Insight Health
OTC-Scanner Pharmacy – Germany

1st Quarter 2025

INSIGHT HEALTH

Insight Health OTC Scanner (DE)

- Local Pharmacy by Insight Health and Online Pharmacy by DatamedIQ (OTC, overview)
- Total sales from German pharmacies: "Therapeutic Assortment" including cosmetics, nutrition
- Over-The-Counter (OTC – local & online pharmacy) and prescription (Rx – only local pharmacy)

OTC market:

- Sales by prescription/cash sale
- Leading OTC & Personal Care (PC) Categories
- Leading OTC & personal care (PC) manufacturers and brands (local pharmacy)
- Dynamics of the leading manufacturers and Brands (local pharmacy)
- New preparations (SKU) of the current year (local pharmacy)
- Season Charts: Cough & Cold (Q4 + Q1), Allergy (Q2), Sun Protection (Q3)

OTC: "Therapeutic Assortment" consisting of: IH-OTC and IH-Personal Care (PC), category and subcategory assignments on request

Source: IH APO Fusion Germany, sales in units and rated with CSP (consumer selling price/consumer price including VAT; for RX = public price) Update: quarterly

German Pharmacy Market: Therapeutic Assortment (RX & OTC) (MAT)

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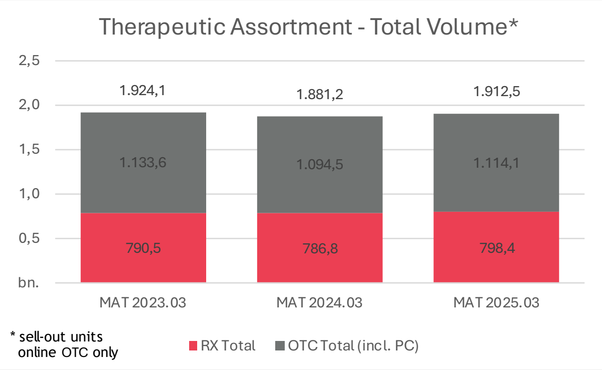
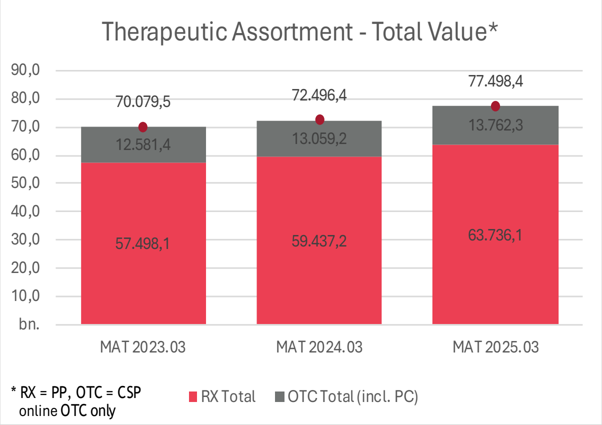
	±% YA	±% VVJ	±% CAGR
Value development	**6,9%**	**3,4%**	**5,2%**
Rx Total	7,2%	3,4%	5,3%
OTC Total (incl. PC)	5,4%	3,8%	4,6%





	±% YA	±% 2YA	±% CAGR
Volume development	**1,7%**	**-2,2%**	**-0,3%**
Rx Total	1,5%	-0,5%	0,5%
OTC Total (incl. PC)	1,8%	-3,4%	-0,9%

Source: IH APO-Monitor 2025

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German Pharmacy Market: RX & OTC – Local & Online Pharmacy (MAT)

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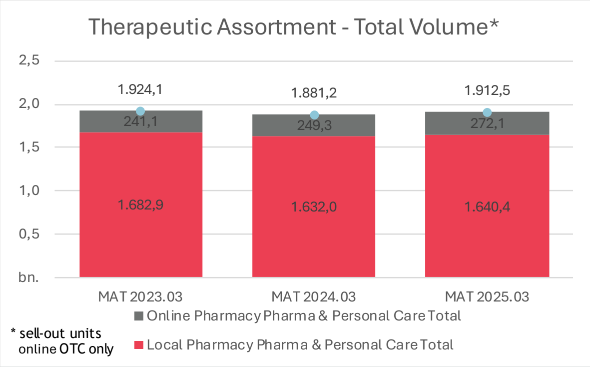
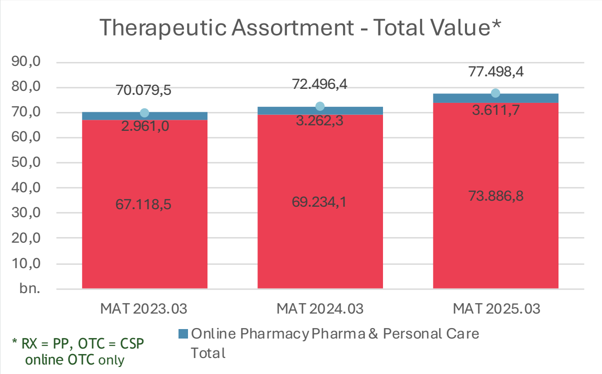
	±% YA	±% 2YA	±% CAGR
Value development	**6,9%**	**3,4%**	**5,2%**
Local Pharmacy	6,7%	3,2%	**4,9%**
Online Pharmacy	10,7%	10,2%	10,4%





	±% YA	±% 2YA	±% CAGR
Volume development	**1,7%**	**-2,2%**	**-0,3%**
Local Pharmacy	0,5%	-3,0%	**-1,3%**
Online Pharmacy	9,2%	3,4%	6,2%

Source: IH APO-Monitor 2025

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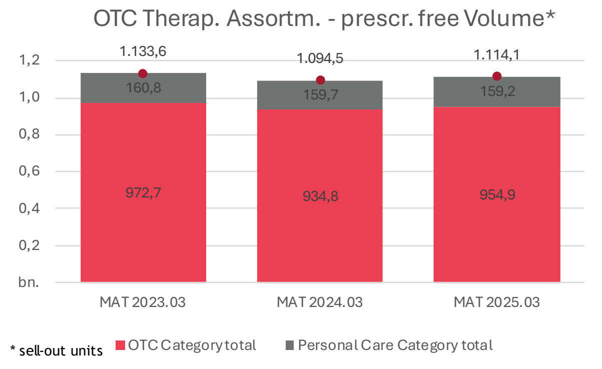
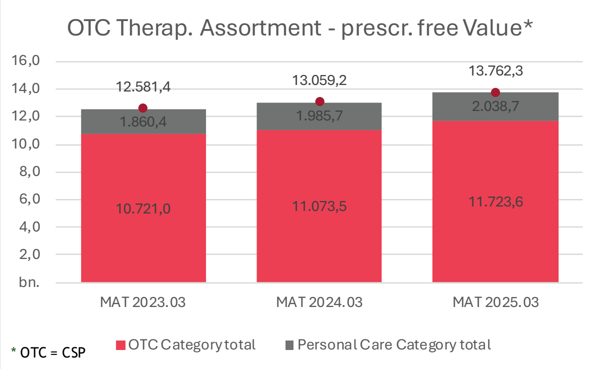
German OTC Pharmacy Market: OTC & Personal Care (MAT)

	±% YA	±% VVJ	±% CAGR
Value Development	**5,4%**	**3,8%**	**4,6%**
OTC Category Total	5,9%	3,3%	4,6%
Personal Care Category Total	2,7%	6,7%	4,7%



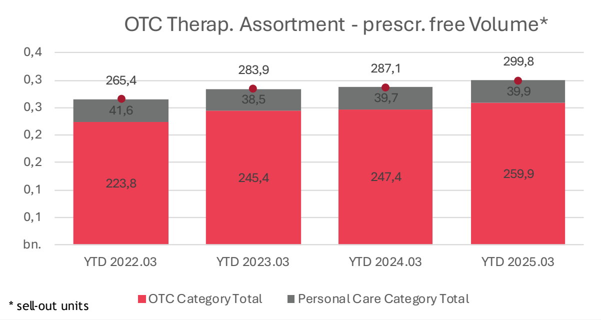


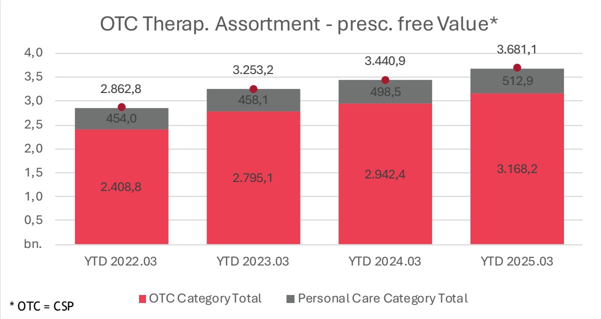
	±% YA	±% 2YA	±% CAGR
Volume Development	**1,8%**	**-3,4%**	**-0,9%**
OTC Category Total	2,2%	-3,9%	-0,9%
Personal Care Category Total	-0,3%	-0,7%	-0,5%

Source: IH APO-Monitor 2025

German OTC Pharmacy Market:
OTC & Personal Care (YTD)

	±% YA	±% 2YA	±% 3YA	±% CAGR
Value Development	**7,0%**	**5,8%**	**13,6%**	**8,7%**
OTC Category Total	7,7%	5,3%	16,0%	9,6%
Personal Care Category Total	2,9%	8,8%	0,9%	4,2%





	±% YA	±% 2YA	±% 3YA	±% CAGR
Volume devlopment	**4,4%**	**1,1%**	**7,0%**	**4,1%**
OTC Category Total	5,0%	0,8%	9,6%	5,1%
Personal Care Category Total	0,6%	3,0%	-7,4%	-1,4%

Source: IH APO-Monitor 2025

German OTC Pharmacy Market:
OTC & Personal Care – Local & Online Pharmacy (MAT)

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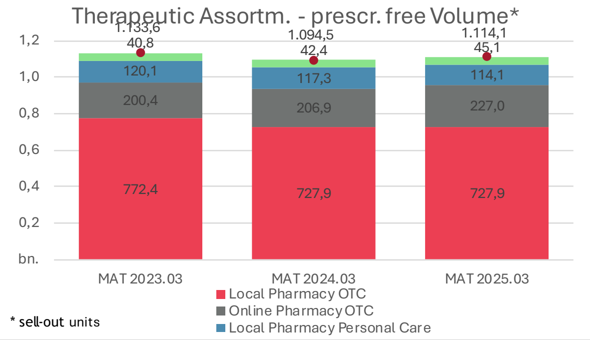
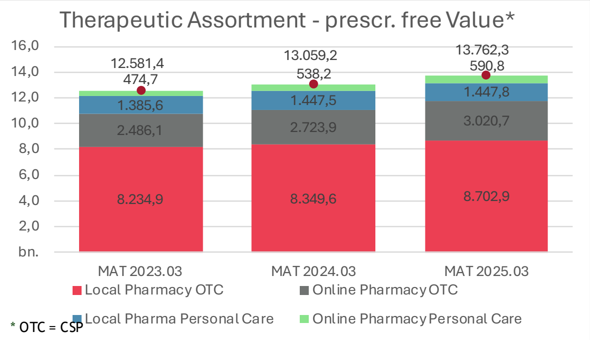


	±% YA	±% VVJ	±% CAGR
Value Development	**5,4%**	**3,8%**	**4,6%**
Local Pharmacy OTC	4,2%	1,4%	2,8%
Online Pharmacy OTC	10,9%	9,6%	10,2%
Local Pharmacy Personal Care	0,0%	4,5%	2,2%
Online Pharmacy Personal Care	9,8%	13,4%	11,6%



	±% YA	±% 2YA	±% CAGR
Volume development	**1,8%**	**-3,4%**	**-0,9%**
Local Pharmacy OTC	0,0%	-5,8%	-2,9%
Online Pharmacy OTC	9,7%	3,2%	6,4%
Local Pharmacy Personal Care	-2,8%	-2,3%	-2,5%
Online Pharmacy Personal Care	6,5%	4,0%	5,2%

Source: IH APO-Monitor 2025

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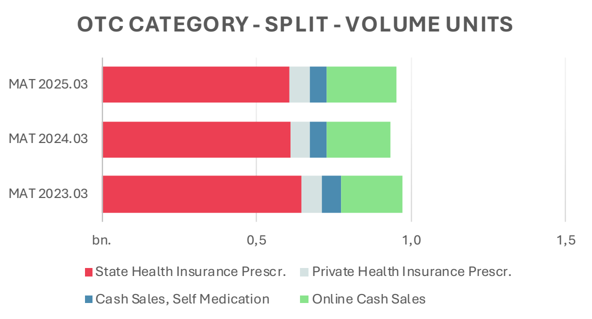
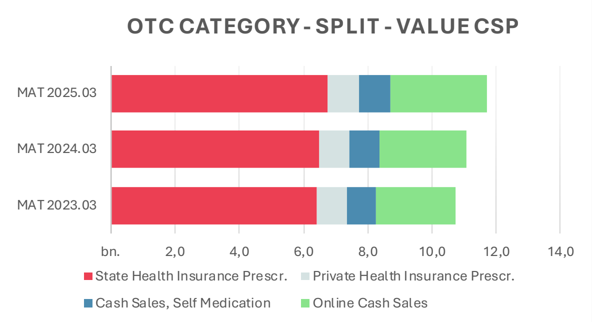
OTC Category* by Kind of Sale (at Point of Sale) (MAT)



Sales Value Development	±% YA	±% 2YA	±% CAGR
OTC Category	**5,9%**	**3,3%**	**4,6%**
State Health Insurance Prescr.	4,1%	1,2%	2,6%
Private Health Insurance Prescr.	3,9%	1,2%	2,5%
Cash Sales, Self Medication	5,3%	3,1%	4,2%
Online Cash Sales	10,9%	9,6%	10,2%



Sales Volume Development	±% YA	±% 2YA	±% CAGR
OTC Category	**2,2%**	**-3,9%**	**-0,9%**
State Health Insurance Prescr.	-0,2%	-5,6%	-2,9%
Private Health Insurance Prescr.	1,5%	-4,6%	-1,6%
Cash Sales, Self Medication	0,1%	-8,3%	-4,2%
Online Cash Sales	9,7%	3,2%	6,4%

Source: IH APO-Monitor 2025

*excl. Personal Care (PC), Private Health Insurance incl. Green Prescriptions

OTC Category – German Pharmacy Total (MAT)

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Sales Value in Consumer Prices (mil.)	MAT 2025.03 Pharmacy Total	±% CAGR vs. 2YA	Online Pharmacy Share
OTC Category - Leading Subcategories	**11.723,6**	**4,6%**	**26%**
Cough & Cold	2.438,9	3,1%	19%
Digestion	1.601,3	6,9%	26%
Vitamins & Minerals	1.542,5	5,0%	32%
Analgesics (excl. M)	851,3	2,8%	20%
Skin, Hair & Nails	746,3	5,7%	33%
Muscles & Joints (incl. Pain)	701,4	3,0%	29%
Cardiovascular Remedies & Cholesterol	497,7	3,3%	42%
Urogenital agents (bladder, prostate, hormones, etc.)	487,3	6,1%	29%
Miscellanea	461,9	5,5%	19%
Eye Preparations	439,0	6,6%	25%
Nutrients	349,9	9,0%	9%
Calm & Sleep	340,4	3,2%	29%
Allergy	328,6	11,6%	22%
Homeopathy and Panacea	238,8	-2,4%	38%
Oral & Dental Care	203,1	4,7%	19%

Source: IH APO-Fusion OTC, OTC Subcategories

The OTC categories in total achieved a turnover of € 11.7 billion at retail prices in the 12 rolling months period (MAT) ending March 2025. The compound annual growth rate (CAGR vs. 2 years ago) is 4.6 %.
The highest growth was achieved by subcategories Allergy, Nutrients, Digestion (excl. M) and Eye Preparations. The average share of online pharmacies is
26 %.
Categories that address less acute complaints achieve above average online shares.
Only Homeopathy and Panacea showed a decline.

Personal Care Category – German Pharmacy Total (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.03 Pharmacy Total	±% CAGR vs. 2YA	Online Pharmacy Share
Personal Care Category - Leading Subcategories	**2.038,7**	**4,7%**	**29%**
Face Clean & Care	545,2	4,0%	31%
Body Clean & Care	403,2	3,6%	31%
Other Skin Preparations	307,3	5,4%	26%
Wound Healing	274,2	6,3%	23%
Sun Protection	136,8	9,5%	31%
Hair Care	79,3	12,5%	37%
Intimate Care	69,0	10,3%	33%
Oral Hygiene	67,0	0,4%	35%
Miscellanea	50,3	5,2%	17%
Foot Care	49,9	-4,2%	26%
Children & Baby Care	26,5	-3,4%	22%
Decorative Cosmetics	23,4	-5,3%	30%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total achieved sales of € 2 billion at retail prices in the 12 rolling months period (MAT) ending March 2025. The compound annual growth rate (CAGR vs. 2 years ago) is 4.7 %.
Nine categories achieved growth and six were growing above-average, especially Hair Care. Decorative Cosmetics, Children & Baby Care and Foot Care are still showing declines.
The average share of online pharmacies is 29 %.
Seven categories achieve an above-average online share.

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OTC Category – German Pharmacy Total (YTD)

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Sales Value in Consumer Prices (mil.)	YTD 2025.03 Pharmacy Total	±% CAGR vs. 3YA	Online Pharmacy Share
OTC Categories - Leading Subcategories	**3.168,2**	**9,6%**	**26%**
Cough & Cold	782,2	23,6%	19%
Digestion	418,0	8,9%	27%
Vitamins & Minerals	415,5	6,4%	33%
Analgesics (excl. M)	229,0	8,2%	20%
Skin, Hair & Nails	171,6	4,9%	36%
Muscles & Joints (incl. Pain)	177,6	1,9%	30%
Cardiovascular Remedies & Cholesterol	126,5	3,7%	44%
Urogenital agents (bladder, prostate, hormones, etc.)	122,0	6,8%	31%
Miscellanea	107,6	4,1%	20%
Eye Preparations	112,1	6,7%	26%
Nutrients	88,0	10,2%	9%
Calm & Sleep	89,1	2,1%	31%
Allergy	87,2	14,0%	25%
Homeopathy and Panacea	61,2	-0,6%	39%
Oral & Dental Care	52,5	6,1%	21%

Source: IH APO-Fusion OTC, OTC Subcategories

The OTC categories in total achieved a turnover of € 3.2 billion at retail prices in the January to March 2025 period. The compound annual growth rate (YTD-CAGR vs. 3 years ago) is 9.6 %.

14 of the leading OTC Categories achieved growth, only one declined slightly. The highest growth was achieved by Cough & Cold remedies, Allergy and Nutrients.

The average share of online pharmacies is 26%. Categories that address less acute complaints achieve above average online shares.

Personal Care Category – German Pharmacy Total (YTD)

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Sales Value in Consumer Prices (mil.)	YTD 2025.03 Pharmacy Total	±% CAGR vs. 3YA	Online Pharmacy Share
Personal Care Category - Leading Subcategories	512,9	4,2%	31%
Face Clean & Care	142,2	4,4%	34%
Body Clean & Care	108,5	2,6%	33%
Other Skin Preparations	77,2	3,4%	27%
Wound Healing	69,0	6,2%	24%
Sun Protection	25,3	15,6%	36%
Hair Care	21,4	11,3%	39%
Intimate Care	17,0	7,9%	34%
Oral Hygiene	16,8	-0,7%	37%
Miscellanea	9,1	0,2%	19%
Foot Care	11,8	-3,2%	29%
Children & Baby Care	7,2	-4,3%	24%
Decorative Cosmetics	6,0	-2,8%	34%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total achieved sales of € 513 Mio. at retail prices in the January to March 2025 period. The compound annual growth rate (YTD-CAGR vs. 3 years ago) is 4.2 %.
Eight categories achieved growth, especially Sun Protection.
Children & Baby Care, Foot Care, Decorative Cosmetics and Oral Hygiene are still showing declines.
The average share of online pharmacies is 31 %.
Five categories achieve an above-average online share.

OTC Category – Local & Online Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA	MAT 2025.03 Online Pharmacy	±% CAGR vs. 2YA
OTC Category - Leading Subcategories	**8.702,9**	**2,8%**	**3.020,7**	**10,2%**
Cough & Cold	1.968,4	1,2%	470,5	12,7%
Digestion	1.191,2	4,7%	410,1	14,4%
Vitamins & Minerals	1.051,2	3,3%	491,3	9,0%
Analgesics (excl. M)	680,5	1,8%	170,7	7,3%
Skin, Hair & Nails	498,5	3,3%	247,8	11,2%
Muscles & Joints (incl. Pain)	498,4	1,7%	203,0	6,5%
Miscellanea	373,3	4,5%	88,6	10,2%
Urogenital agents (bladder, prostate, hormones, etc.)	345,7	4,5%	141,7	10,6%
Eye Preparations	331,0	5,2%	108,0	11,1%
Nutrients	317,6	8,6%	32,3	12,8%
Cardiovascular Remedies & Cholesterol	290,5	-0,1%	207,2	8,8%
Allergy	256,3	10,4%	72,3	16,3%
Calm & Sleep	241,3	2,0%	99,0	6,3%
Oral & Dental Care	164,1	3,1%	38,9	12,5%
Homeopathy and Panacea	149,0	-5,3%	89,8	2,9%

Source: IH APO-Fusion OTC, OTC Subcategories

The OTC categories in total grew in the MAT March 2025 in local pharmacies with € 8.7 billion at retail prices and 2.8% (CAGR vs. VVJ), while the online sales grew by 10.2% to € 3 billion.
Allergies are showing extraordinary growth, not only in local pharmacies, while Oral & Dental Care grew only slightly above market growth in the local pharmacy.

Only two categories show a decrease. Online sales again show dynamic growth. In the mail order business, eight categories are growing well above average.

Personal Care Category – Local & Online Pharmacy (MAT)

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Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA	MAT 2025.03 Online Pharmacy	±% CAGR vs. 2YA
Personal Care Category - Leading Subcategories	**1.447,8**	**2,2%**	**590,8**	**11,6%**
Face Clean & Care	376,5	0,9%	168,6	12,0%
Body Clean & Care	277,3	1,6%	125,9	8,3%
Other Skin Preparations	228,3	2,8%	79,0	13,8%
Wound Healing	210,6	3,8%	63,6	16,3%
Sun Protection	94,5	7,0%	42,3	15,7%
Hair Care	50,2	8,5%	29,1	20,5%
Intimate Care	46,4	8,7%	22,6	13,9%
Oral Hygiene	43,8	-2,1%	23,2	5,6%
Miscellanea	41,9	4,6%	8,4	8,1%
Foot Care	37,2	-4,5%	12,7	-3,2%
Children & Baby Care	20,7	-3,8%	5,8	-2,1%
Decorative Cosmetics	16,4	-9,6%	7,0	7,9%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total are growing in the MAT March 2025 in local pharmacies by 2.2% (CAGR vs. VVJ) and reach € 1.45 billion at retail price. Online sales grew more dynamically at 11.6% (CAGR vs. VVJ).

Above all, intimate care, hair care and sun protection products show above-average growth in local pharmacies.

Decorative cosmetics, foot care and children & baby care lose particularly strongly.

Six categories show above-average online growth, especially hair care.

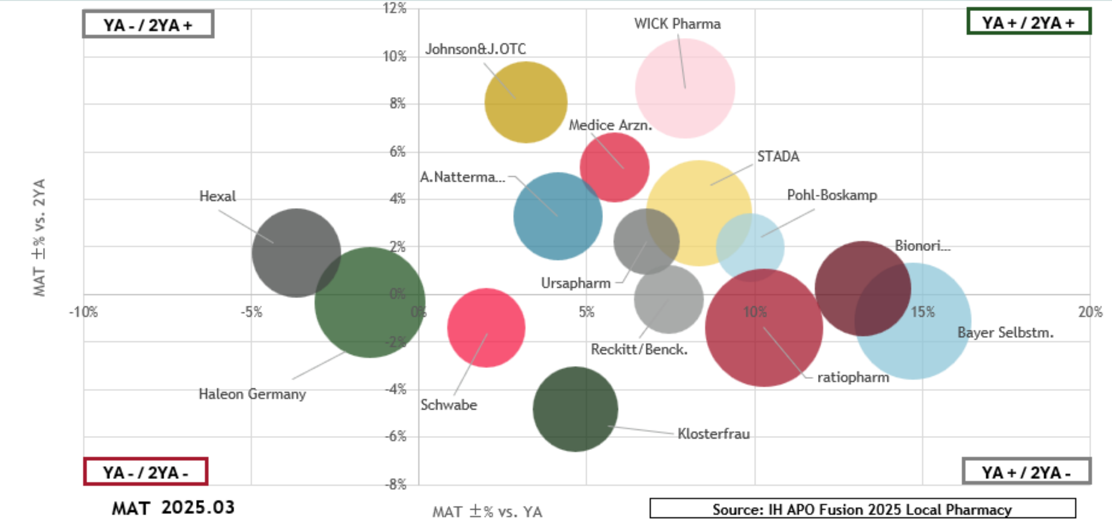
OTC Top Manufacturers – Local Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA
OTC Category - Top Manufacturers	**8.702,9**	**2,8%**
ratiopharm	430,7	1,8%
Bayer Selbstm.	401,5	2,6%
Haleon Germany	384,6	-1,9%
STADA	367,3	4,3%
Bionorica	315,4	4,6%
WICK Pharma	302,3	6,2%
A.Nattermann	268,8	3,1%
Hexal	245,0	-2,0%
Klosterfrau	236,0	-2,0%
Johnson&J.OTC	182,7	2,1%
Schwabe	166,2	-1,0%
Medice Arzn.	164,4	5,0%
Reckitt/Benck.	161,9	-0,5%
Pohl-Boskamp	155,3	4,6%
Ursapharm	143,2	3,6%

Source: IH APO-Fusion OTC, OTC Subcategories

Of the 15 leading OTC manufacturers, 10 show growth (CAGR vs. 2 years ago) in local pharmacies: most notably the manufacturers with cough & cold products, like Wick Pharma, Medice,Pohl-Boskamp, Bionorica, and Stada.
Of the all the 15 manufacturers, 5 were showing a decline (CAGR vs. 2YA).

Dynamics Top OTC Manufacturers (Local Pharmacy) (MAT)



Interpretation example:
Pohl-Boskamp performed very positively in the current MAT but not in the previous year's MAT → bottom right quadrant

Personal Care Top Manufacturers – Local Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA
Personal Care Categories - Top Manufacturers	**1.447,8**	**2,2%**
Beiersd.Eucer.	152,3	4,2%
Roche Posay	137,7	6,4%
Bayer Selbstm.	100,0	2,5%
Pierre F.DermoK	75,4	-0,1%
Dr.August Wolff	61,1	3,2%
SCHÜLKE & MAYR	59,3	8,8%
Vichy	53,7	-6,0%
Theiss	51,2	-1,0%
Medicos Kosm.	43,4	15,3%
CeraVe	31,8	22,5%
Galderma Labor.	31,4	-2,3%
Hartmann	27,2	-3,7%
Hermes	23,3	0,5%
Caudalie	20,7	9,9%
Wala/Hauschka	19,6	-4,0%

Source: IH APO-Fusion OTC, Personal Care Subcategories

Of the 15 leading personal care manufacturers, there are nine with positive performance in local pharmacies (CAGR vs. 2YA): in particular CeraVe (by L'Oreal) Medicos Kosm. (formerly P&M Cosmetics), Caudalie and Schülke & Mayr.

Six of them are showing a decline, especially Vichy, Wala/Hauschka and Hartmann.

Dynamics Top Personal Care Manufacturers (Local Pharmacy) (MAT)

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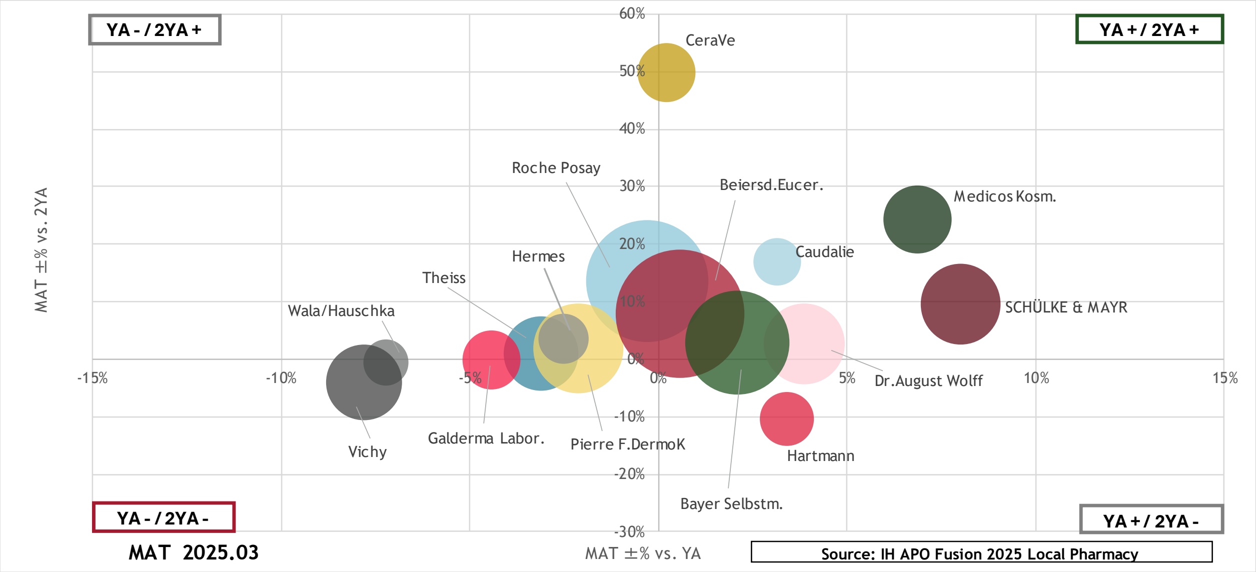

Interpretation example: CeraVe has performed very positively in the current MAT and in the previous year's MAT → top right quadrant

OTC Top Brands – Local Pharmacy (MAT)

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Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA
OTC Category - Top Brands	**8.702,9**	**2,8%**
VOLTAREN	182,7	-3,5%
SINUPRET	166,7	3,6%
WICK	135,0	3,7%
FRESUBIN	134,7	12,3%
ASPIRIN	111,2	-0,5%
HYLO	103,1	6,0%
ORTHOMOL	100,3	4,1%
IBEROGAST	94,0	5,2%
NASENSPRAY RATIOPHARM	93,6	9,0%
GRIPPOSTAD	87,3	4,9%
BRONCHIPRET	87,3	3,0%
OMNI BIOTIC	84,0	21,3%
ACC	83,6	-2,5%
GELOMYRTOL	82,6	3,0%
DOBENDAN	81,5	-5,6%

Source: IH APO-Fusion OTC, OTC Category

11 brands among the 15 leading OTC brands performed positively in local pharmacies (CAGR vs. 2 years ago): in particular the probiotics brand OMNi-BiOTiC, Fresubin (liquid nutrition) and the cold brands such as Grippostad and nasal spray Ratiopharm and Bronchipret.

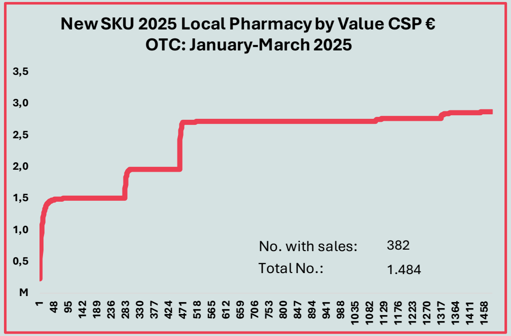
Personal Care Top Brands – Local Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.03 Local Pharmacy	±% CAGR vs. 2YA
Personal Care Category - Top Brands	**1.447,8**	**2,2%**
EUCERIN	152,3	4,2%
ROCHE POSAY	137,7	6,4%
BEPANTHEN	86,3	3,8%
AVENE	61,1	-0,3%
VICHY	53,7	-6,0%
LINOLA	53,2	3,1%
OCTENISEPT	52,5	9,4%
DERMASENCE	43,4	9,0%
CERAVE	31,8	22,5%
OLIVENOEL DR THEISS	30,8	3,2%
CAUDALIE	20,7	9,9%
STERILLIUM	20,5	-7,7%
BETAISODONA	19,7	4,2%
DR HAUSCHKA	19,6	-4,0%
CETAPHIL	19,5	0,2%

Source: IH APO-Fusion OTC, Personal Care Category

Eleven brands among the top 15 Personal Care brands performed positively in local pharmacies (CAGR vs. 2YA): in particular CeraVe, Octenisept, Caudalie, Dermasence and Roche Posay

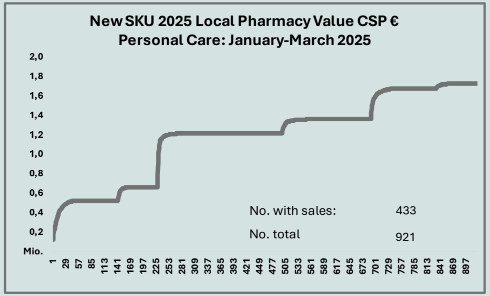
New SKU in Local Pharmacies 2025 - OTC



10 Leading OTC New SKU 2025 by avg. Sales per Month			
since	Local Pharmacy	YTD 2025.03	per Month
01.01.2025	19383570 THOMAPYRIN TENSION DUO 400 36 ST	220.263	73.421
01.02.2025	19375725 IBUPROFEN ELAC 400MG FTA 20 ST	130.504	65.252
01.01.2025	19456091 OMNI BIOTIC PANDA TROPFEN 8 ML	175.561	58.520
01.01.2025	19306747 NEO-HYDRO LUTSCHTABL MENTH 24 ST	148.999	49.666
01.01.2025	19176457 NASIC MOMETASON HEUSCHNSPR 10 G	136.876	45.625
01.01.2025	19268573 ELOTRANS RELOAD APFEL 15X7.45 G	116.246	38.749
01.02.2025	19375754 IBUPROFEN ELAC 400MG FTA 50 ST	73.349	36.674
01.03.2025	19386574 NEUROPAX-RATIOPHARM FORTE 40 ST	29.402	29.402
01.02.2025	19485477 DR.BOEHM HAUT HAAR NAG KUR 180 ST	53.524	26.762
01.01.2025	19176463 NASIC MOMETASON HEUSCHNSPR 18 G	78.995	26.332

Source: IH APO-Monitor 2025

New SKU in Local Pharmacy 2025 – Personal Care

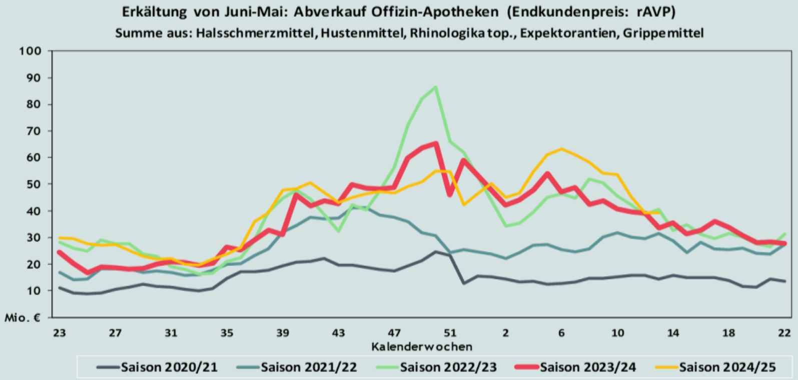


10 Leading Personal Care New SKU 2025 by avg. Sales per Month			
since	Local Pharmacy	YTD 2025.03	per Month
01.03.2025	19337819 WIDMER PRO CREME AUGEN OP 30 ML	68.876	68.876
01.02.2025	19499054 NUXE NUXURIANCE ULTRA EXCE 75 ML	134.843	67.421
01.02.2025	19398933 ROCHE POSAY AN A-P UVM 50+ 50 ML	129.706	64.853
01.03.2025	19637817 ORTHOMOL HAIR SOLUTION 100 ML	44.251	44.251
01.02.2025	19398962 ROCHE POSAY ANT UVAIR 50+ 40 ML	88.063	44.032
01.01.2025	19498876 NUXE VROSE LIP PLUMP GLOSS 8 ML	123.790	41.263
01.03.2025	18442170 WIDMER PRO TAGESCR UV30 OP 50 ML	27.188	27.188
01.03.2025	18442158 WIDMER PRO NACHTCR REI OP 50 ML	25.697	25.697
01.02.2025	19398956 ROCHE POSAY AN K+G UVM 50+ 150 ML	43.015	21.507
01.02.2025	19727147 HAND UND SCHRUNDENSALBE 70 ML	39.092	19.546

Source: IH APO-Monitor 2025

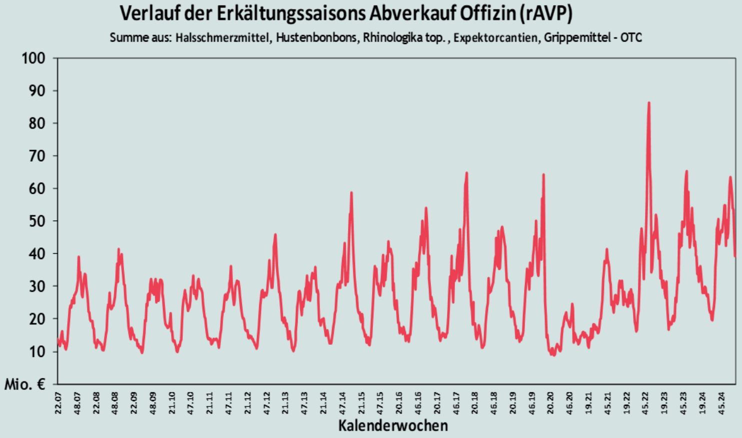
Cold season: Mild and dry December with significant rainfall deficits in many regions

INSIGHT HEALTH



The cold season of 2025 initially started at the level of previous years. The high peaks of the last two years were not reached in the first quarter of 2025.

@ Last March, sun worshippers got their money's worth. The central star shone for a record-breaking length of time in some regions. It was also far too mild and far too dry across the board, which significantly increased the risk of forest fires early on in the year. In addition, soil moisture in the upper layers was up to 20 percent (%) below the long-term minimum values in some areas, particularly in the north of the country. However, deeper soil layers were still well supplied and the groundwater reservoirs were replenished. Pronounced high-pressure weather conditions were largely responsible for the low precipitation and sunny weather. A weather situation characterized by high pressure was classified on a total of 20 days in March. This was reported by the German Weather Service (DWD) following initial evaluations of the results from its approximately 2,000 measuring stations.



Source: IH APO Weekly 2025

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