Insight Health
OTC-Scanner Pharmacy – Germany

2nd Quarter 2025

INSIGHT HEALTH

Insight Health OTC Scanner (DE)

INSIGHT HEALTH

- 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:

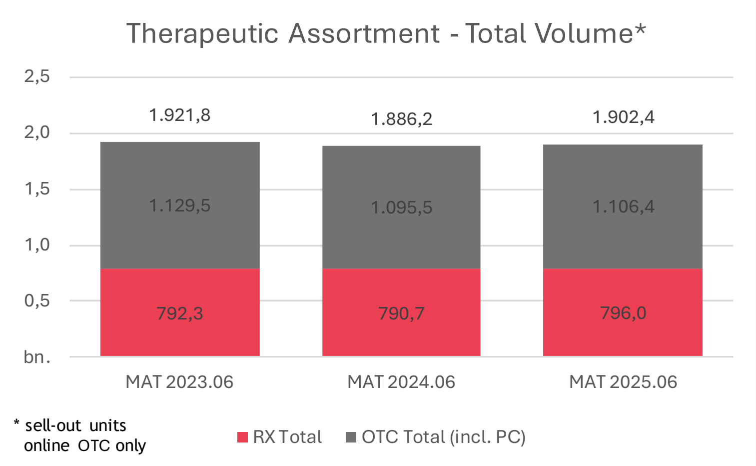
- Sales by prescription/cash sale
- Leading OTC & Personal Care (PC) Categories
- Leading OTC & personal care (PC) manufacturers and brands (local pharmacy)
- Dynamics of the leading manufacturers and Brands (local pharmacy)
- New preparations (SKU) of the current year (local pharmacy)
- Season Charts: 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

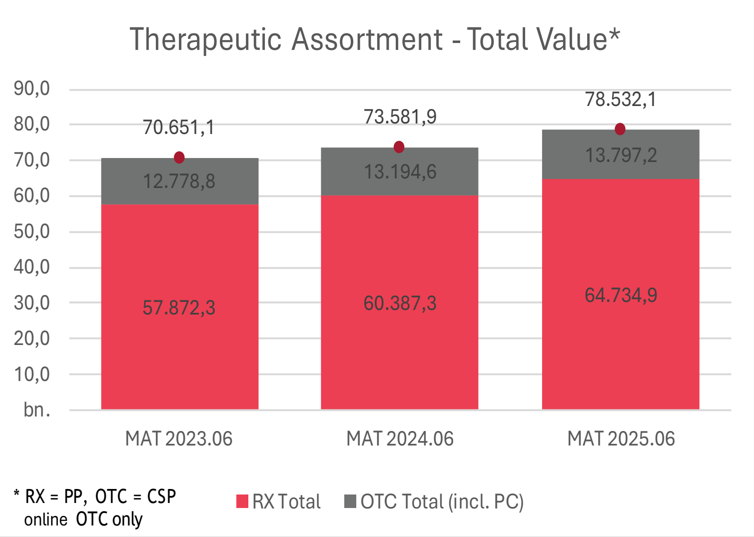
DatamedIQ

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



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

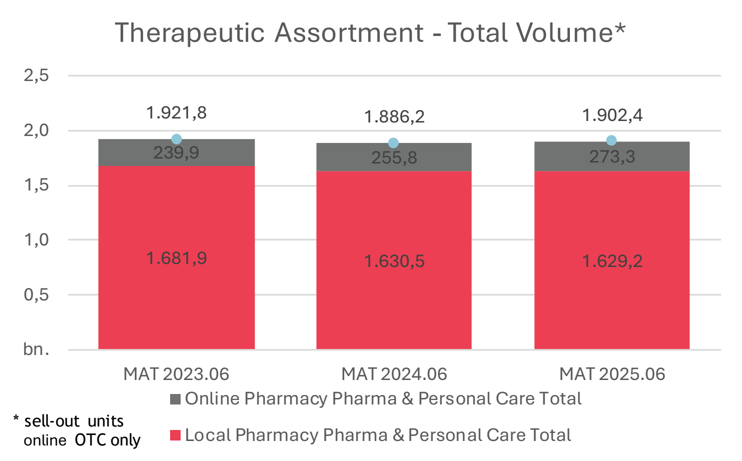
	±% YA	±% VVJ	±% CAGR
Value development	**6,7%**	**4,1%**	**5,4%**
Rx Total	7,2%	4,3%	5,8%
OTC Total (incl. PC)	4,6%	3,3%	3,9%



Source: IH APO-Monitor 2025

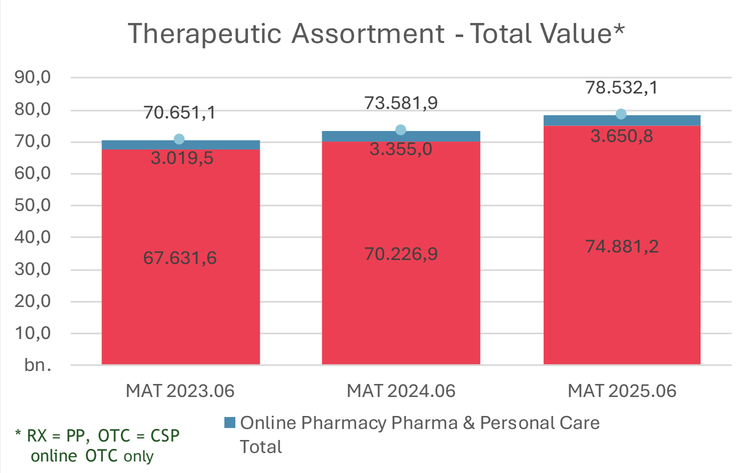
DatamedIQ

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



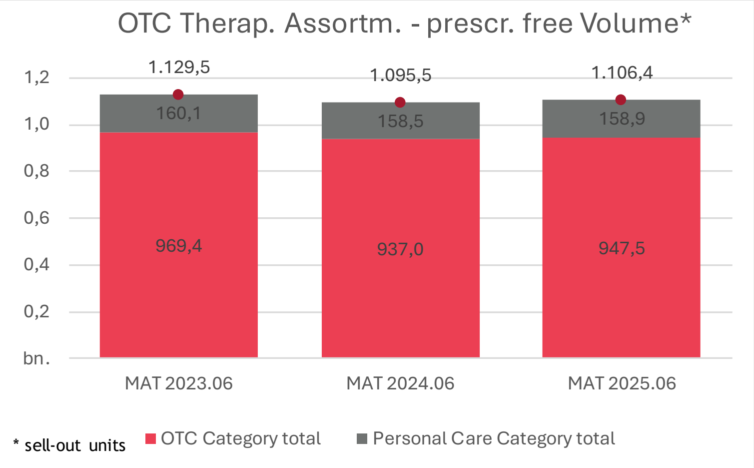
	±% YA	±% 2YA	±% CAGR
Volume development	**0,9%**	**-1,8%**	**-0,5%**
Local Pharmacy	-0,1%	-3,1%	**-1,6%**
Online Pharmacy	6,8%	6,6%	6,7%

	±% YA	±% 2YA	±% CAGR
Value development	**6,7%**	**4,1%**	**5,4%**
Local Pharmacy	6,6%	3,8%	**5,2%**
Online Pharmacy	8,8%	11,1%	10,0%



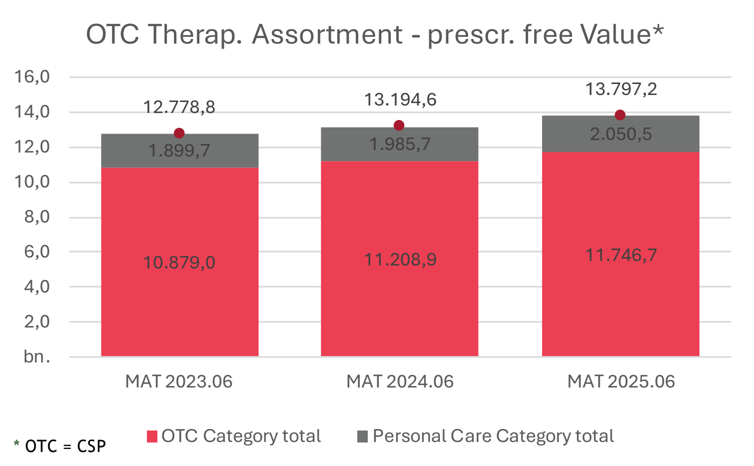
Source: IH APO-Monitor 2025

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



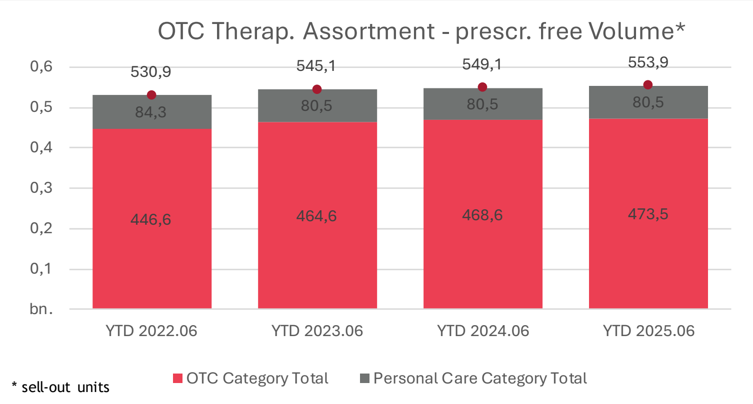
	±% YA	±% 2YA	±% CAGR
Volume Development	**1,0%**	**-3,0%**	**-1,0%**
OTC Category Total	1,1%	-3,3%	-1,1%
Personal Care Category Total	0,2%	-1,0%	-0,4%

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



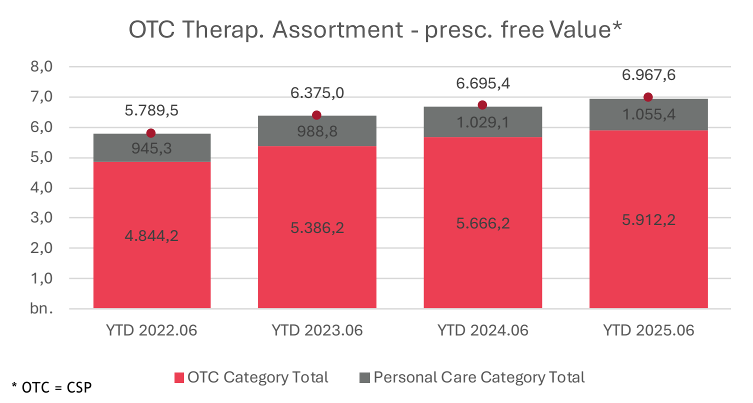
Source: IH APO-Monitor 2025

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



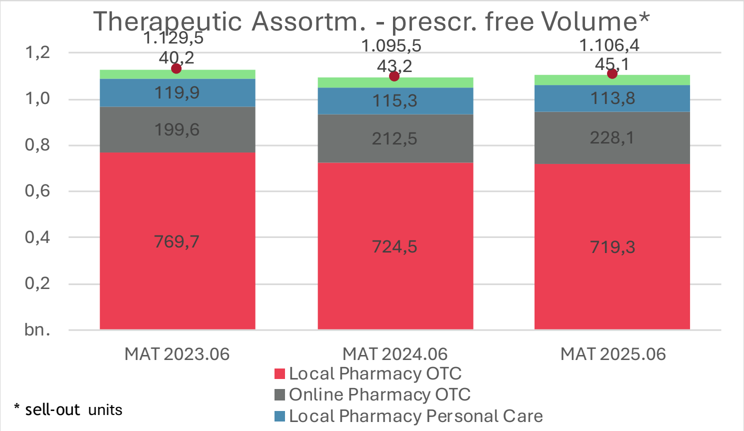
	±% YA	±% 2YA	±% 3YA	±% CAGR
Volume devlopment	**0,9%**	**0,7%**	**2,7%**	**1,4%**
OTC Category Total	1,0%	0,9%	4,0%	2,0%
Personal Care Category Total	-0,1%	0,0%	-4,5%	-1,5%

	±% YA	±% 2YA	±% 3YA	±% CAGR
Value Development	**4,1%**	**5,0%**	**10,1%**	**6,4%**
OTC Category Total	4,3%	5,2%	11,2%	6,9%
Personal Care Category Total	2,6%	4,1%	4,6%	3,7%



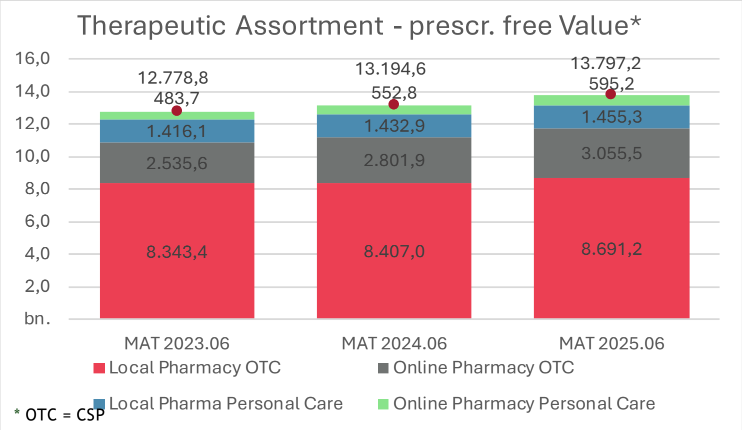
Source: IH APO-Monitor 2025

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



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

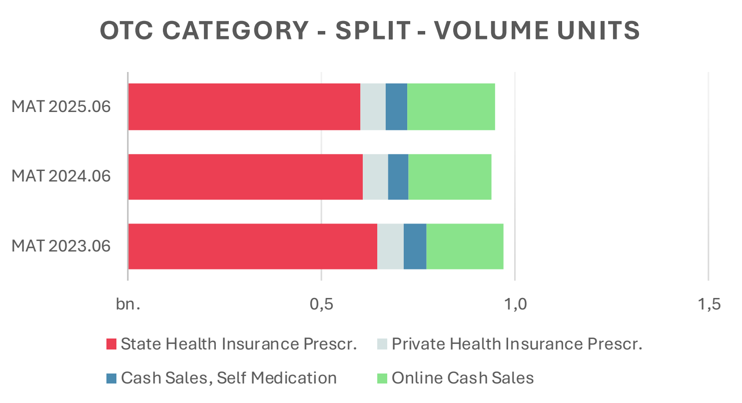
	±% YA	±% VVJ	±% CAGR
Value Development	**4,6%**	**3,3%**	**3,9%**
Local Pharmacy OTC	3,4%	0,8%	2,1%
Online Pharmacy OTC	9,1%	10,5%	9,8%
Local Pharmacy Personal Care	1,6%	1,2%	1,4%
Online Pharmacy Personal Care	7,7%	14,3%	10,9%



Source: IH APO-Monitor 2025

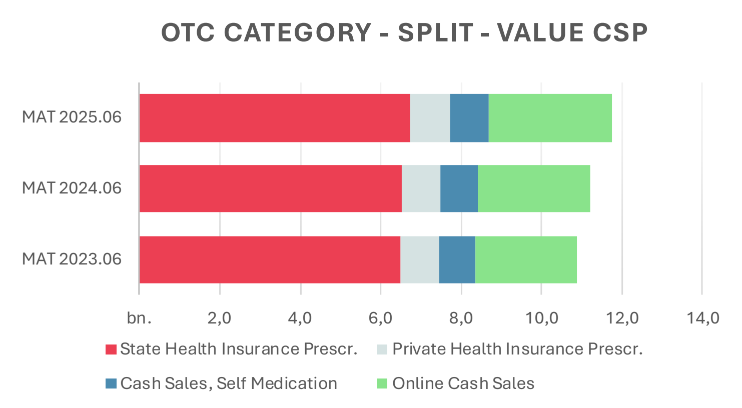
DatamedIQ

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



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

Sales Value Development	±% YA	±% 2YA	±% CAGR
OTC Category	**4,8%**	**3,0%**	**3,9%**
State Health Insurance Prescr.	3,4%	0,5%	2,0%
Private Health Insurance Prescr.	3,0%	0,3%	1,6%
Cash Sales, Self Medication	3,3%	3,3%	3,3%
Online Cash Sales	9,1%	10,5%	9,8%



*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 2025.06 Pharmacy Total	±% CAGR vs. 2YA	Online Pharmacy Share
OTC Category - Leading Subcategories	**11.745,1**	**3,9%**	**26%**
Cough & Cold	2.397,5	1,8%	20%
Digestion	1.619,9	6,7%	26%
Vitamins & Minerals	1.562,9	5,1%	32%
Analgesics (excl. M)	849,2	2,2%	20%
Skin, Hair & Nails	750,8	5,3%	34%
Muscles & Joints (incl. Pain)	704,7	2,8%	29%
Cardiovascular Remedies & Cholesterol	501,9	3,5%	42%
Urogenital agents (bladder, prostate, hormones, etc.)	491,9	5,5%	29%
Miscellanea	452,7	4,1%	19%
Eye Preparations	444,1	5,8%	25%
Nutrients	354,3	8,1%	9%
Allergy	344,6	8,1%	22%
Calm & Sleep	339,7	2,8%	29%
Homeopathy and Panacea	234,0	-3,5%	38%
Oral & Dental Care	203,5	4,1%	20%

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 June 2025. The compound annual growth rate (CAGR vs. 2 years ago) is 3.9 %.

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 2025.06 Pharmacy Total	±% CAGR vs. 2YA	Online Pharmacy Share
Personal Care Category - Leading Subcategories	**2.050,5**	**3,9%**	**29%**
Face Clean & Care	545,9	3,0%	31%
Body Clean & Care	404,7	3,1%	31%
Other Skin Preparations	309,2	4,8%	26%
Wound Healing	275,8	5,6%	23%
Sun Protection	145,3	6,9%	31%
Hair Care	80,2	11,9%	37%
Intimate Care	69,6	9,6%	33%
Oral Hygiene	66,1	-0,1%	35%
Foot Care	49,9	-3,8%	25%
Miscellanea	48,0	1,5%	16%
Children & Baby Care	26,4	-3,0%	22%
Decorative Cosmetics	22,9	-5,1%	31%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total achieved sales of € 2.1 billion at retail prices in the 12 rolling months period (MAT) ending June 2025.

The compound annual growth rate (CAGR vs. 2 years ago) is 3.9 %. Eight categories achieved growth and five were growing above-average, especially Hair Care. Decorative Cosmetics, Foot Care and Children & Baby Care are still declining.

The average share of online pharmacies is 29 %. Seven categories achieve an above-average online share.

OTC Category – German Pharmacy Total (YTD)

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Sales Value in Consumer Prices (mil.)	YTD 2025.06 Pharmacy Total	±% CAGR vs. 3YA	Online Pharmacy Share
OTC Categories - Leading Subcategories	**5.911,5**	**6,9%**	**27%**
Cough & Cold	1.185,6	14,2%	20%
Digestion	814,5	7,7%	27%
Vitamins & Minerals	787,1	5,8%	32%
Analgesics (excl. M)	424,0	5,6%	21%
Skin, Hair & Nails	366,8	4,2%	35%
Muscles & Joints (incl. Pain)	352,7	2,2%	30%
Cardiovascular Remedies & Cholesterol	252,3	3,4%	43%
Urogenital agents (bladder, prostate, hormones, etc.)	240,7	6,6%	30%
Miscellanea	216,6	3,2%	20%
Eye Preparations	225,5	6,8%	26%
Nutrients	176,9	9,5%	9%
Allergy	236,9	10,3%	22%
Calm & Sleep	169,9	2,5%	30%
Homeopathy and Panacea	115,7	-1,8%	38%
Oral & Dental Care	101,5	5,5%	20%

Source: IH APO-Fusion OTC, OTC Subcategories

The OTC categories in total achieved a turnover of € 5.9 billion at retail prices in the January to June 2025 period. The compound annual growth rate (YTD-CAGR vs. 3 years ago) is 6.9 %.

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 27%. 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 2025.06 Pharmacy Total	±% CAGR vs. 3YA	Online Pharmacy Share
Personal Care Category - Leading Subcategories	1.055,4	3,7%	30%
Face Clean & Care	278,5	3,6%	32%
Body Clean & Care	208,9	2,4%	32%
Other Skin Preparations	157,0	4,0%	26%
Wound Healing	138,2	5,5%	24%
Sun Protection	92,1	9,1%	32%
Hair Care	40,1	10,4%	38%
Intimate Care	34,3	8,0%	33%
Oral Hygiene	32,5	-0,9%	36%
Foot Care	25,4	-3,7%	27%
Miscellanea	20,2	-0,6%	16%
Children & Baby Care	13,6	-3,8%	24%
Decorative Cosmetics	11,5	-5,3%	32%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total achieved sales of € 1.1 Bio. at retail prices in the January to June 2025 period. The compound annual growth rate (YTD-CAGR vs. 3 years ago) is 3.7 %.

Seven categories achieved growth, especially Sun Protection. Decorative Cosmetics, Children & Baby Care and Foot Care are still declining.

The average share of online pharmacies is 30 %. Seven categories achieve an above-average online share.

OTC Category – Local & Online Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.06 Local Pharmacy	±% CAGR vs. 2YA	MAT 2025.06 Online Pharmacy	±% CAGR vs. 2YA
OTC Category - Leading Subcategories	**8.689,6**	**2,1%**	**3.055,5**	**9,8%**
Cough & Cold	1.927,2	-0,3%	470,3	11,9%
Digestion	1.202,8	4,6%	417,2	13,7%
Vitamins & Minerals	1.063,4	3,4%	499,5	9,1%
Analgesics (excl. M)	676,2	1,1%	172,9	6,6%
Muscles & Joints (incl. Pain)	498,4	1,3%	206,3	6,9%
Skin, Hair & Nails	498,2	2,6%	252,6	11,4%
Miscellanea	365,7	3,0%	87,0	9,1%
Urogenital agents (bladder, prostate, hormones, etc.)	348,5	4,1%	143,3	9,3%
Eye Preparations	333,9	4,3%	110,2	10,7%
Nutrients	322,4	7,8%	31,9	11,2%
Cardiovascular Remedies & Cholesterol	291,1	0,1%	210,8	8,9%
Allergy	268,3	6,6%	76,3	14,0%
Calm & Sleep	240,3	1,4%	99,4	6,4%
Oral & Dental Care	163,8	2,3%	39,7	12,4%
Homeopathy and Panacea	146,2	-6,1%	87,9	1,2%

Source: IH APO-Fusion OTC, OTC Subcategories

The OTC categories in total grew in the MAT June 2025 in local pharmacies with € 8.7 billion at retail prices and 2.1% (CAGR vs. VVJ), while the online sales grew by 9.8% to € 3.1 billion.

Nutrients and 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 one category shows a decrease.

Online sales again show dynamic growth. In the mail order business, seven categories are growing well above average.

Personal Care Category – Local & Online Pharmacy (MAT)

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Sales Value in Consumer Prices (mil.)	MAT 2025.06 Local Pharmacy	±% CAGR vs. 2YA	MAT 2025.06 Online Pharmacy	±% CAGR vs. 2YA
Personal Care Category - Leading Subcategories	**1.455,3**	**1,4%**	**595,2**	**10,9%**
Face Clean & Care	375,9	-0,2%	170,0	11,5%
Body Clean & Care	278,4	1,0%	126,3	8,2%
Other Skin Preparations	230,4	2,6%	78,9	12,3%
Wound Healing	211,4	2,9%	64,5	16,4%
Sun Protection	100,5	4,8%	44,7	12,2%
Hair Care	50,6	7,9%	29,6	19,8%
Intimate Care	46,9	7,8%	22,7	13,7%
Oral Hygiene	43,1	-2,9%	23,0	5,8%
Miscellanea	40,3	1,4%	7,6	2,1%
Foot Care	37,2	-4,2%	12,7	-2,5%
Children & Baby Care	20,6	-3,8%	5,9	-0,1%
Decorative Cosmetics	15,9	-10,0%	7,0	10,0%

Source: IH APO-Fusion OTC, Personal Care Subcategories

The personal care categories in total are growing in the MAT June 2025 in local pharmacies by 1.4% (CAGR vs. VVJ) and reach € 1.46 billion at retail price. Online sales grew more dynamically at 10.9% (CAGR vs. VVJ).

Above all, hair care, intimate 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 2025.06 Local Pharmacy	±% CAGR vs. 2YA
OTC Category - Top Manufacturers	**8.691,2**	**2,1%**
ratiopharm	434,0	2,9%
Bayer Selbstm.	405,5	3,7%
Haleon Germany	380,2	-2,5%
STADA	363,3	3,4%
Bionorica	309,6	2,9%
WICK Pharma	298,7	4,7%
A.Nattermann	272,1	2,1%
Hexal	239,9	-4,0%
Klosterfrau	231,0	-3,4%
Kenvue Ger.OTC	182,2	0,9%
Schwabe	165,3	-1,3%
Medice Arzn.	162,4	3,3%
Reckitt/Benck.	158,9	-1,9%
Pohl-Boskamp	151,9	2,3%
Ursapharm	145,8	4,0%

Source: IH APO-Fusion OTC, OTC Subcategories

Of the 15 leading OTC manufacturers, ten show growth (CAGR vs. 2 years ago) in local pharmacies: most notably the manufacturers with cough & cold products, like Wick Pharma, Ursapharm, Bayer Selbstm., Medice and Stada.

Of the all the 15 manufacturers, five were showing a decline (CAGR vs. 2YA).

Dynamics Top OTC Manufacturers (Local Pharmacy) (MAT)

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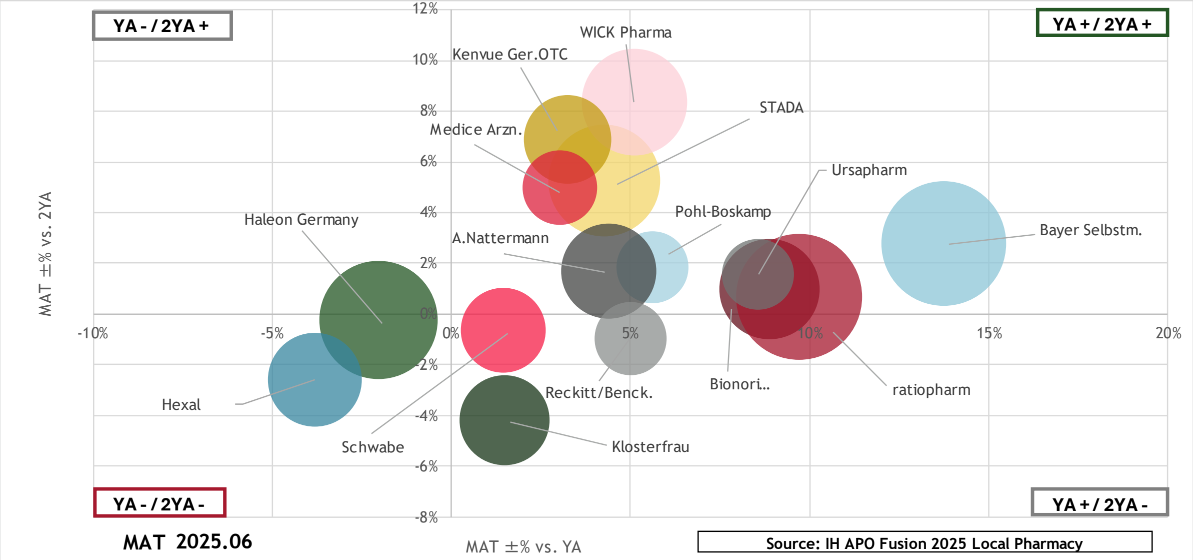


Interpretation example:
Pohl-Boskamp performed very positively in the current MAT but not in the previous year's MAT → bottom right quadrant

Personal Care Top Manufacturers – Local Pharmacy (MAT)

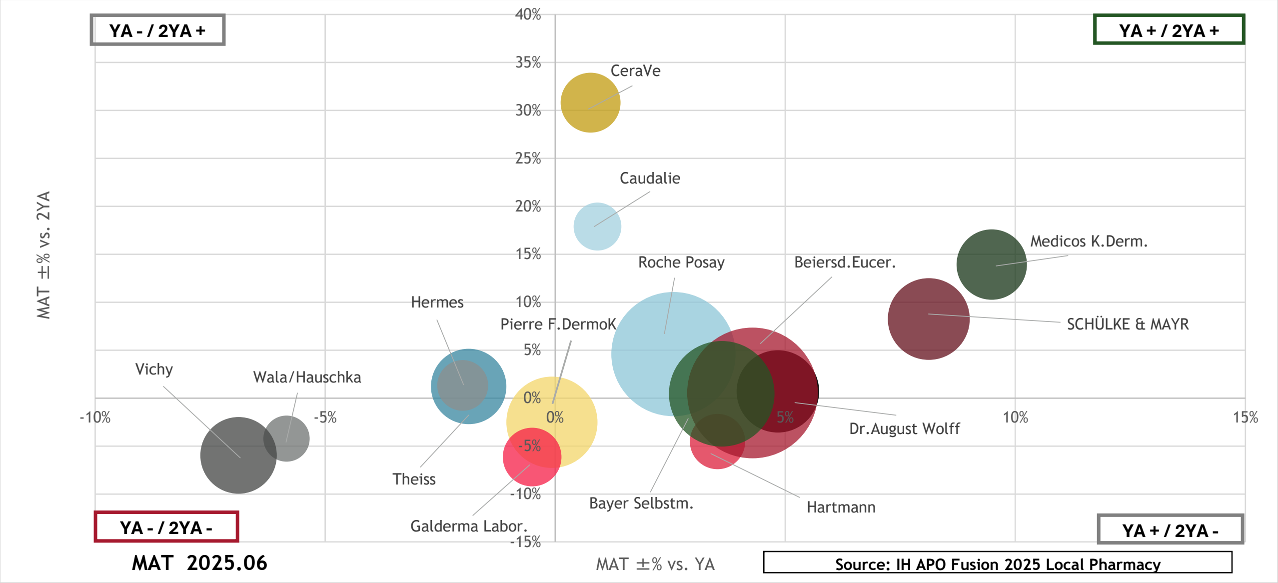
Sales Value in Consumer Prices (mil.)	MAT 2025.06 Local Pharmacy	±% CAGR vs. 2YA
Personal Care Categories - Top Manufacturers	**1.455,3**	**1,4%**
Beiersd.Eucer.	154,3	2,4%
Roche Posay	139,4	3,6%
Bayer Selbstm.	101,0	2,0%
Pierre F.DermoK	75,2	-1,3%
Dr.August Wolff	61,3	2,7%
SCHÜLKE & MAYR	60,4	8,2%
Vichy	52,9	-6,4%
Theiss	51,4	-0,3%
Medicos K.Derm.	44,8	11,7%
CeraVe	32,5	14,8%
Galderma Labor.	31,1	-3,4%
Hartmann	27,6	-0,6%
Hermes	23,3	-0,4%
Caudalie	20,7	9,1%
Wala/Hauschka	19,3	-5,0%

Source: IH APO-Fusion OTC, Personal Care Subcategories

Of the 15 leading personal care manufacturers, there are eight 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.

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

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



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 2025.06 Local Pharmacy	±% CAGR vs. 2YA
OTC Category - Top Brands	**8.691,2**	**2,1%**
VOLTAREN	181,2	-3,7%
SINUPRET	163,9	1,9%
FRESUBIN	136,8	10,9%
WICK	132,1	2,4%
ASPIRIN	108,7	-1,1%
HYLO	104,7	5,7%
ORTHOMOL	100,1	2,7%
IBEROGAST	99,1	11,6%
NASENSPRAY RATIOPHARM	95,8	8,8%
OMNI BIOTIC	86,3	18,7%
GRIPPOSTAD	85,9	3,5%
BRONCHIPRET	83,9	0,5%
GELOMYRTOL	80,7	0,8%
ACC	80,3	-4,6%
DOBENDAN	78,9	-7,3%

Source: IH APO-Fusion OTC, OTC Category

Eight 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), as well as Iberogast and the cold brands such as Grippostad and nasal spray Ratiopharm.

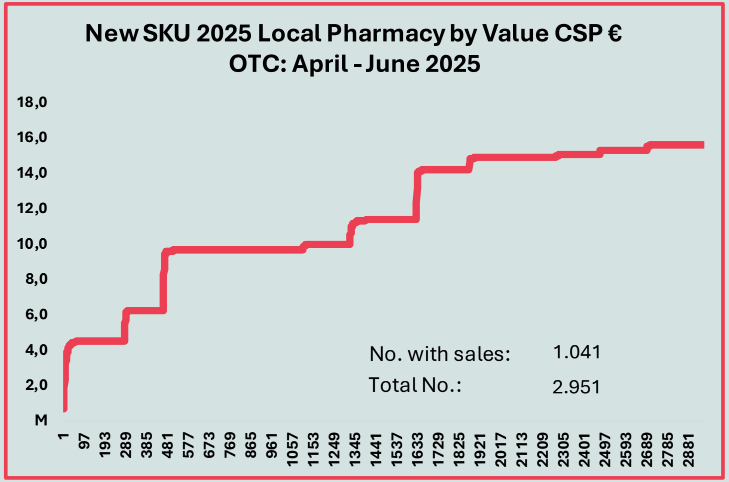
Personal Care Top Brands – Local Pharmacy (MAT)

Sales Value in Consumer Prices (mil.)	MAT 2025.06 Local Pharmacy	±% CAGR vs. 2YA
Personal Care Category - Top Brands	**1.455,3**	**1,4%**
EUCERIN	154,3	2,4%
ROCHE POSAY	139,4	3,6%
BEPANTHEN	87,1	3,3%
AVENE	60,9	-1,6%
OCTENISEPT	53,6	8,6%
LINOLA	53,5	2,6%
VICHY	52,9	-6,4%
DERMASENCE	44,8	8,7%
CERAVE	32,5	14,8%
OLIVENOEL DR THEISS	31,2	3,6%
STERILLIUM	20,8	-3,5%
CAUDALIE	20,7	9,1%
BETAISODONA	19,7	2,7%
CETAPHIL	19,7	-0,5%
DR HAUSCHKA	19,3	-5,1%

Source: IH APO-Fusion OTC, Personal Care Category

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

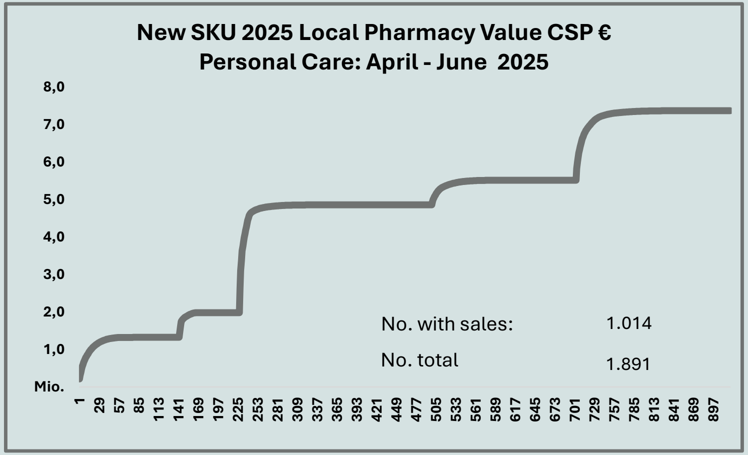
New SKU in Local Pharmacies 2025 - OTC



10 Leading OTC New SKU 2025 by avg. Sales per Month			
since	Local Pharmacy	YTD 2025.06	per Month
15.03.2025	16884923 FEMANNOSE F 14 ST	950.927	237.732
15.03.2025	18879010 BEPANCARE NARBEN GEL 20 ML	872.293	218.073
01.04.2025	16891113 LOPEDIUM AKUT LINGUAL 2MG 10 ST	473.919	157.973
01.02.2025	19375725 IBUPROFEN ELAC 400MG FTA 20 ST	743.895	148.779
01.01.2025	19268573 ELOTRANS RELOAD APFEL 15X7.45 G	710.105	118.351
01.01.2025	19383570 THOMAPYRIN TENSION DUO 400 36 ST	696.091	116.015
15.03.2025	16884952 FEMANNOSE F 30 ST	452.224	113.056
15.05.2025	19679678 CLENSIA PLE 192X1 P	162.866	81.433
01.01.2025	19456091 OMNI BIOTIC PANDA TROPFEN 8 ML	476.385	79.398
01.01.2025	19176457 NASIC MOMETASON HEUSCHNSPR 10 G	466.489	77.748

Source: IH APO-Monitor 2025

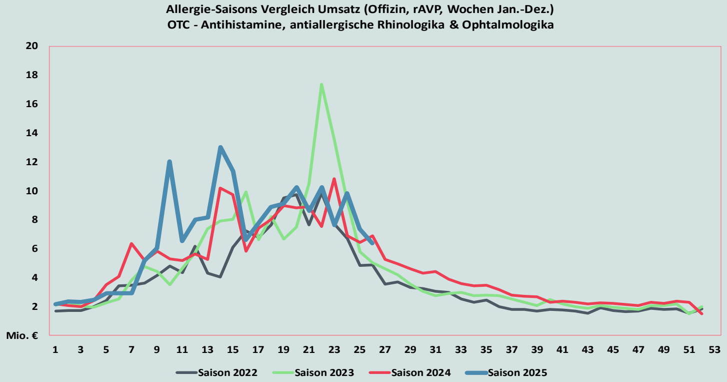
New SKU in Local Pharmacy 2025 – Personal Care



10 Leading Personal Care New SKU 2025 by avg. Sales per Month			
since	Local Pharmacy	YTD 2025.06	per Month
01.02.2025	19398933 ROCHE POSAY AN A-P UVM 50+ 50 ML	631.368	126.274
01.02.2025	19398962 ROCHE POSAY ANT UVAIR 50+ 40 ML	492.631	98.526
01.03.2025	19337819 WIDMER PRO CREME AUGEN OP 30 ML	309.813	77.453
01.02.2025	19398956 ROCHE POSAY AN K+G UVM 50+ 150 ML	269.972	53.994
01.04.2025	19647589 ALLGAEUER LAT HORNHAUT RED 150 ML	158.354	52.785
01.02.2025	19499054 NUXE NUXURIANCE ULTRA EXCE 75 ML	253.779	50.756
01.03.2025	19637817 ORTHOMOL HAIR SOLUTION 100 ML	181.937	45.484
15.04.2025	19629137 MEDIPHARMA COS RET INT SER 30 ML	123.804	41.268
01.01.2025	19498876 NUXE VROSE LIP PLUMP GLOSS 8 ML	215.250	35.875
01.04.2025	19517059 EUCERIN SUN OIL GC F+B 50+ 1 ST	102.329	34.110

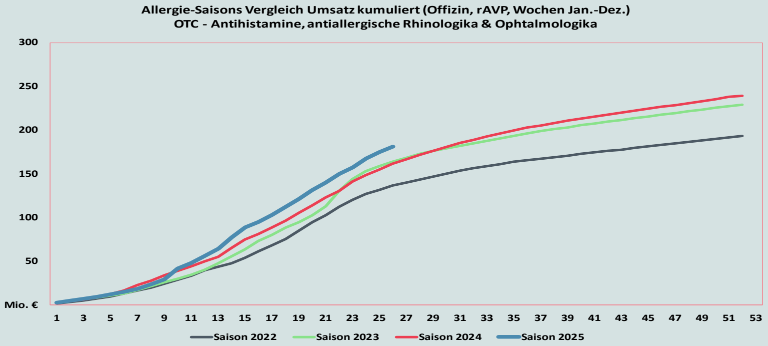
Source: IH APO-Monitor 2025

Allergy season: A Summer with ups and downs



The 2025 allergy season initially started just above the level of previous years. Due to the warm weather and unusually high temperatures from the end of March into June, allergy sufferers were at an increased risk due to the increased pollen count.

@ June 2025 was exceptionally warm, far too dry and abundantly sunny in Germany. Every June in Germany since 2010 has been too warm. This was reported by the German Weather Service (DWD) following initial evaluations of the results from its approximately 2,000 measuring stations. The first meteorological summer month started with a bang. There were heavy showers and thunderstorms including heavy rain, squalls and hail almost throughout Germany. This was to remain the timetable for the whole of June. Nevertheless, it was too dry in the end due to high-pressure phases with lots of sunshine. There were also repeated short heatwaves.Translated with DeepL.com (free version)



Source: IH APO Weekly 2025

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