

# OTC&FS EXECUTIVE SUMMARY

## 2024 Q4

- 439.9 mn Eur, PPP\*, 5.7% growth rate
- 71.2 mn units, - 1.9%, growth rate

## YEAR 2024

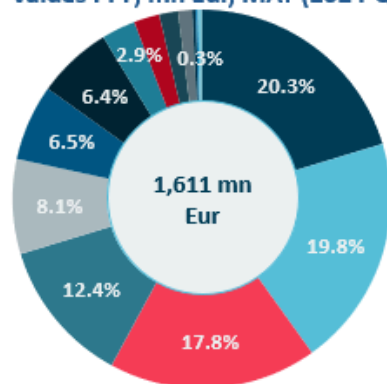
- 1,610.6 mn Eur, PPP\*, 5.7% growth rate
- 264.8 mn units, - 2.3% growth rate

PPP - Pharmacy Purchase Price, w/o VAT  
Growth rates are calculated vs the correspondent period of the previous year

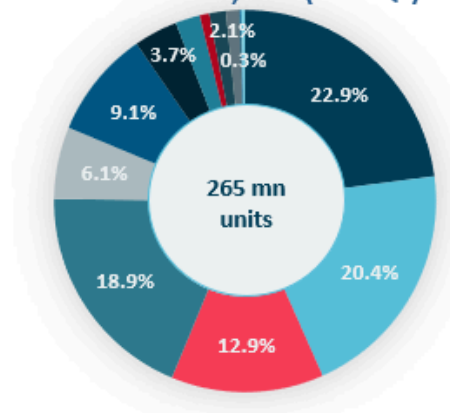


# OTC&FS MARKET BY SEGMENTS

OTC market by segments  
Values PPP, mn Eur, MAT (2024-Q4)

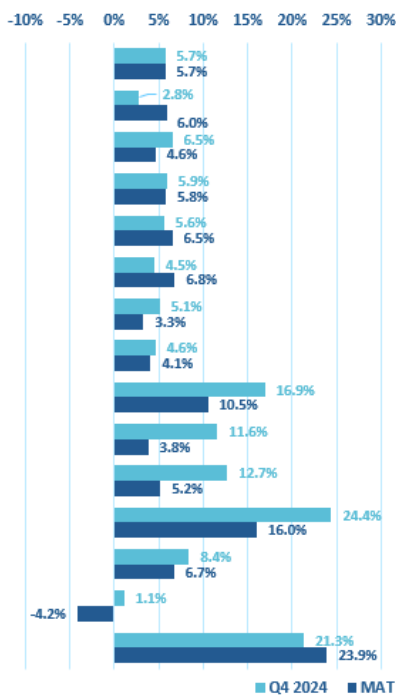


OTC market by segments  
mn units, MAT (2024-Q4)

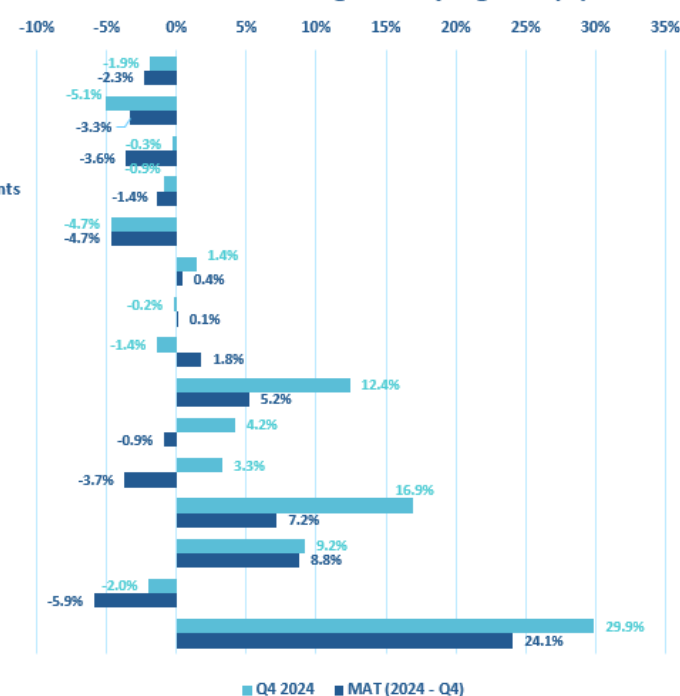


- Cough Cold and Allergy
- Gastrointestinals
- Vitamins Minerals and Supplements
- Analgesics
- Dermatologicals
- Systemic cardiovasculars
- Genito urinary system and sex hormones
- Eye and Ear Care
- Musculoskeletal
- Sleep aids
- Oral care
- Antismoking and alcohol control
- Antiparasitic preparations
- All Others

OTC market PPP Values growth by segment (%)



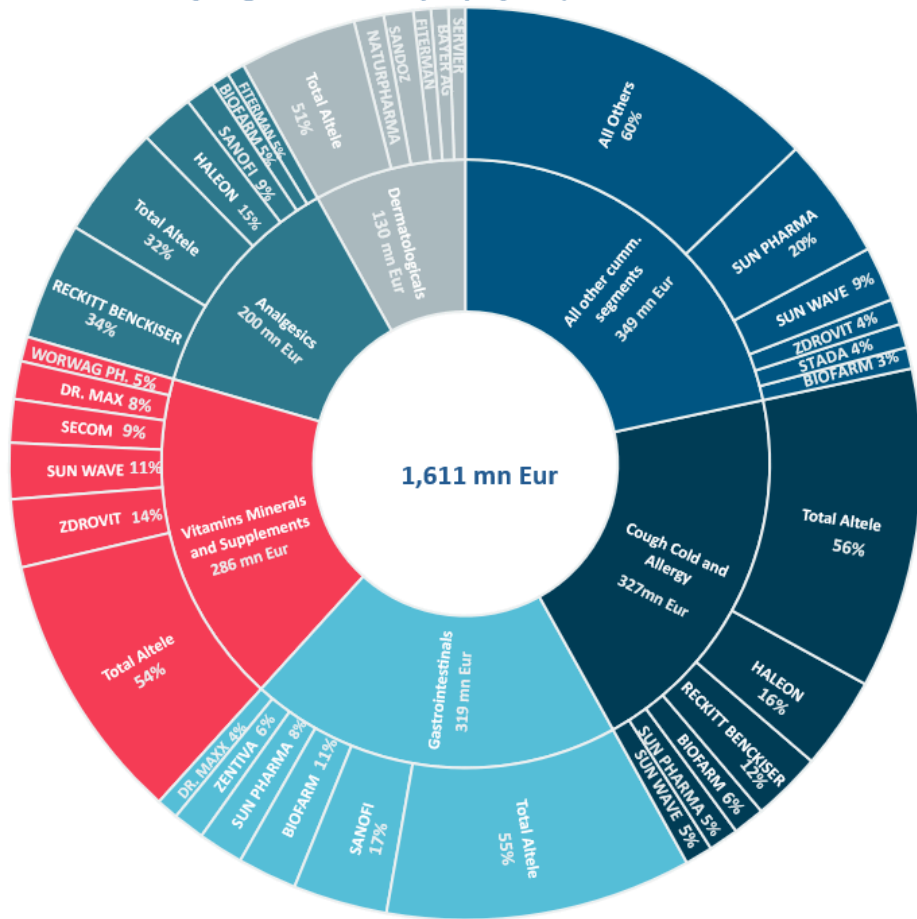
OTC market volume growth by segment (%)



# OTC&FS EXECUTIVE SUMMARY

## TOP 5 CORPORATIONS per SEGMENT

OTC&FS market by segments and Top 5 players (Values PPP, mn Eur YEAR 2024)



## TOP 3 BRANDS per SEGMENT

OTC by categories PRODUCT NAME	2024 - Q4			Year 2024		
	Values PPP mn EUR	MS(%)	Values PPP Growth (% EUR)	Values PPP mn EUR	MS(%)	Values PPP Growth (% EUR)
<b>OTC drugs &amp; Food Supplements</b>	<b>439.9</b>	<b>100%</b>	<b>6%</b>	<b>1,610.6</b>	<b>100%</b>	<b>6%</b>
<i>Cough Cold and Allergy</i>	<b>100.5</b>	<b>23%</b>	<b>3%</b>	<b>326.7</b>	<b>20%</b>	<b>6%</b>
PARASINUS	7.7	8%	-6%	26.7	8%	5%
NUROFEN	7.5	8%	8%	24.4	8%	18%
THERAFLU	5.3	5%	-11%	16.4	5%	4%
<i>Gastrointestinals</i>	<b>83.8</b>	<b>19%</b>	<b>7%</b>	<b>318.7</b>	<b>20%</b>	<b>5%</b>
NO-SPA	4.4	5%	6%	16.3	5%	1%
ESSENTIALE FORTE	2.9	4%	-12%	13.1	4%	6%
LAGOSA	3.3	4%	19%	12.0	4%	6%
<i>Vitamins Minerals and Supplements</i>	<b>79.1</b>	<b>18%</b>	<b>6%</b>	<b>286.0</b>	<b>18%</b>	<b>6%</b>
MAGNEROT	3.2	4%	33%	12.6	4%	5%
MOLEKIN	4.5	6%	27%	10.6	4%	4%
URIMIL	3.0	4%	32%	10.4	4%	31%
<i>Analgesics</i>	<b>53.5</b>	<b>12%</b>	<b>6%</b>	<b>200.0</b>	<b>12%</b>	<b>7%</b>
NUROFEN	17.0	32%	5%	67.3	34%	9%
VOLTAREN	4.4	8%	39%	13.7	7%	13%
ANTINEURALGIC FORTE	3.4	6%	55%	11.0	6%	36%
<i>Dermatologicals</i>	<b>30.6</b>	<b>7%</b>	<b>5%</b>	<b>130.4</b>	<b>8%</b>	<b>7%</b>
CICATRIDINA	4.1	13%	3%	16.8	13%	5%
BETADINE	2.4	8%	7%	9.7	7%	13%
BANEOCIN	1.8	6%	2%	8.6	7%	4%
<i>Systemic cardiovasculars</i>	<b>26.8</b>	<b>6%</b>	<b>5%</b>	<b>104.0</b>	<b>7%</b>	<b>3%</b>
ASPENTER	10.9	41%	10%	41.2	40%	13%
ASPACARDIN	2.8	10%	1%	10.6	10%	0%
EXTRAVALERIANIC BIOFARM CARDIO	1.6	6%	6%	5.9	6%	-14%
<i>Genito urinary system and sex hormones</i>	<b>27.9</b>	<b>6%</b>	<b>5%</b>	<b>103.7</b>	<b>6%</b>	<b>4%</b>
URACTIV	4.5	16%	2%	16.3	16%	9%
MARATON FORTE	2.6	9%	6%	9.4	9%	5%
URINAL	2.0	7%	-16%	8.5	8%	7%
<i>Eye and Ear Care</i>	<b>11.8</b>	<b>3%</b>	<b>17%</b>	<b>45.9</b>	<b>3%</b>	<b>11%</b>
MACUSHIELD	1.3	11%	38%	4.5	10%	37%
VIZIK	1.0	8%	94%	4.0	9%	28%
THEALOS	0.8	6%	1%	2.9	6%	4%
<i>Musculoskeletal</i>	<b>10.0</b>	<b>2%</b>	<b>12%</b>	<b>36.0</b>	<b>2%</b>	<b>4%</b>
SUPRAMAX	1.3	13%	14%	4.4	12%	1%
PROENZI ARTROSTOP	0.9	9%	13%	3.1	9%	5%
MUVON	0.8	8%	21%	3.0	8%	-3%
<i>Sleep aids</i>	<b>6.9</b>	<b>2%</b>	<b>13%</b>	<b>25.1</b>	<b>2%</b>	<b>5%</b>
STRESSCLEAN COMPLEX	1.6	23%	23%	5.4	22%	9%
OPTISOMN	0.9	13%	22%	3.1	12%	11%
SEDATIF PC	0.7	10%	2%	2.9	12%	8%
<i>Oral care</i>	<b>5.5</b>	<b>1%</b>	<b>24%</b>	<b>20.0</b>	<b>1%</b>	<b>16%</b>
TANTUM VERDE	1.7	30%	5%	6.1	31%	2%
TANTUM VERDE FORTE	1.0	18%	18%	3.5	18%	17%
CAMILIA	0.5	9%	34%	1.8	9%	48%
<i>Antismoking and alcohol control</i>	<b>1.3</b>	<b>0%</b>	<b>8%</b>	<b>5.2</b>	<b>0%</b>	<b>7%</b>
DEFUMOXAN	0.6	49%	-3%	2.8	53%	1%
NICORETTE	0.6	46%	19%	2.2	43%	5%
EMETIX HANGOVER	0.1	5%	105%	0.2	4%	79%
<i>Antiparasitic preparations</i>	<b>0.9</b>	<b>0%</b>	<b>1%</b>	<b>3.1</b>	<b>0%</b>	<b>-4%</b>
WORMEX	0.4	44%	4%	1.4	44%	-1%
PARANIX	0.2	24%	-18%	0.7	23%	-27%
DR. MAX LOSINIT	0.1	6%	23%	0.2	7%	53%
<i>All Others</i>	<b>1.5</b>	<b>0%</b>	<b>21%</b>	<b>5.6</b>	<b>0%</b>	<b>24%</b>