

The background of the slide is a photograph of a pharmacy aisle. On the left, there are tall white shelves filled with various pharmaceutical products. In the center, a robotic arm is visible, extending from a track system. On the right, more shelves are visible, also filled with products. The lighting is bright and even. The overall scene is clean and organized.

Pharmacy Market Watch

May 2026

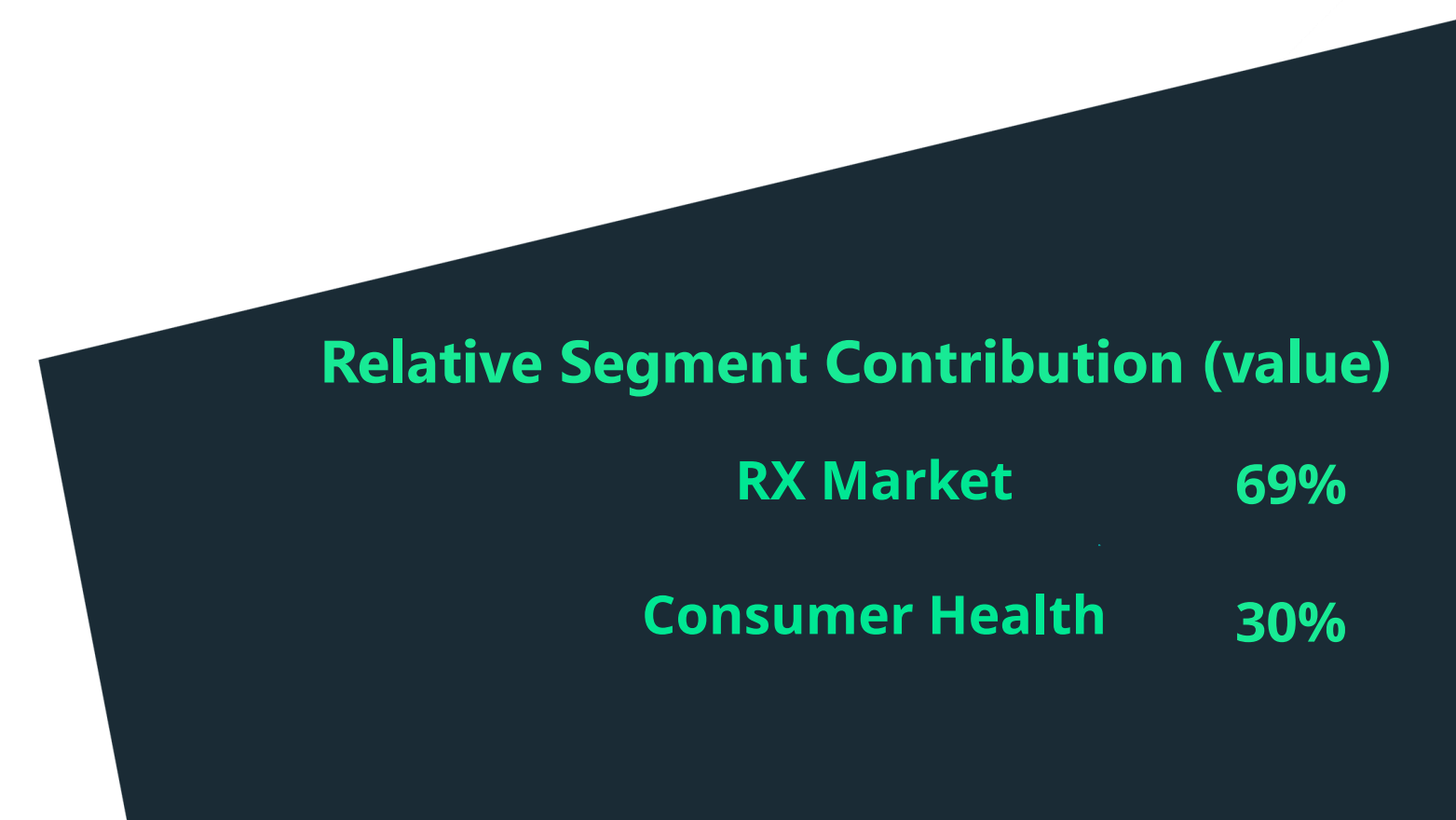
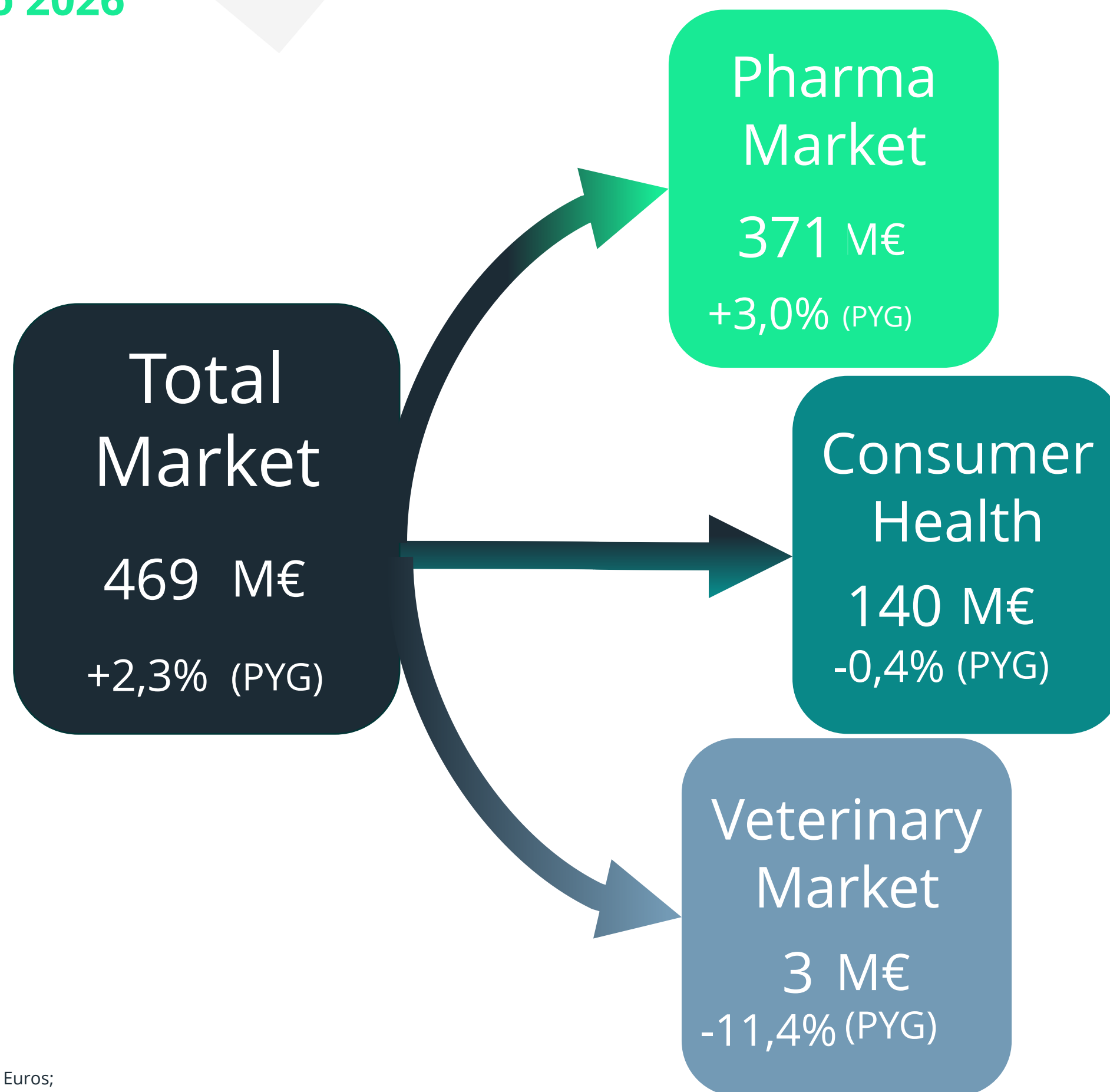
Marketing Team

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Knowledge for better health

Pharmacy Total Market – Sell out Value

Mês Maio 2026

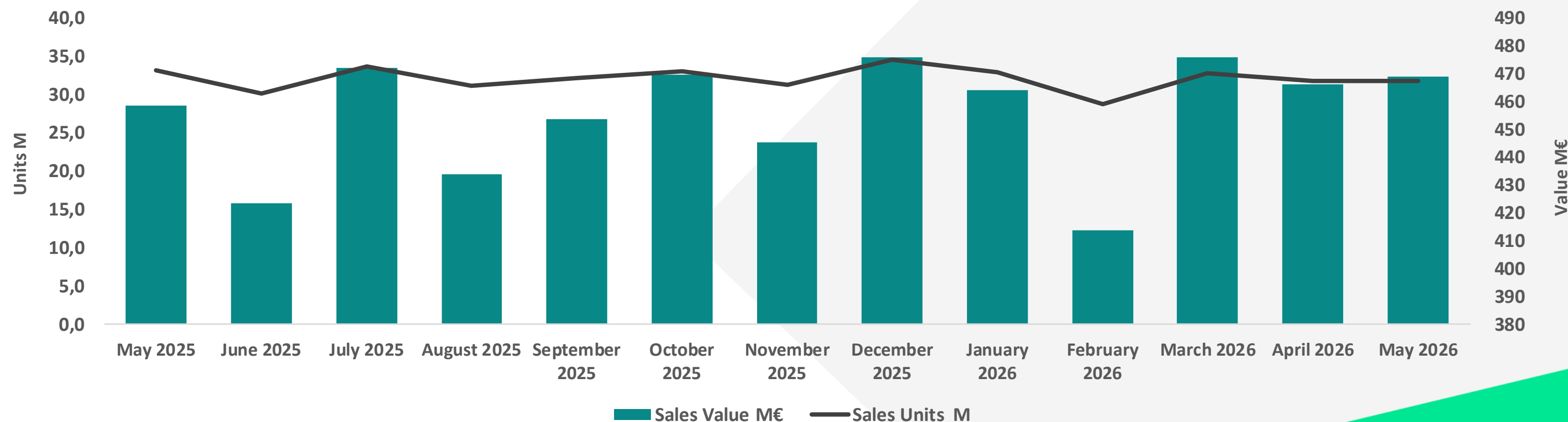


Sell Out Values - Million Euros;
PYG% - Previous Year Growth of the most recent month.

Pharmacy Total Market – Sell out Value and Units

Mês Maio 2026

Monthly Evolution Sell Out - Value (M.€) and Units (M.)



There is a variation in sales in the last month, compared to the same month of the previous year of 2,3% and -4,0% in value and units, respectively.

Pharma Market - Values and Units

Mês Maio 2026

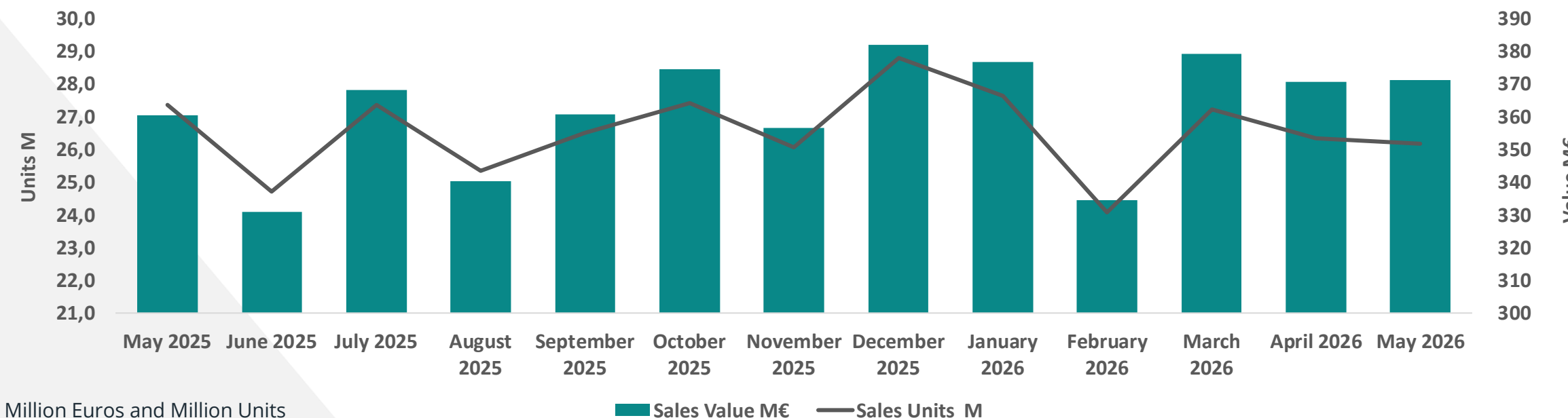
Top 5 ATC3 with the most competitive dynamics

Rank Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1	A10S - Agonista do GLP-1	12,34 M€	65,0%
2	A08A - Preparações anti-obesidade excluindo produtos dietéticos	1,93 M€	116,8%
3	A10P - Antidiabéticos inibidores do co-transportador de sódio e glucose 2 (SGLT2)	1,72 M€	5,8%
4	C10C - Associações entre reguladores de lípidos	0,98 M€	10,4%
5	N06B - Psicoestimulantes	0,82 M€	30,2%

Top 5 products with higher performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Mounjaro	11,47 M€	133,6%
2	Wegovy FlexTouch	2,36 M€	286,5%
3	Ozempic	2,19 M€	53,5%
4	Eliquis	1,51 M€	19,5%
5	Elvanse	0,65 M€	35,5%

Total Pharma Market - Sell Out - Value (M.€) and Units (M.)



Sell Out Values and Units- Million Euros and Million Units
PYG% - Previous Year Growth of the most recent month.

May 2026

Sales Units PYG% -4,4%

Sales Value PYG% 3,0%

Branded Pharma Market – Values

Mês Maio 2026

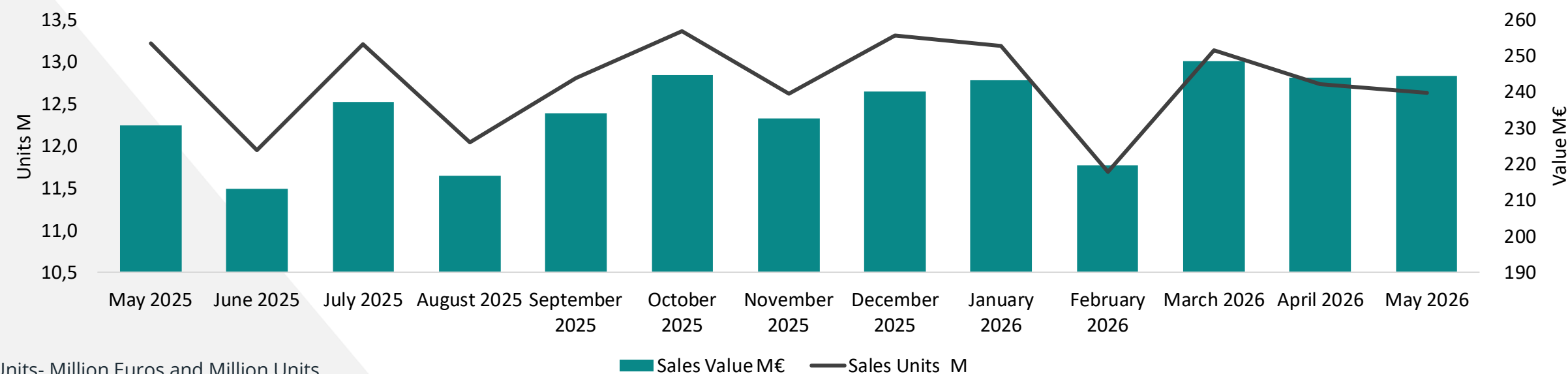
Top 5 ATC3 with the most competitive dynamics

Rank Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1	A10S - Agonista do GLP-1	12,34 M€	65,0%
2	A08A - Preparações anti-obesidade excluindo produtos dietéticos	1,93 M€	118,8%
3	A10P - Antidiabéticos inibidores do co-transportador de sódio e glucose 2 (SGLT2)	1,68 M€	5,7%
4	B01F - Inibidores directos do Factor Xa	1,40 M€	10,1%
5	N06B - Psicoestimulantes	0,76 M€	32,9%

Top 5 products with higher performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Mounjaro	11,47 M€	133,6%
2	Wegovy FlexTouch	2,36 M€	286,5%
3	Ozempic	2,19 M€	53,5%
4	Eliquis	1,51 M€	19,5%
5	Elvanse	0,65 M€	35,5%

Branded Market - Sell Out - Value (M.€) and Units (M.)



Sell Out Values and Units- Million Euros and Million Units
PYG% - Previous Year Growth of the most recent month.

May 2026

Sales Units PYG%	-4,4%
Sales Value PYG%	5,9%

Generic Market – Units

Mês Maio 2026

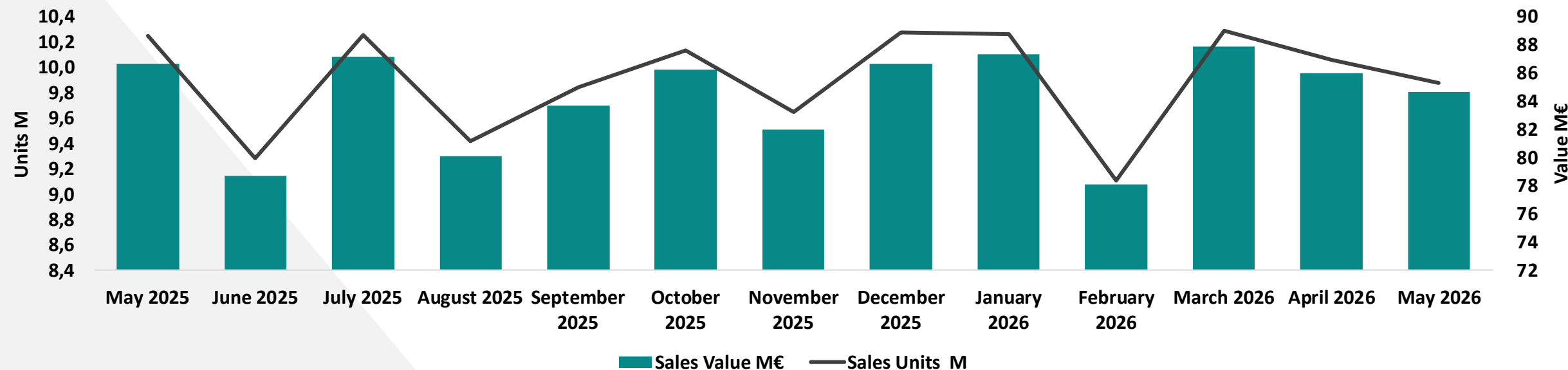
Top 5 DCI with the most competitive dynamics

Rank Var. Abs.	DCI	Var. Abs. Unid (K)	Var. PYG%
1	Atorvastatina + Ezetimiba	27,60 K	165,7%
2	Furosemida	27,42 K	42,7%
3	Duloxetina	13,49 K	19,2%
4	Prednisolona	11,00 K	-
5	Bilastina	10,62 K	6,5%

Top 5 products with higher performance

Rank Var. Abs.	Product	Var. Abs. Unid (K)	Var. PYG%
1	Sertralina Generis (MG)	45,53 K	-
2	Ramipril Romace (MG)	24,93 K	-
3	Atorvastatina toLife (MG)	16,30 K	1084,9%
4	Atorvastatina Aurobindo (MG)	15,15 K	25,9%
5	Bilastina Allerzin (MG)	13,08 K	-

Generic Market - Sell Out - Value (M.€) and Units (M.)



May 2026

Sales Units PYG% **-3,6%**

Sales Value PYG% **-2,3%**

Sell Out Values and Units- Million Euros and Million Units
 PYG% - Previous Year Growth of the most recent month.

Consumer Healthcare Market – Values

Mês Maio 2026

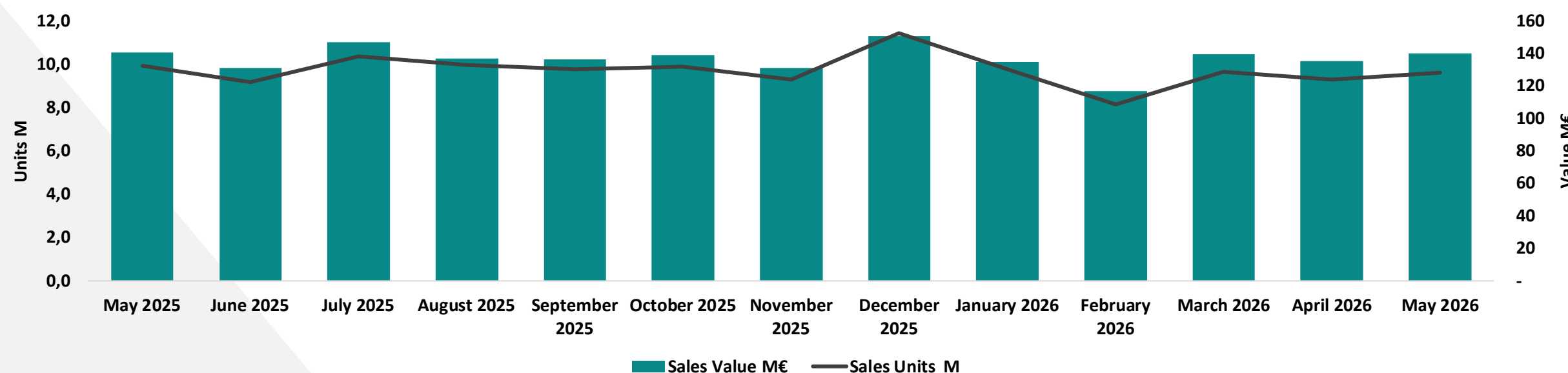
Top 5 HMR 3 with the most competitive dynamics

Rank Var. Abs.	HMR3	Var. Abs. M€ PYG	Var. PYG%
1	H26.4.12. - Medição de glicose contínua	1,30 M€	21,5%
2	H05.4.1. - Suplementos Magnésio	0,51 M€	21,7%
3	H04.2.5. - Antidiarreicos	0,28 M€	15,8%
4	H14.6.1. - Leite Regular	0,15 M€	37,9%
5	H13.2.5. - Suplemento hiperproteico e hipercalórico	0,14 M€	28,9%

Top 5 products with higher performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Dexcom G7	0,74 M€	481,0%
2	Medtronic Guardian 4	0,48 M€	98,2%
3	Theahyabak	0,30 M€	-
4	Uriage Xemose C8+	0,28 M€	-
5	Ben-u-gripe	0,22 M€	-

Consumer Health Market - Sell Out - Value (M.€) and Units (M.)



May 2026

Sales Units PYG% -3,4%

Sales Value PYG% -0,4%

Sell Out Values and Units- Million Euros and Million Units
PYG% - Previous Year Growth of the most recent month.

Consumer Health Segments Performance - Mês Maio 2026

Top 5 products with higher performance

OTC

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	- 713.928 €	-1,5%	4,3%
1	Ben-u-gripe	220.494 €	-	
2	Bilastina Allerzin (MG)	144.552 €	-	
3	Sildenafil Desay (MG)	110.083 €	-	
4	Bioflavonóides Vasoflon	90.926 €	-	
5	Pankreoflat	90.906 €	121,3%	7,3%

Supplements

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	323.447 €	1,3%	3,3%
1	Magnesium-OK Mulher 50+	143.621 €	167,8%	39,1%
2	ZzzQuil Sono	116.879 €	681,0%	4,4%
3	Pure Encapsulations Magnésio	96.970 €	215,1%	5,6%
4	ZzzQuil Sono Forte	80.091 €	185,7%	-11,9%
5	Fisiogen Ferro Forte	78.730 €	22,1%	2,4%

Personal Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	- 1.546.957 €	-5,1%	-0,8%
1	Uriage Xemose C8+	275.301 €	-	
2	Cicaplast Baume B5+	64.808 €	45,3%	4,2%
3	Lipikar Baume AP+Max	61.805 €	-	
4	Hyalu B5	51.291 €	76,4%	3,1%
5	Isdin Coverage	51.150 €	-	

Sell Out Values and Units- Million Euros and Million Units
PYG% - Previous Year Growth of the most recent month.

Consumer Health Segments Performance - Mês Maio 2026

Top 5 products with higher performance

Patient Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	877.107 €	2,6%	3,8%
1	Dexcom G7	739.092 €	481,0%	0,0%
2	Medtronic Guardian 4	475.946 €	98,2%	0,1%
3	Theahyabak	295.391 €	-	
4	Tandem AutoSoft 90	203.256 €	266,4%	0,0%
5	Medtronic MiniMed Quick-set	175.985 €	174,7%	0,0%

Nutrition

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	556.242 €	12,5%	0,3%
1	Meritene Clinical Diabet	69.241 €	-	
2	Meritene Clinical Extra Protein	57.909 €	66,9%	0,6%
3	Fresubin Protein Energy Drink	45.320 €	79,1%	2,1%
4	Meritene Clinical Protein 1.25	43.429 €	-	
5	Aptamil Profutura 1 Duo	41.530 €	68,3%	0,9%

Veterinary Market – Values

Mês Maio 2026

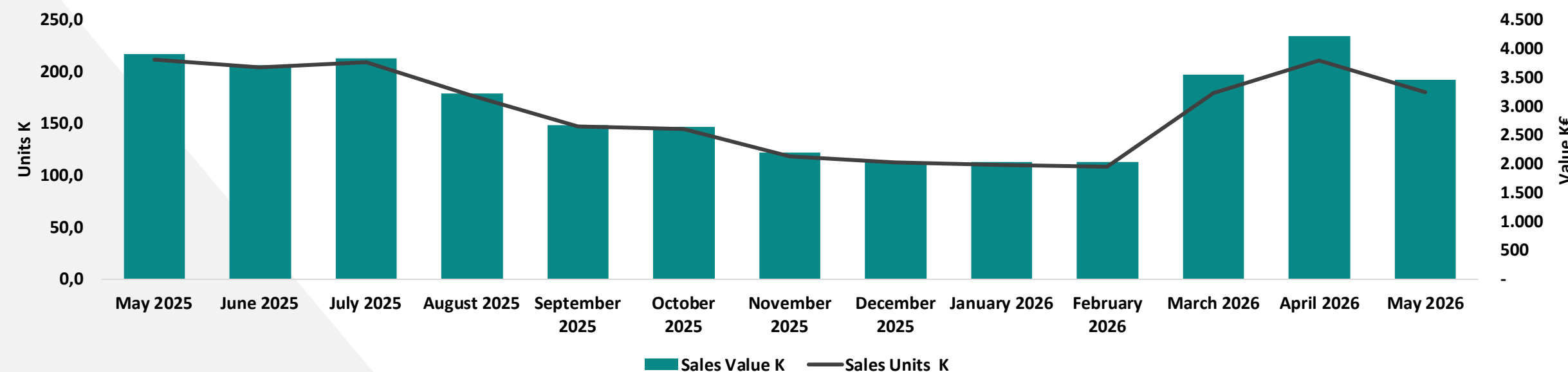
Top 5 HMR 3 with the most competitive dynamics

Rank Var. Abs.	HMR3	Var. Abs. Value	Var. PYG%
1	H21.13.1. - Antineoplásicos	15.594 €	293,1%
2	H21.7.3. - Preparações urológicas	4.185 €	28,3%
3	H21.21.4. - Champôs	3.804 €	31,3%
4	H21.6.9. - Fármacos usados na diabetes	3.413 €	14,8%
5	H21.6.3. - Antieméticos	2.682 €	34,4%

Top 5 products with higher performance

Rank Var. Abs.	PRODUCT	Var. Abs. Value	Var. PYG%
1	AdTab	29.421 €	13,8%
2	Palladia	17.453 €	617,7%
3	Dehispot	5.246 €	-
4	Drontal Puppy	4.962 €	64,5%
5	Zenrelia	3.818 €	-

Veterinary Market - Sell Out - Value (K) and Units (K)



May 2026

Sales Units PYG% -15,1%

Sales Value PYG% -11,4%

Sell Out Values and Units- Thousands Euros and thousands Units
 PYG% - Previous Year Growth of the most recent month.

DATA SPECIFICATION

PHARMACY MARKET WATCH

HMR Pharmacy Universe

Pharmacies in Portugal (Mainland and Islands) with sales to the public – 2910.

HMR Pharmacy Panel

This report is based on a panel of 2,620 pharmacies out of a total of 2,910 belonging to the Universe considered in the HMR study. All pharmacies in mainland Portugal and the islands with sales to the public were considered. Numerical coverage = 90% for the current month.

Scope

Monthly evolution of the Pharmacy Market in Portugal.

Periodicity

Monthly

Periods of time in the report

Monthly data with 25 months historical data.

Measures included in the report:

Sell Out (SO) – Sales from the pharmacy to final consumer. Sales in value are assessed at Street Price (the actual retail price to the consumer).

Average Price – Average Price of all pharmacies regarding products sold.

Segments

- **Pharma Market** – Includes all RX and Non-RX products with AIM* in Portugal that can be dispensed in community pharmacies.
- **Prescription Medicines** – Covers all RX Prescription Medicines for human use with AIM that can be sold in community pharmacies:
 - **Prescription Branded Medicines** – Includes RX Prescription Medicines Non-Generics with AIM in Portugal, sold in community pharmacies.
 - **Prescription Generic Medicines** – Includes RX Generics and Non-RX Generics with AIM in Portugal, sold in community pharmacies.

- **Consumer Health** – Covers all Non-RX Prescription Medicines, OTC, Supplements, Personal Care, Patient Care, Nutrition, Homeopathic, for human use that can be sold in community pharmacies.
 - **OTC** – Over The Counter (Non-RX Medicines).
 - **Non-Prescription branded OTC** – Includes OTC medicines Non-Generics with AIM in Portugal, sold in community pharmacies.
 - **Non-Prescription generic OTC** – Includes Generics-OTC medicines with AIM in Portugal, sold in community pharmacies.
 - **Nutrition** – Composed of nutrition products, including food for special medical purposes, special diets, and weight-loss diets. It also includes infant formulas.
 - **Patient Care** – Composed of products for patient care. Includes medical devices for multiple indications and various accessories.
 - **Personal Care** – Includes all products intended for personal care, encompassing health and well-being products (dermo cosmetics and personal hygiene).
 - **Supplements** – Includes food supplements used to complement a normal diet.
 - **Homeopathic** – Includes homeopathic products with simplified registration. Excludes homeopathic medicines with AIM in Portugal.
- **Veterinary** – Includes veterinary medicines and health products.
- **Others** – Includes products with low market relevance, such as raw materials and compounded preparations.

*AIM - Autorização de Introdução no Mercado



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