OTC Market Trends

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PharmaSynergy – OTC
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Global

100,000+ Employees

100+ Countries

Neutral

Company listed on the NYSE

Universal

Data on brick-and-mortar pharmacies, mail-order pharmacies, hospitals, physicians, patients, and consumers

#1

Health Care: "Pharmacy & Other Services"

Inclusive, open, and agile culture

#1

Global

- Clinical research
- Information and data

#3

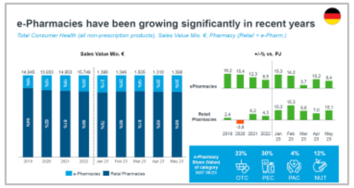
Europe

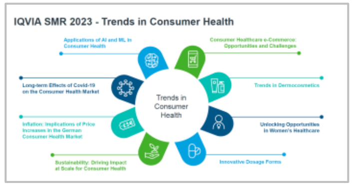
"Best consulting firms in Europe for Healthcare"

Our Clients

- Pharma
- Consumer Health
- MedTech
- Emerging Biopharma
- Weitere

Thought Leadership





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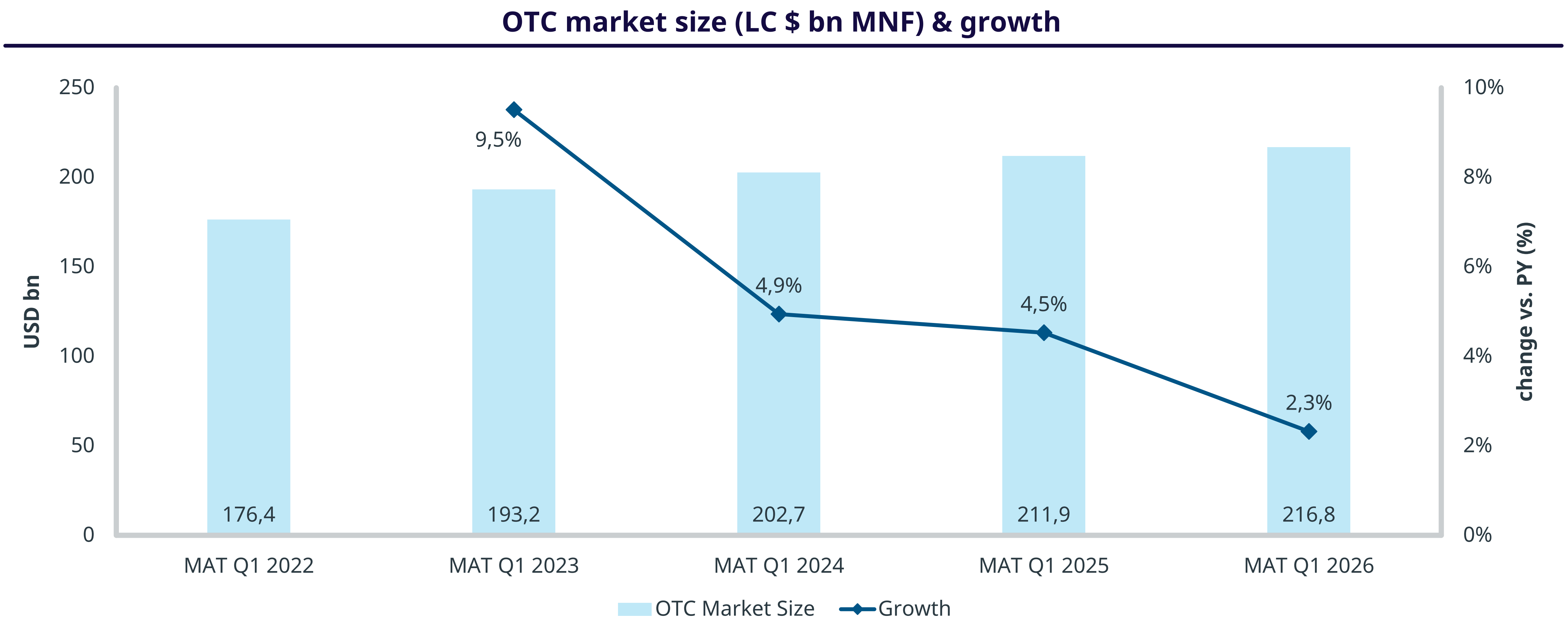
Global OTC performance

Global OTC market evolution: MAT Q1 2026

Sustained expansion of the OTC market; growth rate tempered due to volume decline



Source: IQVIA Global OTC Insights plus estimates of e-Commerce & Mass-market (Excluding Venezuela)

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Key trends

Six trends are reshaping the Consumer Health market – Across categories and distribution

Category trends

1 **Longevity**
Respond to the shift from disease treatment to prevention and healthspan management

2 **Obesity**
Leverage GLP-1 as game changers in the healthcare industry

3 **Women's Health**
Unlock growth in historically underserved areas with high unmet need

Distribution trends

4 **eCommerce**
Manage fast growing channels like ePharmacies, DTC and Amazon

5 **Ecosystems**
Partner across healthcare, technology and retail to deliver integrated solutions beyond the drug

6 **Brand Fostering**
Ensure faster and more cost-effective product launches and geo expansion through full-service outsourced distribution

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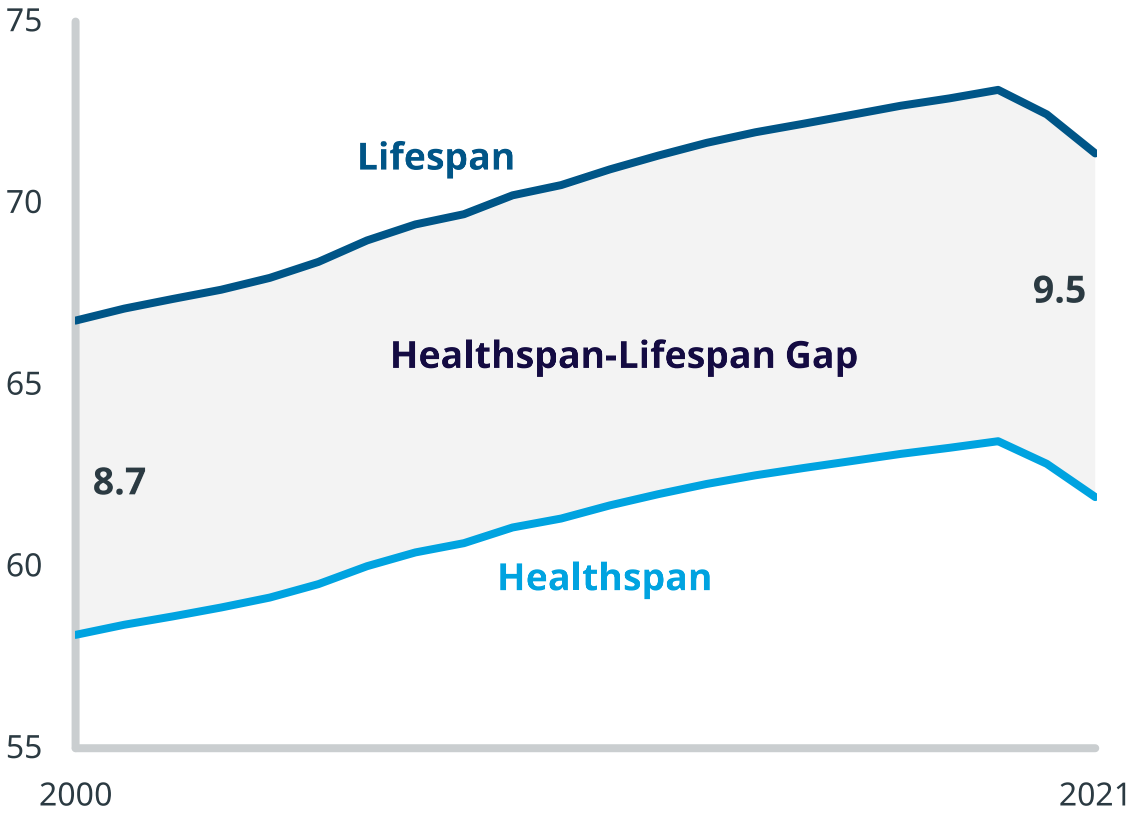
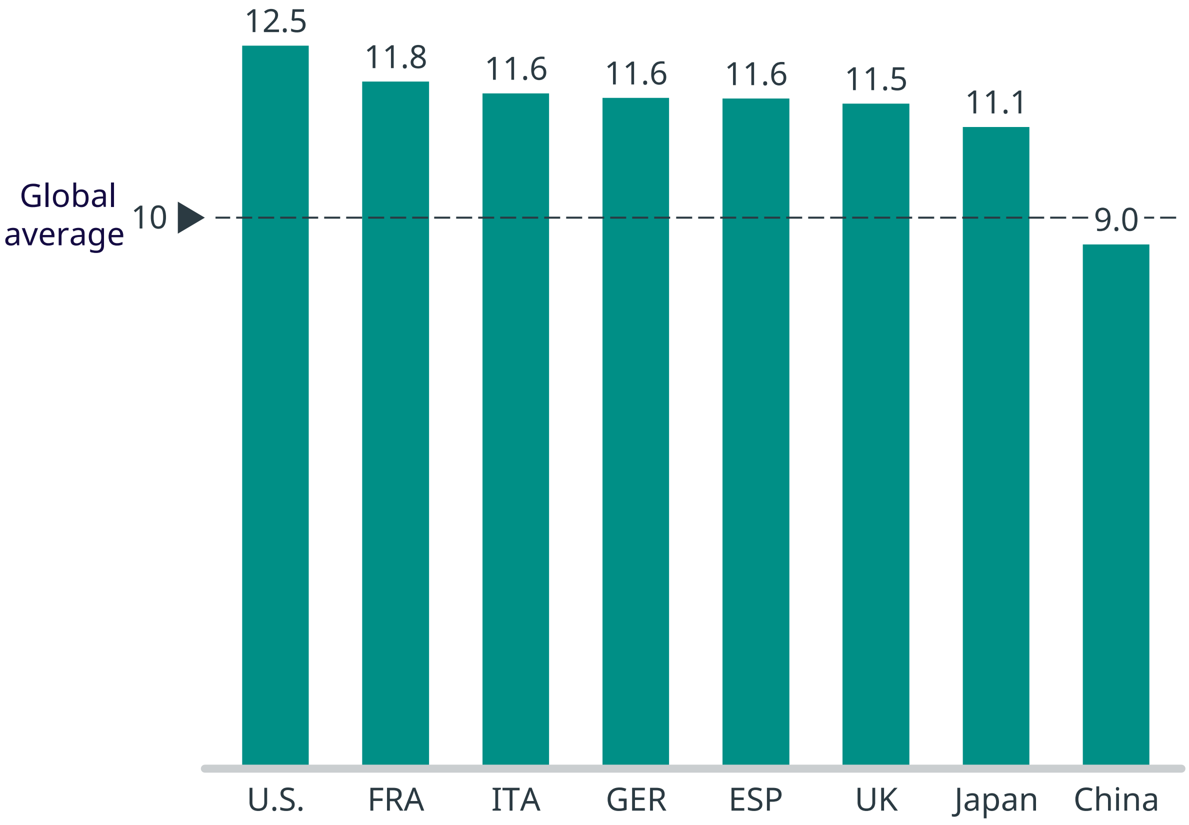
Longevity

Mind the Gap: Healthspan vs. Lifespan

Global Healthspan and Lifespan at Birth
2000-2021, years



Healthspan-Lifespan Gap
selected countries, years



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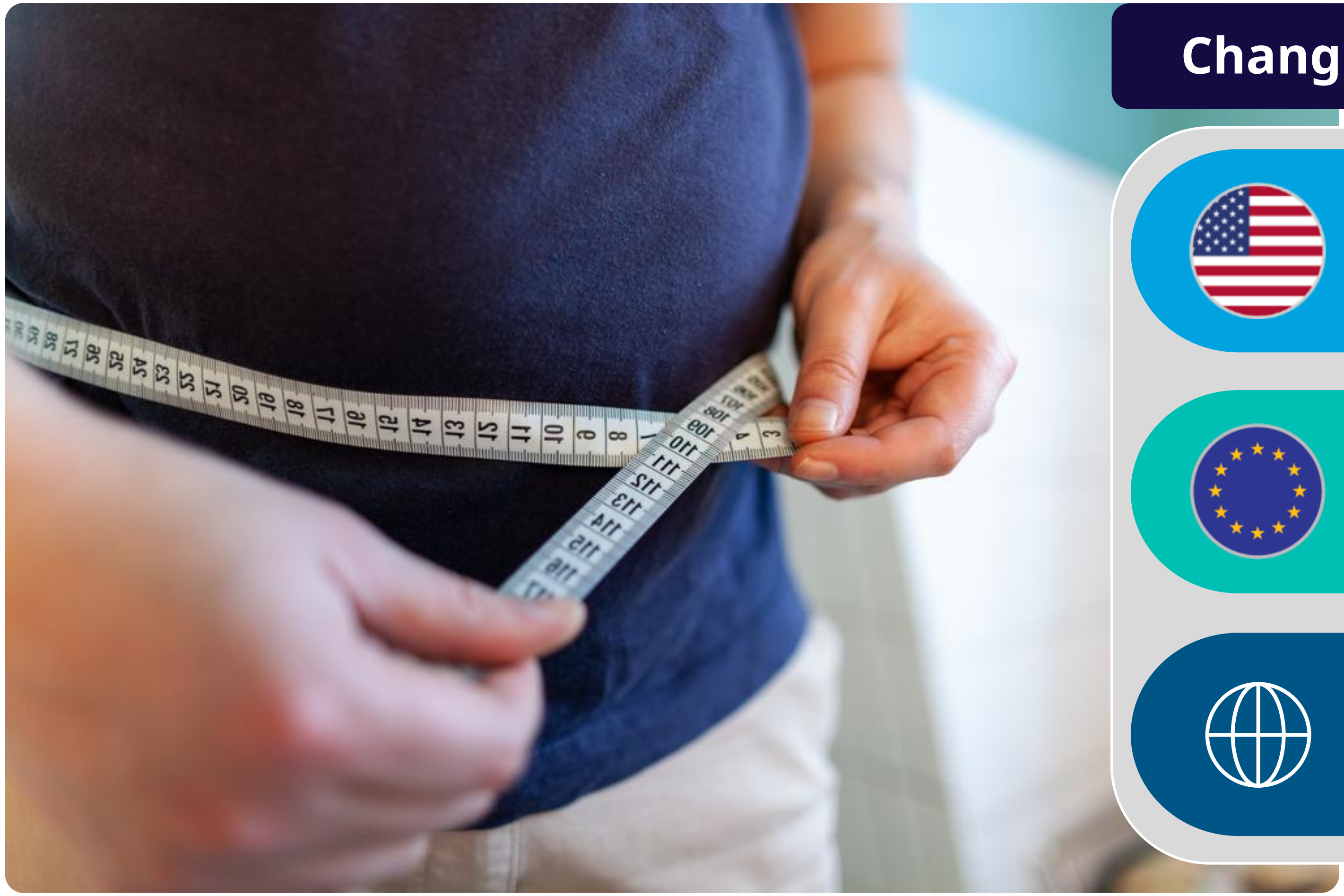
Obesity

For decades, obesity has been treated as a clinical condition

Obesity has become a global burden of modern prosperity, a consequence of abundance, convenience, and lifestyle



Change Prevalence Obesity 1990 – 2022*

USA	**51%**	**>**	**72%**
EUROPE	**46%**	**>**	**56%**
WORLD	**25%**	**>**	**43%**

Sources: NCD RisC, accessed March 2026: [National Adult BMI > Data Download > NCD-RisC]

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Women's Health

Women’s health is emerging as a strategic growth opportunity

Why women are a highly relevant target group

Underserved target group

- Large **untapped potential** with significant revenue opportunities
- **Menopause** was a long-neglected market and is now growing rapidly

Innovative growth market

- Strong momentum in **FemTech** and personalized medicine
- Increasing openness around topics like **fertility** and **hormonal health**

Health decision-makers

- Women make **most family health decisions**, amplifying their impact beyond individual care
- Improving women’s health knowledge **affects the whole family**

Gender-specific medicine

- Women can show **different disease patterns**, requiring tailored therapeutic approaches
- Integrating gender-specific insights enables **better treatments** and creates a competitive advantage in development and positioning

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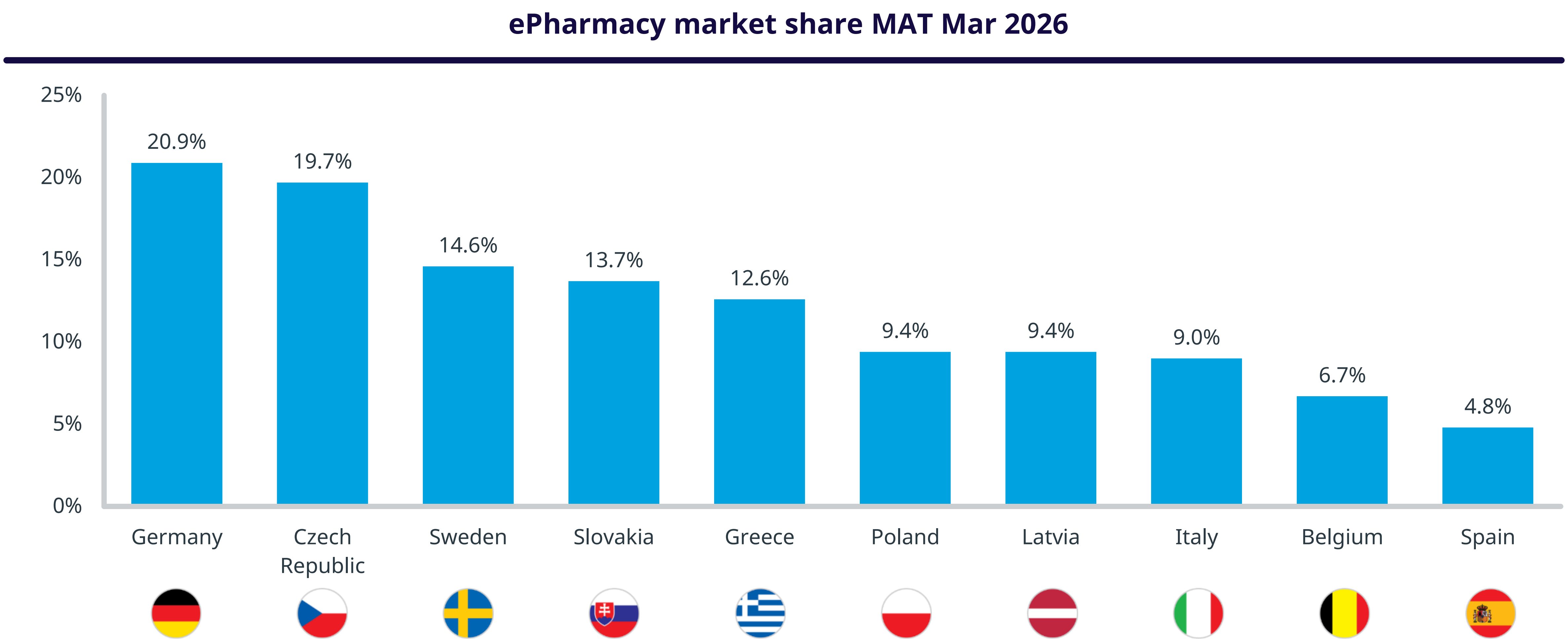
eCommerce

Germany has the highest ePharmacy market share closely followed by Czech Republic

Consumer Health ePharmacy market in Europe



Source: IQVIA ePharmacy data, Audited Value

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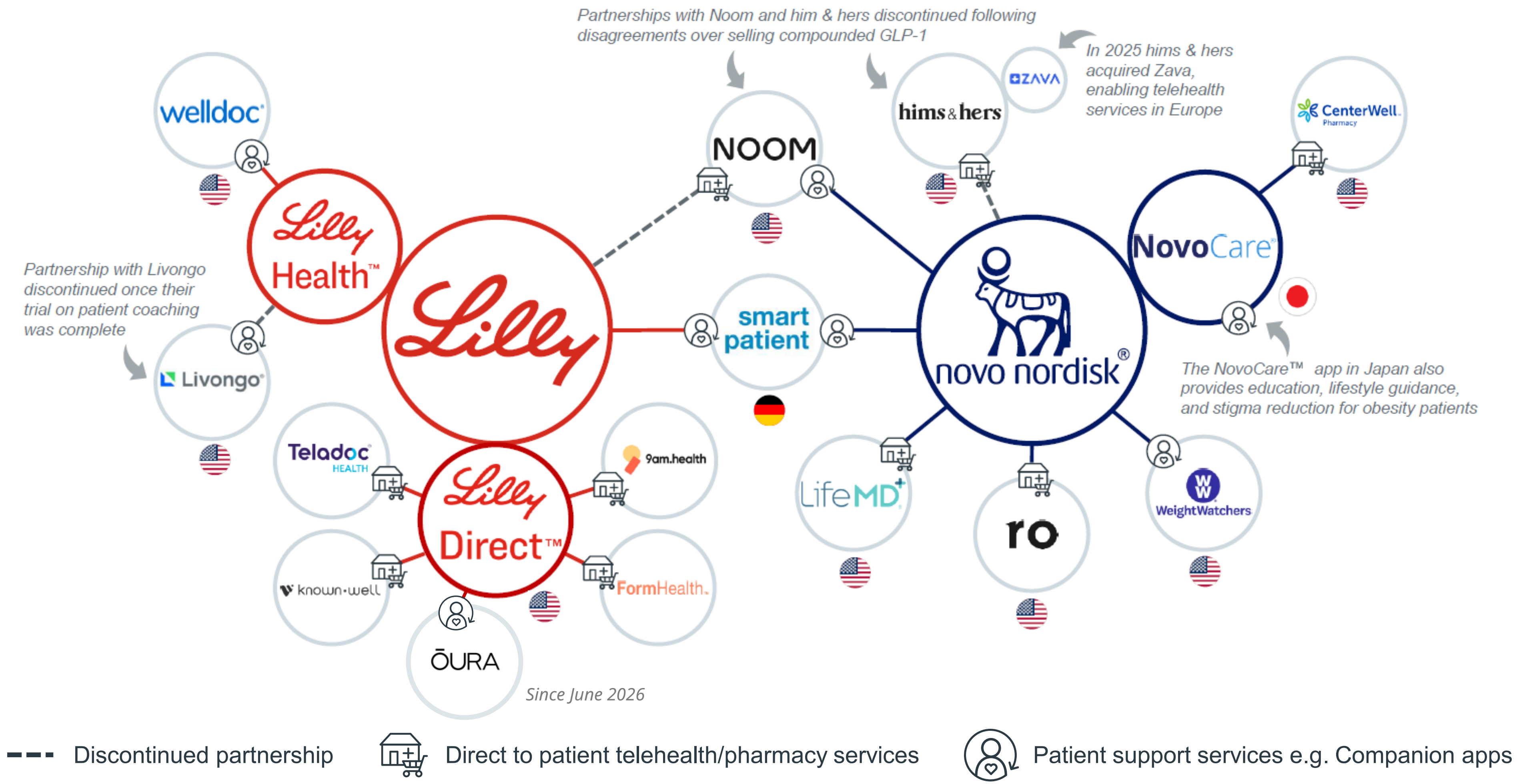
Ecosystems

GLP-1 manufacturers support their obesity offerings with a range of digital patient support and online pharmacy/access services

Consumer-centric digital health and patient support to control the patient journey



Source: IQVIA Consulting

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Brand Fostering

Four market dynamics are driving manufacturers and brand owners to pursue end-to-end outsourcing partnerships

Portfolio dynamics

1

Tail and legacy brands

OTC manufacturers increasingly look to manage brands with untapped potential more effectively outside their core focus

2

Rx-to-OTC switches

A growing pipeline of switch brands requires consumer marketing expertise beyond established Rx capabilities

Growth and ownership dynamics

3

Market entry and channel expansion

More and more brands need entry into new geographies and expansion across pharmacy, retail and eCom channels

4

Private equity portfolios

Investors seek lean, scalable brand management to grow assets without building fixed infrastructure

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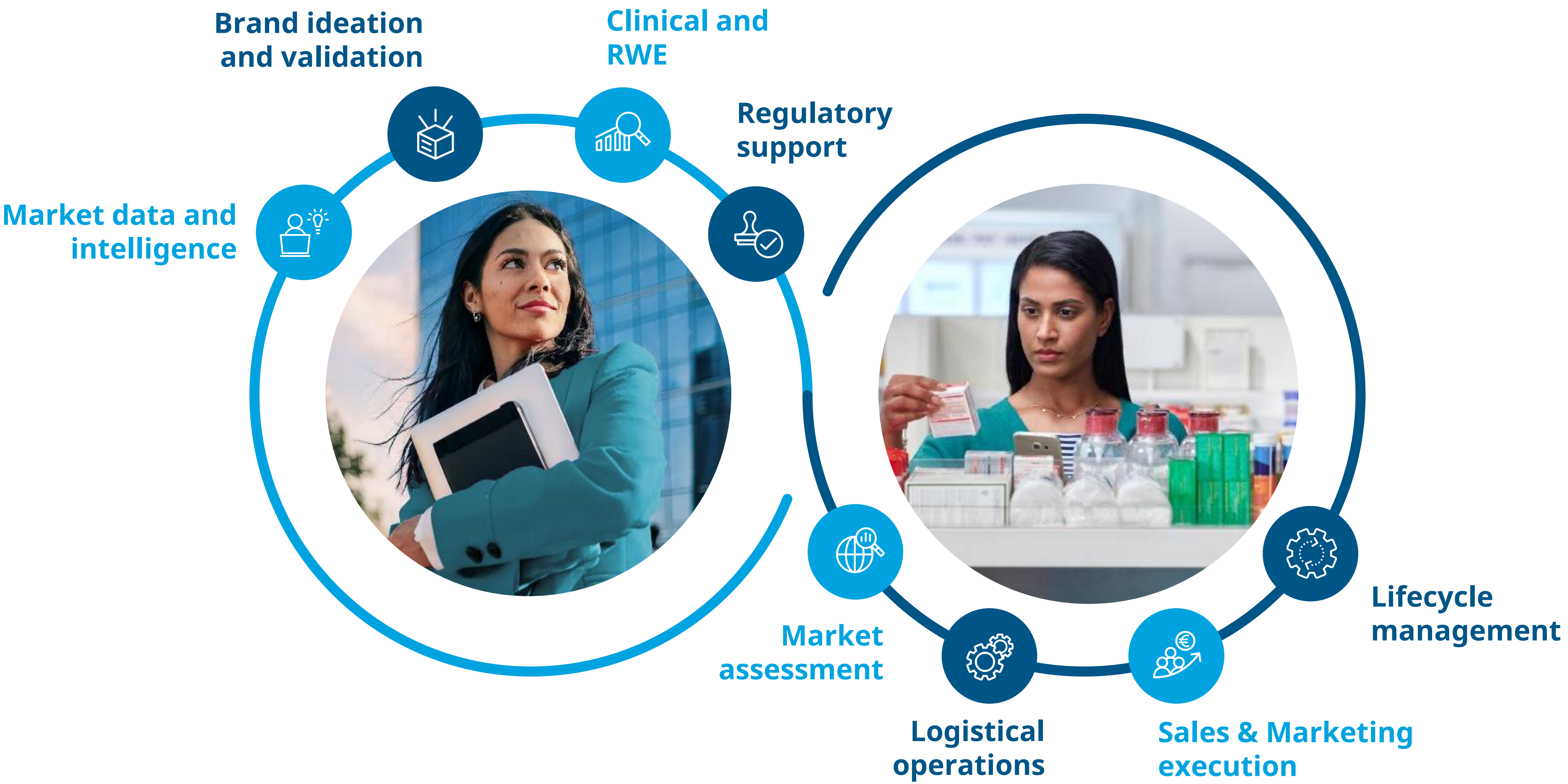
Ideally, find one partner, e.g., IQVIA, for all your needs regarding product launches and geo expansion – Brand Fostering



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For access to the full presentation, please do not hesitate to contact me

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Thank you

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