

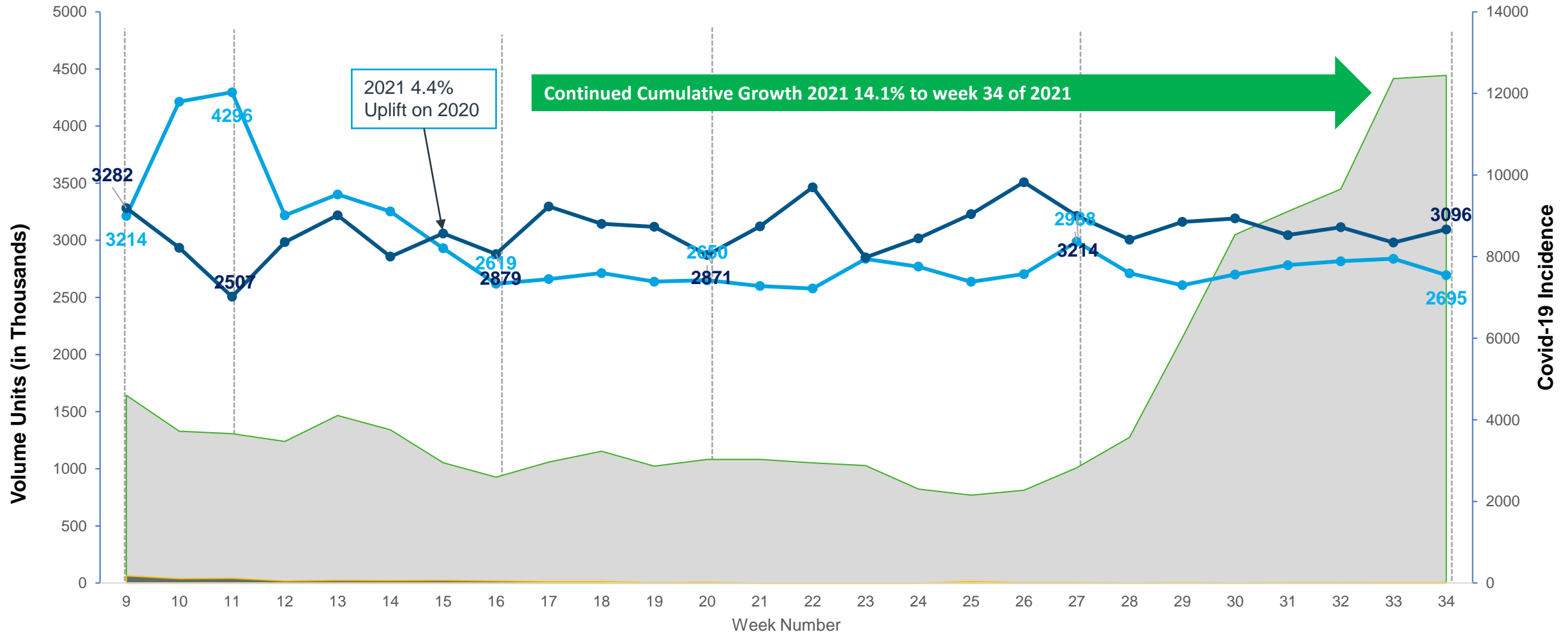


Consumer Health: ECR Shopper Insights

Gwynne Morley, General Manager, IQVIA
Fergus McCauley, Pharmacy KAM, IQVIA
21st October 2021

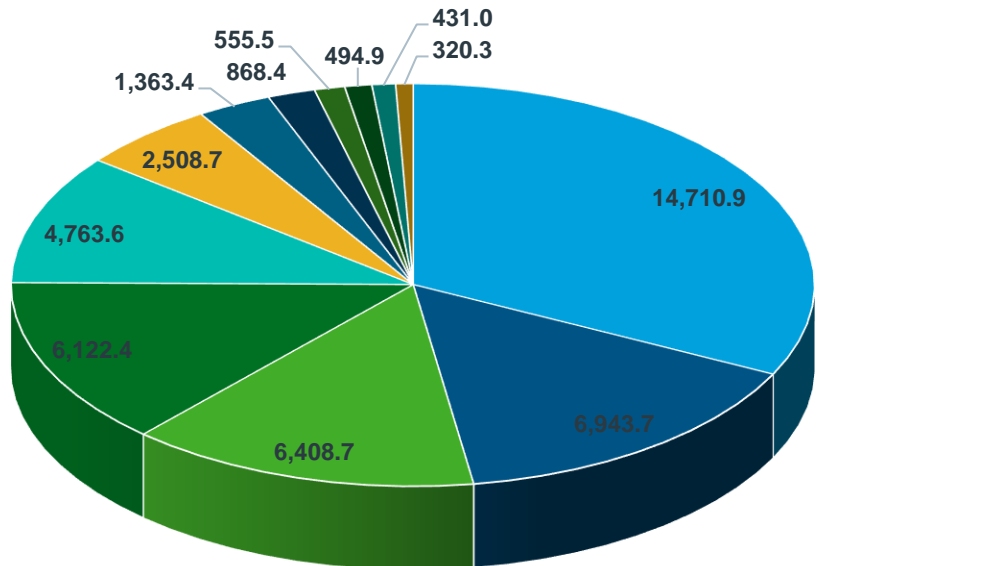
Weekly Market Volume Trend - Total Irish Pharma Market MAT August 2021

Vs Previous Year



Top Selling OTC Products/Categories by Volume MAT August 2021

**IRELAND OTC UNITS
MAT/8/2021
(Thousands) 46019**

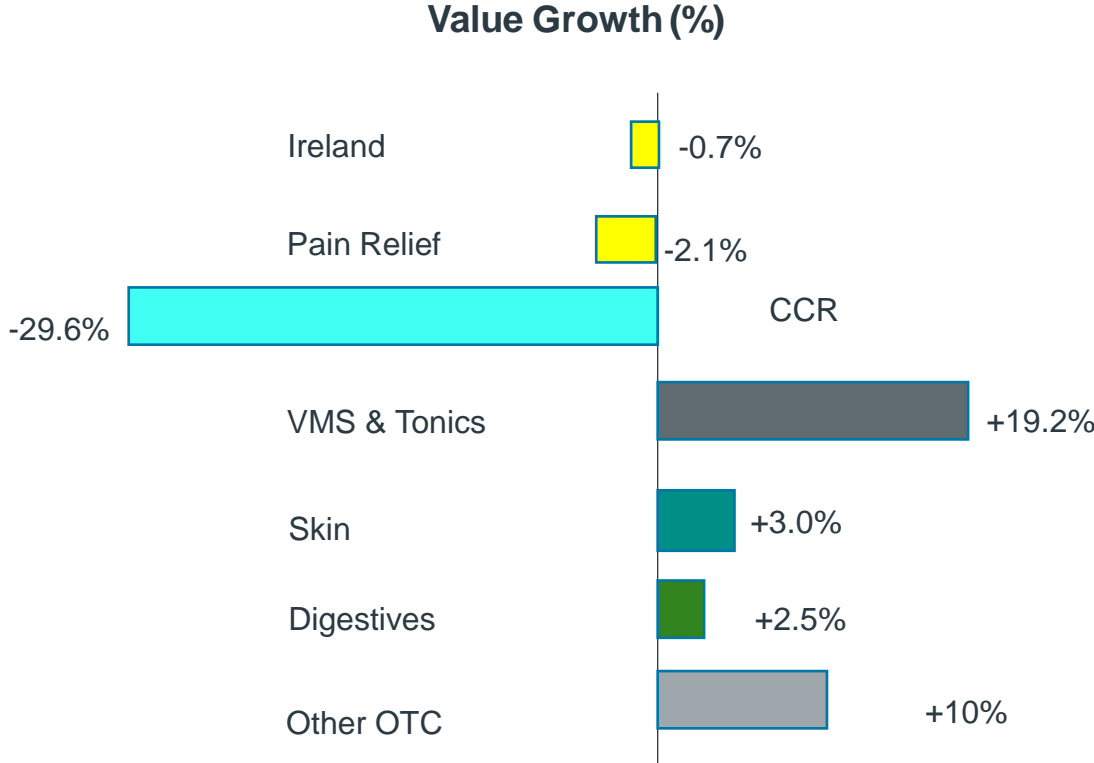
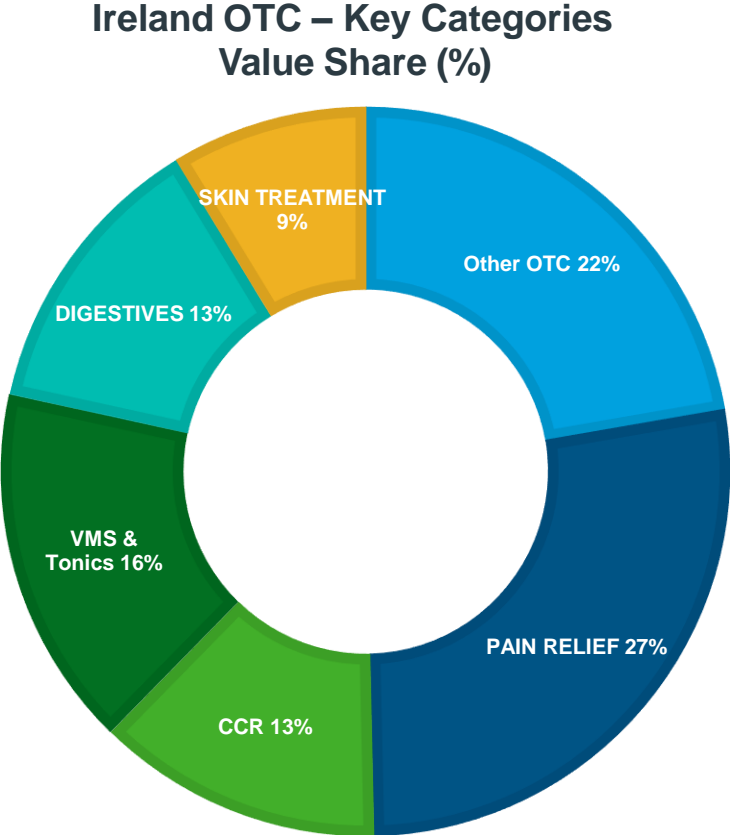


- 02 PAIN RELIEF
- 04 VIT. MIN. & NUTRIT. SUPPS
- 06 SKIN TREATMENT
- 17 HABIT TREATMENT
- 09 MOUTH TREATMENT PRODUCTS
- 10 CIRCULATORY PRODS.
- 01 COUGH COLD&OTH RESP PROD
- 03 DIGEST & OTH INTEST PROD
- 07 EYE CARE
- 12 URINARY AND REPRODUCT CAR
- 13 CALM/SLEEP&MOOD ENHANC PD
- 08 EAR CARE

Ireland OTC MAT August 2021	UN MAT/8/2021 (Thousands)	UN MAT/8/2021 %PPG Previous Year (Absolute)
ROI OTC	46019.846	-6%
PAIN RELIEF	14,710.9	-5%
COUGH COLD&OTH RESP PROD	6,943.7	-34%
VIT. MIN. & NUTRIT. SUPPS	6,408.7	15%
DIGEST & OTH INTEST PROD	6,122.4	-2%
SKIN TREATMENT	4,763.6	2%
EYE CARE	2,508.7	2%
HABIT TREATMENT	1,363.4	-1%
URINARY AND REPRODUCT CAR	868.4	19%
MOUTH TREATMENT PRODUCTS	555.5	6%
CALM/SLEEP&MOOD ENHANC PD	494.9	89%
CIRCULATORY PRODS.	431.0	40%
EAR CARE	320.3	10%

OTC Market & Five Key Categories MAT July 2021

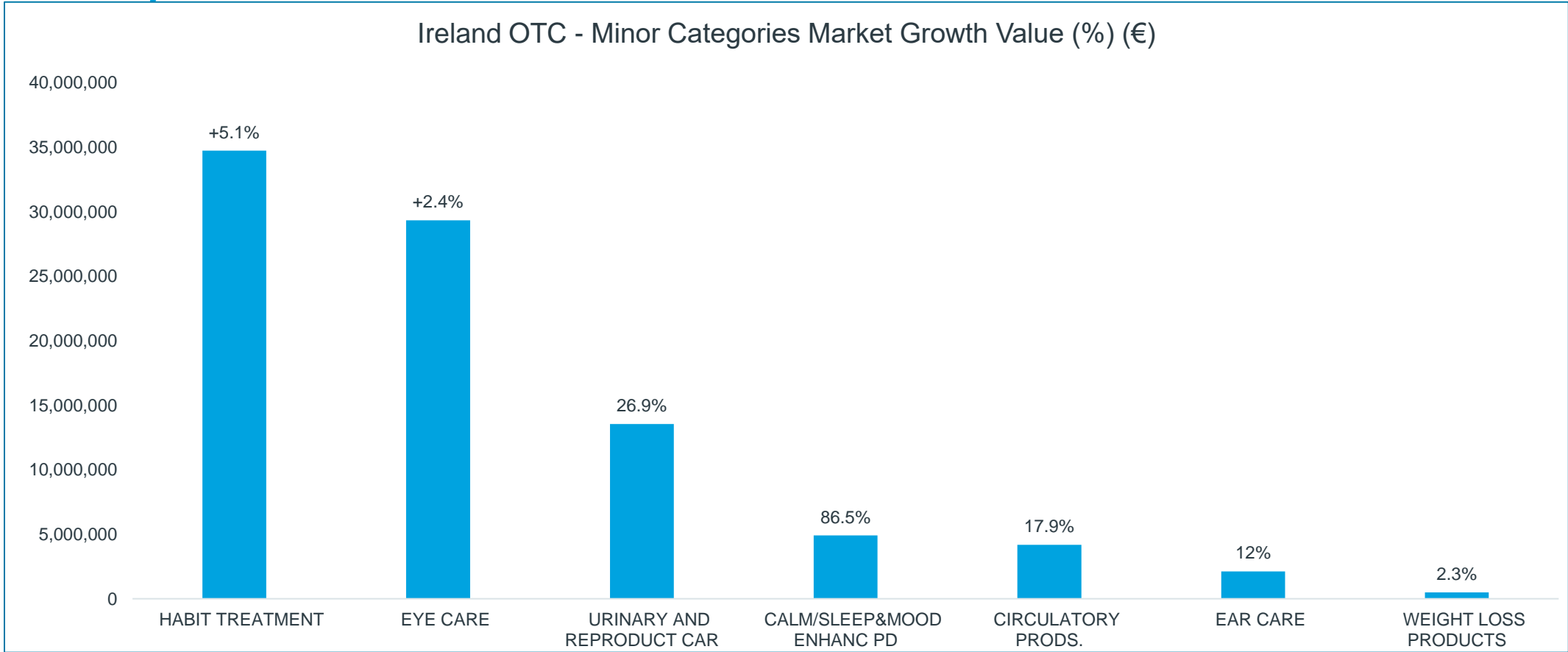
VMS and Pain surpassed Ireland growth



Source: IQVIA Ireland OIRMTM MAT July 2021

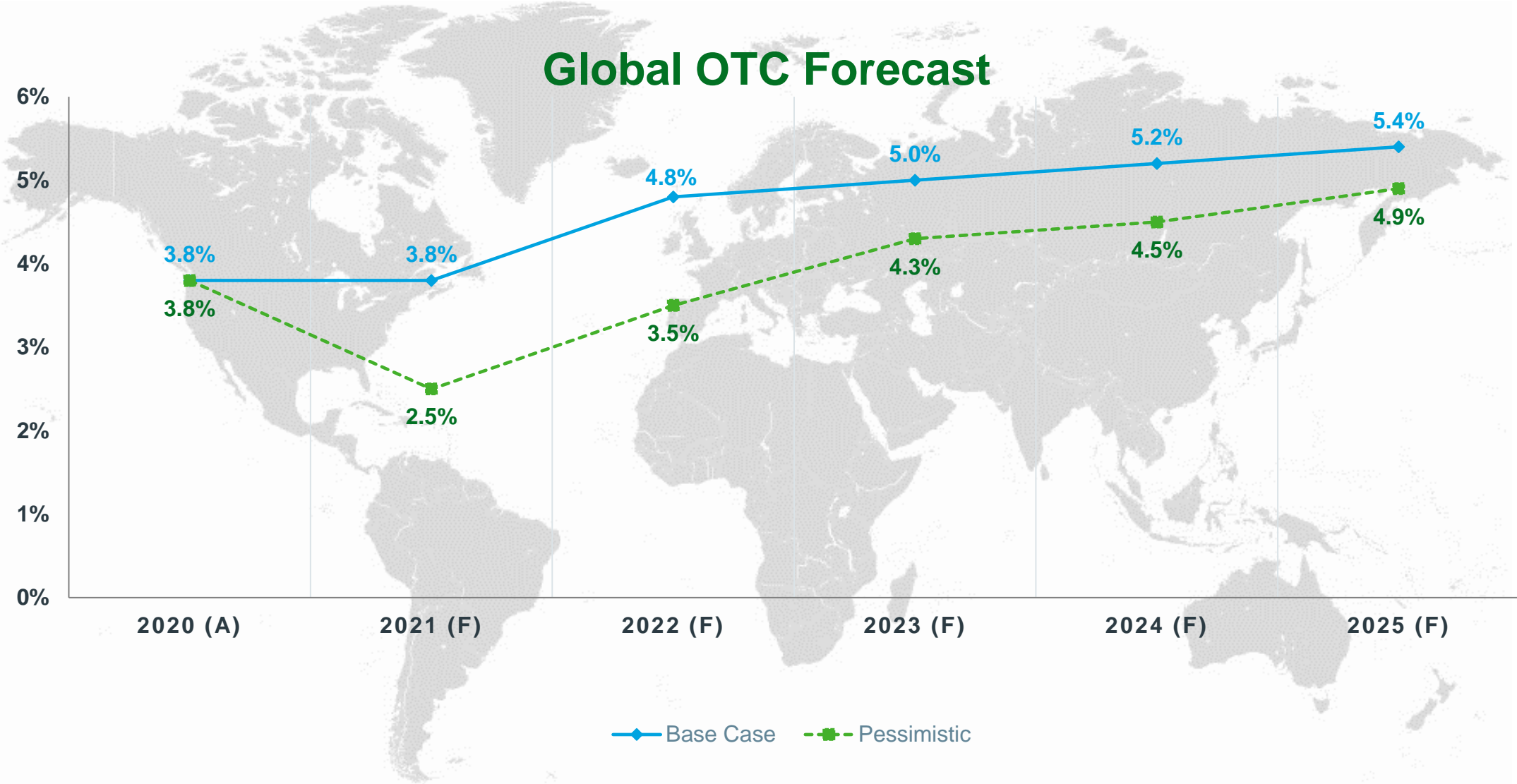
In the minor OTC Categories evidence of an increasing trend of self care

Calming/Sleeping/Mood category continued to grow exponentially due to the stress from Covid impact



Source: IQVIA Ireland OIRMTH MAT July 2021

Global OTC market is expected to maintain growth at +3.8% in a base case scenario and +2.5% in a Pessimistic scenario in 2021



Thank You

