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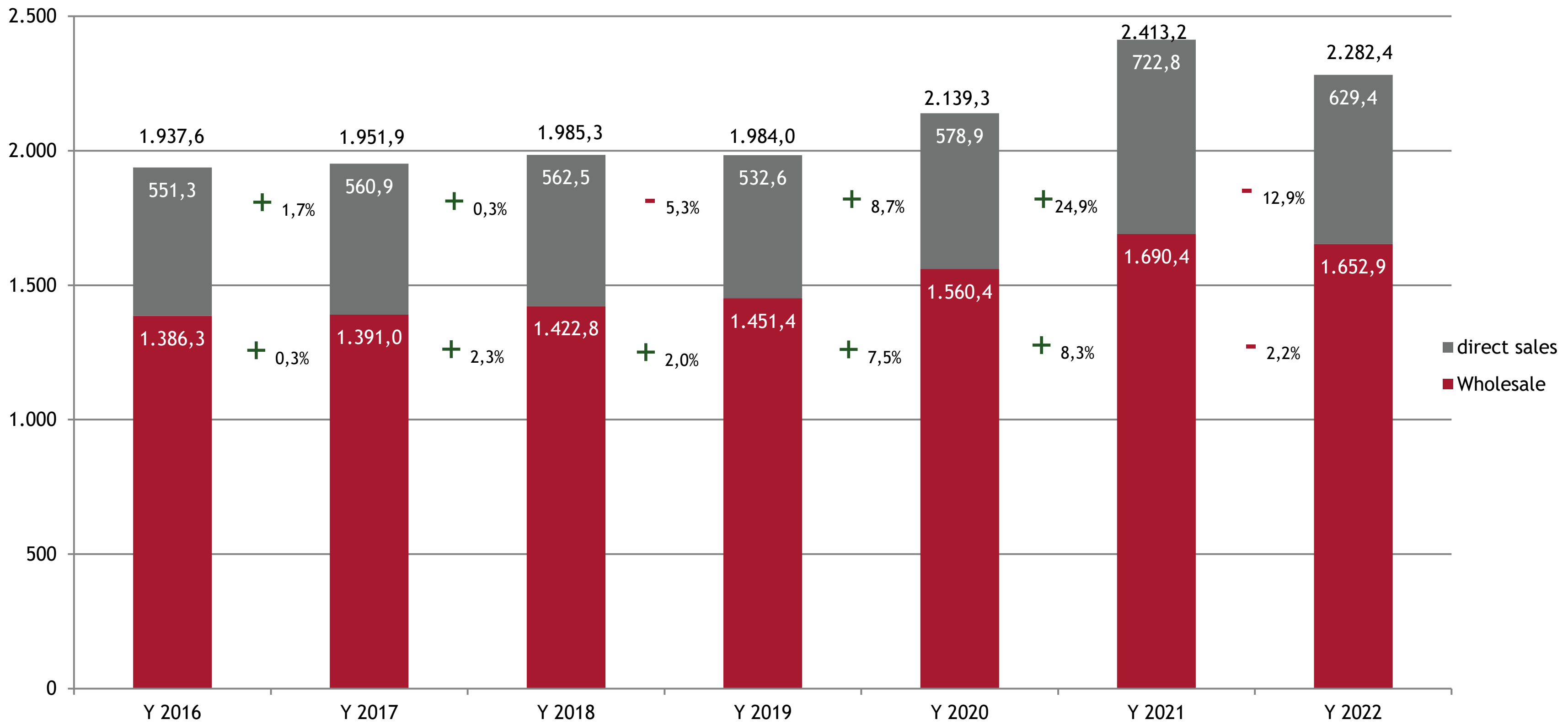
Medical supply market Germany Dezember 2022

Medical supply market development sell-in



Pharmacy sell-in: wholesale and direct sales of medical supplies, purchased in German pharmacies, volume based on manufacturer sales price (MSP) in Mio. € %- growth rate vs. previous year.

Source: INSIGHT Health - NCI – 2022.12

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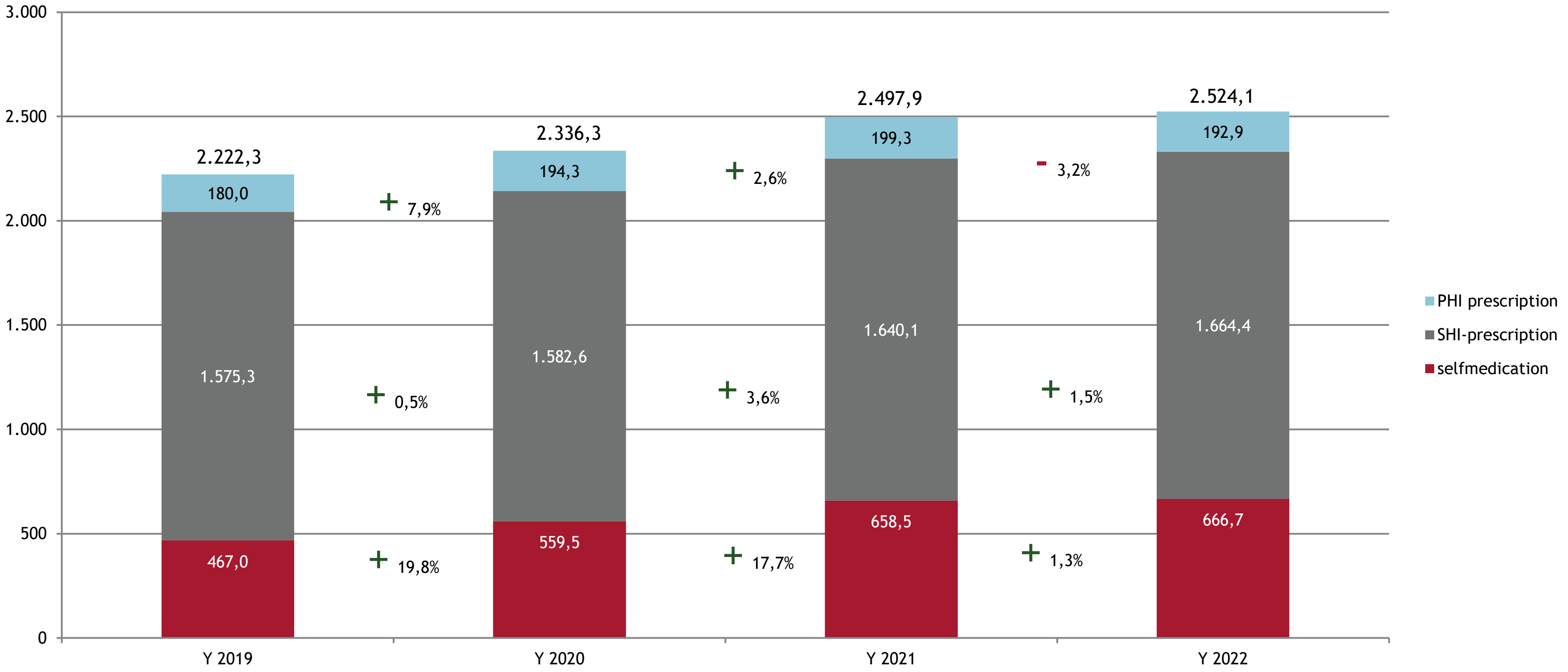
Medical supply market development sell-out



Pharmacy sell-out: sell-out public pharmacies (Germany) of medical supplies, sold in public pharmacies, dispensing distinction by selfmedication, statutory health insurance (SHI) and private health insurance (PHI), volume based on manufacturer sales price (MSP) in Mio. € %-growth rate vs. previous year.

Source: INSIGHT Health – NAV-CI – 2022.12

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Medical supply market in Germany based on sell-in Volume MSP €

Periode	Y 2018		Y 2019		Y 2020		Y 2021		Y 2022	
CIC1	Volume total (MSP) € Mio.	Volume total (MSP)€ '+-' % previous year	Volume total (MSP) € Mio.	Volume total (MSP)€ '+-' % previous year	Volume total (MSP) € Mio.	Volume total (MSP)€ '+-' % previous year	Volume total (MSP) € Mio.	Volume total (MSP)€ '+-' % previous year	Volume total (MSP) € Mio.	Volume total (MSP)€ '+-' % previous year
Summe	**1.985,3**	**1,7%**	**1.984,0**	**-0,1%**	**2.139,3**	**7,8%**	**2.413,2**	**12,8%**	**2.282,4**	**-5,4%**
D Verbandmittel und Pflaster	622,1	7,5%	648,2	4,2%	687,8	6,1%	748,9	8,9%	809,9	8,1%
A Diagnostika	550,5	-6,3%	502,5	-8,7%	501,5	-0,2%	674,3	34,4%	495,4	-26,5%
T Patientenpflege- und Hygienebedarf	220,6	-1,6%	229,4	4,0%	230,0	0,3%	252,9	9,9%	266,1	5,2%
Z Diaetetika und Sondentechnik	157,1	10,3%	165,5	5,3%	173,2	4,7%	184,6	6,6%	199,2	7,9%
E Infus.-, Transfus.-u. Injekts.- Zubehoer	190,3	0,8%	194,1	2,0%	204,7	5,5%	205,9	0,6%	194,4	-5,6%
L Inhalations.- und Anaesthesiebedarf	62,5	2,2%	63,9	2,2%	56,4	-11,8%	60,3	7,0%	79,1	31,2%
R Diagnostikinstrumente u. Therapiegeraete	69,6	6,0%	66,8	-4,0%	82,4	23,3%	75,2	-8,8%	71,9	-4,4%
U Desinfizientia und Seifen	46,8	9,3%	48,8	4,2%	98,7	102,3%	70,2	-28,9%	69,9	-0,4%
P Handschuhe	16,1	9,5%	17,3	7,3%	31,8	84,1%	44,5	40,0%	31,2	-29,8%
F Katheter und Sonden	27,5	-3,6%	26,4	-3,9%	25,8	-2,5%	26,2	1,7%	25,6	-2,2%
S Bekleidung und Waesche	1,9	4,5%	2,0	6,3%	29,7	1387,6%	54,2	82,5%	24,2	-55,3%
X Pessare	19,7	32,2%	18,5	-6,2%	16,6	-10,5%	15,1	-8,7%	14,4	-4,7%
N Wundverschluss-Material	0,6	-0,6%	0,7	14,5%	0,7	4,1%	0,9	19,0%	1,0	9,9%

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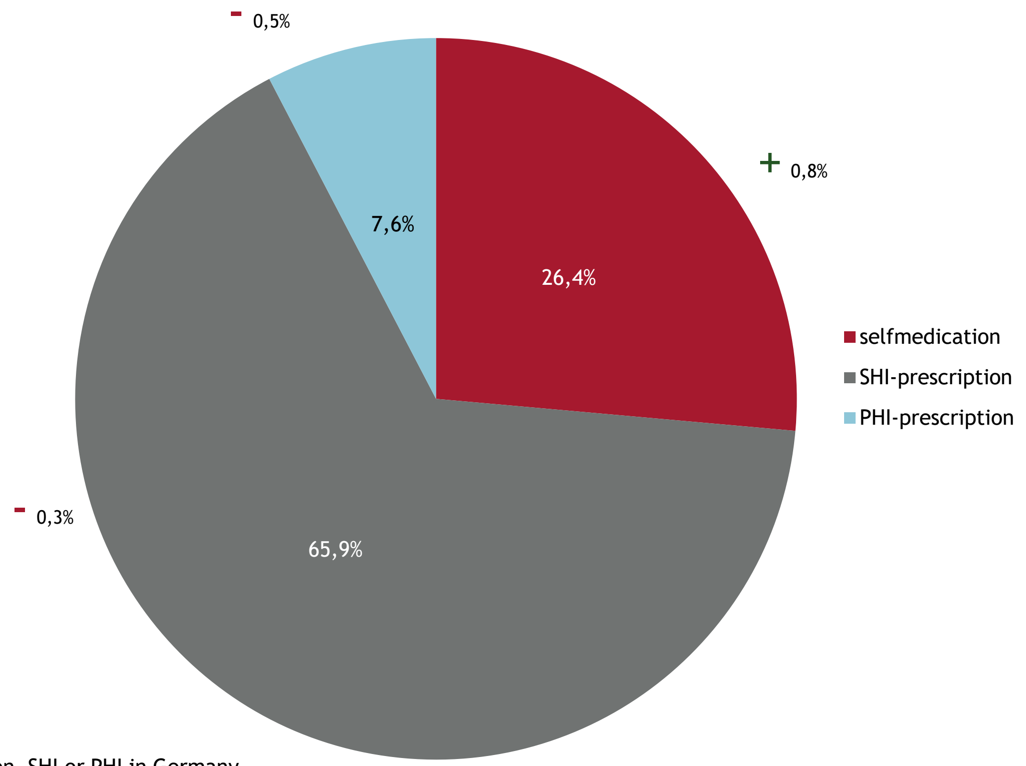
Dispensing distinction by POS Jahr 2022



%-relation sell-out volume (MSP) of selfmedication, SHI or PHI in Germany
%-growth rate vs. previous year.

Source: INSIGHT Health – NAV-CI – 2022.12

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Top3 markets in Germany by dispensing distinction based on sell-out volumes (MSP) € Jahr 2022

Top 3 Marketsegments SHI-prescription		
Market	**Volume MSP €**	**´+/- % PY**
A02B1 Blutzuckertests	284.971.427	-15,4%
D04B4 Schaumstoffverbaende	155.153.089	12,4%
E07B0 Pennadeln	126.404.189	-1,7%

Top 3 Marketsegments selfmedication		
Market	**Volume MSP €**	**´+/- % PY**
A02X0 Andere Testdiagnostika	71.651.949	11,3%
T10A0 Cold-Hot Packungen	38.192.186	-8,2%
A02B1 Blutzuckertests	35.870.828	-18,5%

Top 3 Marketsegments PHI-prescription		
Market	**Volume MSP €**	**´+/- % PY**
A02B1 Blutzuckertests	21.278.999	-15,6%
D04B4 Schaumstoffverbaende	14.374.692	14,0%
X02A0 Kontrazeptiva	9.944.115	-8,5%

Source: INSIGHT Health – NAV-CI – 2022.12

Top3 markets in Germany by dispensing distinction based on sell-out values (counting units) Jahr 2022

Top 3 Marketsegments SHI-prescription		
Market	**Value (CU)**	**´+/- % PY**
A02B1 Blutzuckertests	785.860.884	-14,4%
E07B0 Pennadeln	633.706.748	-1,6%
R01C2 Lanzetten	202.316.442	-6,2%
Top 3 Marketsegments selfmedication		
Market	**Value (CU)**	**´+/- % PY**
D03A1 Mullkompressen unsteril	125.853.437	3,0%
A02B1 Blutzuckertests	99.296.920	-17,6%
D03B5 Sonstige Tupfer	95.865.754	-4,3%
Top 3 Marketsegments PHI-prescription		
Market	**Value (CU)**	**´+/- % PY**
A02B1 Blutzuckertests	57.145.861	-14,6%
E07B0 Pennadeln	42.684.672	1,5%
R01C2 Lanzetten	15.439.896	-6,8%

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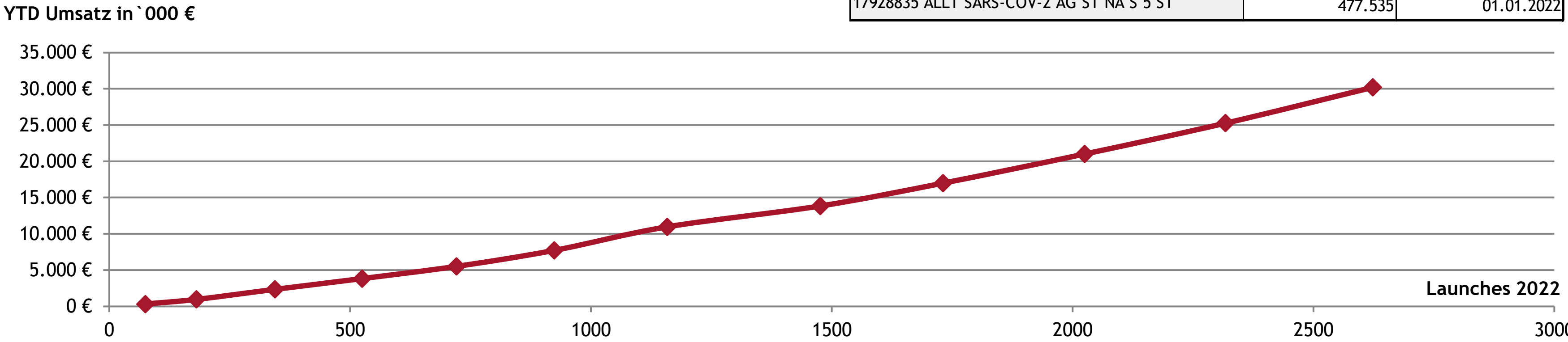
Medical supply - product launches 2022

15.137 SKUs were already launched in 2022 in Germany. 2.623 SKUs are already distributed in public pharmacies.

All launches togehter are generating € 30.200.328 based on MSP (YTD 2022.12).

The Top 10 SKUs are shown.

Top 10 Productlaunches of 2022		
SKU	YTD 2022.12	
Sum of all Launches	**30.200.286**	**date of launch**
17979548 SEJOY SARS COV2 AG RAPID 1 ST	1.898.774	01.02.2022
17931524 FFP2 AIR QUEEN BREEZE MASK 1 ST	1.132.536	01.02.2022
17955341 OMRON M3 COMFORT OBERA BMG 1 ST	1.126.617	01.02.2022
17979531 SEJOY SARS COV2 AG RAPID 5 ST	1.017.665	01.02.2022
17823266 APONORM INHAL COMP PLUS 1 ST	999.288	01.01.2022
16901231 URGOK1 KOM SYS10CM KU25-32 6 ST	910.284	15.02.2022
18132972 AIR EASE FFP2 NANOFILT MAS 1 ST	790.275	01.06.2022
16901219 URGOK1 KOM SYS10CM KU18-25 6 ST	678.978	15.02.2022
17935367 LITUO COVID-19 AG NACHWEIS 1 ST	614.692	01.01.2022
17928835 ALLT SARS-COV-2 AG ST NA S 5 ST	477.535	01.01.2022



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