

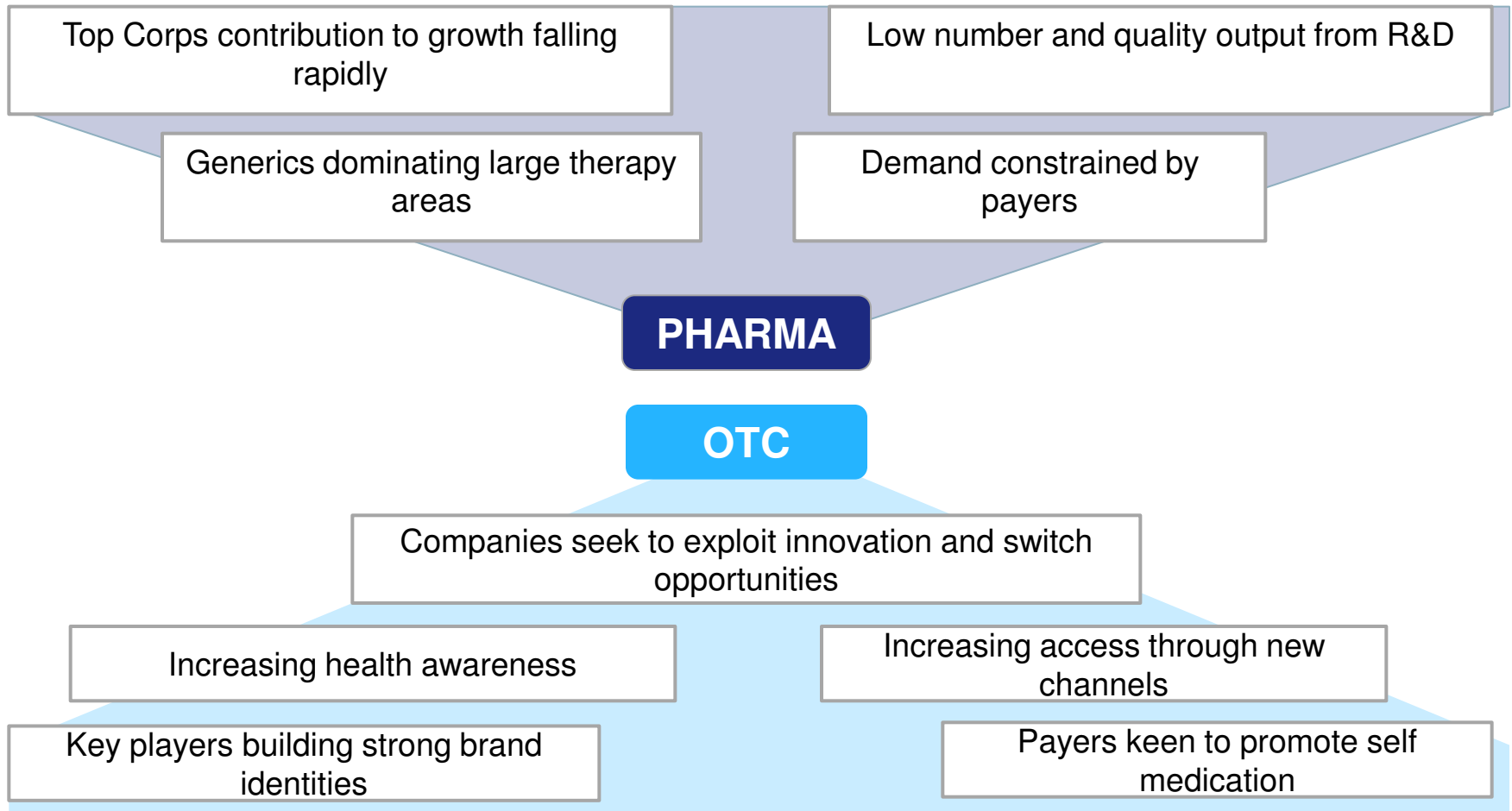
The German Consumer Healthcare OTC Market

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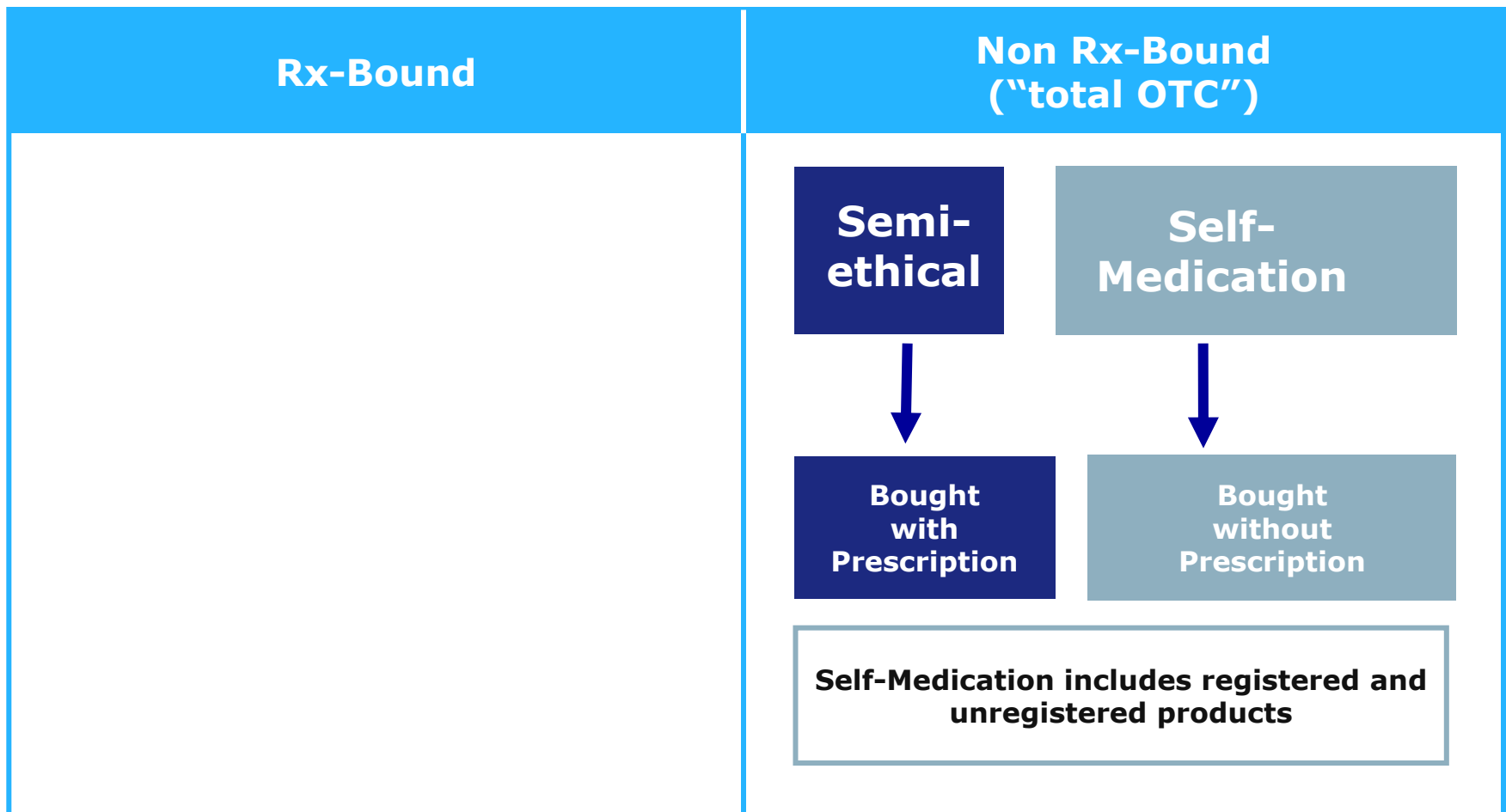


While Pharma growth experiences a number of constraints, OTC still benefits from a range of growth drivers



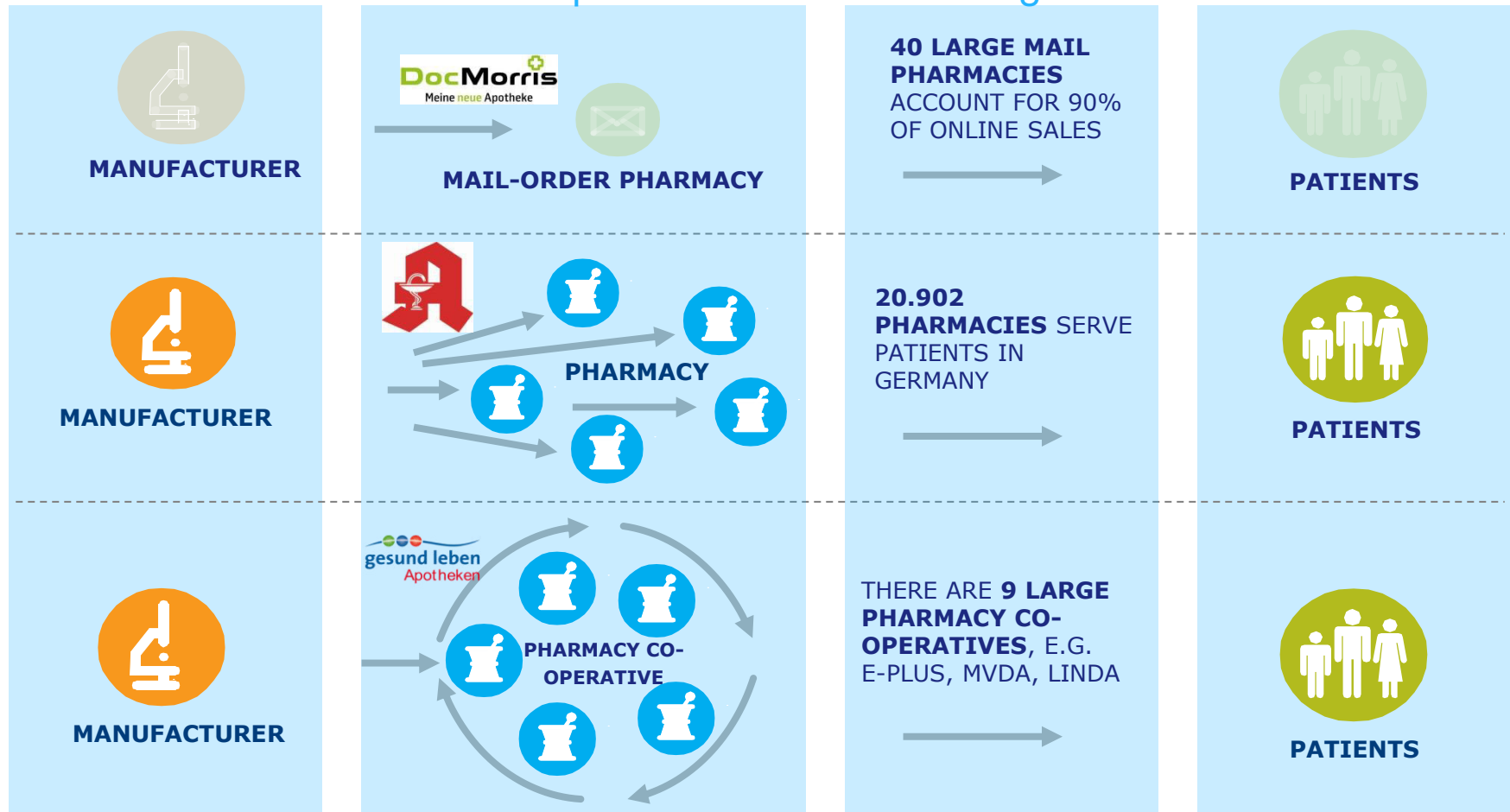
OTC are non-prescription drugs and are sold either in pharmacies or are available for general sale

OTC Data splits pack sales into self medication and prescription











Only pharmacies are allowed to sell pharmacy-only OTC drugs which dominate the market

New distribution models appear with pharmacy mail order and co-operatives while the number of traditional pharmacies is decreasing

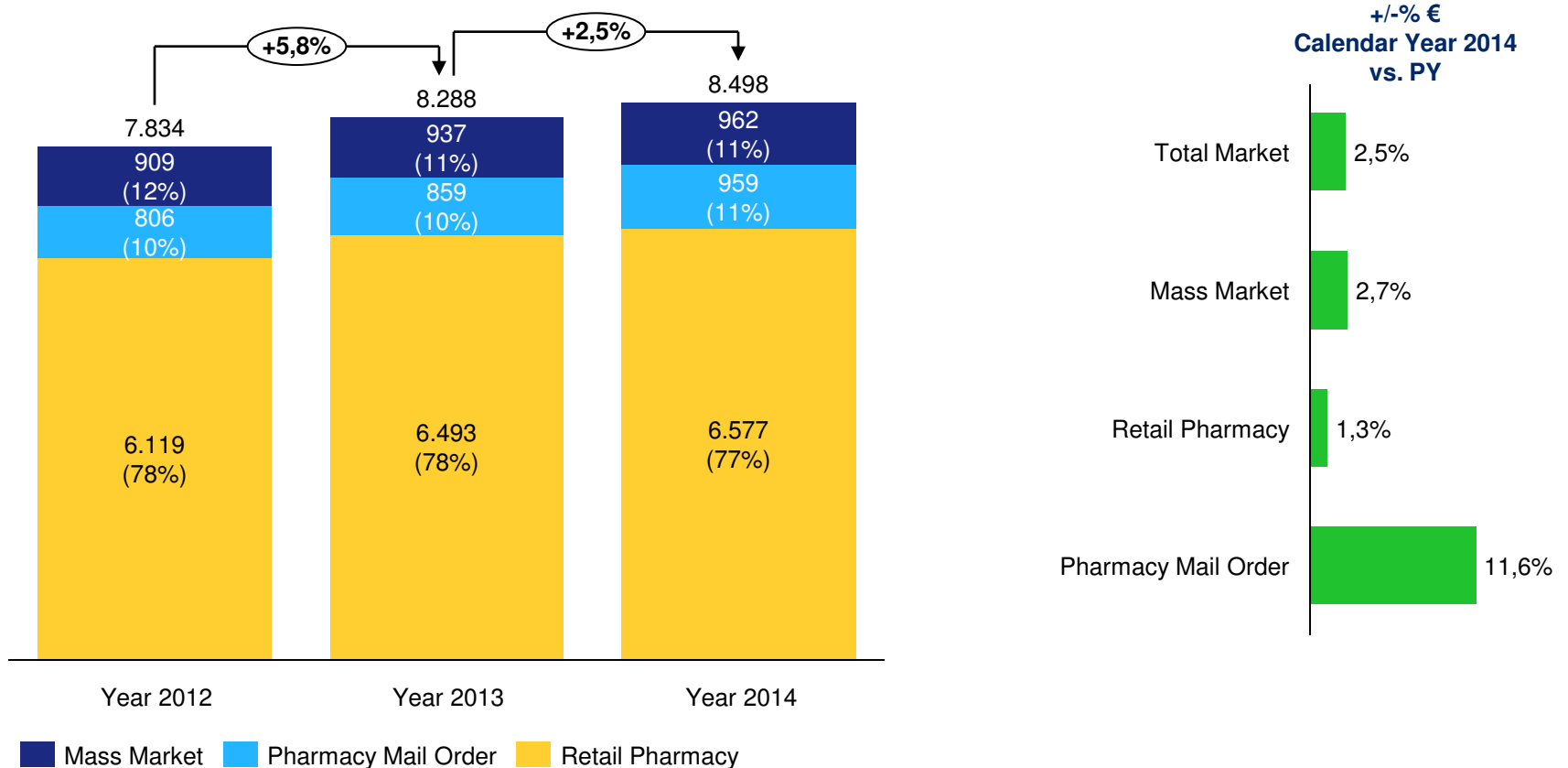


Mail order channel improved price transparency for the consumer and changes consumers' shopping behavior

	Product and Pack description	Price Pharmacy 2014		Price Mail Order 2014
	GRIPPOSTAD C HARTKAPSELN 24	9,47€	➔	5,54€
	IBEROGAST TROPF 1 20 ML	9,33€	➔	6,66€
	VOLTAREN NV- GEL SCHMERZ 11.6 MG /G 1 120 G	11,61€	➔	8,97€
	SINUPRET UEB.T.EXTRAK 20	12,94€	➔	9,36€
	VOLTAREN NV- GEL SCHMERZ 23.2 MG /G 1 100 G	16,10€	➔	11,97€
	NASENSPRAY-RATIO. NAS.SPR.O.K. .09 MG ERW 1 10 ML	3,29€	➔	2,10€
	GELOMYRTOL KAPS MAG.RES 300 MG FT 20	8,68€	➔	6,23€
	THOMAPYRIN T.SCHM.CLASS 20	4,99€	➔	3,54€

Total OTC market is slightly growing while mail order channel is driving the growth

Total OTC Market, Retail Pharmacy, Pharmacy Mail Order, Mass Market, Sales m€, Market Share and Growth in %



Source: IMS® International OTCIMS Database

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