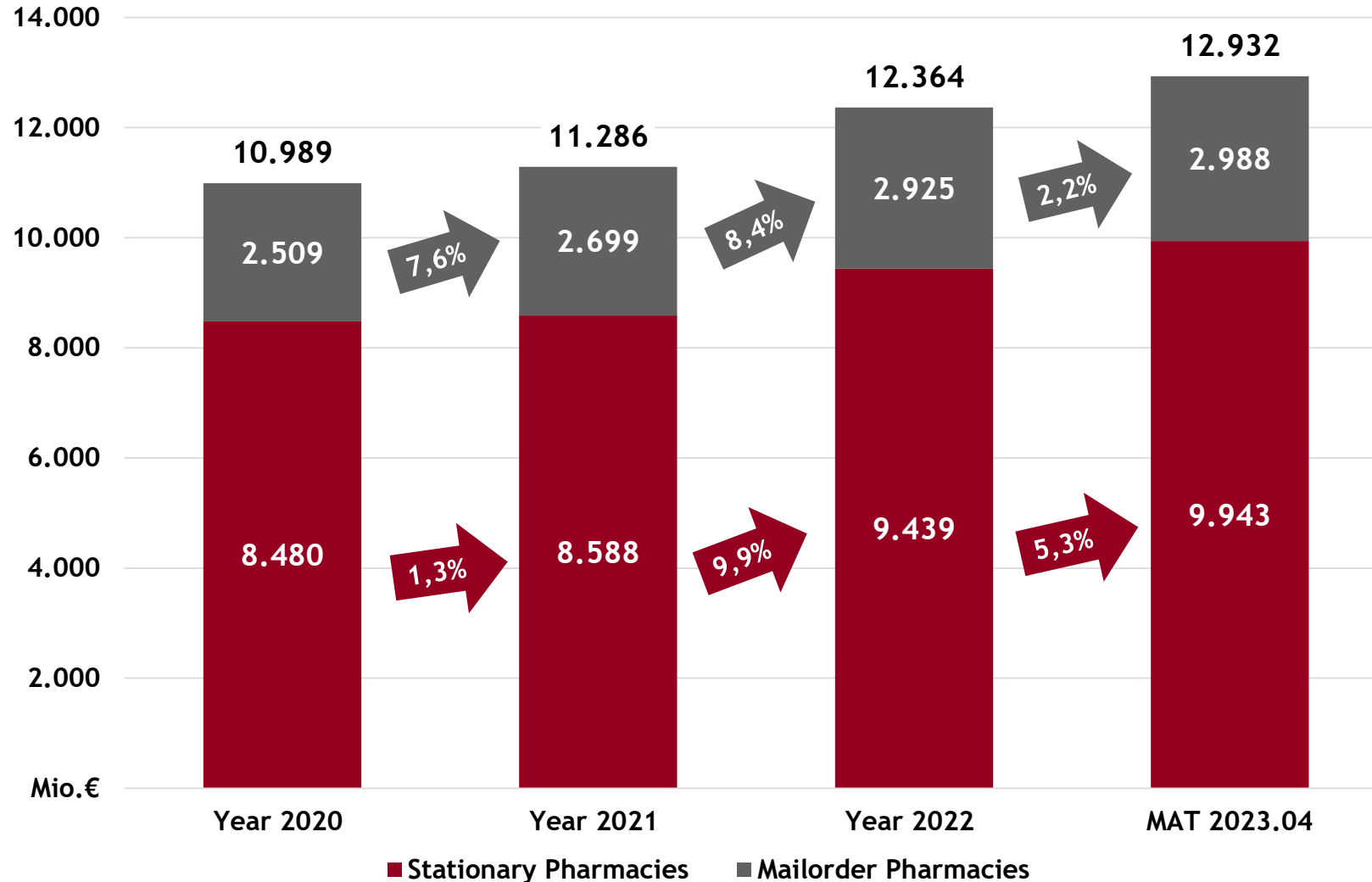
Sell-in and Sell-out in stationary and mailorder pharmacies (excl. mailorder direct sale); *excl. Diagnostics, in m. Euro.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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



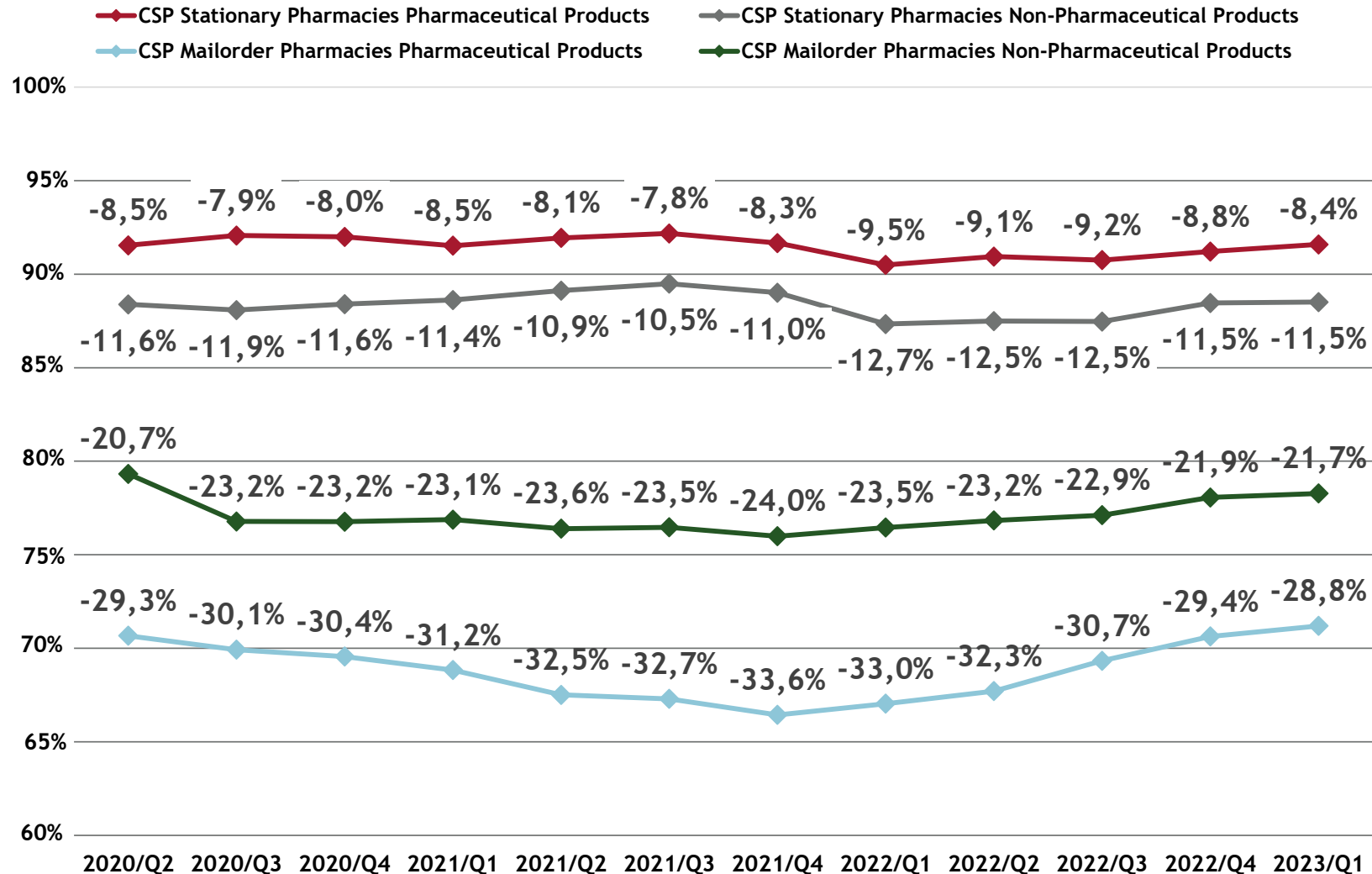
OTC Sell-out *excl. Diagnostics in stationary and mailorder pharmacies in m. units.
Source: APO Channel-Monitor (INSIGHT Health & DatamedIQ)

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 2023.04 rAVP €	△ Mio. €	±%
Top 3 - Stationary Pharmacies			
R05C Expectorants	693,0	284,0	69%
N02B Non-Narcotics And Anti-Pyretics	554,0	78,0	16%
R01A Topical Nasal Preparations	398,0	95,0	31%
Top 3 - Mailorder Pharmacies			
R05C Expectorants	116,0	43,0	60%
N02B Non-Narcotics And Anti-Pyretics	108,0	18,0	20%
R01A Topical Nasal Preparations	103,0	20,0	24%

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

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

	MAT 2023.04 CSP €	△ PY m. €	±% PY
Top 3 - Stationary Pharmacies			
D02J Face Care	246,0	2,0	1,0%
S01K Dry Eye Products	214,0	15,0	7,4%
V06E Enteral Nutrition	209,0	26,0	14,4%
Top 3 - Mailorder Pharmacies			
D02J Face Care	91,0	0,0	0,3%
A12C Other Mineral Supplements	76,0	5,0	6,4%
A07Y Intestinal Health and Immune System Preparations	74,0	11,0	16,9%

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

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

	MAT 2023.04 rAVP €	△ Mio. €	±%
Top 3 - Pharmaceutical Products			
Voltaren Schmerzgel	170,0	-3,0	-2%
Sinupret	158,0	58,0	58%
ACC Akut	86,0	35,0	69%
Top 3 - Non-pharmaceutical Products			
BD Ultra Fine B-D	74,0	-1,0	-1%
Movicol	63,0	-1,0	-2%
Thermacare AI5	50,0	-5,0	-9%

Source: APO Channel-Monitor (INSIGHT Health)

TOP 3 OTC Product Launches (last 12 months ending April 2023)

	MAT 2023.04 CSP €	Launch
Top 3 - OTC-Pharmaceutical Products/Medicines		
Allegra Allergie	2,3	2023_01
Vagisan ProbioFlora	2,0	2022_06
Synofen	1,7	2023_01
Top 3 - Non-Pharmaceutical Products/Medicines		
Orthomol Chondroplus	4,5	2022_09
Dr Theiss Hydro med Blue	3,1	2022_08
Olivenoel Nacht	2,0	2023_01

Source: APO Channel-Monitor (INSIGHT Health)

Contacts for INSIGHT Health OTC-Services:

Dr. Ralf Kettenbach (Senior Client Consultant OTC)

+49 6126 955-431

RKettenbach@insight-health.de

Yannik Dietrich (Productmanager OTC)

+49 6126 955-667

YDietrich@insight-health.de

Simon Kettenbach (Productmanager OTC)

+49 6126 955-437

SKettenbach@insight-health.de

Kevin Schön (Productmanager OTC)

+49 6126 955-433

KSchoen@insight-health.de

OTC@insight-health.de

www.insight-health.de

Kerstin Büttel (Senior Client Consultant OTC)

+49 6126 955-430

KBuettel@insight-health.de

Irmtraud Jox (Sales Director OTC)

+49 162 2790718

IJox@insight-health.de

Nicole Kleist (Productmanager OTC)

+49 6126 955-352

NKleist@insight-health.de

Marvin Wayand (OTC Working Student)

+49 6126 955-412

MWayand@insight-health.de

Contact for DatamedIQ-Services:

Sales Services

+49 221 999895-0

Sales@datamediq.com

www.datamediq.com

INSIGHT Health GmbH

Auf der Lind 10 a/3

65529 Waldems-Esch / Germany

Tel.: +49 6126 955-0

Fax.: +49 6126 955-20

E-Mail: info@insight-health.de



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