Self-care Medical Devices Market Insights - Europe

Prepared for AESGP

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Project background, objectives and scope

AESGP wish to understand the market size and trends for the self-care medical devices market across Europe

Project background

- AESGP, the Association of the European Self-Care Industry, is the voice of the manufacturers of OTC products, food supplements, and self-care medical devices in Europe
- AESGP approached IQVIA to help them understand the self-care medical devices market trends and size considering the immediate need for self-care medical devices market data

Project Objectives

- Conduct a **data-driven analysis** of self-care medical devices category in Europe covering key elements, including
  - **Market overview**, providing a view of the latest market trends
  - **Market size and evolution** by country and category* (OTC/PEC/PAC/Nutrition)

Note : The market analysis will include high level category analysis at top level only in each country depending on the scope of the agreement.

− The analysis could further extend to sub-segment (CHC2) level considering the significant variability in medical device share specially across OTC categories

We will focus on the European countries with IQVIA OTC / PEC /PAC / Nutrition coverage for unregistered data attribute

International Data Coverage

EUROPE

Country	Channel	CH Segment			
		OTC	PEC	PAC	NTR
Austria	Pharmacy	•	•	•	•
Belgium	All Outlets (incl. pharmacy, parapharmcy, e-Pharmacy	•	•	•	•
Bulgaria	Pharmacy	•			
Croatia	Pharmacy	•	•	•	•
Czech Republic	Pharmacy	•	•	•	•
Czech Republic	e-Pharmacy	•	•	•	•
Finland	Pharmacy	•			
France	Pharmacy	•	•	•	•
France	Parapharmacy	•	•	•	•
Germany	Pharmacy	•	•	•	•
Germany	Pharmacy Mail Order	•	•	•	•
Germany	Drugstores	•			
Germany	Supermarkets	•			
Germany	Small Supermarkets	•			
Germany	Discounters	•			
Greece	Pharmacy	•	•	•	•
Hungary	Pharmacy (incl. e-Pharmacy	•	•	•	•
Italy	Pharmacy	•	•	•	•
Italy	Parapharmacy	•	•	•	•
Italy	Mass Market corners	•	•	•	•
Italy	Mass Market no-corners	•	•	•	•
Italy	e-Pharmacy	•	•	•	•

Country	Channel	CH Segment			
		OTC	PEC	PAC	NTR
Netherlands	Pharmacy	•			
Netherlands	Drugstores	•			
Netherlands	Supermarkets	•			
Poland	E-Pharmacy	•	•	•	•
Poland	Pharmacy	•	•	•	•
Portugal	Pharmacy	•	•	•	•
Portugal	Mass Market	•	•	•	•
Romania	Pharmacy	•			
Slovakia	E-Pharmacy	•	•	•	•
Slovakia	Pharmacy	•	•	•	•
Slovenia	Pharmacy	•			
Spain	Pharmacy	•	•	•	•
Spain	Parapharmacy	•	•	•	•
Switzerland	Pharmacy	•	•	•	•
Switzerland	Drugstores	•	•	•	•

Sell out data available in all markets except Slovenia

Note: ***Medical device data attribute is available in local data from Italy, Germany, Belgium, Switzerland, France and Poland****. For rest of the countries, there is no specific data attribute within CH Global Database to identify "medical devices" at present. However, the available "REGISTRATION" data attribute can indicate of Total OTC* product sale of Registered OTCs vs Unregistered products.*

Country Scope

1. Austria
2. Belgium
3. Bulgaria
4. Croatia
5. Czech Republic
6. Finland
7. France
8. Germany
9. Greece
10. Hungary
11. Ireland (OTC)
12. Italy
13. Latvia (OTC)
14. Netherlands
15. Poland
16. Portugal
17. Romania
18. Slovakia
19. Slovenia
20. Spain
21. Sweden
22. Switzerland
23. Norway
24. Lithuania (OTC)
25. Estonia (OTC)
26. UK (OTC)
27. **Europe Medical Device Market Trends**

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Approach & Methodology

IQVIA proposed a structured approach to address the key objectives of this engagement

Phase 1
Kick Off/Category Alignment

Key Activities

- Kick off Meeting with AESGP team to discuss the definition of “self-care medical devices category definition/ scope based on the shared IQVIA CH Classification classes at CHC2 level.
- AESGP team to confirm the CHC2 classes to be included in scope of this project.

Key Deliverables:

- AESGP alignment on category scope with list of categories for analysis in next phases

Phase 2
Analysis of Medical device Market value

Key Activities

- Extrapolate the market value of in scope countries for channel coverage
- Leverage existing benchmarks on medical device share from local data and apply the ballpark estimate (in consultation with AEGSP team) to rest of the countries

Key Deliverables:

- Initial estimates to medical device market value to be leveraged in the next phase

Phase 3
Medical Device Market Landscape

Key Activities

- Conduct quantitative analysis of self care medical device market including details at category level to analyse key elements by total market and country
  - **Market size and evolution** from past 3 years (value and volume)
  - **Pack counts**
  - **Market growth** – annual and 3-year CAGR

Key Deliverables:

- Excel report and PowerPoint presentation with summarizing the project findings

We focused on the European countries having IQVIA data coverage for unregistered and medical device data attribute

International Data Coverage

	Country	Channel	CH Segment			
			OTC	PEC	PAC	NTR
EUROPE	Austria	Pharmacy	•	•	•	•
	Belgium	All Outlets (incl. pharmacy, parapharmcy, e-Pharmacy	•	•	•	•
	Bulgaria	Pharmacy	•			
	Croatia	Pharmacy	•	•	•	•
	Czech Republic	Pharmacy	•	•	•	•
	Czech Republic	e-Pharmacy	•	•	•	•
	Finland	Pharmacy	•			
	France	Pharmacy	•	•	•	•
	France	Parapharmacy	•	•	•	•
	Germany	Pharmacy	•	•	•	•
	Germany	Pharmacy Mail Order	•	•	•	•
	Germany	Drugstores	•			
	Germany	Supermarkets	•			
	Germany	Small Supermarkets	•			
	Germany	Discounters	•			
	Greece	Pharmacy	•	•	•	•
	Hungary	Pharmacy (incl. e-Pharmacy	•	•	•	•
	Italy	Pharmacy	•	•	•	•
	Italy	Parapharmacy	•	•	•	•
	Italy	Mass Market corners	•	•	•	•
	Italy	Mass Market no-corners	•	•	•	•
	Italy	e-Pharmacy	•	•	•	•

Country	Channel	CH Segment			
		OTC	PEC	PAC	NTR
Netherlands	Pharmacy	•			
Netherlands	Drugstores	•			
Netherlands	Supermarkets	•			
Poland	E-Pharmacy	•	•	•	•
Poland	Pharmacy	•	•	•	•
Portugal	Pharmacy	•	•	•	•
Portugal	Mass Market	•	•	•	•
Romania	Pharmacy	•			
Slovakia	E-Pharmacy	•	•	•	•
Slovakia	Pharmacy	•	•	•	•
Slovenia	Pharmacy	•			
Spain	Pharmacy	•	•	•	•
Spain	Parapharmacy	•	•	•	•
Switzerland	Pharmacy	•	•	•	•
Switzerland	Drugstores	•	•	•	•

Sell out data available in all markets except Slovenia

*Note: Medical devices data attribute is available in **local data from Italy, Germany, Belgium and Poland**. For rest of the countries, there is no specific data attribute within CH Global Database to identify "medical devices" at present. However, the available "REGISTRATION" data attribute can indicate of Total OTC* product sale of Registered OTCs vs Unregistered products.*

We covered following categories under the scope of self-care medical devices in agreement with AESGP team (1/3)

	CHC category	CHC 2 segments
OTC	01 COUGH COLD & OTH RESP PROD	01A COUGH PRODUCTS
		01B COLD REMEDIES
		01C SORE THROAT REMS.
		01D ASTHMA REMEDIES
		01E RESPIR & GENER ANTIALLERG
		01F NASAL SALINE SOLUTIONS
		01V PRD FOR OTHER RESP.CONDIT
	02 PAIN RELIEF	02B DYSMENORRHEA REL.
		02D MOUTH PAIN RELIEF
		02E MUSCULAR PAIN REL.
		02G JOINT CARE PRODUCTS
		02H NON-SPECIFIC ANTISPASMOD
		02V OTH SPECIFIC PAIN RELIEF
	03 DIGEST & OTH INTEST PROD	03A DIGEST TRACT&STOMACH PROD
		03C LAXATIVES
		03D ANTIDIARRHOEALS
		03G ACID CONT & HEARTBURN PRD
	06 SKIN TREATMENT	06A ACNE TREATMENT
		06B HAND SKIN WOUND DISINFECT
		06C SKIN IRRITATION
		06D ANTI-PSORIASIS
		06F WOUND HEALING PRODUCTS
		06G ANTIFUNGALS
		06H SCAR AND KELOID PRODUCTS
		06K COLD SORE TREATMENTS
		06L WART/CORN REMOV EXC PLAST
		06P SKIN PROTECTOR+EMOLLIENTS
		06V OTHER SKIN PRODUCTS

	CHC category	CHC 2 segments
OTC	07 EYE CARE	07A EYE CARE
	08 EAR CARE	08A EAR CARE
	09 MOUTH TREATMENT PRODUCTS	09A FLUOR PRO X T/PAST+M/WASH
		09C MOUTH INFECTION TREATMENT
		09V ALL OTH MOUTH TREAT PROD
	10 CIRCULATORY PRODS.	10A ANTIHAEMORRHOIDS
		10F CHOLESTEROL REGULATING PR
		10V ALL OTH CIRCULATORY PRDS
	12 URINARY AND REPRODUCT CAR	12C PRODUCTS FOR URINARY COND
		12D GYNAECOLOGICAL PREPS
		12F PROD FOR UROLOG MALE COND
	14 WEIGHT LOSS PRODUCTS	14A WEIGHT LOSS PRODUCTS
	17 HABIT TREATMENT	17A NAIL BITING
		17B SMOKING CONTROL PRODUCTS
		17C ANTI ALCOHOL
		17D OTHER HABIT TREATMENTS
	18 MISCELLANEOUS	18A MISCELLANEOUS
	97 ALL OTH MISC PRODS	97A ALL OTH MISC PRODS

	CHC category	CHC 2 segments
PEC	85 PERSONAL HYGIENE	85D INTIMATE HYGIENE
		85E FOOT HYGIENE
		85F HAND HYGIENE(EXCL SOAPS)
	87 ORAL HYGIENE	87A TOOTHPASTES
		87B MOUTHWASHES
		87Z OTH ORAL HYGIENE PRODUCTS
	93 ORAL HYGIENE & CARE ACCE	93A TOOTHBRUSHES
		93B DENTAL FLOSS
		93C INTERDENTAL BRUSHES+ACCES
		93D DENTAL STICKS
		93E DENTURE PRODUCTS
		93Z OT ORAL HYGIE & CARE ACCE
	94 ACCESSORIES FOR BABIES	94B FEEDING BOTTLES+ACCESSOR
		94C DUMMIES / PACIFIERS&TEETH R

We will cover following categories under the scope of self-care medical devices in agreement with AESGP team (2/3)

	CHC category	CHC 2 segments
PAC	40 TRADITIONAL DRESSINGS	40B TRADITIONAL DRESSINGS
	41 SURGICAL ABSORBENTS	41A COTTON WOOL PRODUCTS
		41B SWABS AND PADS
		41C PACKS AND PATCHES
	42 FIXATIVE + SPECIAL TAPES	42C FIXATIVE ADHESIVE TAPES
		42D SPECIAL TAPES
	43 BANDAGES	43A RETENTION/FIXATIV BANDAG
		43B SUPPORT+COMPRESSION BAND
		43C MEDICATED BANDAGES
		43D ORTHOPAEDIC CASTING MATRL
		43Z OTHER BANDAGES
	44 PRESSURE SORE PREVENTION	44A CUSHIONS
		44B PRESSURE SORE FLEECES
		44C RINGS
		44D BED SHEETS
	45 FIRST AID KITS	45A FIRST AID KITS
	46 WOUND CARE	46A WOUND CARE
	47 ADVANCED DRESSINGS	47A BASE TECH ADVAN DRESSINGS
		47B ANTI-INFEC ADVANCED DRESS
		47C ADVANC DRESS+HYALURON AC
		47D ADVANC DRESS+COLLAGEN
		47V OTHER ADVANCED DRESSINGS
	49 PLASTERS	49A TRADIT PLAS STRIP GEN USE
		49B TRAD PLASTER SPECIAL USES
		49C SPECIAL PLASTER+PROTECTOR
		49D LIQUID PLASTERS

	CHC category	CHC 2 segments
PAC	50 STOMACARE PRODUCTS	50A ILEO-COLO+UROSTOMY PRDS
		50B STOMACARE PROTECTIVES
		50C STOMACARE ACCESSORIES
	52 INCONTINENCE CARE PRDS	52A LIGHT INCONTINENCE PRDS
		52B MOD HEAV SEV INCONT PRDS
		52C BED SHEETS/PADS
		52D CARE PRDS FOR INCONTINENC
		52E OTHER PRDS FOR INCONTINEN
	53 PRDS FOR BLADDER PROBLEMS	53A URETHRAL CATHETERS
		53B DRAINAGE BAGS & BAG COVER
		53C URINARY SHEATHS & ACCESSO
		53D OTH PRDS FOR BLADDER PROB
	54 BABY DISPOSABLES & CH ENU	54A BABY DISPOSABLES & CH ENU
	55 INJECTION DEVICES	55A DISPOS INJECTION DEVICES
		55B REUSABLE DEVICES
		55C INJECTION ACCESSORIES
	56 TESTS+MEASURING INSTRUMNT	56A BLOOD PRESS M APPAR & ACC
		56B STETHO PHONENDO+ACCESSOR
		56C WEIGHT MEASURING EQUIP
		56D THERMOMETERS
		56E GLUC TEST+MEASUR INSTRUMT
		56F CHOL TEST+MEASUR INSTRUMT
		56H KETONE BODY TESTS
		56J PROTEIN TESTS
		56K MULTIPURPOSE TESTS
		56L OCCULT BLOOD TESTS
		56M ALCOHOL TEST+MEASUR INSTR
		56N PREGNANCY TEST KITS
		56P OVULAT TESTS&MEASUR INSTR
		56R VAGINAL INFECTION TESTS
		56S LANCETS+SAMPLING DEVICES
		56T CORONAVIRUS TESTS
		56V OTH DIAG TEST+MEASR INSTR

We covered following categories under the scope of self-care medical devices in agreement with AESGP team (3/3)

	CHC category	CHC 2 segments
PAC	57 MEDICAL/SURGICAL AIDS	57A ENEMAS/DOUCHES+CANNULAS
		57B RUBBER BULBS & SPLASHERS
		57C GLOVES
		57D URINE/FAECAL TEST BOTTLE
		57E SURGICAL DEVICES
		57F HOT WATER BOTTLES
		57G HOT AND COLD PACKS
		57H INHALATION & AEROSOL PROD
		57J ELECTRIC INSTRUMENTS
		57K MISCELLANOUS
		57M MASKS
	58 ORTHOPAED/ANTIRHEUM AID	58A SLIMMING CLOTHING
		58B CORSETS
		58C BELTS+ATHLETIC+OTHER SUPP
		58D CURATIV/ELASTIC STOCKING
		58E CLOGS+ORTHOPAED FOOTWEAR
		58F ANTIRHEUMATIC AIDS
		58G GYMNASTIC EQUIPMENT
		58H EQUIPMENT FOR DISABLED

	CHC category	CHC 2 segments
PAC	63 CONTACT LENS/GLASSES/ACCE 64 CONTACT LENS CARE	63A CONTACT LENSES/ACCESSOR
		63B GLASSES AND ACCESSORIES
		64A HARD CONTACT LENS CARE
		64B SOFT CONTACT LENS CARE
		64C ALL CONTACT LENS CARE
	65 BABY+NURSING ACCESSORIES	65A MILK EXTRACTORS
		65B LAYETTES
		65D BABY CARE ACCESSORIES
		65E BABY EQUIPMENT
	66 CONTRACEPTION	66A CONDOMS
		66B INTRA-UTERINE DEVICES
		66C DIAPHRAGMS
		66D SPERMICIDES
		66Z OTH TOPICAL CONTRACEPTIVE
	79 OTHER PATIENT CARE PRODS	79A OTHER PATIENT CARE PRODS

We followed a structured approach to determine the medical devices value and volume sales in Europe for landscape analysis

Methodology

1. **Extrapolate** the IQVIA historical CH sales **for missing channels** (refer to the next slide) by factoring in available internal benchmarks

2. Leveraged local data to **estimate medical device share** (value & volume) of *Germany, Belgium, Poland and Italy* at selected CHC 1 & 2 category level

3. **Mapped the remaining countries** in-scope with *Germany, Belgium, Poland and Italy* based on similar regulatory framework in agreement with AESGP team

4. **Applied estimated ballpark** for medical devices share **to remaining countries** as per their mapping to derive medical device sales

Note: The proposed extrapolation methodology and identification of medical devices share benchmarks have been aligned with AESGP core team

Missing channels from IQVIA Audit

Account for 4 -20% in countries in-scope

Countries	Missing Channels	Share*
Austria	Drug store, Supermarket	10%
Belgium	Para-pharmacy, Drug store, Supermarket	7%
Bulgaria	Drug store, Supermarket	
Croatia	Drug store, Supermarket, Hospital Pharmacy, Specialist stores, Clinics	5%
Czech Rep	Drug store, Supermarket	6%
Finland	Drug store, Supermarket aisle, Online	7%
France	Online/ Mail order	9%
Germany	Online/Mail order	9%
Greece	Drug store, Supermarket	6%
Hungary	Drug store, Supermarket, Online, Gas station	12%

Countries	Missing Channels	Share*
Italy	Para-pharmacy, Supermarket	6%
Netherlands	Online/ Mail Order	10%
	Drug store, Supermarket	4%
Portugal	Para-pharmacy, Supermarket, Online	10%
Romania	Drug store, Supermarket, Online	7%
Slovakia	Drug store, Supermarket	10%
Slovenia	Drug store, Supermarket, Hospital Pharmacy, Specialist stores, Clinics	5%
Spain	Supermarket, Hospital, Clinics	20%
Switzerland	Drug store, Online	11%

ILLUSTRATIVE

*Note: *IQVIA estimates of share of missing channels*

Countries Mapping - 1

Estimated medical devices value/volume for in-scope counties based on existing benchmarks

Countries in Scope*	Countries Map			
	Germany	Belgium	Italy	Poland
Austria	Yes			
Bulgaria				Yes
Croatia	Yes			
Czech Rep				Yes
Finland	Yes			
France		Yes		
Greece		Yes		
Hungary	Yes			
Netherlands	Yes			
Portugal	Yes			
Romania				Yes
Slovakia				Yes
Slovenia	Yes			
Spain		Yes		

Note: Reference countries mapped on a best efforts basis, considering the regulatory similarities and aligning with AESGP core team; There may be few deviations arising due to a different regulatory scenarios in the countries and might potentially impact the overall analysis

Countries Mapping - 2

Estimated medical devices value/volume for in-scope counties based on existing benchmarks

Countries in Scope*	Countries Map			
	Germany	Belgium	Italy	Poland
Estonia				Yes
Ireland	Yes			
Latvia				Yes
Lithuania				Yes
Norway	Yes			
Sweden	Yes			
UK			Yes	

Note: Reference countries mapped on a best efforts basis, considering the regulatory similarities and aligning with AESGP core team; There may be few deviations arising due to a different regulatory scenarios in the countries and might potentially impact the overall analysis

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Glossary of terms

Glossary of terms used

Key Terms	Definitions
CHC (1 and 2)	Consumer Health Classification (Level 1 and Level 2)
OTC	Over-the-Counter products
PEC	Personal care products
PAC	Patient care products
MAT Q2/MAT June	Moving Annual Total refers o data from 09/2022 to 06/2025
MAT Q2 Historical Time Frame	Refers to Data period used 09/2022 to 06/2025
Category Share (%)	Category sales (value or volume) contribution to total sales of medical device and non-medical device products for market element
Medical devices Share (%)	Medical devices sales (value or volume) contribution to total sales of medical device and non-medical device products for market element
CAGR	Compound annual growth rate (average annual growth rate over a specified period of time)
PY	Previous year
Short term (S-T) growth (%)	Latest Year annual growth rate (2024-25)
Long term (L-T) growth (%)	Last 3 years historic CAGR (2022-25)

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Europe Medical Devices – Market Dynamics

Europe Medical Devices Performance Overview

Medical devices witnesses a decline in long term; witnesses a bounce back in the recent year

35%

Medical device share of total CH value in 2025

Long –term Growth

-2.2% by value

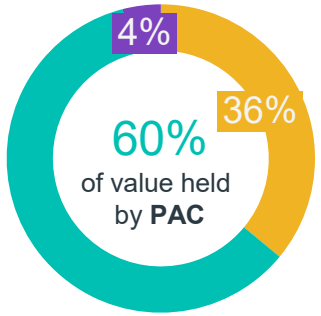
-6.7% by volume

Short –term Growth

3.0% by value

-1.3% by value

Medical Devices – €20.6 Bn (2025)



Long-term Growth (Value)

-6.8% PAC

6.8% OTC

5.1% PEC

Medical Devices Categories

43%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **86%** of new pack launches

Medical Devices Innovation

Test Instruments

28% Share of total PAC values in 2025; Dominated by **Gluc Measuring**

Long-term Growth

-20.3% by value

PAC (Patient care)

Eye Care

31% Share for total OTC value in 2022

Long-term Growth

7.3% by value

OTC (Over-the-Counter)

Oral Care Accessories

52% Share of total PEC value share in 2025; Dominated by **Denture products**

Long term Growth

4.5% by value

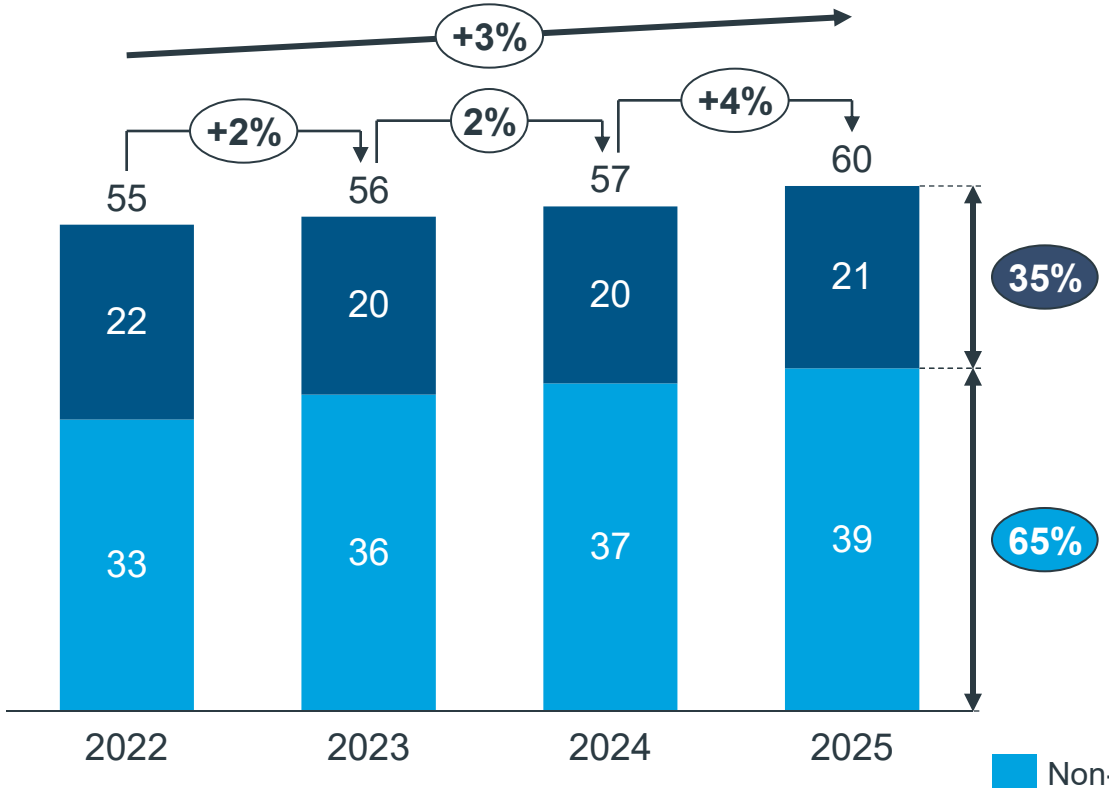
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

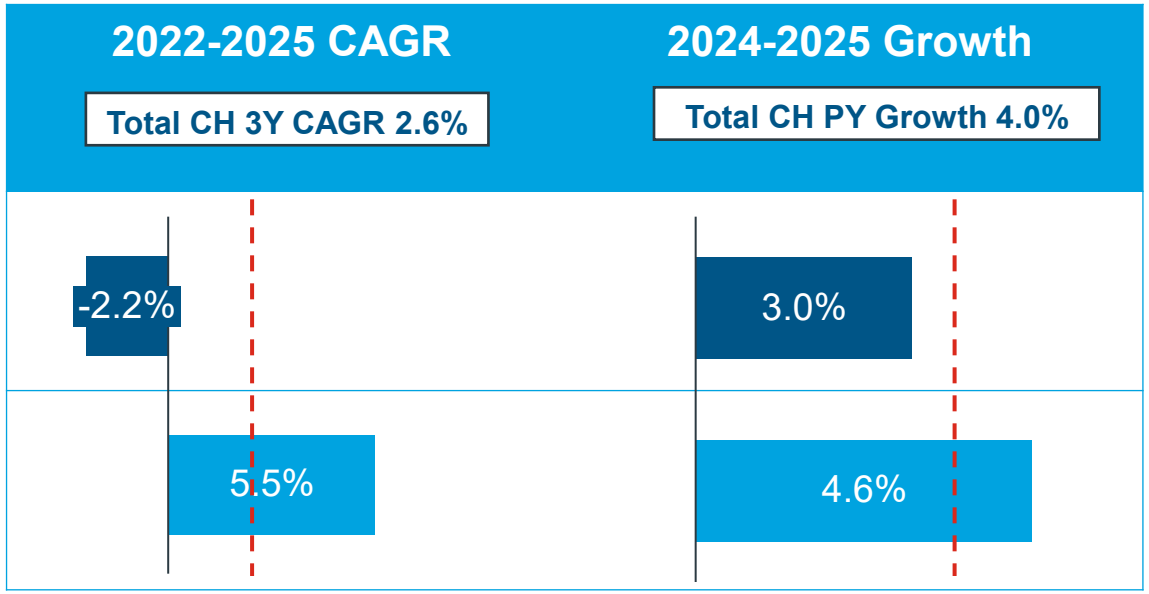
Europe CH Market Size & Growth

Medical devices represent 35% of the value, positive short-term growth

Market Value (LC€ Bn), and Latest Value Share (%)



Value Growth

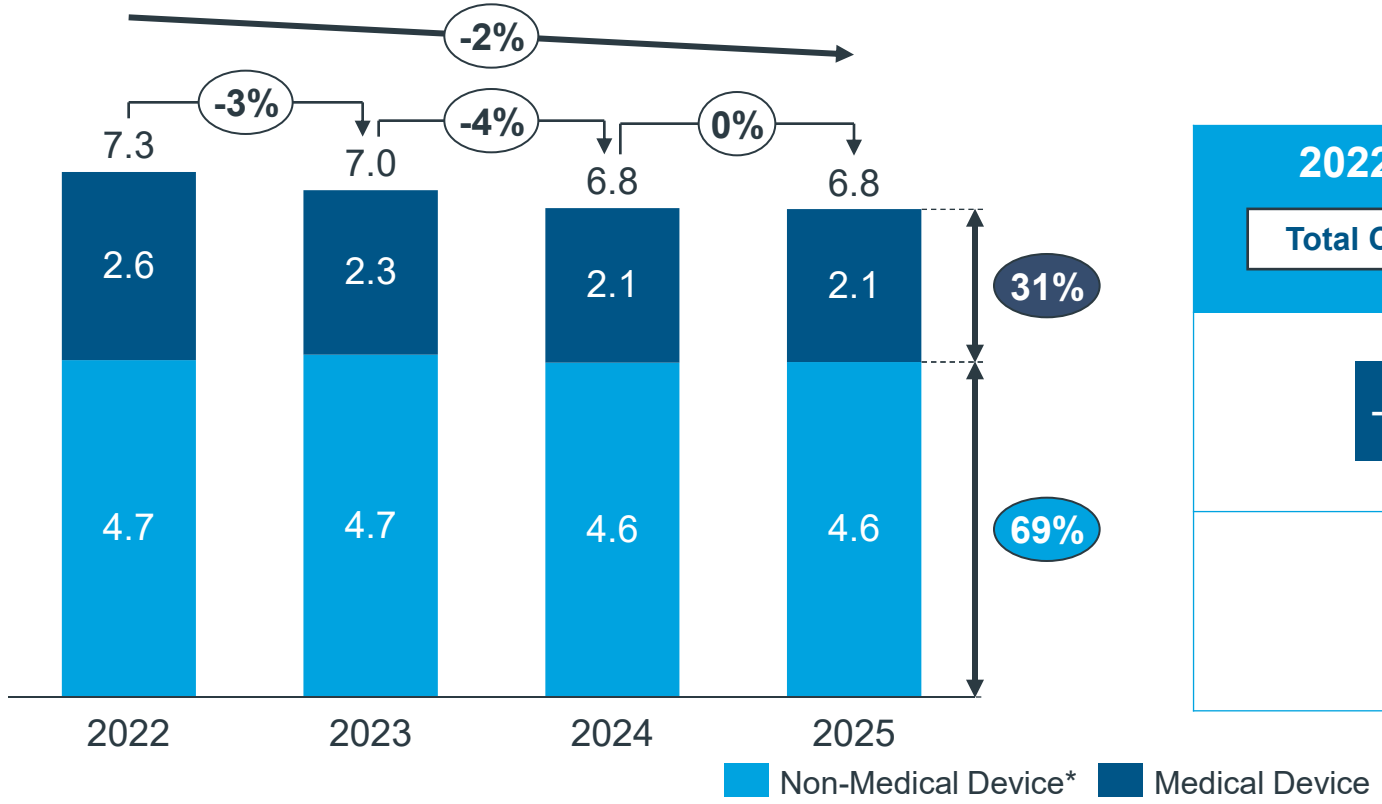


Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

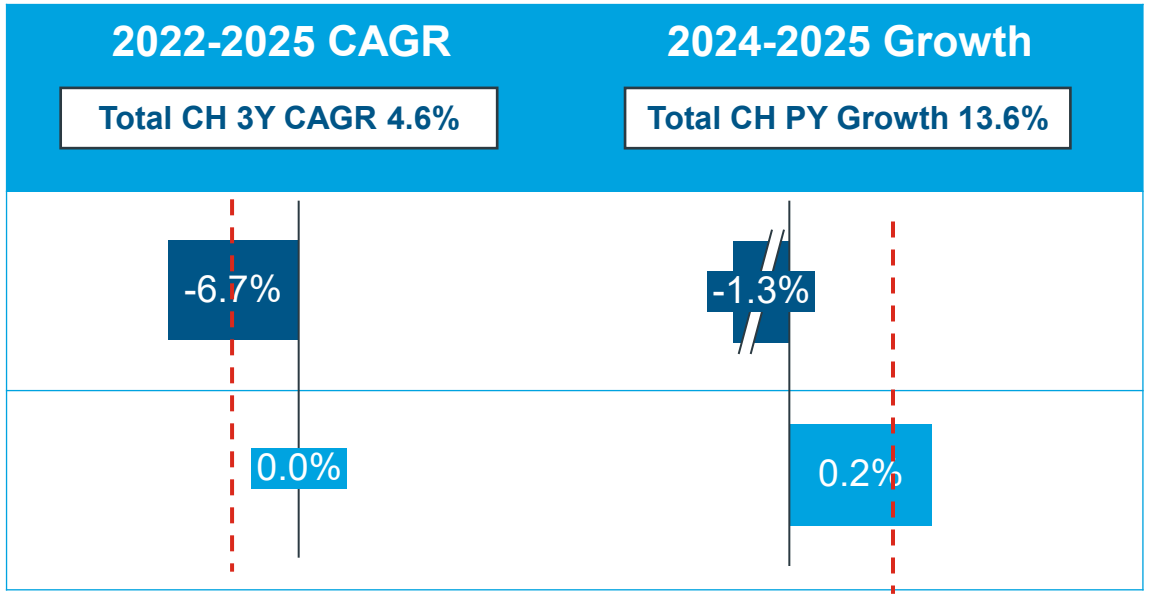
Europe CH Market Volume & Growth

Medical devices account for 31% of volumes; volume growth higher than value growth

Market Volume (Mn Units), and Latest Volume Share (%)



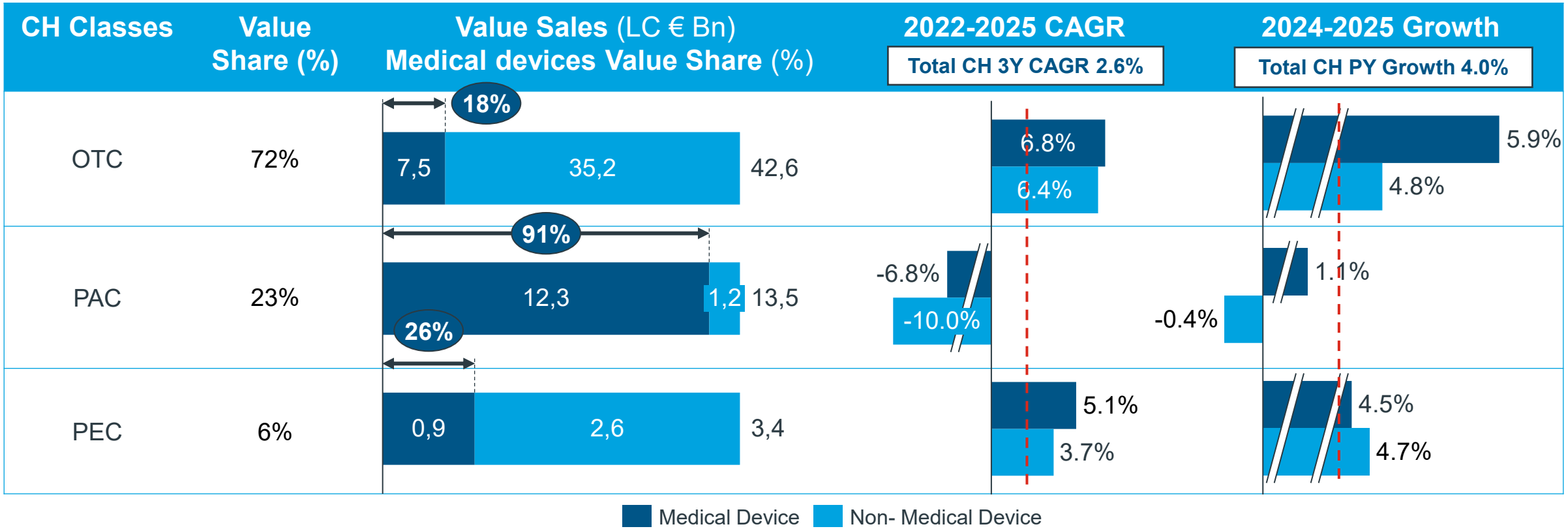
Volume Growth



Source: IQVIA Global CH Insights – Sales in Units based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Europe CH Performance by Classes

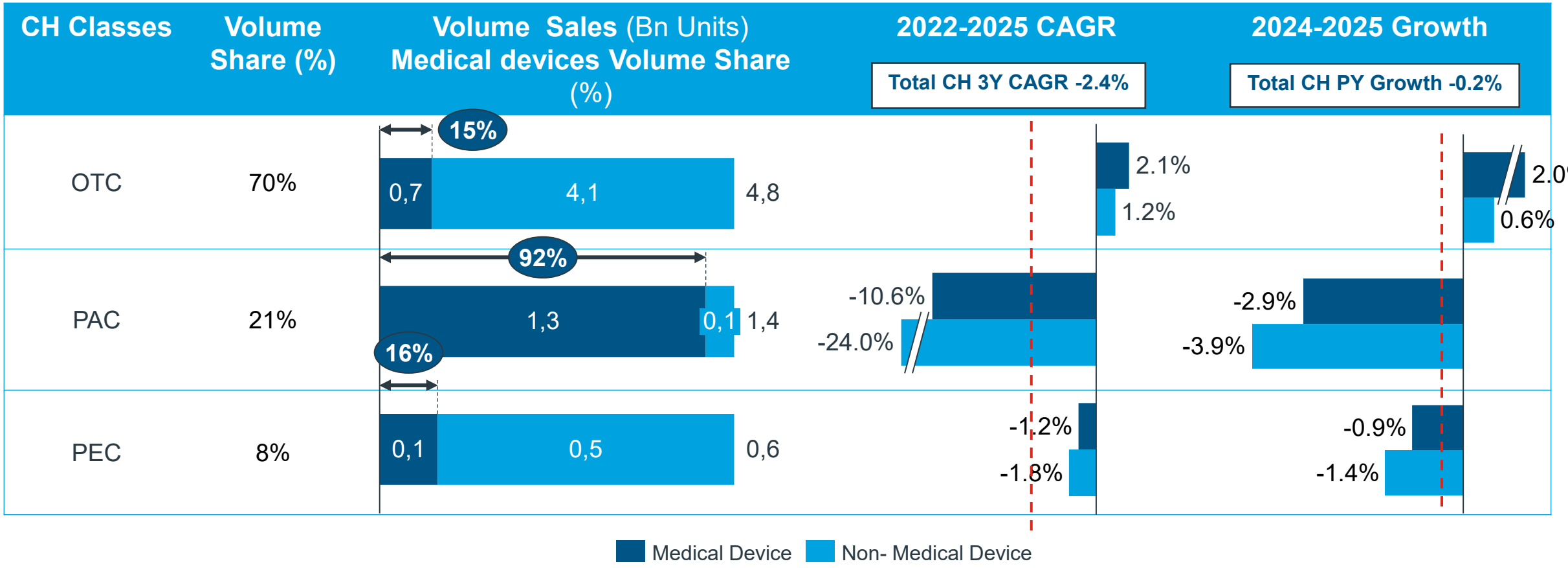
*Patient care is the largest contributor of medical devices value sales with **€12 Bn** sales in 2025*



Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Europe CH Performance by Classes

Patient care continues to lead in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Europe Medical Devices Packs & New Launches

Most of the new medical device launches come from Patient care segment

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device	Total	Medical Device	Non Medical Device	Total
CH Total	176,489	213,878	**390,367**	38,353	160,854	**199,207**
OTC	16,160	107,806	**123,966**	3,599	81,724	**85,323**
Patient care	156,561	53,391	**209,952**	33,670	39,915	**73,585**
Personal care	3,768	52,681	**56,449**	1,084	39,215	**40,299**

Medical Device Non Medical Device Medical Device Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
**New Launch products represent the unique packs had been launched in last 3 year

Europe CH Market by Country – Size & Growth

Medical devices account for more than 30% in both value and volume share; UK, Portugal and Poland record strong growth in the recent year

	Medical Devices Sales in 2025		Medical Devices Shares of total CH (%) in 2025		Medical Devices Value Trends		Medical Devices Volume Trends	
	Value (€ Mn)	Volume (Mn Units)	Value	Volume	2022-2025 CAGR	2024-2025 Growth	2022-2025 CAGR	2024-2025 Growth
EUROPE	20,668	2,115	35% / 65%	31% / 69%	-2.2%	3.0%	-6.7%	-1.3%
Germany	4,833	308	36% / 64%	21% / 79%	-0.4%	3.7%	-2.4%	0.8%
France	3,578	308	44% / 56%	32% / 68%	0.1%	3.1%	-2.8%	-1.2%
Italy	3,309	334	37% / 63%	37% / 63%	-6.1%	-0.6%	-8.0%	-4.6%
Spain	2,128	186	39% / 61%	36% / 64%	-10.7%	0.0%	-25.2%	-10.4%
Poland	1,210	248	32% / 68%	34% / 66%	5.7%	5.9%	-2.0%	-0.8%
Belgium	867	68	30% / 70%	31% / 69%	-7.2%	1.7%	-12.7%	-2.3%
UK	651	58	25% / 75%	22% / 78%	4.4%	6.2%	0.4%	1.6%
Portugal	529	43	37% / 63%	34% / 66%	-1.4%	6.5%	-18.1%	-2.6%
Switzerland	514	21	29% / 71%	23% / 77%	-8.1%	2.0%	-15.5%	-0.5%

Western Europe Countries

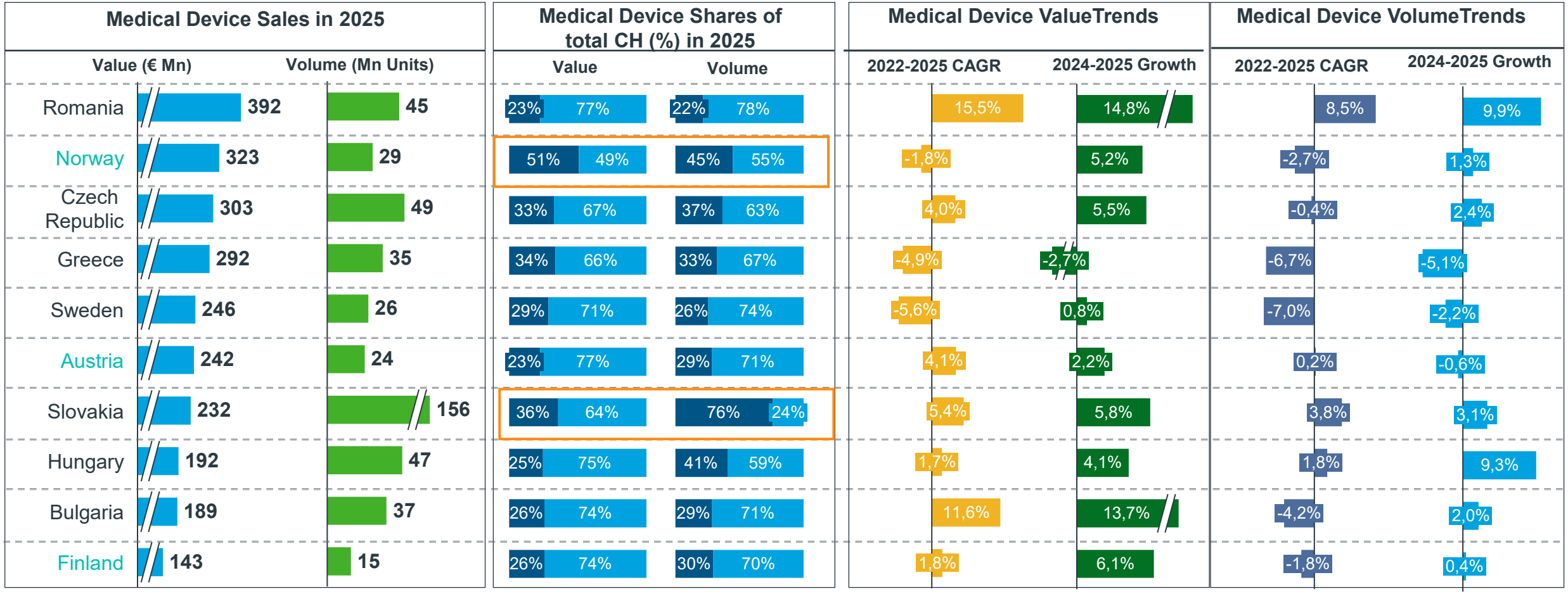
Medical Device | Non Medical Device

Source: IQVIA Global CH Insights based on MAT Q2 2025
* Include selected European countries & categories based on project scope

done

Europe* CH Market by Country – Size & Growth

Norway witnesses a higher penetration of MD in value; while Slovakia has penetration of 76% in volume share

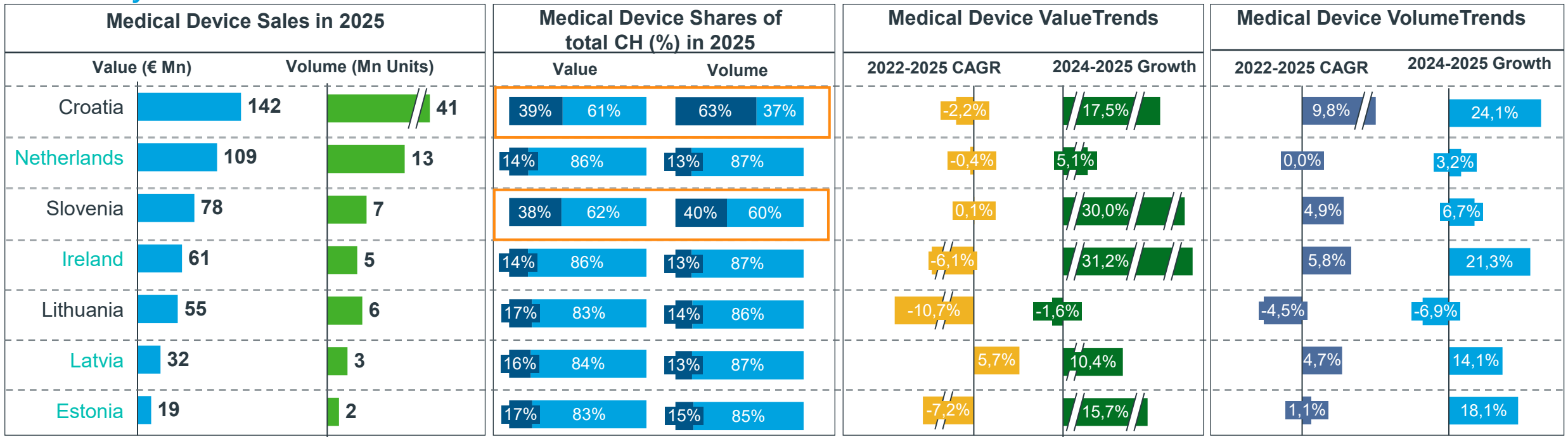


Source: IQVIA Global CH Insights based on MAT Q2 2025

*include selected European countries & categories based on project scope; only OTC sales in Bulgaria, Finland, Slovenia, Netherlands, Romania

Europe* CH Market by Country – Size & Growth

Smaller markets like Croatia, Slovenia, Ireland and Estonia record phenomenal growth in the recent year



Western Europe Countries

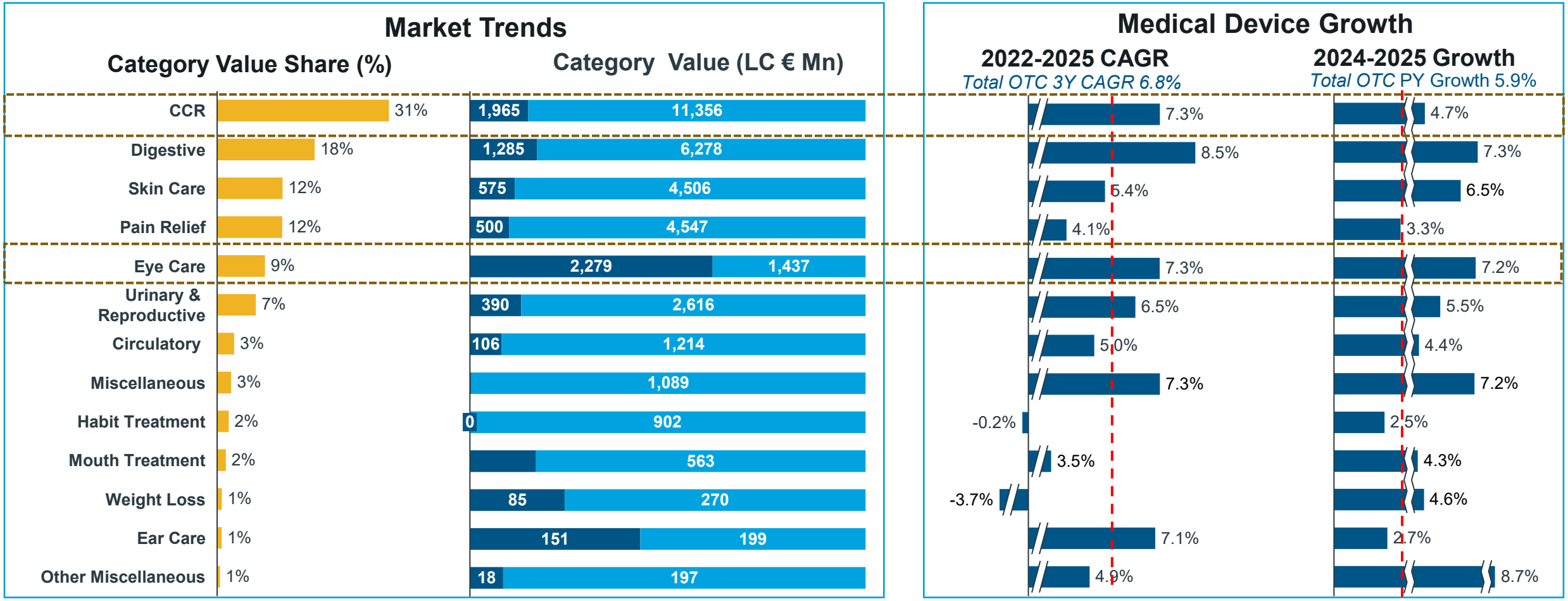
Medical Device | Non Medical Device

Source: IQVIA Global CH Insights based on MAT Q2 2025

*include selected European countries & categories based on project scope; only OTC sales in Bulgaria, Finland, Slovenia, Netherlands, Romania

Europe OTC Performance by CHC 1 Category in 2025

Eye care leads medical device sales with over €2 Bn, Digestive growing rapidly

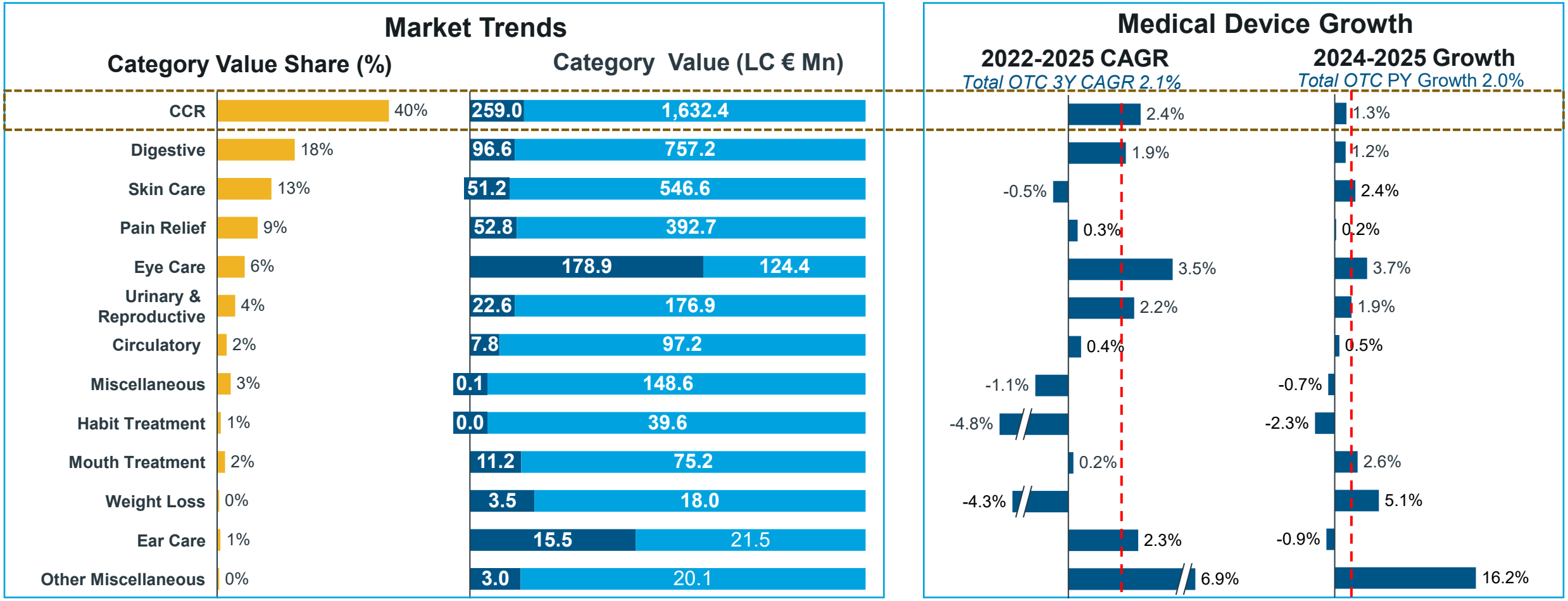


Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

S-T – short term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Europe OTC Performance by CHC 1 Category in 2025

Eye care continues to lead with highest penetration of medical devices in volumes



Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

L-T – Long term, S-T – short term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Europe Medical Devices Performance by top CHC 2 Segments (1/2)

Eye care, CCR, and Digestive categories represent over 60% of the value, led by Nasal saline

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments – Medical Device Value (LC € Mn)
OTC- Medical Device		**7470.5**	
Eye Care	31%	2278.7	Not Available
CCR	26%	1965.2	Nasal Saline 972.6; Sore Throat 396.9; Cough 341.0; Other Respiratory 128.5
Digestive	17%	1284.8	Laxatives 552.7; Acid & Heartburn 382.9; Digestive 244.2; Antidiarrhoeals 105.0
Skin Care	8%	575.3	Wound Healing 162.3; Wart/Corn Removal 109.3; Skin Protector/Emollients 100.8; Hand Skin Wound Disinfect 60.4
Pain Relief	7%	500.3	Muscular Pain 335.4; Mouth Pain 160.3; Dysmenorrhea 0.9; Other Pain Relief 2.9
Urinary & Reproductive	5%	390.1	Gynaecological 225.6; Urinary Condition 146.5; Urology Male Condition 18.1

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** CHC 1 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical devices share of respective CHC 1 category value

Europe Medical Devices Performance by top CHC 2 Segments (2/2)

Antihemorrhoids account for > € 90 Mn in sales and lead the circulatory segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn)
Ear Care	2%	150.7	Not Available
Mouth Treatment	2%	112.7	Other Mouth Treatment 62.5; Mouth Infection 49.3; Fluoride Products 0.9
Circulatory	1%	106.3	Antihemorrhoids 91.06; Chloesterol Regulating 15.20; Other Circulatory 0.08
Weight Loss	1%	85.3	Not Available
Other Miscellaneous	0%	18.2	Not Available
Miscellaneous	0%	2.8	Not Available
Habit Treatment	0%	0.0	Smoking control 0.01; Other Habit 0.00; Anti Alcohol 0.00; Nail Biting 0.00

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** CHC 1 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical devices share of respective CHC 1 category value

Europe Medical Devices Performance by top CHC 2 Segments (1/2)

Nasal saline continues to lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments – Medical Device Value (Units in Mn)
OTC- Medical Device		**702.2**	
Eye Care	25%	178.9	Not Available
CCR	37%	259.0	Nasal Saline 141.2; Sore Throat 57.1; Cough 36.4; Other Respiratory 11.7
Digestive	14%	96.6	Laxatives 39.7; Acid & Heartburn 27.4; Digestive 19.3; Antidiarrhoeals 10.3
Skin Care	7%	51.2	Wound Healing 15.0; Skin Protector/Emollients 11.5; Hand Skin Wound Disinfect 8.2; Wart/Corn Removal 6.4
Pain Relief	8%	52.8	Muscular Pain 36.9; Mouth Pain 15.4; Dysmenorrhea 0.4; Other Pain Relief 0.0
Urinary & Reproductive	3%	22.6	Gynaecological 14.8; Urinary Condition 7.0; Urology 0.8; Male Condition

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** CHC 1 categories based on their Medical devices value sales (in descending order*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

done

Europe Medical Devices Performance by top CHC 2 Segments (2/2)

Antihemorrhoids held largest share in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (Units in Mn)
Ear Care	2%	15.5	Not Available
Mouth Treatment	2%	11.2	Mouth Infection 5.78; Other Mouth Treatment 5.30; Fluoride Products 0.11
Circulatory	1%	7.8	Antihemorrhoids 7.2; Chloesterol Regulating 0.6; Other Circulatory 0.0
Weight Loss	0%	3.5	Not Available
Other Miscellaneous	0%	3.0	Not Available
Miscellaneous	0%	0.1	Not Available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

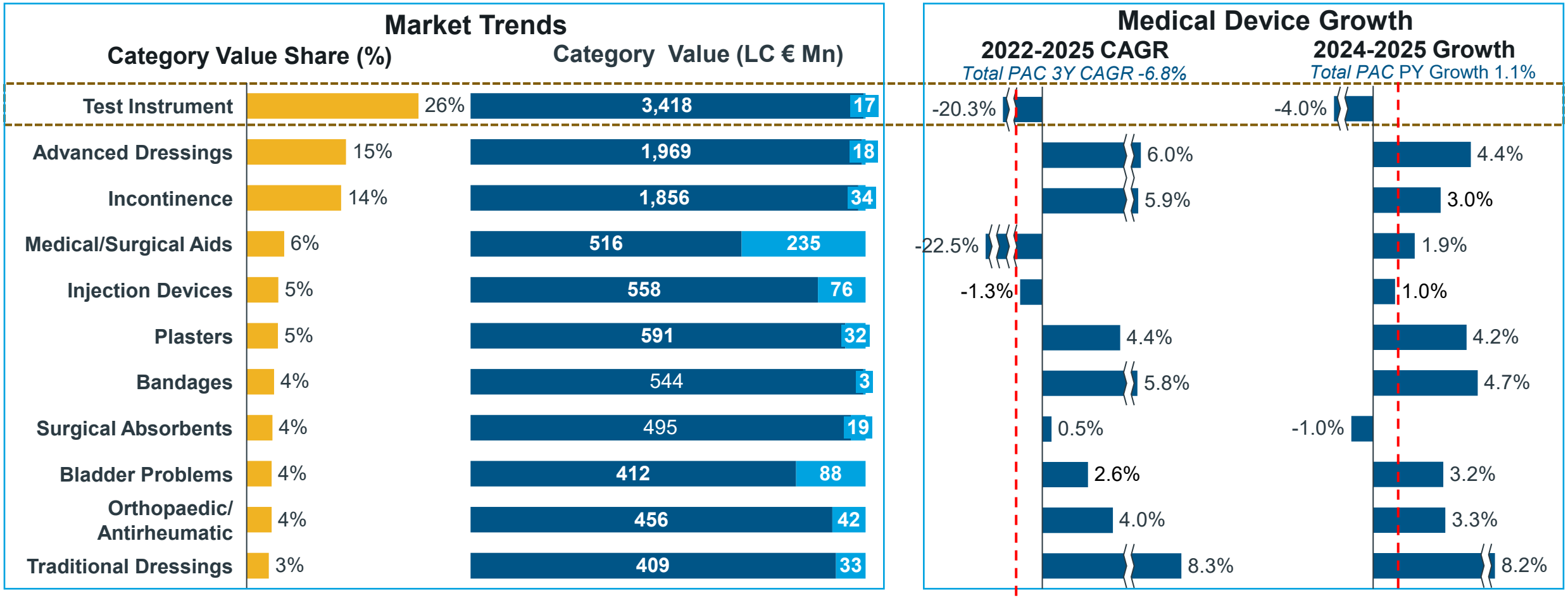
Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** CHC 1 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical devices share of respective CHC 1 category volume

Europe PAC Performance by CHC 1 Category in 2022 (1/2)

*Test instruments lead medical devices values with **3.4 Bn** sales while the overall market shows positive trend both in S-T*

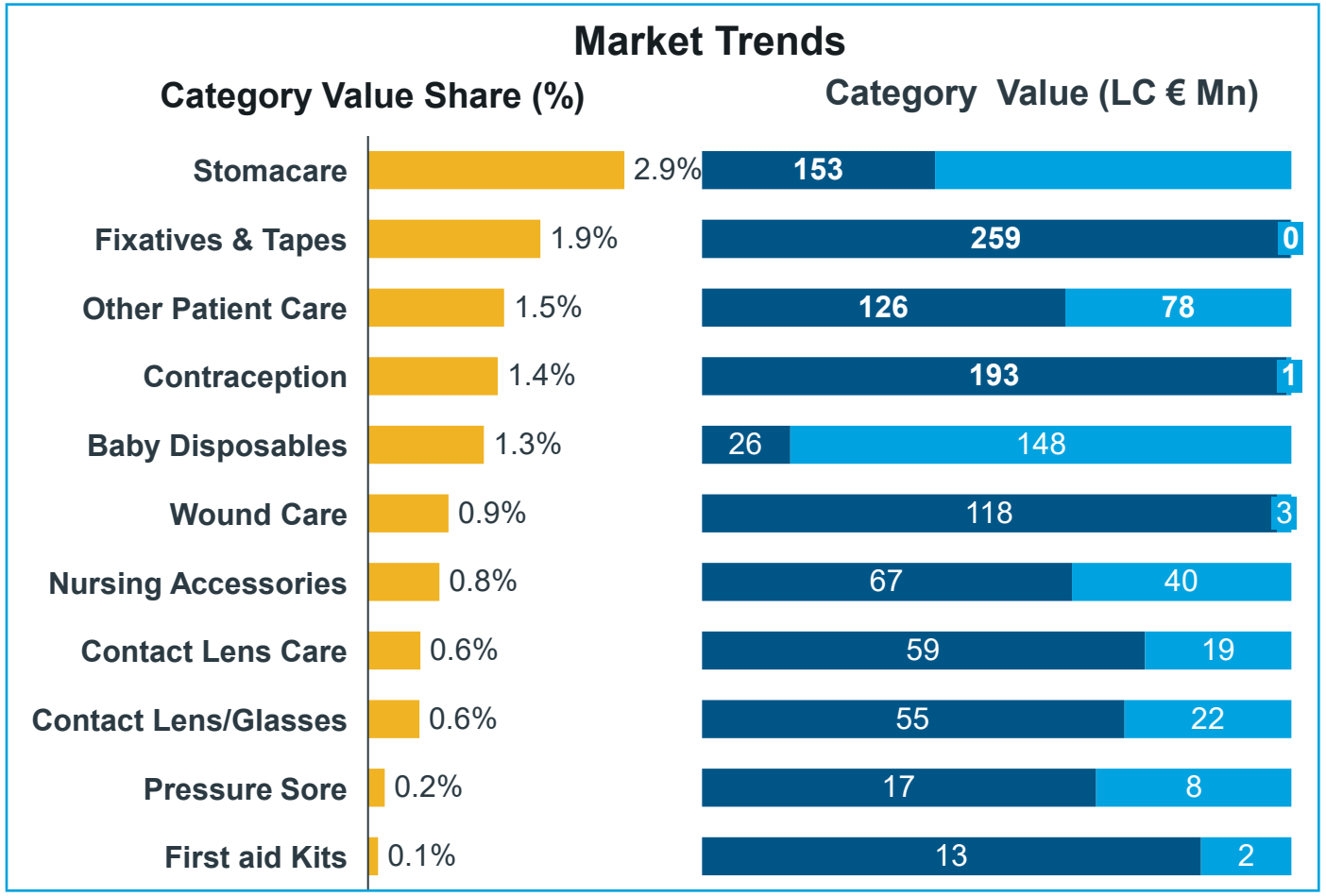


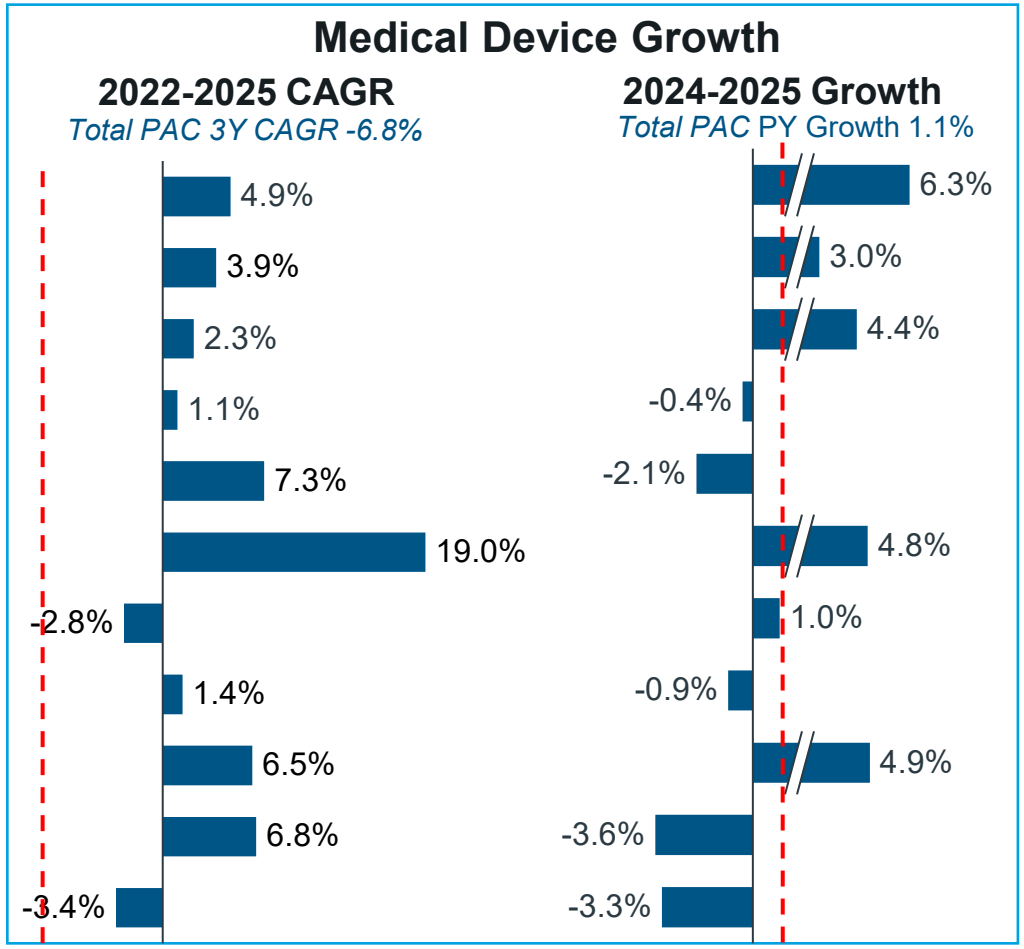
Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments ; L-T – Long term; S-T – Short term

Europe PAC Performance by CHC 1 Category in 2022 (2/2)

All categories recorded dynamic positive growth in L-T except Nursing Accessories & First aid kits



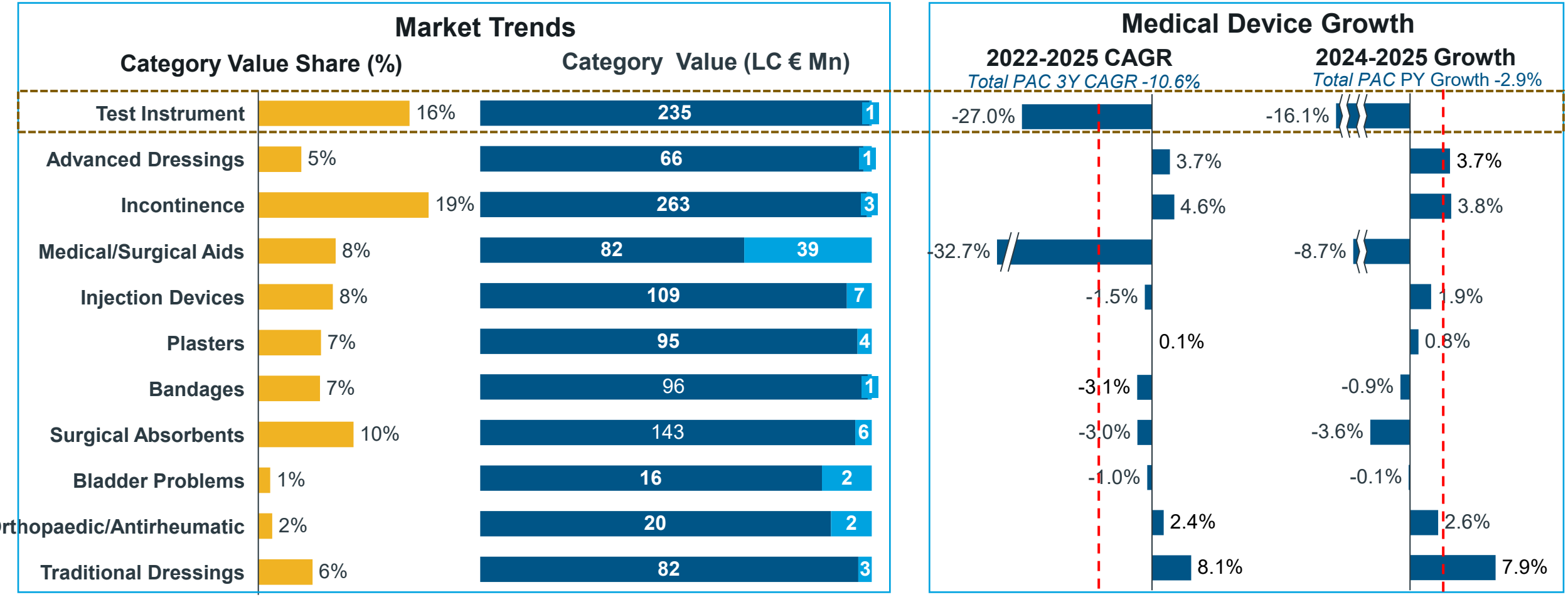


Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025

*Categories with <1% share such as first aid kits, contact lenses & glasses, baby disposables, wound care and pressure sore are excluded; L-T – Long term; S-T – Short term

Europe PAC Performance by CHC 1 Category in 2022 (1/2)

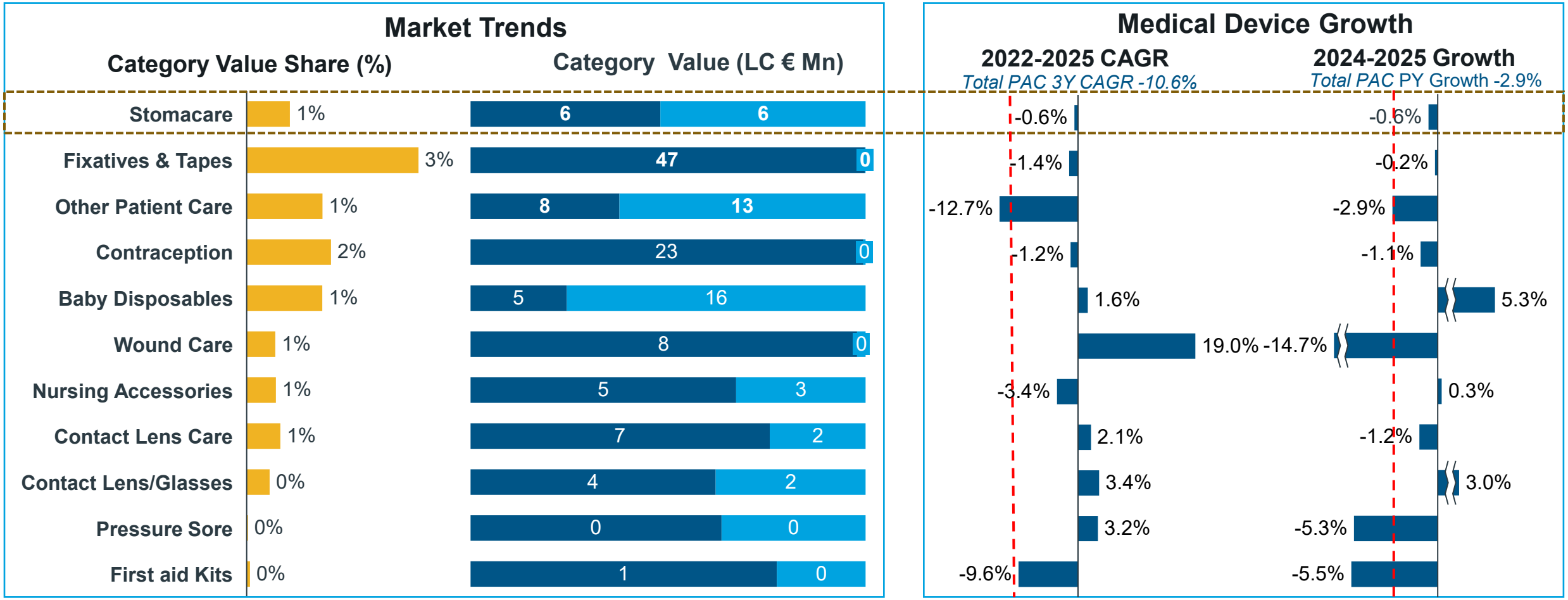
Incontinence category leads in volumes, with positive growth in L-T and S-T



Source: IQVIA Global CH Insights – Sales in Units based on MAT Q2 2025

Europe PAC Performance by CHC 1 Category in 2022 (2/2)

Categories like baby disposables and contact lens/glasses show positive S-T and L-T volume growth



Source: IQVIA Global CH Insights – Sales in Units based on MAT Q2 2025

*Categories with <1% share such as first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Europe Medical Devices Performance by top CHC 2 Segments

Top 5 categories account for >70% value; dominated by Glucose measuring under Test Instrument

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn)
PAC- Medical Device		**12,311.4**	
Test Instrument	28%	3,418.1	Gluc Measuring 2,229.1; Blood Press Monitors 269.0; Coronavirus Test 216.5; Pregnancy Test 206.8
Advanced Dressings	16%	1,968.7	Base Tech 1,551.4; Anti-Infection 304.8; Hyaluron 108.6; Collagen 3.6
Incontinence	15%	1,855.6	Mod Heav Sev Incont. 1,397.4; Light Incontinence 362.0; Bed Sheets/Pads 88.4; Other Incontinence Prds 7.1
Plasters	5%	591.3	Disposable Injection 467.1; Injection Acces. 75.4; Reusable Devices 15.7
Injection Devices	5%	558.1	Compression 285.2; Retention/Fixativ 215.1; Orthopaedic Casting 19.7; Medicated 13.6
Bandages	4%	544.1	Inhalation & Aerosol 199.1; Gloves 110.0; Hot & Cold Packs 75.1; Miscellaneous 41.8

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** Top 5 categories based on their Medical devices value sales (in descending order)*

^ Leading segments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Tech. - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Other Incontin. – Other Incontinence products

Europe Medical Devices Performance by top CHC 2 Segments

Incontinence category dominates in volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (Units in Mn)
PAC- Medical Device		**1,320.6**	
Test Instrument	18%	235.2	Gluc Measuring 93.7; Coronavirus Test 50.0; Pregnancy Test 28.5; Lancets+Sampling 21.8
Advanced Dressings	5%	66.0	Base Tech 48.6; Anti-Infection 9.6; Hyaluron 7.6; Collagen 0.1
Incontinence	20%	263.2	Light Incontinence 126.5; Mod Heav Sev Incont. 120.9; Bed Sheets/Pads 15.5; Other Incontinence Prds 0.3
Plasters	7%	94.7	Plaster Strip 56.9; Special Plaster 31.7; Liquid Plaster 3.4; Plaster Spec. Uses 2.7
Injection Devices	8%	109.4	Disposable Injection 96.5; Injection Acces. 11.6; Reusable Devices 1.3
Bandages	7%	95.5	Retention/Fixativ 75.1; Compression 17.6; Other Bandages 1.4; Orthopaedic Casting 0.9

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading segments that account for >80% medical device share of respective CHC 1 category value

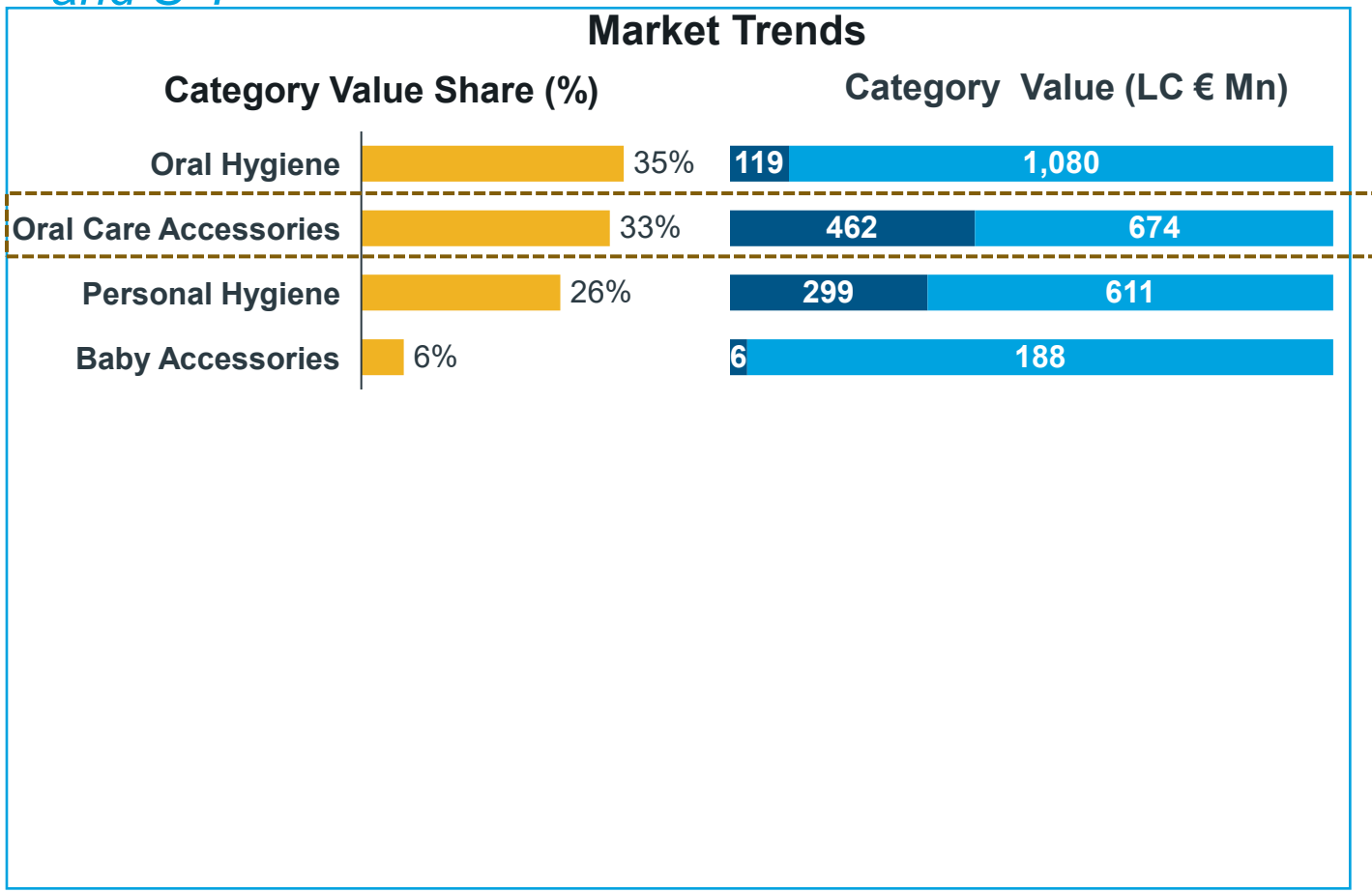
Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

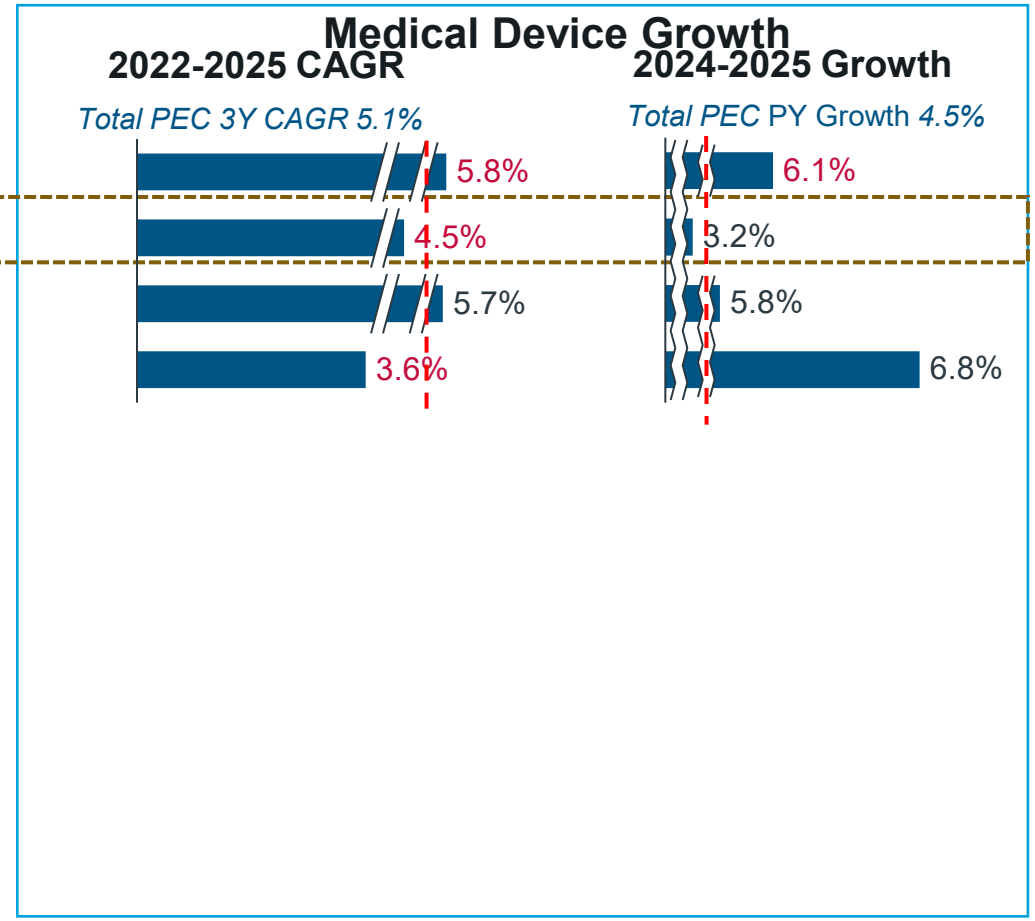
Base Tech. - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Other Incontin. – Other Incontinence products

Europe PEC Performance by CHC 1 Category in 2022

Oral care accessories are leading medical devices value; overall market growing positive both in L-T and S-T



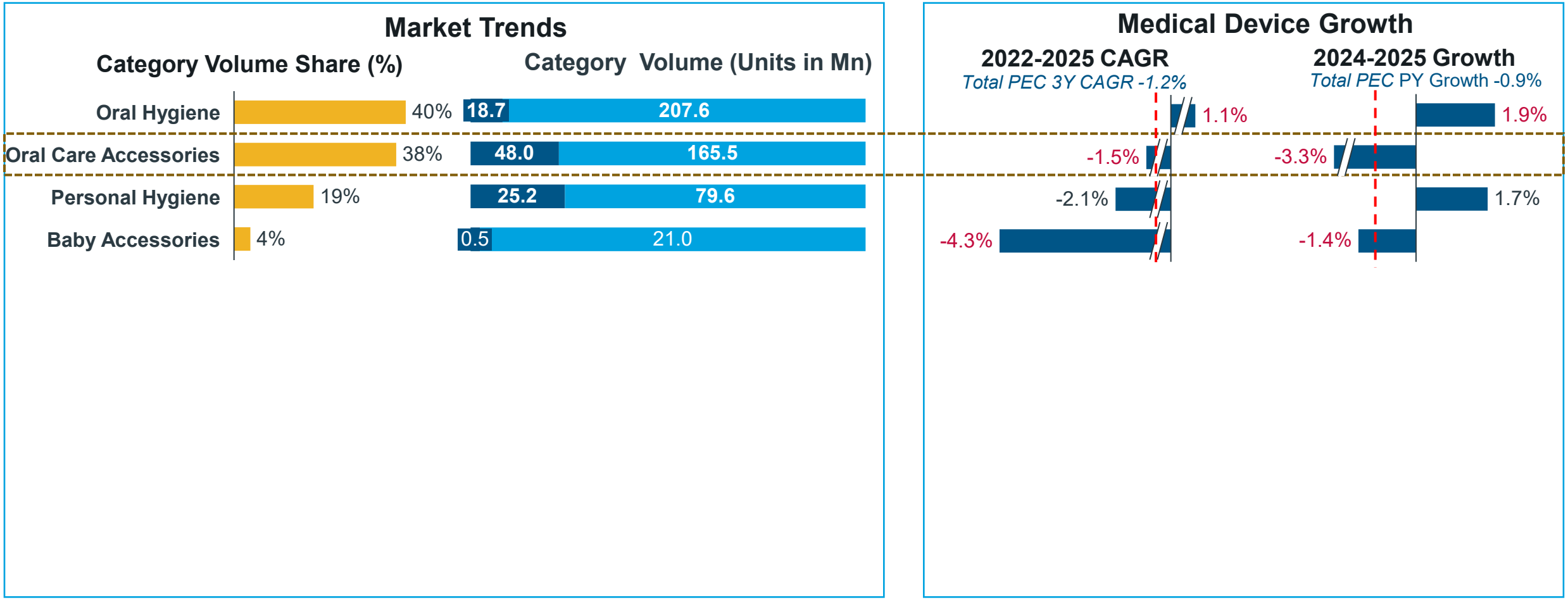


Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights – Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025

Europe PEC Performance by CHC 1 Category in 2022

Oral care accessories continue to lead in medical devices volumes as well



Source: IQVIA Global CH Insights – Sales in Units based on MAT Q2 2025

Medical Device | Non-Medical Device

Europe Medical Devices Performance by top CHC 2 Segments

Denture products are dominating among oral care accessories

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn)
PAC- Medical Device		**886.2**	
Oral Care Accessories	52%	462.4	Denture Products 439.7; Other Oral Care Acces. 10.6; Toothbrushes 8.1; Interdental Brushes 2.8
Personal Hygiene	34%	299.1	Intimate Hygiene 292.4; Hand Hygeine w/o Soap 5.9; Foot Hygiene 0.8
Oral Hygiene	13%	118.8	Toothpastes 110.1; Mouthwashes 7.4; Other Oral Care 1.3
Baby Accessories	1%	5.8	Dummies/Pacifiers/Teeth 3.4; Feeding Bottles &Acces. 2.4

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading segments that account for >80% medical device share of respective CHC 1 category value

Europe Medical Devices Performance by top CHC 2 Segments

Denture products under oral care accessories continue to lead in volumes as well

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn)
PAC- Medical Device		**92.4**	
Oral Care Accessories	52%	48.0	Denture Products 45.7; Other Oral Care Acces. 1.1; Toothbrushes 0.6; Interdental Brushes 0.5
Personal Hygiene	27%	25.2	Intimate Hygiene 23.1; Hand Hygeine w/o Soap 1.9; Foot Hygiene 0.2
Oral Hygiene	20%	18.7	Toothpastes 17.7; Mouthwashes 0.9; Other Oral Care 0.1
Baby Accessories	1%	0.5	Dummies/Pacifiers/Teeth 0.4; Feeding Bottles &Acces. 0.1

Source: IQVIA Global CH Insights – Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading segments that account for >80% medical device share of respective CHC 1 category volume

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Germany Medical Devices – Market Dynamics

Germany Medical Devices Performance Overview

Medical devices grew in latest year with value rising to €4.8 Bn in 2025

36%

Medical device share of total CH value in 2025

Long –term Growth

-0.4% by value

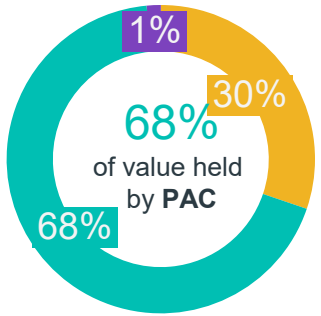
-2.4% by volume

Short –term Growth

3.7% by value

0.8% by value

Medical Devices – €4.8 Bn (2025)



Long-term Growth (Value)

-3.3%	7.1%	9.3%
PAC	OTC	PEC

Medical Devices Categories

67%

Contribution to total new pack launches in last 2\3 years; **Patient care** accounts for **96%** of new pack launches

Medical Devices Innovation

Advanced Dressings

26% Share of total PAC values in 2025; Dominated by **Base tech**

Long-term Growth

10.5% by value

PAC (Patient care)

Eye Care

30% Share for total OTC value in 2025

Long-term Growth

8.1% by value

OTC (Over-the-Counter)

Personal Hygiene

83% *Share of total PEC value share in 2025; Dominated by* ***Intimate hygiene***

Long term Growth

10.5% by value

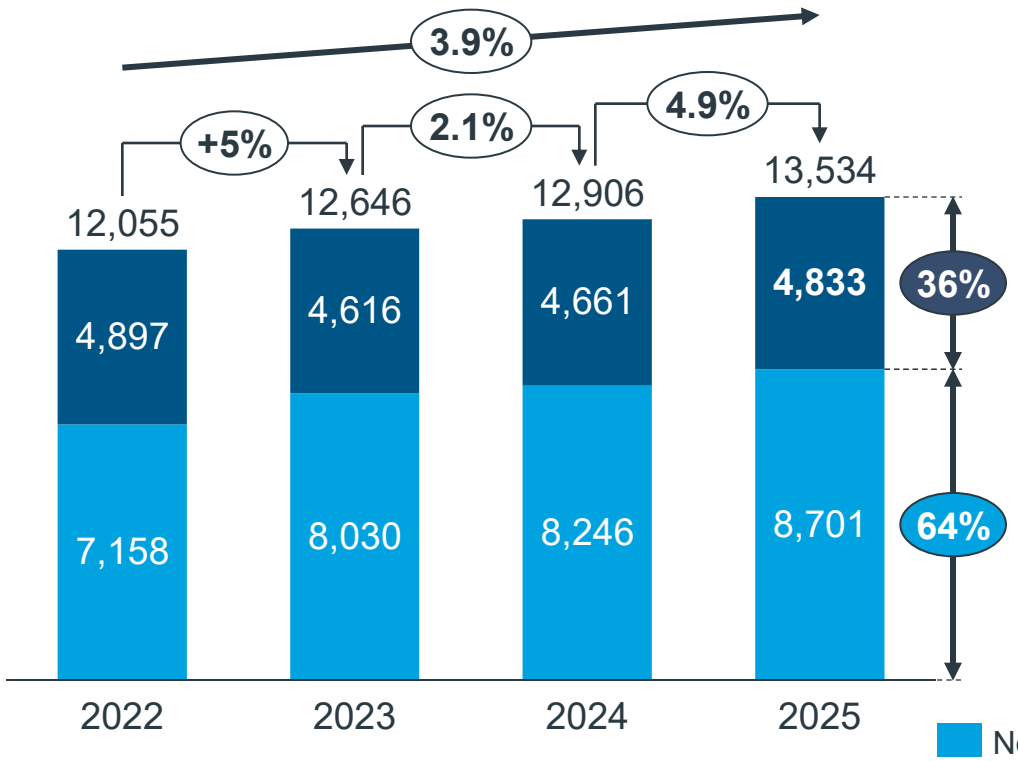
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

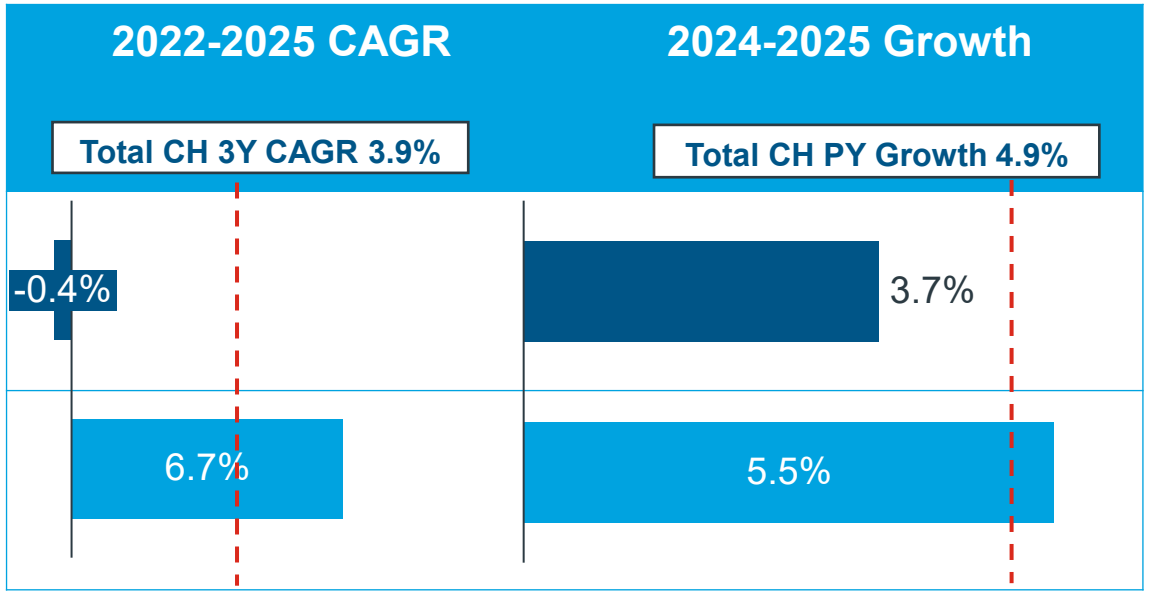
Germany CH Market Size & Growth

Medical devices market recovers into growth mode in the recent year and is valued at € 4.8bn

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

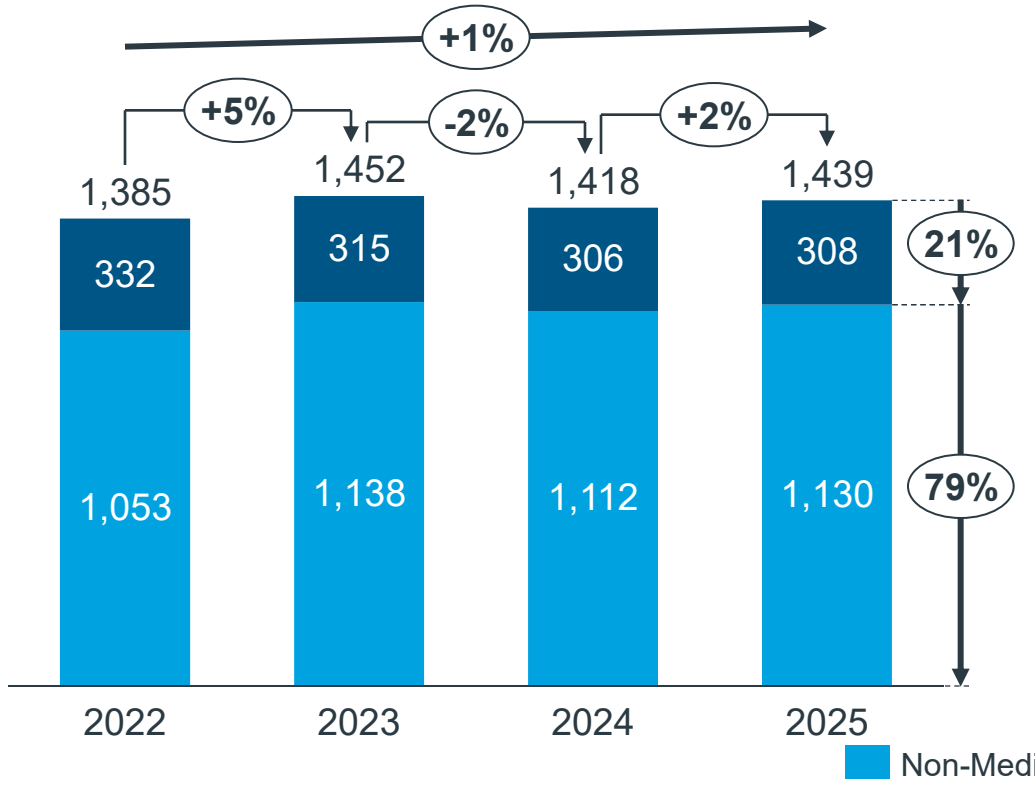


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

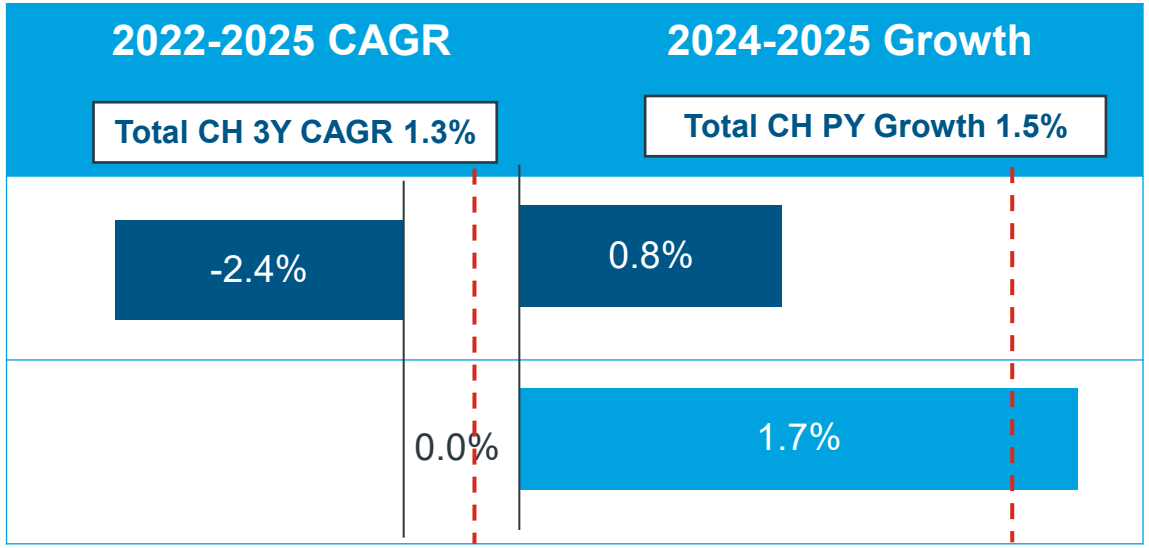
Germany CH Market Volume & Growth

Medical devices represent 21% of the volume share, subdued volume growth in the latest year

Market Volume (Mn Units), and Latest Volume Share (%)



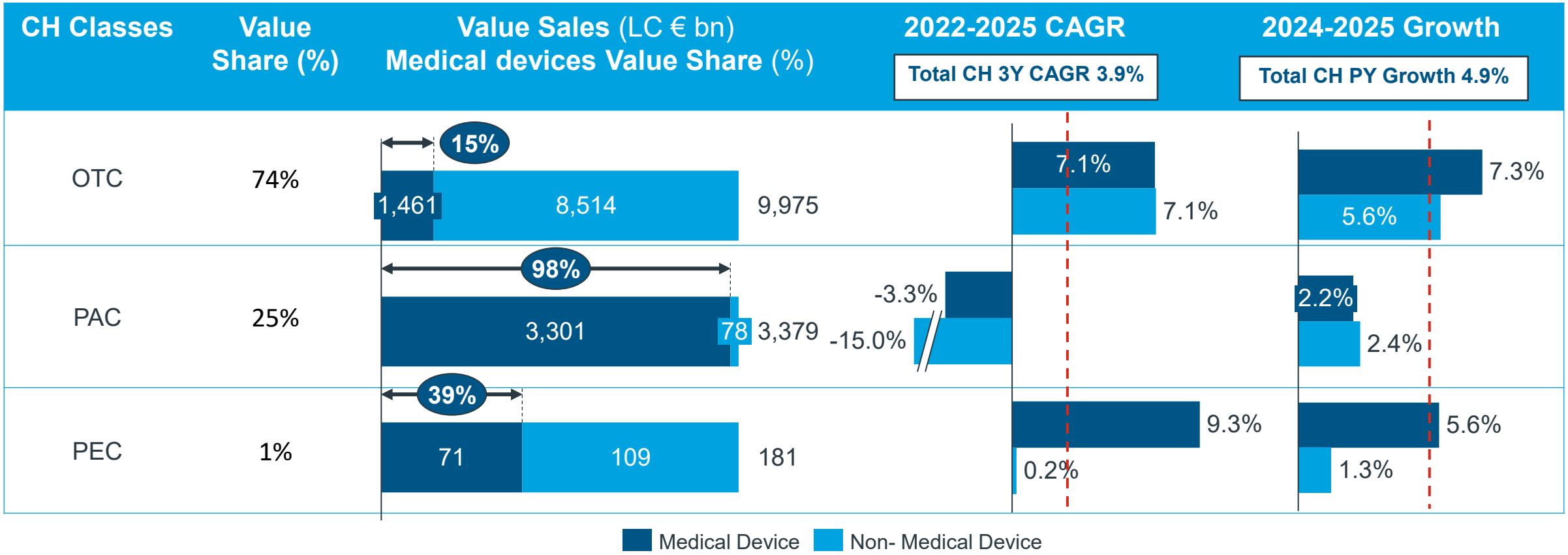
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Germany CH Performance by Classes

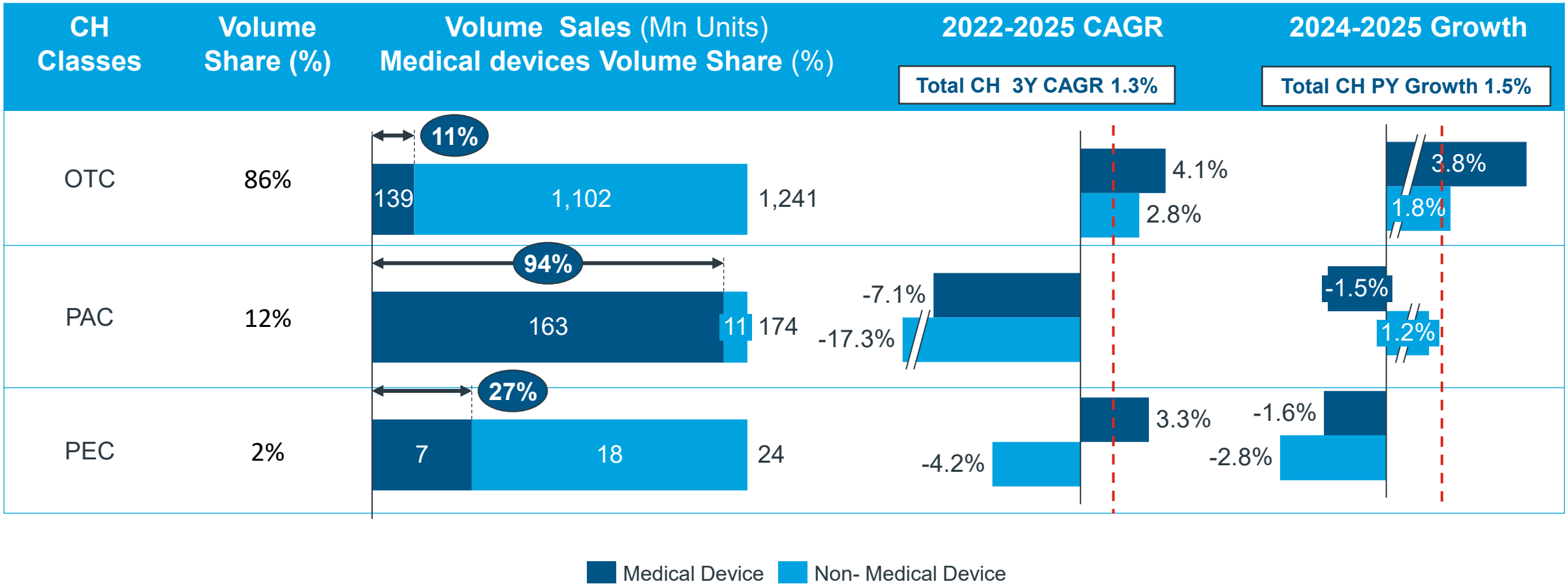
PAC has the highest penetration of medical devices; however, OTC and PEC witness stronger growth



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Germany CH Performance by Classes

PAC dominates in volumes as well; however, OTC sees a strong growth of medical devices



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Germany Medical Devices Packs & New Launches

Majority of the Medical devices new launches come from Patient Care category in last 3 years

Category	Total Packs*			New Launches**		
CH Total	41,667	20,987	**62,654**	9,381	4,649	**14,030**
OTC	1,620	11,723	**13,343**	321	2,498	**2,819**
Patient Care	39,836	5,878	**45,714**	9,010	1,376	**10,386**
Personal Care	211	3,386	**3,597**	50	775	**825**

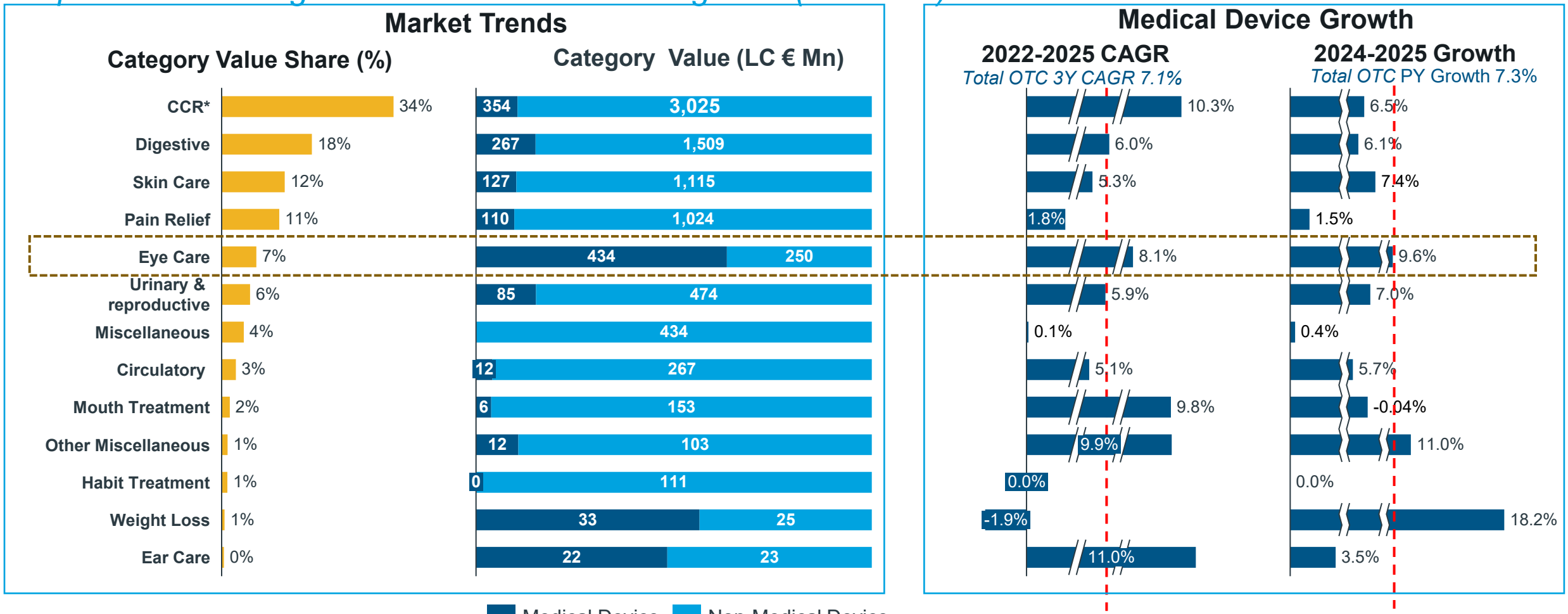
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Germany OTC Performance by CHC 1 Category in 2025

Although CCR dominates with 34% market share, eyecare contributes 7% and is important as it represents the largest Medical Device subsegment (€434 Mn)

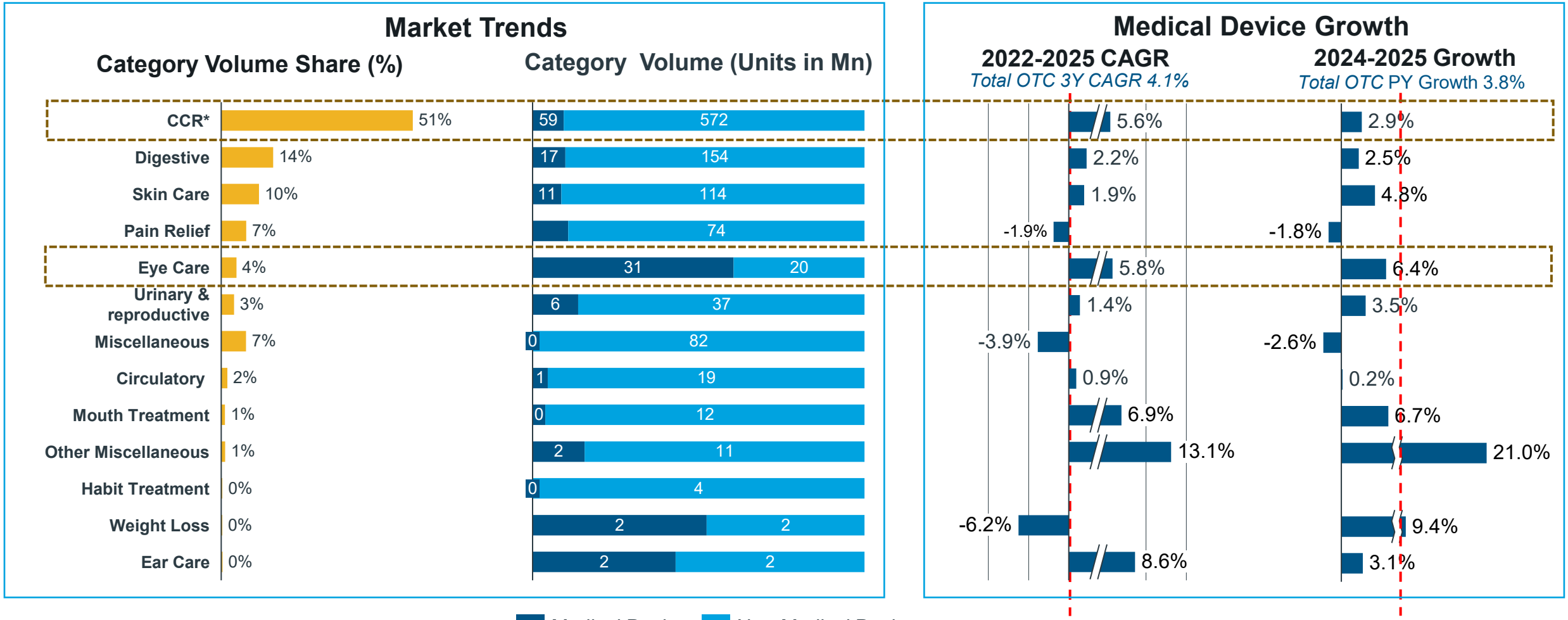


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Germany OTC Performance by CHC 1 Category in 2025

Medical devices are penetrated mainly in eye care and CCR, with promising growth opportunities



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products
Categories with <1% share such as Ear care and Habit treatment are excluded

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Germany Medical Devices Performance by top CHC 2 Segments

The top 6 categories represent >90% of the values, leading with Eye care followed by nasal saline

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC-Medical device		**1,460.8**	
Eye Care	30%	433.8	Not available
CCR	24%	354.0	Nasal Saline 149.8; Sore Throat 123.8; Cough 46.6; Other Respiratory 18.2
Digestive	18%	267.1	Laxatives 145.8; Digestive 99.1; Acid & Heartburn 19.4; Antidiarrhoeals 2.8
Skin Care	9%	126.8	Wound Healing 51.1; Wart/Corn Removal 23.5; Hand Skin Wound Disinfect 20.6; Scar & Keloid 13.4
Pain Relief	8%	109.8	Muscular Pain 102.9; Mouth Pain 5.4; Dysmenorrhea 1.5
Urinary & Reproductive	6%	84.7	Gynaecological 43.4; Urinary Condition 40.1; Urology Male Condition 1.2

Source: IQVIA Global CH Insights – Sales in Local Currency €uros, based on MAT Q2 2025

*Top 6 categories based on their Medical devices value sales (in descending order)

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Germany Medical Devices Performance by top CHC 2 Segments

Antihaemorrhoids is the largest subsegment within circulatory

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Weight Loss	2%	32.7	Not available
Ear Care	1%	21.7	Not available
Other Miscellaneous	1%	12.4	Not available
Circulatory	1%	11.6	Antihemorrhoids 10.5; Chloesterol Regulating 0.1; Other Circulatory Prd. 1.0
Mouth Treatment	1%	6.1	Other Mouth Treatment 4.9; Mouth Infection 1.2
Miscellaneous	0%	0.1	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Germany Medical Devices Performance by top CHC 2 Segments

Nasal saline in CCR, laxatives in digestive, and muscle pain products in pain relief lead in volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC-Medical device		**139.4**	
Eye Care	22%	30.5	Not available
CCR	43%	59.4	Nasal Saline 26.1; Sore Throat 21.4; Cough 8.7; Other Respiratory 1.9
Digestive	12%	16.9	Digestive 7.6; Laxatives 6.5; Acid & Heartburn 2.5; Antidiarrhoeals 0.2
Skin Care	8%	10.8	Wound Healing 5.6; Wart/Corn Removal 1.5; Hand Skin Wound Disinfect 1.4; Scar & Keloid 0.7
Pain Relief	6%	8.9	Muscular Pain 8.2; Mouth Pain 0.2; Dysmenorrhea 0.5
Urinary & Reproductive	4%	5.8	Urinary Condition 2.9; Gynaecological 2.9; Urology Male Condition 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Germany Medical Devices Performance by top CHC 2 Segments

Antihaemorrhoids is the largest subsegment within circulatory in terms of volume as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Weight Loss	1%	1.8	Not available
Ear Care	1%	1.8	Not available
Other Miscellaneous	1%	2.0	Not available
Circulatory	1%	0.9	Antihemorrhoids 0.8; Chloesterol Regulating 0.1
Mouth Treatment	0.3%	0.5	Other Mouth Treatment 0.4; Mouth Infection 0.1
Miscellaneous	0%	0	Not available
Habit Treatment	0%	0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

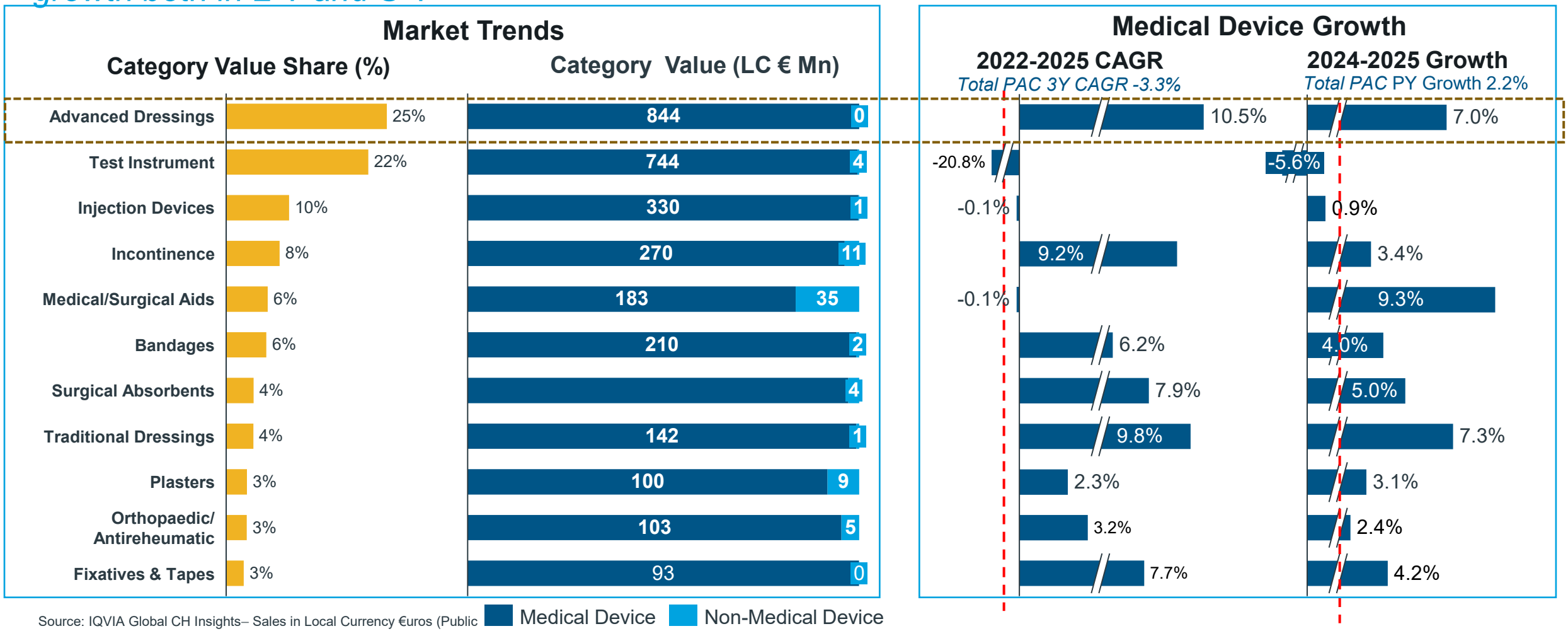
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Germany PAC Performance by CHC 1 Category in 2025 (1/2)

Advanced dressing products boost medical device market sales to €844 million, fueled by strong growth both in L-T and S-T



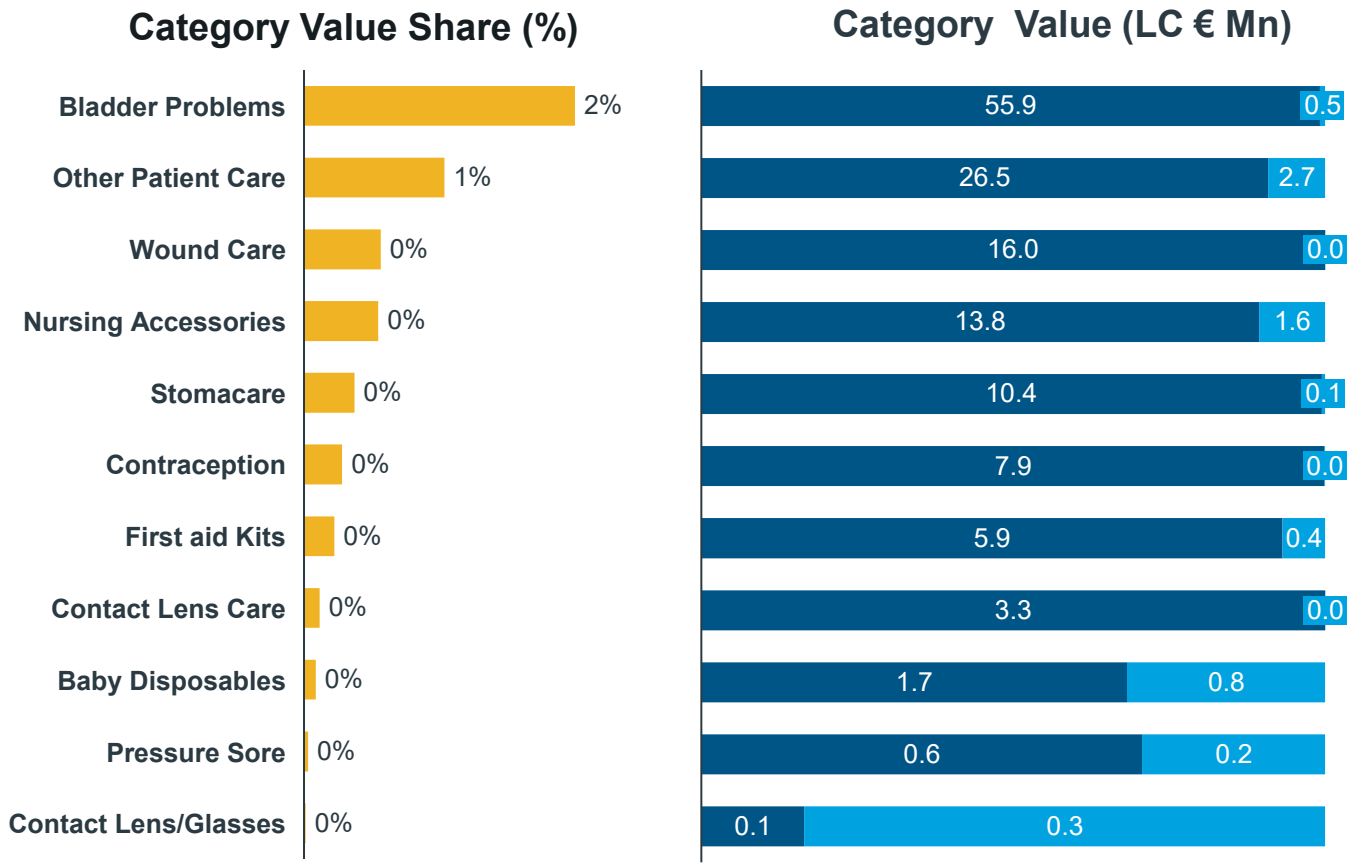
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

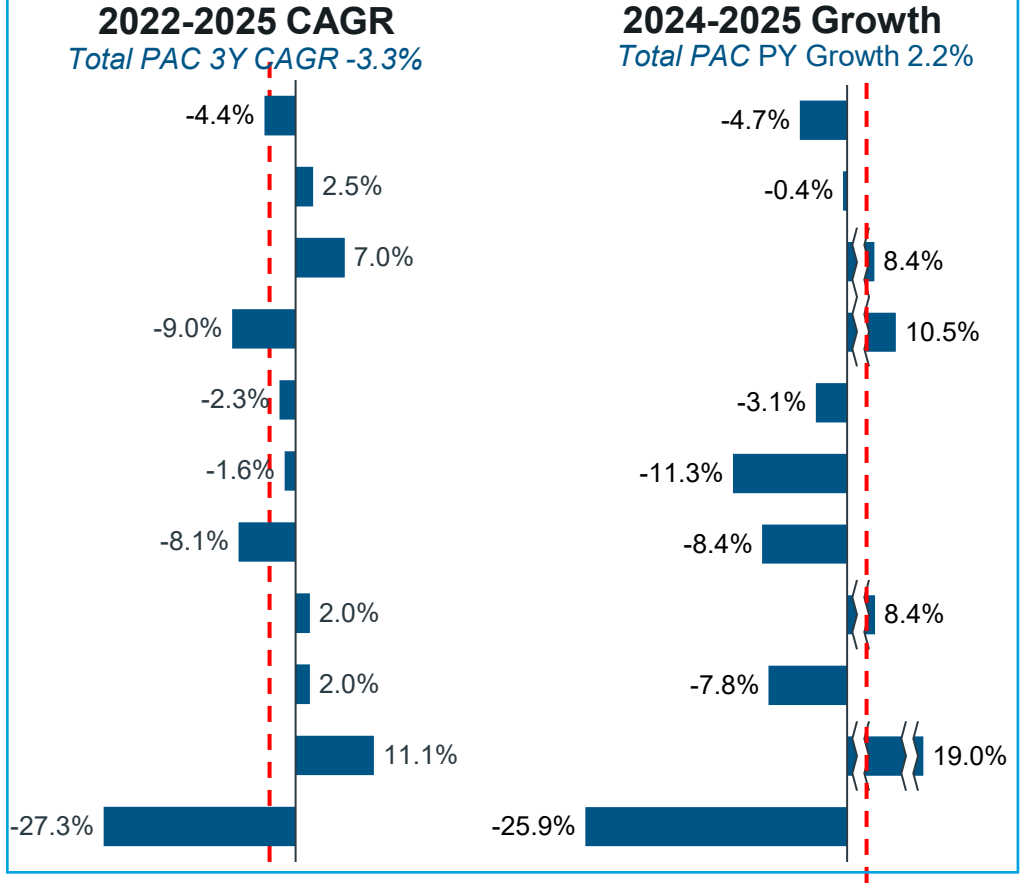
Germany PAC Performance by CHC 1 Category in 2025 (2/2)

Medical devices experienced favorable growth in the short term

Market Trends



Medical Device Growth

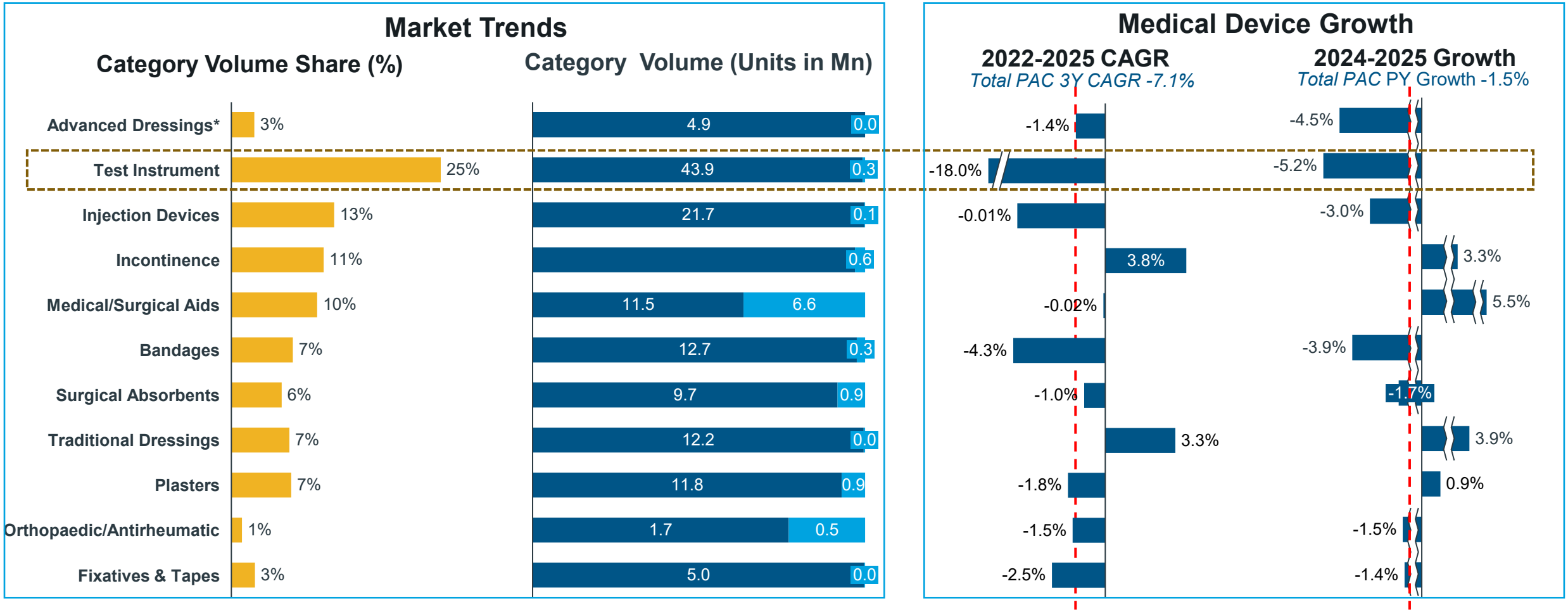


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Germany PAC Performance by CHC 1 Category (1/2)

Test instruments dominate in terms of volume, while the value is generated by Advanced Dressings



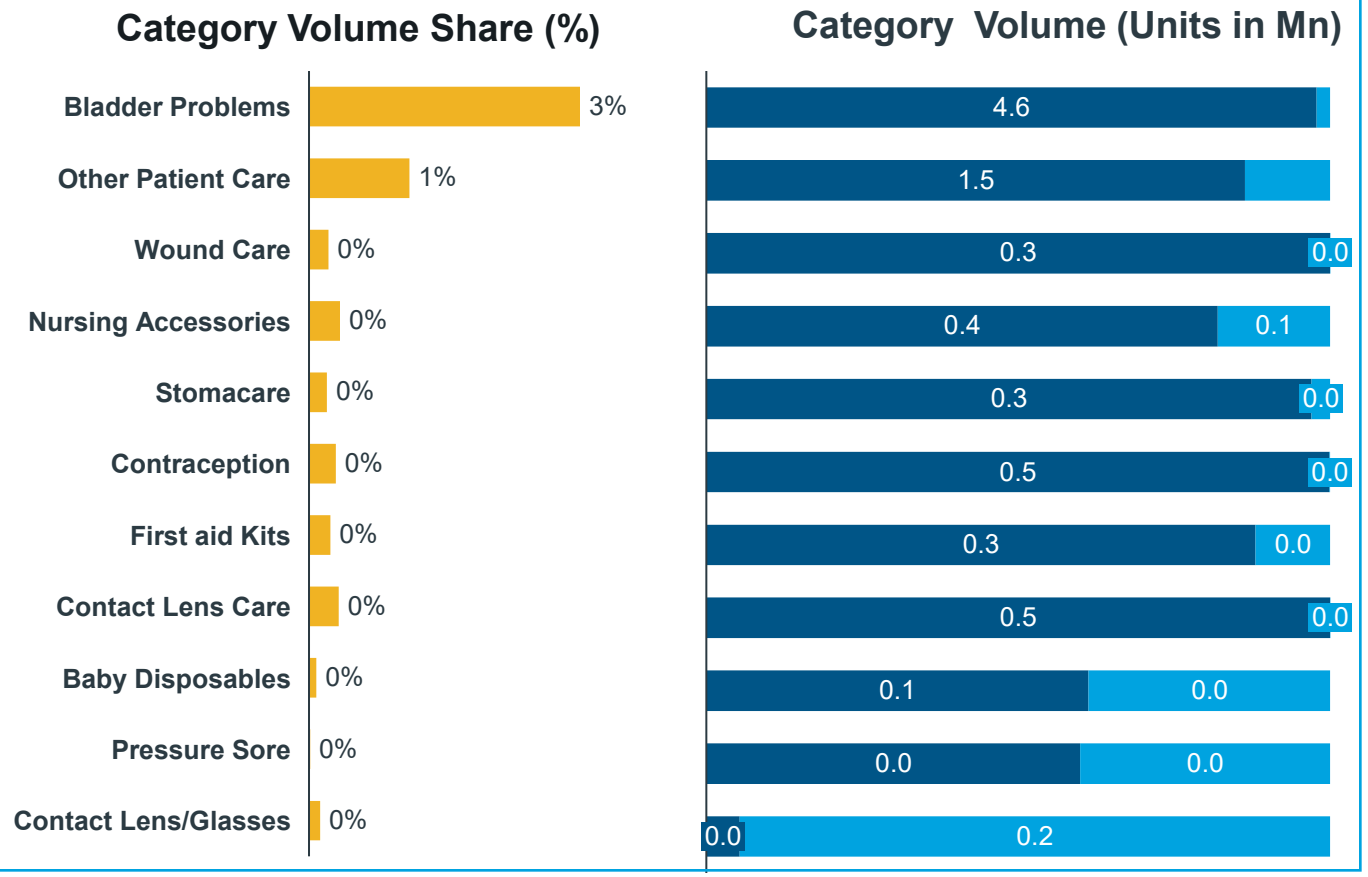
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

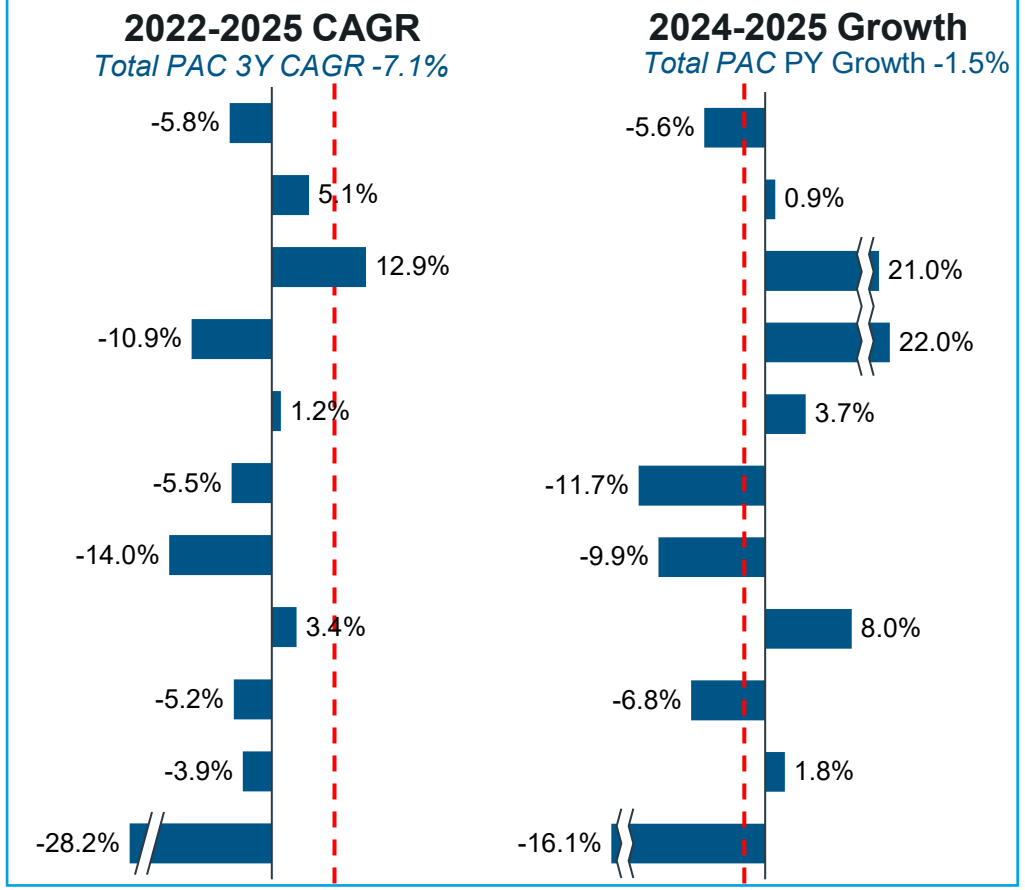
Germany PAC Performance by CHC 1 Category (2/2)

Sales of contact lenses and glasses have been declining in the past three years

Market Trends



Medical Device Growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Germany Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~80% of values; dominated by base tech in advanced dressings and glucose measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC-Medical Devices		**3301.1**	
Advanced Dressings	26%	844.1	Base Tech 652.4; Anti-Infection 190.3; Collagen 1.3; Hyaluron 0.0
Test Instrument	23%	743.5	Gluc Measuring 477.4; Coronavirus Test 63.3; Blood Press Monitors 57.5; Oth Diagnostic Tests 51.7
Injection Devices	10%	329.9	Disposable Injection 247.8; Injection Acces. 69.5; Reusable Devices 12.6
Incontinence	8%	270.2	Mod Heav Sev Incont. 162.0; Light Incontinence 81.3; Bed Sheets/Pads 22.9; Other Incontinence Prds 4.0
Bandages	6%	209.7	Compression 98.7; Retention/Fixativ 84.9; Orthopaedic Casting 13.0; Other Bandages 6.6
Medical/Surgical Aids	6%	183.2	Inhalation & Aerosol 83.6; Gloves 82.0; Hot & Cold Packs 6.9; Surgical Devices 5.3

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Germany Medical Devices Performance by top CHC 2 Segments

Test instruments lead in sales volume, while advanced dressing generates the highest value

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC-Medical Devices		**162.6**	
Advanced Dressings	3%	4.9	Base Tech 4.2; Anti-Infection 0.7
Test Instruments	27%	43.9	Gluc Measuring 18.9; Coronavirus Test 14.0; Multipurpose Test 2.8; Thermometers 2.1
Injection Devices	13%	21.7	Disposable Injection 11.4; Injection Acces. 10.1; Reusable Devices 0.1
Incontinence	12%	18.9	Light Incontinence 9.1; Mod Heav Sev Incont. 8.3; Bed Sheets/Pads 1.5; Other Incontinence Prds 0.1
Bandages	8%	12.7	Retention/Fixativ 8.9; Compression 2.9; Orthopaedic Casting 0.4; Medicated 0.3
Medical/Surgical Aids	7%	11.5	Gloves 5.9; Hot & Cold Packs 2.8; Inhalation & Aerosol 1.8; Miscellaneous 0.5

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

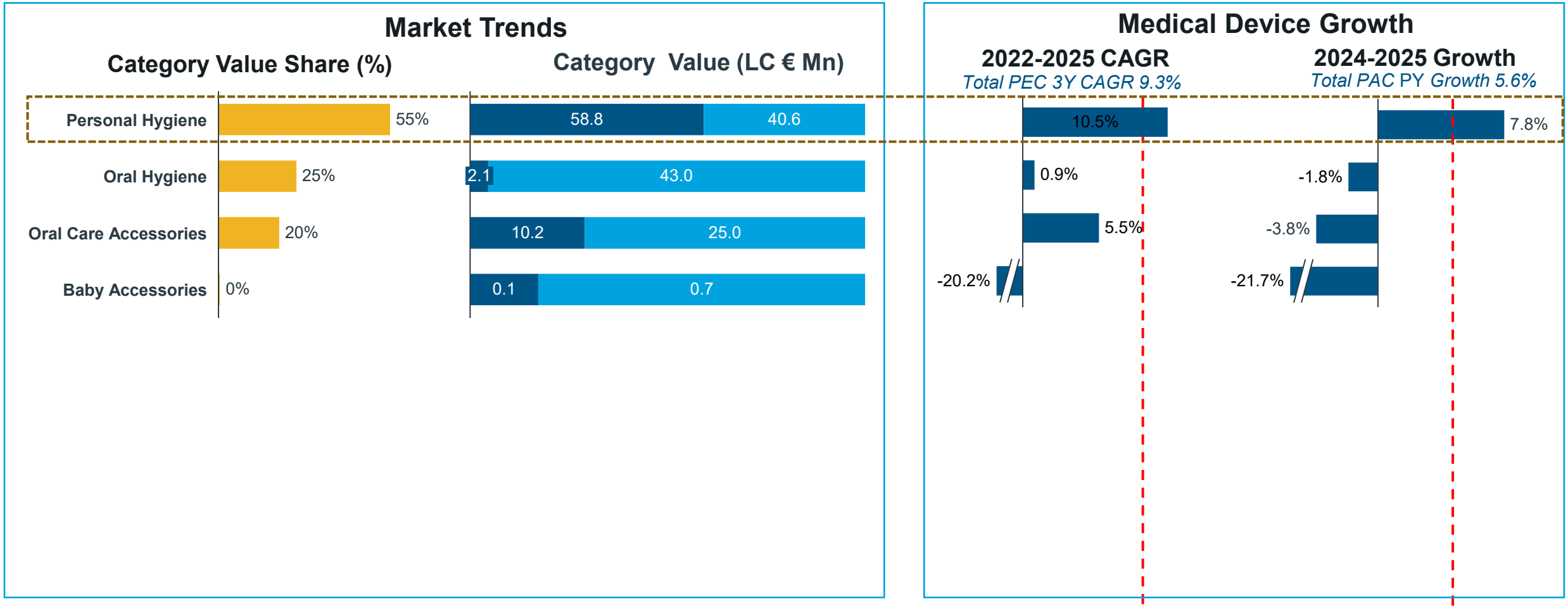
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Germany PEC Performance by CHC 1 Category

Personal hygiene leads medical devices values; outperforming the Personal care growth in L-T & S-T

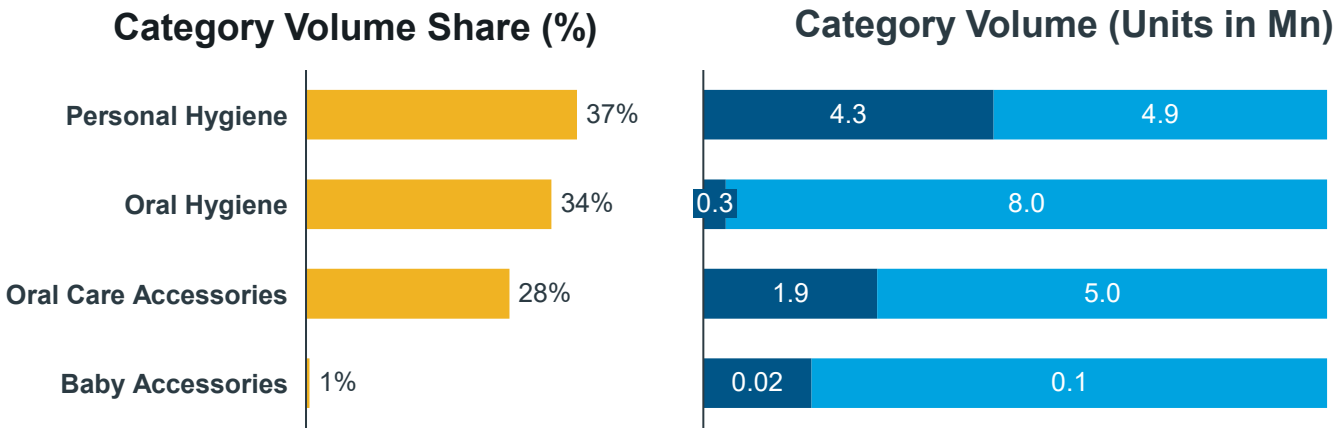


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

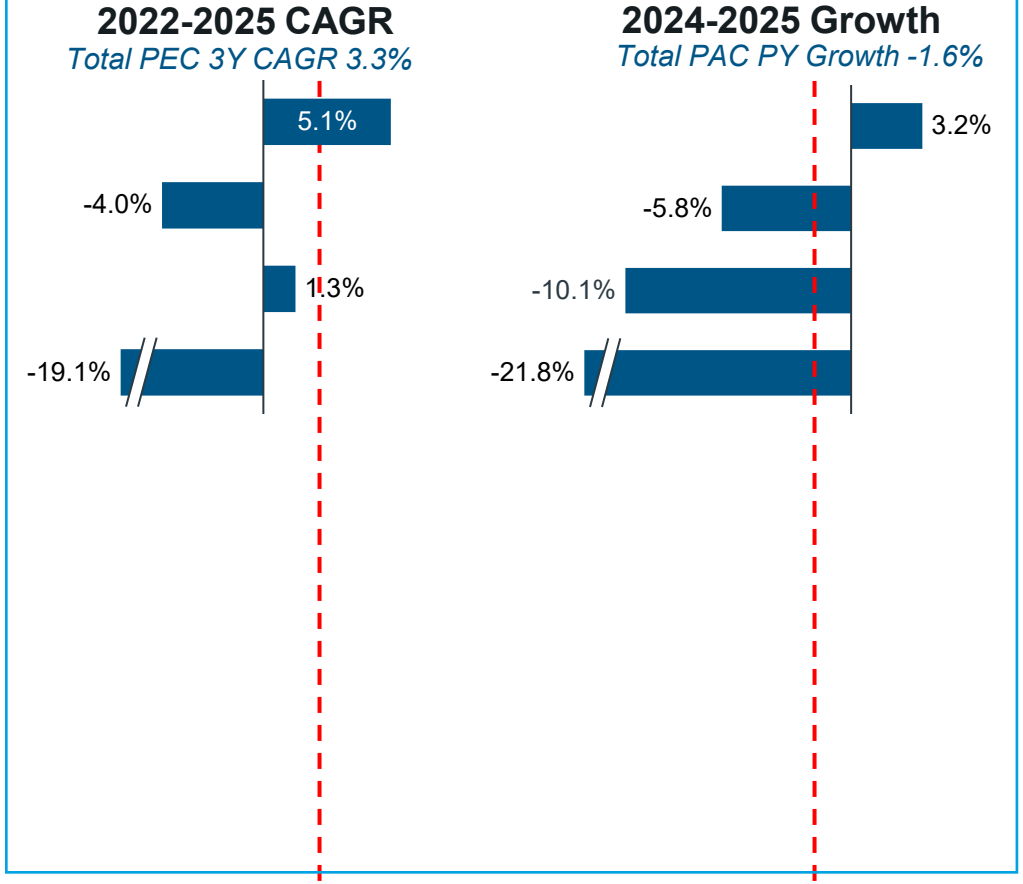
Germany PEC Performance by CHC 1 Category

Personal hygiene continues to lead in volumes as well

OTC Market Trends



Medical Device Growth



Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Germany Medical Devices Performance by top CHC 2 Segments

Personal hygiene products, particularly for intimate care, account for 83% of sale values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC-Medical Devices		**71.2**	
Personal Hygiene	83%	58.8	Intimate Hygiene: 58.8; Hand Hygeine w/o Soap: 0.0; Foot Hygiene: 0.0
Oral Care Accessories	14%	10.2	Denture Products: 9.8; Other Oral Care Acces.: 0.5; Dental Sticks: 0.0; Toothbrushes: 0.0
Oral Hygiene	3%	2.1	Toothpastes: 1.7; Mouthwashes: 0.2; Other Oral Care: 0.2
Baby Accessories	0.2%	0.1	Dummies/Pacifiers/Teeth: 0.1; Feeding Bottles &Acces.: 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Germany Medical Devices Performance by top CHC 2 Segments

Intimate hygiene products continues to lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2022
PEC-Medical Devices		**6.5**	
Personal Hygiene	66%	4.3	Intimate Hygiene 4.3; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	29%	1.9	Denture Products 1.9; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	5%	0.3	Toothpastes 0.3; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.02; Feeding Bottles &Acces. 7.6%

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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France Medical Devices – Market Dynamics

France Medical Devices Performance Overview

Medical devices show overall positive short-term value growth, while OTC and Personal Care segments demonstrate long-term growth in value

44%

Medical device share of total CH value in 2025

Long –term Growth

0.1% by value

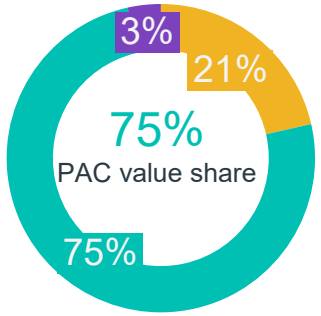
-2.8% by volume

Short –term Growth

3.1% by value

-1.2% by volume

Medical Devices – €3.6 Bn (2025)



Long-term Growth (Value)

-1.3% PAC

5.2% OTC

3.1% PEC

Medical Devices Categories

32%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **80%** of new pack launches

Medical Devices Innovation

Test Instruments

38% *Share of total PAC values in 2025; Dominated by **Gluc Measuring***

Long-term Growth

-5.6% by value

PAC (Patient care)

Eye Care

36% *Share for total OTC value in 2025*

Long-term Growth

4.1% by value

OTC (Over-the-Counter)

Personal Hygiene

48% *Share of total PEC value share in 2025; Dominated by **Intimate hygiene***

Long term Growth

1.3% by value

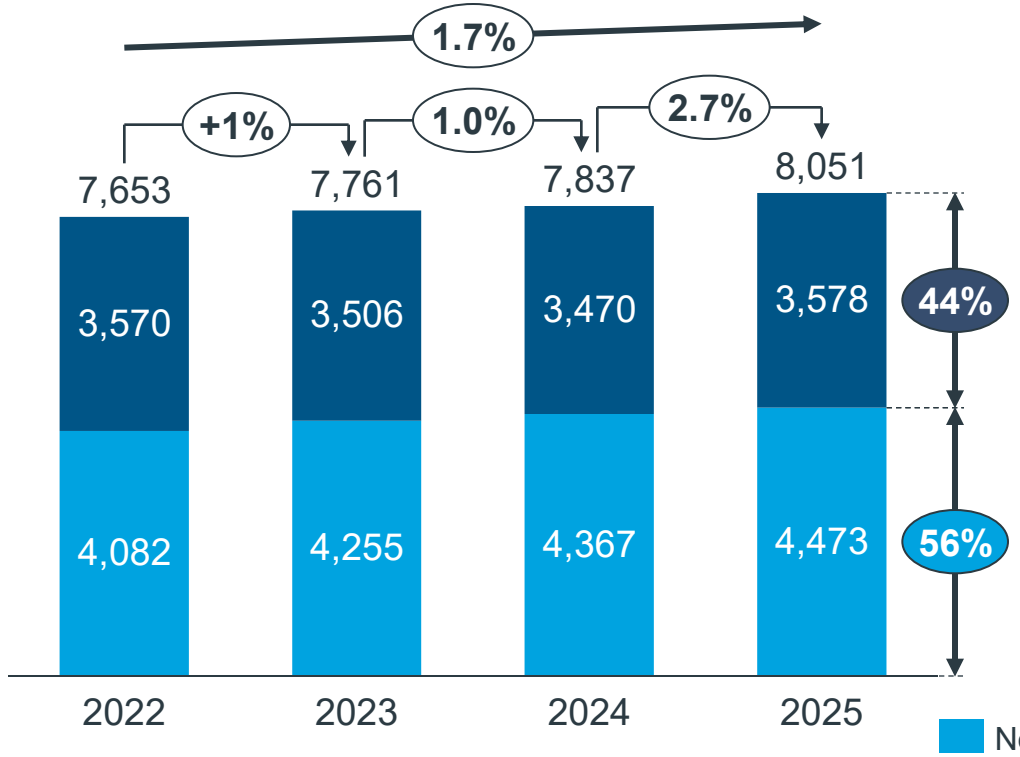
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

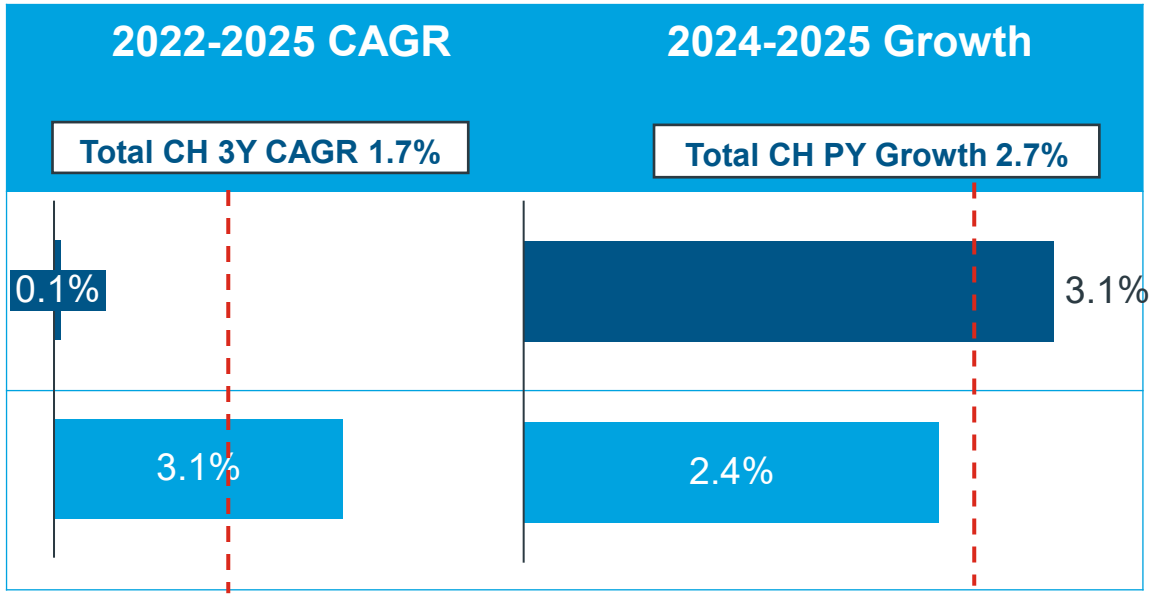
France CH Market Size & Growth

Medical devices account for 44% of total CH value share in 2025 and demonstrates a positive year-on-year growth from 2024 to 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

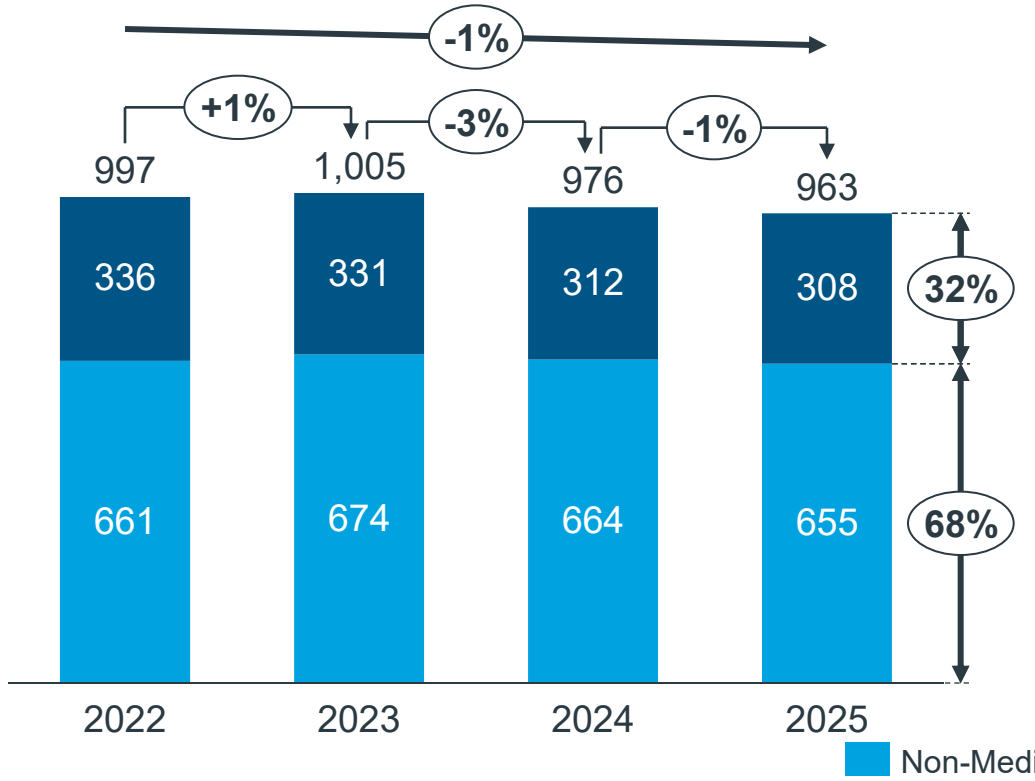


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

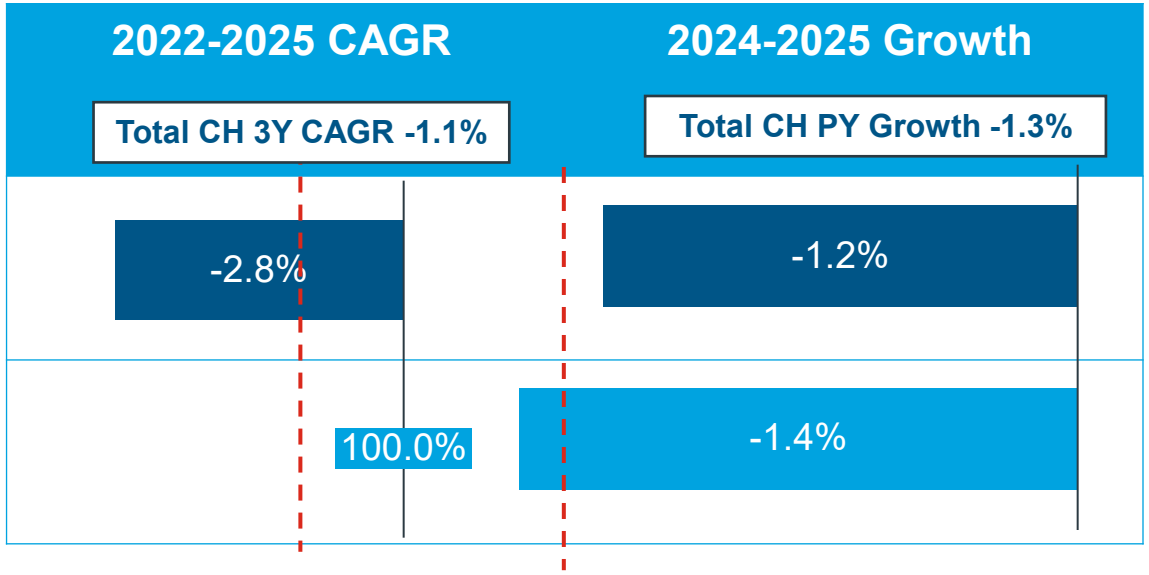
France CH Market Volume & Growth

Medical devices comprise of 32% of total volumes; with the overall market showing negative trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



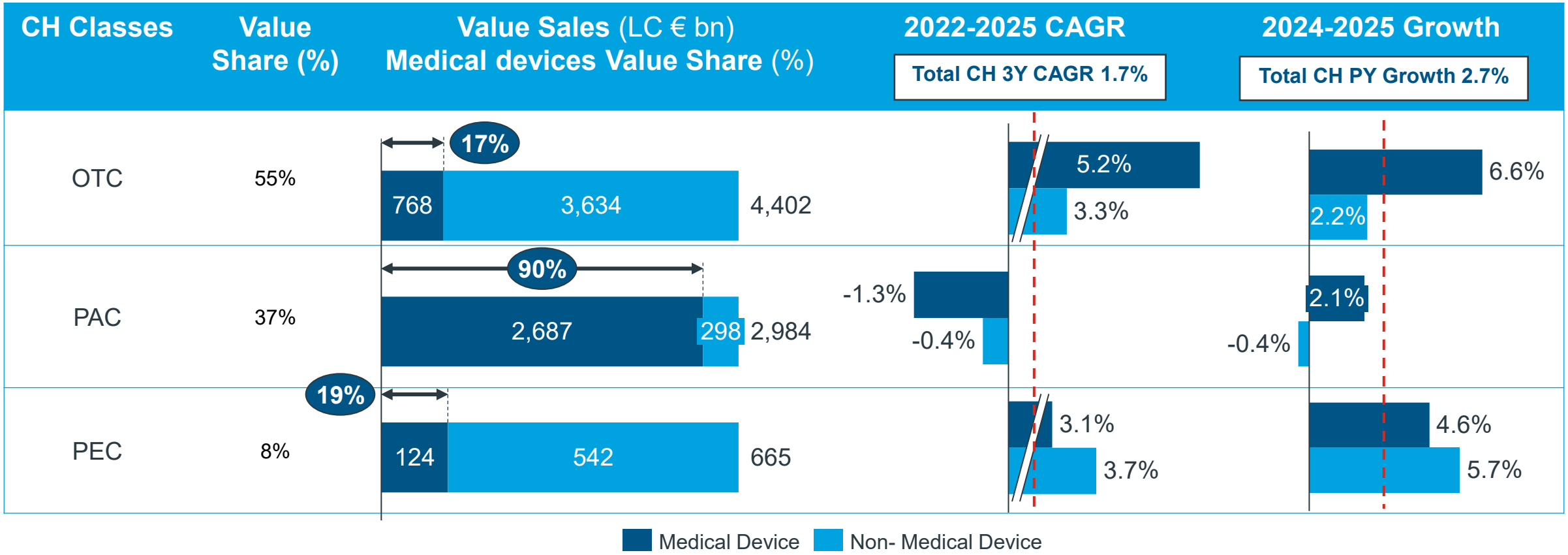
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

France CH Performance by Classes

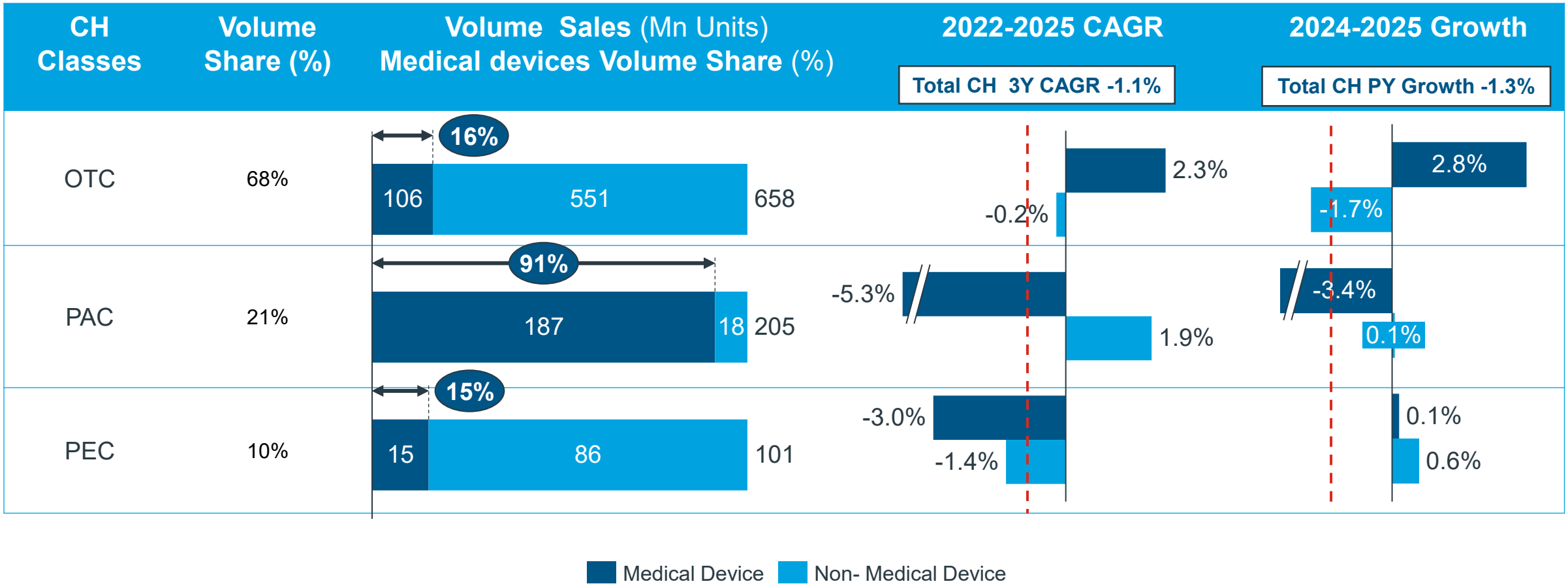
*Patient care segment leads with **€2.7 Bn** and contributes the largest share to the medical devices category, accounting for 90% of its segment value*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

France CH Performance by Classes

Patient Care leads in medical device sales with volume of 187mn units, corresponding to 91% within its segment; OTC records strong growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

France Medical Devices Packs & New Launches

The majority of the Medical devices new launches come from Patient Care category in last 3 years

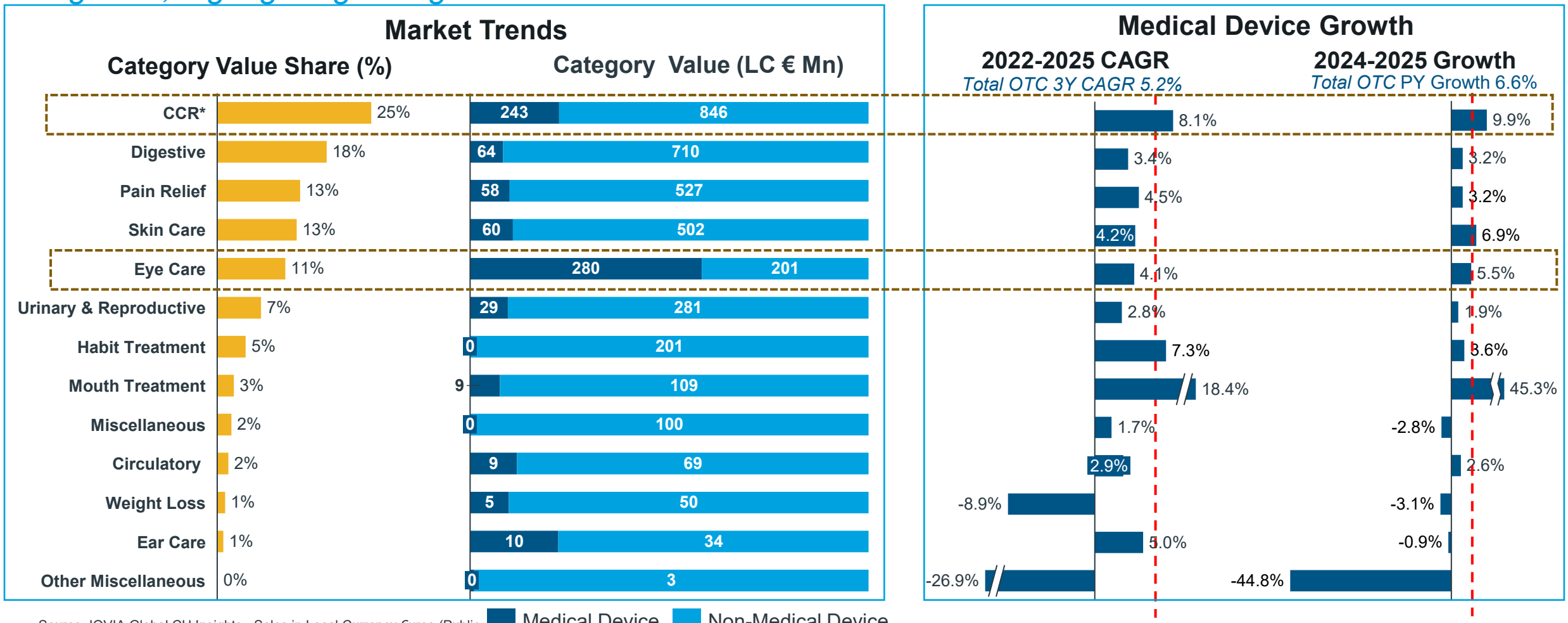
Category	Total Packs*			New Launches**		
CH Total	8,434	17,152	**25,586**	1,501	3,242	**4,743**
OTC	1,102	7,694	**8,796**	243	1,608	**1,851**
Patient Care	7,025	3,874	**10,899**	1,195	668	**1,863**
Personal Care	307	5,584	**5,891**	63	966	**1,029**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

France OTC Performance by CHC 1 Category in 2025

CCR leads the market in total value sales, while eye care adds €280 Mn just within medical devices segment, highlighting its significance

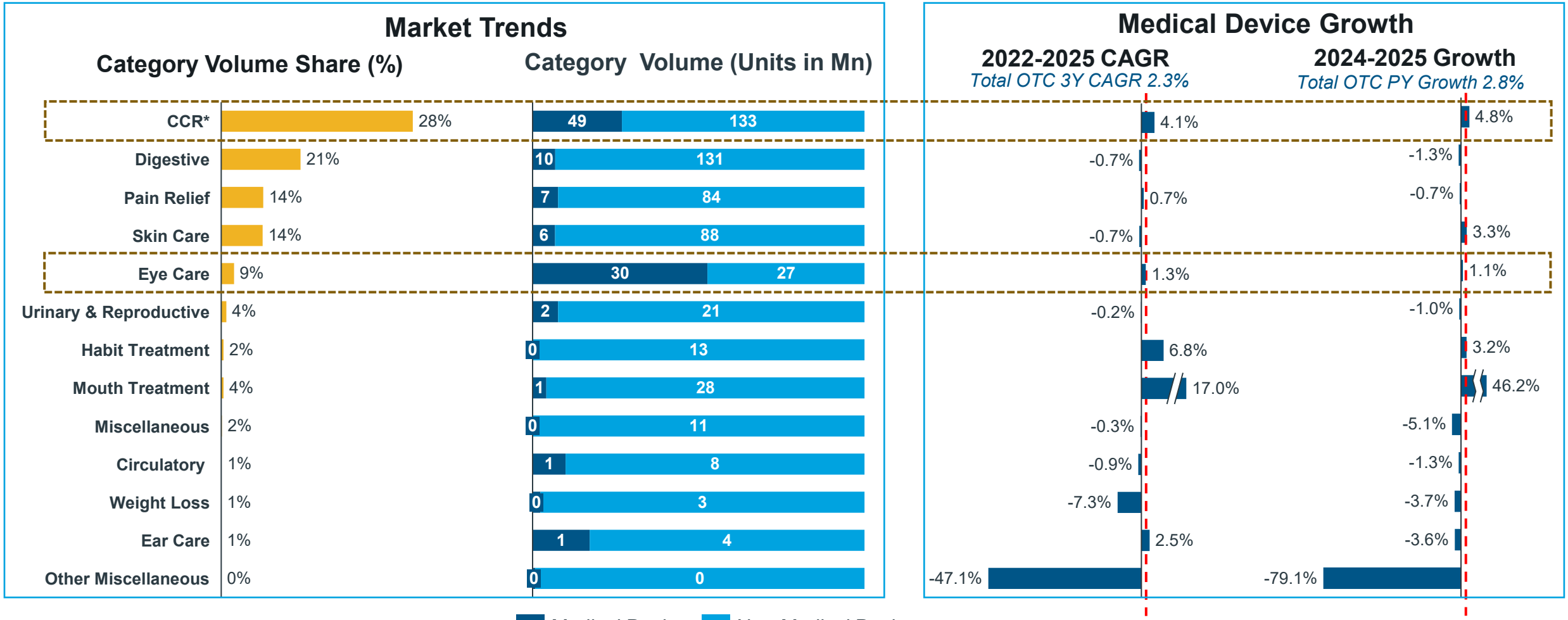


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

France OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume, followed by eye care products



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

France Medical Devices Performance by top CHC 2 Segments

The top 6 categories contribute towards > 95% of values, with eye care as the leading segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**767.6**	
Eye Care	36%	279.8	Not available
CCR	32%	243.1	Nasal Saline 203.0; Cough 24.5; Other Respiratory 7.3; Cold Remedies 4.8
Digestive	8%	63.6	Antidiarrhoeals 24.3; Acid & Heartburn 16.6; Laxatives 15.4; Digestive 7.2
Skin care	8%	60.4	Wart/Corn Removal 23.4; Wound Healing 14.4; Antifungals 8.7; Skin Protector/Emollients 6.8
Pain relief	8%	58.2	Mouth Pain 32.9; Muscular Pain 25.1; Joint Care 0.2; Dysmenorrhea 0.0
Urinary & Reproductive	4%	29.4	Urinary Condition 19.0; Gynaecological 6.2; Urology 4.2; Male Condition

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

France Medical Devices Performance by top CHC 2 Segments

Ear care, circulatory and mouth treatment make up less than 5% of the medical device value share

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	1%	9.6	Not available
Circulatory	1%	9.2	Antihemorrhoids 9.1; Chloesterol Regulating 0.1; Other Circulatory 0.0
Mouth Treatment	1%	8.8	Other Mouth Treatment 7.7; Mouth Infection 1.1; Fluoride Products 0.0
Weight loss	1%	5.4	Not available
Miscellaneous	0%	0.1	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

France Medical Devices Performance by top CHC 2 Segments

Nasal saline under CCR leads in volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**106.4**	
Eye Care	28%	29.7	Not available
CCR	46%	48.9	Nasal Saline 43.7; Cough 3.5; Cold Remedies 0.6; Other Respiratory 0.5
Digestive	9%	9.6	Antidiarrhoeals 3.4; Laxatives 3.0; Acid & Heartburn 2.3; Digestive 1.0
Skin care	6%	6.4	Skin Protector/Emollients 2.4; Wound Healing 1.2; Wart/Corn Removal 1.2; Hand Skin Wound Disinfect 0.8
Pain relief	7%	6.9	Muscular Pain 4.1; Mouth Pain 2.9; Joint Care 0.0; Dysmenorrhea 0.0
Urinary & Reproductive	2%	1.8	Urinary Condition 1.0; Gynaecological 0.6; Urology 0.1; Male Condition

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

France Medical Devices Performance by top CHC 2 Segments

Products for circulatory, ear, and mouth care make up a very small portion of the total volume

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	1%	0.9	Not available
Circulatory	1%	0.9	Antihemorrhoids 0.8; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	1.2	Other Mouth Treatment 1.0; Mouth Infection 0.2; Fluoride Products 0.0
Weight loss	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0

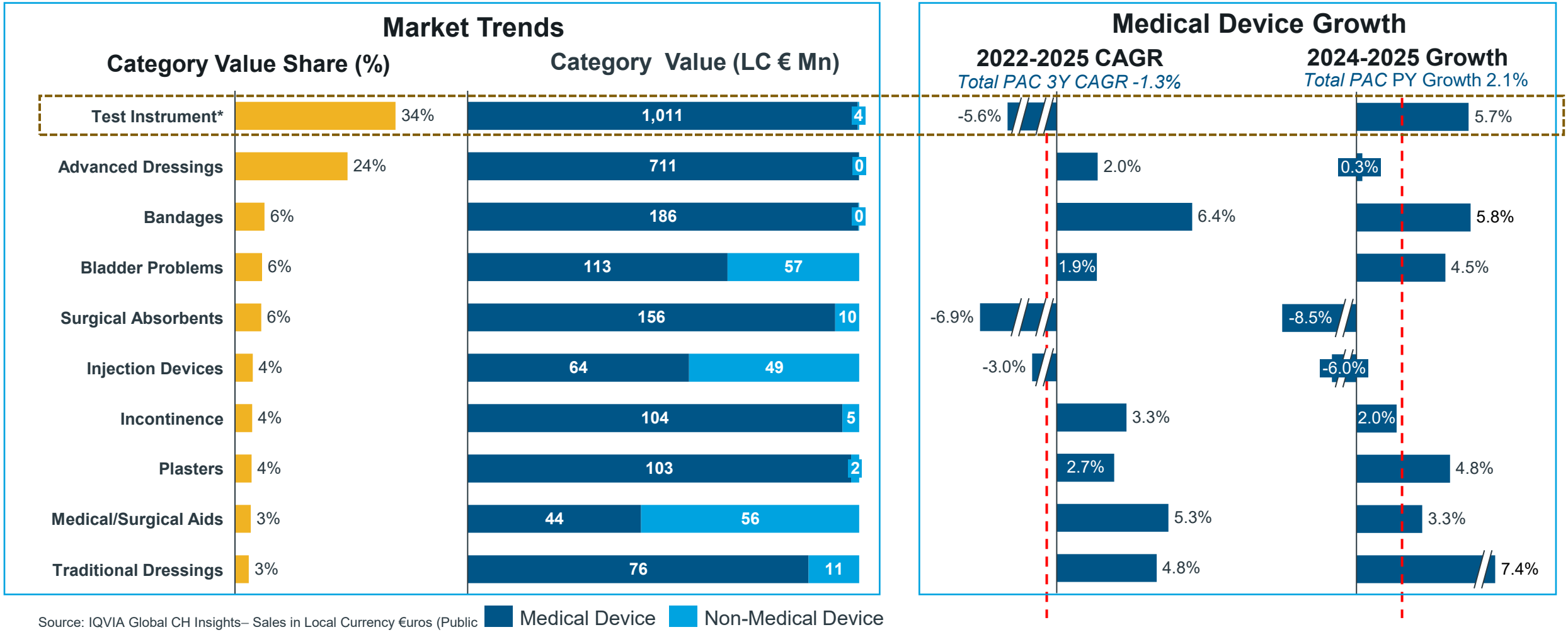
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

France PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments leads medical devices values with ~**€1 Bn** in sales and a 34% value share*

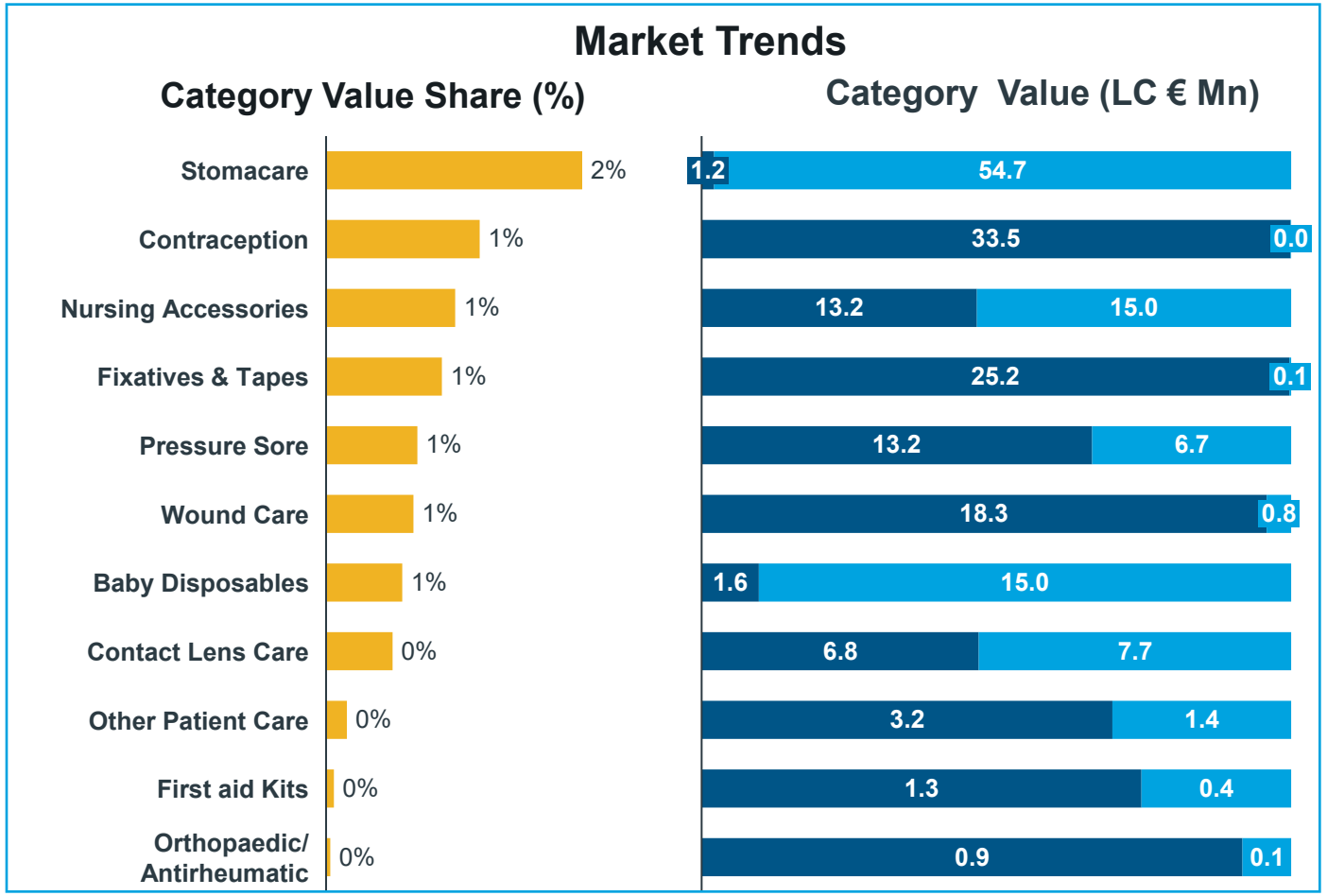


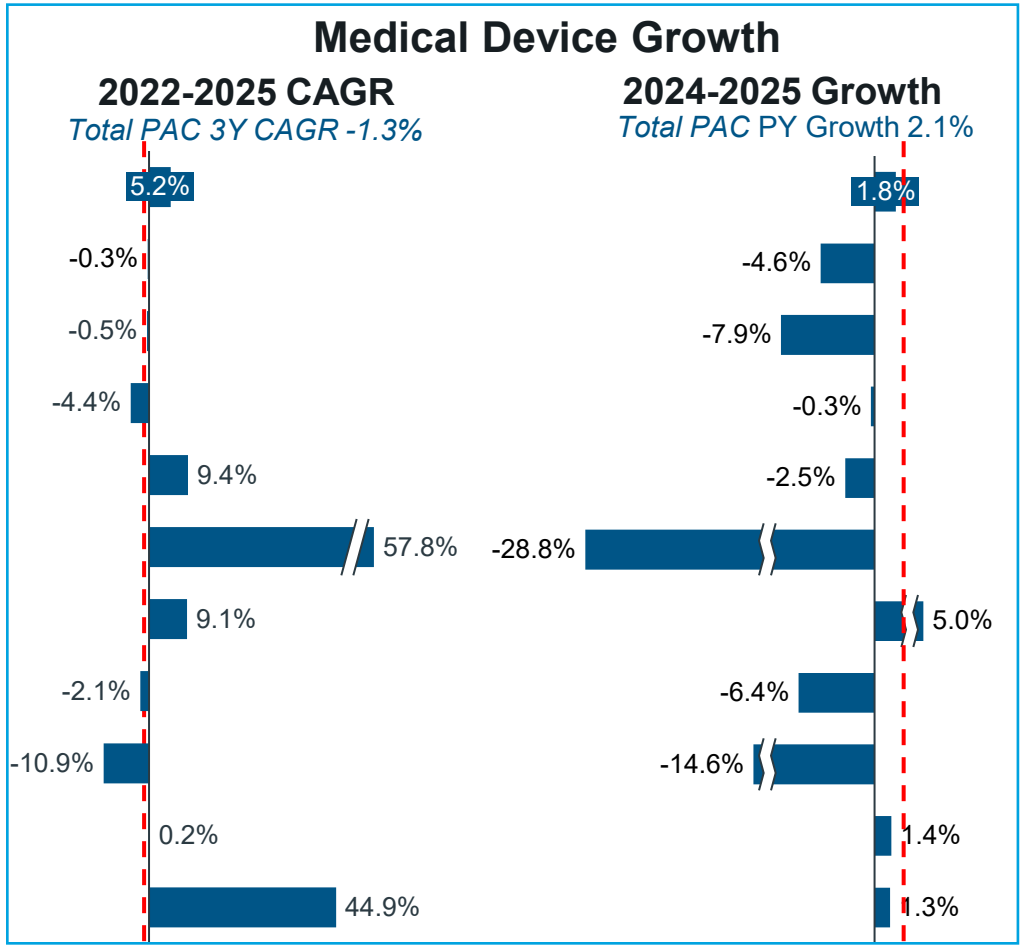
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

France PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like wound care and orthopaedic/ Antirheumatic show a positive L-T growth trend



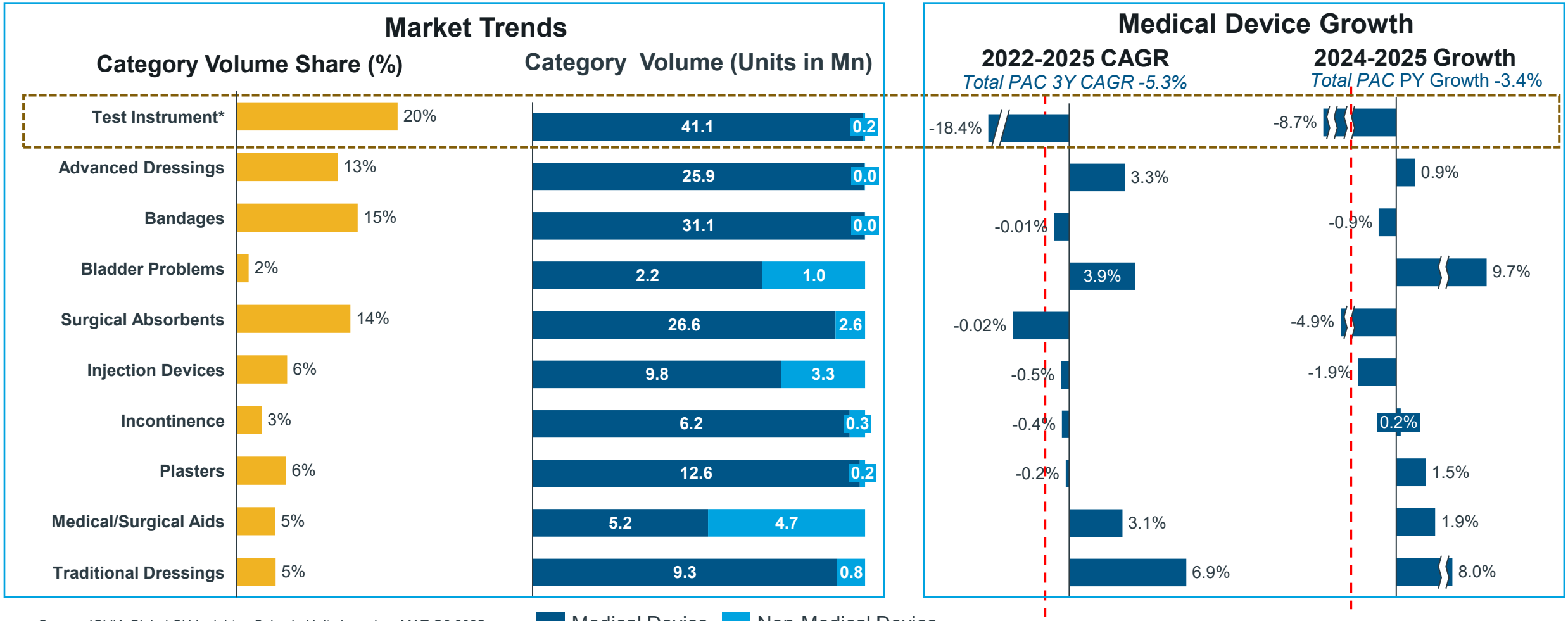


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

France PAC Performance by CHC 1 Category (1/2)

Test instrument accounts for highest volume share in medical devices

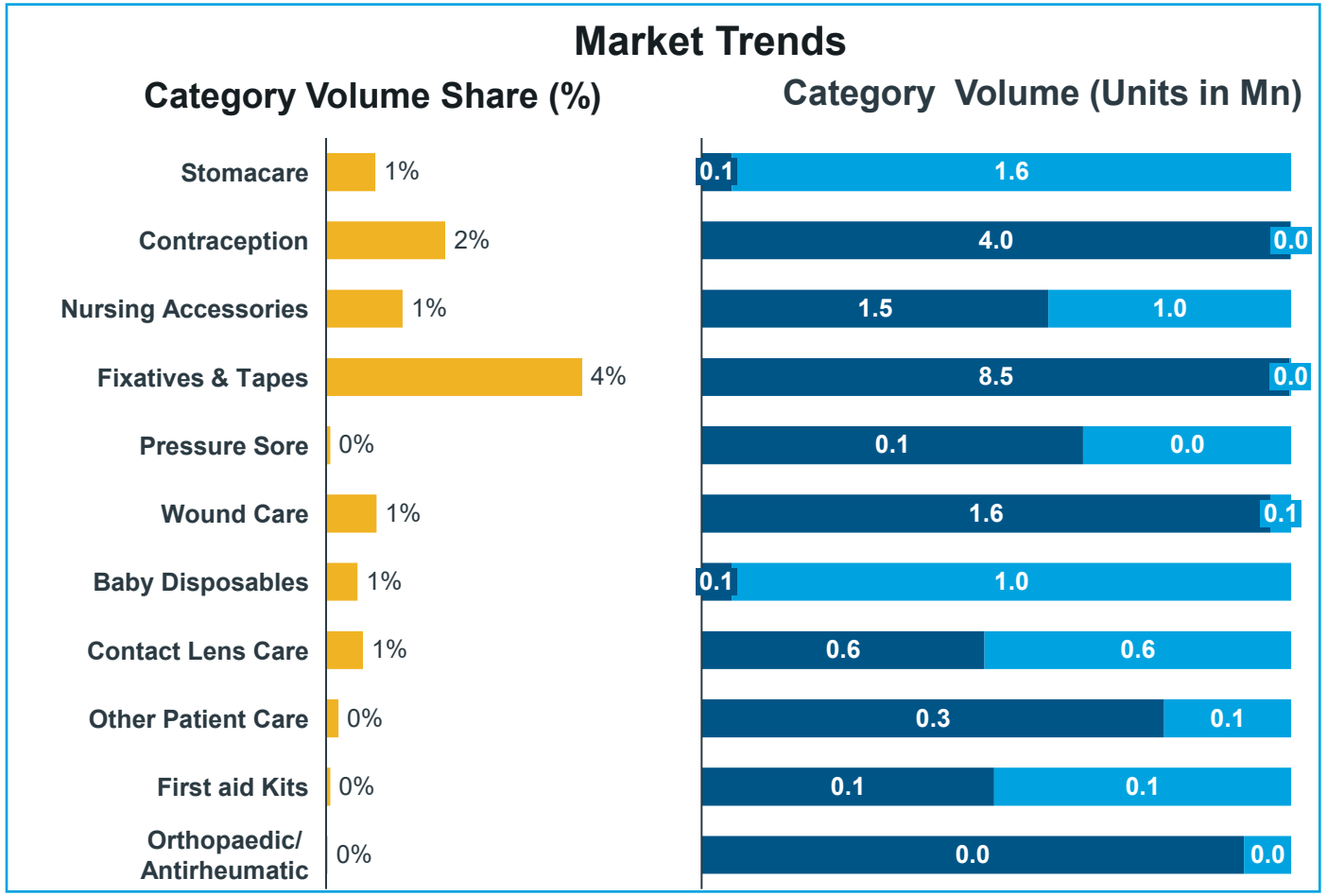


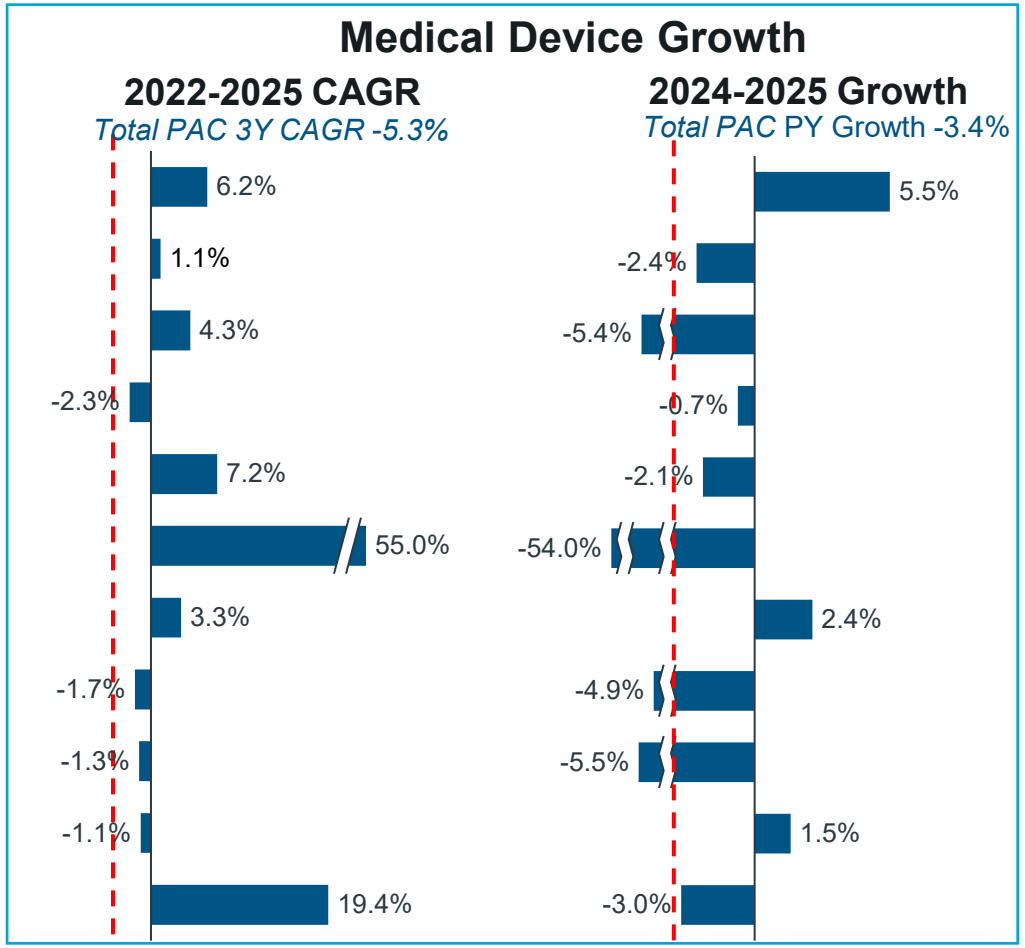
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

France PAC Performance by CHC 1 Category (2/2)

Wound care and orthopedic/antirheumatic products grow L-T even as the overall market declines





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

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France Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~85% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**2686.5**	
Test Instrument	38%	1011.2	Gluc Measuring 844.4; Lancets+Sampling 34.9; Pregnancy Test 31.0; Blood Press Monitors 31.0
Advanced Dressings	26%	710.7	Base Tech 684.0; Anti-Infection 24.5; Hyaluron 2.2; Collagen 0.0
Bandages	7%	186.1	Compression 153.5; Retention/Fixativ 31.5; Orthopaedic Casting 0.7; Other Bandages 0.3
Surgical Absorbents	6%	155.8	Swabs & Pads 103.5; Packs & Patches 33.5; Cotton wool 18.8
Bladder Problems	4%	113.3	Urethral Catheters 110.4; Drainage Bags & Cover 1.7; Other Bladder Problems 1.2; Urinary Sheaths & Access. 0.1
Incontinence	4%	103.7	Mod Heav Sev Incont. 80.9; Light Incontinence 17.8; Bed Sheets/Pads 4.9; Other Incontinence Prds 0.1

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

France Medical Devices Performance by top CHC 2 Segments

Test Instrument lead in volume share with 22% of total medical device sales

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**186.8**	
Test Instrument	22%	41.1	Gluc Measuring 22.2; Coronavirus Test 6.4; Pregnancy Test 5.5; Lancets+Sampling 2.8
Advanced Dressings	14%	25.9	Base Tech 25.1; Anti-Infection 0.1; Hyaluron 0.8; Collagen 0.0
Bandages	17%	31.1	Retention/Fixativ 20.5; Compression 10.6; Orthopaedic Casting 0.0; Other Bandages 0.0
Surgical Absorbents	14%	26.6	Swabs & Pads 20.1; Cotton wool 4.2; Packs & Patches 2.3
Bladder Problems	1%	2.2	Urethral Catheters 1.6; Drainage Bags & Cover 0.5; Other Bladder Problems 0.1; Urinary Sheaths & Access. 0.0
Incontinence	3%	6.2	Mod Heav Sev Incont. 3.8; Light Incontinence 2.2; Bed Sheets/Pads 0.3; Other Incontinence Prds 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

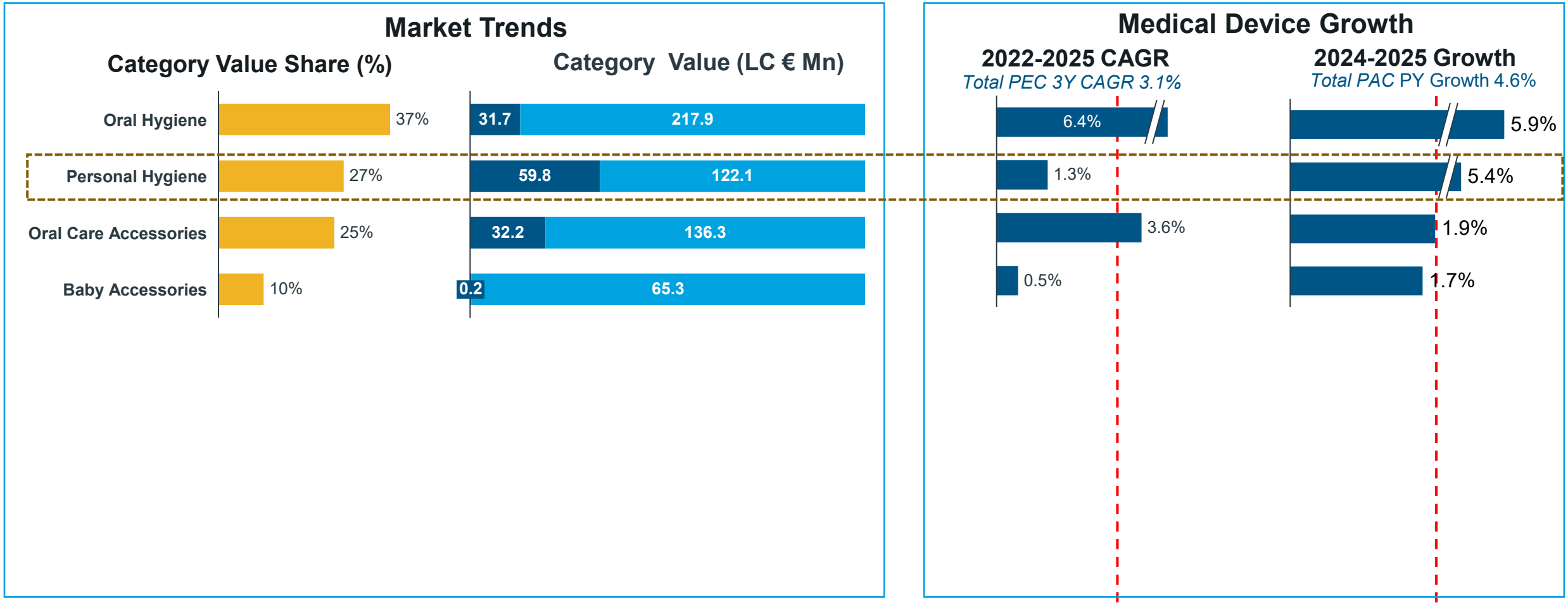
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

France PEC Performance by CHC 1 Category

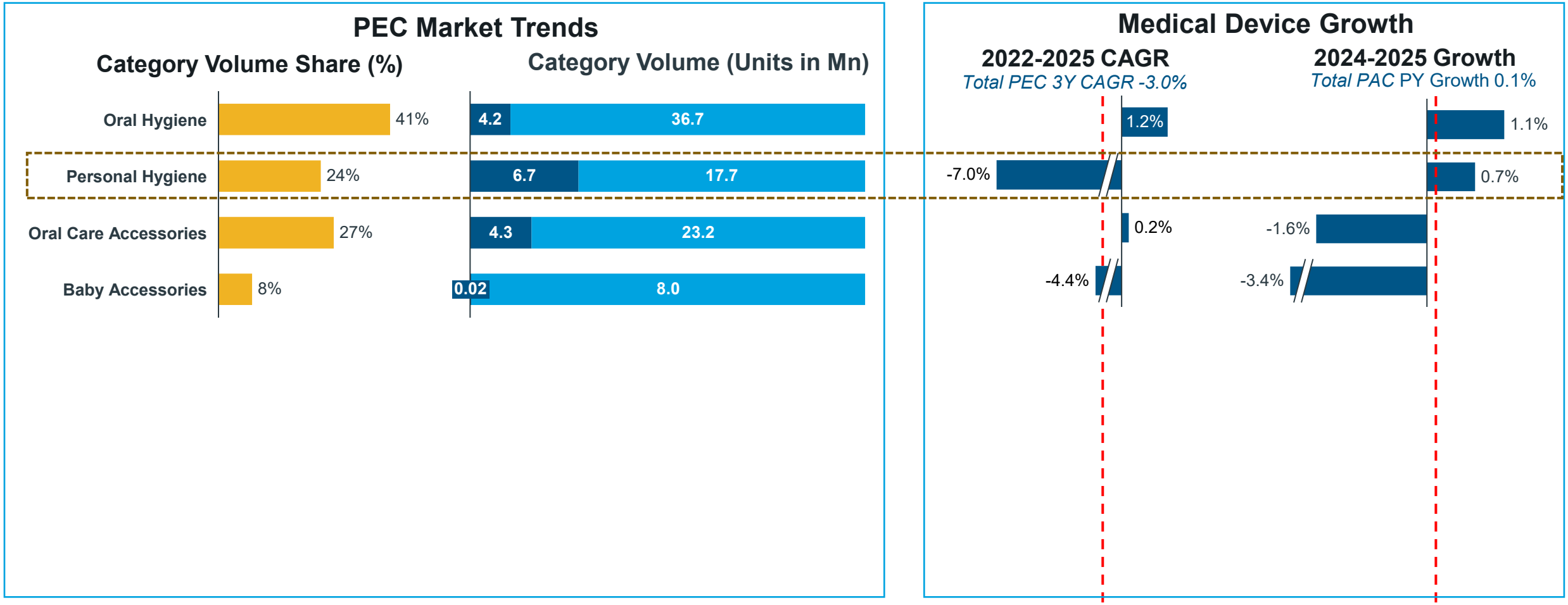
*Personal hygiene leads in sales at **€59.8 Mn** within the medical devices category*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

France PEC Performance by CHC 1 Category

Personal hygiene leads in medical device volumes as well with an overall positive growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

France Medical Devices Performance by top CHC 2 Segments

Personal hygiene holds the largest value share led by the intimate hygiene segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**123.9**	
Personal Hygiene	48%	59.8	Intimate Hygiene 55.7; Hand Hygeine w/o Soap 3.9; Foot Hygiene 0.2
Oral Care Accessories	26%	32.2	Denture Products 30.9; Toothbrushes 1.0; Dental Floss 0.2; Dental Sticks 0.1
Oral Hygiene	26%	31.7	Toothpastes 31.6; Other Oral Care 0.1; Mouthwashes 0.1
Baby Accessories	0%	0.2	Feeding Bottles &Acces. 0.2; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

France Medical Devices Performance by top CHC 2 Segments

Intimate hygiene in the personal hygiene segment leads in volume as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**15.2**	
Personal Hygiene	44%	6.7	Intimate Hygiene 5.2; Hand Hygeine w/o Soap 1.4; Foot Hygiene 0.1
Oral Care Accessories	28%	4.3	Denture Products 4.0; Toothbrushes 0.2; Dental Floss 0.0; Dental Sticks 0.0
Oral Hygiene	28%	4.2	Toothpastes 4.2; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Italy Medical Devices – Market Dynamics

Italy Medical Devices Performance Overview

Medical devices has remained stagnant with OTC showing the highest market penetration

37%

Medical device share of total CH value in 2025

Long –term Growth

-6.1% by value

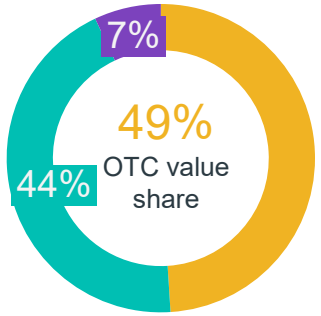
-8.0% by volume

Short –term Growth

-0.6% by value

-4.6% by volume

Medical Devices – €3.3 Bn (2025)



Long-term Growth (Value)

7% OTC

-16% PAC

2% PEC

Medical Devices Categories

30%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **88%** of new pack launches

Medical Devices Innovation

Eye Care

26% *Share for total OTC value in 2025*

Long-term Growth

6.6% by value

OTC (Over-the-Counter)

Test Instruments

22% Share of total PAC values in 2025; Dominated by **Gluc Measuring**

Long-term Growth

-37.1% by value

PAC (Patient care)

Oral Care Accessories

67% *Share of total PEC value share in 2022; Dominated by **Intimate hygiene***

Long term Growth

1.2% by value

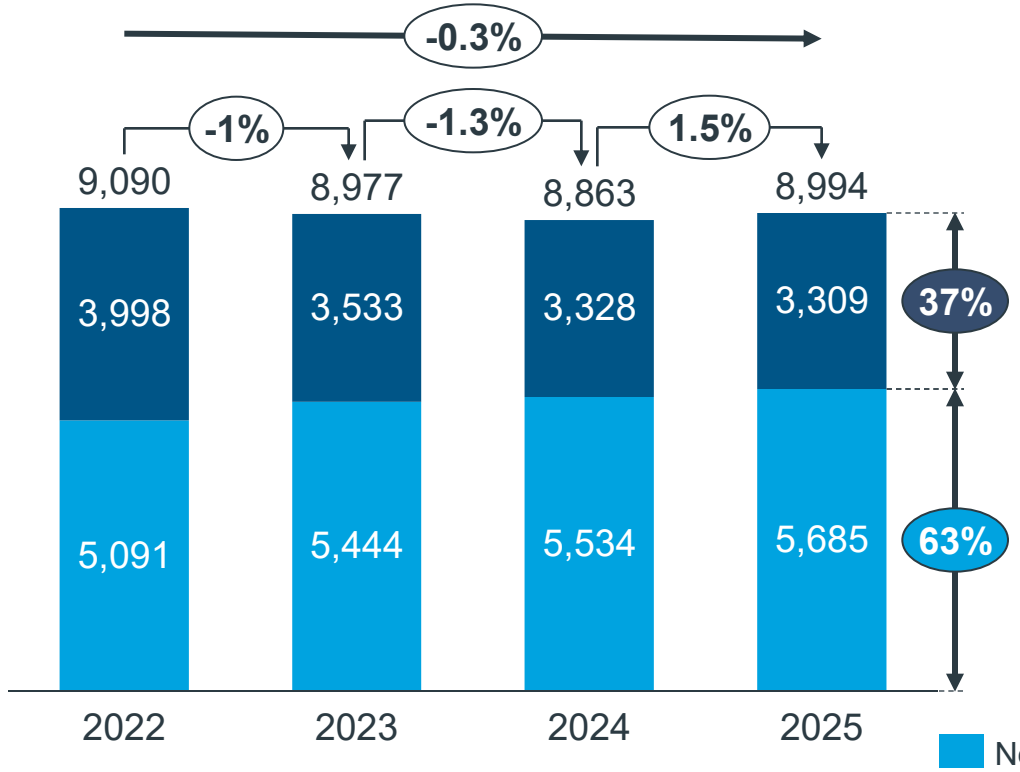
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

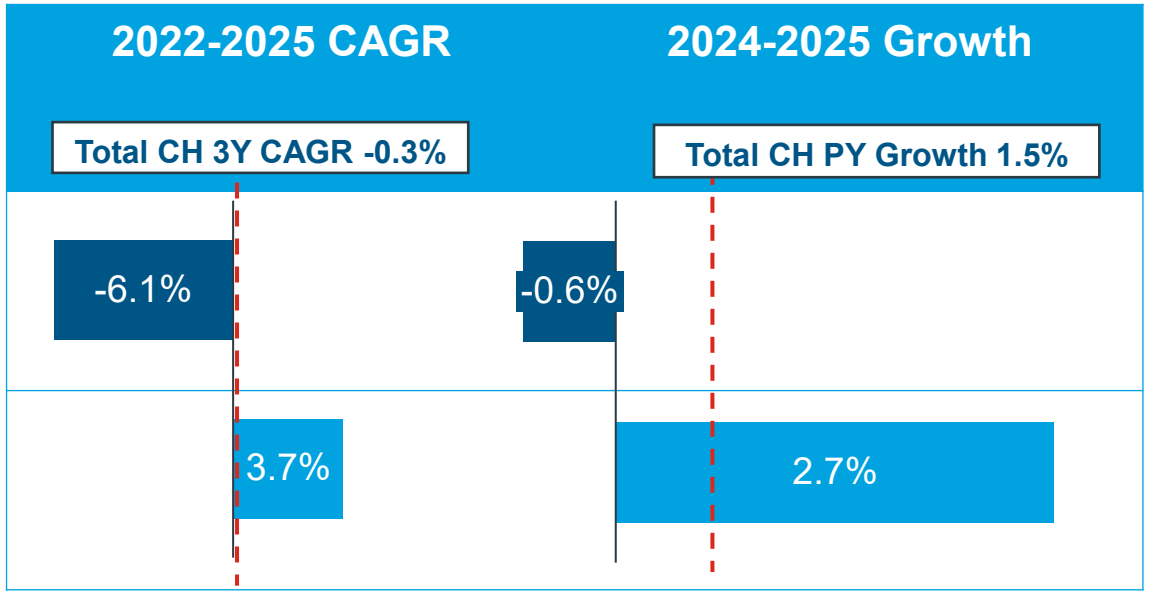
Italy CH Market Size & Growth

Despite an overall flat trend from 2022-2025, overall market saw a growth of 1.5% in 2024-2025 with medical devices accounting for 37% of the market share

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

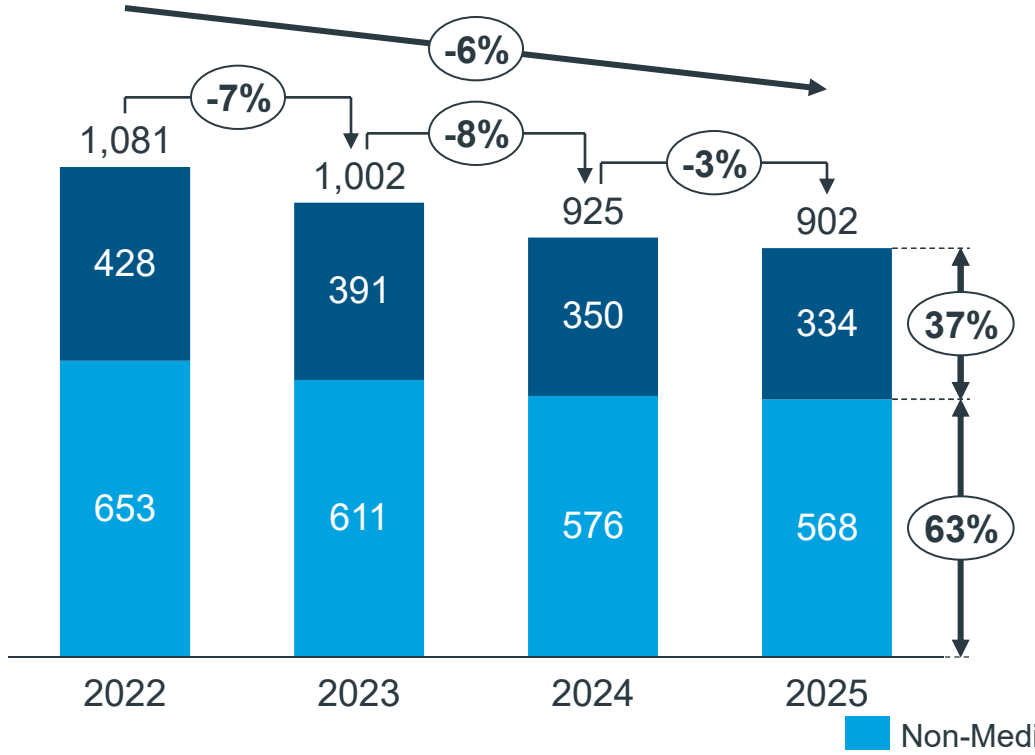


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

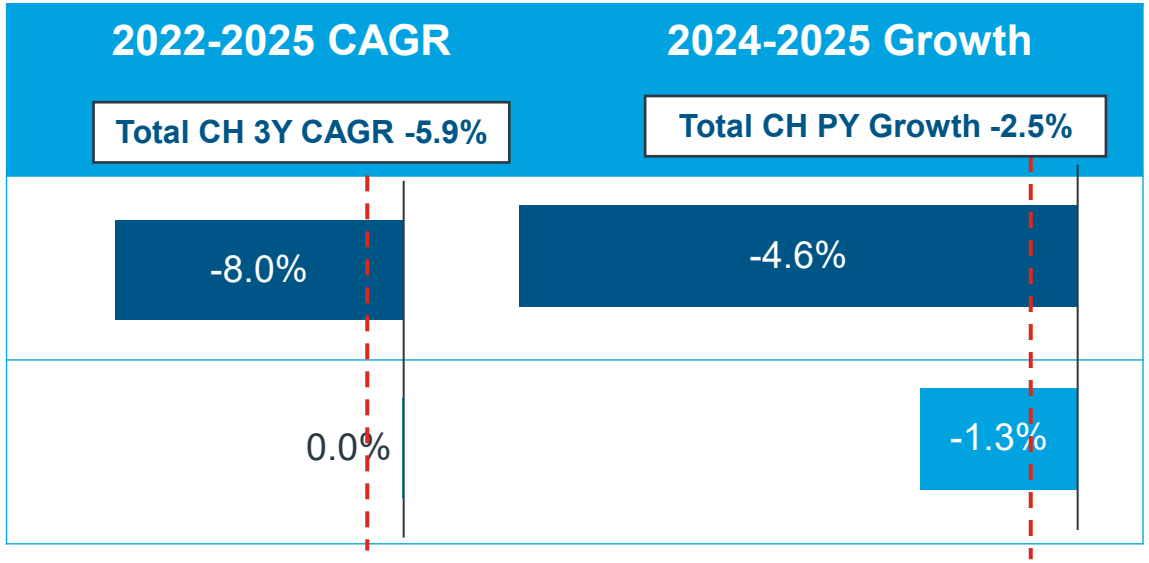
Italy CH Market Volume & Growth

Medical devices account for 37% of the CH market volume, while the overall volume is showing a declining growth trend

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Italy CH Performance by Classes

*OTC leads with **€1.6 bn** in medical device sales and positive growth, while patient care contributes the highest share of medical device value at 85%*

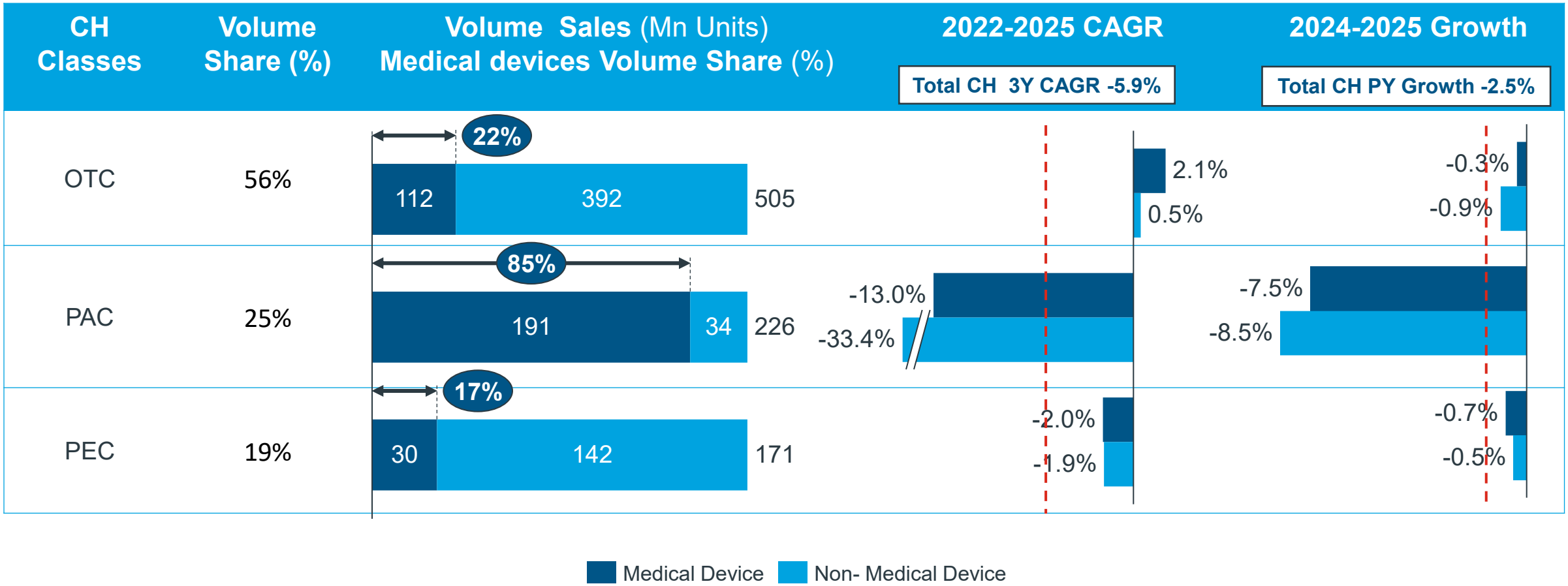
CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR (Total CH 3Y CAGR -0.3%)	2024-2025 Growth (Total CH PY Growth 1.5%)
OTC	71%	25%; 1,605 / 4,790 / 6,395	7.0% / 5.5%	3.4% / 3.2%
PAC	19%	85%; 1,457 / 252 / 1,709	-16.0% / -15.1%	-5.1% / -3.4%
PEC	10%	28%; 247 / 643 / 890	2.0% / 2.3%	2.7% / 2.0%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Italy CH Performance by Classes

Patient Care leads in medical device volume sales with 191mn units and holds the highest medical device volume share (85%), while OTC records strong growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Italy Medical Devices Packs & New Launches

Most new medical device launches over the past three years have come from the Patient Care

Category	Total Packs*	New Launches**
CH Total	22,459 / 41,365 / **63,824**	4,613 / 10,721 / **15,334**
OTC	1,856 / 15,204 / **17,060**	471 / 4,007 / **4,478**
Patient Care	20,217 / 17,456 / **37,673**	4,057 / 4,811 / **8,868**
Personal Care	386 / 8,705 / **9,091**	85 / 1,903 / **1,988**

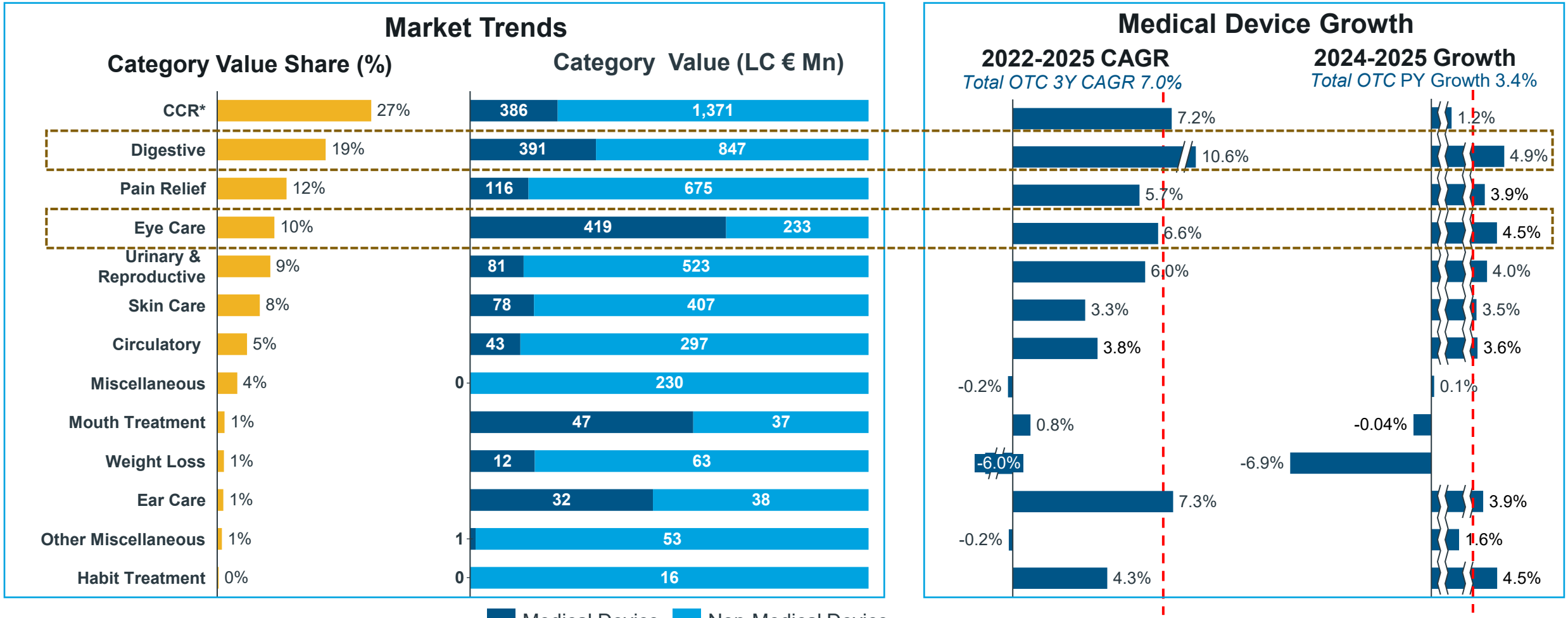
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Italy OTC Performance by CHC 1 Category in 2025

*Eye care leads the medical devices values with **€0.4 Bn** sales; while digestive outperforms in L-T*

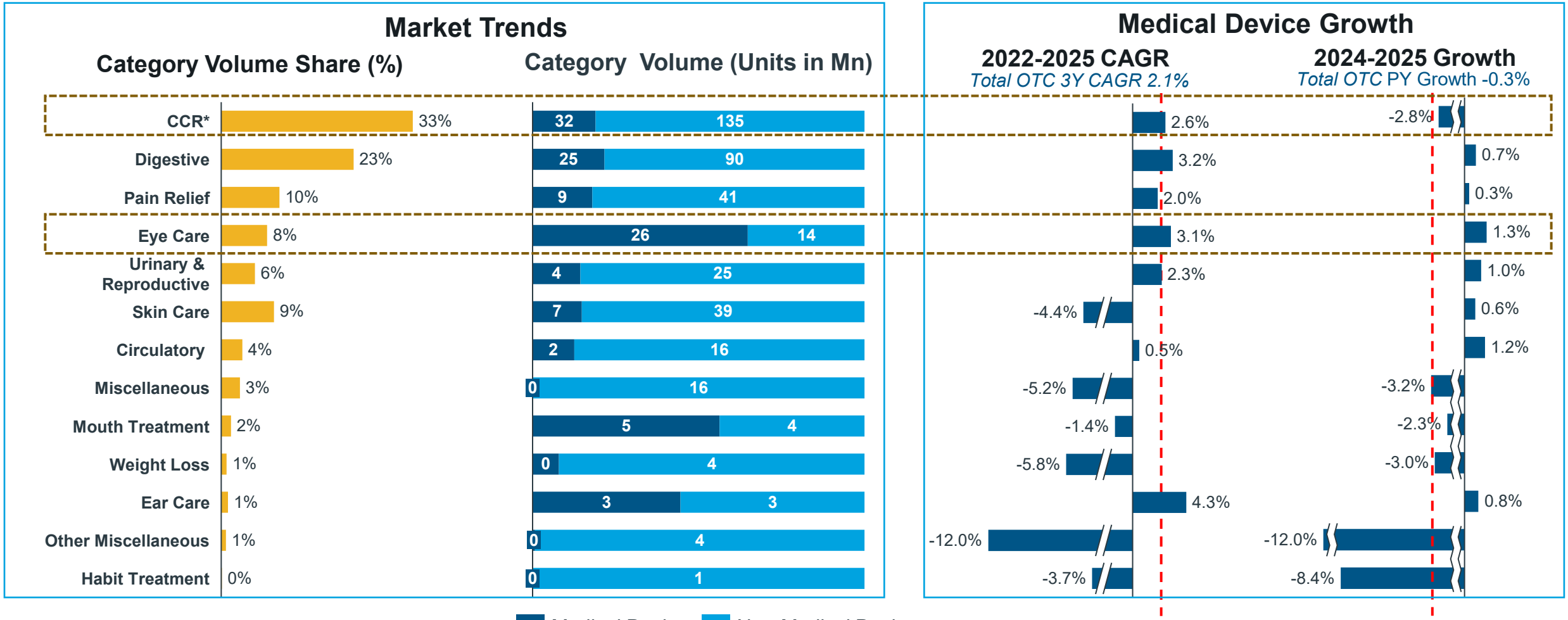


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Italy OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share, while eye care outperforms in S-T and L-T



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Italy Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Acid & heartburn in digestive product segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**1605.0**	
Eye Care	26%	418.7	Not available
Digestive	24%	390.5	Acid & Heartburn 193.4; Laxatives 131.7; Digestive 46.6; Antidiarrhoeals 18.8
CCR	24%	386.2	Nasal Saline 154.4; Cough 106.1; Sore Throat 49.5; Other Respiratory 41.9
Pain Relief	7%	115.8	Muscular Pain 63.1; Mouth Pain 51.4; Other Pain Relief 0.9; Dysmenorrhea 0.4
Urinary & Reproductive	5%	81.3	Gynaecological 63.8; Urinary Condition 10.1; Urology Male Condition 7.5
Skin Care	5%	77.7	Wound Healing 28.3; Wart/Corn Removal 9.1; Skin Irritation 8.5; Antifungals 8.3

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Italy Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	3%	46.7	Mouth Infection 37.4; Other Mouth Treatment 8.4; Fluoride Products 0.9
Circulatory	3%	42.8	Antihemorrhoids 30.9; Chloesterol Regulating 11.9; Other Circulatory 0.0
Ear Care	2%	32.1	Not available
Weight Loss	1%	12.3	Not available
Other Miscellaneous	0%	0.7	Not available
Miscellaneous	0%	0.2	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Italy Medical Devices Performance by top CHC 2 Segments

Acid & Heartburn leads in digestive, alongside Nasal saline in CCR, in terms of volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**112.5**	
Eye Care	23%	25.8	Not available
Digestive	22%	24.9	Acid & Heartburn 10.9; Laxatives 10.9; Digestive 2.0; Antidiarrhoeals 1.1
CCR	28%	31.6	Nasal Saline 15.0; Cough 7.5; Sore Throat 4.0; Cold Remedies 2.6
Pain Relief	8%	9.1	Muscular Pain 4.9; Mouth Pain 4.1; Dysmenorrhea 0.0; Other Pain Relief 0.1
Urinary & Reproductive	4%	4.2	Gynaecological 3.4; Urinary Condition 0.5; Urology 0.4; Male Condition
Skin Care	6%	6.8	Hand Skin Wound Disinfect 2.4; Wound Healing 2.0; Wart/Corn Removal 0.7; Skin Irritation 0.5

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Italy Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	4%	4.8	Mouth Infection 4.1; Other Mouth Treatment 0.6; Fluoride Products 0.1
Circulatory	2%	2.3	Antihemorrhoids 1.9; Chloesterol Regulating 0.4; Other Circulatory 0.0
Ear Care	2%	2.6	Not available
Weight Loss	0%	0.4	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

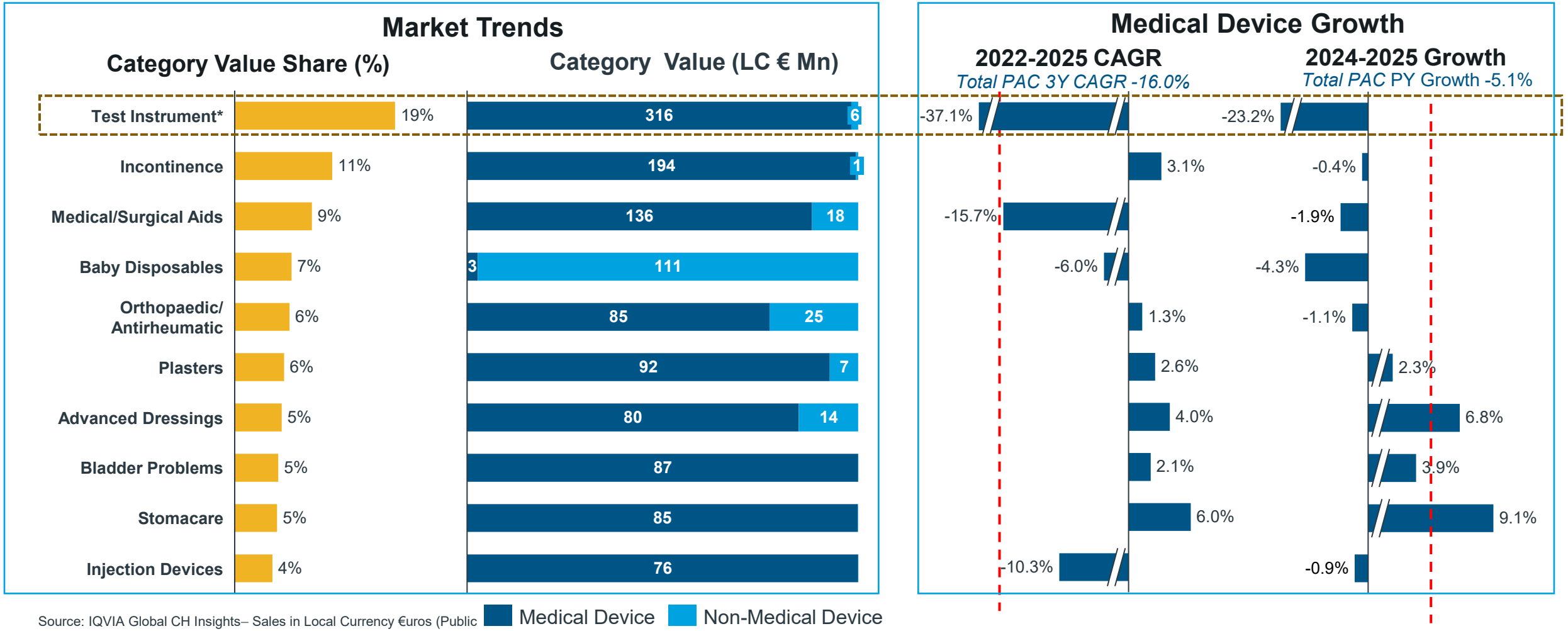
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Italy PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments leads medical devices values with **€0.3 Bn** sales*

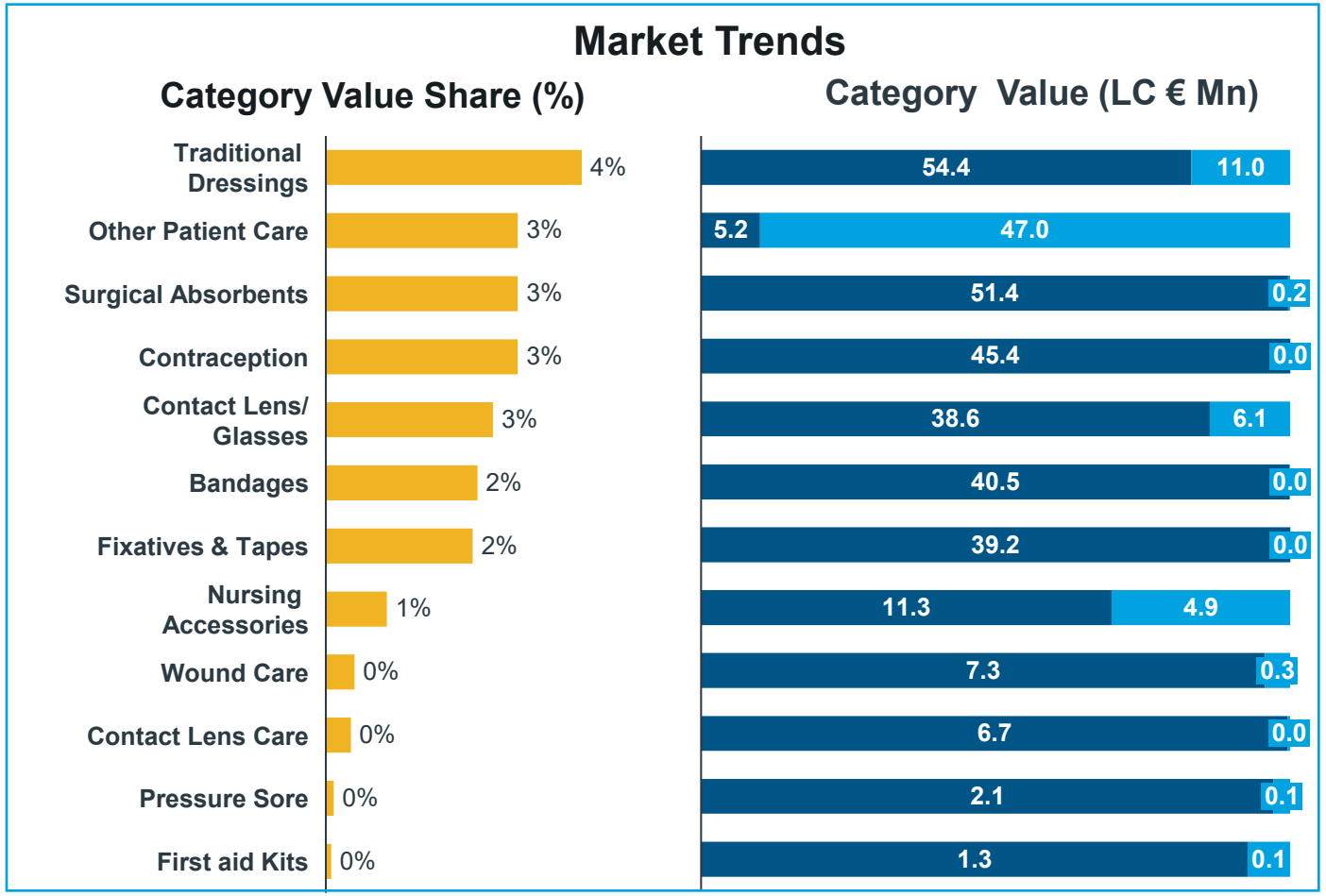


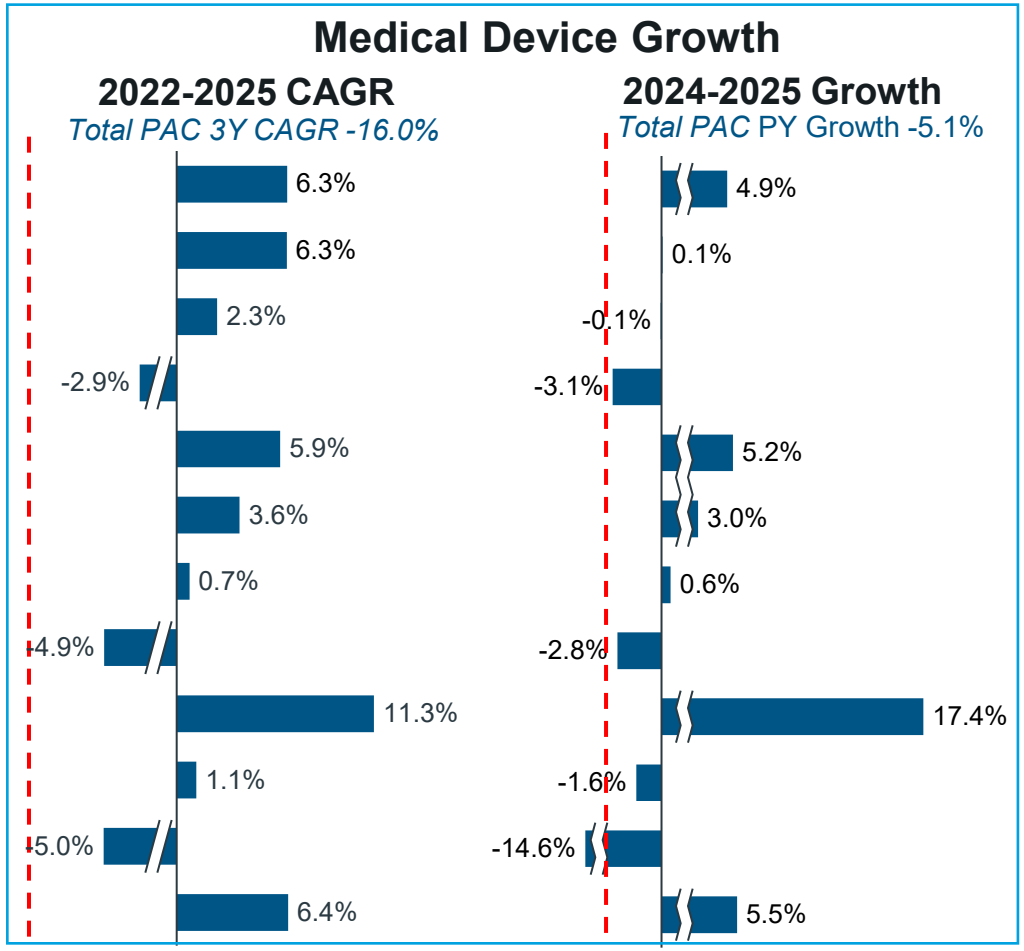
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Italy PAC Performance by CHC 1 Category in 2025 (2/2)

Some smaller categories show positive growth in S-T and L-T despite overall decline in the market



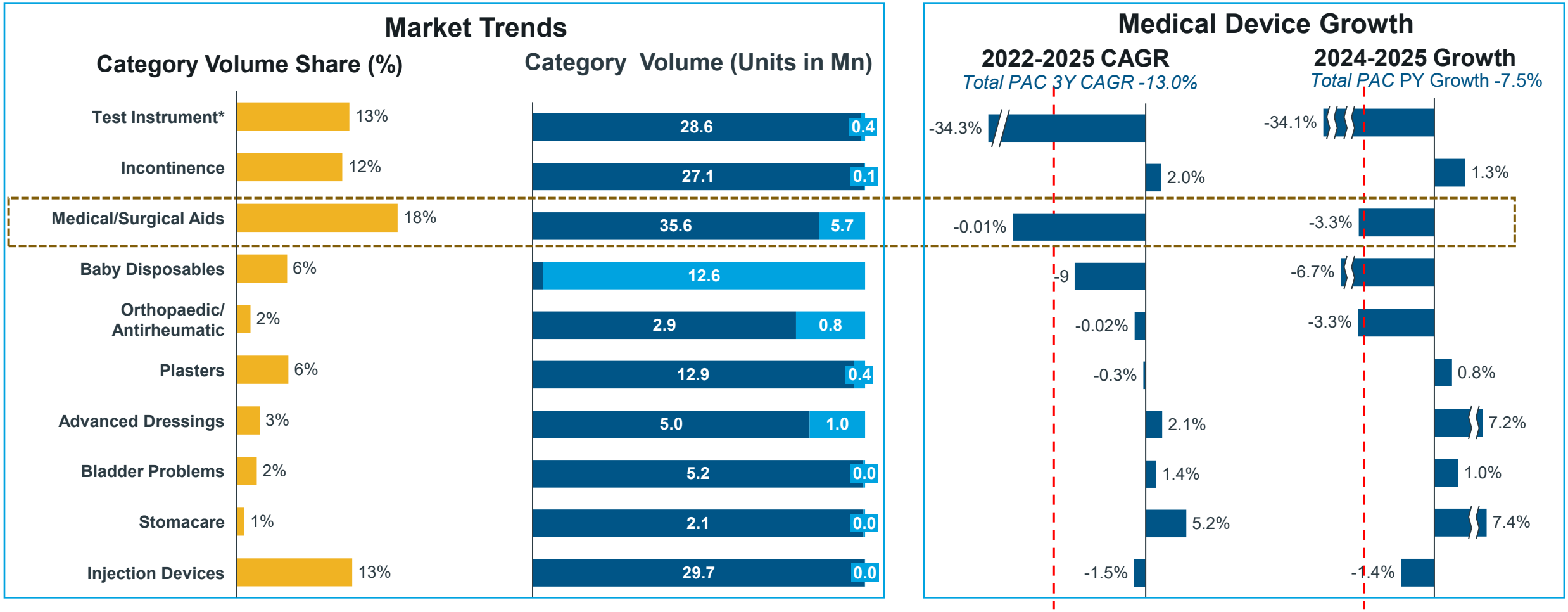


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Italy PAC Performance by CHC 1 Category (1/2)

Medical/ Surgical Aids hold the highest volume share

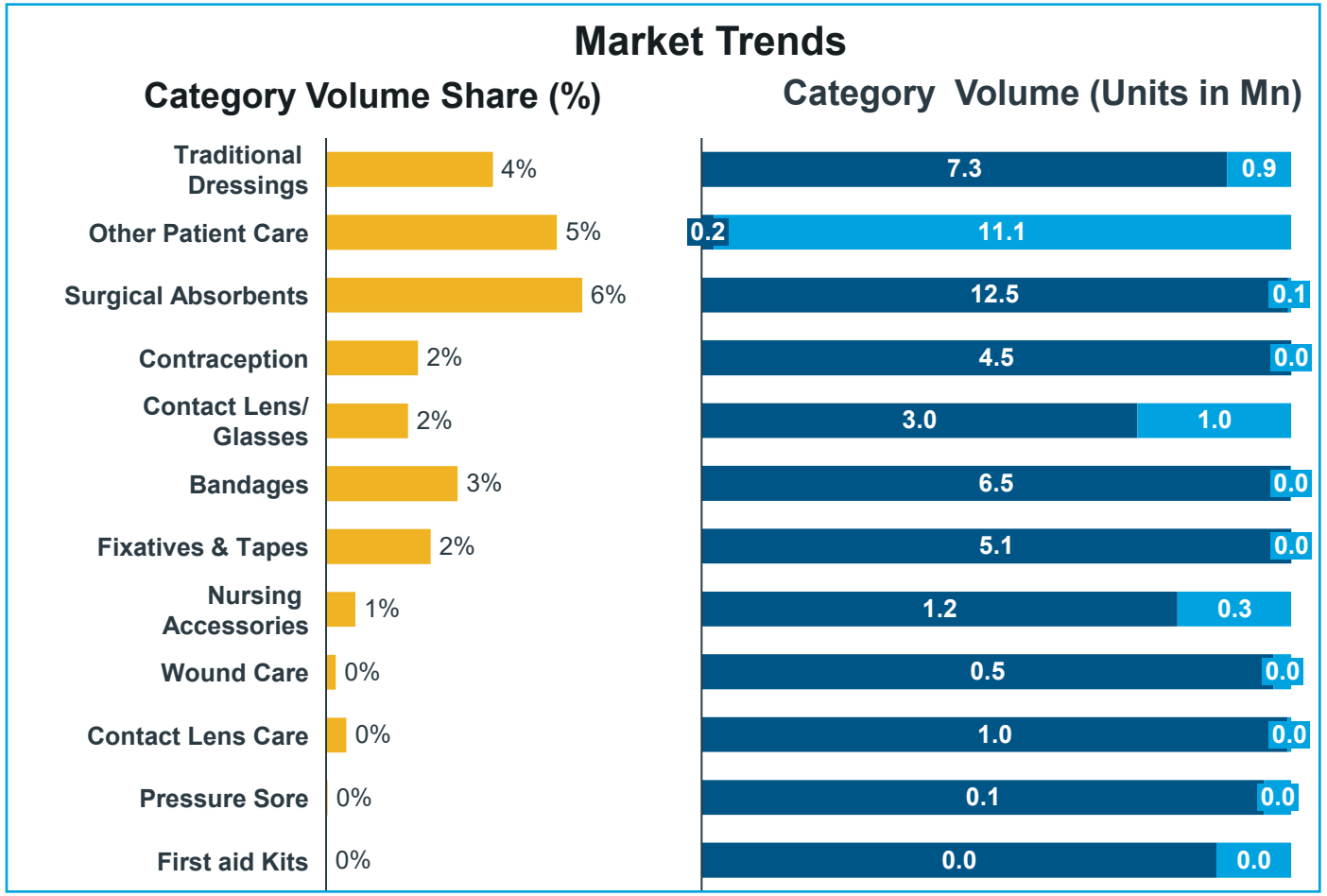


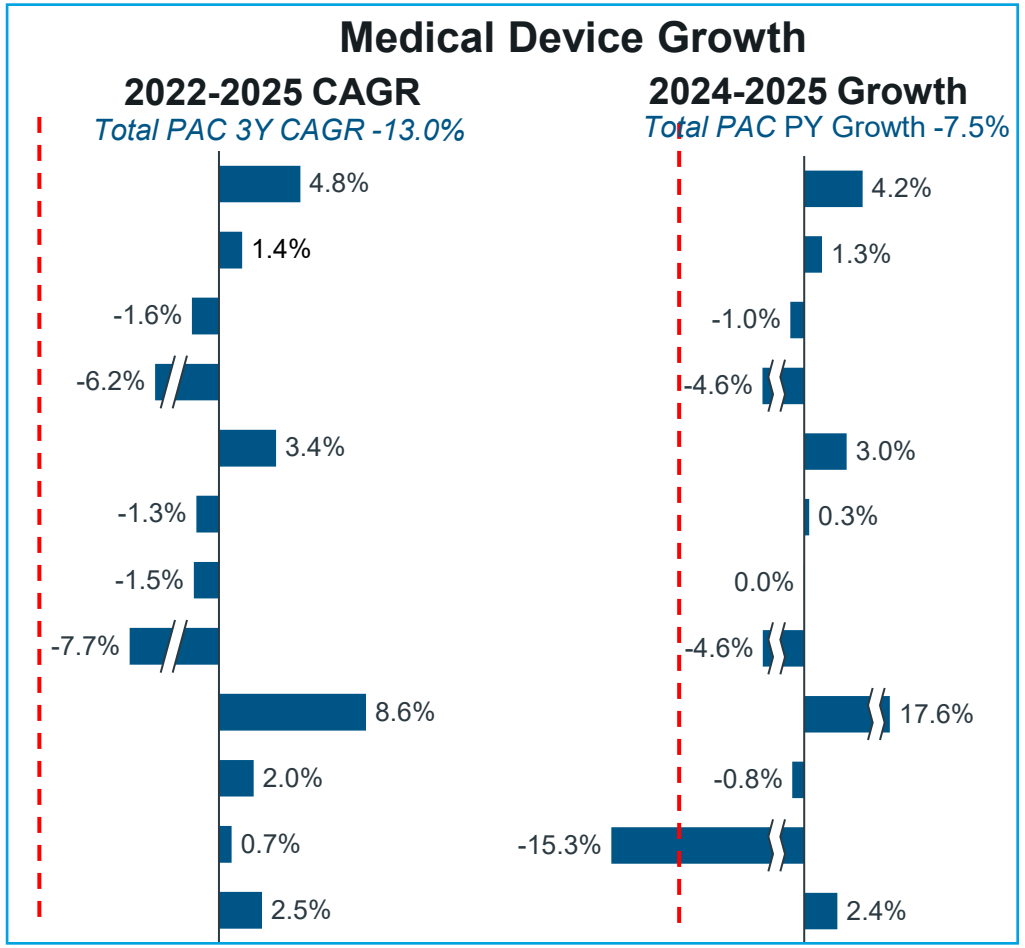
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Italy PAC Performance by CHC 1 Category (2/2)

Small categories like traditional dressings and other PAC products show a positive growth trend





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Italy Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 60% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025			
PAC- Medical Devices		**1456.8**				
Test Instrument	22%	315.8	Gluc Measuring	Blood Press Monitors	Coronavirus Test	Pregnancy Test
			109.3	44.4	40.4	38.2
Incontinence	13%	194.3	Mod Heav Sev Incont.	Light Incontinence	Bed Sheets/Pads	Incontinence care
			105.4	75.3	13.4	0.1
Medical/ Surgical Aids	9%	136.4	Inhalation & Aerosol	Urine test	Miscellaneous	Hot & Cold Packs
			46.1	31.3	22.4	16.5
Plasters	6%	91.7	Special Plaster	Plaster Strip	Liquid Plaster	Plaster Spec. Uses
			48.6	35.9	5.1	2.0
Bladder Problems	6%	87.3	Urethral Catheters	Drainage Bags & Cover	Urinary Sheaths & Access.	Other Bladder Problems
			62.4	18.8	4.9	1.3
Orthopaedic/ Antirheumatic	6%	85.0	Curativ/Elastic Stocking	Belts Other Supp	Clogs+Orthopaedic Footwear	Equiment for Disabled
			33.0	24.1	9.0	6.9

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

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Italy Medical Devices Performance by top CHC 2 Segments

Urine tests lead in volumes in medical/surgical aids category

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**191.4**	
Test Instrument	15%	28.6	Coronavirus Test 8.1; Gluc Measuring 6.5; Lancets+Sampling 4.8; Thermometers 3.7
Incontinence	14%	27.1	Light Incontinence 17.1; Mod Heav Sev Incont. 8.9; Bed Sheets/Pads 1.1; Incontinence care 0.0
Medical/Surgical Aids	19%	35.6	Urine test 23.3; Miscellaneous 4.3; Hot & Cold Packs 2.3; Inhalation & Aerosol 1.8
Plasters	7%	12.9	Plaster Strip 7.8; Special Plaster 4.5; Liquid Plaster 0.4; Plaster Spec. Uses 0.2
Bladder Problems	3%	5.2	Drainage Bags & Cover 3.0; Urethral Catheters 1.6; Other Bladder Problems 0.5; Urinary Sheaths & Access. 0.1
Orthopaedic/ Antirheumatic	2%	2.9	Curativ/Elastic Stocking 1.3; Belts Other Supp 0.9; Clogs+Orthopaedic Footwear 0.3; Equiment for Disabled 0.3

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

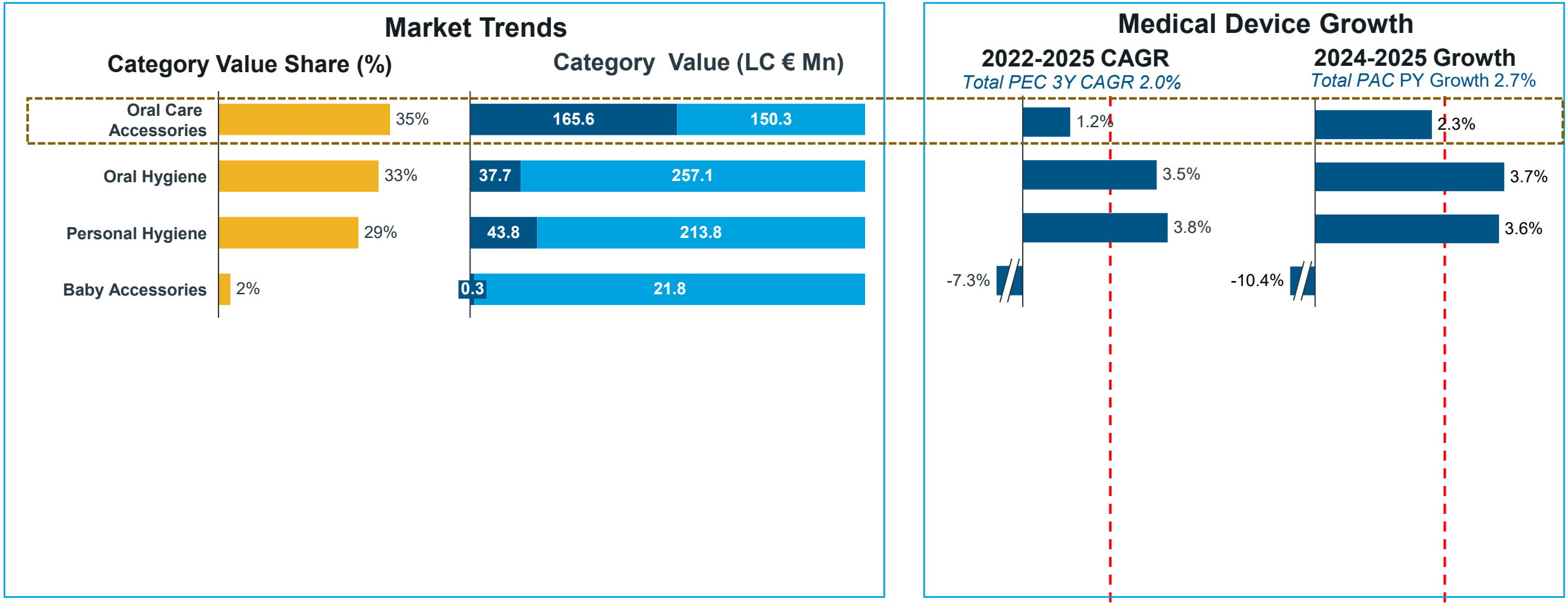
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Italy PEC Performance by CHC 1 Category

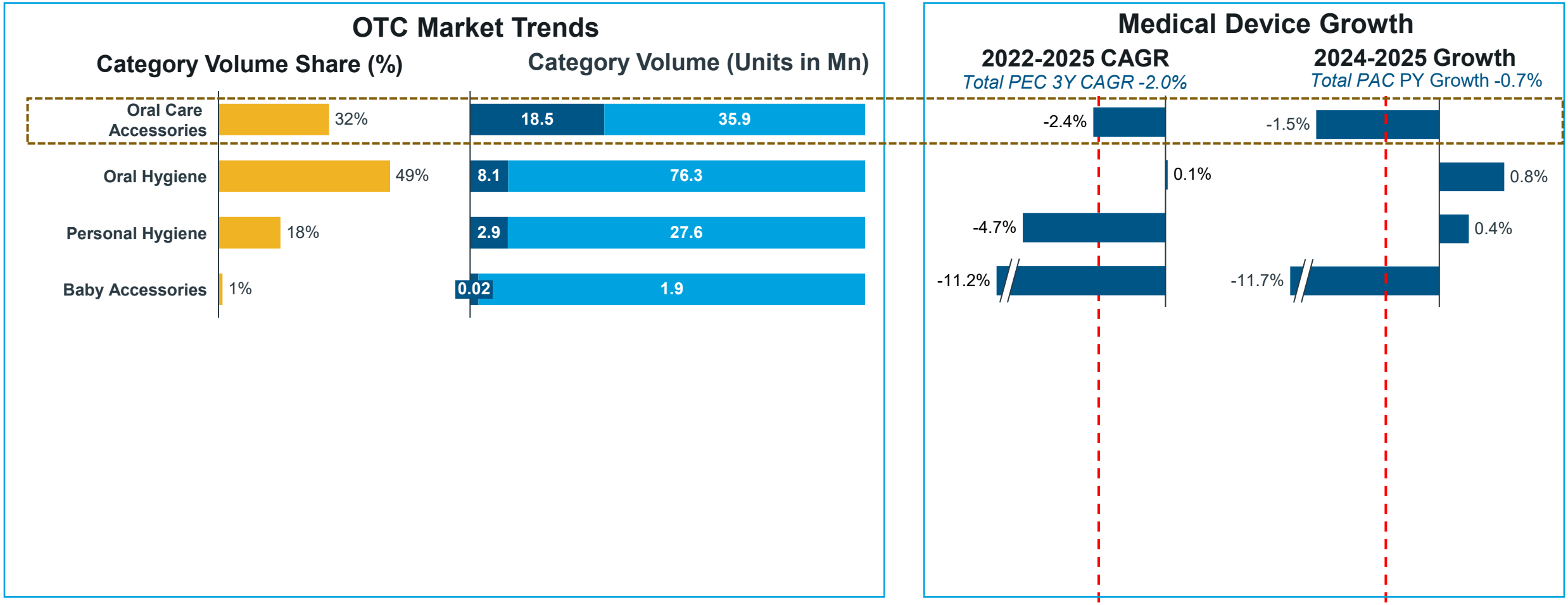
Oral care accessories leads medical devices values; showing positive growth in L-T & S-T



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Italy PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes as well with 18.5 Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Italy Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**247.4**	
Oral Care Accessories	67%	165.6	Denture Products 157.6; Other Oral Care Acces. 7.4; Toothbrushes 0.6; Interdental Brushes 0.0
Personal Hygiene	18%	43.8	Intimate Hygiene 43.8; Foot Hygiene 0.1; Hand Hygeine w/o Soap 0.0
Oral Hygiene	15%	37.7	Toothpastes 32.9; Mouthwashes 4.5; Other Oral Care 0.3
Baby Accessories	0%	0.3	Feeding Bottles &Acces. 0.2; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Italy Medical Devices Performance by top CHC 2 Segments

Denture product lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**29.6**	
Oral Care Accessories	63%	18.5	Denture Products 18.0; Other Oral Care Acces. 0; Toothbrushes 0.0; Interdental Brushes 0.2
Personal Hygiene	10%	2.9	Intimate Hygiene 2.9; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	27%	8.1	Toothpastes 7.5; Mouthwashes 0.6; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Spain Medical Devices – Market Dynamics

Spain Medical Devices Performance Overview

Medical devices account for ~40% of the overall value share, with the PAC being the dominant category

39%

Medical device share of total CH value in 2025

Long –term Growth

-10.7% by value

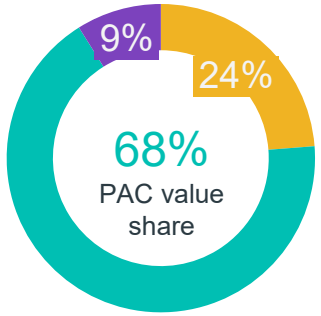
-25.2% by volume

Short –term Growth

0.0% by value

-10.4% by volume

Medical Devices – €2.1 Bn (2025)



Long-term Growth (Value)

-15.9% PAC | **7.1%** OTC | **5.1%** PEC

Medical Devices Categories

32%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **84%** of new pack launches

Medical Devices Innovation

Incontinence

46% *Share of total PAC values in 2025; Dominated by **Mod Heav Sev Incont.***

Long-term Growth

2.5% by value

PAC (Patient care)

Eye care

43% *Share for total OTC value in 2025*

Long-term Growth

8.2% by value

OTC (Over-the-Counter)

Oral care accessories

60% *Share of total PEC value share in 2025; Dominated by **Dental products***

Long term Growth

5.0% by value

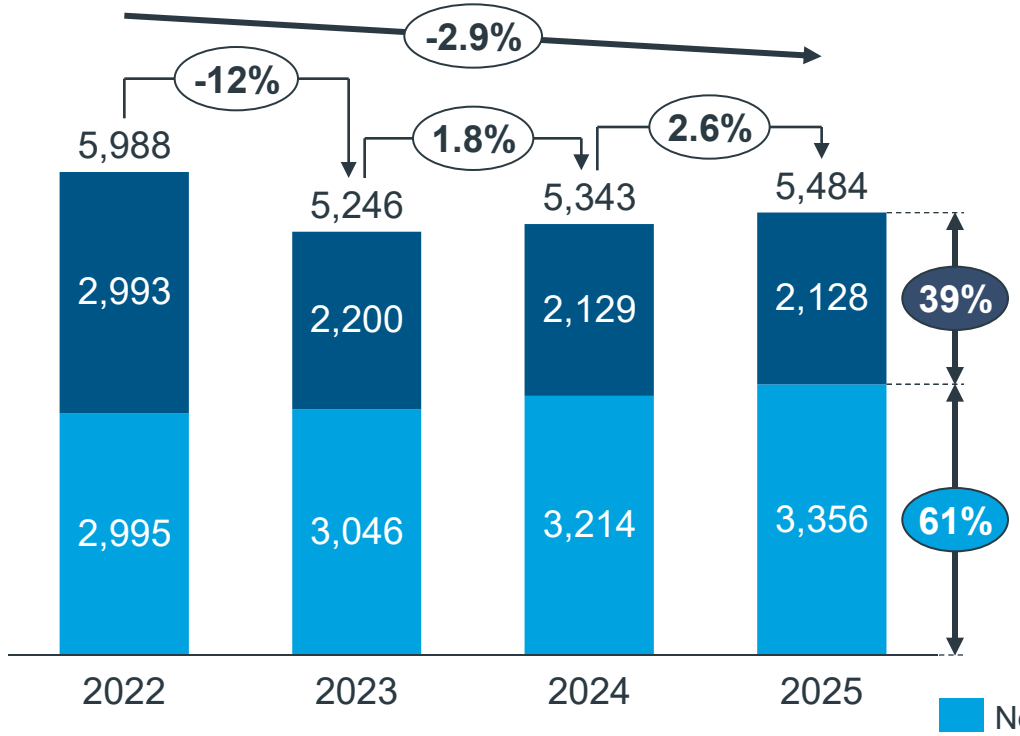
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

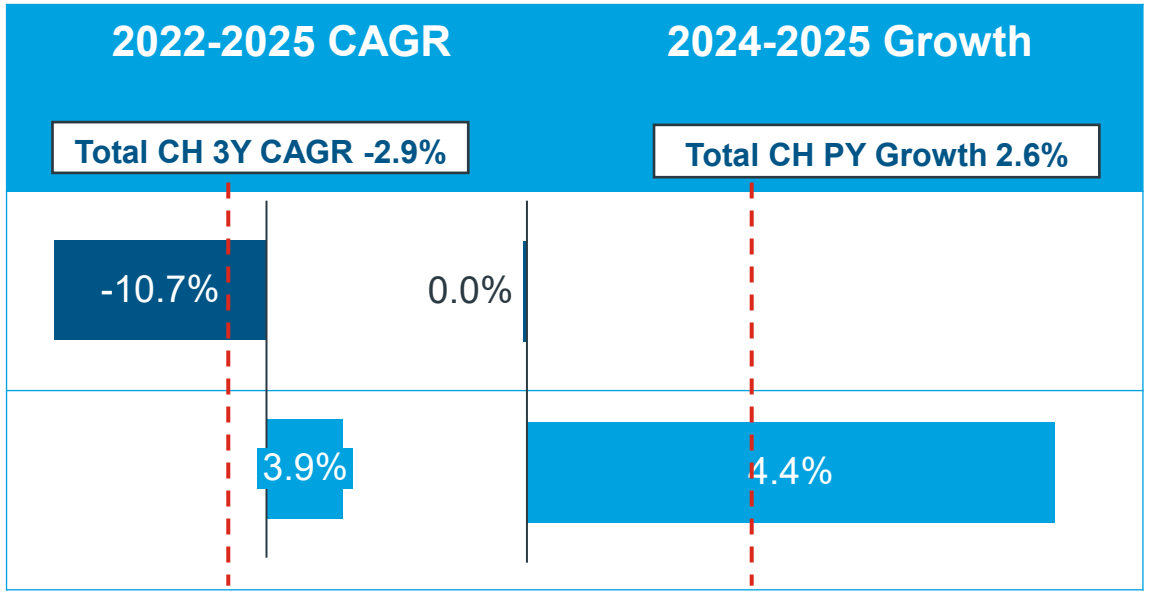
Spain CH Market Size & Growth

Overall market in Spain is experiencing a downturn, although the CH medical devices value growth has remained stable over the past year

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

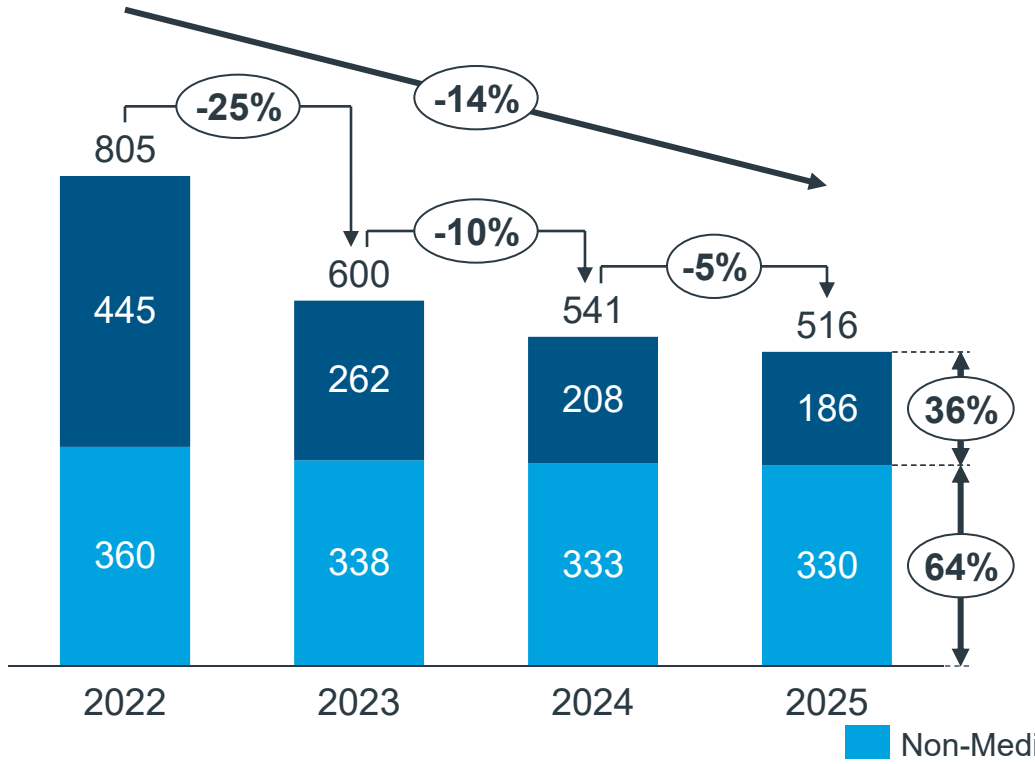


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

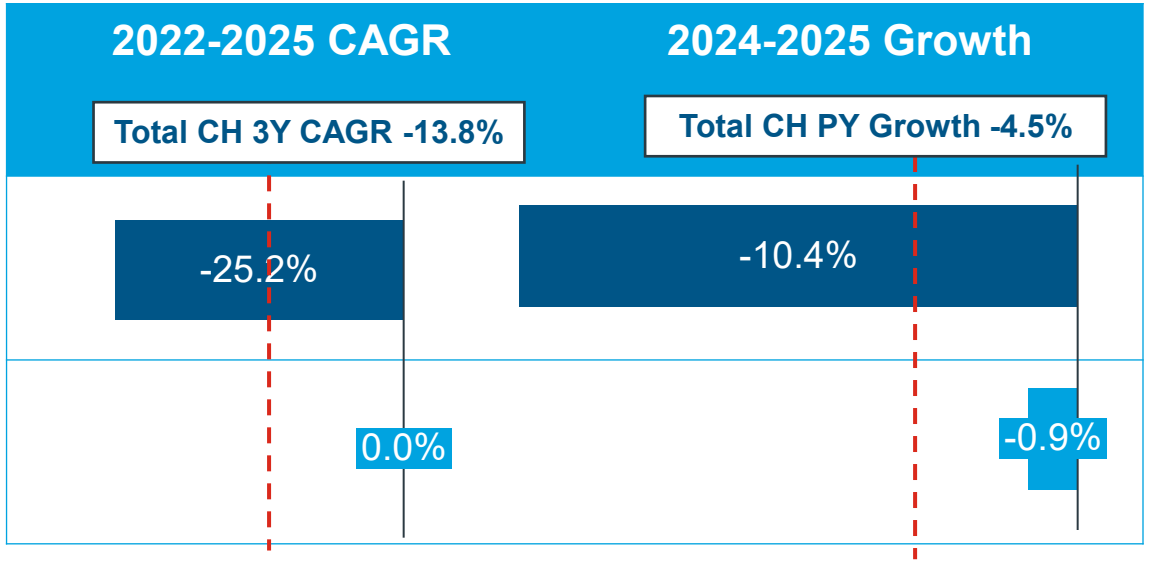
Spain CH Market Volume & Growth

The overall volume share has decreased significantly over the long term, with medical devices now representing 36% of the total CH market volume

Market Volume (Mn Units), and Latest Volume Share (%)



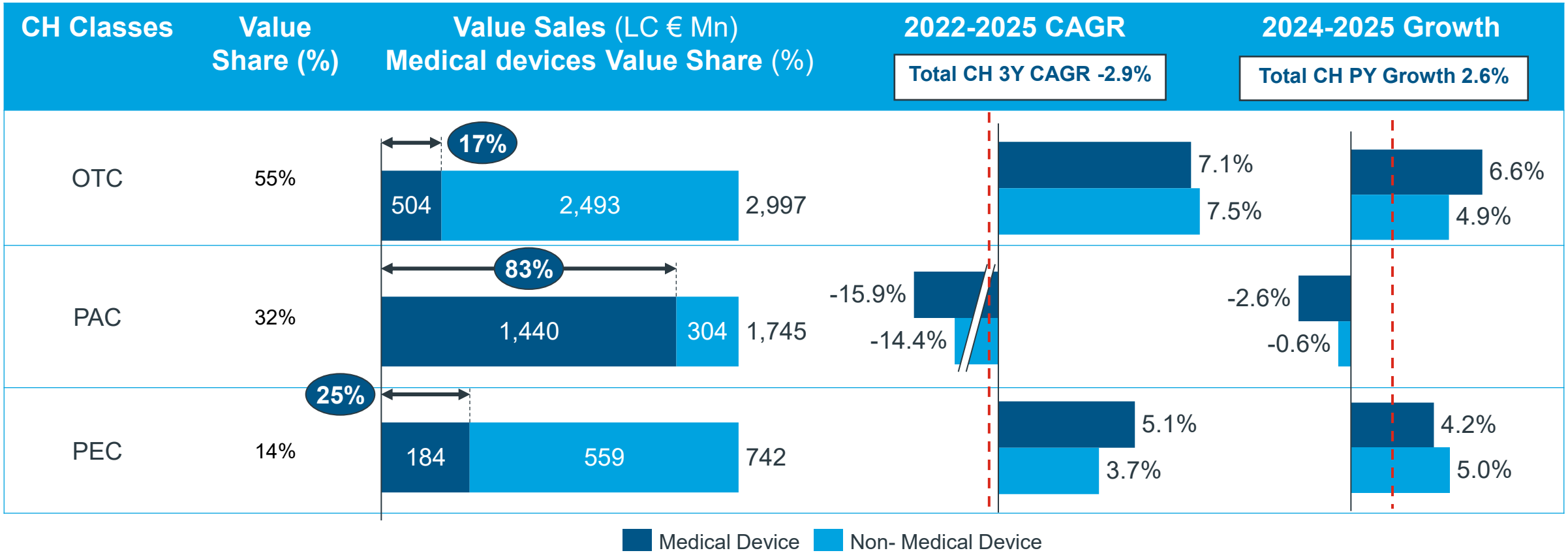
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Spain CH Performance by Classes

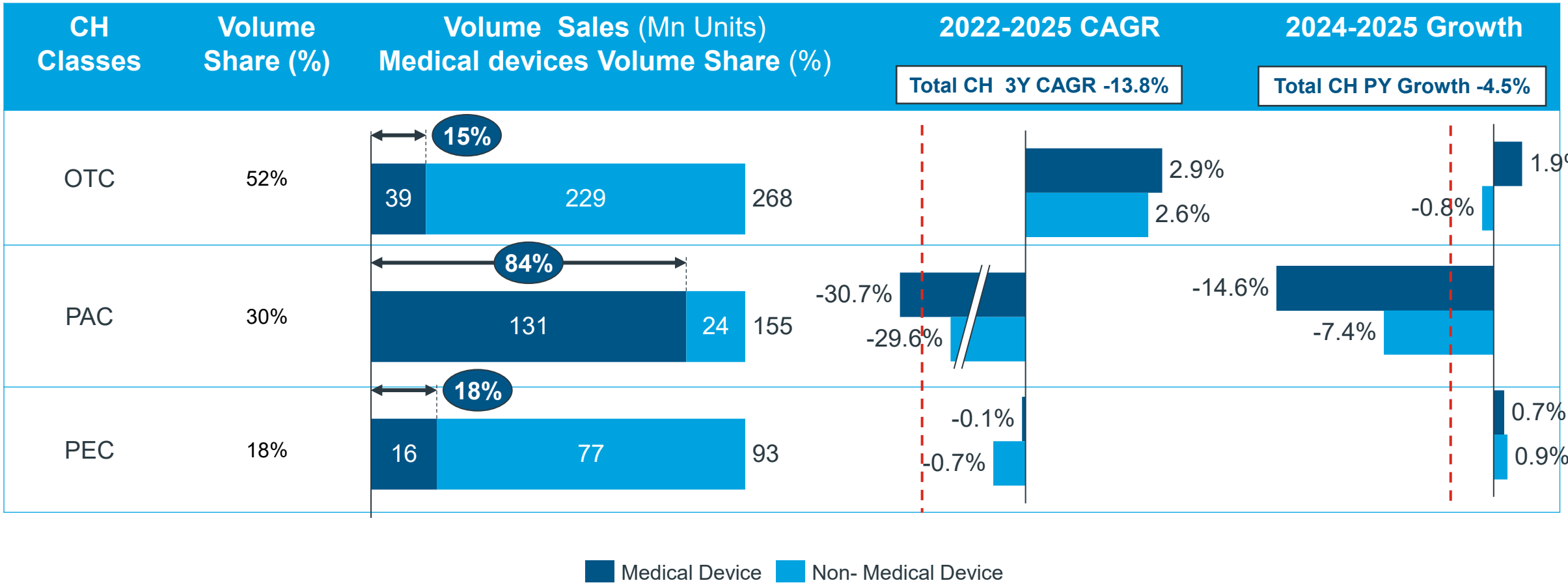
Patient care sector leads with €1.4 billion in value sales; however OTC segment witnesses a strong growth



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Spain CH Performance by Classes

Patient care leads in volume sales as well; witnesses decline in L-T and S-T



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Spain Medical Devices Packs & New Launches

Most medical device new packs fall within the patient care category

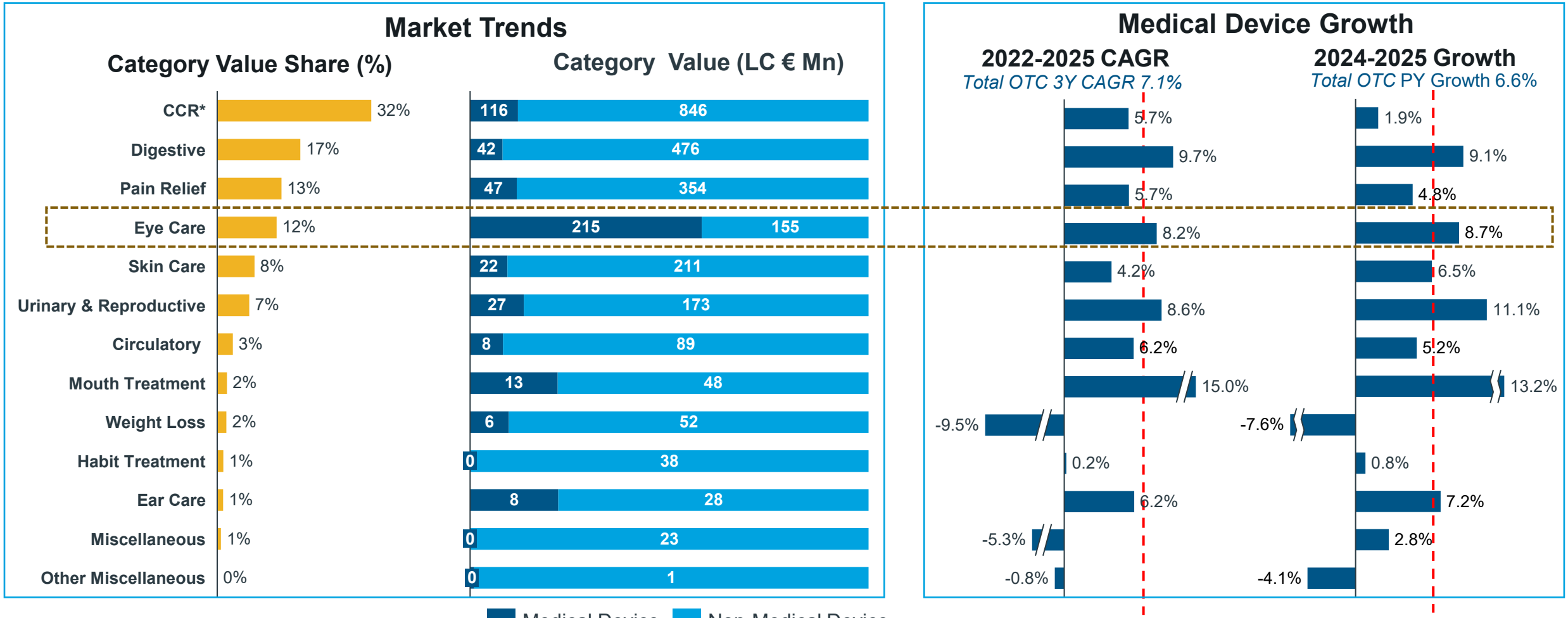
Category	Total Packs*			New Launches**		
CH Total	13,748	18,127	**31,875**	1,830	3,912	**5,742**
OTC	1,111	6,416	**7,527**	235	1,516	**1,751**
Patient Care	12,324	6,023	**18,347**	1,542	1,283	**2,825**
Personal Care	313	5,688	**6,001**	53	1,113	**1,166**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Spain OTC Performance by CHC 1 Category in 2025

*Eye care segment leads with value sales of **€0.2 Bn**, outperforming both L-T and S-T growth trends*

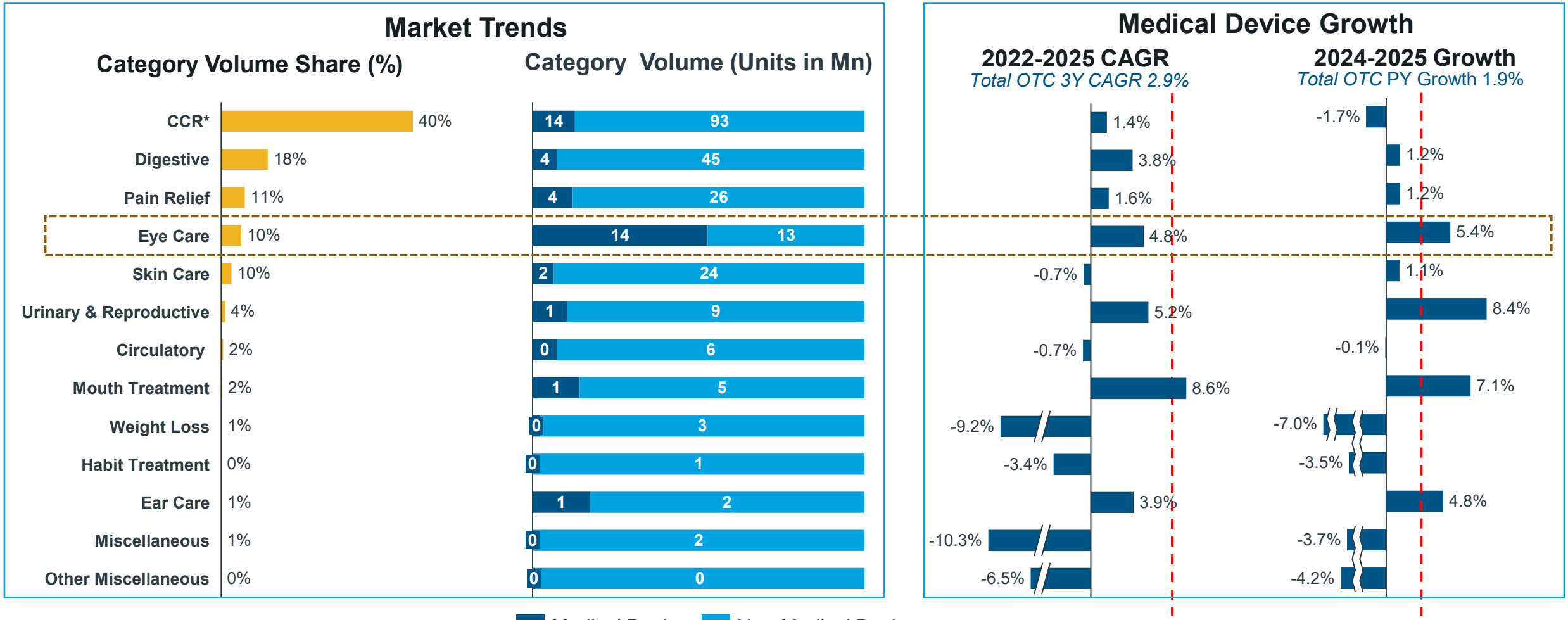


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Spain OTC Performance by CHC 1 Category in 2025

In terms of volume sales, the eye care segment also leads the category, recording 14Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Spain Medical Devices Performance by top CHC 2 Segments

*Nasal saline from the CCR is the leading category in CHC 2 segments with **€ 77.5Mn** in values*

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**504**	
Eye Care	43%	215.4	Not available
CCR	23%	115.6	Nasal Saline 77.5; Cough 24.8; Cold Remedies 9.1; Sore Throat 2.0
Pain Relief	9%	46.9	Mouth Pain 26.3; Muscular Pain 20.5; Joint Care 0.1; Dysmenorrhea 0.0
Digestive	8%	42.3	Antidiarrhoeals 14.7; Acid & Heartburn 12.2; Laxatives 8.4; Digestive 7.0
Urinary & Reproductive	5%	26.9	Urinary Condition 20.9; Gynaecological 5.7; Urology 0.3; Male Condition
Skin Care	4%	21.7	Wart/Corn Removal 6.4; Skin Protector/Emollients 4.0; Wound Healing 3.4; Psoriasis 2.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Spain Medical Devices Performance by top CHC 2 Segments

Mouth treatment and ear care segments together contribute 5% to total medical device value

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	3%	13.4	Other Mouth Treatment: 12.9; Mouth Infection: 0.5; Fluoride Products: 0.0
Ear Care	2%	8.1	Not available
Circulatory	2%	8.0	Antihemorrhoids: 7.8; Chloesterol Regulating: 0.2; Other Circulatory: 0.0
Weight Loss	1%	5.6	Not available
Miscellaneous	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control: 0.0; Nail Biting: 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Spain Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in volumes as well; CCR accounts for 34% of the total medical device volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**39.3**	
Eye Care	36%	14.1	Not available
CCR	34%	13.5	Nasal Saline 10.2; Cough 2.1; Cold Remedies 0.9; Sore Throat 0.3
Pain Relief	9%	3.6	Muscular Pain 1.8; Mouth Pain 1.8; Joint Care 0.0; Dysmenorrhea 0.0
Digestive	9%	3.5	Antidiarrhoeals 1.4; Acid & Heartburn 0.9; Laxatives 0.8; Digestive 0.4
Urinary & Reproductive	3%	1.1	Urinary Condition 0.8; Gynaecological 0.3; Urology 0.0; Male Condition 0.0
Skin Care	4%	1.7	Skin Protector/Emollients 0.5; Wart/Corn Removal 0.3; Hand Skin 0.3; Wound Disinfect 0.3; Wound Healing 0.2

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Spain Medical Devices Performance by top CHC 2 Segments

Mouth treatment products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	2%	0.8	Other Mouth Treatment 0.7; Mouth Infection 0.0; Fluoride Products 0.0
Ear Care	1%	0.5	Not available
Circulatory	1%	0.4	Antihemorrhoids 0.4; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0

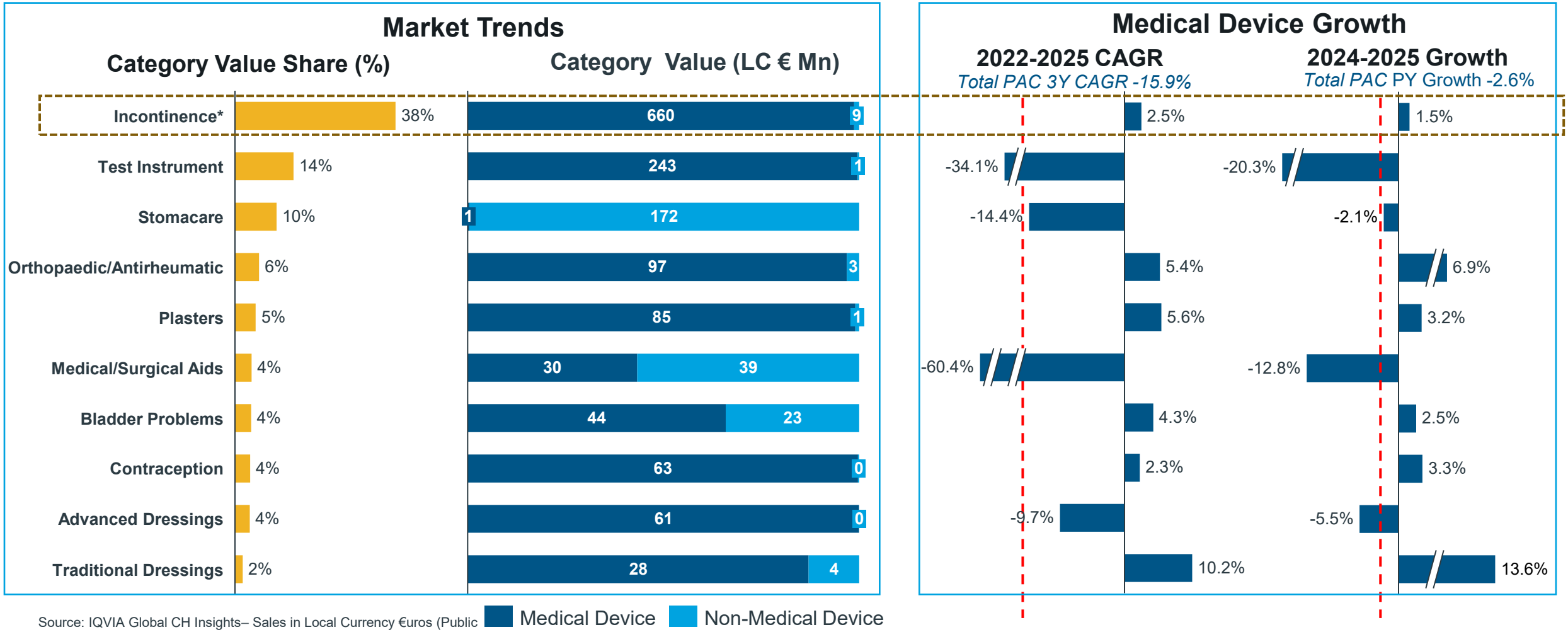
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Spain PAC Performance by CHC 1 Category in 2025 (1/2)

Incontinence leads medical devices values shares; however records flat growth

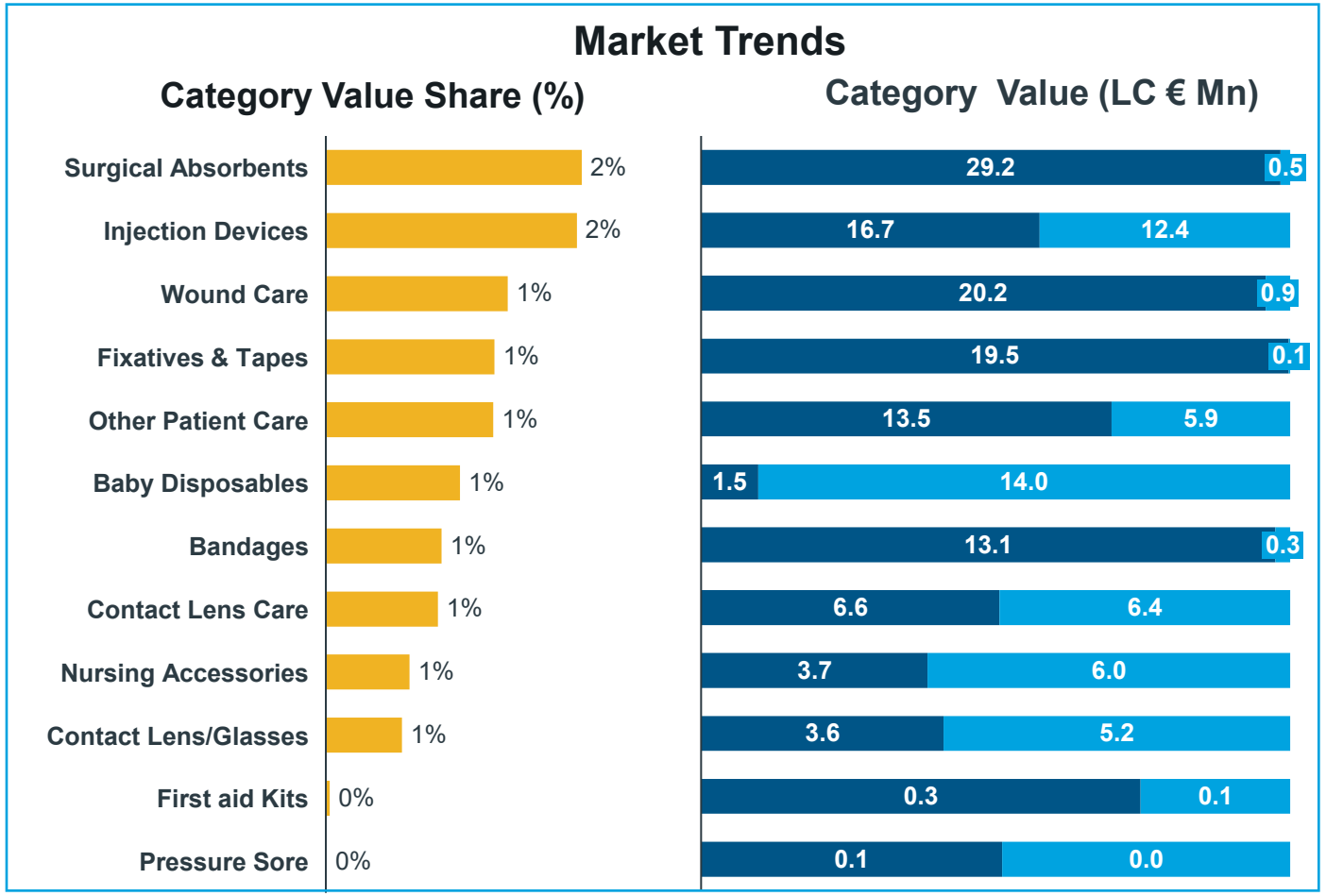


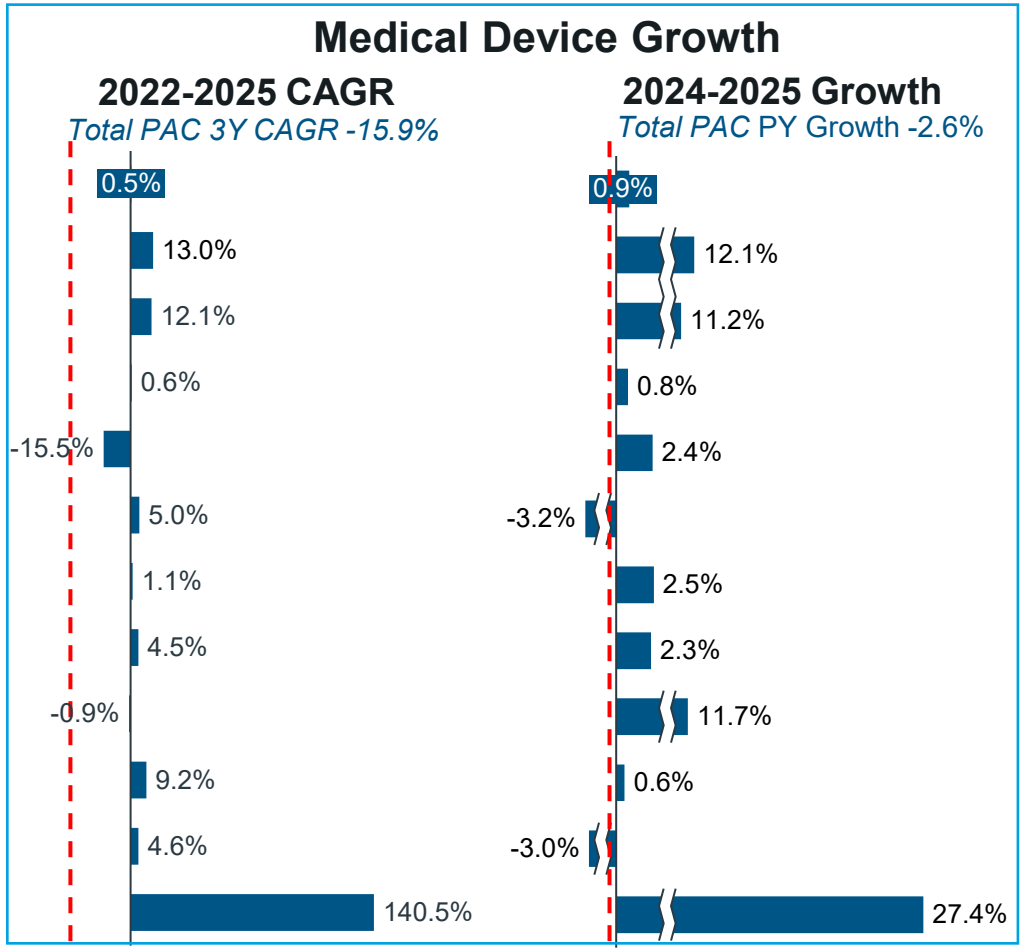
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Spain PAC Performance by CHC 1 Category in 2025 (2/2)

Most of the categories show a positive growth trend



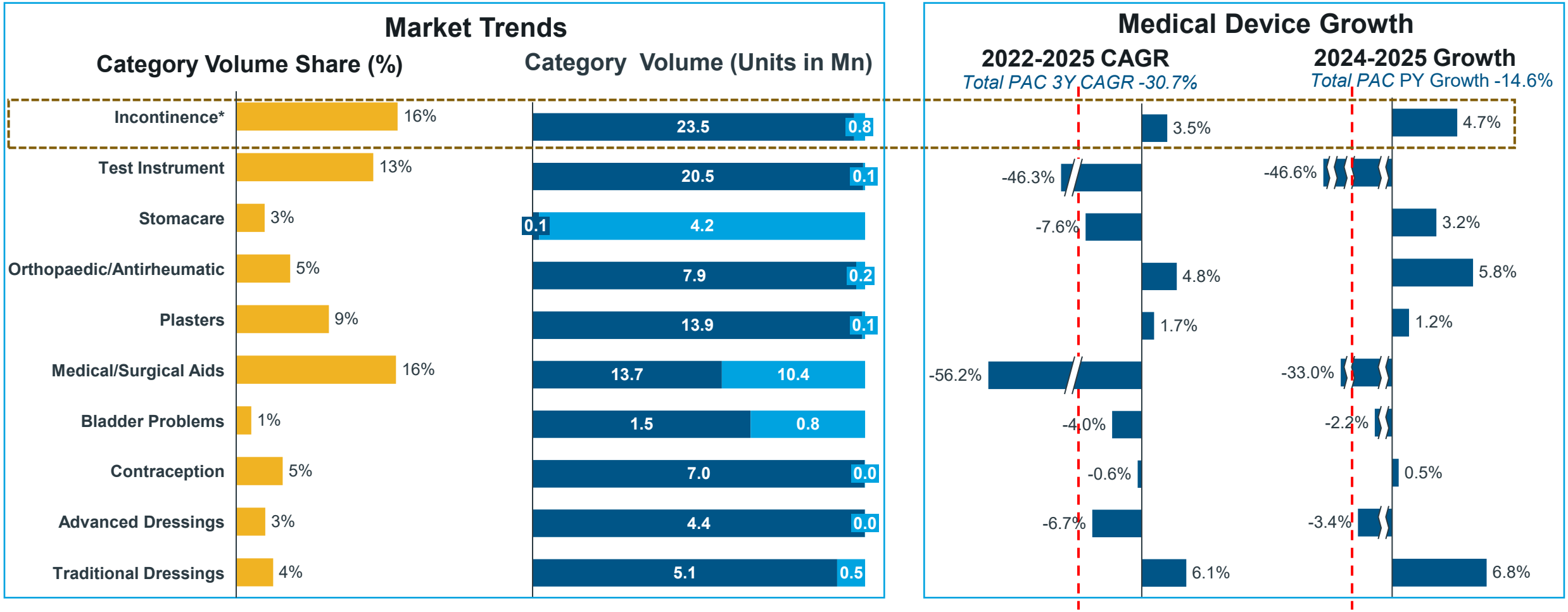


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Spain PAC Performance by CHC 1 Category (1/2)

Incontinence and test instruments contribute towards 30% of volumes



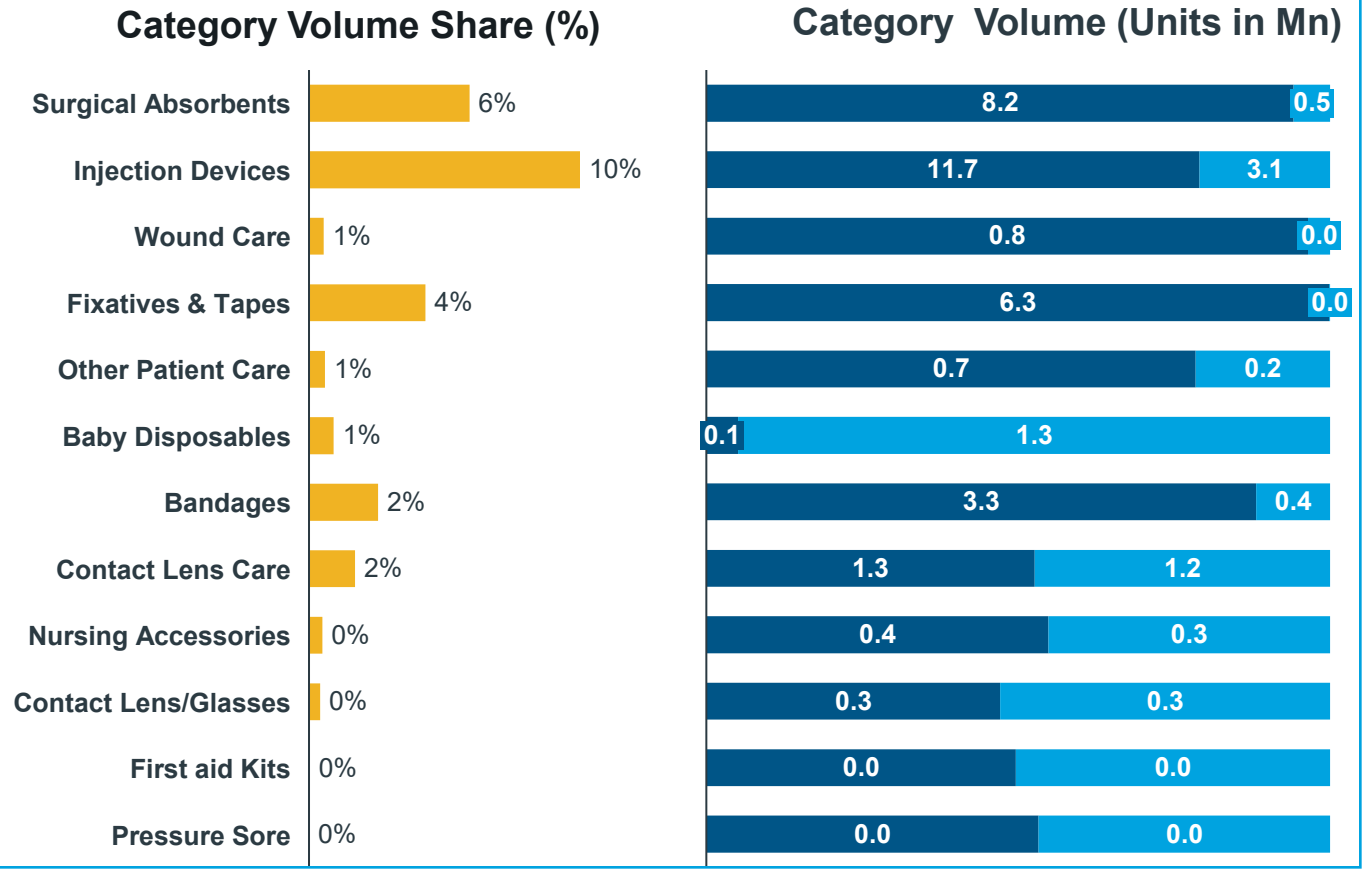
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

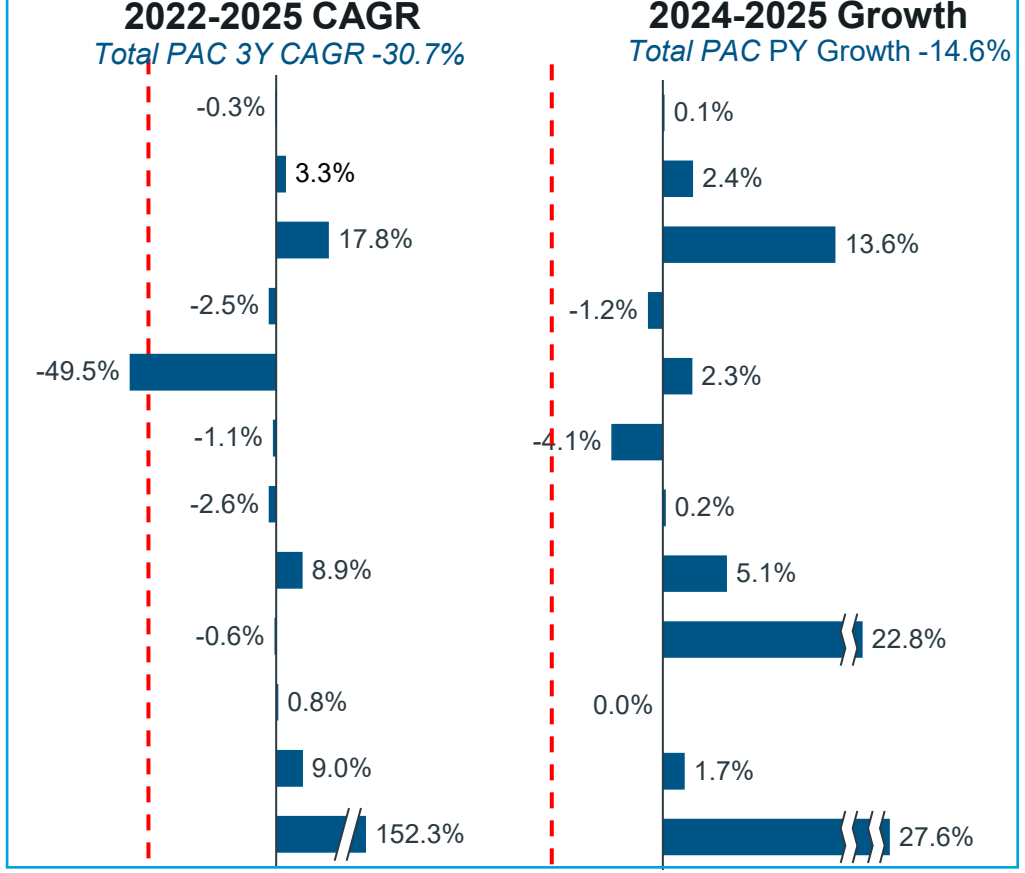
Spain PAC Performance by CHC 1 Category (2/2)

Despite an overall shrinking market, wound care, nursing care and Pressure sore are experiencing positive growth

Market Trends



Medical Device Growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Spain Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 80% of values; dominated by incontinence products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**1440.4**	
Incontinence	46%	659.9	Mod Heav Sev Incont. 618.8; Light Incontinence 32.9; Bed Sheets/Pads 7.5; Other Incontinence Prds 0.6
Test Instrument	17%	242.9	Gluc Measuring 118.9; Pregnancy Test 39.0; Blood Press Monitors 25.0; Thermometers 18.9
Orthopaedic/ Antirheumatic	7%	97.3	Curativ/Elastic Stocking 42.7; Belts Other Supp 35.4; Clogs+Orthopaedic Footwear 10.5; Corsets 4.4
Plasters	6%	85.3	Special Plaster 55.5; Plaster Strip 22.1; Liquid Plaster 5.3; Plaster Spec. Uses 2.4
Contraception	4%	62.9	Condoms 62.5; Intra-Uterine Devices 0.4; Spermicides 0.0; Other Topical 0.0
Advanced Dressings	4%	61.3	Base Tech 49.8; Anti-Infection 6.6; Hyaluron 4.9; Collagen 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Spain Medical Devices Performance by top CHC 2 Segments

Incontinence products lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**130.7**	
Incontinence	18%	23.5	Mod Heav Sev Incont. 17.0; Light Incontinence 5.9; Bed Sheets/Pads 0.6; Other Incontinence Prds 0.1
Test Instrument	16%	20.5	Multipurpose Test 5.8; Pregnancy Test 4.4; Gluc Measuring 4.2; Coronavirus Test 3.0
Orthopaedic/ Antirheumatic	6%	7.9	Curativ/Elastic Stocking 3.5; Belts Other Supp 3.4; Clogs+Orthopaedic Footwear 0.6; Equiment for Disabled 0.2
Plasters	11%	13.9	Plaster Strip 6.7; Special Plaster 6.2; Plaster Spec. Uses 0.5; Liquid Plaster 0.5
Contraception	5%	7.0	Condoms 7.0; Intra-Uterine Devices 0.0; Spermicides 0.0; Other Topical 0.0
Advanced Dressings	3%	4.4	Base Tech 3.6; Hyaluron 0.4; Anti-Infection 0.4; Collagen 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

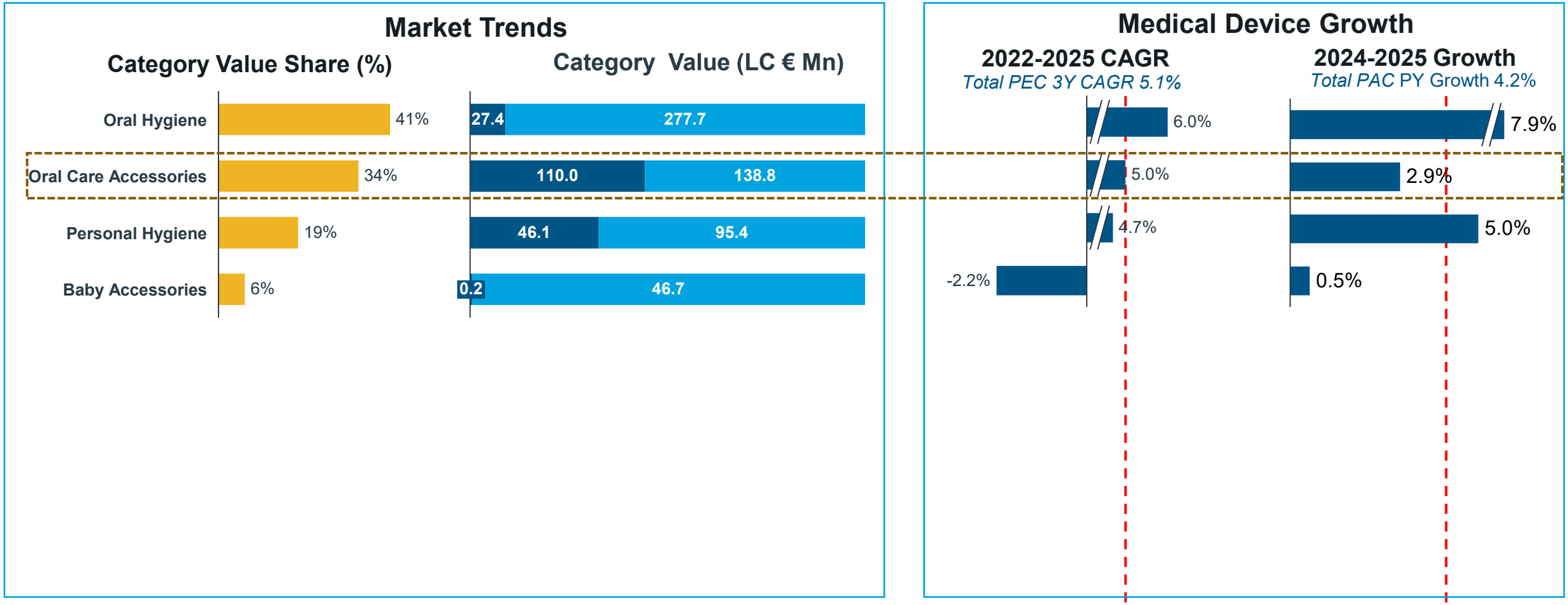
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Spain PEC Performance by CHC 1 Category

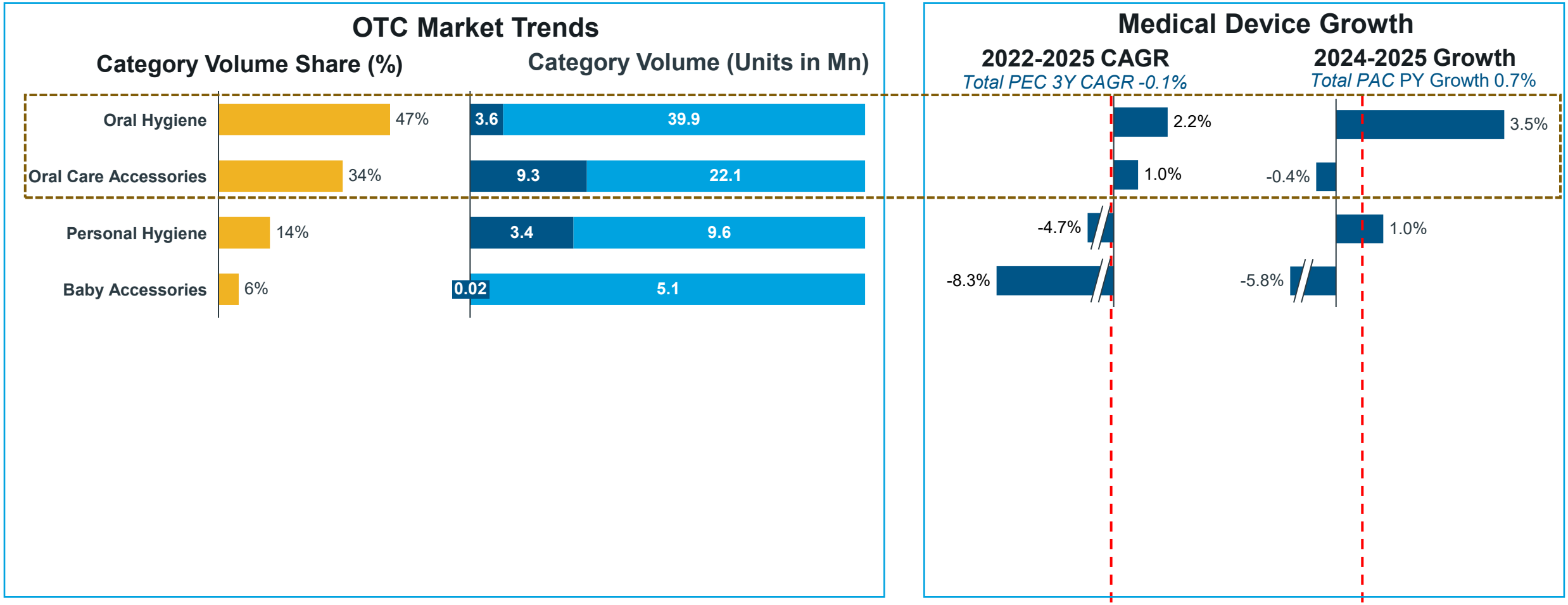
*With medical values at **€0.1Bn**, oral care accessories are leading in value*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Spain PEC Performance by CHC 1 Category

Oral care accessories lead in device volumes, while oral hygiene shows impressive S-T and L-T growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Spain Medical Devices Performance by top CHC 2 Segments

Oral care accessories holds the largest value share led by the denture products segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**183.7**	
Oral Care Accessories	60%	110.0	Denture Products 108.6; Toothbrushes 1.0; Dental Floss 0.3; Dental Sticks 0.1
Personal Hygiene	25%	46.1	Intimate Hygiene 45.2; Hand Hygeine w/o Soap 0.4; Foot Hygiene 0.4
Oral Hygiene	15%	27.4	Toothpastes 27.2; Mouthwashes 0.2; Other Oral Care 0.0
Baby Accessories	0%	0.2	Feeding Bottles &Acces. 0.2; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Spain Medical Devices Performance by top CHC 2 Segments

Similar to value trends, oral care accessories also dominate in terms of volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**16.4**	
Oral Care Accessories	57%	9.3	Denture Products 9.0; Toothbrushes 0.0; Dental Floss 0.2; Dental Sticks 0.1
Personal Hygiene	21%	3.4	Intimate Hygiene 3.1; Hand Hygeine w/o Soap 0.2; Foot Hygiene 0.1
Oral Hygiene	22%	3.6	Toothpastes 3.6; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Poland Medical Devices – Market Dynamics

Poland Medical Devices Performance Overview

Medical devices show overall positive short-term value growth, while OTC and Personal Care segments demonstrate long-term growth in value

32%

Medical device share of total CH value in 2025

Long –term Growth

5.7% by value

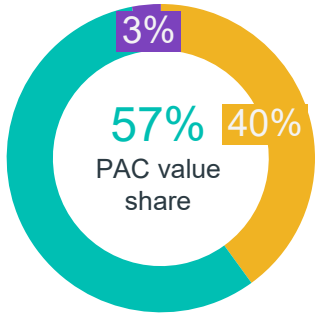
-2.0% by volume

Short –term Growth

5.9% by value

-0.8% by volume

Medical Devices – €1.21 Bn (2025)



Long-term Growth (Value)

4.0% PAC

8.4% OTC

5.6% PEC

Medical Devices Categories

27%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **69%** of new pack launches

Medical Devices Innovation

Test Instruments

33% *Share of total PAC values in 2025; Dominated by **Gluc Measuring***

Long-term Growth

-5.5% by value

PAC (Patient care)

CCR

38% *Share for total OTC value in 2025 Dominated by **Nasal Saline***

Long-term Growth

6.2% by value

OTC (Over-the-Counter)

Oral care accessories

84% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

5.1% by value

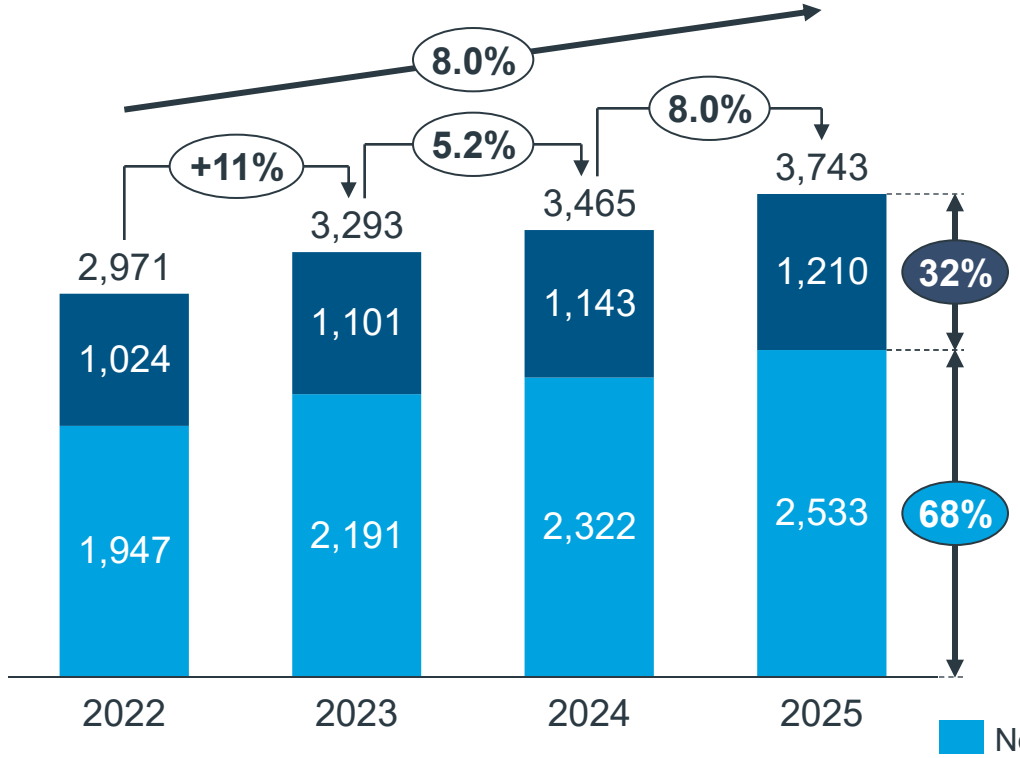
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

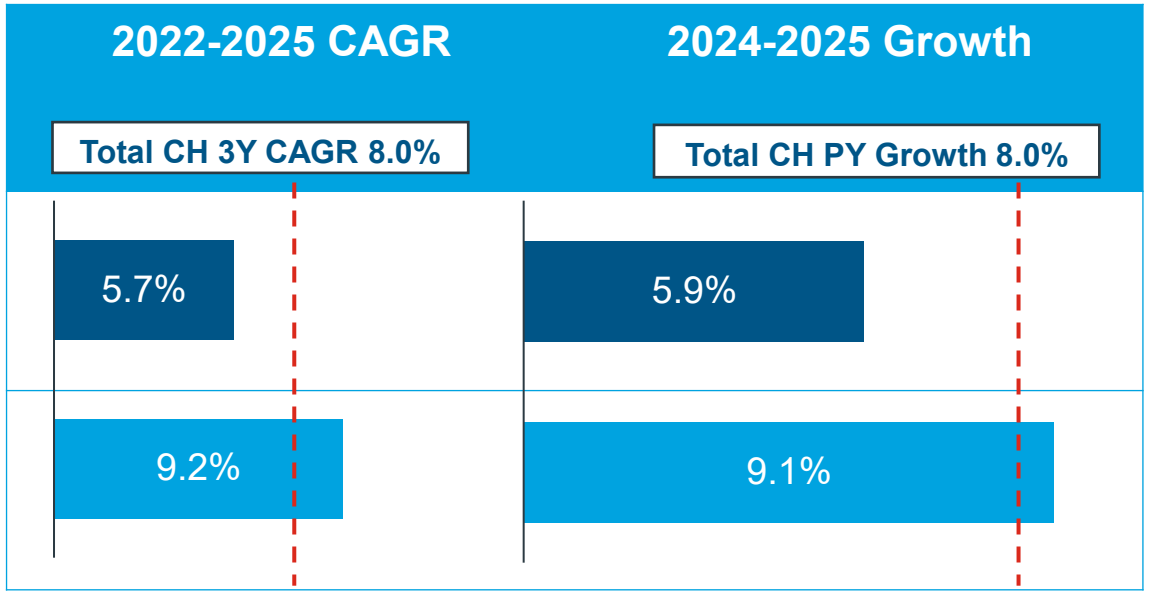
Poland CH Market Size & Growth

Medical devices make up 32% of CH market value, growing consistently at ~6% in both short and long term

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

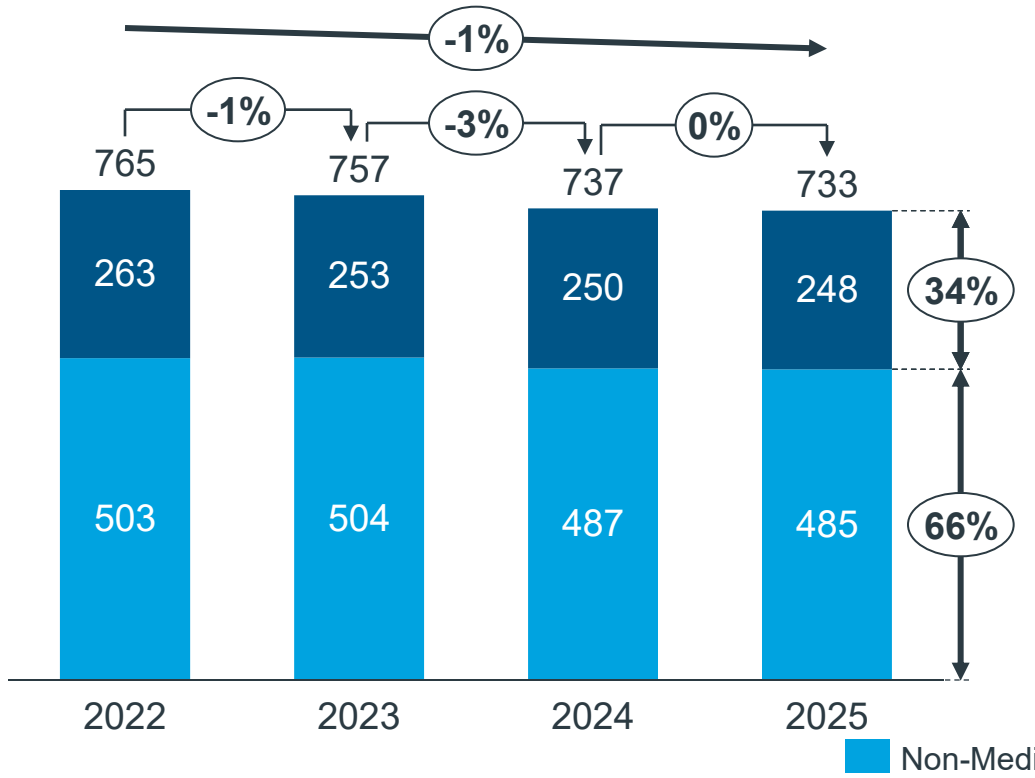


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

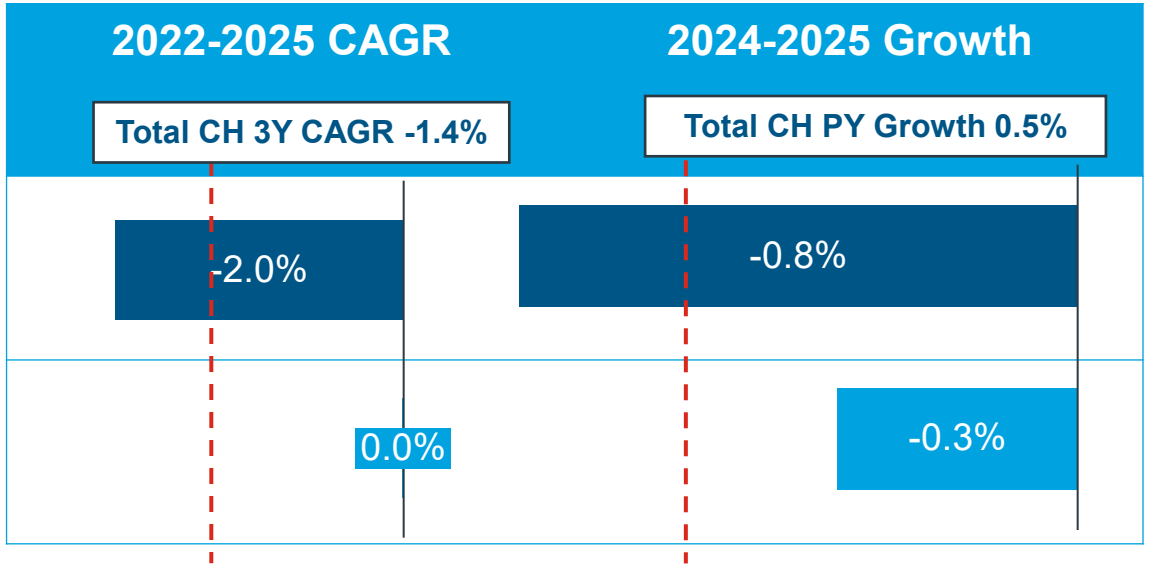
Poland CH Market Volume & Growth

Overall market volume share is on the decline with medical devices accounting for 34% of the total volumes

Market Volume (Mn Units), and Latest Volume Share (%)



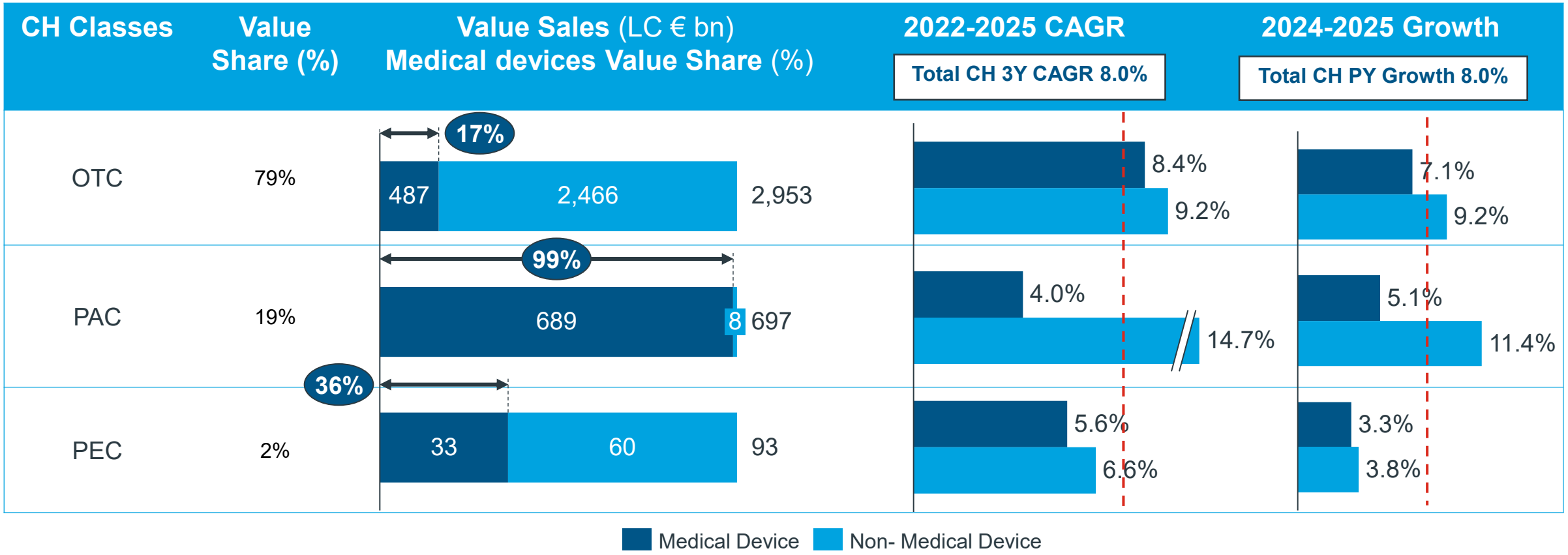
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Poland CH Performance by Classes

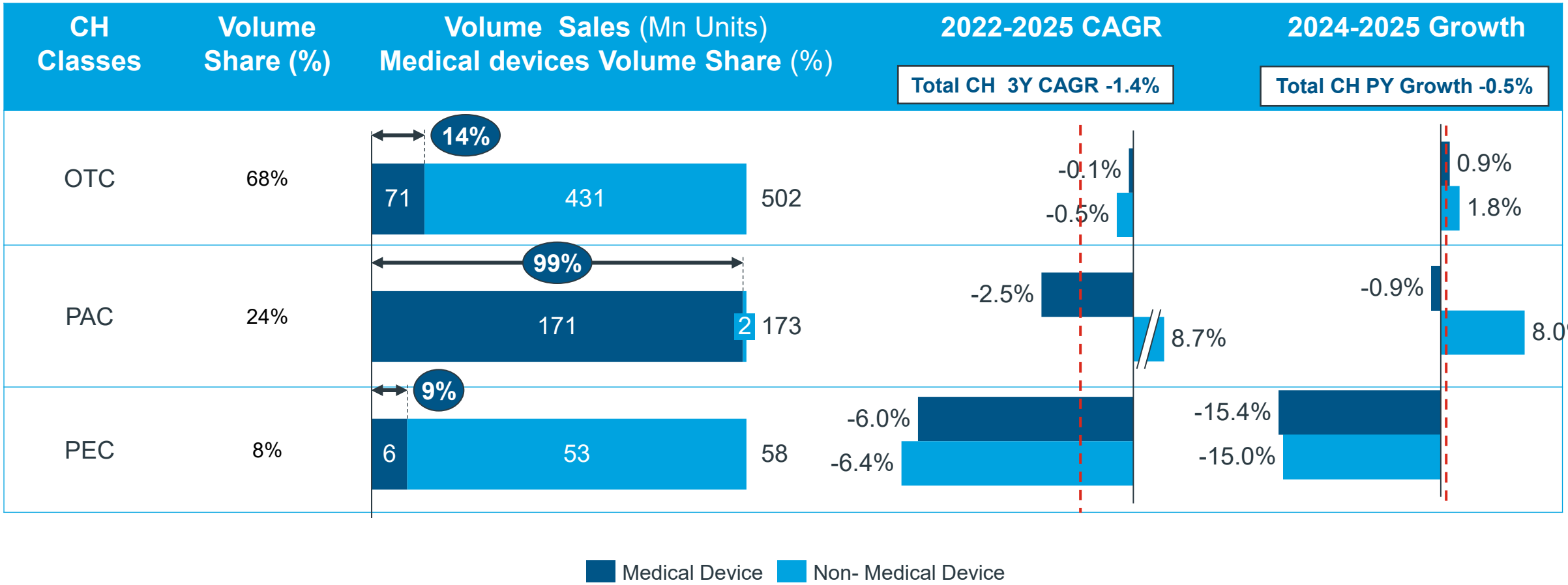
*With **€0.7 Bn** in sales, patient care segment is the top contributor to medical device value, while OTC segment records strong growth*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Poland CH Performance by Classes

Patient Care accounts 99% of its segment volume to medical devices with 171Mn unit sales



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Poland Medical Devices Packs & New Launches

Over the past three years, most new medical device launches have been in the Patient Care category

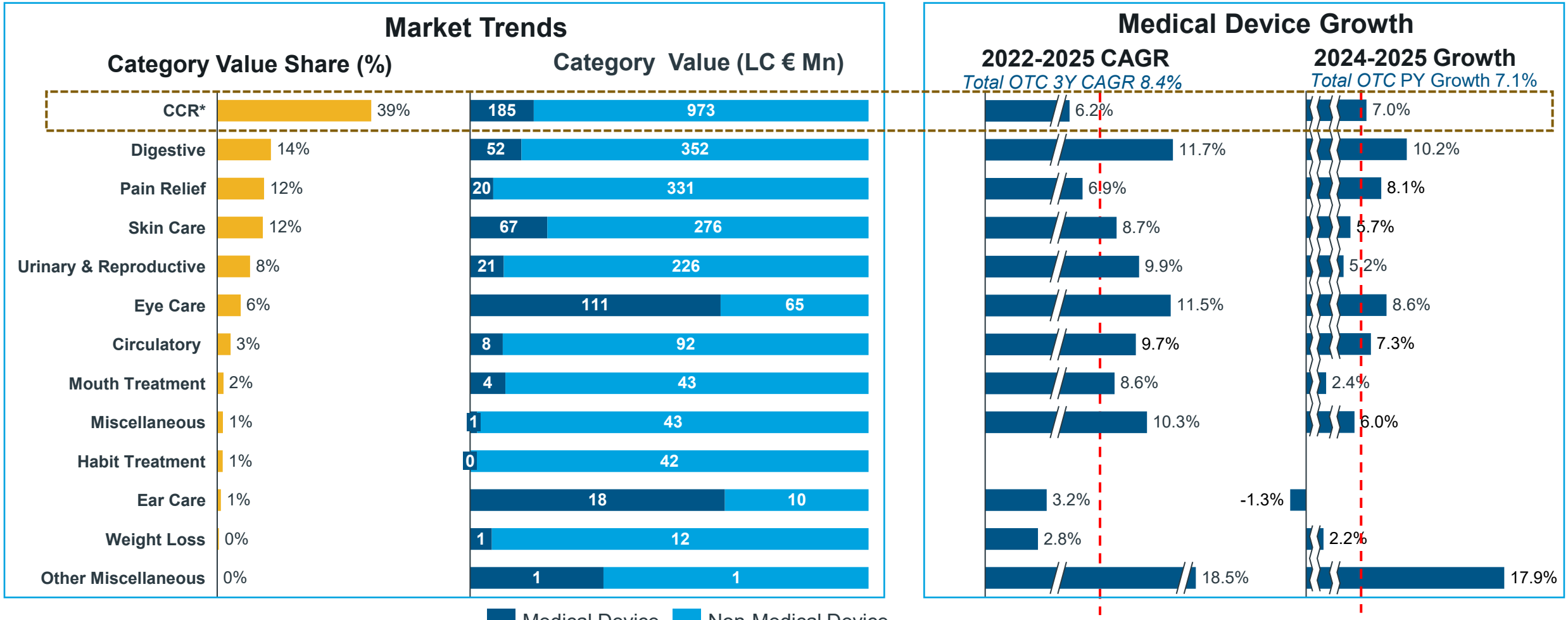
Category	Total Packs*	New Launches**
CH Total	1,870 / 5,178 / **7,048**	480 / 1,309 / **1,789**
OTC	637 / 4,473 / **5,110**	134 / 1,126 / **1,260**
Patient Care	1,162 / 177 / **1,339**	332 / 47 / **379**
Personal Care	71 / 528 / **599**	14 / 136 / **150**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Poland OTC Performance by CHC 1 Category in 2025

*CCR surpasses L-T & S-T growth, leads other segments with **€185 Mn** in medical device values*

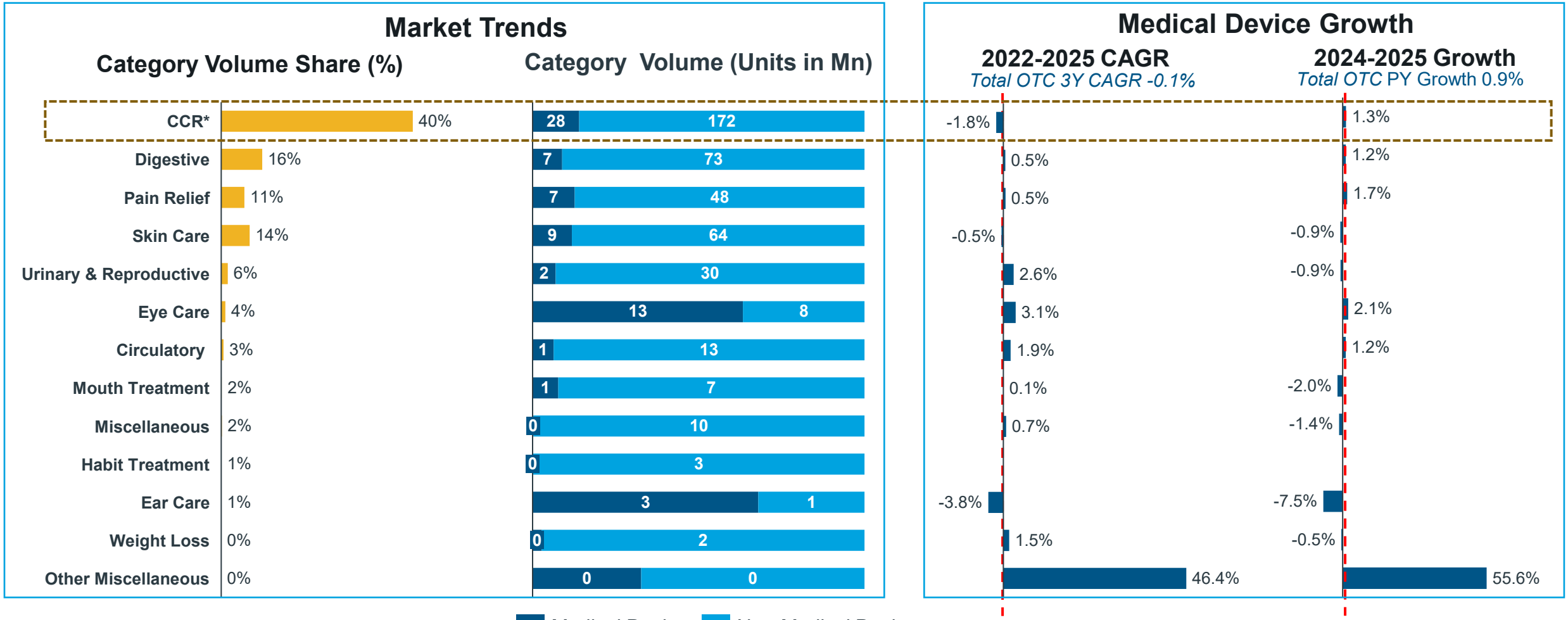


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Poland OTC Performance by CHC 1 Category in 2025

CCR holds the leading position in volume share at 40% and in medical device volumes with 28Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Poland Medical Devices Performance by top CHC 2 Segments

Over 90% of CH market value is concentrated in the top 6 categories with nasal saline leading in CCR

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**487.5**	
CCR	38%	185.0	Nasal Saline 74.3; Sore Throat 46.7; Cough 35.4; Other Respiratory 13.2
Eye Care	23%	110.7	Not available
Skin Care	14%	66.5	Skin Protector/Emollients 28.4; Wound Healing 16.7; Skin Irritation 6.2; Wart/Corn Removal 5.8
Digestive	11%	52.0	Laxatives 17.4; Acid & Heartburn 15.6; Digestive 14.1; Antidiarrhoeals 4.9
Urinary & Reproductive	4%	20.8	Gynaecological 19.5; Urinary Condition 1.0; Urology 0.2; Male Condition
Pain Relief	4%	20.4	Muscular Pain 13.1; Mouth Pain 7.3; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Poland Medical Devices Performance by top CHC 2 Segments

Smaller categories like ear care, circulatory and mouth treatment cover <10% of the value share

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	4%	17.6	Not available
Circulatory	2%	8.2	Antihemorrhoids 8.0; Chloesterol Regulating 0.2; Other Circulatory 0.0
Mouth Treatment	1%	4.1	Other Mouth Treatment 2.1; Mouth Infection 2.0; Fluoride Products 0.0
Miscellaneous	0%	0.8	Not available
Weight Loss	0%	0.7	Not available
Other Miscellaneous	0%	0.6	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Poland Medical Devices Performance by top CHC 2 Segments

CCR accounts for 40% of the total medical device volumes and is led by nasal saline here as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**70.9**	
CCR	40%	28.1	Nasal Saline 11.4; Sore Throat 7.9; Cough 5.1; Other Respiratory 1.6
Eye Care	19%	13.4	Not available
Skin Care	12%	8.5	Skin Protector/Emollients 3.7; Wound Healing 2.1; Hand Skin Wound Disinfect 0.9; Skin Irritation 0.9
Digestive	10%	7.2	Digestive 2.6; Laxatives 2.3; Acid & Heartburn 1.6; Antidiarrhoeals 0.6
Urinary & Reproductive	3%	2.2	Gynaecological 2.1; Urinary Condition 0.1; Urology 0.0; Male Condition 0.0
Pain Relief	10%	7.0	Muscular Pain 5.7; Mouth Pain 1.3; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Poland Medical Devices Performance by top CHC 2 Segments

Ear care, circulatory and mouth treatment products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	4%	2.7	Not available
Circulatory	1%	0.9	Antihemorrhoids 0.9; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.6	Mouth Infection 0.3; Other Mouth Treatment 0.3; Fluoride Products 0.0
Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.2	
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

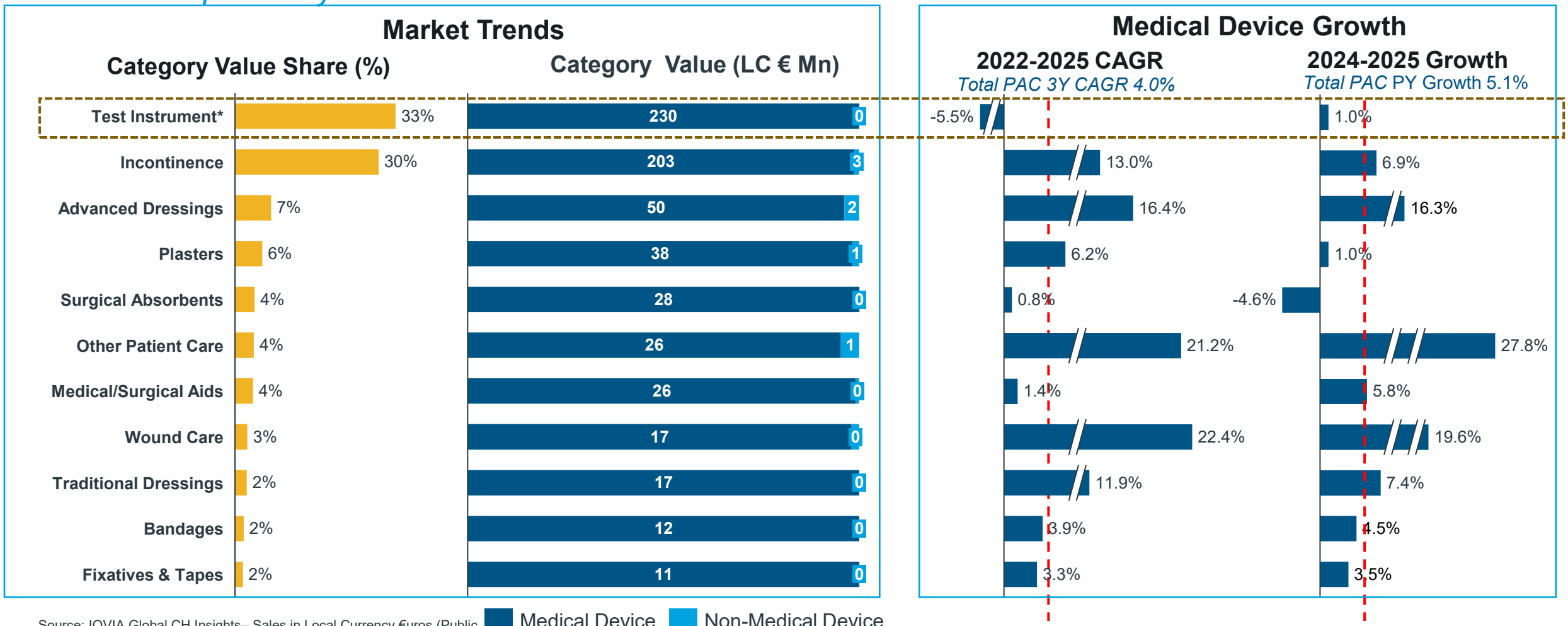
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Poland PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments and Incontinence products leads medical devices values with **€230 Mn and €203 Mn** in sales respectively*



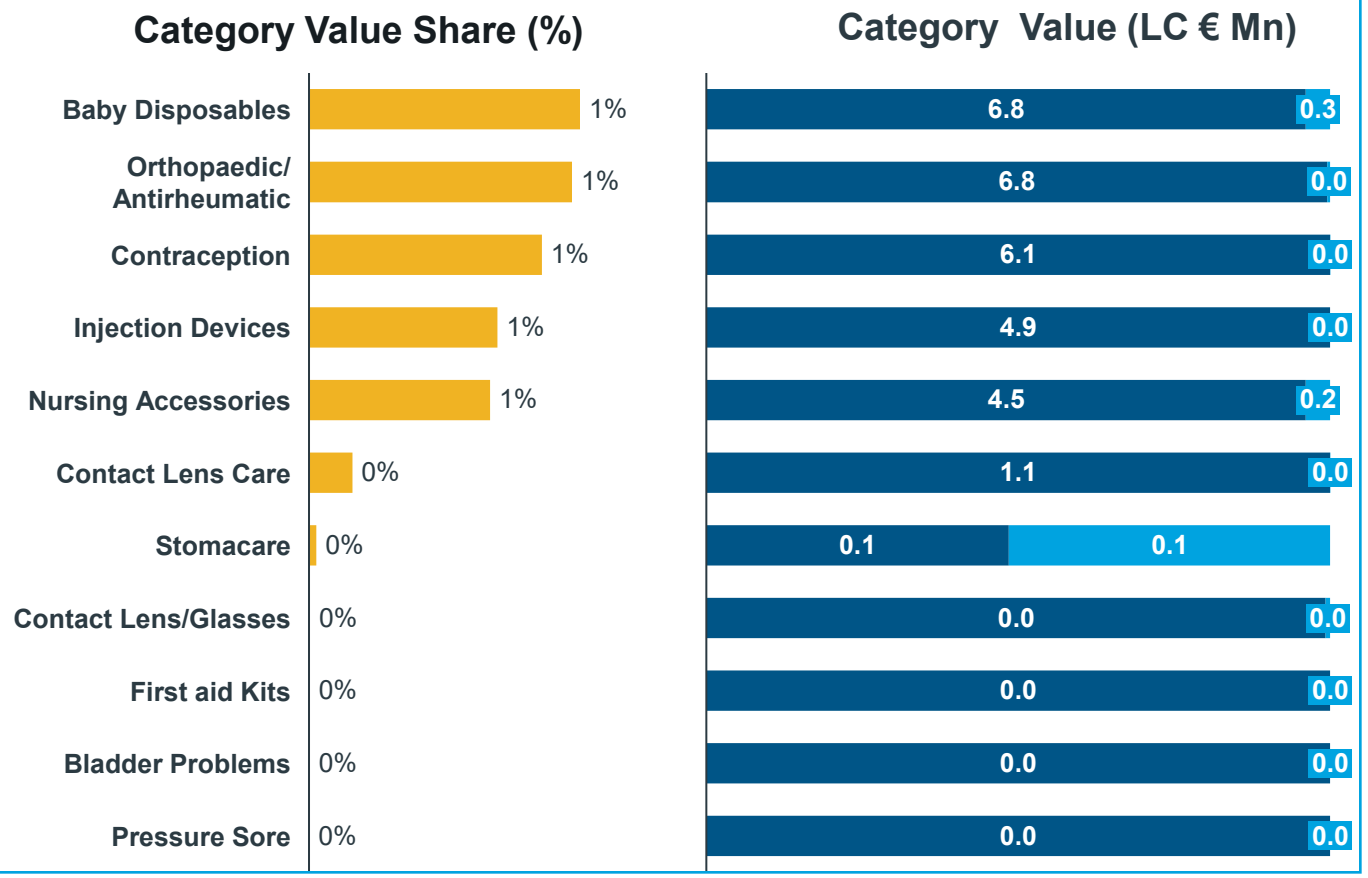
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

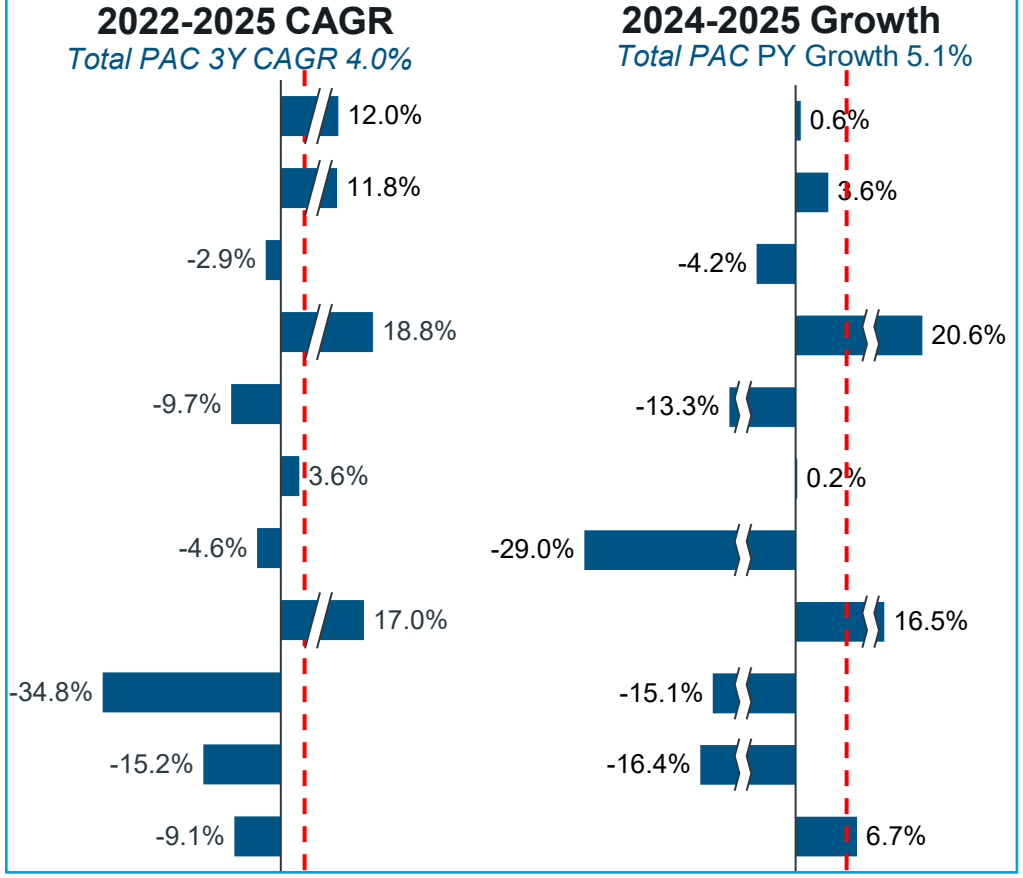
Poland PAC Performance by CHC 1 Category in 2025 (2/2)

Injection devices and contact lenses demonstrated significant growth potential in the previous year

Market Trends



Medical Device Growth

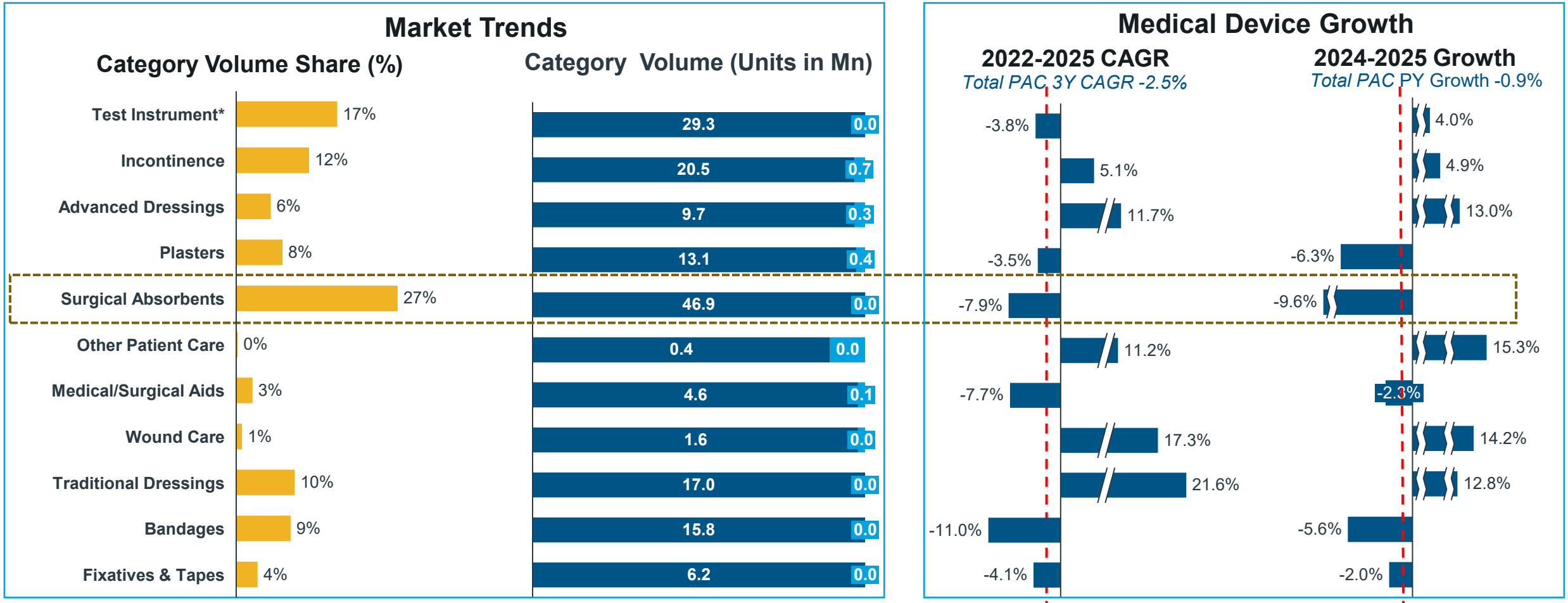


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Poland PAC Performance by CHC 1 Category (1/2)

While test instruments brought in sales value, surgical absorbents had the largest sales volume



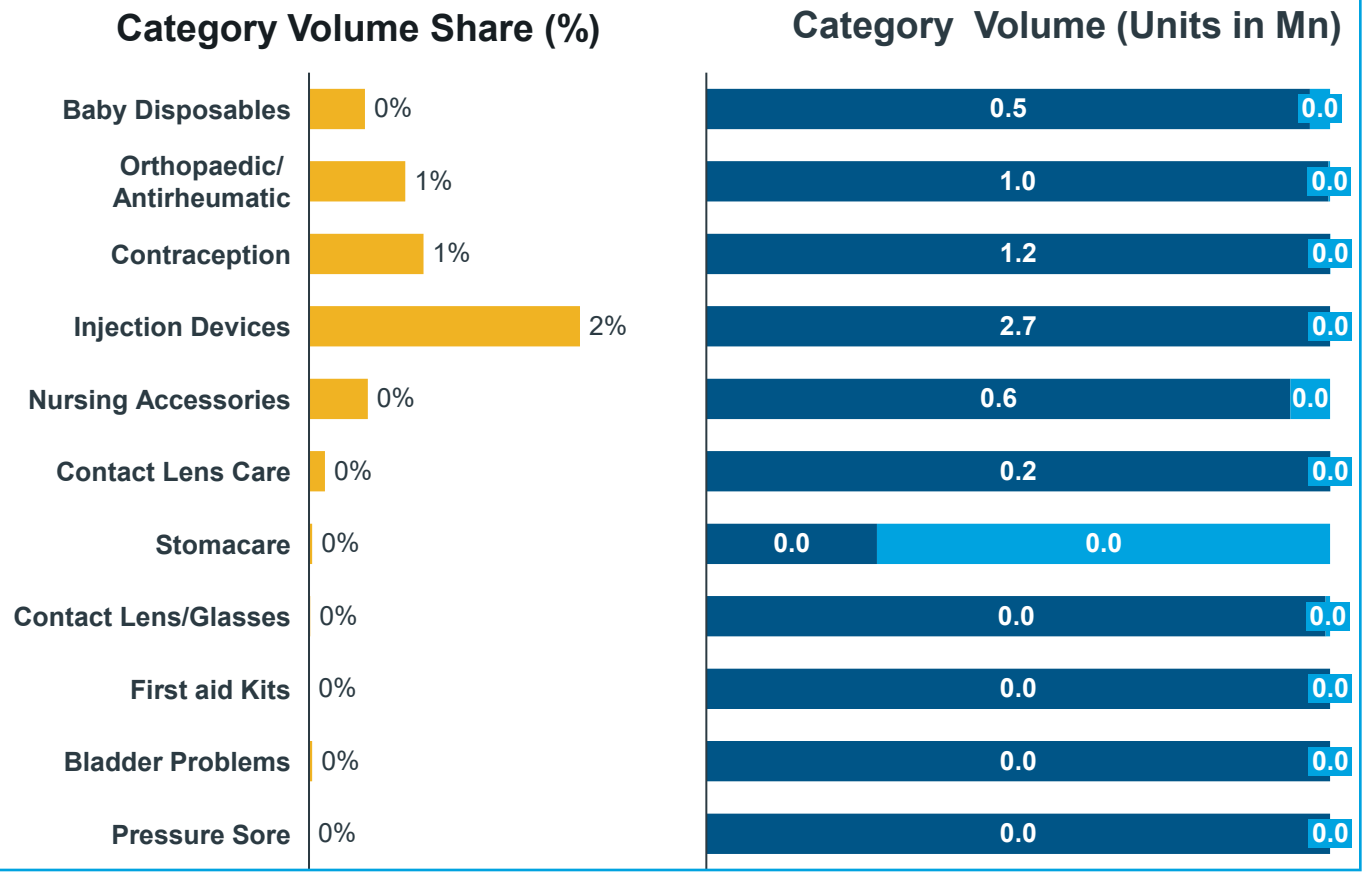
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

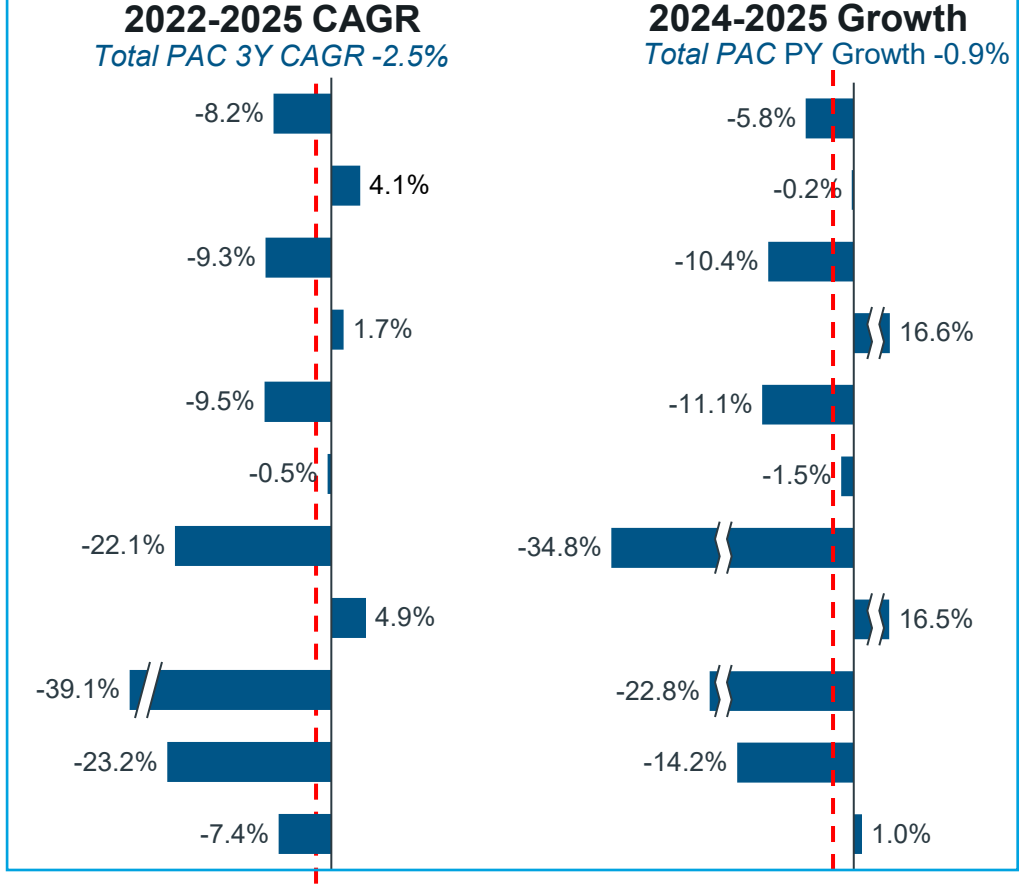
Poland PAC Performance by CHC 1 Category (2/2)

Despite the overall market downturn, categories such as orthopaedic/antirheumatic products, injection devices, and contact lenses continue to experience growth

Market Trends



Medical Device Growth



Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Poland Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 80% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**689.1**	
Test Instrument	33%	230.1	Gluc Measuring 155.2; Coronavirus Test 24.8; Blood Press Monitors 18.0; Thermometers 12.2
Incontinence	29%	203.0	Mod Heav Sev Incont. 137.3; Light Incontinence 48.8; Bed Sheets/Pads 17.0; Incontinence care 0.0
Advanced Dressings	7%	49.8	Anti-Infection 25.6; Base Tech 22.5; Hyaluron 1.6; Other 0.1
Plasters	6%	38.3	Plaster Strip 20.9; Special Plaster 16.0; Liquid Plaster 1.1; Plaster Spec. Uses 0.4
Surgical Absorbents	4%	28.3	Swabs & Pads 17.9; Cotton wool 8.6; Packs & Patches 1.7
Other Patient Care	4%	25.8	Not Available

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Poland Medical Devices Performance by top CHC 2 Segments

Test instruments lead in volume share with 17% of total medical device sales

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**171.3**	
Test Instrument	17%	29.3	Gluc Measuring 15.3; Coronavirus Test 6.7; Pregnancy Test 3.9; Thermometers 1.3
Incontinence	12%	20.5	Mod Heav Sev Incont. 8.6; Light Incontinence 8.3; Bed Sheets/Pads 3.5; Incontinence care 0.0
Advanced Dressings	6%	9.7	Base Tech 5.1; Anti-Infection 4.4; Hyaluron 0.2; Other 0.0
Plasters	8%	13.1	Plaster Strip 10.0; Special Plaster 2.8; Liquid Plaster 0.2; Plaster Spec. Uses 0.1
Surgical Absorbents	27%	46.9	Swabs & Pads 37.0; Cotton wool 9.3; Packs & Patches 0.6
Other Patient Care	0%	0.4	Not available

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

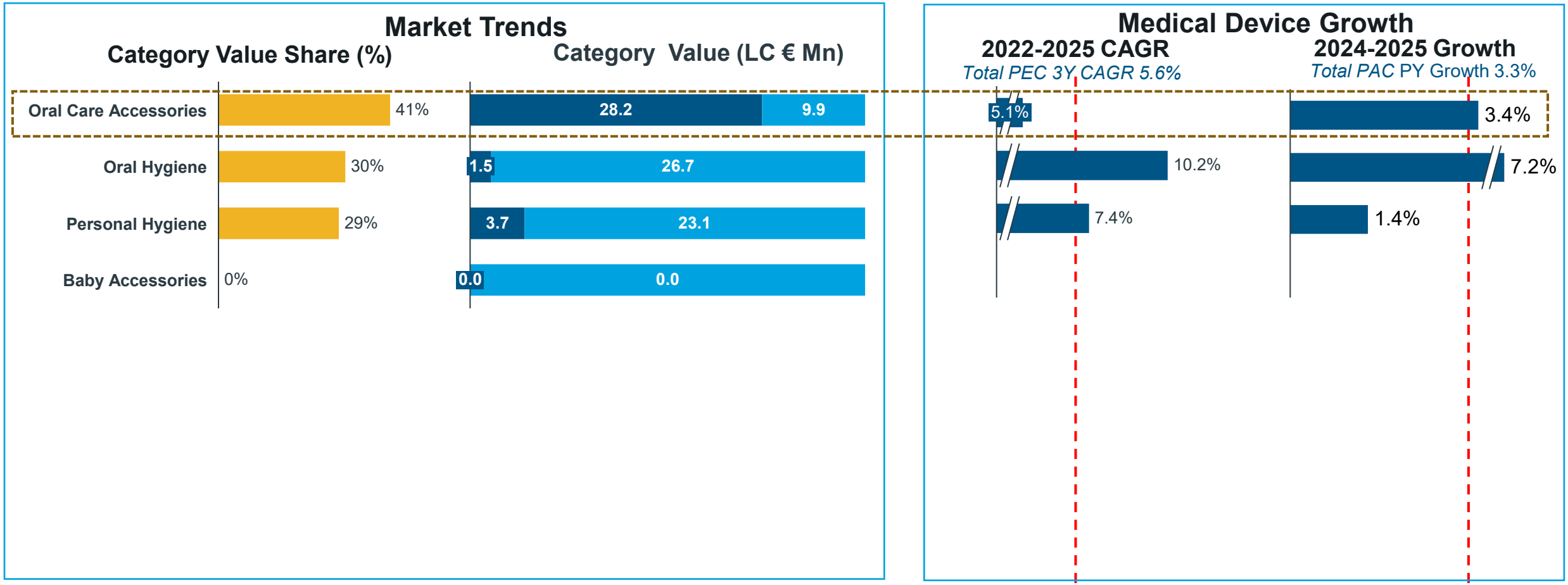
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Poland PEC Performance by CHC 1 Category

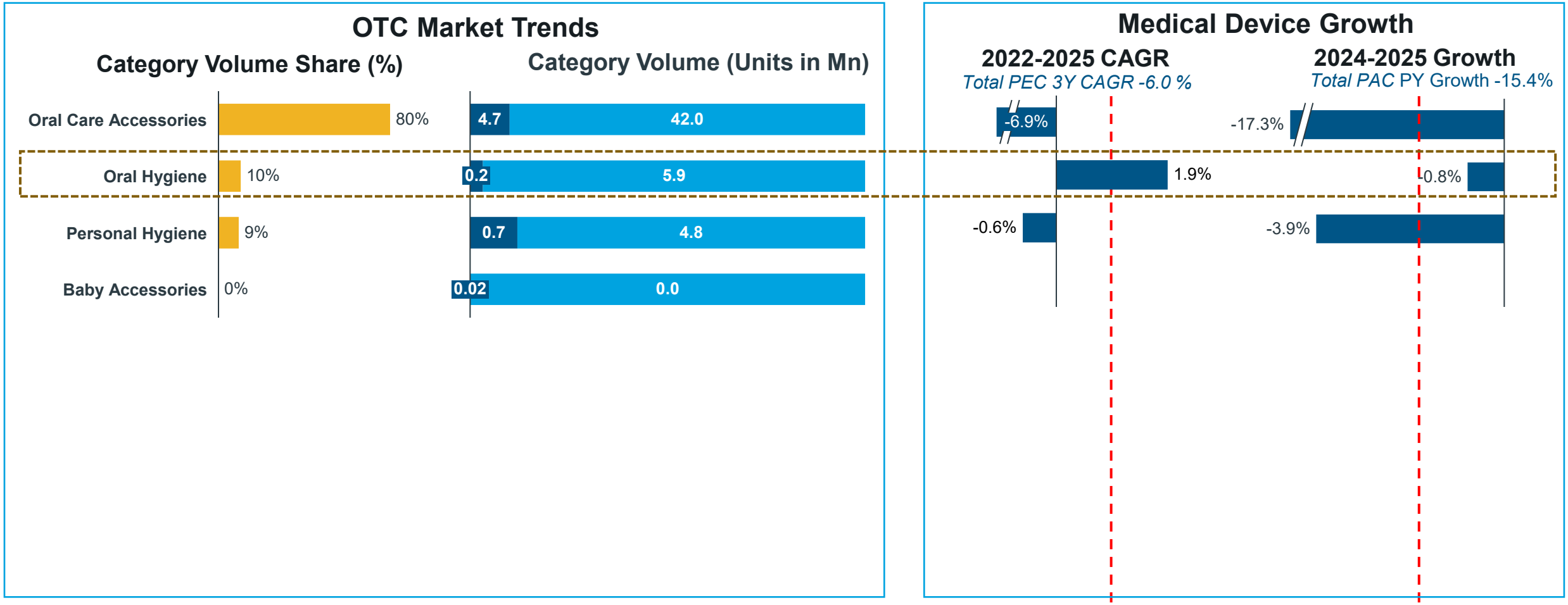
Oral hygiene products and accessories account for over 70% of value sales, with oral hygiene products showing rapid growth in both the short and long term



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Poland PEC Performance by CHC 1 Category

Oral hygiene continues to experience steady long-term growth even as other segments decline



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Poland Medical Devices Performance by top CHC 2 Segments

Denture products in oral care accessories represent the highest value segment of the market

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**33.4**	
Oral Care Accessories	84%	28.2	Denture Products 26.6; Other Oral Care Acces. 0.9; Toothbrushes 0.5; Dental Floss 0.1
Personal Hygiene	11%	3.7	Intimate Hygiene 3.7; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	5%	1.5	Mouthwashes 0.8; Toothpastes 0.7; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Poland Medical Devices Performance by top CHC 2 Segments

Denture products in Oral care accessories leads in volume as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**5.5**	
Oral Care Accessories	85%	4.7	Denture Products 4.4; Other Oral Care Acces. 0.1; Toothbrushes 0.1; Dental Floss 0.0
Personal Hygiene	12%	0.7	Intimate Hygiene 0.7; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	4%	0.2	Mouthwashes 0.1; Toothpastes 0.1; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Belgium Medical Devices – Market Dynamics

Belgium Medical Devices Performance Overview

Medical devices record a flat growth over the past years, valued at €0.86 Bn in 2025

30%

Medical device share of total CH value in 2025

Long –term Growth

-7.2% by value

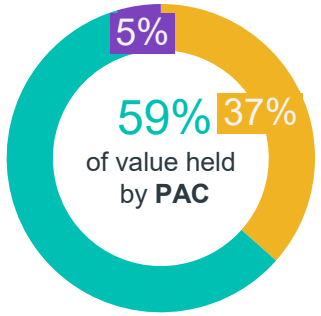
-12.7% by

Short –term Growth

1.7% by value

-2.3% by volume

Medical Devices – €867 Mn(2025)



Long-term Growth (Value)

-12.9% PAC | **4.5%** OTC | **5.2%** PEC

Medical Devices Categories

47%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **94%** of new pack launches

Medical Devices Innovation

Test Instruments

18% Share of total PAC values in 2025; Dominated by **Glucose measuring**

Long-term Growth

-39.1% by value

PAC (Patient care)

Eye Care

35% Share for total OTC value in 2025

Long-term Growth

7.4% by value

OTC (Over-the-Counter)

Oral Care Accessories

52% *Share of total PEC value share in 2025; Dominated by* ***Denture products***

Long term Growth

4.1% by value

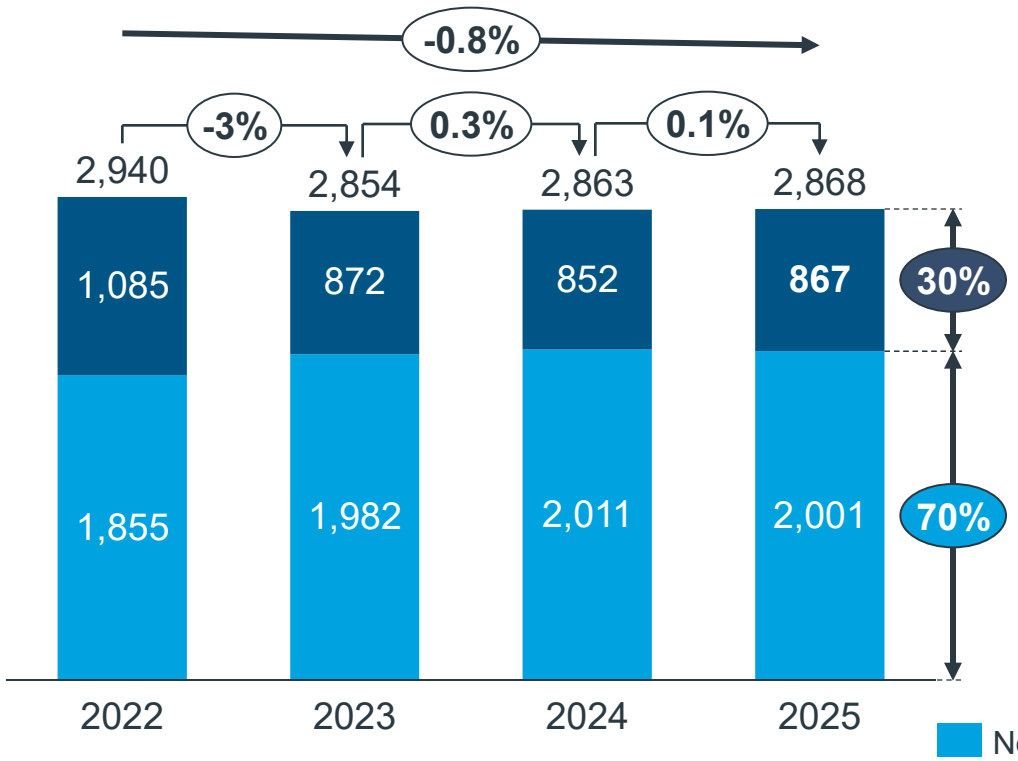
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

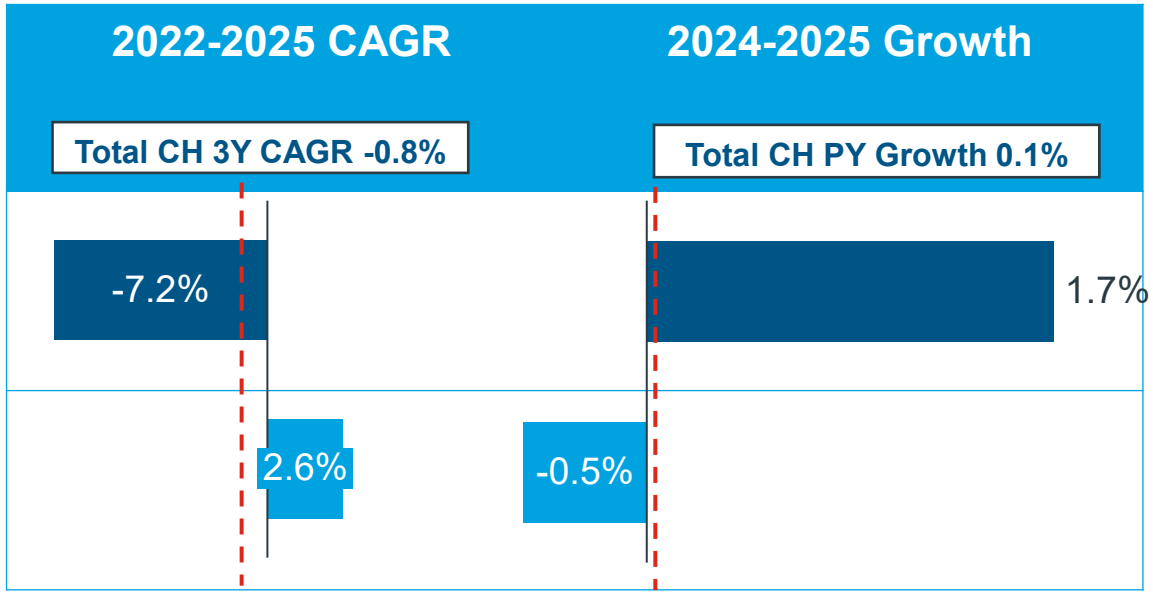
Belgium CH Market Size & Growth

The CH market is valued at €2.9 billion in 2025; 30% of which is represented by medical devices

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

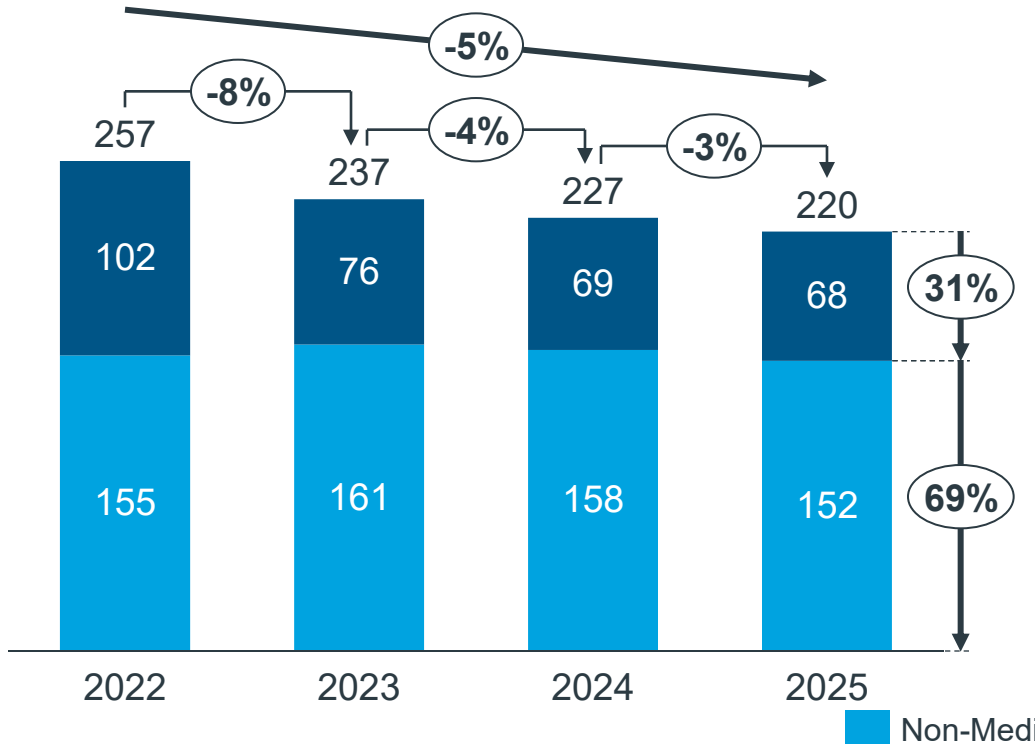


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

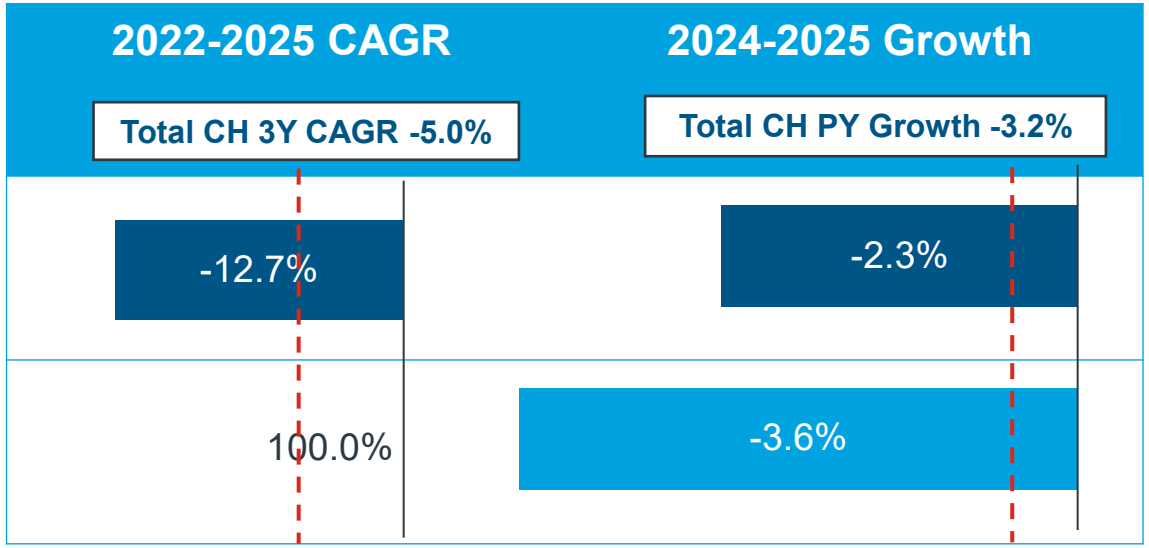
Belgium CH Market Volume & Growth

Medical devices represent 31% of the volume share, declining both in L-T and S-T

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Belgium CH Performance by Classes

Patient care segment contributes the most to medical device segment; valued at €510 Mn

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR (Total CH 3Y CAGR -0.8%)	2024-2025 Growth (Total CH PY Growth 0.1%)
OTC	73%	15%; 317 / 1,772 / 2,089	4.5% / 2.4%	2.5% / -1.1%
PAC	21%	84%; 510 / 94 / 603; 23%	-12.9% / 1.2%	1.0% / 1.0%
PEC	6%	40 / 135 / 175	5.2% / 5.9%	4.6% / 7.3%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

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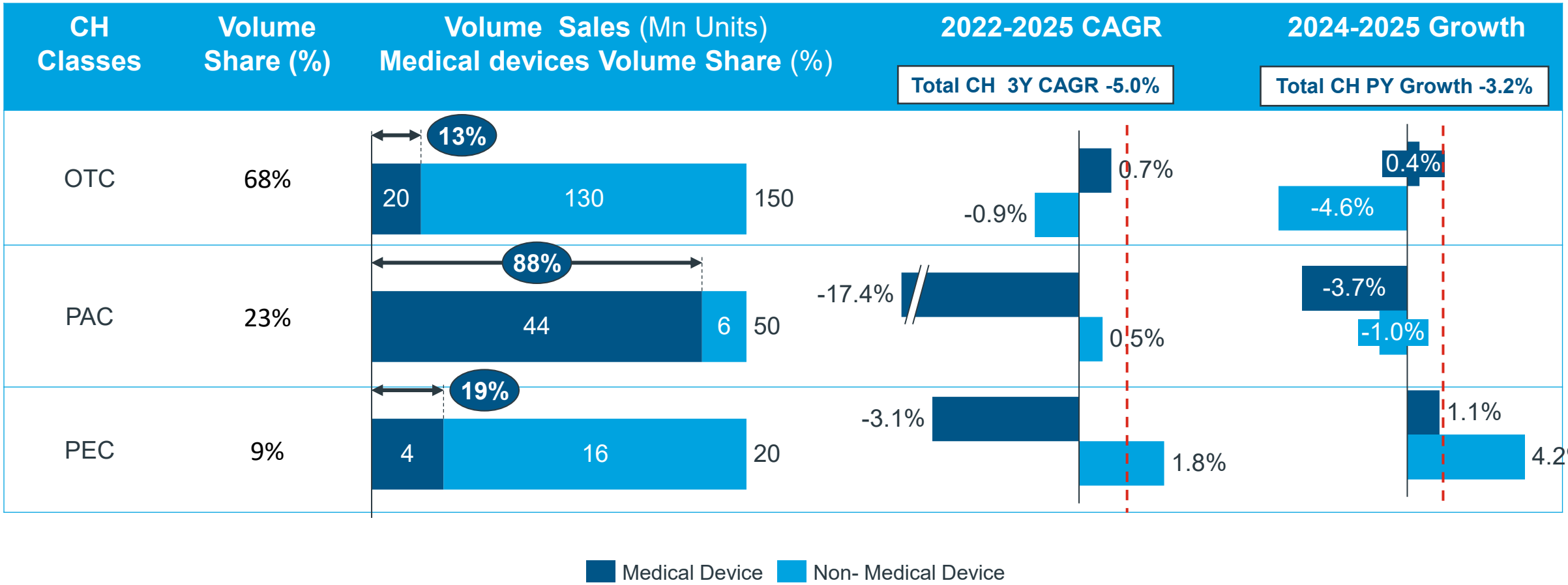
Belgium CH Performance by Classes

Patient Care leads in medical device volume sales with 44 Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Belgium Medical Devices Packs & New Launches

The majority of Medical devices new launches came from Patient Care category in last three years

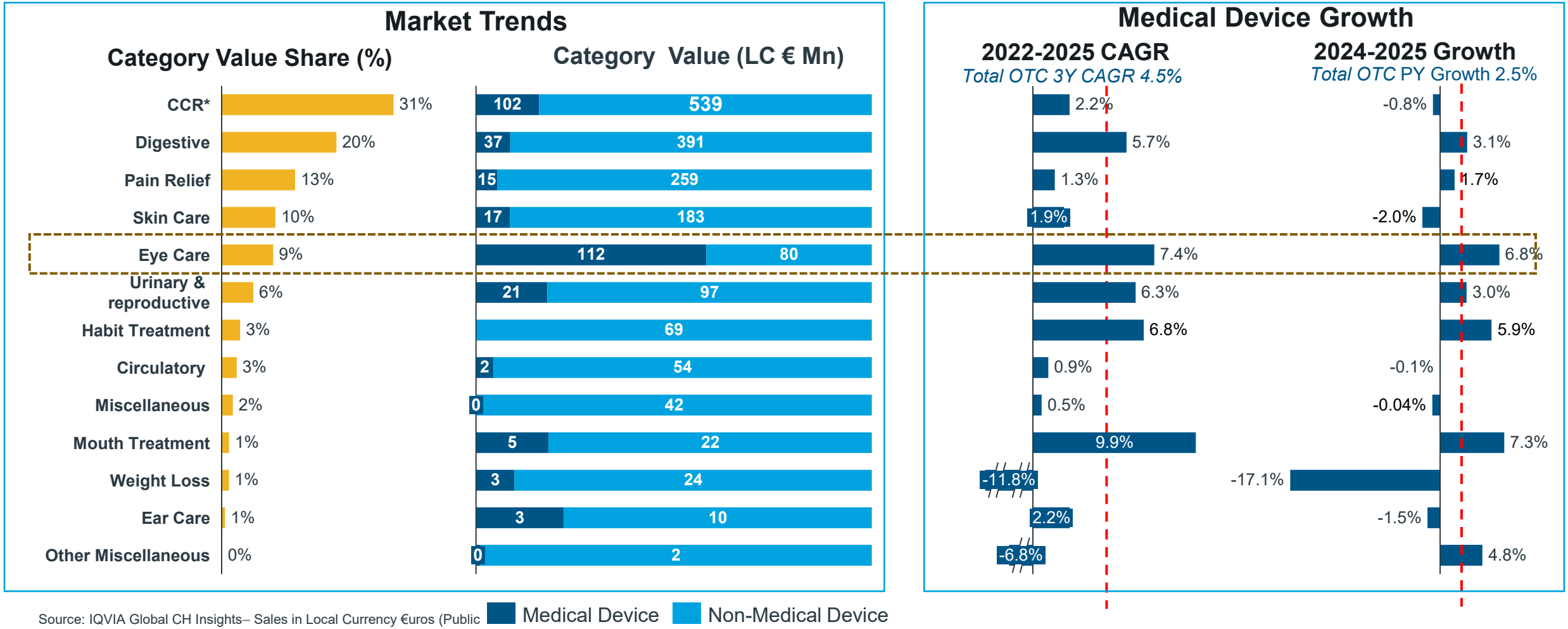
Category	Total Packs*			New Launches**		
CH Total	17,120	17,904	**35,024**	3,670	4,160	**7,830**
OTC	898	6,298	**7,196**	174	1,466	**1,640**
Patient Care	16,004	6,448	**22,452**	3,444	1,463	**4,907**
Personal Care	218	5,158	**5,376**	52	1,231	**1,283**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Belgium OTC Performance by CHC 1 Category in 2025

*Eyecare represents the largest value share under medical devices; valued at **€112 Mn***

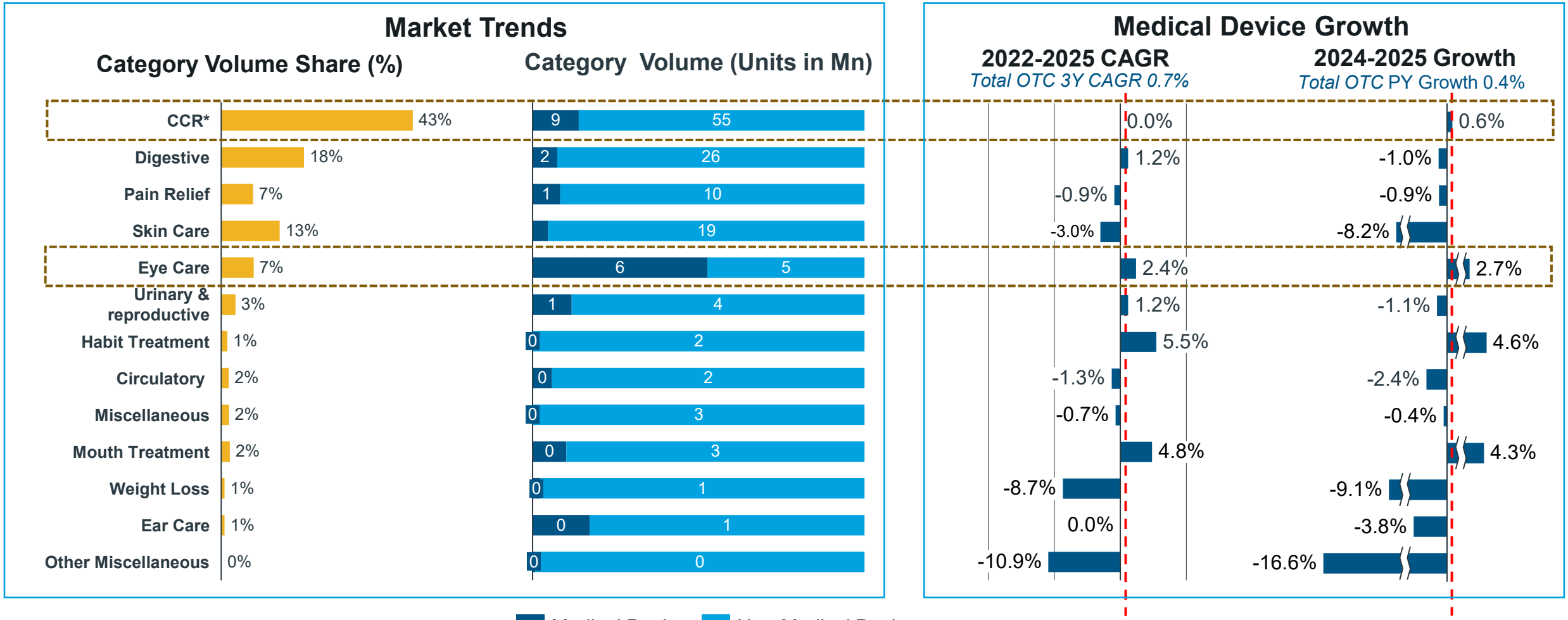


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Belgium OTC Performance by CHC 1 Category in 2025

CCR leads in medical devices volume sales followed by Eye care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products
Categories with <1% share such as Ear care and Habit treatment are excluded

Belgium Medical Devices Performance by top CHC 2 Segments

The top 6 categories represent > 95% of the values, leading with Eye Care

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC-Medical device		**316.8**	
Eye Care	35%	111.6	Not available
CCR	32%	102.1	Nasal Saline 79.2; Cough 15.2; Cold Remedies 4.9; Sore Throat 1.4
Digestive	12%	37.0	Antidiarrhoeals 17.3; Laxatives 7.7; Digestive 6.4; Acid & Heartburn 5.5
Urinary & Reproductive	7%	21.3	Urinary Condition 18.4; Gynaecological 2.4; Urology 0.5; Male Condition
Skin care	5%	17.1	Wart/Corn Removal 5.3; Antifungals 4.2; Wound Healing; Hand Skin 3.7; Wound Disinfect 1.4
Pain Relief	5%	14.9	Muscular Pain 12.0; Mouth Pain 2.8; Joint Care 0.2; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights – Sales in Local Currency €uros, based on MAT Q2 2025

*Top 6 categories based on their Medical devices value sales (in descending order)

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Belgium Medical Devices Performance by top CHC 2 Segments

Mouth treatment and Circulatory products represent a minor portion of the total value

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	2%	5.0	Other Mouth Treatment 4.8; Mouth Infection 0.0; Fluoride Products 0.2
Ear Care	1%	2.7	Not available
Weight Loss	1%	2.6	Not available
Circulatory	1%	2.5	Antihemorrhoids 2.3; Chloesterol Regulating 0.0; Other Circulatory 0.1
Miscellaneous	0%	0.0	Not Available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Belgium Medical Devices Performance by top CHC 2 Segments

Nasal saline under CCR leads in terms of volume

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC-Medical device		**19.8**	
Eye Care	29%	5.7	Not available
CCR	45%	8.9	Nasal Saline 26.1; Sore Throat 21.4; Cough 8.7; Other Respiratory 1.9
Digestive	10%	2.1	Digestive 7.6; Laxatives 6.5; Acid & Heartburn 2.5; Antidiarrhoeals 0.2
Urinary & Reproductive	3%	0.6	Wound Healing 5.6; Wart/Corn Removal 1.5; Hand Skin Wound Disinfect 1.4; Scar & Keloid 0.7
Skin Care	5%	0.9	Muscular Pain 8.2; Mouth Pain 0.5; Dysmenorrhea 0.2
Pain Relief	4%	0.9	Urinary Condition 2.9; Gynaecological 2.9; Urology 0.1; Male Condition

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Belgium Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products lead to a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	1%	0.3	Other Mouth Treatment 0.3; Mouth Infection 0.0; Fluoride Products 0.0
Ear Care	1%	0.2	Not available
Weight Loss	0.1%	0	Not available
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Miscellaneous	0%	0	Not available
Other Miscellaneous	0%	0	Not available
Habit Treatment	0%	0	Smoking control 0.0; Nail Biting 0.0; Other Habit 0.0

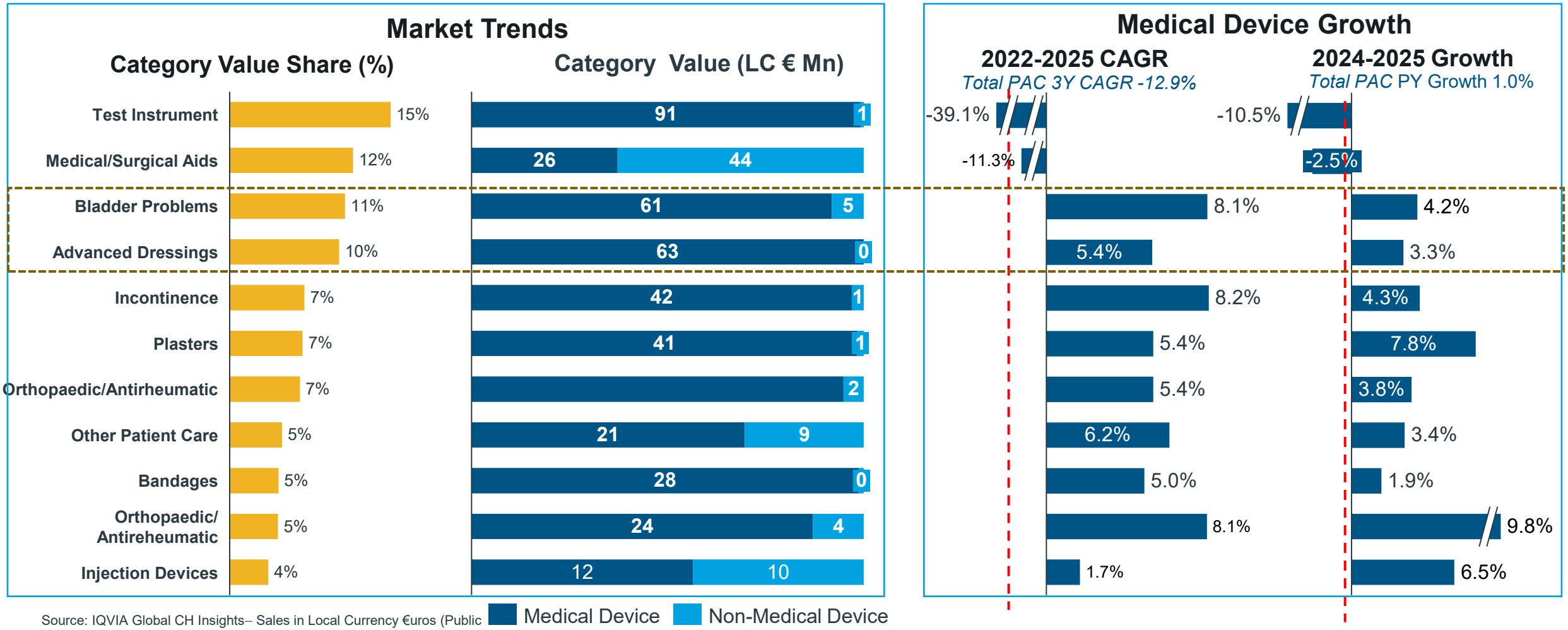
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Belgium PAC Performance by CHC 1 Category in 2025 (1/2)

While Test Instruments contribute to highest value, other categories in PAC offer L-T and S-T gains

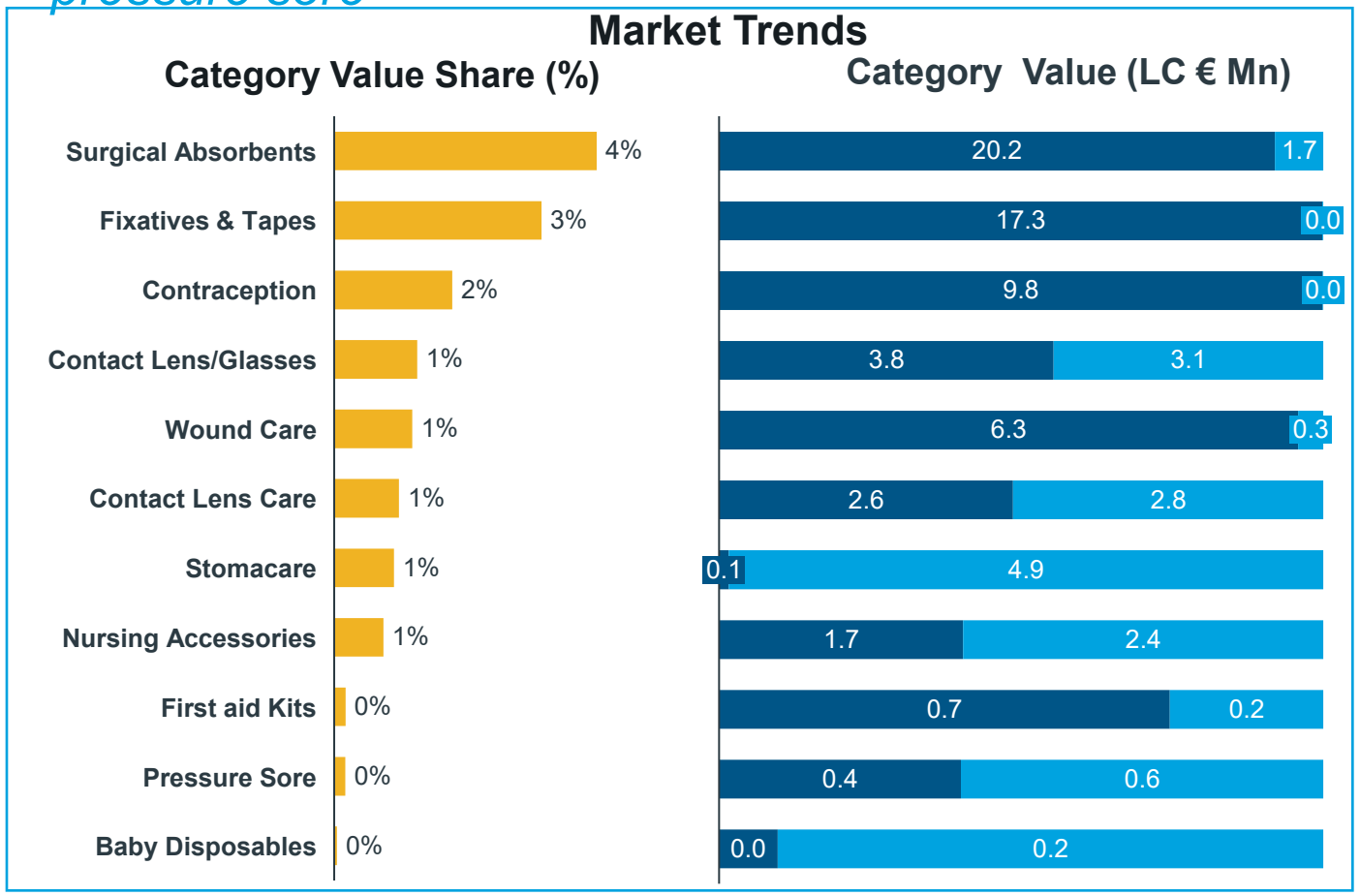


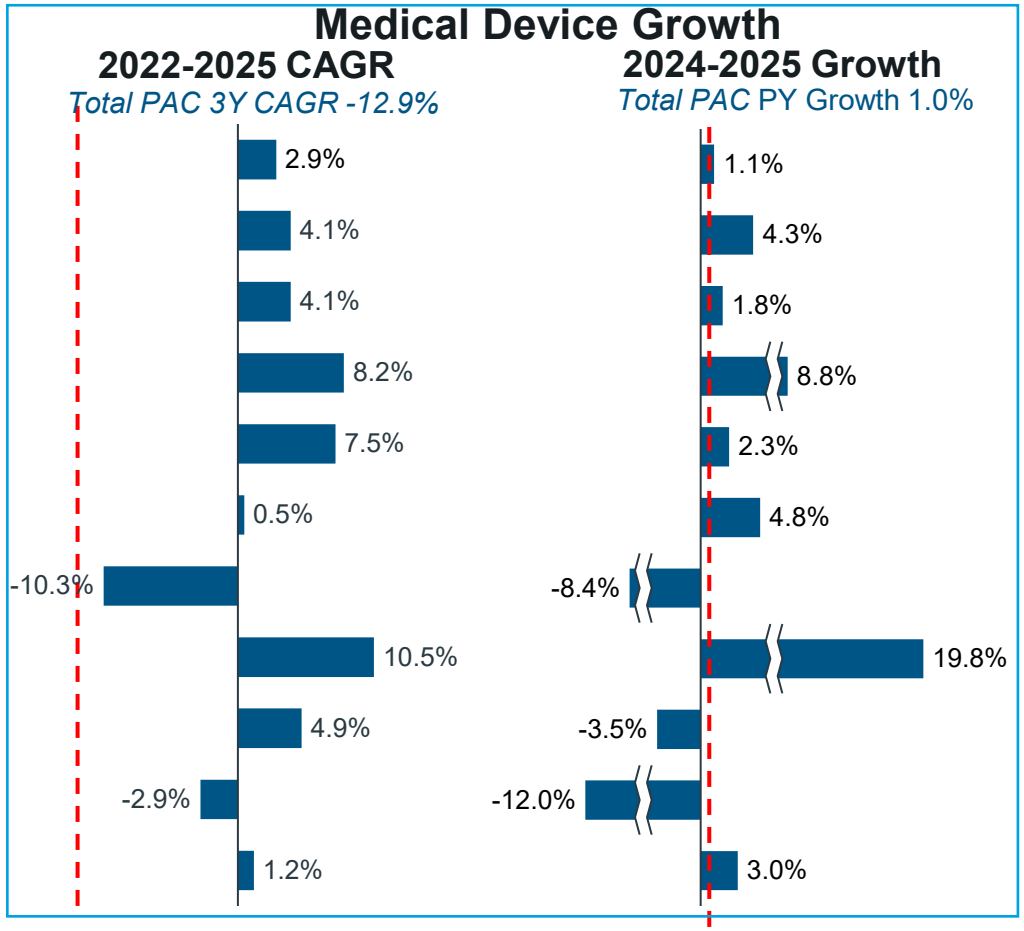
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Belgium PAC Performance by CHC 1 Category in 2025 (2/2)

Medical devices experienced favorable growth in most categories except few like stomacare and pressure sore



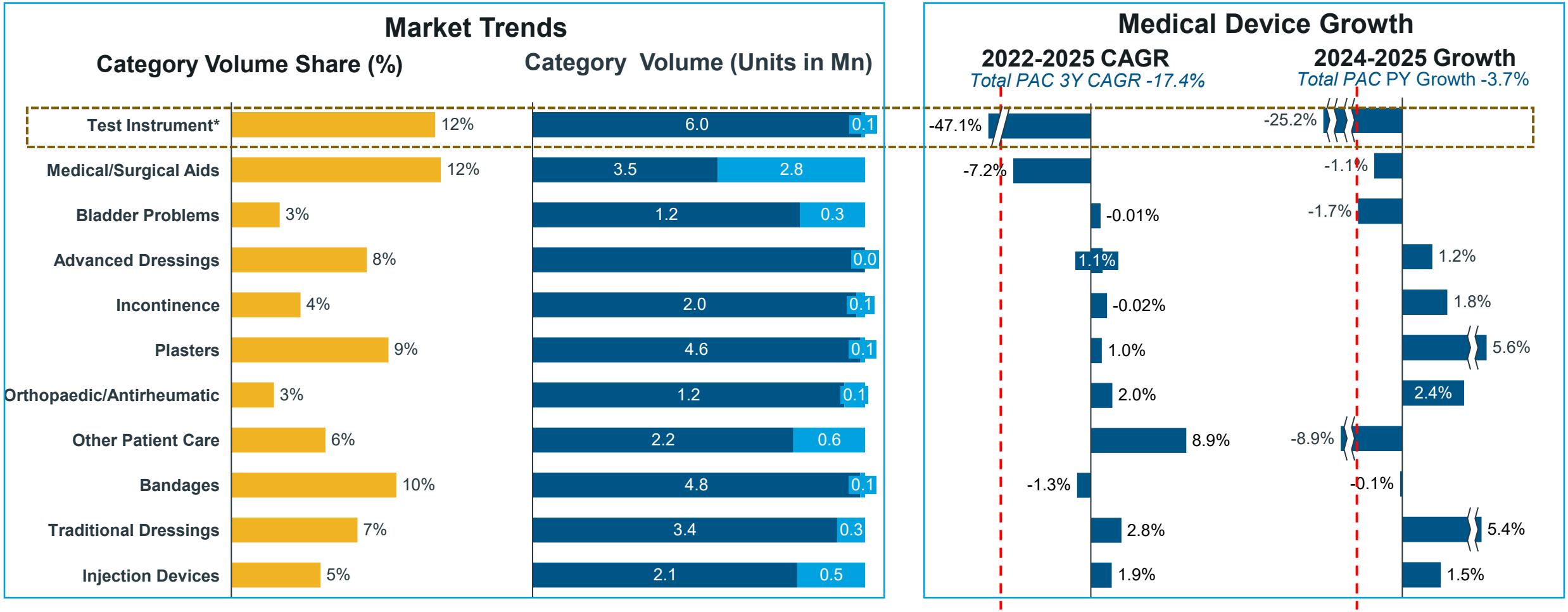


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Belgium PAC Performance by CHC 1 Category (1/2)

Test instruments and medical/ surgical aids dominate in terms of volume

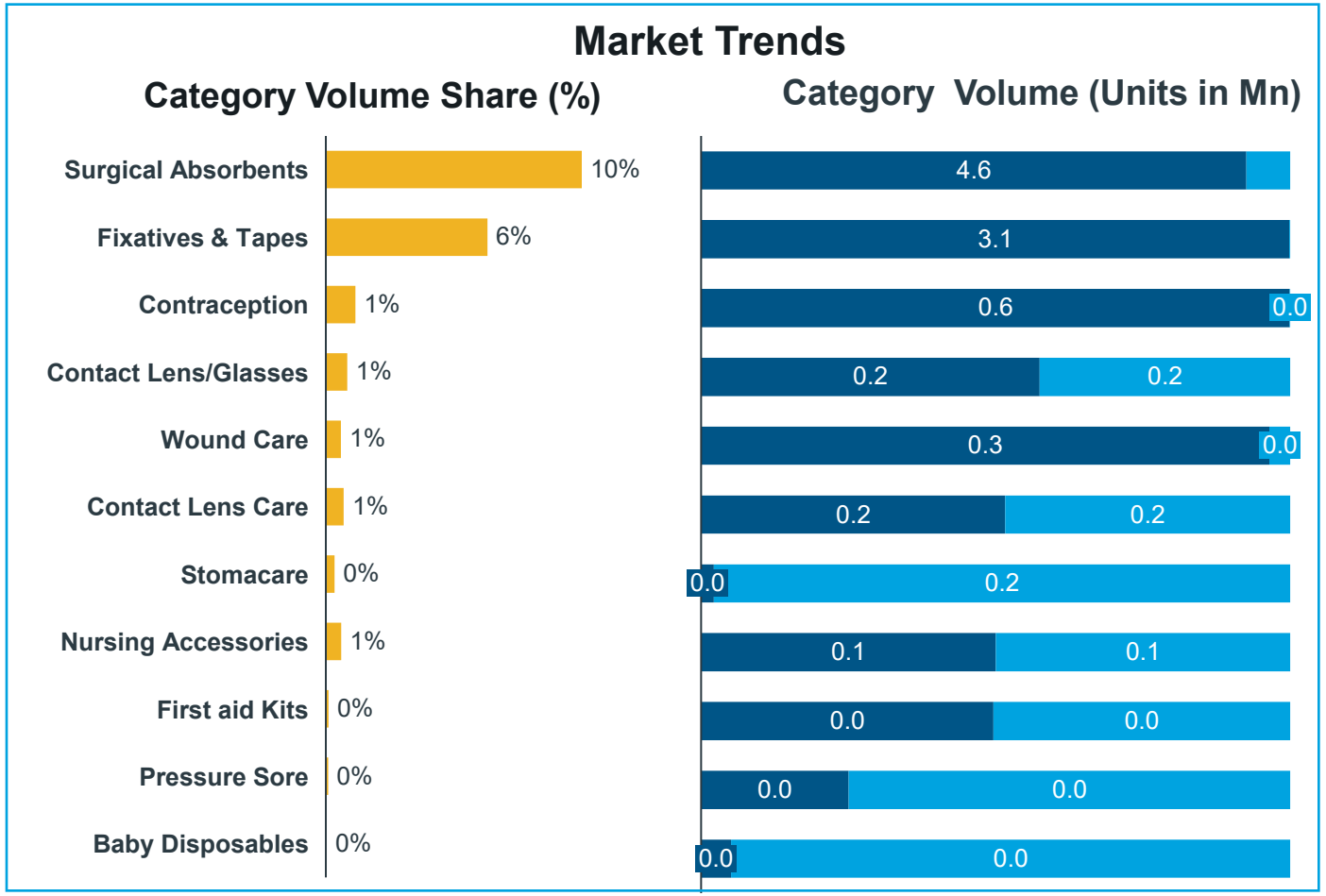


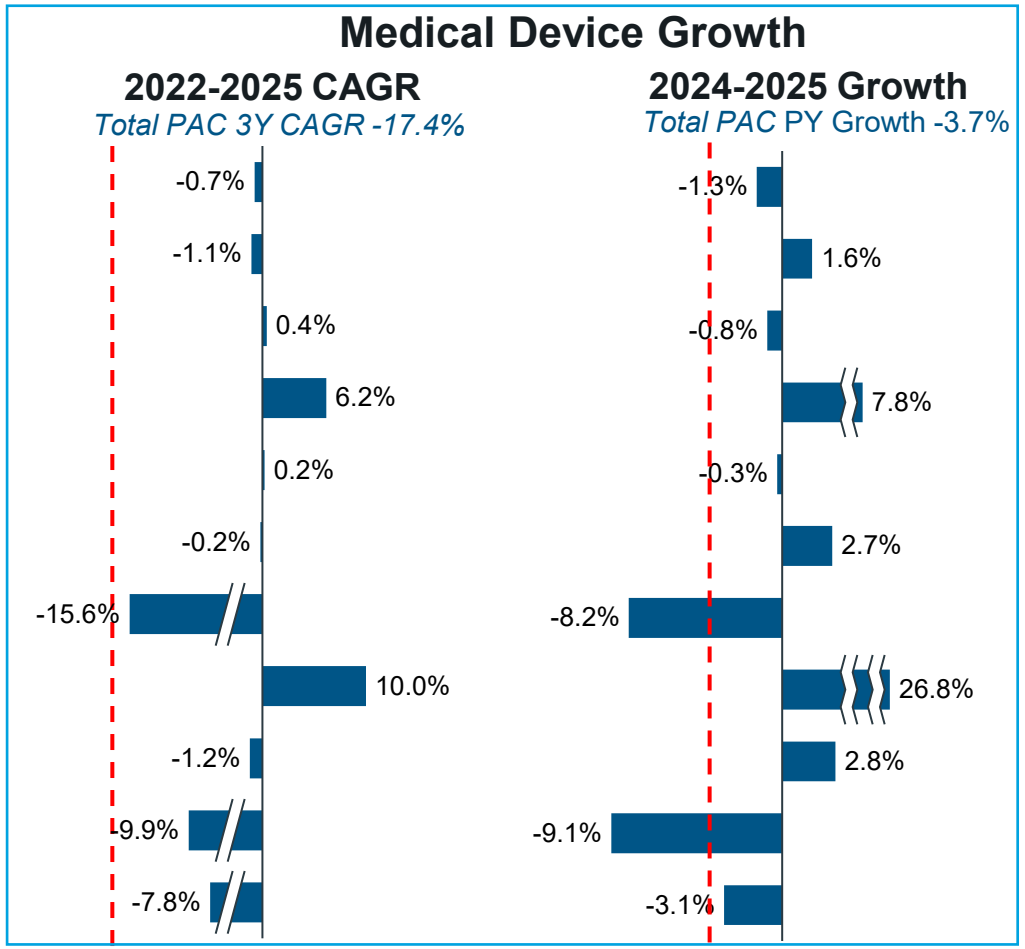
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Belgium PAC Performance by CHC 1 Category (2/2)

Sales of categories like Stomacare and pressure sore have been declining in growth





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Belgium Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~65% of values; dominated by Glucose measuring in Test Instrument

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC-Medical Devices		**509.6**	
Test Instrument	18%	91.4	Gluc Measuring 39.1; Blood Press Monitors 13.0; Coronavirus Test 11.5; Pregnancy Test 11.1
Advanced Dressings	12%	62.6	Base Tech 42.8; Anti-Infection 19.7; Hyaluron 0.1; Other 0.0
Bladder Problems	12%	60.6	Urethral Catheters 59.2; Other Bladder Problems 1.3; Drainage Bags & Cover 0.1; Urinary Sheaths & Access. 0.0
Incontinence	8%	41.5	Mod Heav Sev Incont. 26.7; Light Incontinence 12.3; Bed Sheets/Pads 1.3; Other Incontinence Prds 1.1
Plasters	8%	41.1	Special Plaster 21.5; Plaster Strip 13.1; Liquid Plaster 4.8; Plaster Spec. Uses 1.6
Orthopaedic/ Antirheumatic	7%	38.2	Belts Other Supp 17.0; Curativ/Elastic Stocking 13.3; Clogs+Orthopaedic Footwear 3.5; Corsets 2.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Belgium Medical Devices Performance by top CHC 2 Segments

Test instruments and advanced dressings lead in sales volume

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC-Medical Devices		**44.2**	
Test Instruments	14%	6.0	Coronavirus Test 2.3; Gluc Measuring 1.6; Pregnancy Test 1.0; Thermometers 0.6
Advanced Dressings	9%	4.0	Base Tech 3.3; Anti-Infection 0.7; Hyaluron 0.0; Other 0.0
Bladder Problems	3%	1.2	Urethral Catheters 1.0; Drainage Bags & Cover 0.1; Other Bladder Problems 0.1; Urinary Sheaths & Access. 0.0
Incontinence	5%	2.0	Light Incontinence 1.1; Mod Heav Sev Incont. 0.9; Bed Sheets/Pads 0.0; Other Incontinence Prds 0.0
Plasters	10%	4.6	Plaster Strip 2.3; Special Plaster 1.8; Liquid Plaster 0.3; Plaster Spec. Uses 0.2
Orthopaedic/ Antirheumatic	3%	1.2	Belts Other Supp 0.5; Curativ/Elastic Stocking 0.4; Clogs+Orthopaedic Footwear 0.2; Equiment for Disabled 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

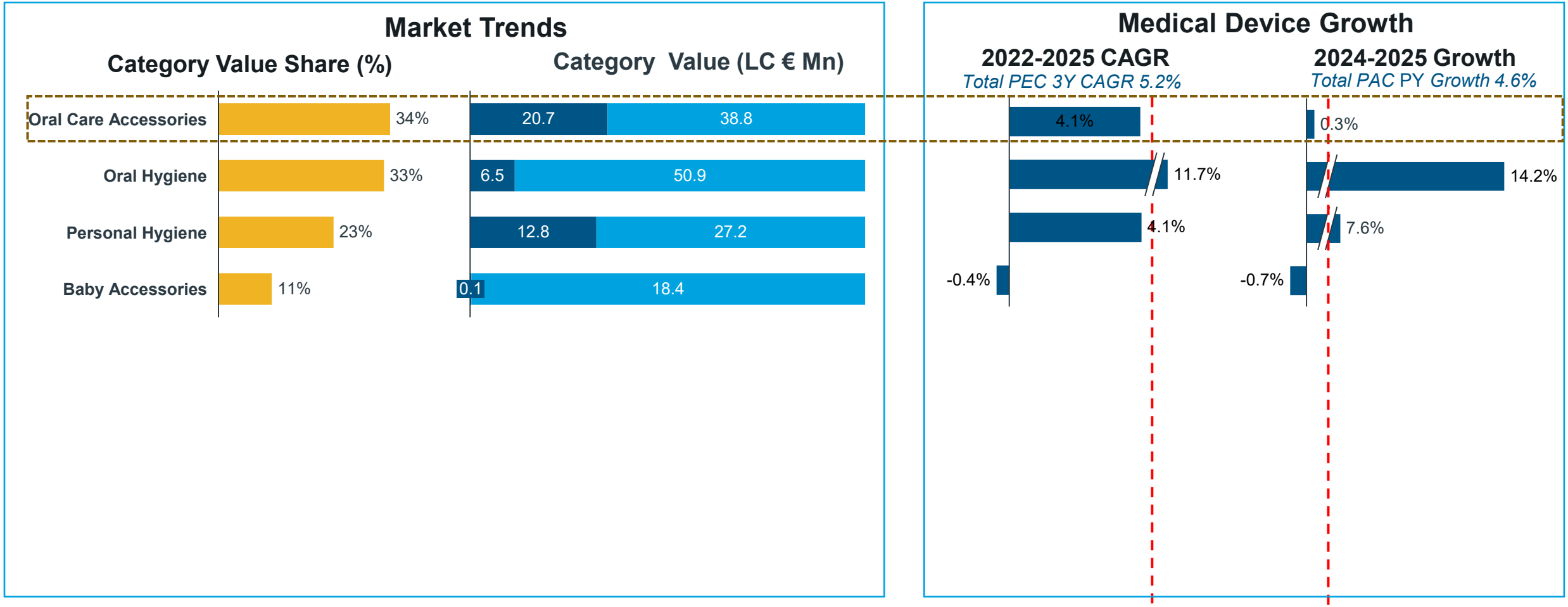
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Belgium PEC Performance by CHC 1 Category

All categories of PEC except baby accessories record strong both L-T and S-T

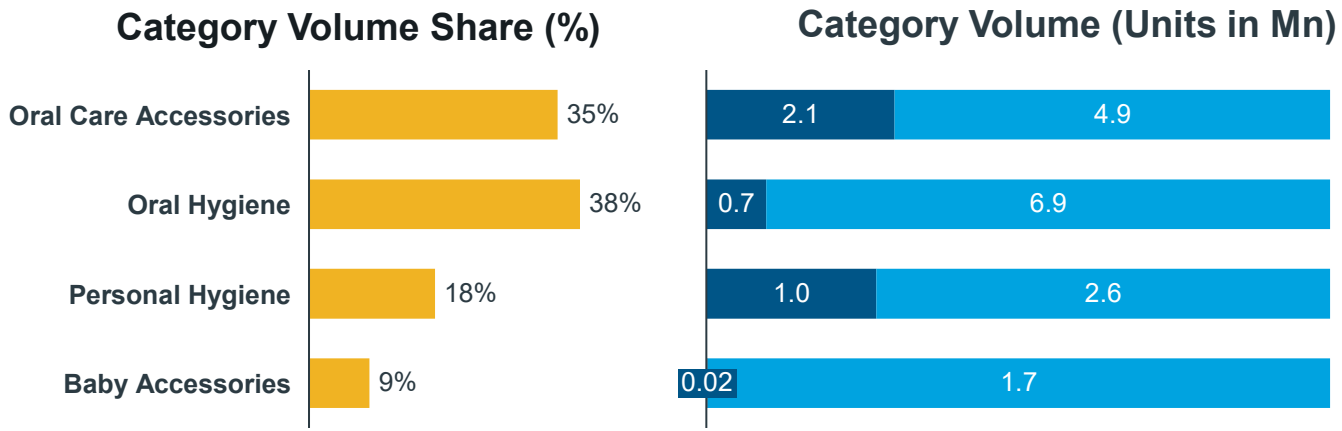


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

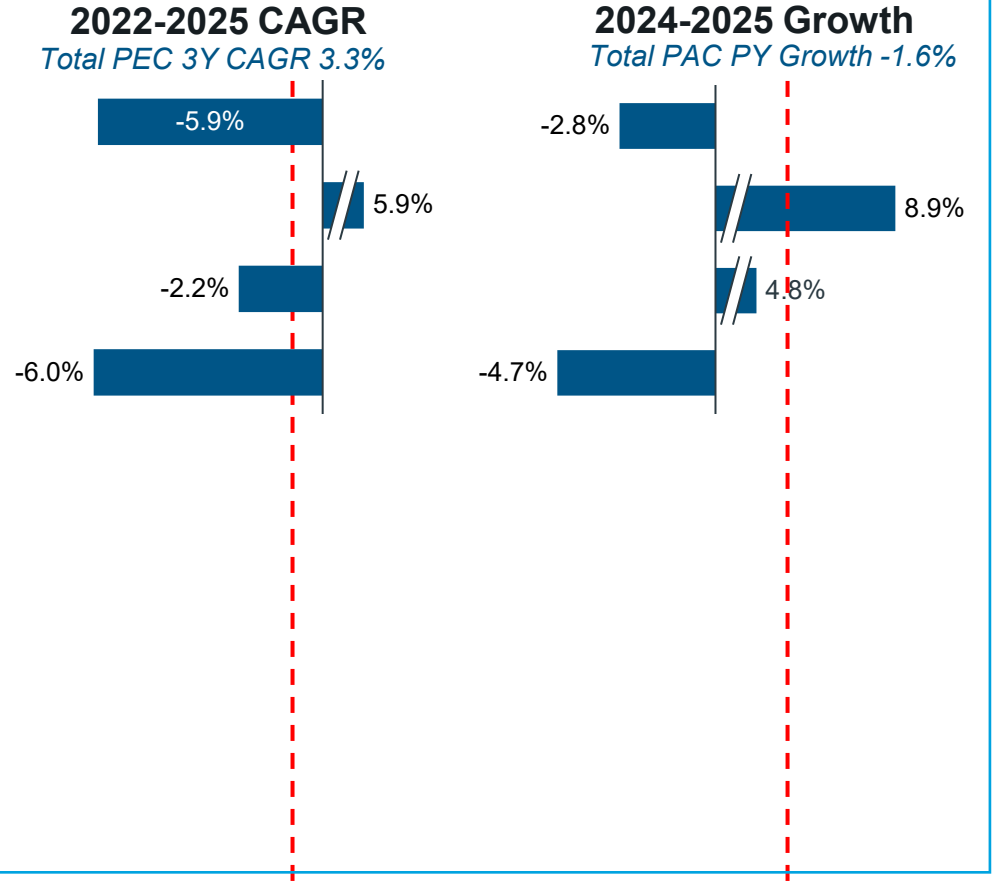
Belgium PEC Performance by CHC 1 Category

Oral care accessories hold the major share; while oral hygiene leads in volumes in both L-T and S-T

OTC Market Trends



Medical Device Growth



Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Belgium Medical Devices Performance by top CHC 2 Segments

Denture products in oral care accessories account for ~52% of medical device value shares

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC-Medical Devices		**40.0**	
Oral Care Accessories	52%	20.7	Denture Products 20.4; Toothbrushes 0.2; Dental Floss 0.1; Dental Sticks 0.0
Personal Hygiene	32%	12.8	Intimate Hygiene 11.4; Hand Hygeine w/o Soap 1.3; Foot Hygiene 0.0
Oral Hygiene	16%	6.5	Toothpastes 6.4; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0.2%	0.1	Feeding Bottles &Acces. 0.1; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Belgium Medical Devices Performance by top CHC 2 Segments

Denture products in oral care accessories continues to lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC-Medical Devices		**3.8**	
Oral Care Accessories	55%	2.1	Denture Products 2.1; Toothbrushes 0.0; Dental Floss 0.0; Dental Sticks 0.0
Personal Hygiene	25%	1.0	Intimate Hygiene 0.7; Hand Hygeine w/o Soap 0.3; Foot Hygiene 0.0
Oral Hygiene	19%	0.7	Toothpastes 0.7; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0.1%	0.0	Feeding Bottles &Acces. 0.02; Dummies/Pacifiers/Teeth 5.3%

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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UK Medical Devices – Market Dynamics

UK Medical Devices Performance Overview

Medical device segment is valued at €0.65 Bn in 2025; growing at a value of 4.4% L-T

25%

Medical device share of total CH value in 2025

Long –term Growth

4.4% by value

0.4% by volume

Short –term Growth

6.2% by value

1.6% by volume

Medical Devices – €651 Mn (2025)

100% OTC value share

Long-term Growth (Value)

4.4% OTC

#PEC and PAC data not covered in UK

Medical Devices Categories

Digestive

36% *Share for total OTC value in 2025; Dominated by **Laxatives***

Long-term Growth

8.9% by value

OTC (Over-the-Counter)

17%

Contribution to total new pack launches in last 3 years

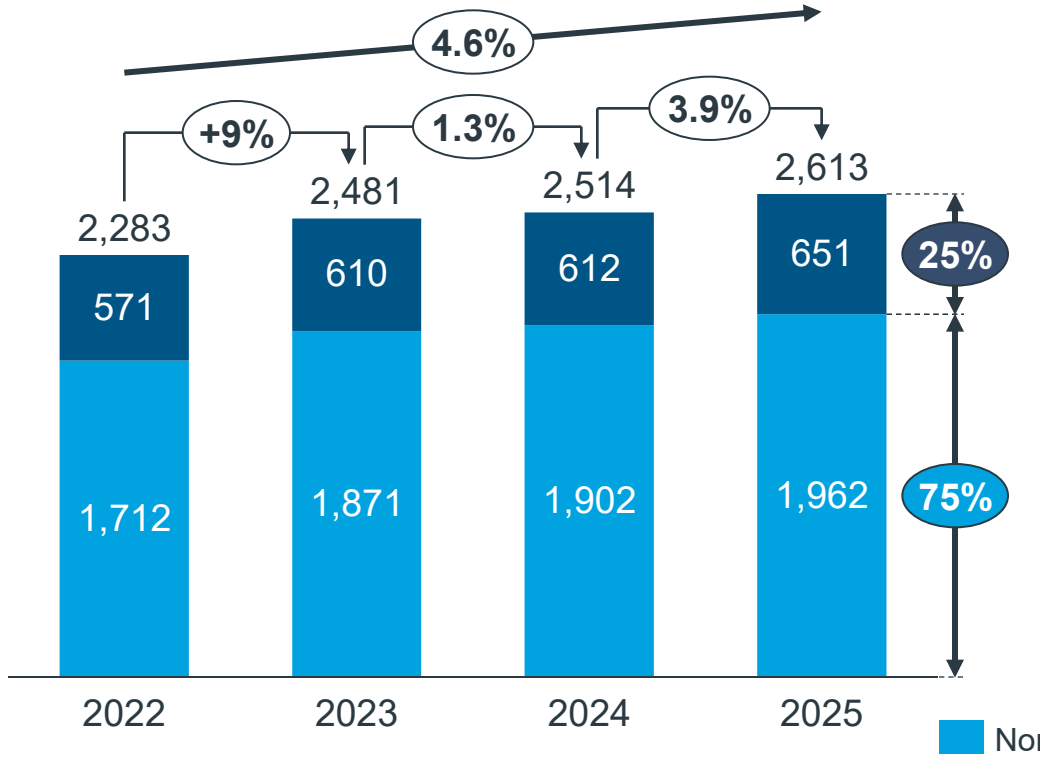
Medical Devices Innovation

Source: IQVIA Global CH Insights - MAT Q2 2025

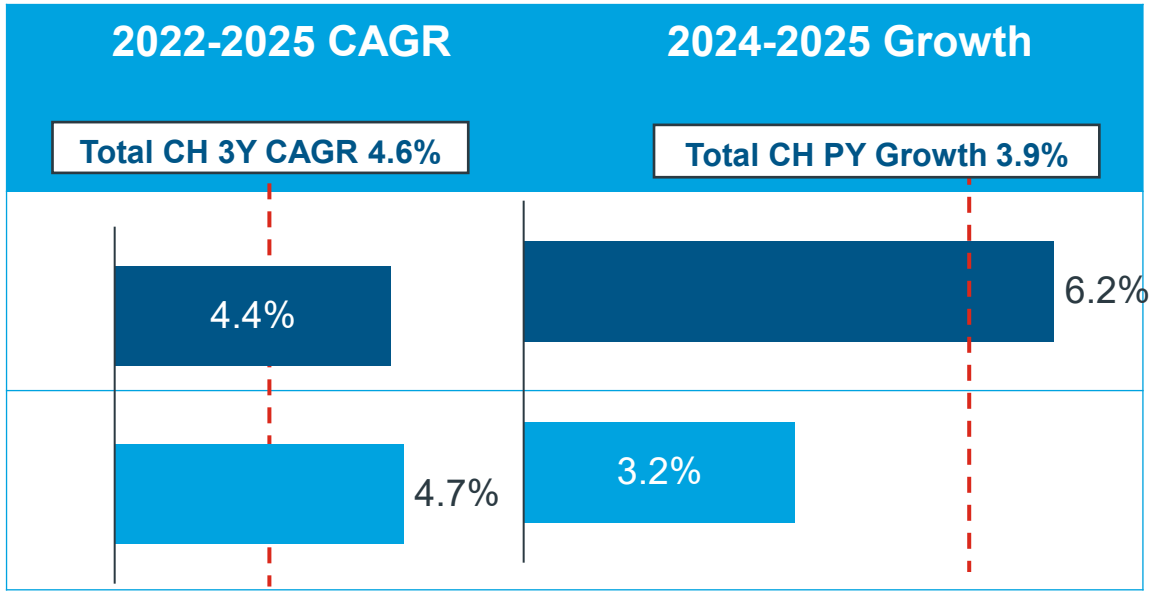
UK CH Market Size & Growth

The CH market has grown at 4.6% between 2022 and 2025, with the medical devices segment reaching a value of €651 Mn in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

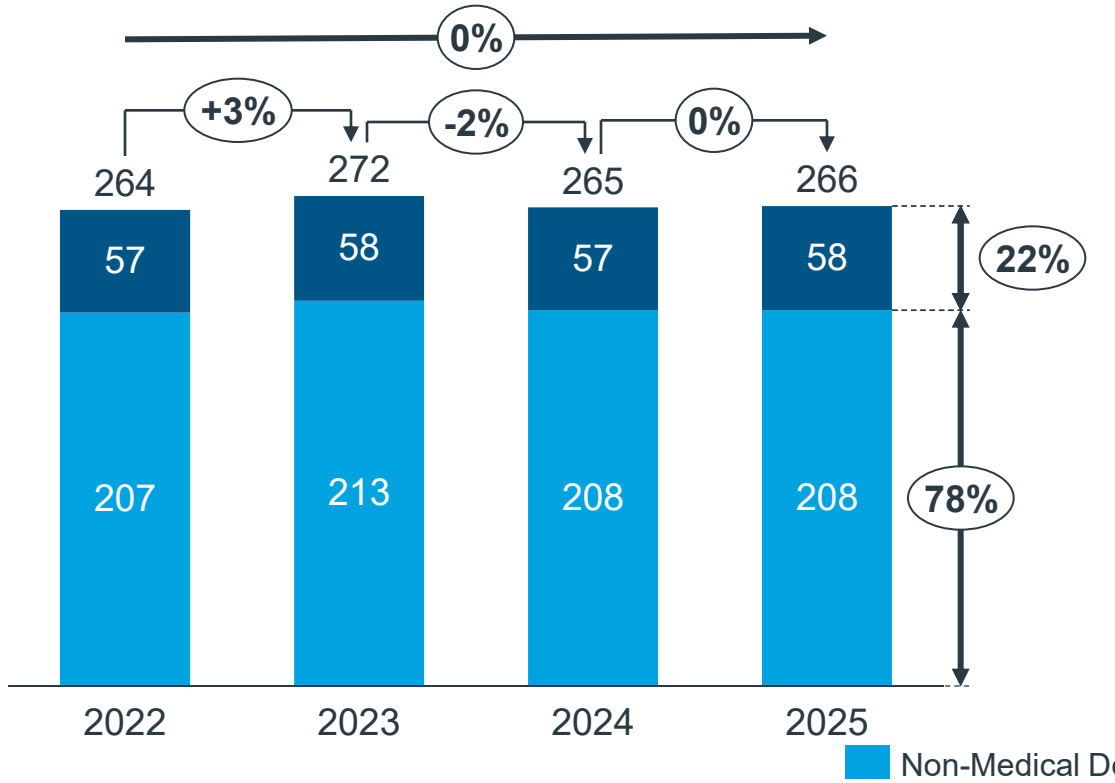


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

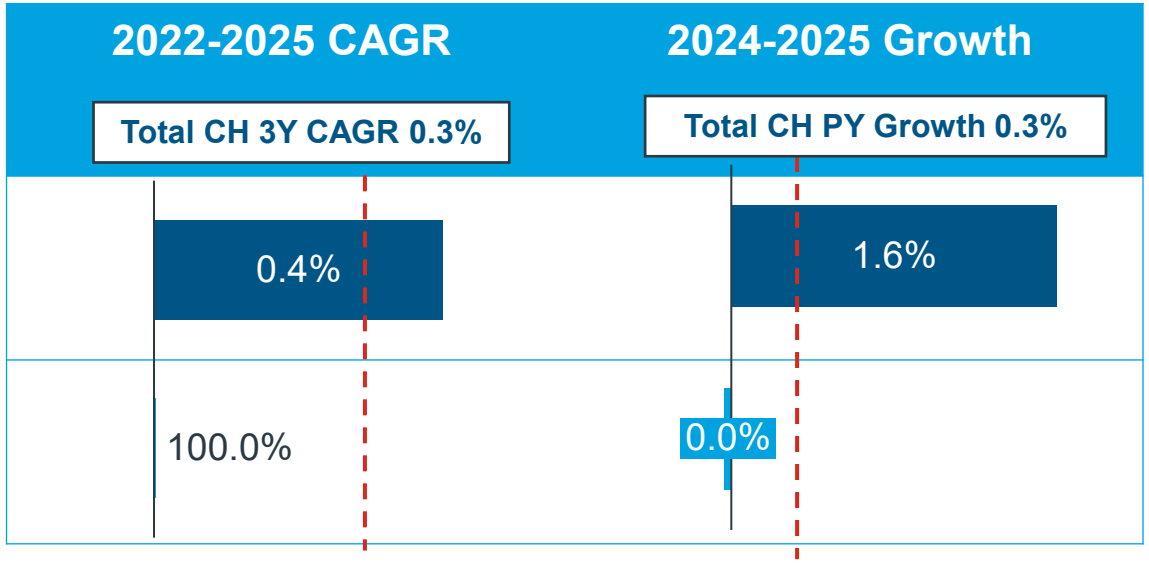
UK CH Market Volume & Growth

Medical devices account for 22% of the CH market volume, with a L-T growth of 0.4% while the overall market has shown a flat trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

UK CH Performance by Classes

Medical devices records a growth in both the S-T and L-T

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR Total CH 3Y CAGR 4.6%	2024-2025 Growth Total CH PY Growth 3.9%
OTC	100%	651 / 1,962 / 2,613	4.4% / 4.7%	6.2% / 3.2%

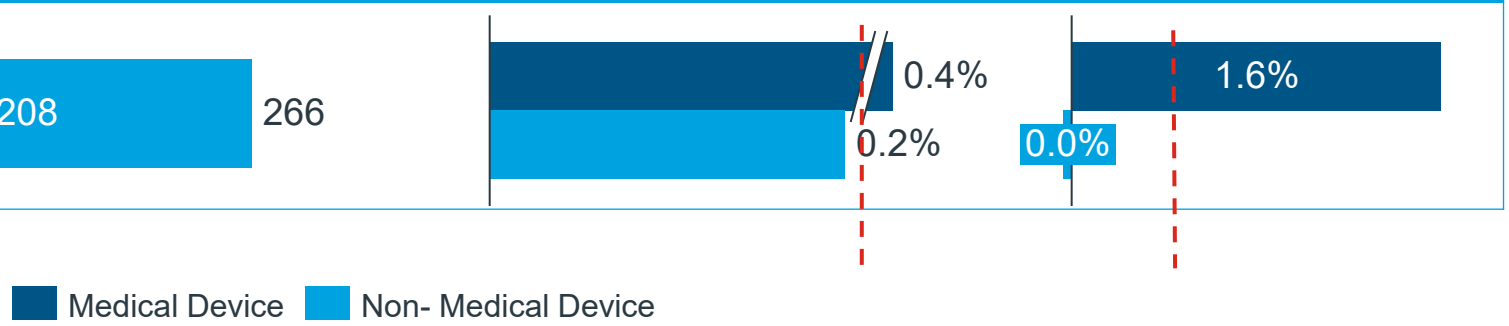
Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

UK CH Performance by Classes

Volumes are lower than the value growth both in S-T and L-T

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
OTC	100%	58 / 208 / 266	0.4% / 0.2%	1.6% / 0.0%



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

UK Medical Devices Packs & New Launches

Medical devices new launches account for 17% of the overall launches over the past 3 years

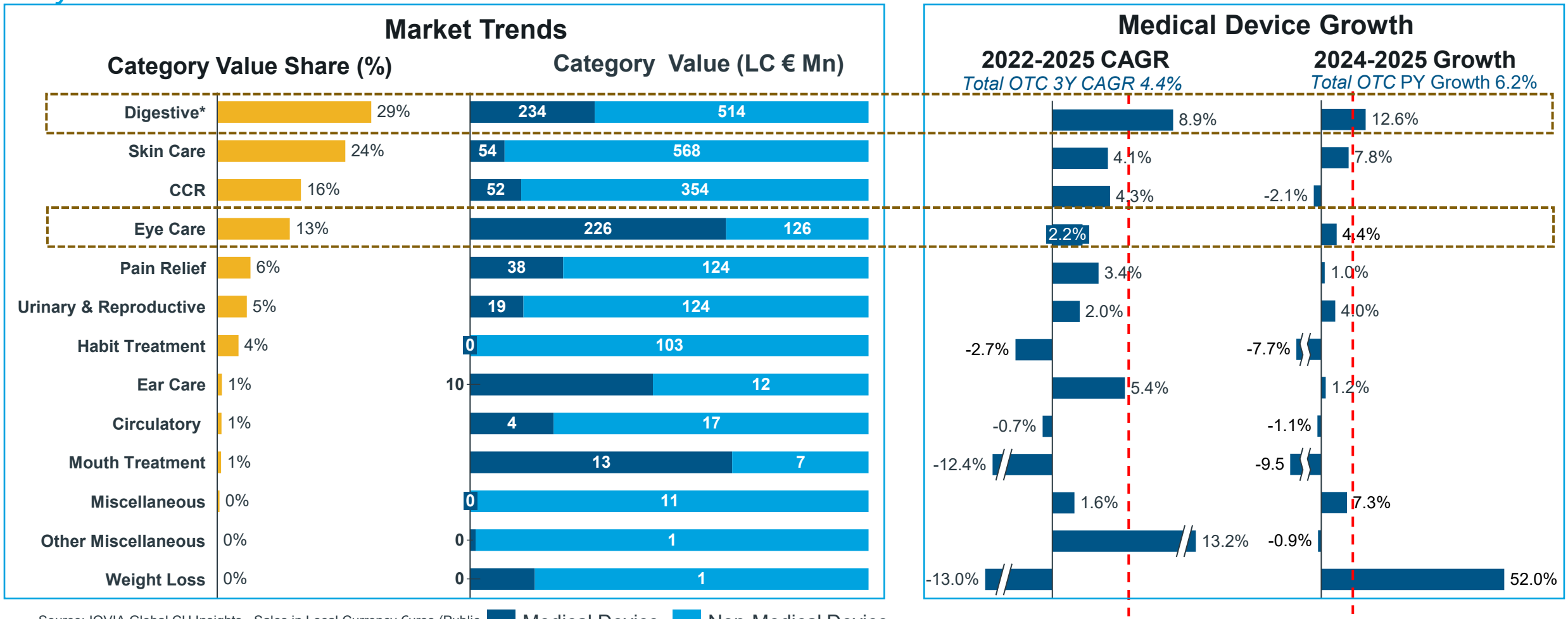
Category	Total Packs*			New Launches**		
CH Total	411	2,040	**2,451**	83	414	**497**
OTC	411	2,040	**2,451**	83	414	**497**

Medical Device Non Medical Device Medical Device Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

UK OTC Performance by CHC 1 Category in 2025

*Digestive contributes to the highest value under medical devices segment at **€234 Mn,** followed by Eye care at **€226 Mn***

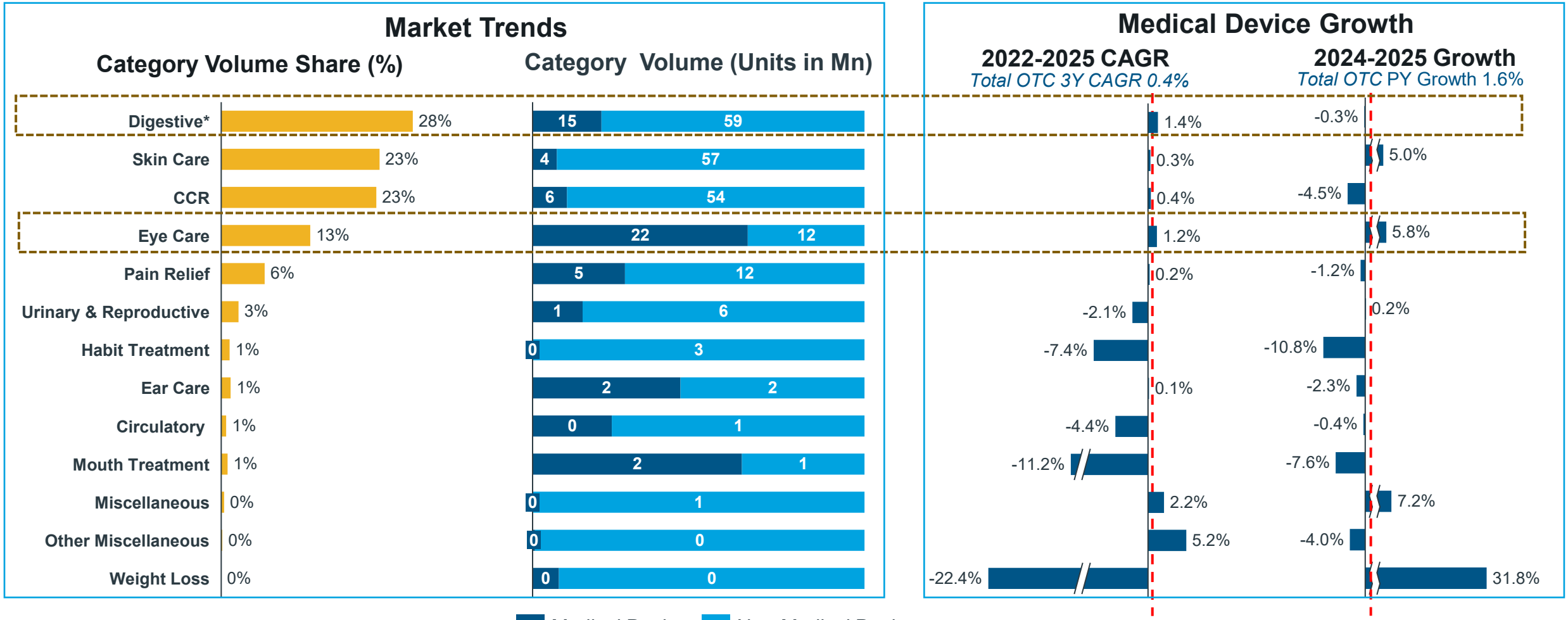


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

UK OTC Performance by CHC 1 Category in 2025

Eye care holds the largest volume share in the medical devices category with 22 Mn unit sales



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

UK Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Digestive with 36% value share, followed by Eyecare

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**650.6**	
Digestive	36%	233.9	Laxatives 124.8; Acid & Heartburn 83.7; Digestive 16.4; Antidiarrhoeals 9.0
Eye Care	35%	226.3	Not available
Skin Care	8%	53.8	Skin Protector/Emollients 25.7; Psoriasis 6.6; Wart/Corn Removal 5.4; Skin Irritation 5.0
CCR	8%	52.1	Nasal Saline 23.8; Cough 13.2; Sore Throat 6.5; Cold Remedies 5.6
Pain relief	5%	37.7	Mouth Pain 20.1; Muscular Pain 17.5; Other Pain Relief 0.0; Dysmenorrhea 0.0
Urinary & Reproductive	3%	19.2	Gynaecological 15.1; Urology Male Condition 2.6; Urinary Condition 1.5

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

UK Medical Devices Performance by top CHC 2 Segments

Mouth treatment, circulatory and habit treatment products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	2%	12.7	Other Mouth Treatment 7.8; Mouth Infection 4.9; Fluoride Products 0.0
Ear Care	2%	10.2	Not available
Circulatory	1%	4.4	Antihemorrhoids 4.0; Chloesterol Regulating 0.4; Other Circulatory 0.0
Weight Loss	0%	0.2	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

UK Medical Devices Performance by top CHC 2 Segments

Eyecare leads in highest volume share

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**57.7**	
Digestive	27%	15.4	Laxatives 8.1; Acid & Heartburn 5.3; Antidiarrhoeals 1.4; Digestive 0.6
Eye Care	39%	22.3	Not available
Skin Care	8%	4.5	Skin Protector/Emollients 1.8; Antifungals 0.6; Wart/Corn Removal 0.5; Hand Skin Wound Disinfect 0.4
CCR	11%	6.2	Nasal Saline 1.7; Cough 2.6; Sore Throat 0.9; Cold Remedies 0.5
Pain relief	8%	4.7	Mouth Pain 2.8; Muscular Pain 1.9; Other Pain Relief 0.0; Dysmenorrhea 0.0
Urinary & Reproductive	2%	1.0	Gynaecological 0.8; Urology Male Condition 0.1; Urinary Condition 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

UK Medical Devices Performance by top CHC 2 Segments

Mouth treatment, circulatory and habit treatment products account for a small share in volumes too

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	3%	1.6	Other Mouth Treatment 0.8; Mouth Infection 0.8; Fluoride Products 0.0
Ear Care	3%	1.6	Not available
Circulatory	1%	0.5	Antihemorrhoids 0.4; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

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Portugal Medical Devices – Market Dynamics

Portugal Medical Devices Performance Overview

Medical devices segment is valued at €0.53 Bn, with strong value growth in the recent year

37%

Medical device share of total CH value in 2025

Long –term Growth

-1.4% by value

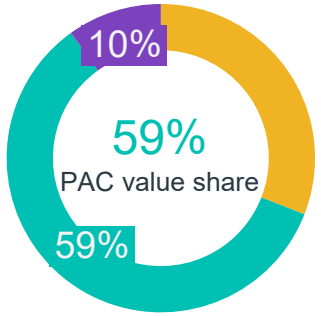
- 18.1% by

Short –term Growth

6.5% by value

-2.6% by volume

Medical Devices – €529 Mn (2025)



Long-term Growth (Value)

-6.2% PAC

7.4% OTC

8.8% PEC

Medical Devices Categories

44%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **91%** of new pack launches

Medical Devices Innovation

Test Instruments

51% Share of total PAC values in 2025; Dominated by **Gluc measuring**

Long-term Growth

-13.6% by value

PAC (Patient care)

CCR

28% *Share for total OTC value in 2025, Dominated by Nasal Saline*

Long-term Growth

4.8% by value

OTC (Over-the-Counter)

Oral Care Accessories

45% *Share of total PEC value share in 2022; Dominated by **Denture products***

Long term Growth

7.3% by value

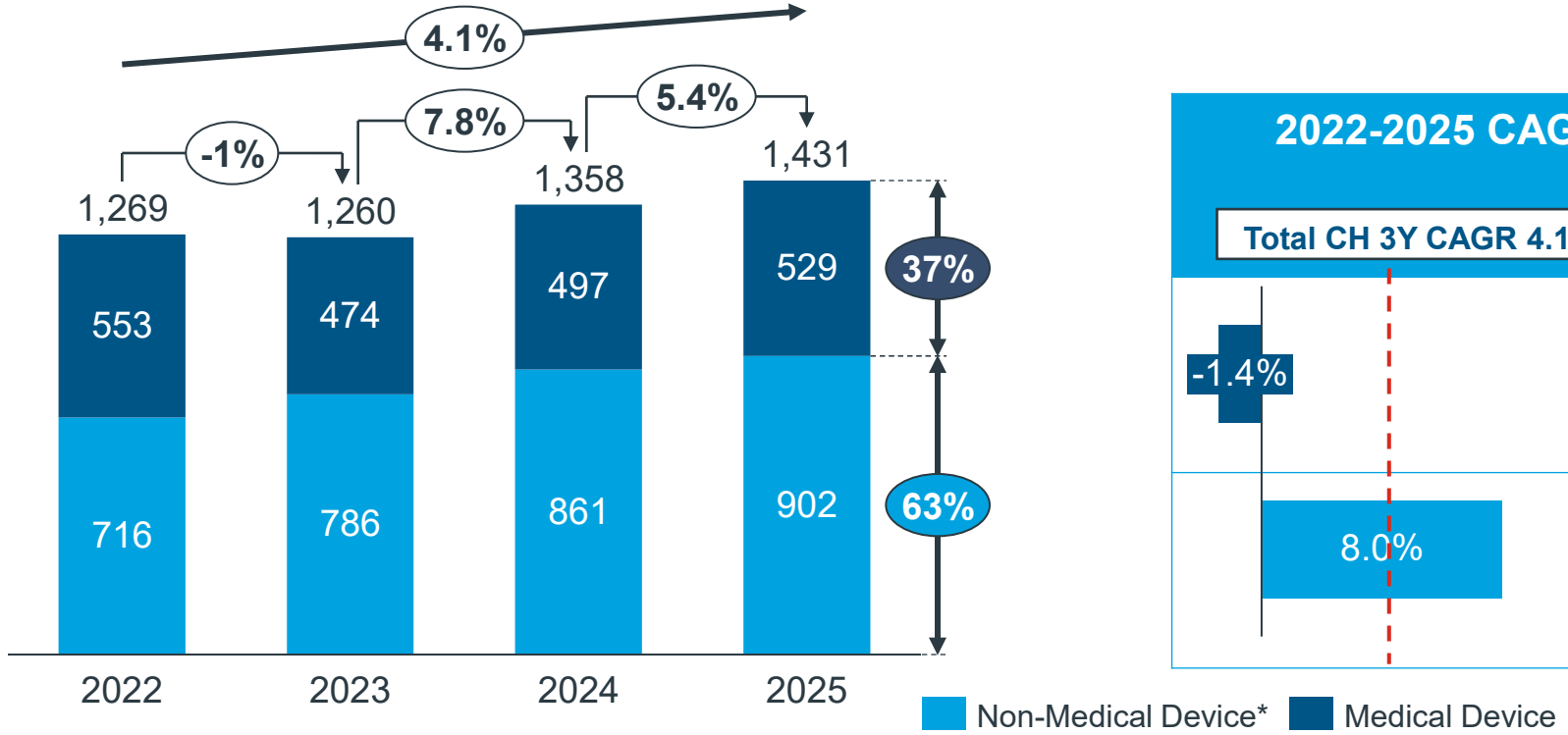
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

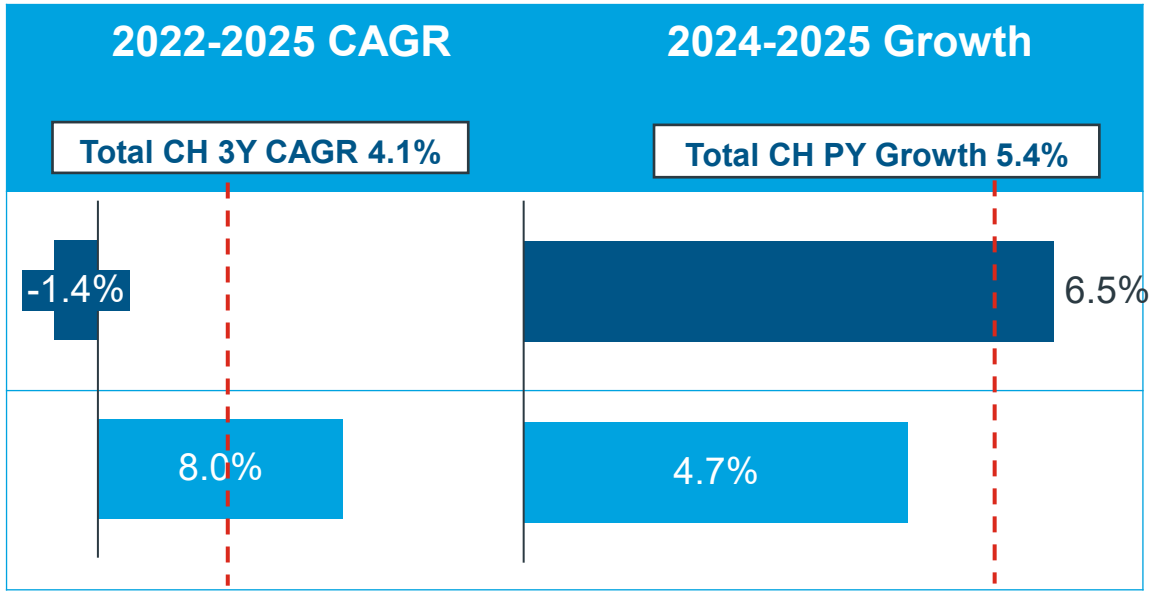
Portugal CH Market Size & Growth

The CH market has grown by 4.1% between 2022 and 2025, with medical devices making up 37% of the market shares

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

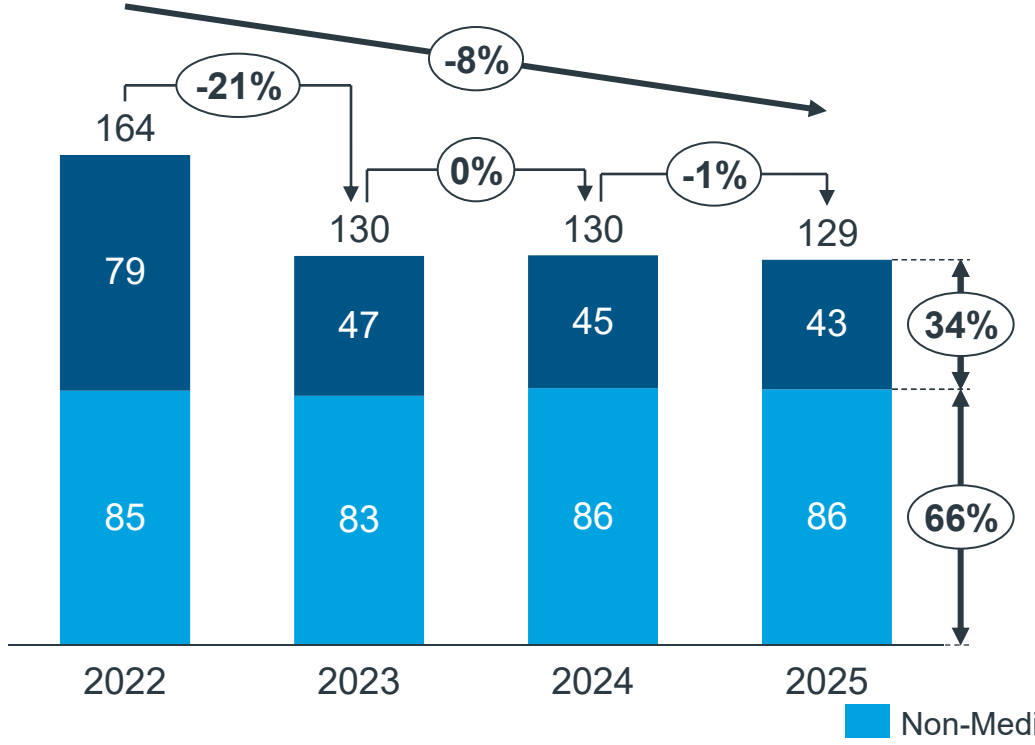


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

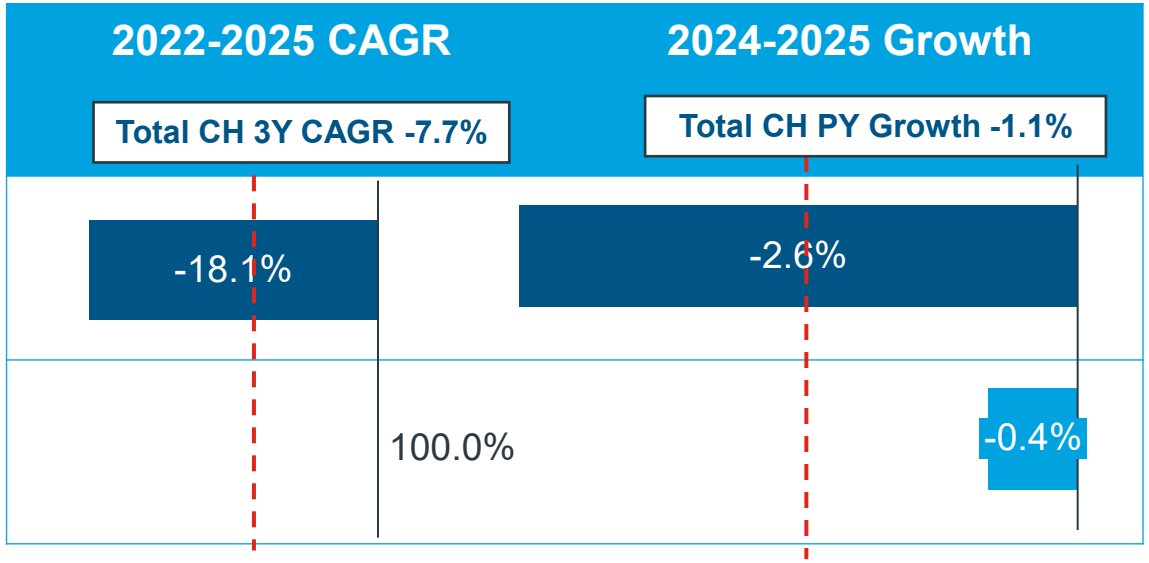
Portugal CH Market Volume & Growth

Medical devices account for 34% of the CH market volume, while overall market has had a negative volume trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



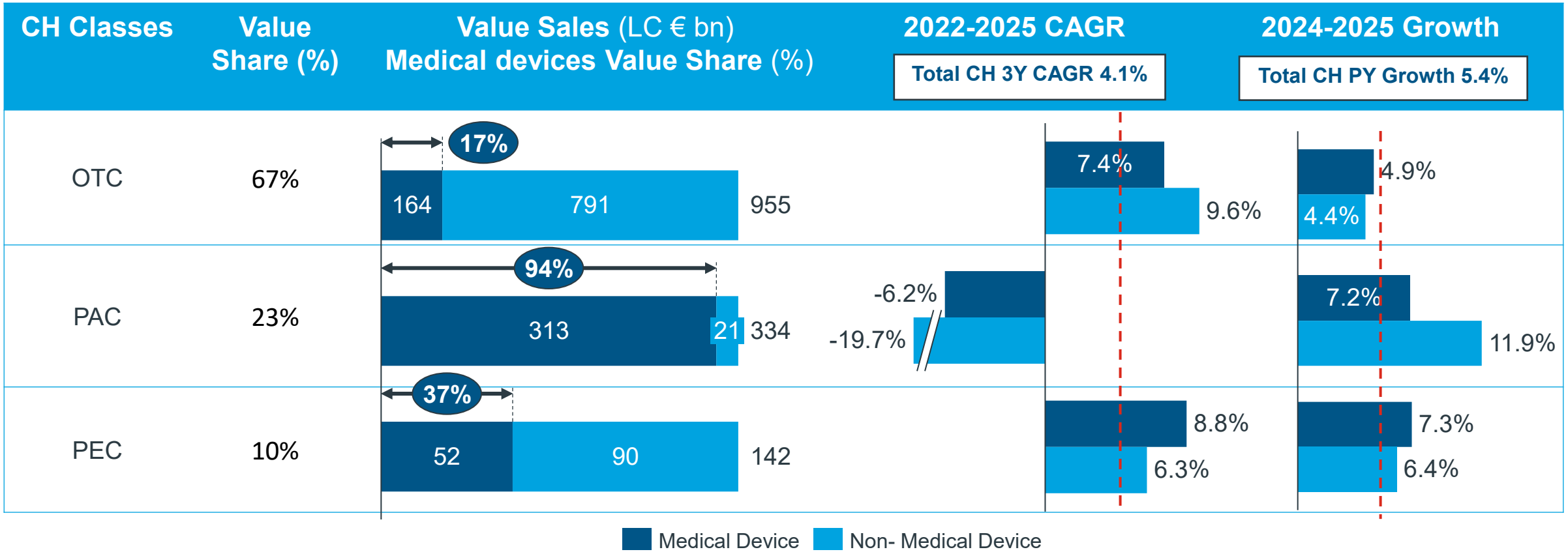
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Portugal CH Performance by Classes

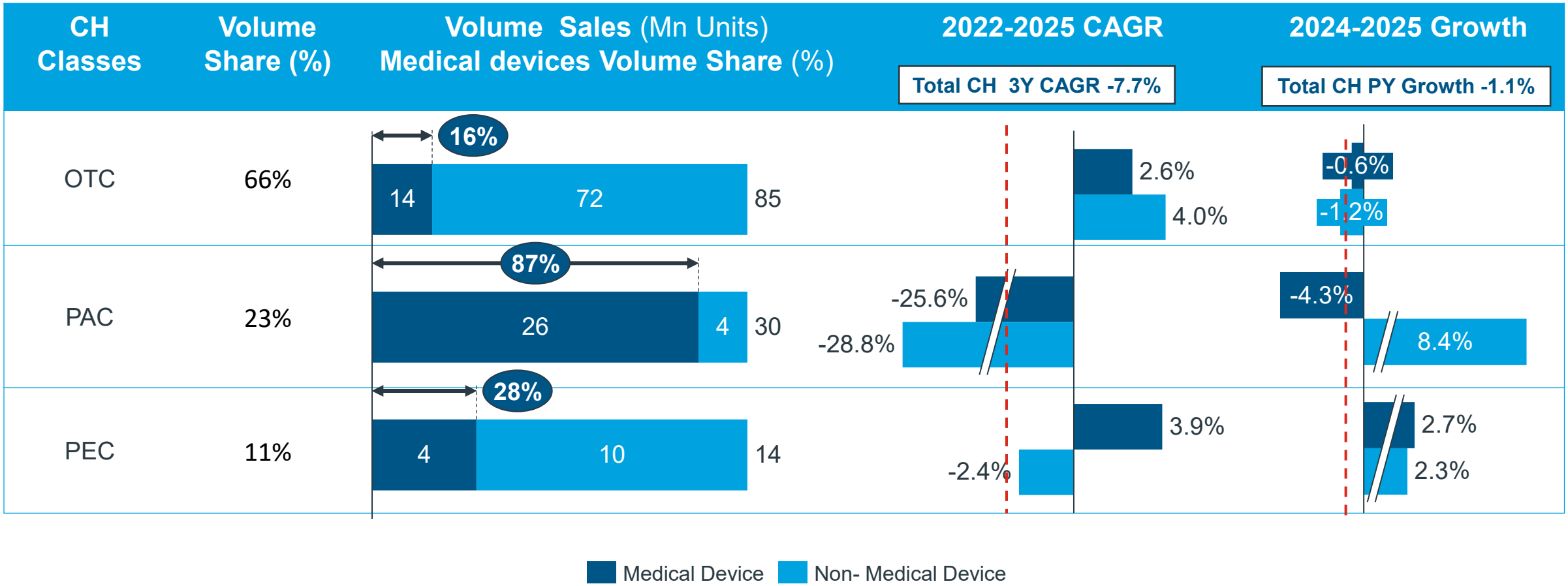
*PAC leads with **€313 Mn** in medical device sales and positive growth in the recent year*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Bulgaria CH Performance by Classes

Patient Care leads in medical device volume sales with 26 Mn units and holds the highest medical device volume share (87%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Portugal Medical Devices Packs & New Launches

The majority of the Medical devices new launches come from Patient Care category in last 3 years

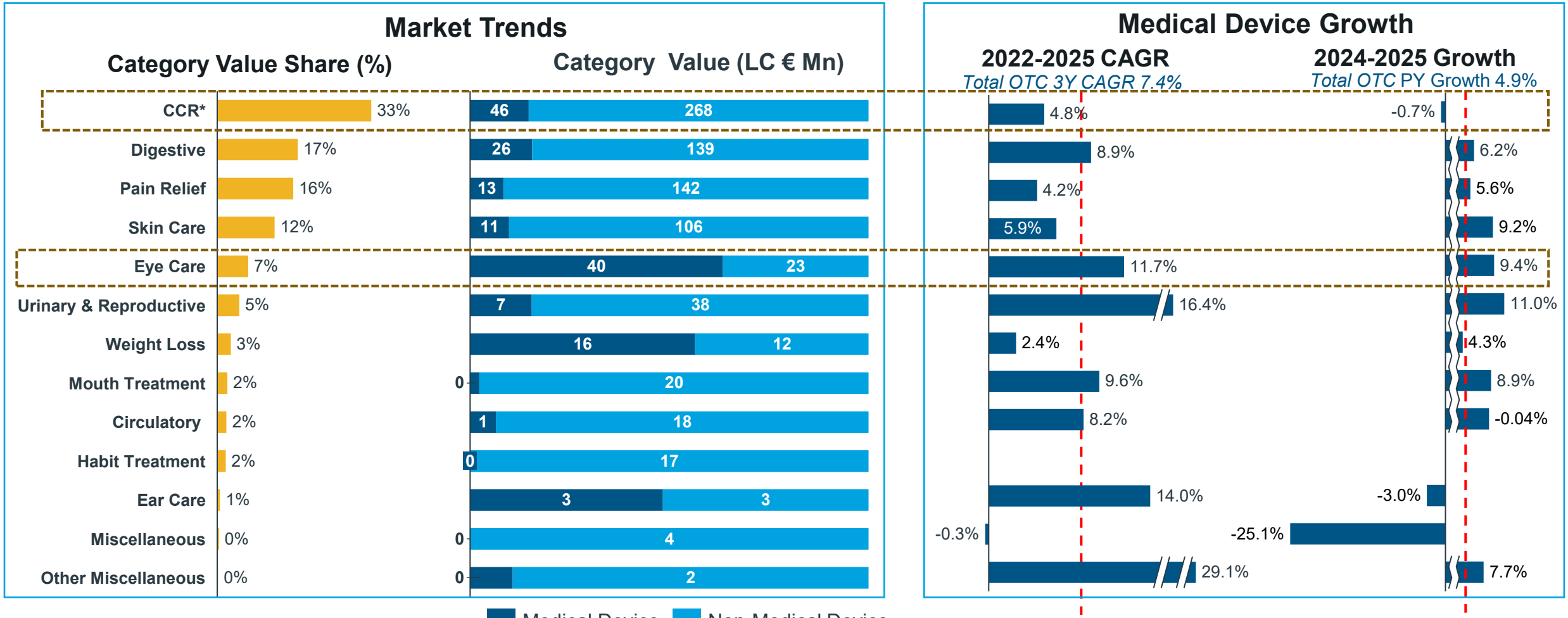
Category	Total Packs*			New Launches**		
CH Total	13,095	10,963	**24,058**	2,668	3,332	**6,000**
OTC	624	3,385	**4,009**	168	1,102	**1,270**
Patient Care	12,265	3,555	**15,820**	2,433	1,150	**3,583**
Personal Care	206	4,023	**4,229**	67	1,080	**1,147**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Portugal OTC Performance by CHC 1 Category in 2025

*CCR leads in total medical devices value sales at **€46 Mn,** followed by Eye care at **€40 Mn***

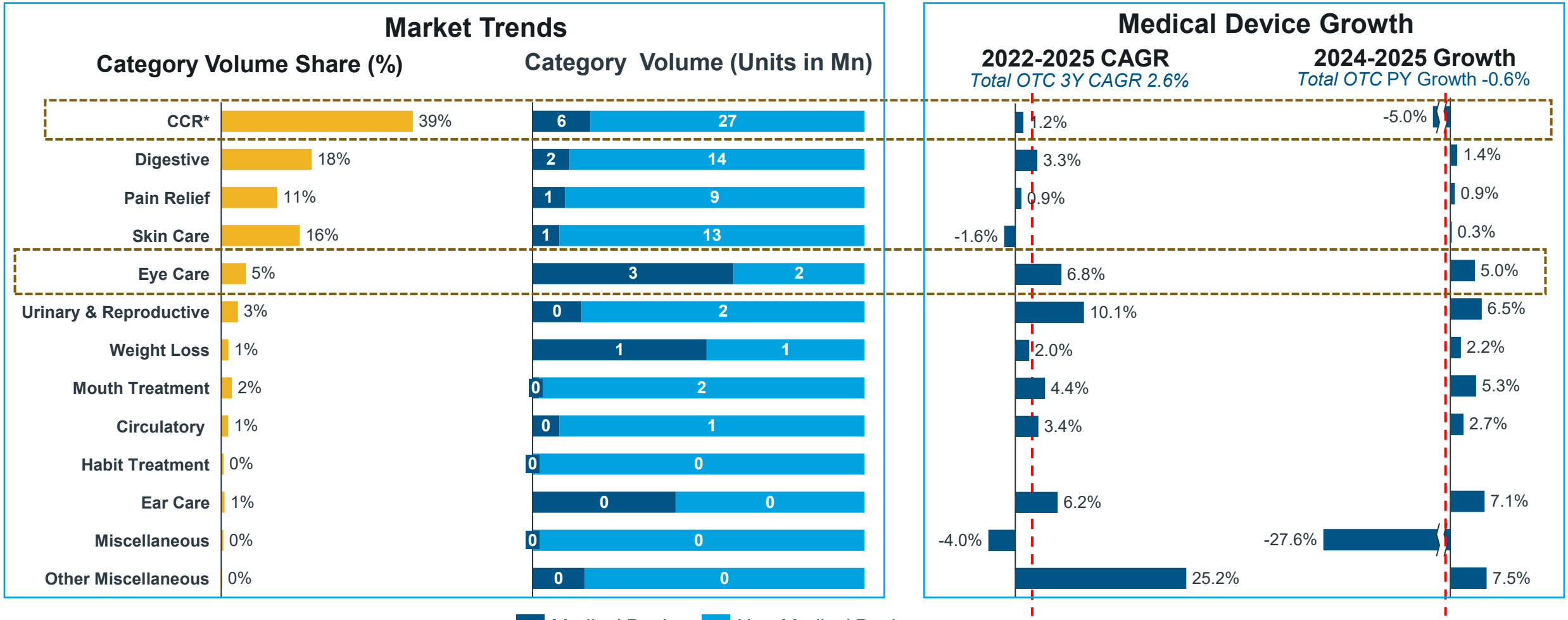


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Portugal OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device sales in terms of volume share, followed by eye care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Portugal Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Nasal saline in CCR product segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**163.7**	
CCR	28%	46.3	Nasal Saline 24.5; Sore Throat 16.6; Cough 3.5; Cold Remedies 1.4
Eye Care	24%	40.1	Not available
Digestive	16%	25.6	Laxatives 18.1; Digestive Acid & Heartburn 5.1; Antidiarrhoeals 2.0; 0.4
Weight Loss	10%	15.6	Not available
Pain Relief	8%	13.1	Muscular Pain 12.2; Mouth Pain 0.9; Dysmenorrhea 0.0; Joint Care 0.0
Skin Care	7%	11.5	Wound Healing 7.2; Wart/Corn Removal 1.7; Hand Skin Wound Disinfect 1.5; Skin Protector/Emollients 0.3

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Portugal Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Urinary & Reproductive	4%	7.0	Gynaecological 5.3; Urinary Condition; Urology Male Condition 0.1; 1.6
Ear Care	2%	2.7	Not available
Circulatory	1%	1.2	Antihemorrhoids 1.1; Chloesterol Regulating; Other Circulatory 0.0; 0.2
Mouth Treatment	0%	0.5	Other Mouth Treatment 0.3; Mouth Infection; Fluoride Products 0.0; 0.2
Other Miscellaneous	0%	0.2	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting; 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Portugal Medical Devices Performance by top CHC 2 Segments

CCR makes up about 42% of all volume sales of medical devices

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**13.7**	
CCR	42%	5.8	Nasal Saline 3.4; Sore Throat 2.1; Cough 0.2; Cold Remedies 0.1
Eye Care	19%	2.6	Not available
Digestive	13%	1.7	Laxatives 1.2; Digestive 0.3; Acid & Heartburn 0.2; Antidiarrhoeals 0.0
Weight Loss	5%	0.6	Not available
Pain Relief	7%	0.9	Muscular Pain 0.9; Mouth Pain 0.1; Dysmenorrhea 0.0; Joint Care 0.0
Skin Care	8%	1.1	Wound Healing 0.7; Hand Skin Wound Disinfect 0.2; Wart/Corn Removal 0.1; Skin Protector/Emollients 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Portugal Medical Devices Performance by top CHC 2 Segments

Urinary and reproductive, Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Urinary & Reproductive	3%	0.4	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Ear Care	2%	0.2	Not available
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

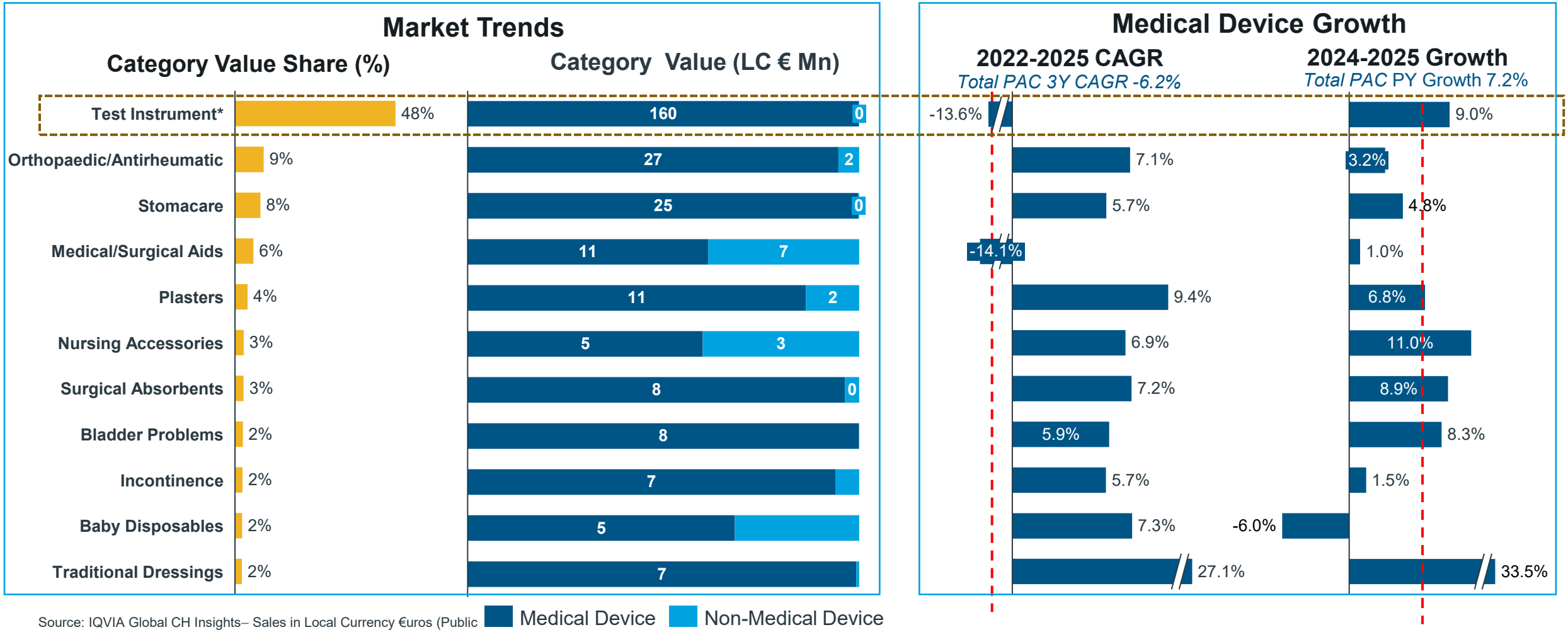
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Portugal PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instrument leads medical devices values with **€160 Mn** sales*

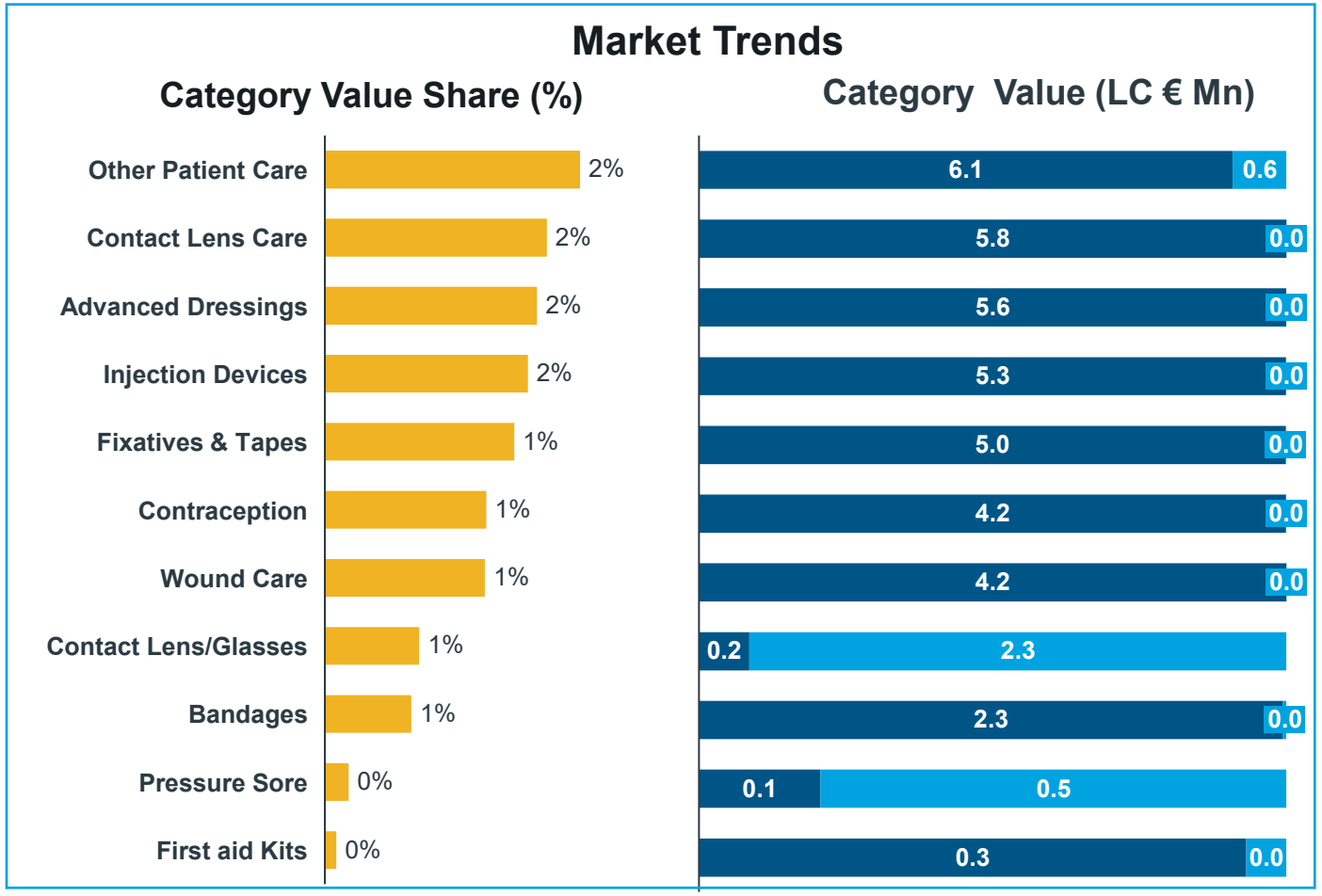


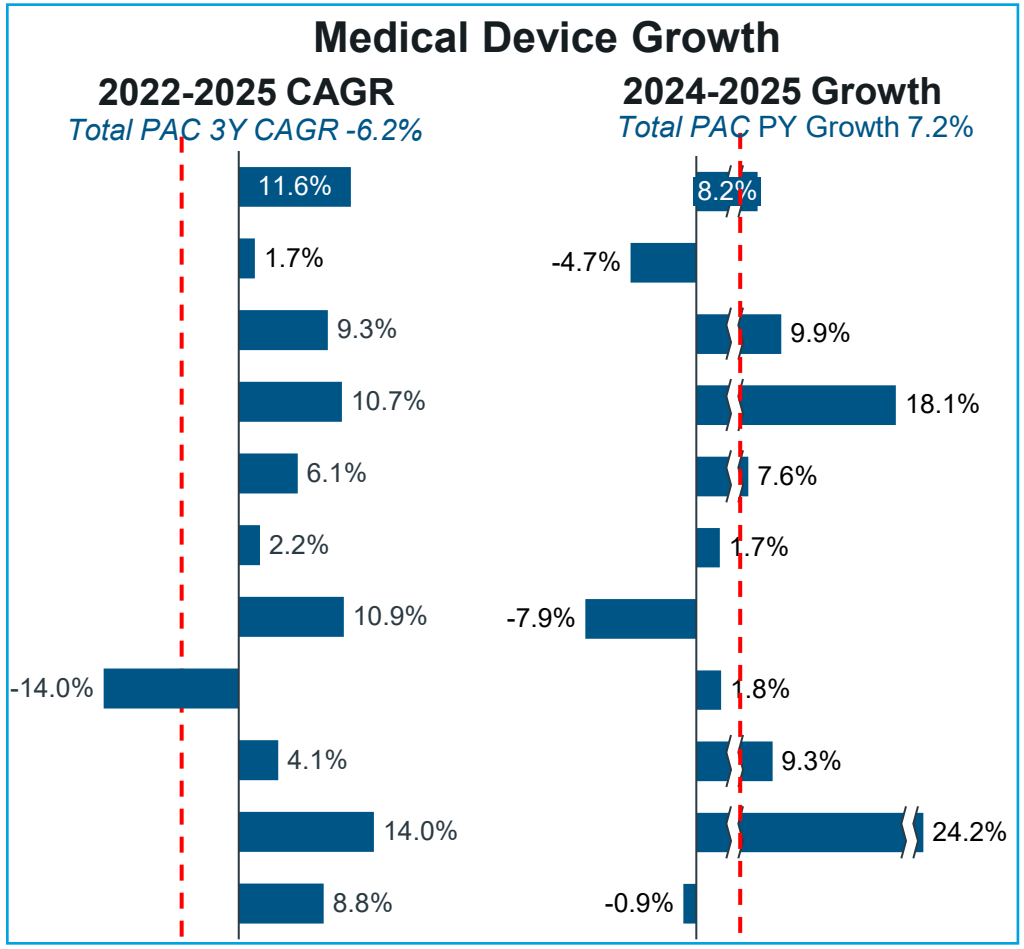
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Portugal PAC Performance by CHC 1 Category in 2025 (2/2)

Multiple other categories lead both S-T and L-T value growth in the medical devices segment



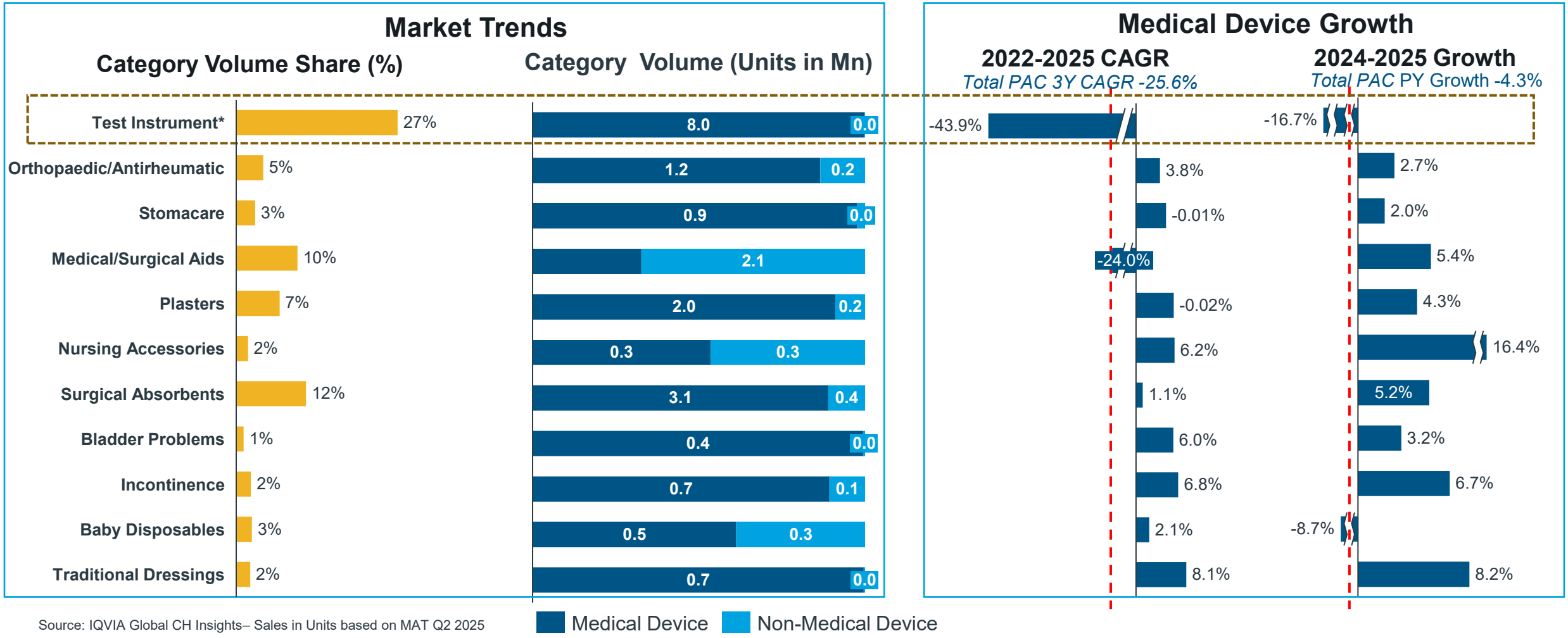


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Portugal PAC Performance by CHC 1 Category (1/2)

Test Instruments hold the highest volume share in medical devices segment as well

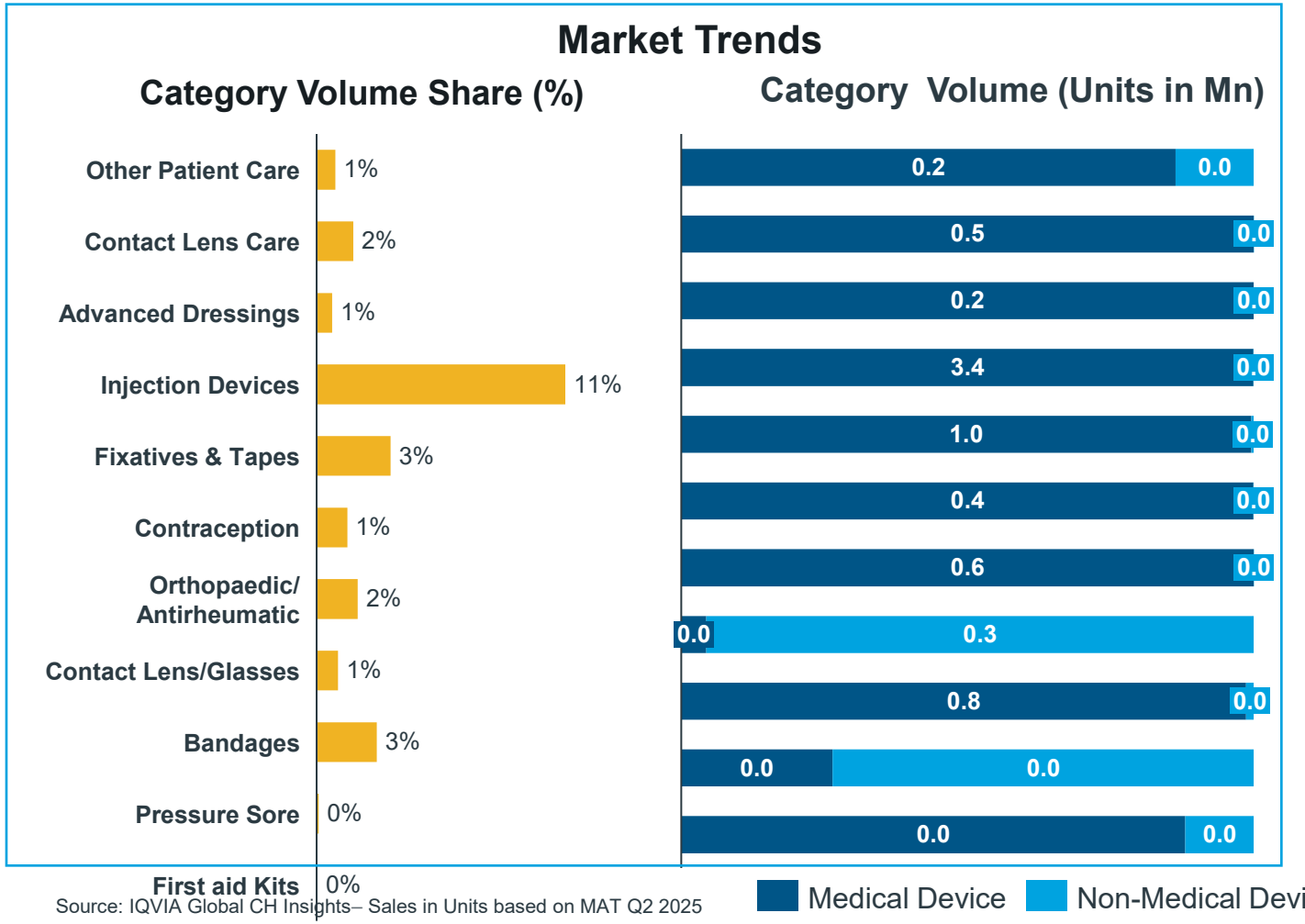


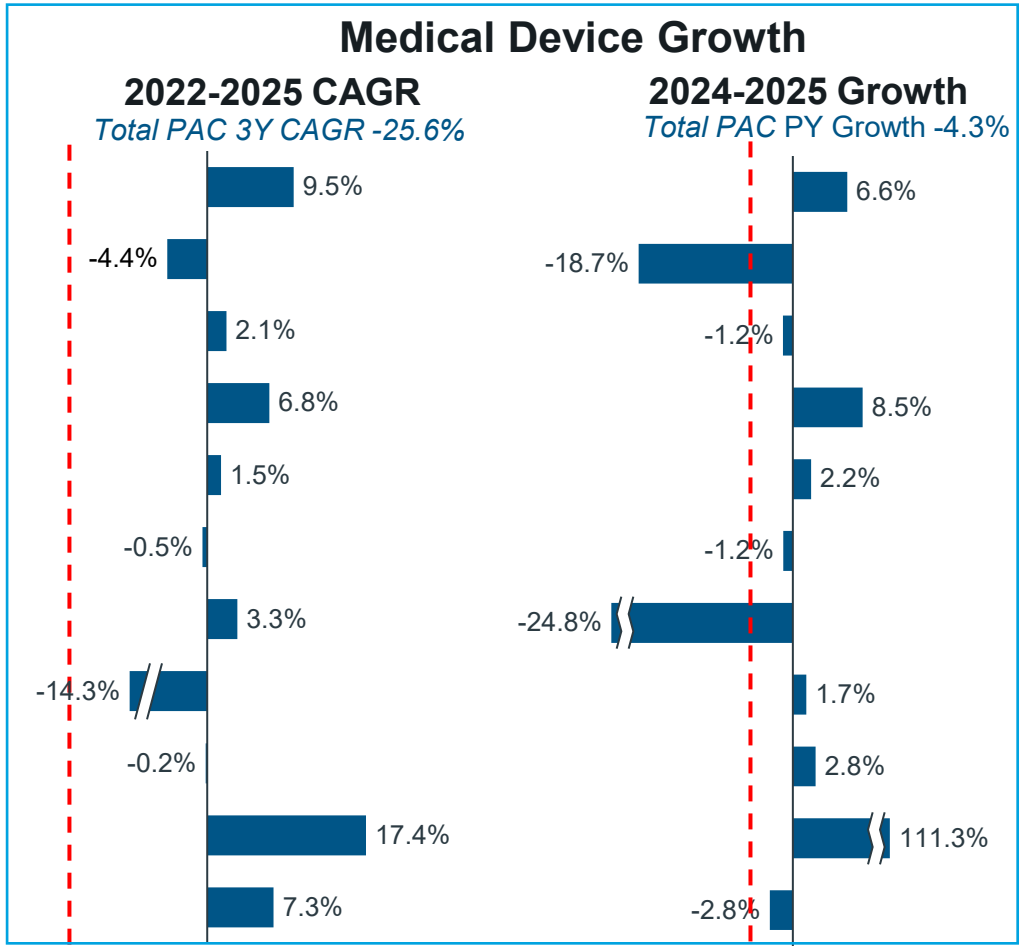
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Portugal PAC Performance by CHC 1 Category (2/2)

Most small categories show both S-T and L-T growth in terms of volume as well





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

S-T – Short term

Portugal Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 75% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**313.1**	
Test Instrument	51%	159.6	Gluc Measuring 121.1; Pregnancy Test 13.8; Blood Press Monitors 9.1; Thermometers 6.0
Orthopaedic/ Antirheumatic	9%	27.0	Curativ/Elastic Stocking 8.9; Belts Other Supp 7.7; Equiment for Disabled 5.4; Clogs+Orthopaedic Footwear 3.0
Stomacare	8%	25.2	Ileo-Colo+Urostomy 21.0; Stomacare Acces. 2.5; Stomacare Protectives 1.7
Medical/ Surgical Aids	4%	11.3	Inhalation & Aerosol 6.8; Gloves 1.1; Hot & Cold Packs 1.0; Electric Instruments 1.0
Plasters	3%	10.9	Special Plaster 5.3; Plaster Strip 3.9; Liquid Plaster 1.0; Plaster Spec. Uses 0.6
Surgical Absorbents	3%	8.3	Swabs & Pads 7.4; Packs & Patches 0.6; Cotton wool 0.3

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Portugal Medical Devices Performance by top CHC 2 Segments

Gluc measuring under Test Instrument lead in medical device volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**25.8**	
Test Instrument	31%	8.0	Gluc Measuring 3.8; Coronavirus Test 1.7; Pregnancy Test 1.5; Thermometers 0.6
Orthopaedic/ Antirheumatic	4%	1.2	Belts Other Supp 0.5; Curativ/Elastic Stocking 0.3; Equiment for Disabled 0.2; Clogs+Orthopaedic Footwear 0.1
Stomacare	4%	0.9	Ileo-Colo+Urostomy 0.6; Stomacare Protectives 0.2; Stomacare Acces. 0.2
Medical/ Surgical Aids	4%	1.0	Gloves 0.3; Hot & Cold Packs 0.2; Inhalation & Aerosol 0.2; Urine test 0.1
Plasters	8%	2.0	Plaster Strip 1.1; Special Plaster 0.7; Liquid Plaster 0.1; Plaster Spec. Uses 0.1
Surgical Absorbents	12%	3.1	Swabs & Pads 2.8; Cotton wool 0.2; Packs & Patches 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

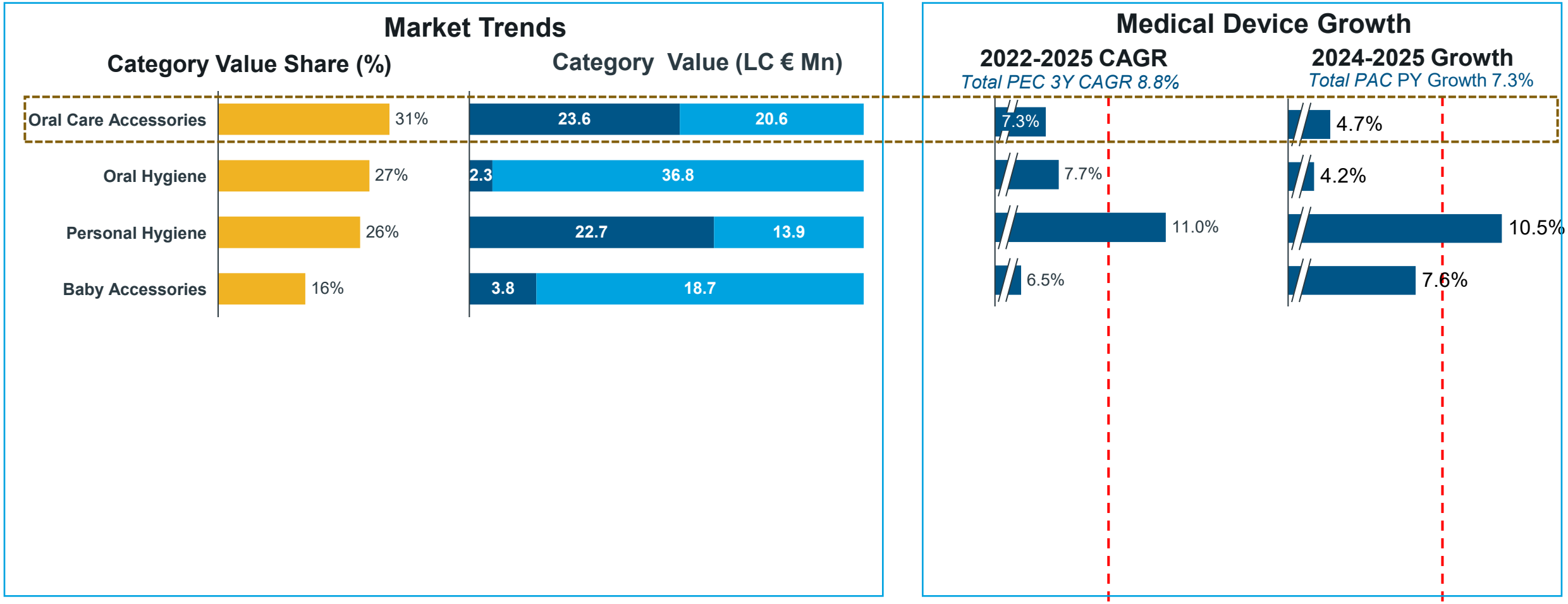
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Portugal PEC Performance by CHC 1 Category

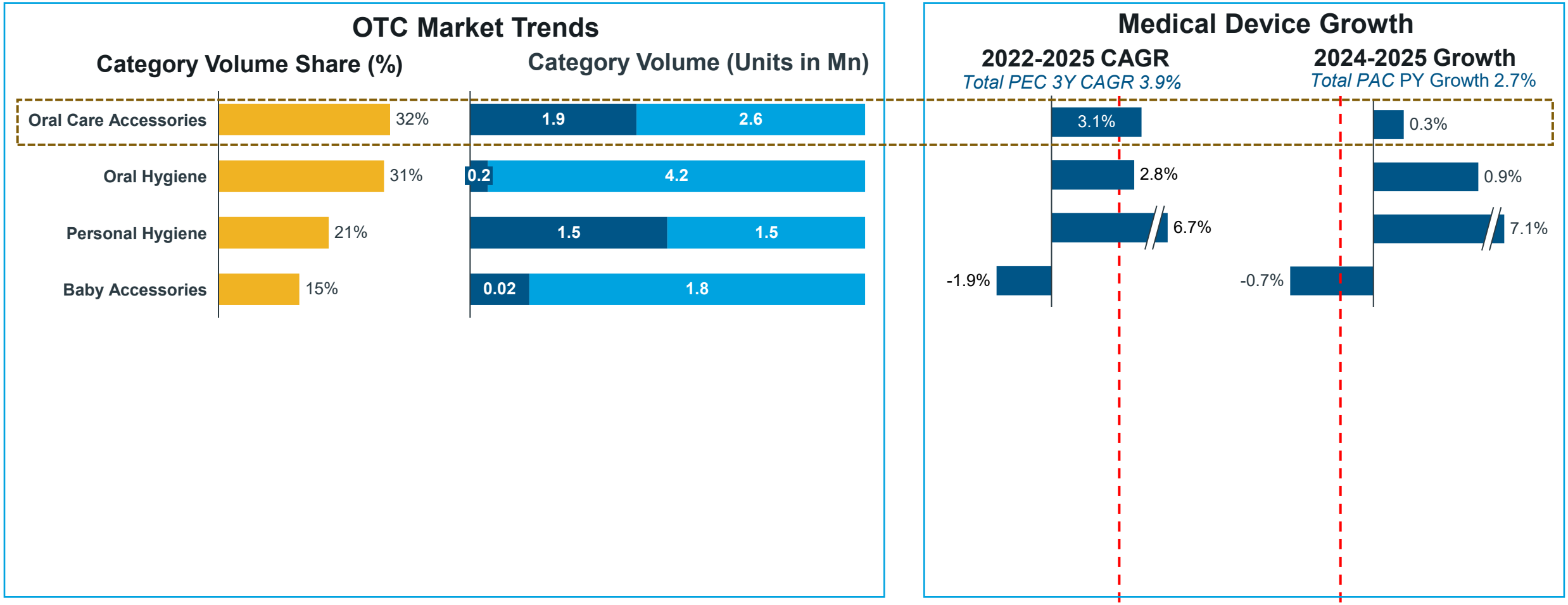
Oral care accessories leads medical devices values; showing positive growth in L-T & S-T



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Portugal PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes within the medical devices segment as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Portugal Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**52.5**	
Oral Care Accessories	45%	23.6	Denture Products 23.2; Other Oral Care Acces. 0.0; Toothbrushes 0.4; Dental Sticks 0.0
Personal Hygiene	43%	22.7	Intimate Hygiene 22.7; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Baby Accessories	7%	3.8	Dummies/Pacifiers/Teeth 2.5; Feeding Bottles &Acces. 1.3
Oral Hygiene	4%	2.3	Toothpastes 2.2; Mouthwashes 0.1; Other Oral Care 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Portugal Medical Devices Performance by top CHC 2 Segments

Oral Care Accessories share the largest volume of medical devices as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**3.9**	
Oral Care Accessories	49%	1.9	Denture Products 1.9; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Sticks 0.0
Personal Hygiene	37%	1.5	Intimate Hygiene 1.5; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Baby Accessories	8%	0.3	Dummies/Pacifiers/Teeth 0.3; Feeding Bottles &Acces. 0.0
Oral Hygiene	5%	0.2	Toothpastes 0.2; Mouthwashes 0.0; Other Oral Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Switzerland Medical Devices – Market Dynamics

Switzerland Medical Devices Performance Overview

Medical devices show overall positive S-T value growth, while OTC and Personal Care segments demonstrate long-term growth in value

29%

Medical device share of total CH value in 2025

Long –term Growth

-8.1% by value

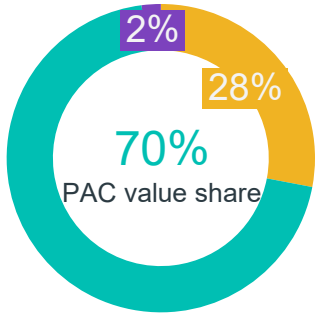
-15.5% by volume

Short –term Growth

2.0% by value

-0.5% by volume

Medical Devices – €514 Mn (2025)



Long-term Growth (Value)

-11.3% PAC

1.4% OTC

2% PEC

Medical Devices Categories

45%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **91%** of new pack launches

Medical Devices Innovation

Test Instruments

27% *Share of total PAC values in 2025; Dominated by **Gluc Measuring***

Long-term Growth

-26.6% by value

PAC (Patient care)

CCR

38% *Share for total OTC value in 2025 Dominated by **Nasal Saline***

Long-term Growth

2.5% by value

OTC (Over-the-Counter)

Personal Hygiene

71% *Share of total PEC value share in 2025; Dominated by **Intimate hygiene***

Long term Growth

2.9% by value

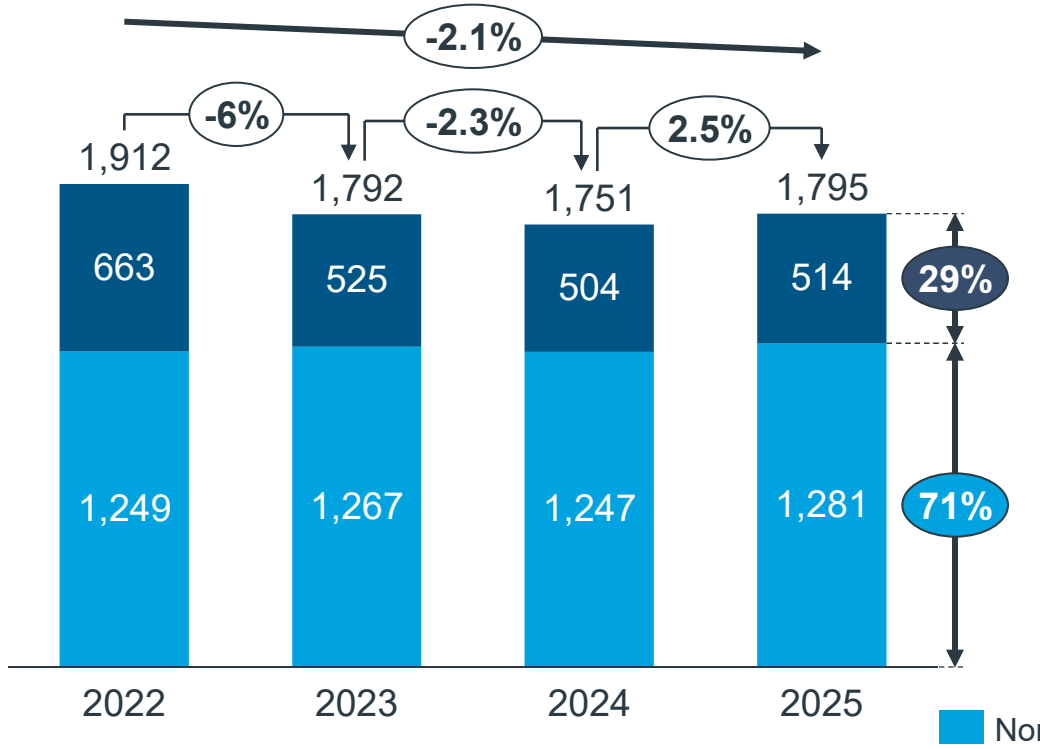
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

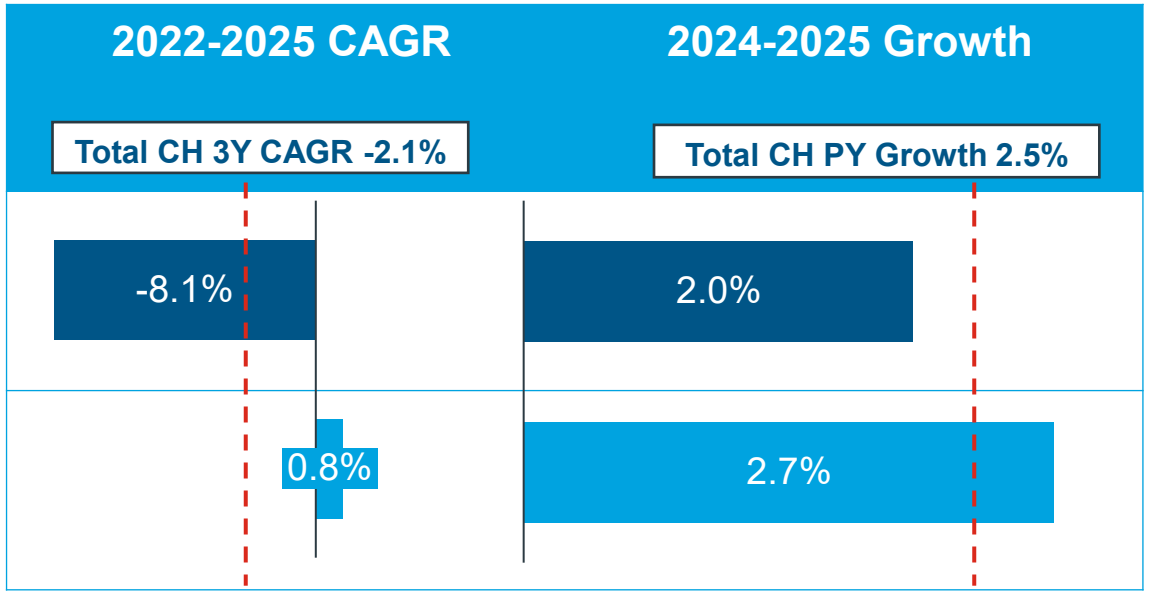
Switzerland CH Market Size & Growth

Medical devices account for 29% of Switzerland's total CH value share in 2025 and demonstrate a positive year-on-year growth from 2024 to 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

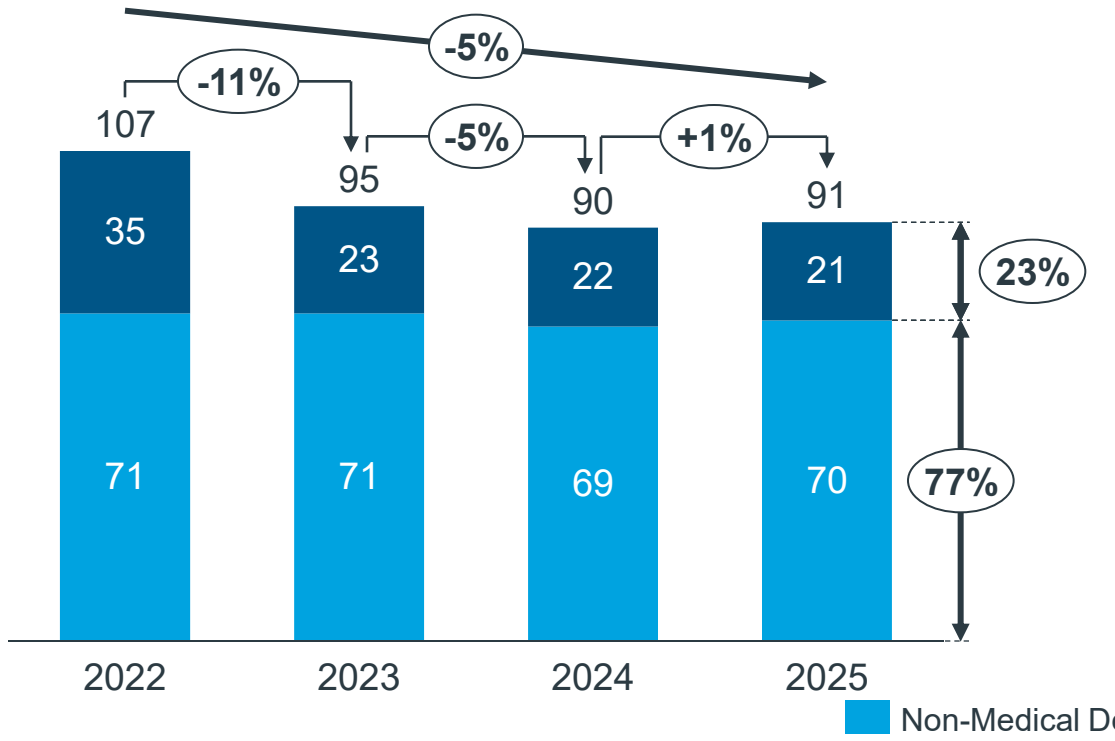


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

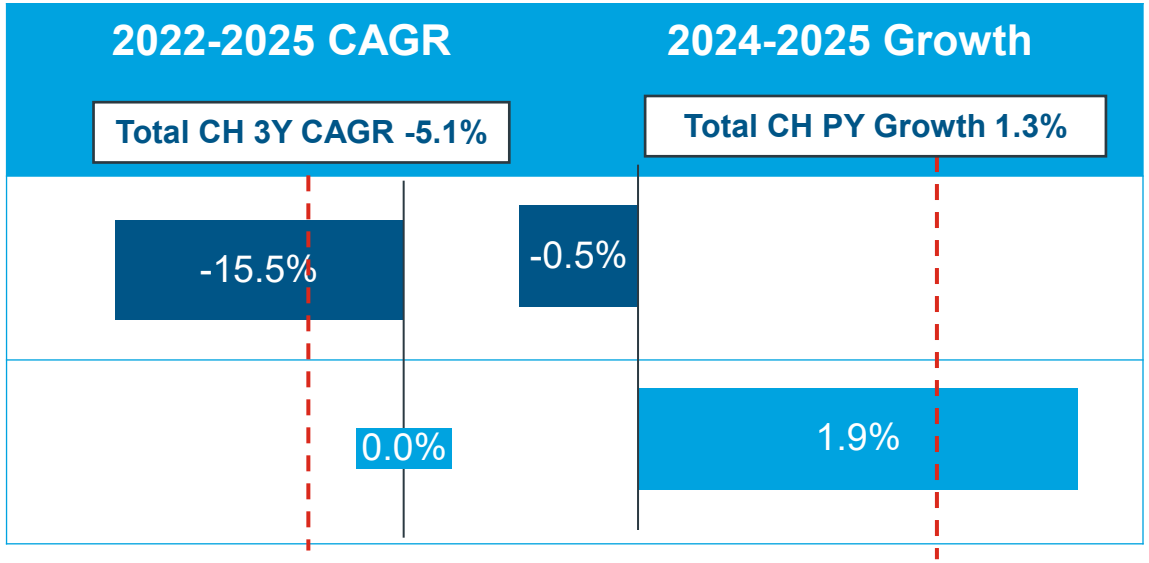
Switzerland CH Market Volume & Growth

Medical devices volume declines impact the overall segment growth

Market Volume (Mn Units), and Latest Volume Share (%)



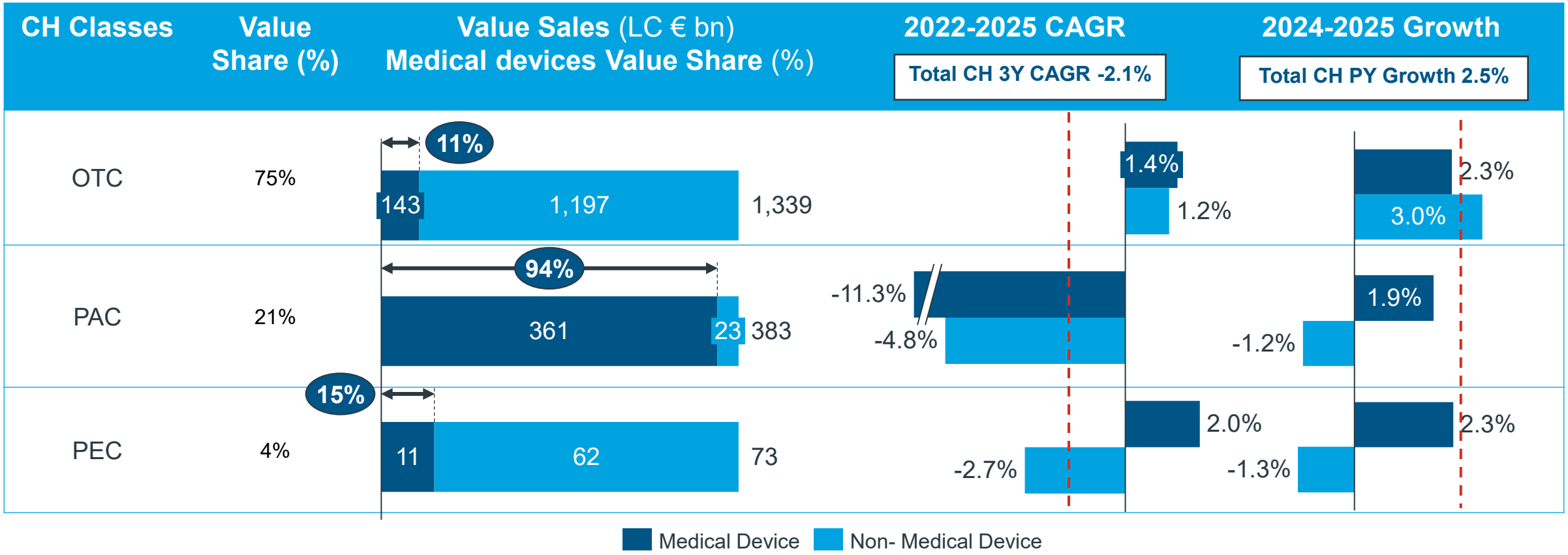
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Switzerland CH Performance by Classes

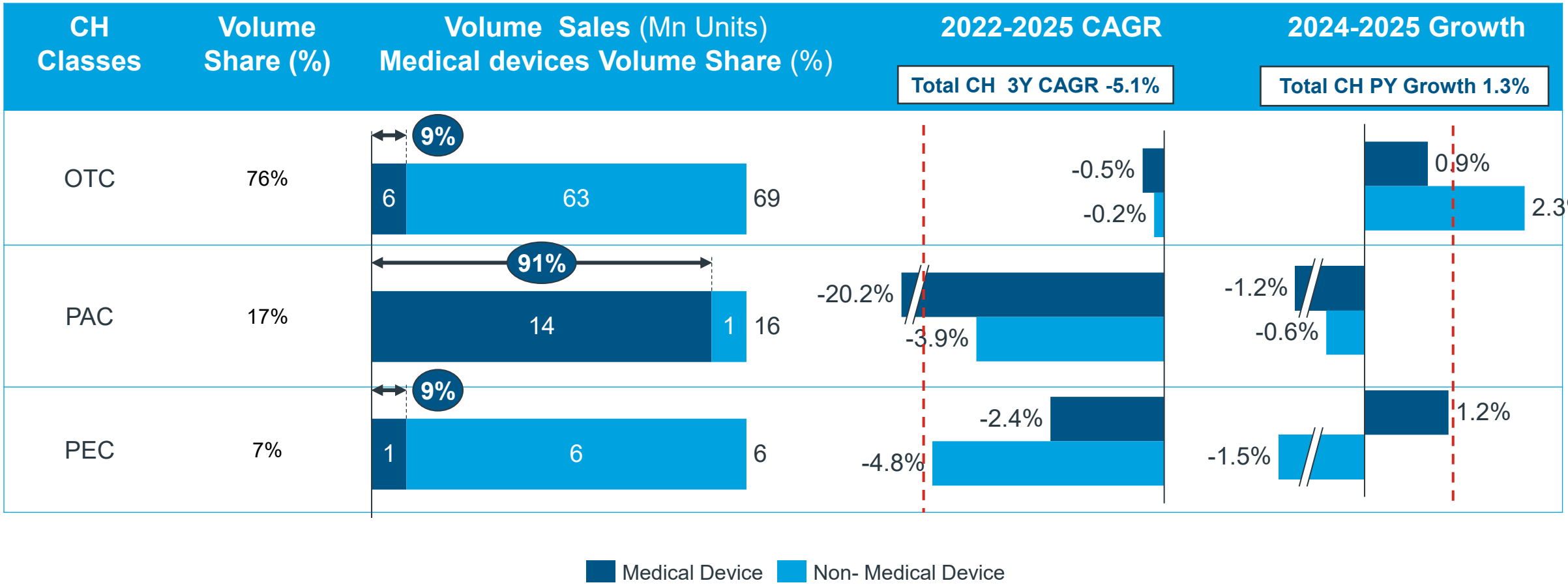
*PAC segment leads with **€0.36 bn** and contributes the largest share to the medical devices category, accounting for 94% of its segment value*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Switzerland CH Performance by Classes

PAC leads in medical device volume sales with 14mn units, while the overall market shows a positive S-T growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Switzerland Medical Devices Packs & New Launches

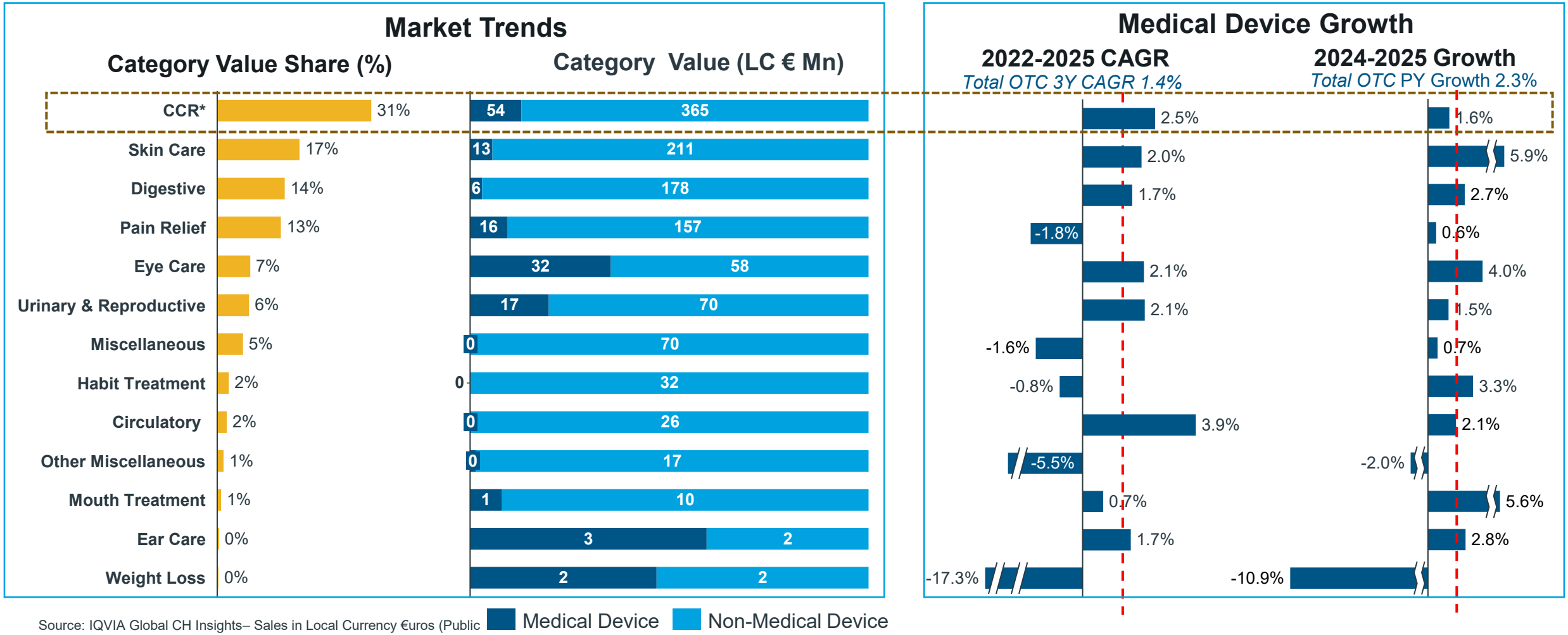
In the past three years, most new medical device launches have originated from the PAC category

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	10,285	13,978	**24,263**	1,548	1,898	**3,446**
OTC	1,141	9,087	**10,228**	118	898	**1,016**
Patient Care	9,012	2,548	**11,560**	1,409	534	**1,943**
Personal Care	132	2,343	**2,475**	21	466	**487**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Switzerland OTC Performance by CHC 1 Category in 2025

CCR dominates with value sales of €54 Mn, followed by Eye care

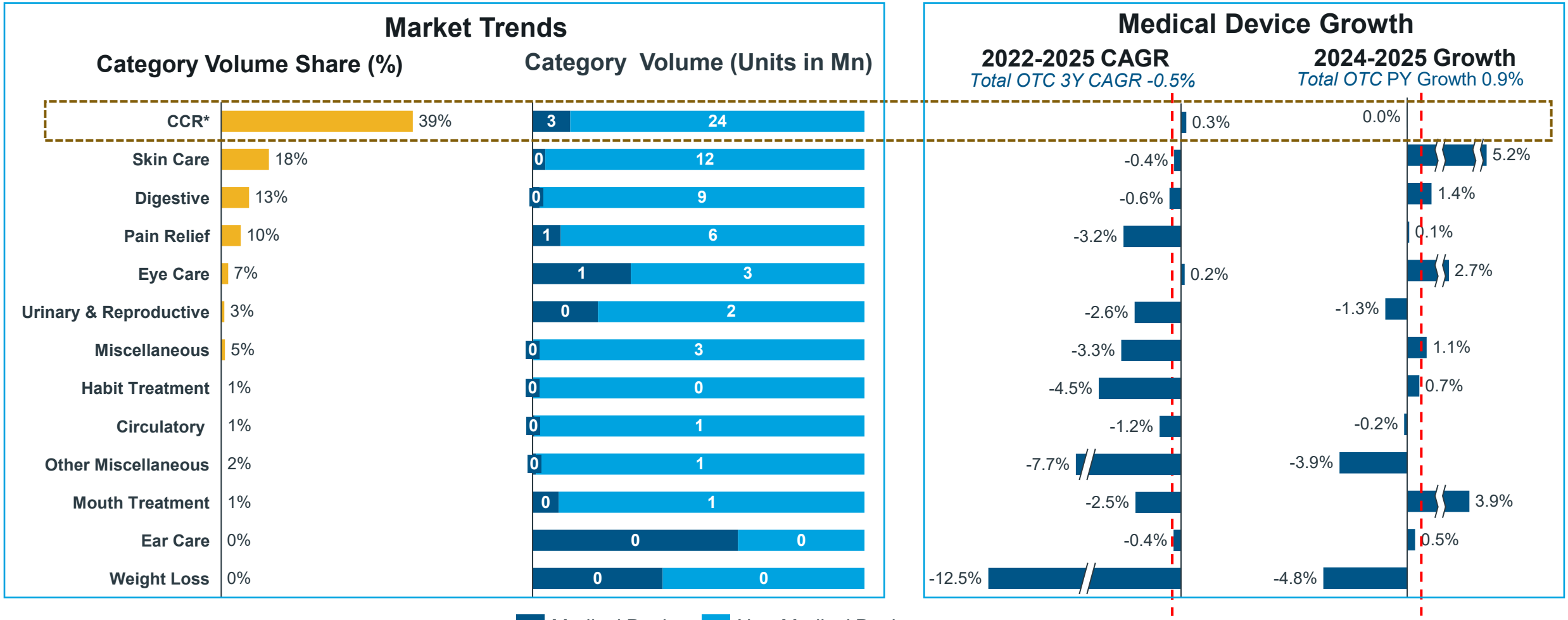


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Switzerland OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Switzerland Medical Devices Performance by top CHC 2 Segments

The top 6 categories contribute towards > 95% of values, with nasal saline leading in CCR segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**142.8**	
CCR	38%	54.0	Nasal Saline 26.0; Sore Throat 11.0; Cough 9.7; Cold Remedies 3.8
Eye Care	22%	31.7	Not available
Urinary & Reproductive	12%	17.1	Urinary Condition 12.2; Gynaecological 4.9; Urology 0.0; Male Condition
Pain Relief	11%	16.1	Muscular Pain 15.1; Dysmenorrhea 0.5; Joint Care 0.3; Mouth Pain 0.2
Skin Care	9%	12.6	Wart/Corn Removal 4.3; Wound Healing 2.5; Antifungals 2.2; Hand Skin Wound Disinfect 1.3
Digestive	4%	5.5	Laxatives 1.8; Antidiarrhoeals 1.6; Acid & Heartburn 1.3; Digestive 0.8

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Switzerland Medical Devices Performance by top CHC 2 Segments

Ear care, weight loss, and mouth treatment make up less than 5% of the medical device value share

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	2%	2.8	Not available
Weight Loss	1%	1.7	Not available
Mouth Treatment	1%	0.8	Other Mouth Treatment 0.7; Mouth Infection 0.1; Fluoride Products 0.0
Other Miscellaneous	0%	0.2	Not available
Miscellaneous	0%	0.2	Not available
Circulatory	0%	0.1	Antihemorrhoids 0.1; Other Circulatory 0.0; Chloesterol Regulating 0.0
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Switzerland Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in volumes as well; CCR accounts for ~50% of the total medical device volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**6.4**	
CCR	48%	3.1	Nasal Saline 1.4; Sore Throat 0.7; Cough 0.6; Cold Remedies 0.2
Eye Care	21%	1.4	Not available
Urinary & Reproductive	7%	0.4	Urinary Condition 0.2; Gynaecological 0.2; Urology Male Condition 0.0
Pain Relief	9%	0.6	Muscular Pain 0.5; Dysmenorrhea 0.0; Mouth Pain 0.0; Joint Care 0.0
Skin Care	8%	0.5	Wound Healing 0.1; Wart/Corn Removal 0.1; Hand Skin Wound Disinfect 0.1; Antifungals 0.1
Digestive	3%	0.2	Laxatives 0.1; Acid & Heartburn 0.1; Antidiarrhoeals 0.0; Digestive 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Switzerland Medical Devices Performance by top CHC 2 Segments

Mouth treatment and ear care products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	3%	0.2	Not available
Weight Loss	0%	0.0	Not available
Mouth Treatment	1%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Circulatory	0%	0.0	Antihemorrhoids 0.0; Other Circulatory 0.0; Chloesterol Regulating 0.0
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

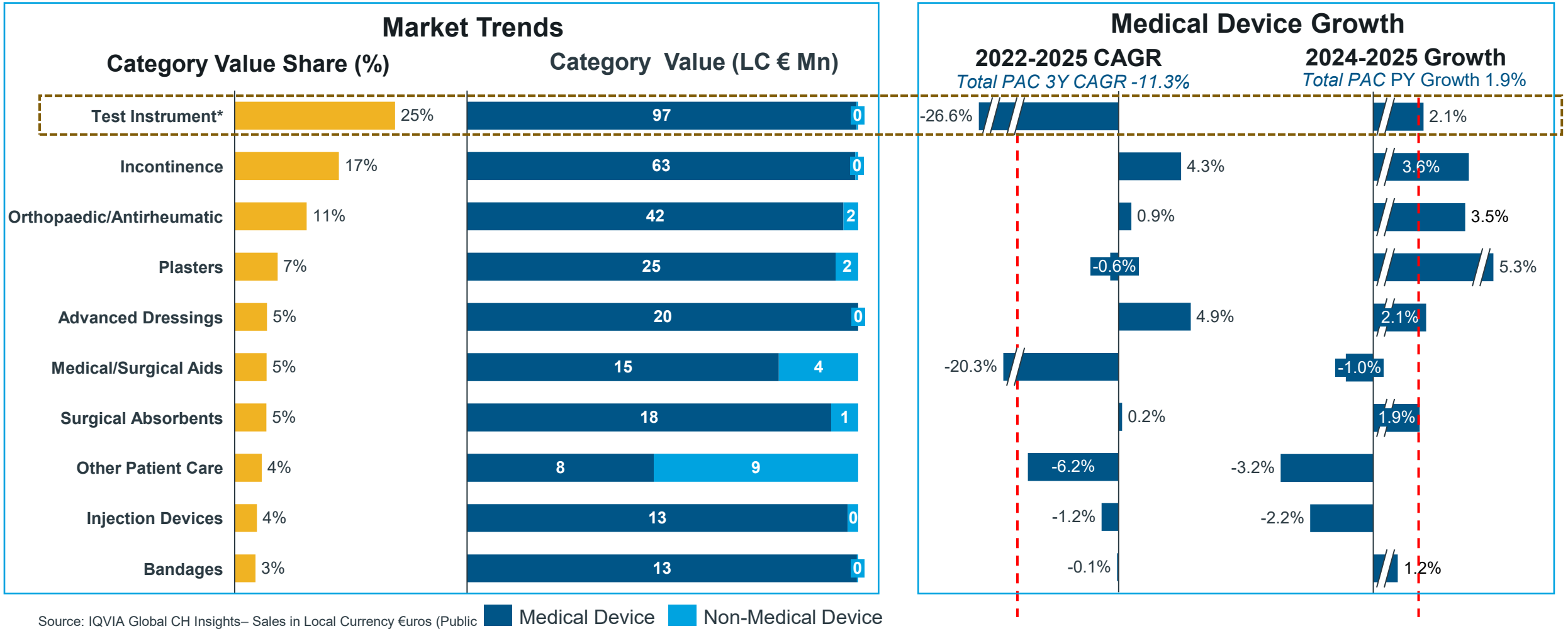
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Switzerland PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments leads medical devices values with **€97 Mn** in sales and a 25% value share*

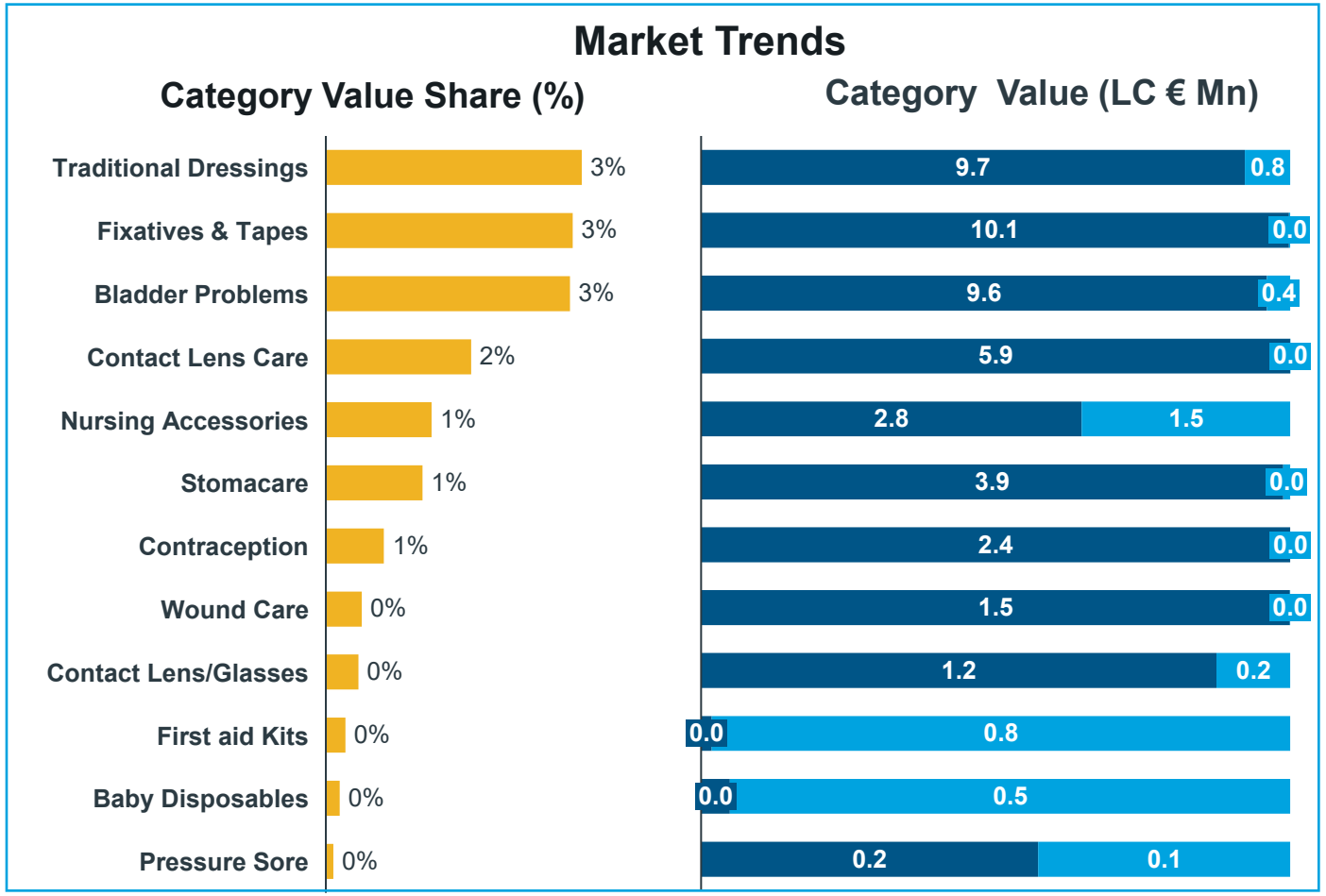


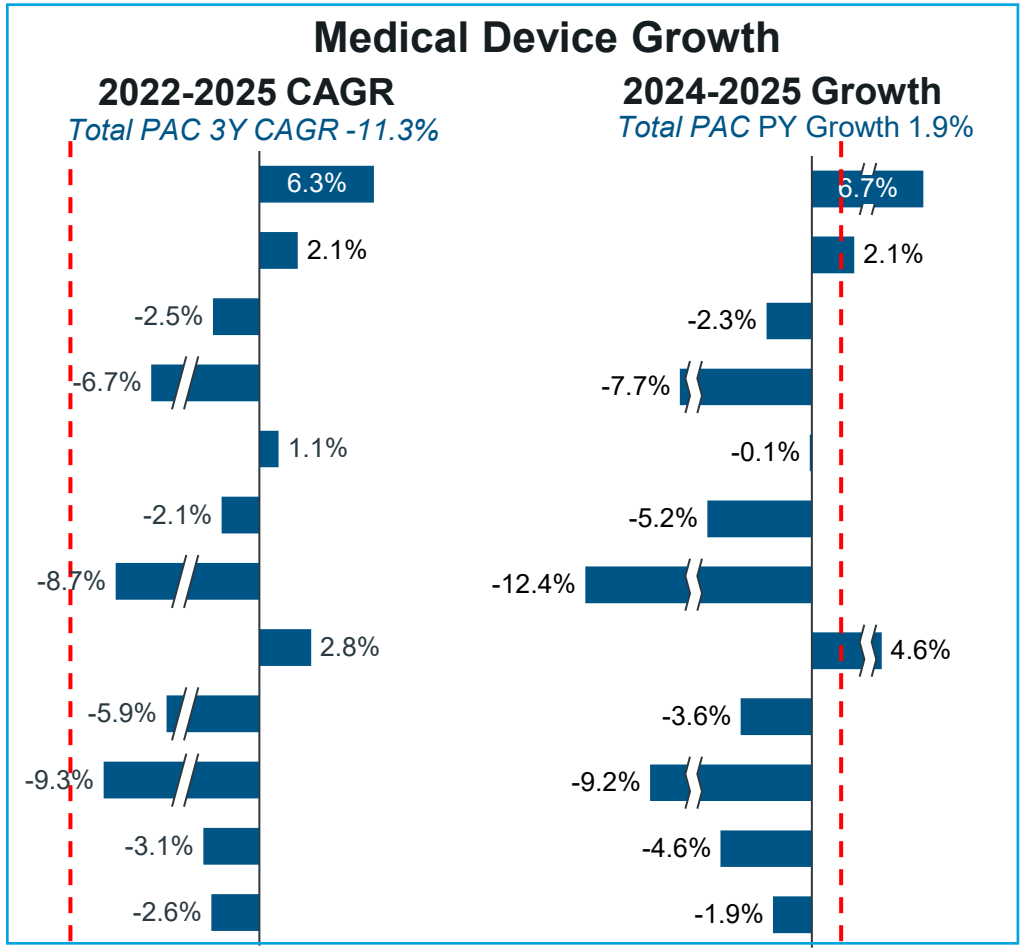
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Switzerland PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like traditional dressings and fixatives and tapes show a positive growth trend



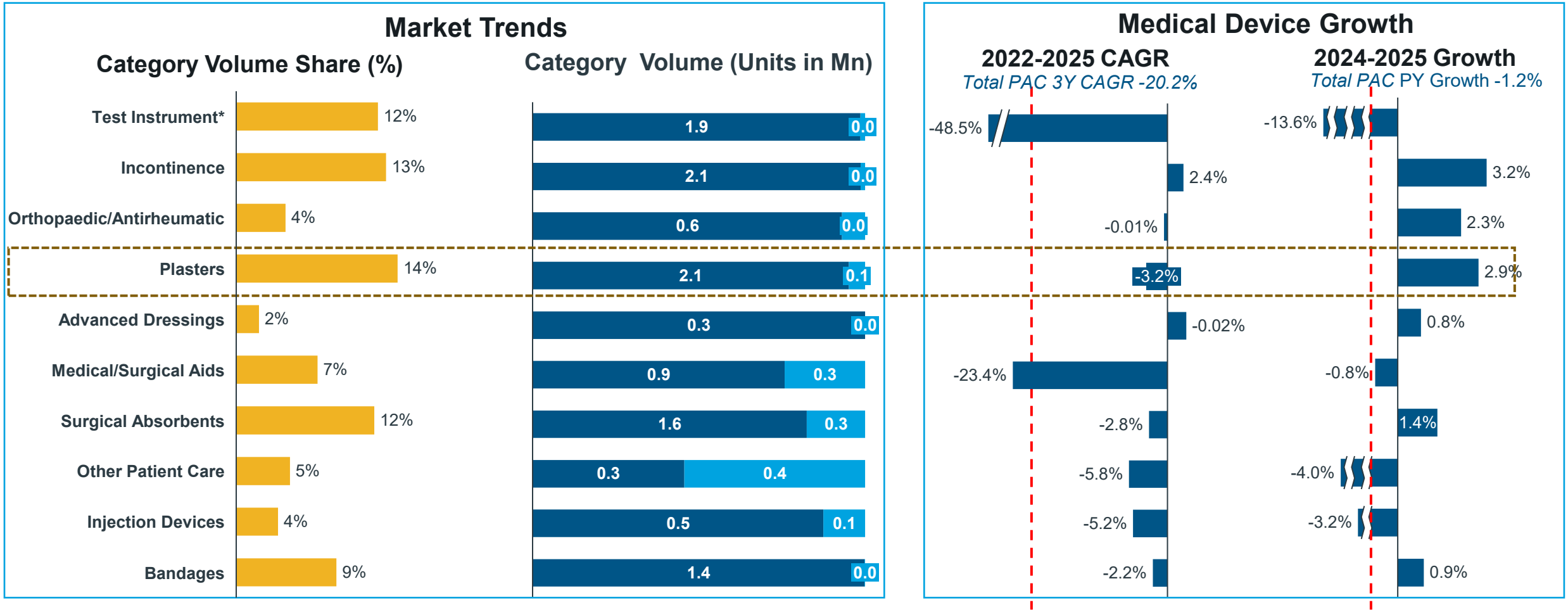


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Switzerland PAC Performance by CHC 1 Category (1/2)

Plasters account for the largest volume share and show a 2.9% growth in a declining market

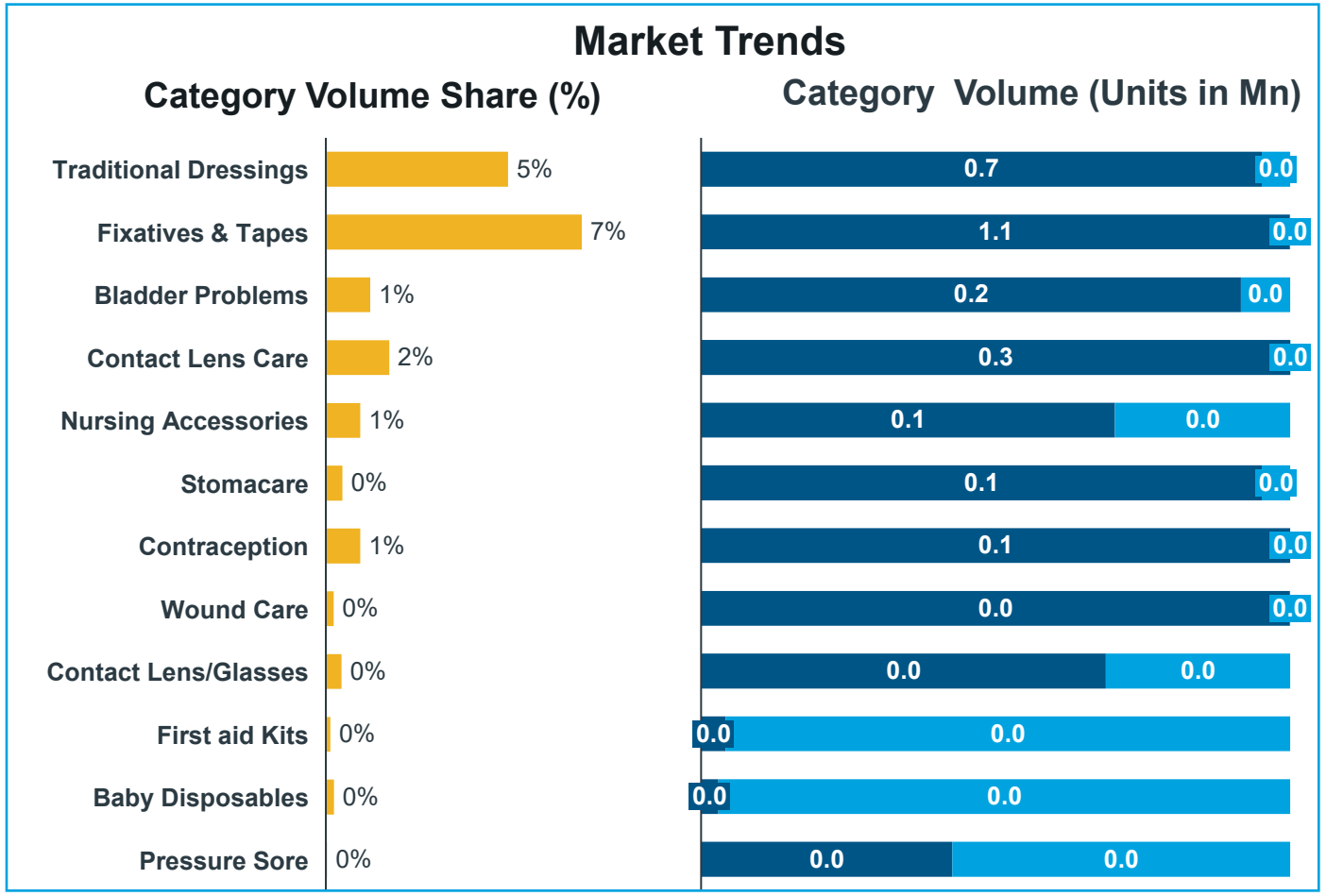


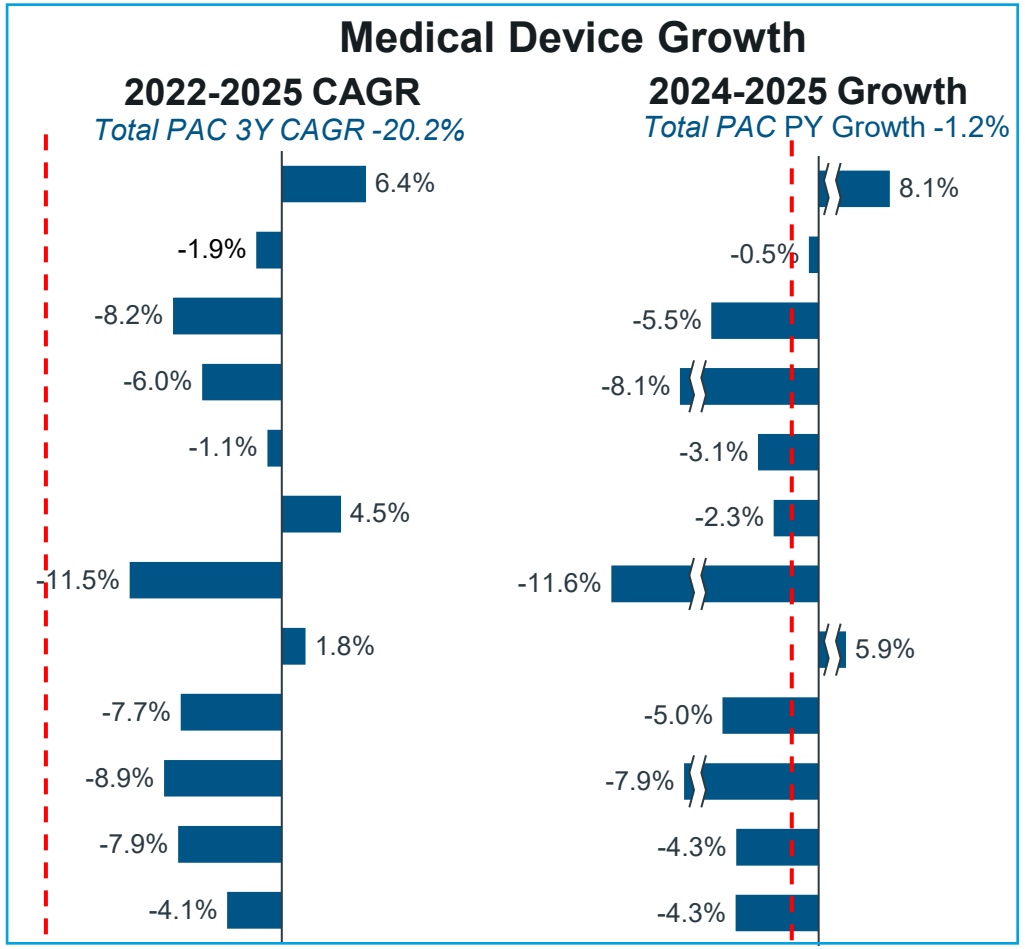
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Switzerland PAC Performance by CHC 1 Category (2/2)

Traditional dressings and wound care products show growth despite the overall market decline





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

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Switzerland Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 70% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**360.6**	
Test Instrument	27%	97.2	Gluc Measuring 63.9; Blood Press Monitors 11.5; Thermometers 7.2; Pregnancy Test 5.9
Incontinence	17%	62.9	Mod Heav Sev Incont. 49.8; Light Incontinence 10.6; Bed Sheets/Pads 2.1; Incontinence care 0.4
Orthopaedic/ Antirheumatic	12%	42.2	Curativ/Elastic Stocking 22.1; Belts Other Supp 16.0; Equiment for Disabled 1.7; Clogs+Orthopaedic Footwear 1.1
Plasters	7%	24.6	Special Plaster 12.7; Plaster Strip 8.7; Plaster Spec. Uses 1.8; Liquid Plaster 1.4
Advanced Dressings	5%	19.6	Base Tech 17.7; Anti-Infection 1.9; Hyaluron 0.0; Collagen 0.0
Surgical Absorbents	5%	17.9	Swabs & Pads 15.9; Cotton wool 1.4; Packs & Patches 0.6

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Switzerland Medical Devices Performance by top CHC 2 Segments

Plasters lead in volume share with 15% of total medical device sales

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**14.4**	
Test Instrument	13%	1.9	Gluc Measuring 0.9; Thermometers 0.3; Pregnancy Test 0.2; Coronavirus Test 0.2
Incontinence	14%	2.1	Mod Heav Sev Incont. 1.4; Light Incontinence 0.6; Bed Sheets/Pads 0.1; Incontinence care 0.0
Orthopaedic/ Antirheumatic	4%	0.6	Belts Other Supp 0.3; Curativ/Elastic Stocking 0.2; Equiment for Disabled 0.0; Clogs+Orthopaedic Footwear 0.0
Plasters	15%	2.1	Plaster Strip 1.2; Special Plaster 0.8; Liquid Plaster 0.1; Plaster Spec. Uses 0.0
Advanced Dressings	2%	0.3	Base Tech 0.3; Anti-Infection 0.0; Hyaluron 0.0; Collagen 0.0
Surgical Absorbents	11%	1.6	Swabs & Pads 1.4; Cotton wool 0.1; Packs & Patches 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

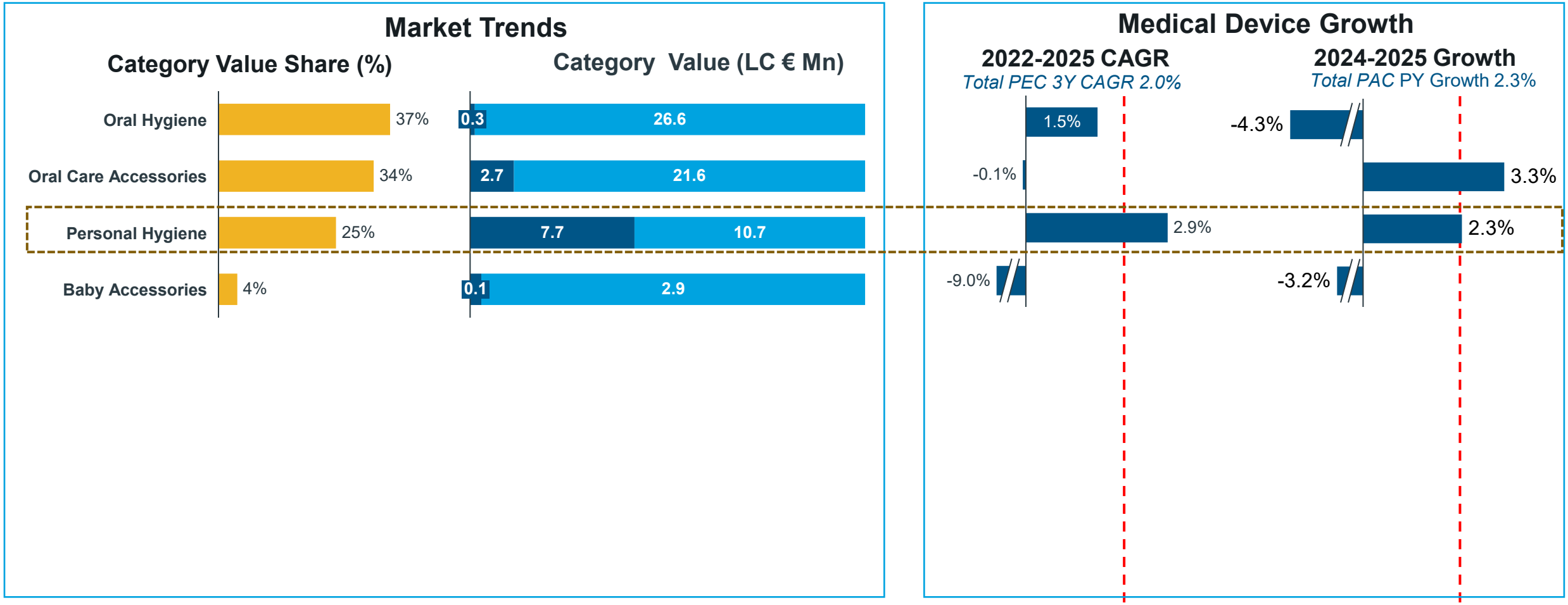
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Switzerland PEC Performance by CHC 1 Category

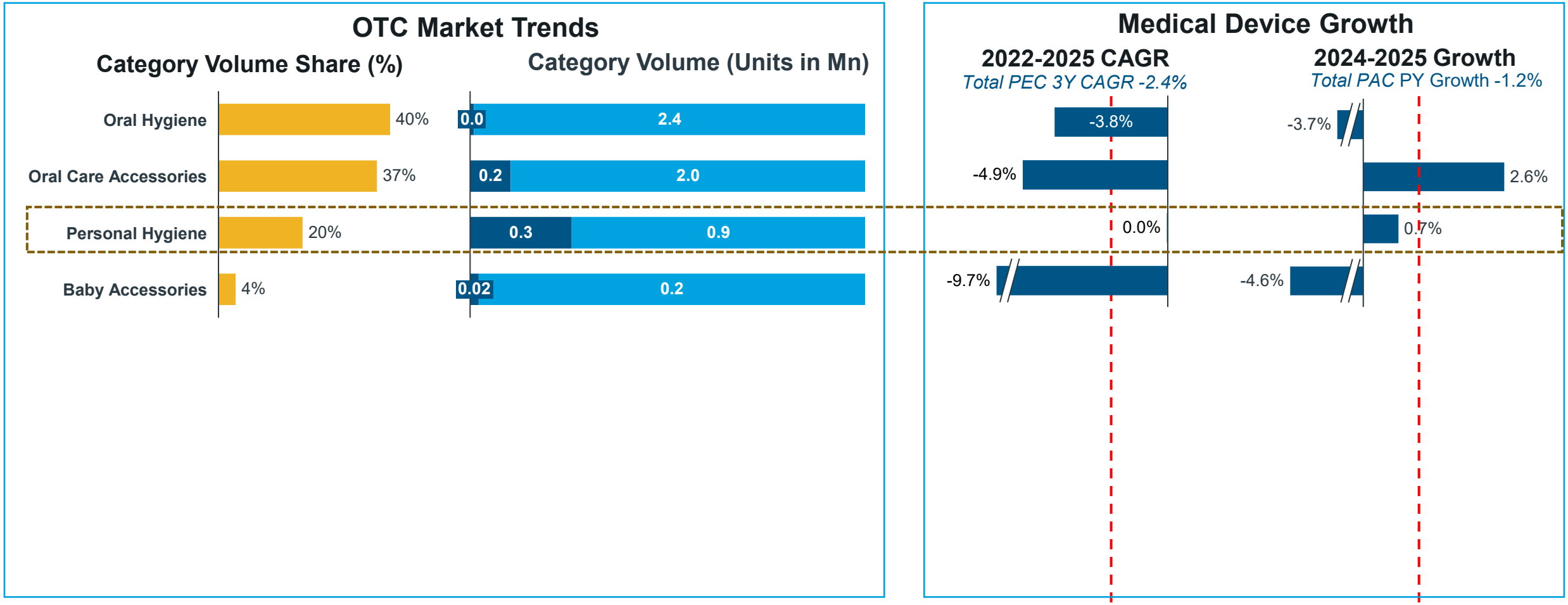
*Personal hygiene leads in sales at **€7.7Mn**, outperforming both L-T and S-T growth benchmarks*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Switzerland PEC Performance by CHC 1 Category

Personal hygiene leads in medical device volumes as well with an overall positive growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Switzerland Medical Devices Performance by top CHC 2 Segments

Personal hygiene holds the largest value share led by the intimate hygiene segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**10.8**	
Personal Hygiene	71%	7.7	Intimate Hygiene 7.7; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Care Accessories	25%	2.7	Denture Products 2.2; Toothbrushes 0.3; Other Oral Care Acces. 0.2; Interdental Brushes 0.0
Oral Hygiene	3%	0.3	Toothpastes 0.1; Mouthwashes 0.1; Other Oral Care 0.1
Baby Accessories	1%	0.1	Dummies/Pacifiers/Teeth 0.1; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Switzerland Medical Devices Performance by top CHC 2 Segments

Intimate hygiene in the personal hygiene segment leads in volume as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.6**	
Personal Hygiene	54%	0.3	Intimate Hygiene 0.3; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Care Accessories	41%	0.2	Denture Products 0.2; Toothbrushes 0.0; Other Oral Care Acces. 0.0; Interdental Brushes 0.0
Oral Hygiene	4%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	1%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Romania Medical Devices – Market Dynamics

Romania Medical Devices Performance Overview

Medical devices has been growing L-T at 15.5% by value; currently valued at €0.39 Mn in 2025

23%

Medical device share of total CH value in 2025

Long –term Growth

15.5% by value

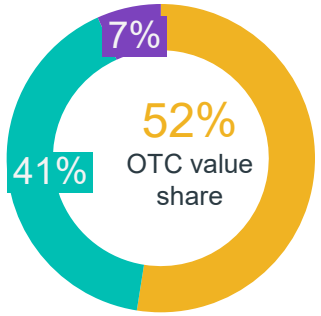
8.5% by volume

Short –term Growth

14.8% by value

9.9% by volume

Medical Devices – €392 Mn (2025)



Long-term Growth (Value)

14.6% OTC | **15.3%** PAC | **25.1%** PEC

Medical Devices Categories

29%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **72%** of new pack launches

Medical Devices Innovation

CCR

39% *Share for total OTC value in 2025, Dominated by **Sore throat***

Long-term Growth

11.5% by value

OTC (Over-the-Counter)

Test Instruments

39% Share of total PAC values in 2025; Dominated by **Gluc measuring**

Long-term Growth

5% by value

PAC (Patient care)

Oral Care Accessories

89% *Share of total PEC value share in 2022; Dominated by **Denture products***

Long term Growth

24.7% by value

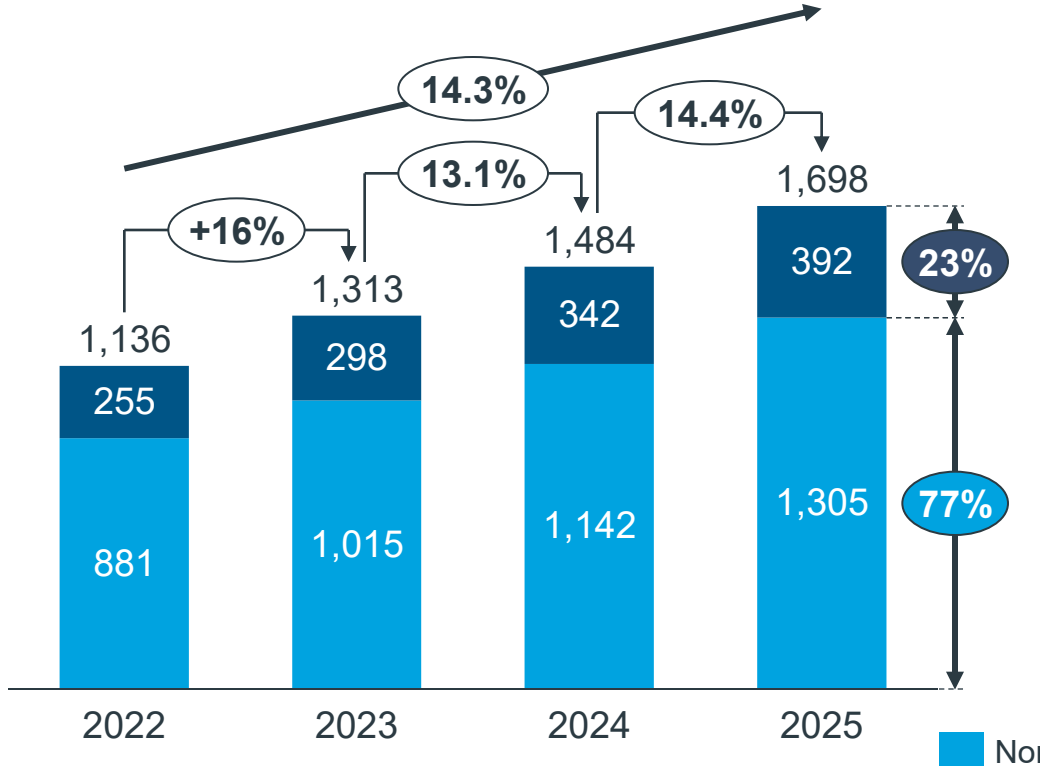
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

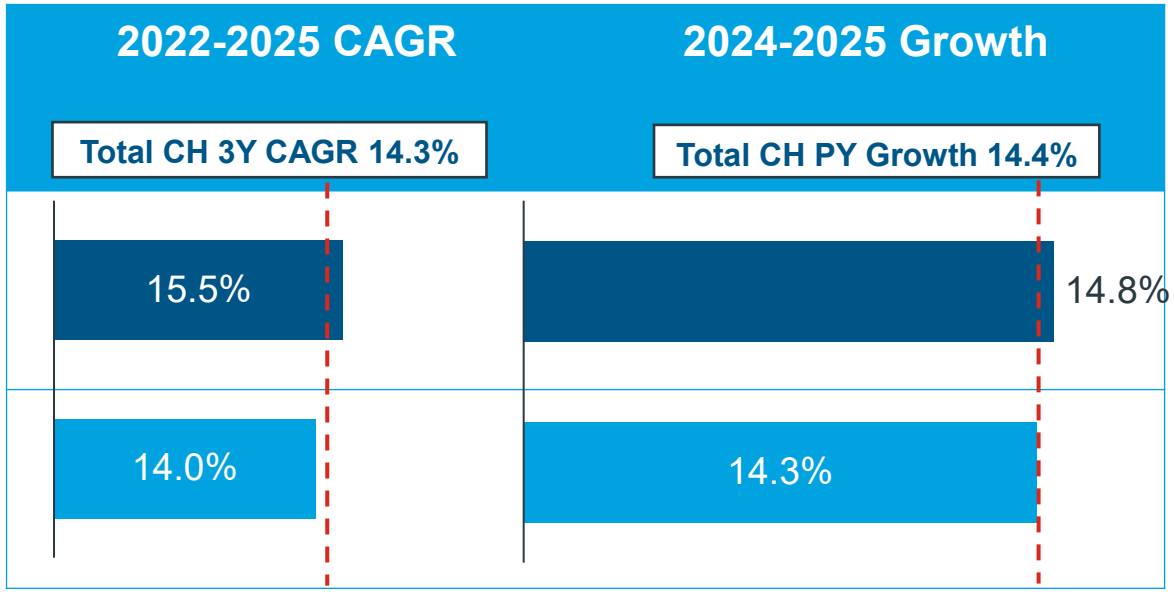
Romania CH Market Size & Growth

The CH market has grown by 14.3% between 2022 and 2025, with medical devices making up 23% of the market

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

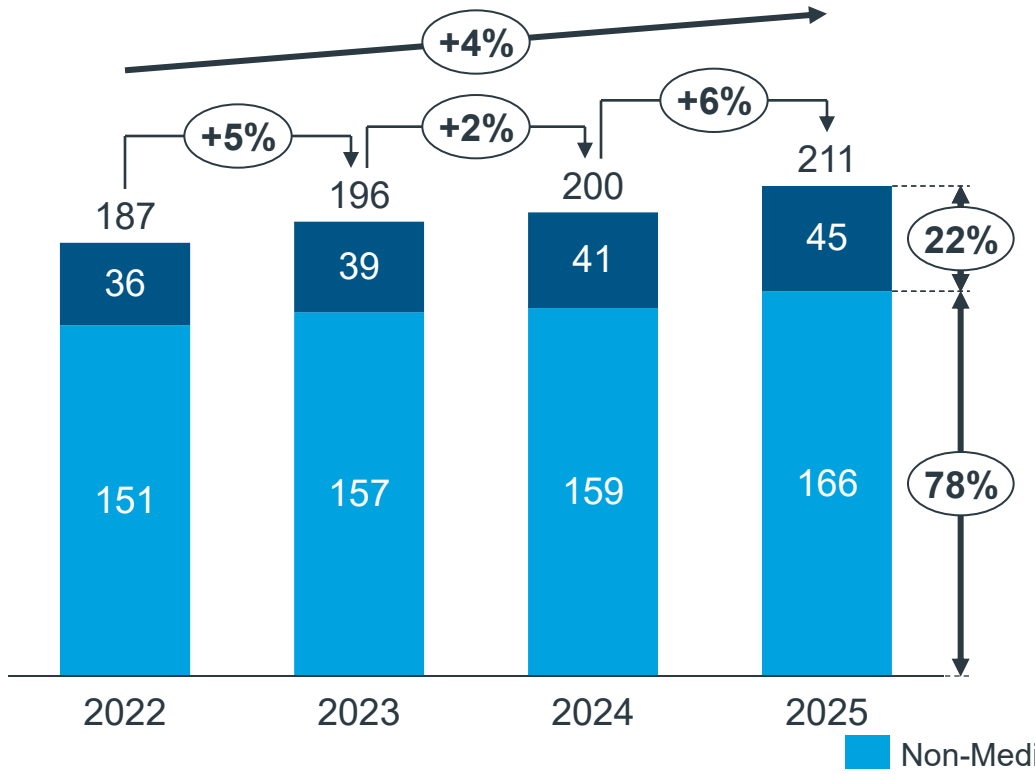


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

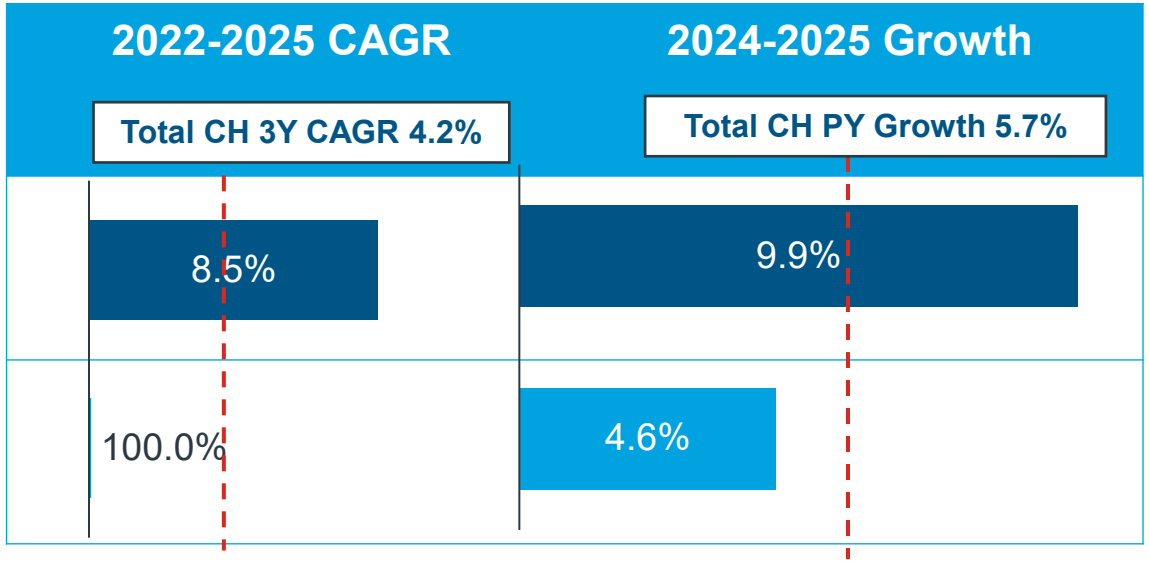
Romania CH Market Volume & Growth

Medical devices account for 22% of the CH market volume, while overall market has grown by 4% in terms of volume between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



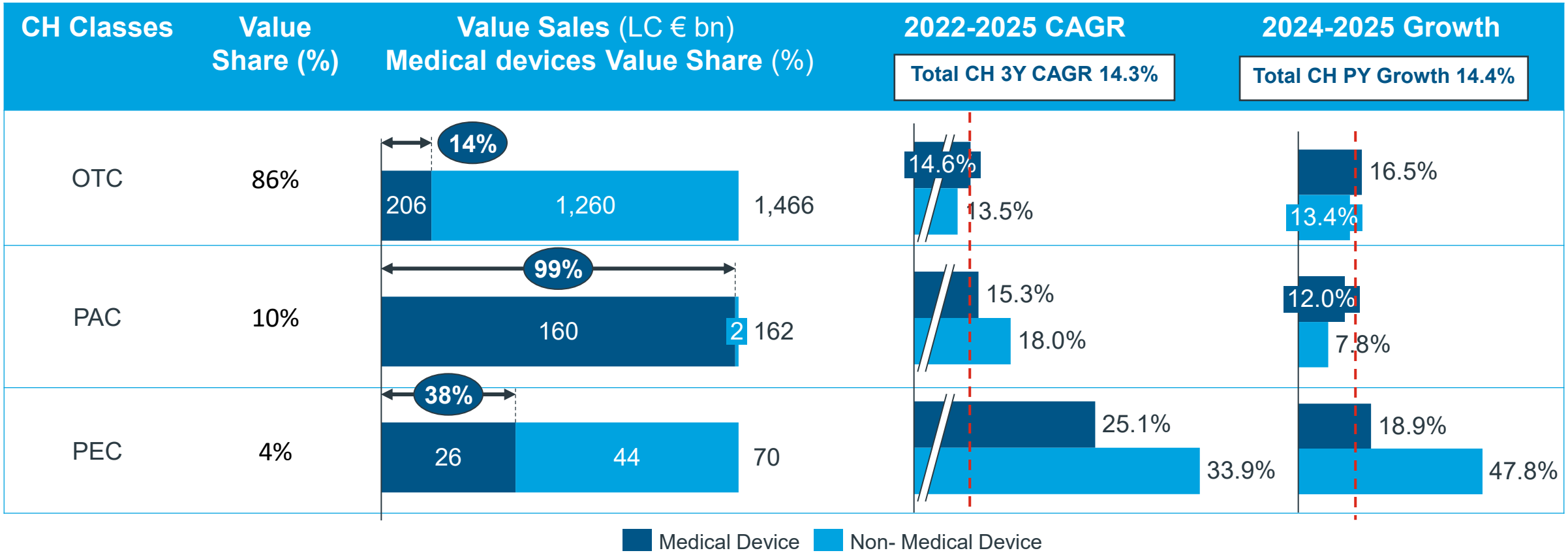
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Romania CH Performance by Classes

*OTC leads with **€206 Mn** in medical device sales and positive growth, while patient care contributes highest (99%) in the medical devices segment*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Romania CH Performance by Classes

Over the counter and Patient Care lead in medical device volume sales with 22 Mn units each; medical devices segment holds the highest volume share (99%) within PAC

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR (Total CH 3Y CAGR 4.2%)	2024-2025 Growth (Total CH PY Growth 5.7%)
OTC	84%	13%; 22 / 156 / 178	3.6% / 2.5%	6.7% / 3.8%
PAC	11%	99%; 22 / 0 / 22	14.2% / 8.7%	13.1% / 6.6%
PEC	5%	8%; 1 / 10 / 11	17.1% / 16.1%	17.7% / 17.3%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Romania Medical Devices Packs & New Launches

The majority of the Medical devices new launches come from Patient Care category in last 3 years

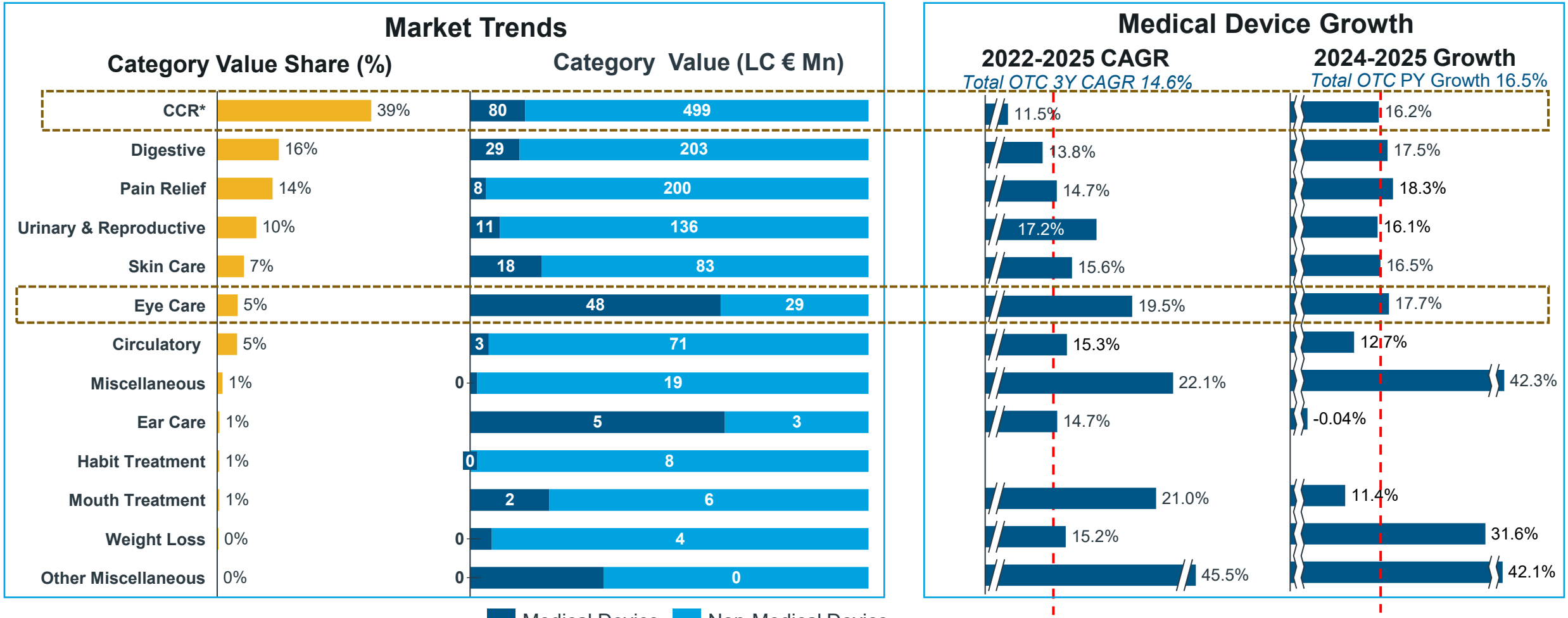
Category	Total Packs*			New Launches**		
CH Total	2,013	4,302	**6,315**	790	1,931	**2,721**
OTC	507	3,014	**3,521**	187	1,269	**1,456**
Patient Care	1,432	156	**1,588**	568	64	**632**
Personal Care	74	1,132	**1,206**	35	598	**633**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Romania OTC Performance by CHC 1 Category in 2025

*CCR leads in total medical devices value sales at **€80 Mn,** followed by Eye care at **€48 Mn***

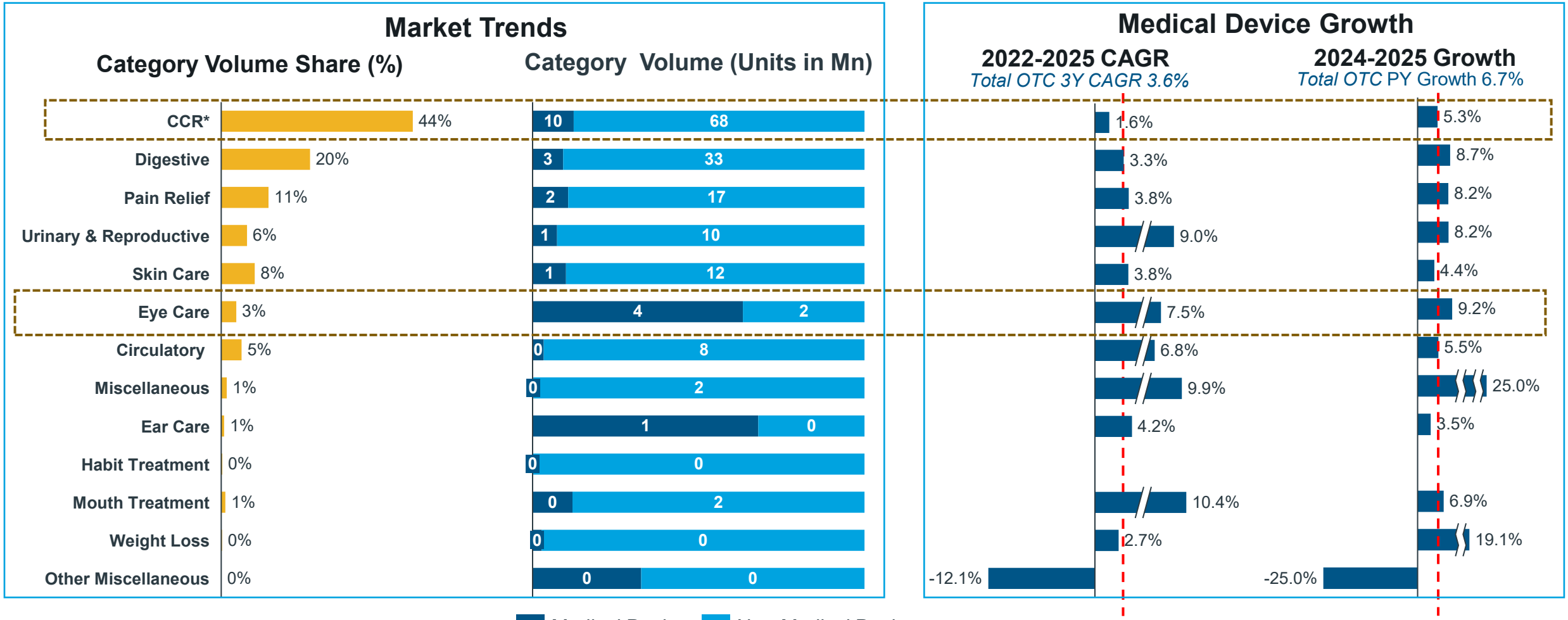


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Romania OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device sales in terms of volume share, followed by eye care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Romania Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~95% of values; led by Sore throat in CCR product segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**205.9**	
CCR	39%	80.2	Sore Throat 25.0; Nasal Saline 19.8; Other Respiratory 16.1; Cough 13.7
Eye Care	24%	48.4	Not available
Digestive	14%	28.7	Digestive 10.3; Laxatives 8.7; Acid & Heartburn 7.1; Antidiarrhoeals 2.6
Skin Care	9%	18.0	Wound Healing 7.5; Skin Protector/Emollients 3.3; Antifungals 2.5; Hand Skin Wound Disinfect 1.7
Urinary & Reproductive	5%	11.0	Gynaecological 10.0; Urinary Condition 0.9; Urology 0.1; Male Condition 0.0
Pain Relief	4%	8.3	Muscular Pain 4.8; Mouth Pain 3.5; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Romania Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	5.5	Not available
Circulatory	2%	3.5	Antihemorrhoids 3.3; Chloesterol Regulating 0.0; Other Circulatory 0.1
Mouth Treatment	1%	1.5	Other Mouth Treatment 1.2; Mouth Infection 0.0; Fluoride Products 0.3
Miscellaneous	0%	0.4	Not available
Weight Loss	0%	0.2	Not available
Other Miscellaneous	0%	0.2	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Romania Medical Devices Performance by top CHC 2 Segments

CCR makes up about 43% of all volume sales of medical devices

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**22.4**	
CCR	43%	9.7	Sore Throat 3.5; Nasal Saline 2.5; Other Respiratory 1.7; Cough 1.3
Eye Care	17%	3.9	Not available
Digestive	15%	3.3	Digestive 1.5; Laxatives 1.0; Acid & Heartburn 0.5; Antidiarrhoeals 0.3
Skin Care	6%	1.4	Wound Healing 0.5; Skin Protector/Emollients 0.3; Hand Skin Wound Disinfect; Antifungals 0.2; 0.1
Urinary & Reproductive	3%	0.8	Gynaecological 0.7; Urinary Condition 0.0; Urology; Male Condition 0.0
Pain Relief	9%	2.1	Muscular Pain 1.5; Mouth Pain 0.6; Joint Care; Dysmenorrhea 0.0; 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Romania Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	4%	0.8	Not available
Circulatory	1%	0.3	Antihemorrhoids 0.3; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.2	Other Mouth Treatment 0.1; Mouth Infection 0.1; Fluoride Products 0.0
Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

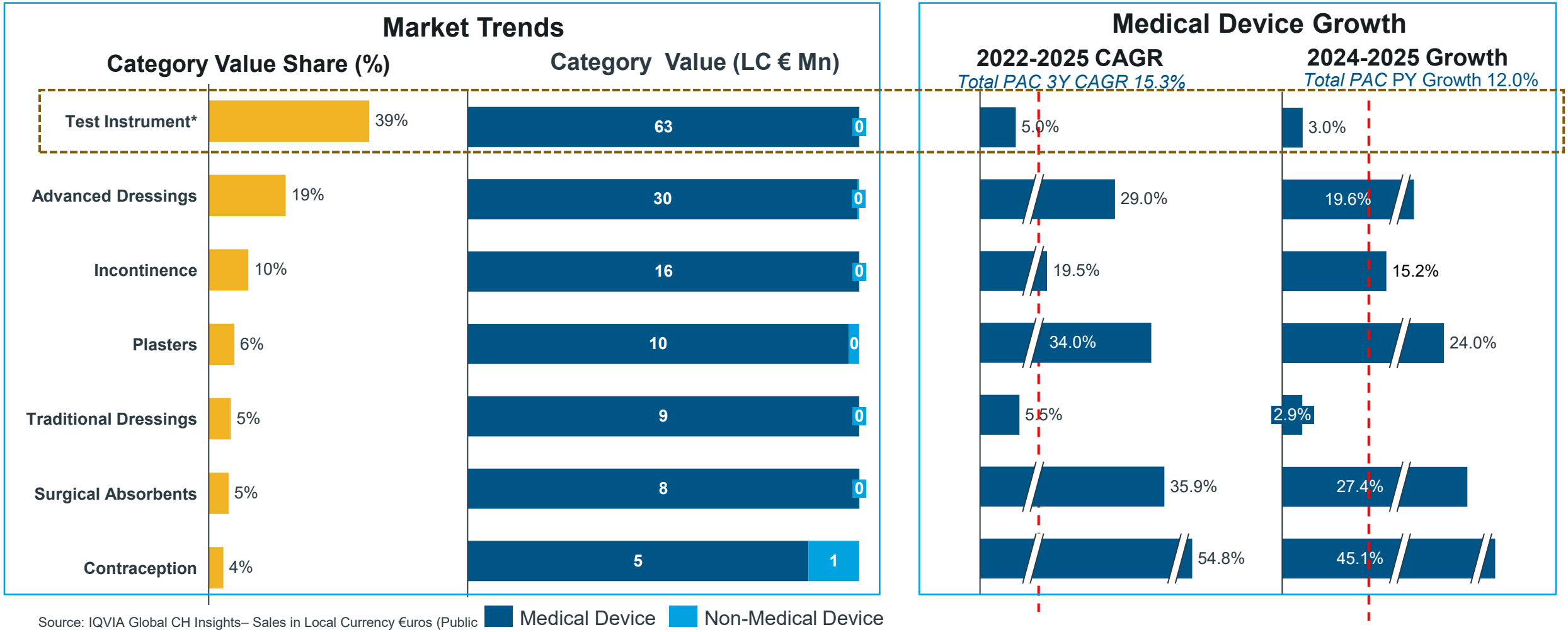
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Romania PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instrument leads medical devices values with **€63 Mn** sales*



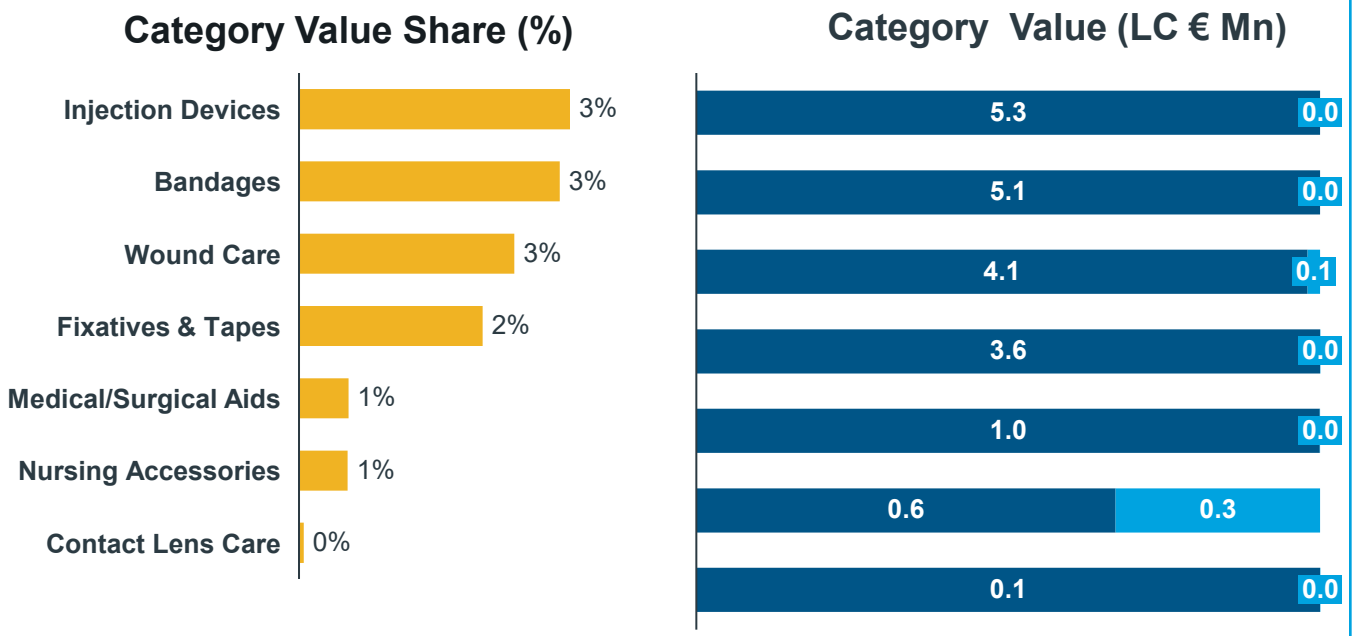
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

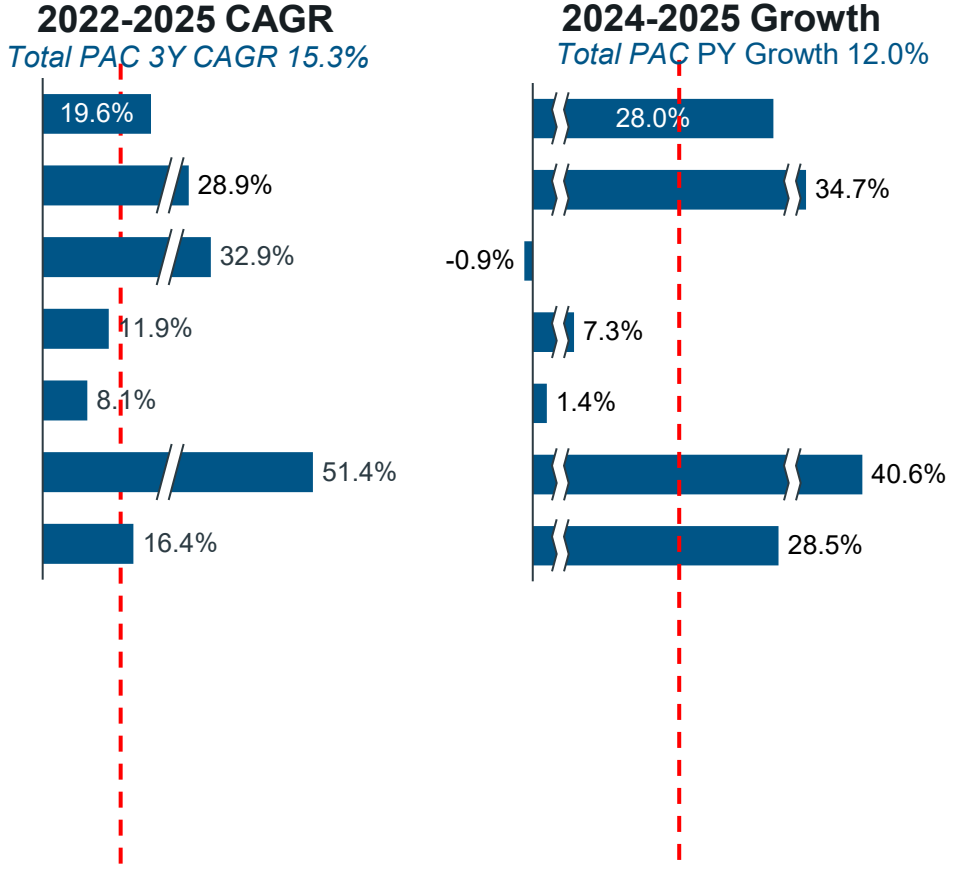
Romania PAC Performance by CHC 1 Category in 2025 (2/2)

Most other categories lead to both S-T and L-T value growth in the medical devices segment

Market Trends



Medical Device Growth



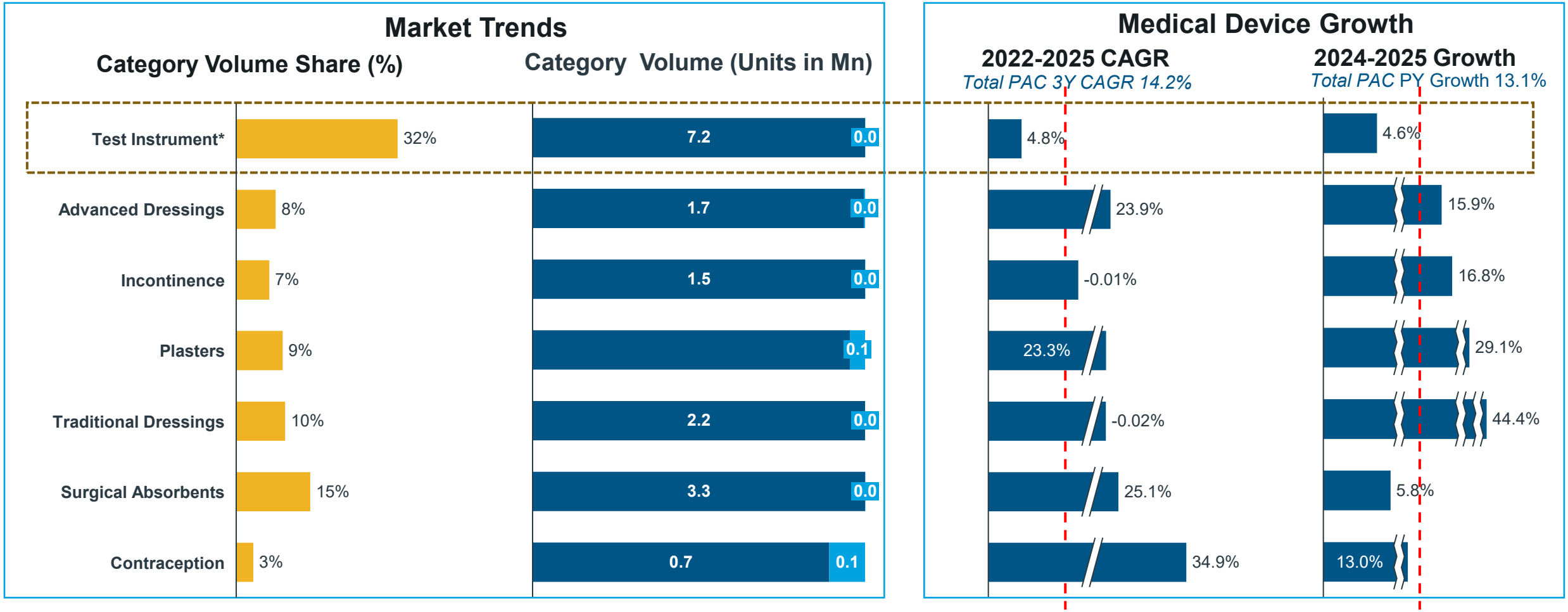
Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Romania PAC Performance by CHC 1 Category (1/2)

Test Instruments hold the highest volume share in medical devices segment as well

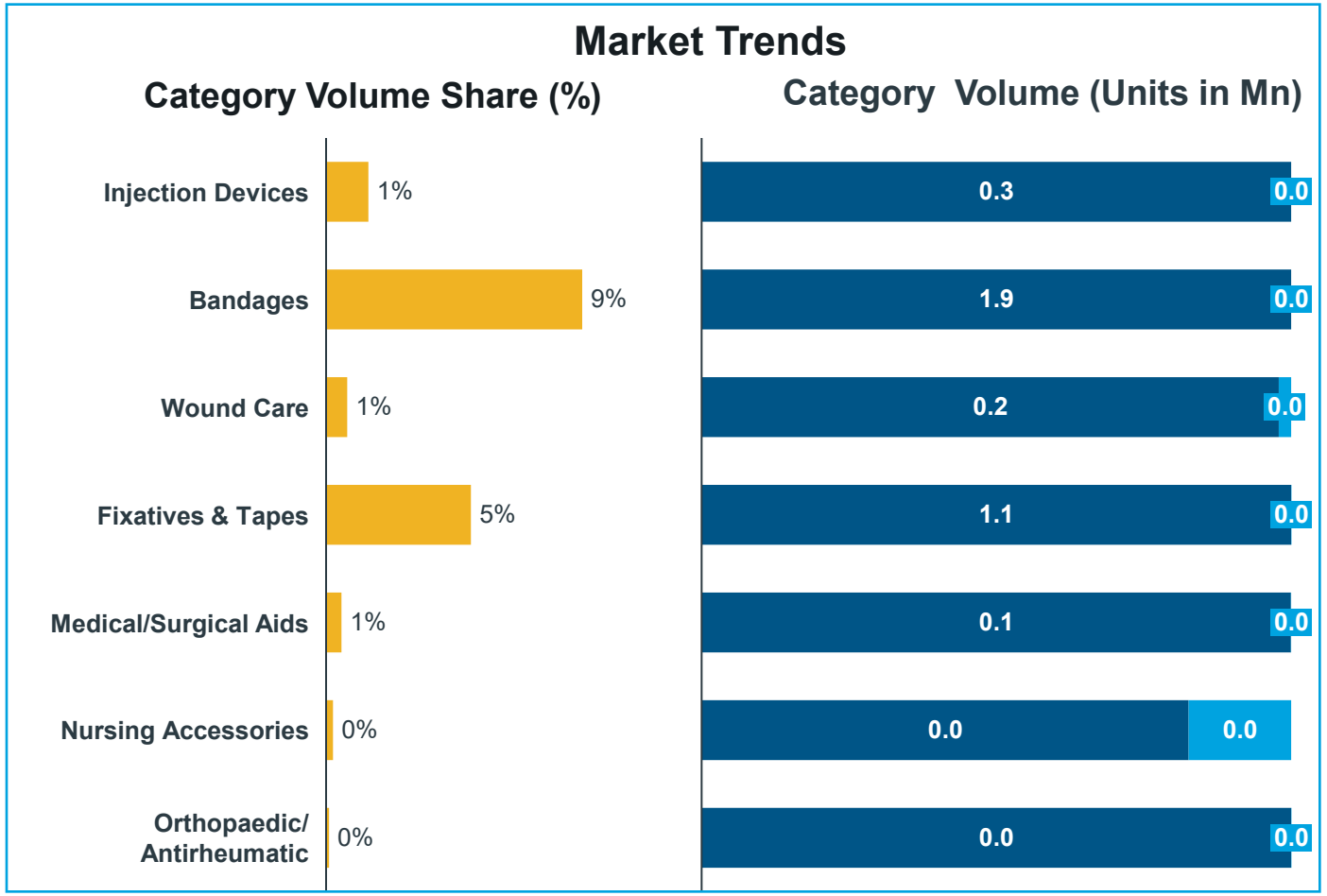


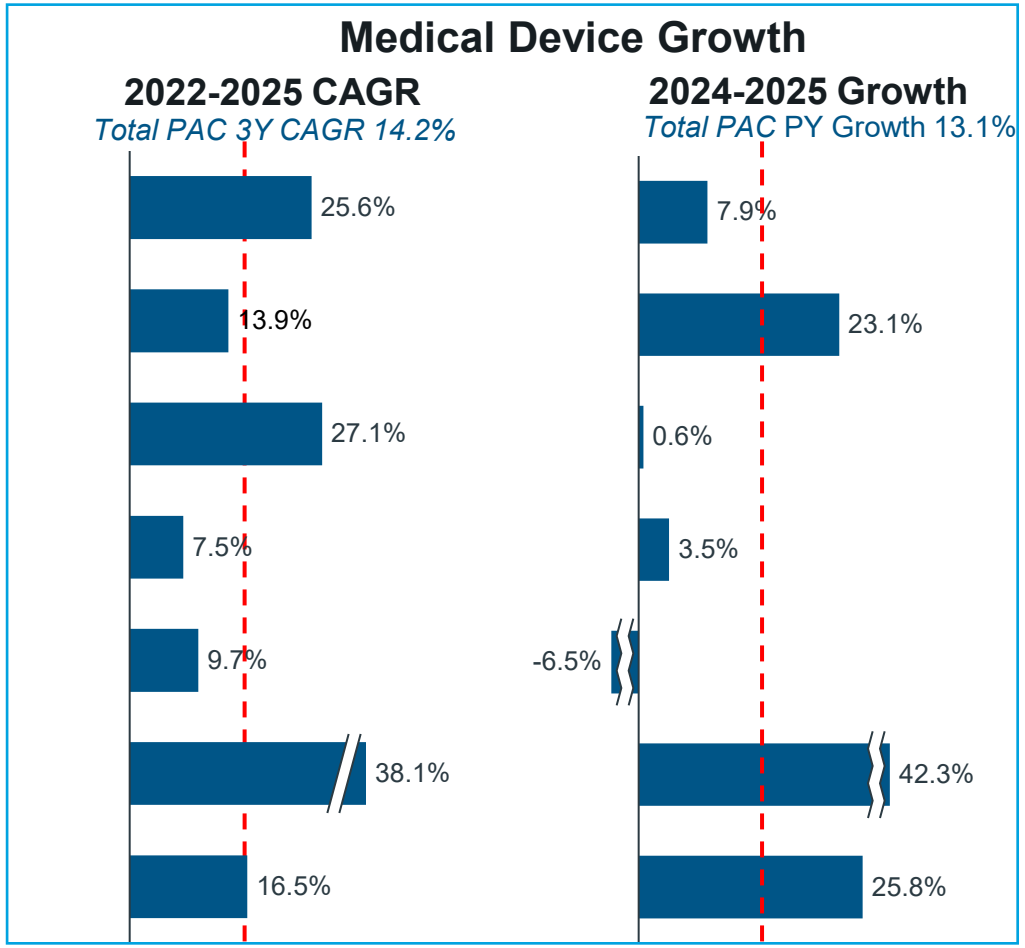
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Romania PAC Performance by CHC 1 Category (2/2)

Most small categories show both S-T and L-T growth in terms of volume as well





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Romania Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 80% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**160.0**	
Test Instrument	39%	63.2	Gluc Measuring 45.6; Blood Press Monitors 7.4; Pregnancy Test 6.0; Thermometers 2.8
Advanced Dressings	19%	30.1	Hyaluron 25.2; Base Tech 3.3; Anti-Infection 1.6
Incontinence	10%	15.6	Mod Heav Sev Incont. 12.3; Light Incontinence 1.7; Bed Sheets/Pads 1.7
Plasters	6%	9.8	Special Plaster 6.2; Plaster Strip 3.0; Liquid Plaster 0.5; Plaster Spec. Uses 0.1
Traditional Dressings	5%	8.7	Not available
Surgical Absorbents	5%	7.8	Packs & Patches 5.9; Swabs & Pads 1.9

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Romania Medical Devices Performance by top CHC 2 Segments

Gluc measuring under Test Instrument lead in medical device volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**22.1**	
Test Instrument	32%	7.2	Gluc Measuring 4.1; Pregnancy Test 1.7; Lancets+Sampling 0.8; Thermometers 0.3
Advanced Dressings	8%	1.7	Hyaluron 1.6; Base Tech 0.1; Anti-Infection 0.1
Incontinence	7%	1.5	Mod Heav Sev Incont. 0.9; Light Incontinence 0.4; Bed Sheets/Pads 0.2
Plasters	9%	2.0	Plaster Strip 1.2; Special Plaster 0.7; Liquid Plaster 0.1; Plaster Spec. Uses 0.0
Traditional Dressings	10%	2.2	Not available
Surgical Absorbents	15%	3.3	Packs & Patches 2.9; Swabs & Pads 0.3

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

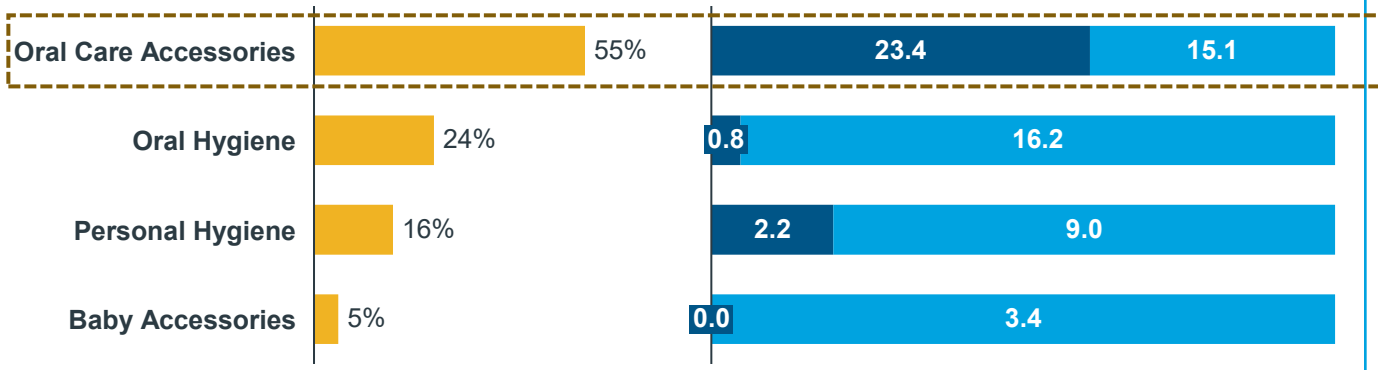
Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

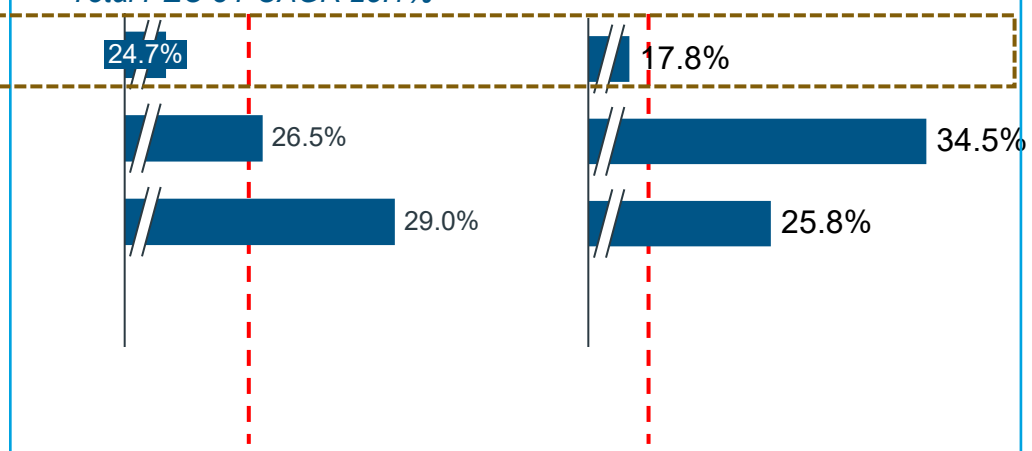
Romania PEC Performance by CHC 1 Category

Oral care accessories leads medical devices values; showing positive growth in L-T & S-T

Market Trends



Medical Device Growth

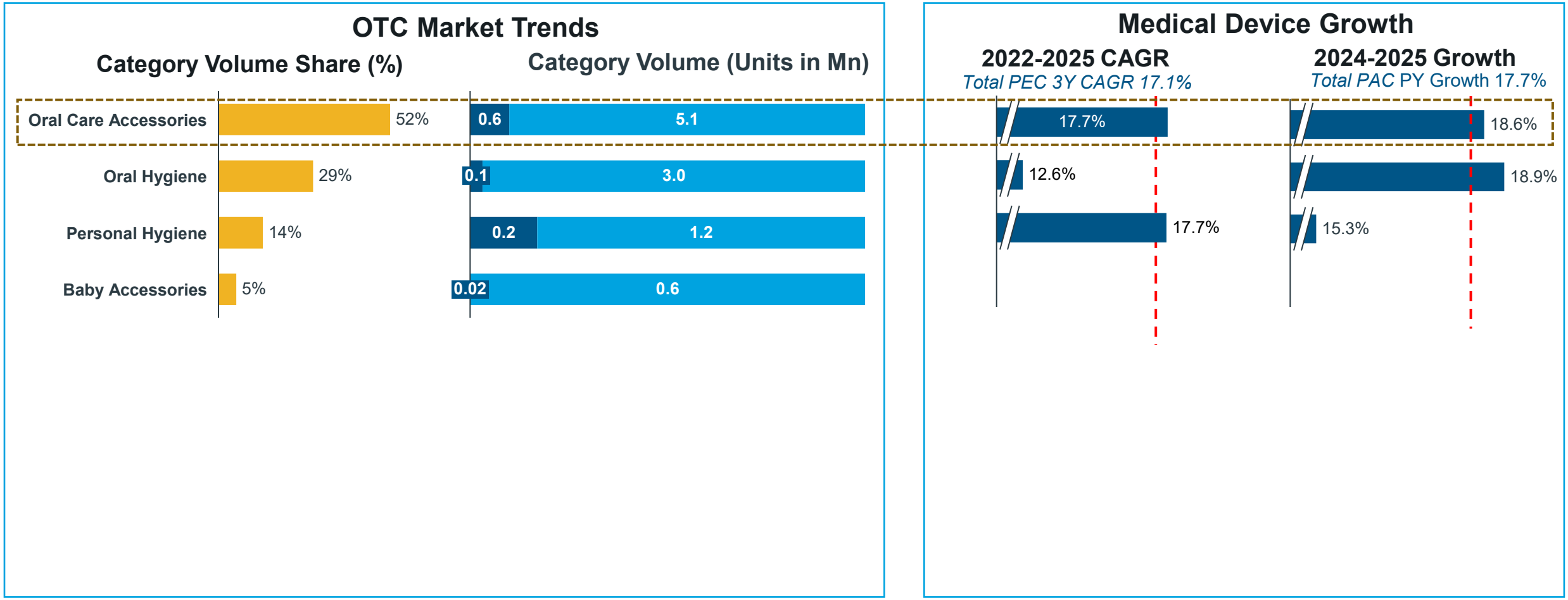


Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Romania PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes within the medical devices segment as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Romania Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**26.3**	
Oral Care Accessories	89%	23.4	Denture Products 21.8; Toothbrushes 1.5; Dental Floss 0.0; Interdental Brushes 0.0
Personal Hygiene	8%	2.2	Intimate Hygiene 2.2; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	3%	0.8	Toothpastes 0.5; Mouthwashes 0.3; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Romania Medical Devices Performance by top CHC 2 Segments

Oral Care Accessories share the largest volume of medical devices as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.9**	
Oral Care Accessories	62%	0.6	Denture Products 0.4; Toothbrushes 0.1; Dental Floss 0.0; Interdental Brushes 0.0
Personal Hygiene	27%	0.2	Intimate Hygiene 0.2; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	11%	0.1	Toothpastes 0.1; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Norway Medical Devices – Market Dynamics

Norway Medical Devices Performance Overview

Medical devices represent over 50% of CH value share, with the PAC segment contributing 78% of the total

51%

Medical device share of total CH value in 2025

Long –term Growth

-1.8% by value

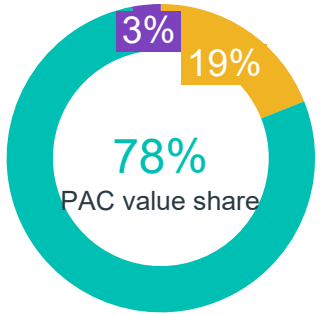
-2.7% by volume

Short –term Growth

5.2% by value

1.3% by volume

Medical Devices – €323 Mn (2025)



Long-term Growth (Value)

-3.6%	6.1%	4.7%
PAC	OTC	PEC

Medical Devices Categories

44%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **86%** of new pack launches

Medical Devices Innovation

Incontinence

28% *Share of total PAC values in 2025; Dominated by **Mod Heav Sev Incont.***

Long-term Growth

7.8% by value

PAC (Patient care)

Eye care

37% *Share for total OTC value in 2025*

Long-term Growth

9.1% by value

OTC (Over-the-Counter)

Personal Hygiene

54% *Share of total PEC value share in 2025; Dominated by **Intimate hygiene***

Long term Growth

3.9% by value

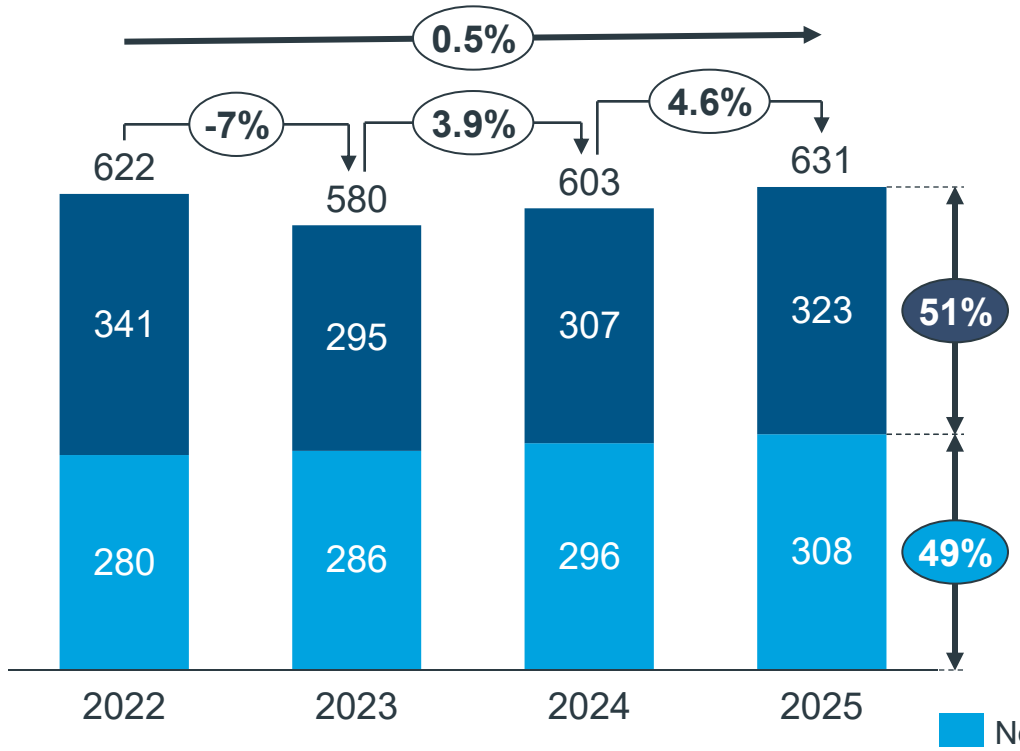
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

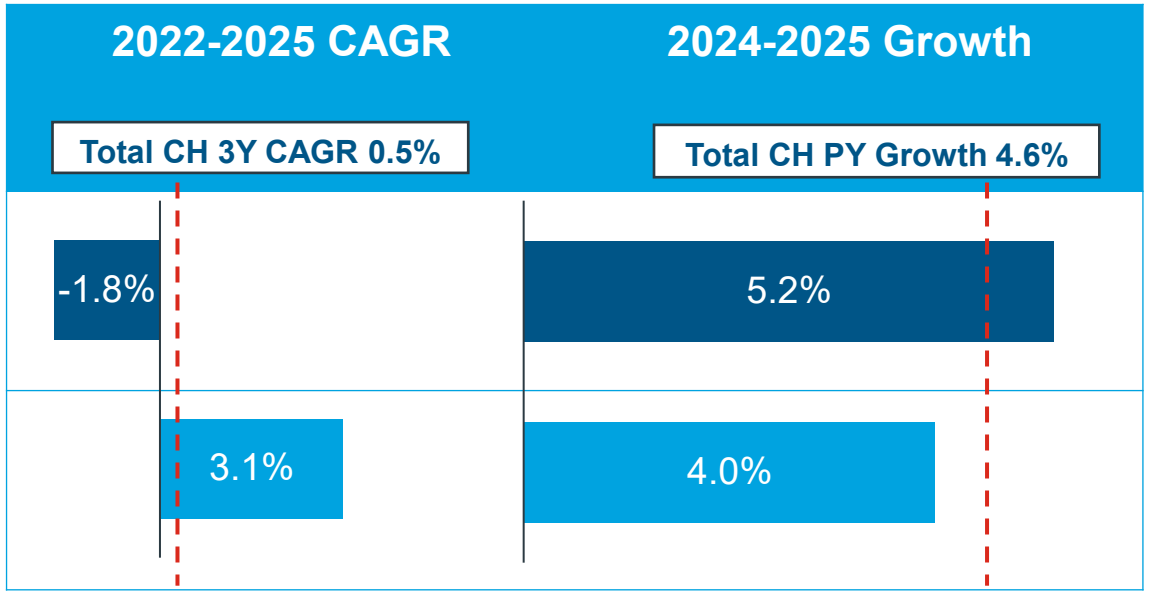
Norway CH Market Size & Growth

Growth in CH market value has remained nearly flat, with a 4.6% increase observed in the last year, 2024-2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

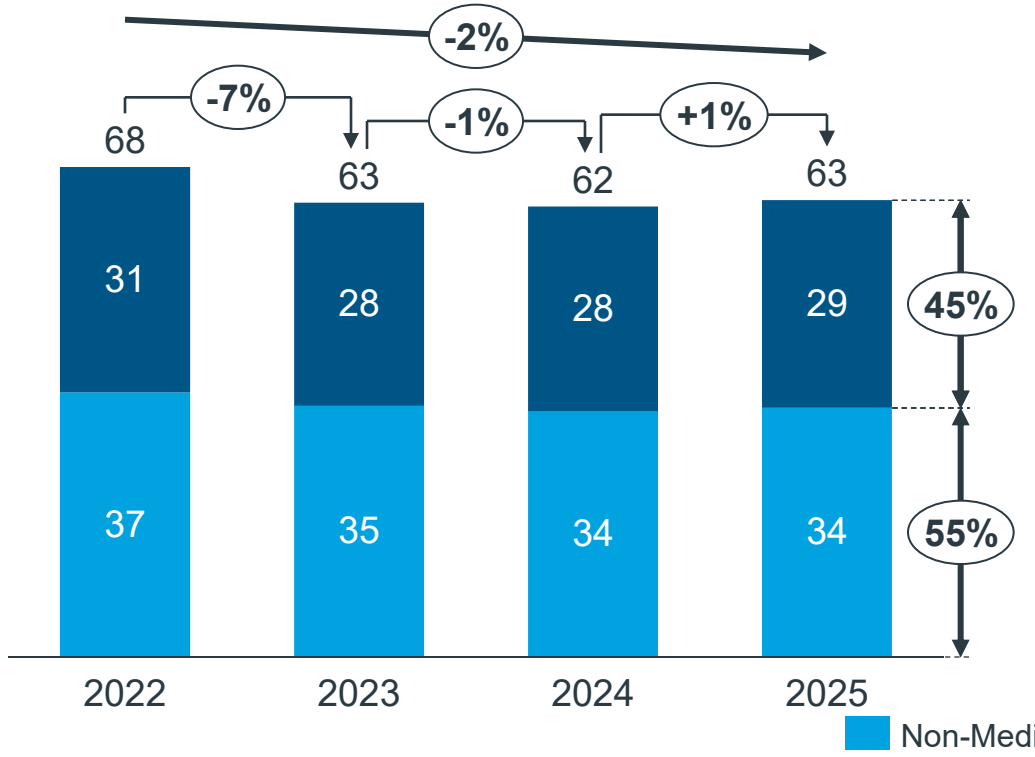


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

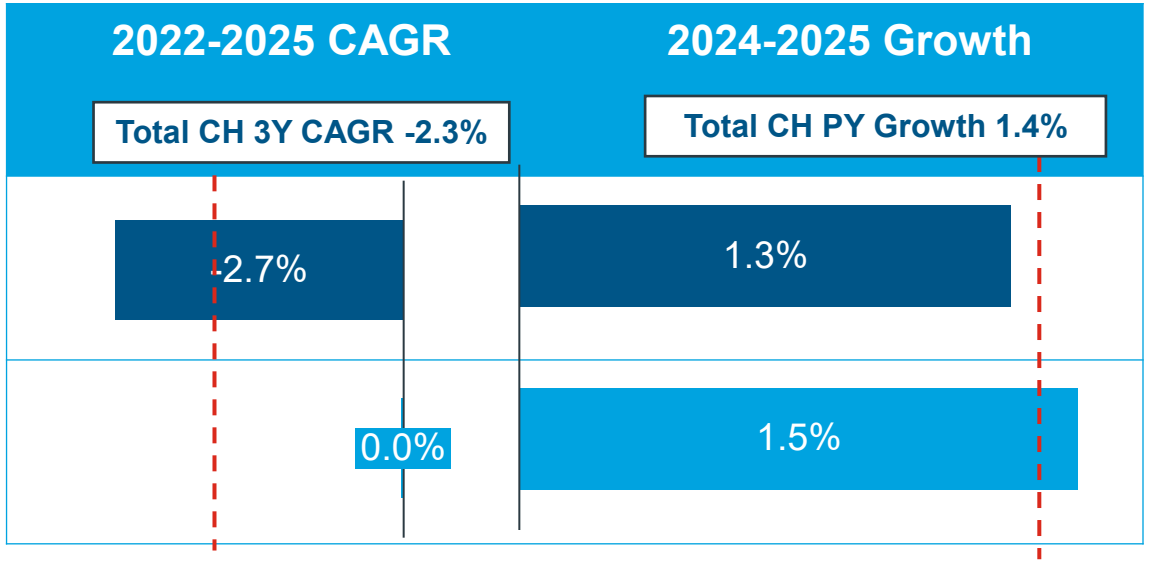
Norway CH Market Volume & Growth

Market volume has grown slightly over the past year and medical device volumes now represent 45% of the overall market

Market Volume (Mn Units), and Latest Volume Share (%)



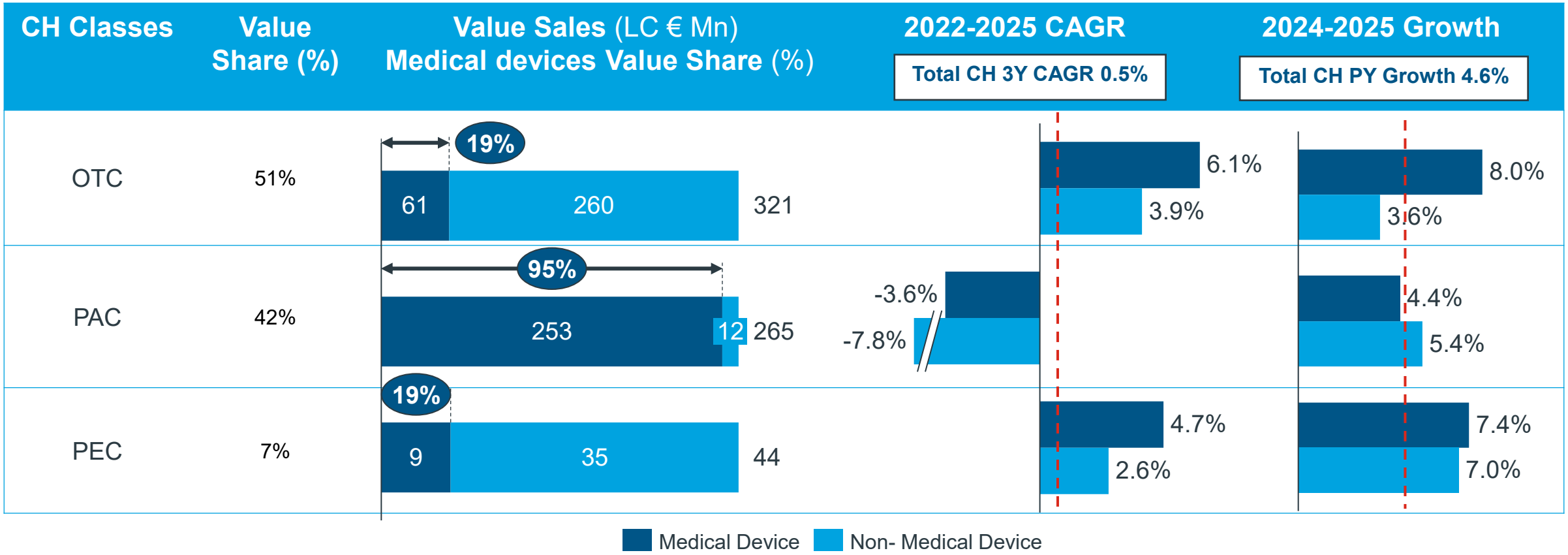
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Norway CH Performance by Classes

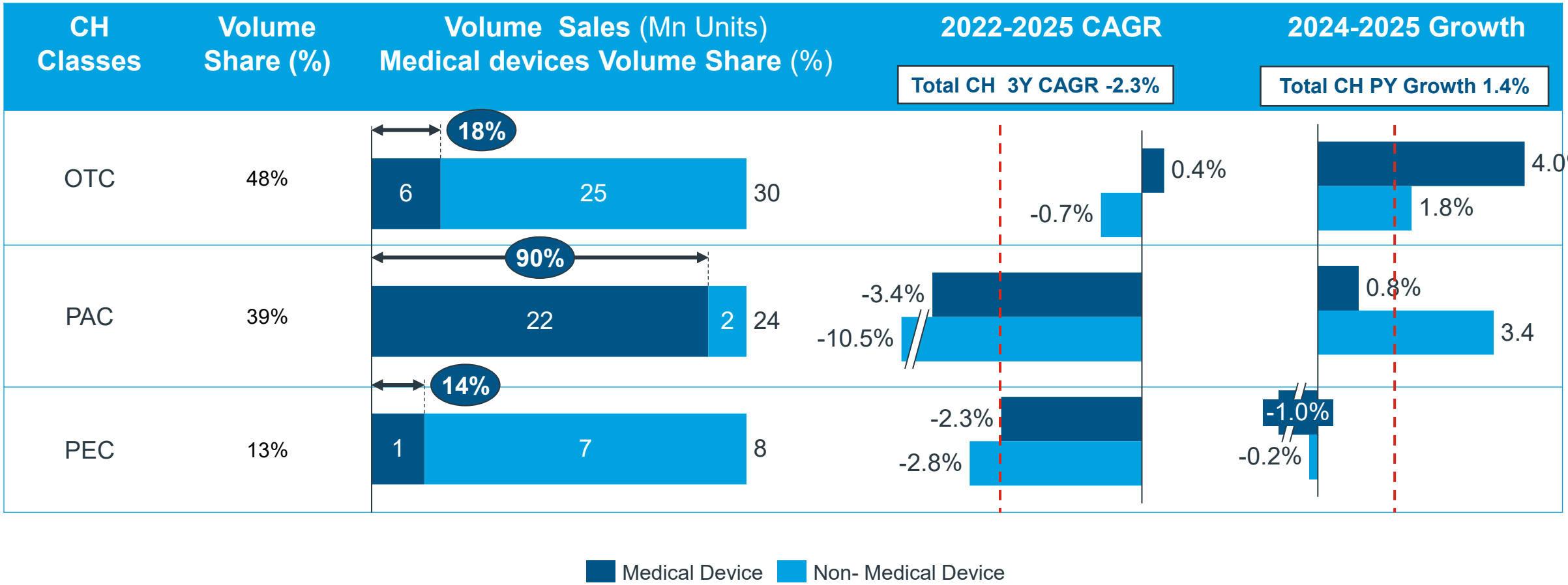
PAC segment has contributed the most to medical devices value with > € 250Mn in value sales



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Norway CH Performance by Classes

Patient Care leads in volumes as well with >20Mn units in sales



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Norway Medical Devices Packs & New Launches

Patient care medical device segments leads in both total packs and new pack launches

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device	Total	Medical Device	Non Medical Device	Total
CH Total	3,341	5,206	**8,547**	1,257	1,596	**2,853**
OTC	619	4,201	**4,820**	169	1,344	**1,513**
Patient Care	2,687	409	**3,096**	1,085	160	**1,245**
Personal Care	35	596	**631**	3	92	**95**

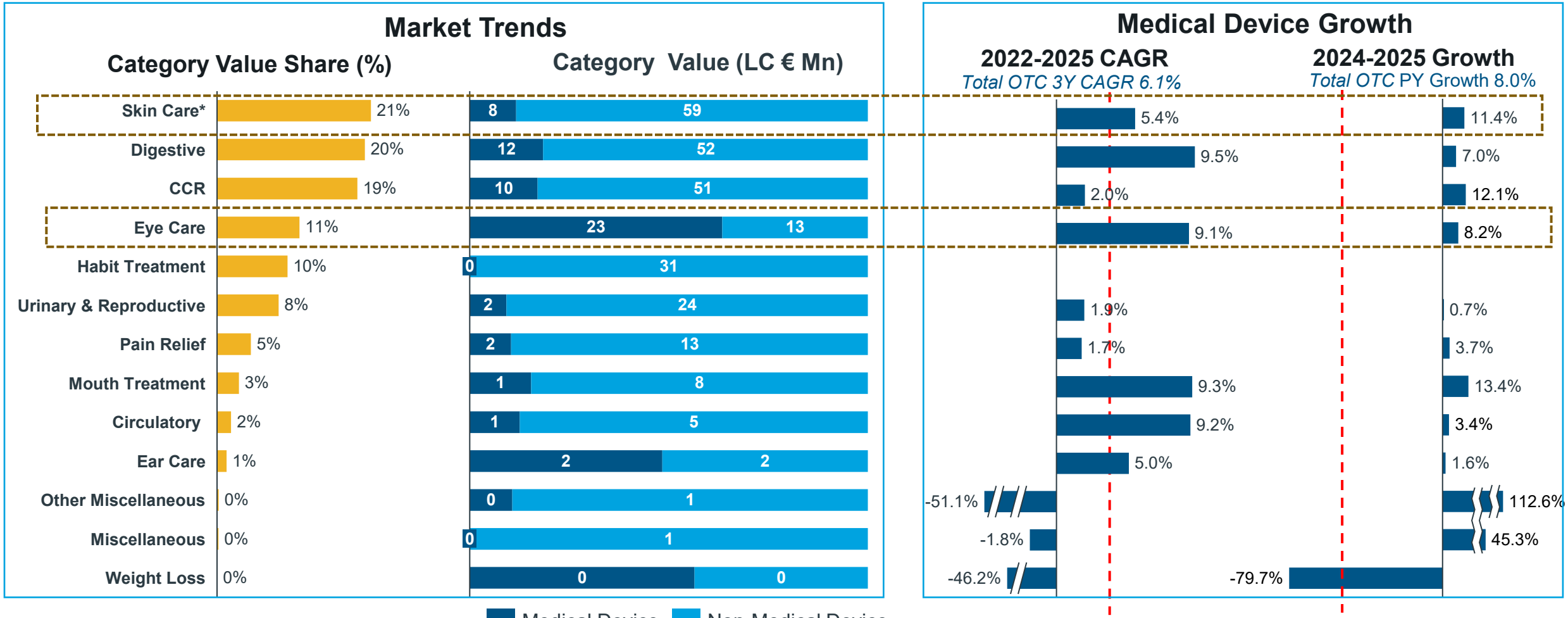
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Norway OTC Performance by CHC 1 Category in 2025

Eye care leads the medical device value sales, while the skin care category has the largest value share

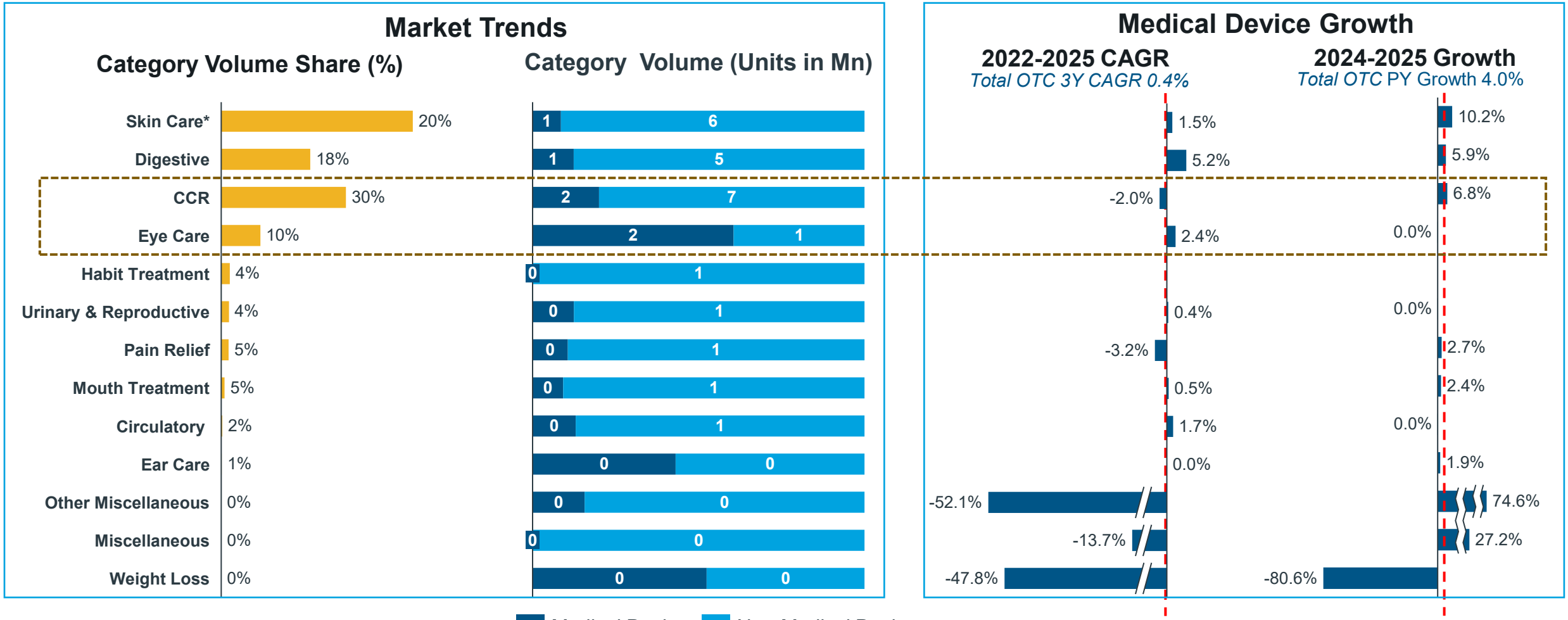


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Norway OTC Performance by CHC 1 Category in 2025

Eye care along with CCR leads in volumes



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Norway Medical Devices Performance by top CHC 2 Segments

Top 6 categories account more than 90% of total medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**61.1**	
Eye Care	37%	22.7	Not available
Digestive	19%	11.9	Laxatives 9.2; Digestive Acid & Heartburn 1.5; Antidiarrhoeals 1.0; 0.1
CCR	17%	10.4	Nasal Saline 6.6; Sore Throat 2.6; Cough 0.9; Cold Remedies 0.2
Skin Care	13%	7.8	Wart/Corn Removal 2.3; Psoriasis 2.0; Skin Protector/Emollients 1.9; Hand Skin Wound Disinfect 0.9
Urinary & Reproductive	4%	2.5	Gynaecological 1.8; Urinary Condition 0.4; Urology Male Condition 0.2
Ear Care	3%	2.0	Not available

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Norway Medical Devices Performance by top CHC 2 Segments

Muscular pain and mouth treatment products stand out in smaller categories

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Pain Relief	3%	1.5	Muscular Pain 1.4; Mouth Pain 0.1; Dysmenorrhea 0.0; Joint Care 0.0
Mouth Treatment	2%	1.5	Other Mouth Treatment 1.4; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.8	Antihemorrhoids 0.8; Chloesterol Regulating 0.0
Other Miscellaneous	0%	0.1	Not available
Weight Loss	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Norway Medical Devices Performance by top CHC 2 Segments

Nasal saline leads within the CHC 2 segments

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**5.6**	
Eye Care	33%	1.9	Not available
Digestive	12%	0.7	Laxatives 0.5; Acid & Heartburn 0.1; Digestive 0.1; Antidiarrhoeals 0.0
CCR	33%	1.9	Nasal Saline 1.3; Sore Throat 0.5; Cough 0.1; Cold Remedies 0.0
Skin Care	10%	0.5	Psoriasis 0.2; Wart/Corn Removal 0.1; Skin Protector/Emollients 0.1; Hand Skin Wound Disinfect 0.1
Urinary & Reproductive	3%	0.2	Gynaecological 0.1; Urinary Condition 0.0; Urology Male Condition 0.0
Ear Care	3%	0.2	Not available

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Norway Medical Devices Performance by top CHC 2 Segments

Smaller categories includes pain relief and mouth treatment products

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Pain Relief	3%	0.2	Muscular Pain 0.1; Mouth Pain 0.0; Dysmenorrhea 0.0; Joint Care 0.0
Mouth Treatment	2%	0.1	Other Mouth Treatment 0.1; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0
Other Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

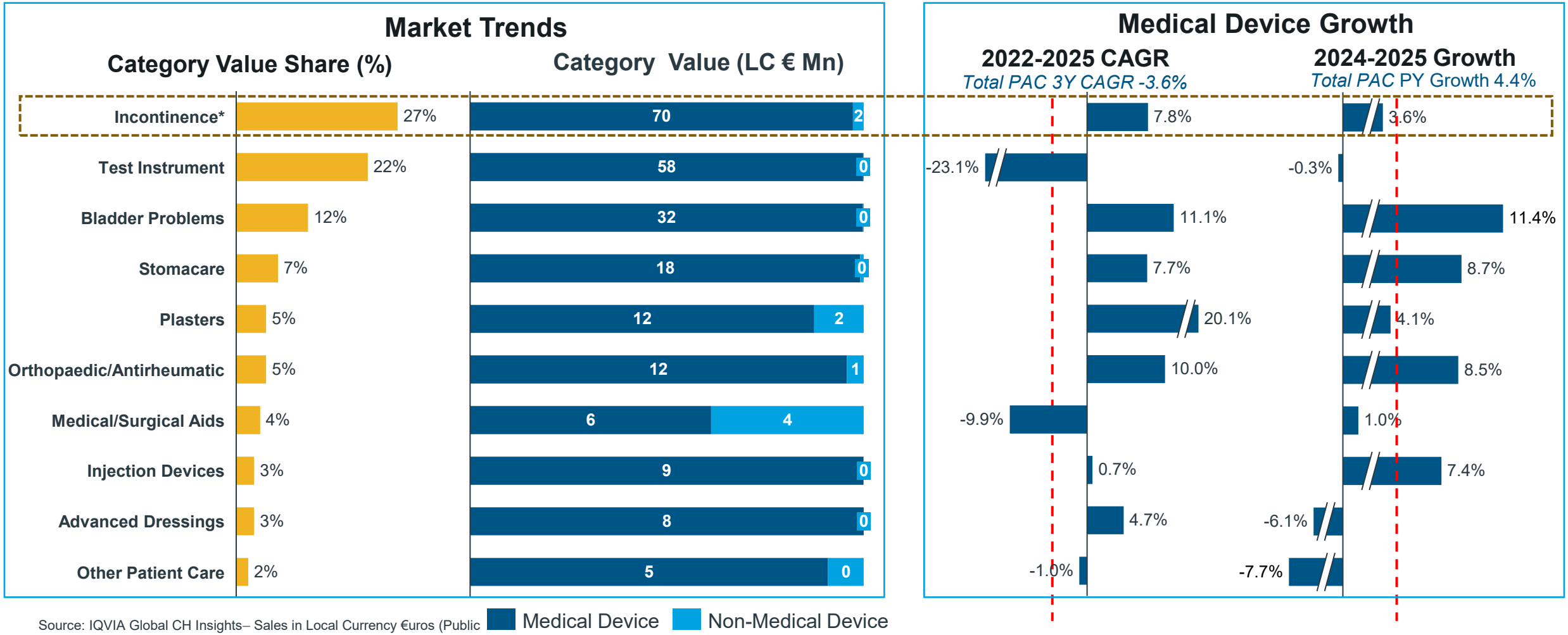
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Norway PAC Performance by CHC 1 Category in 2025 (1/2)

*Incontinence occupies the highest value share with **€ 70Mn** in medical device values*

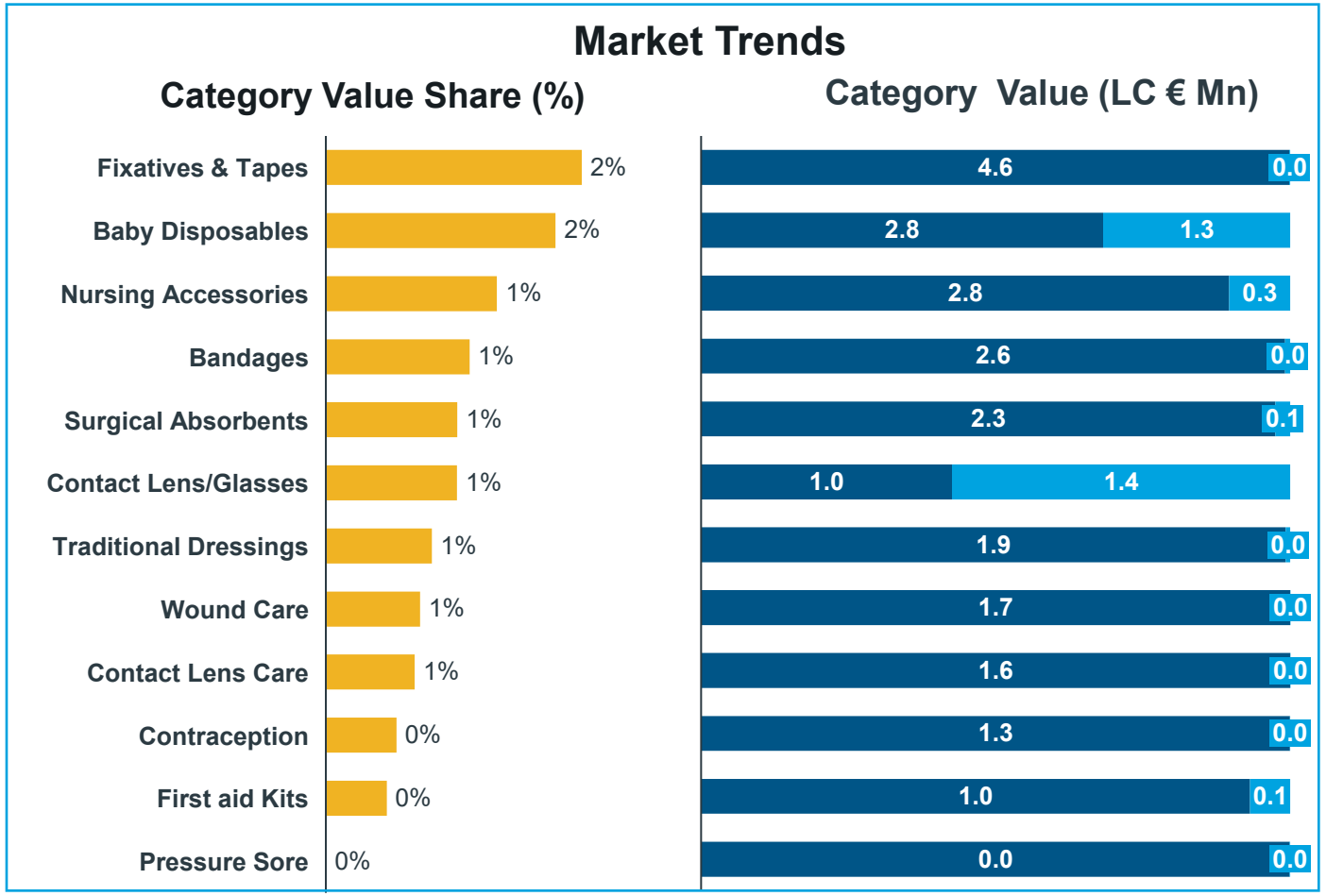


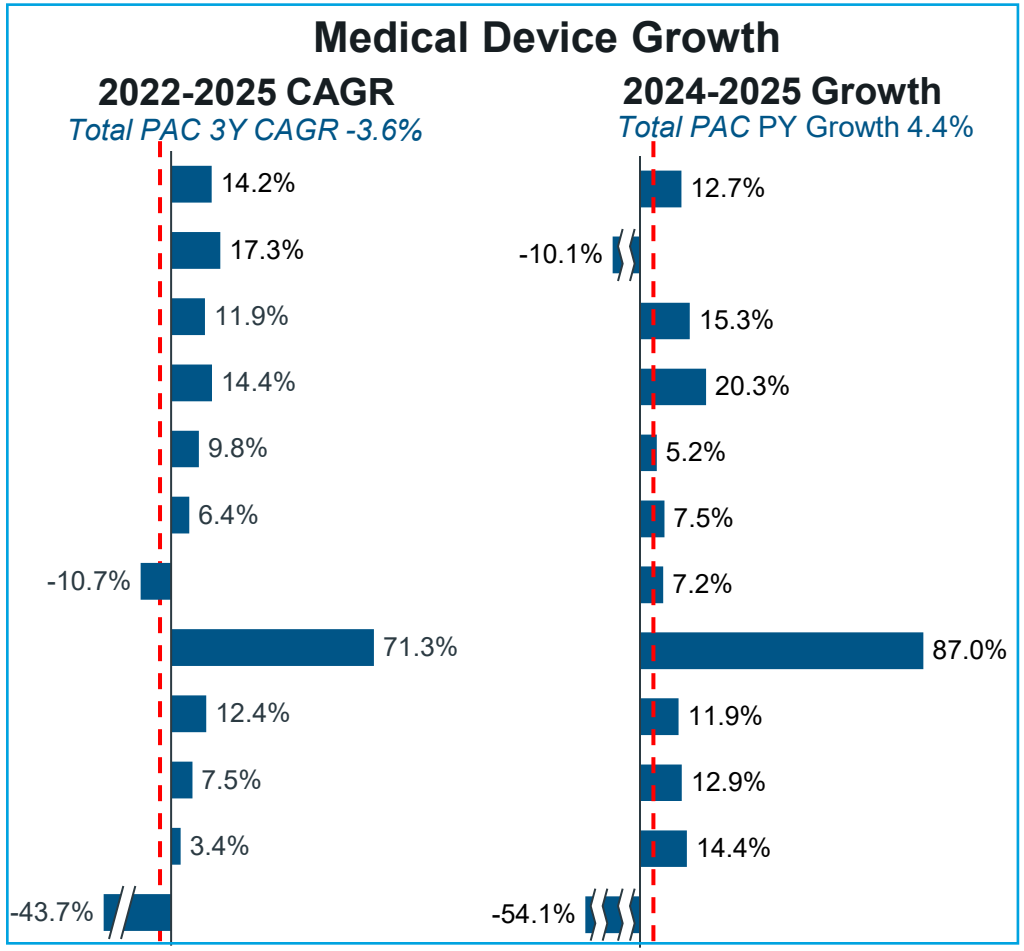
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Norway PAC Performance by CHC 1 Category in 2025 (2/2)

Majority of categories within the PAC segment have experienced positive growth



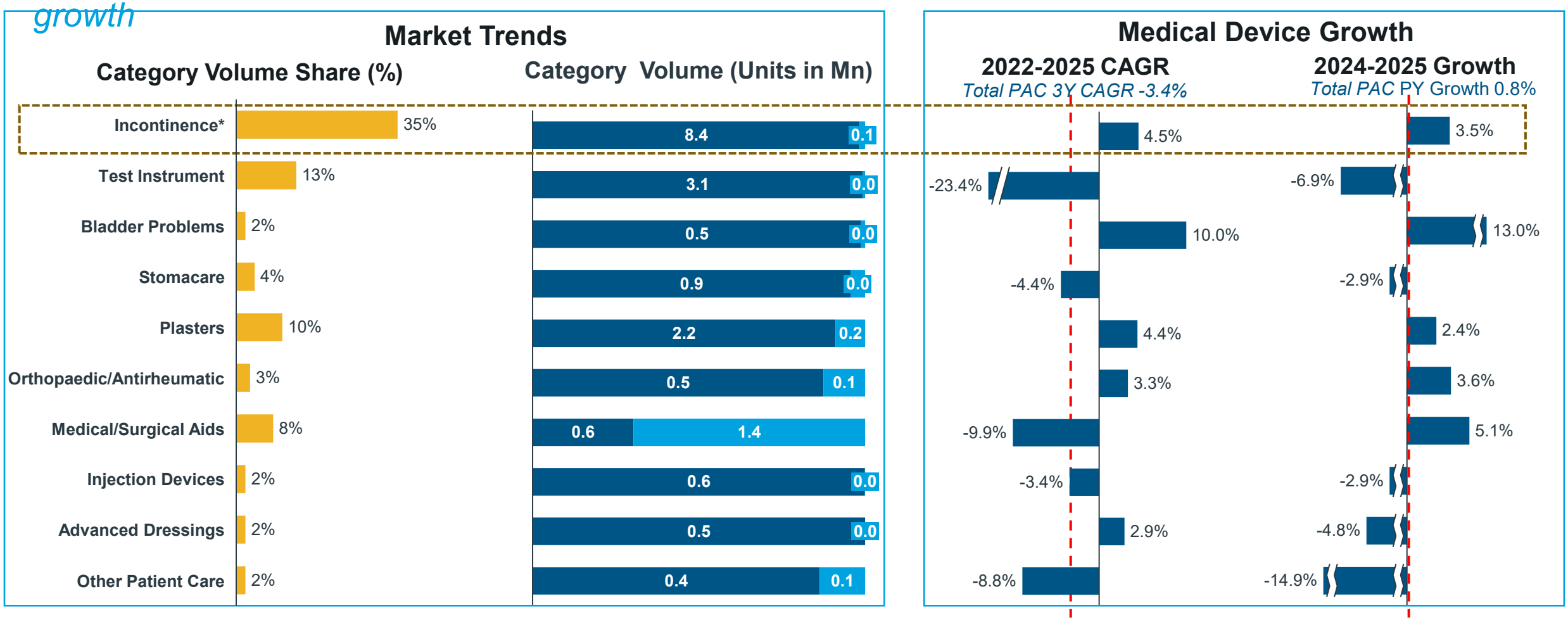


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Norway PAC Performance by CHC 1 Category (1/2)

Incontinence products are leading in volumes; bladder problem subcategory records highest growth

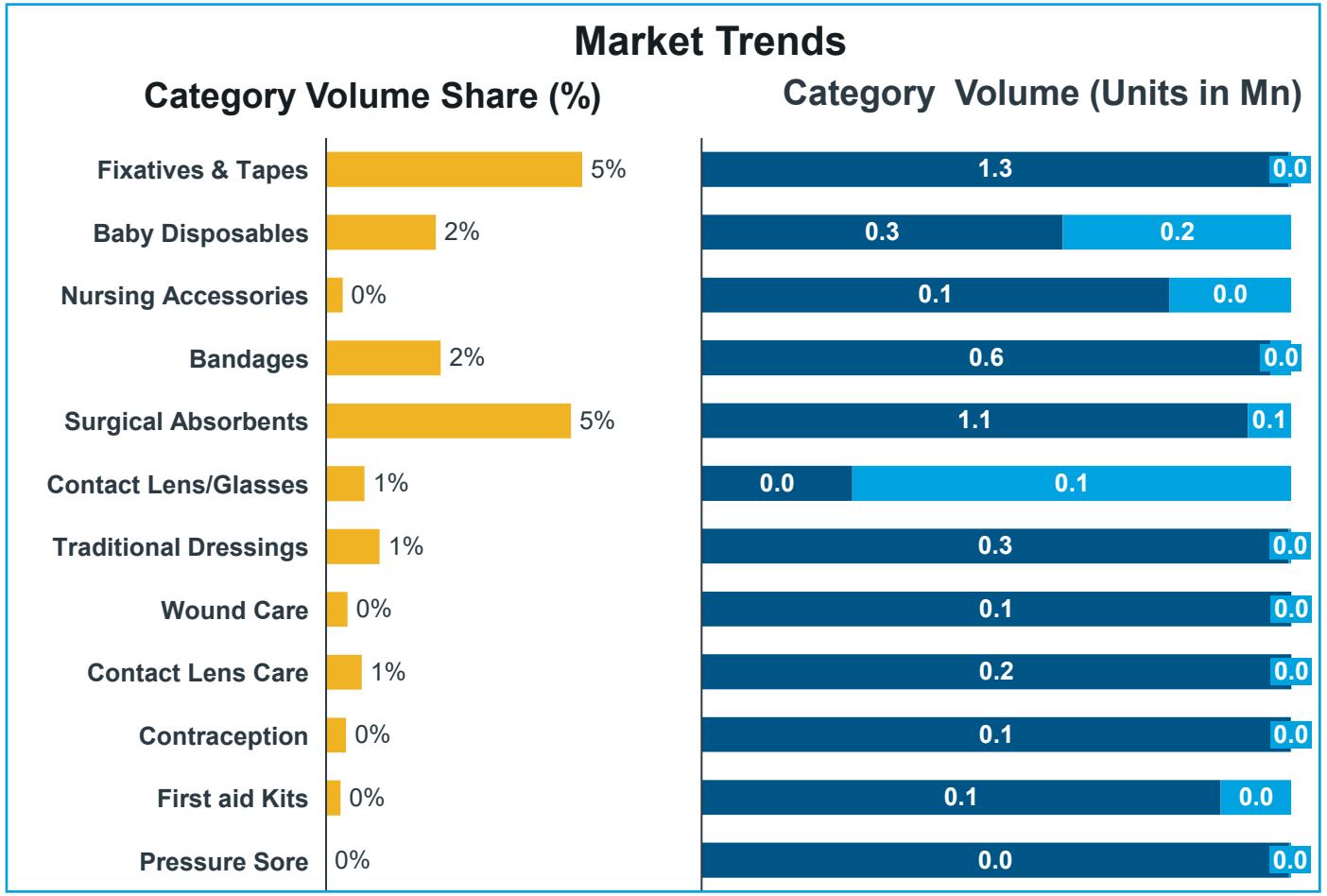


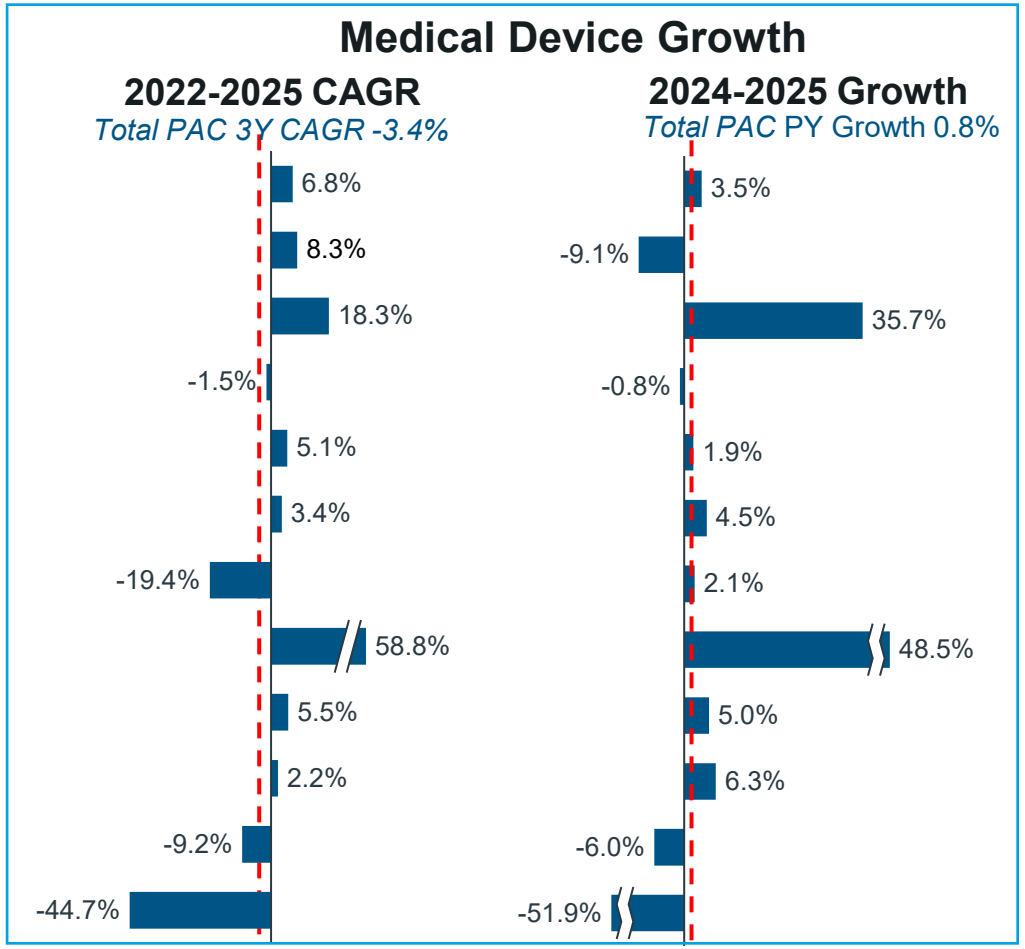
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Norway PAC Performance by CHC 1 Category (2/2)

Smaller segments within the PAC category have shown positive growth in both short and long term





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Norway Medical Devices Performance by top CHC 2 Segments

Moderate heavy severe incontinence products hold the highest share among CHC 2 segments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**253.2**	
Incontinence	28%	69.8	Mod Heav Sev Incont. 46.5; Light Incontinence 18.7; Bed Sheets/Pads 4.2; Other Incontinence Prds 0.4
Test Instrument	23%	57.8	Gluc Measuring 38.8; Lancets+Sampling 5.0; Thermometers 3.9; Pregnancy Test 3.7
Bladder Problems	13%	32.5	Urethral Catheters 29.0; Drainage Bags & Cover 1.4; Urinary Sheaths & Access. 1.0; Other Bladder Problems 1.0
Stomacare	7%	18.4	Ileo-Colo+Urostomy 7.9; Stomacare Acces. 5.8; Stomacare Protectives 4.7
Orthopaedic/ Antirheumatic	5%	12.0	Belts Other Supp 5.5; Curativ/Elastic Stocking 5.0; Equiment for Disabled 0.6; Clogs+Orthopaedic Footwear 0.5
Plasters	5%	12.0	Special Plaster 5.5; Plaster Strip 4.3; Plaster Spec. Uses 2.1; Liquid Plaster 0.1

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Norway Medical Devices Performance by top CHC 2 Segments

Similarly, moderate heavy severe incontinence products lead in volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**22.0**	
Incontinence	38%	8.4	Mod Heav Sev Incont. 5.0; Light Incontinence 3.1; Bed Sheets/Pads 0.3; Other Incontinence Prds 0.0
Test Instrument	14%	3.1	Gluc Measuring 1.3; Coronavirus Test 0.5; Lancets+Sampling 0.4; Pregnancy Test 0.4
Bladder Problems	2%	0.5	Urethral Catheters 0.4; Drainage Bags & Cover 0.1; Other Bladder Problems 0.0; Urinary Sheaths & Access. 0.0
Stomacare	4%	0.9	Stomacare Protectives 0.4; Stomacare Acces. 0.3; Ileo-Colo+Urostomy 0.2
Orthopaedic/ Antirheumatic	2%	0.5	Belts Other Supp 0.3; Curativ/Elastic Stocking 0.2; Equiment for Disabled 0.0; Clogs+Orthopaedic Footwear 0.0
Plasters	10%	2.2	Plaster Strip 1.4; Special Plaster 0.8; Plaster Spec. Uses 0.0; Liquid Plaster 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

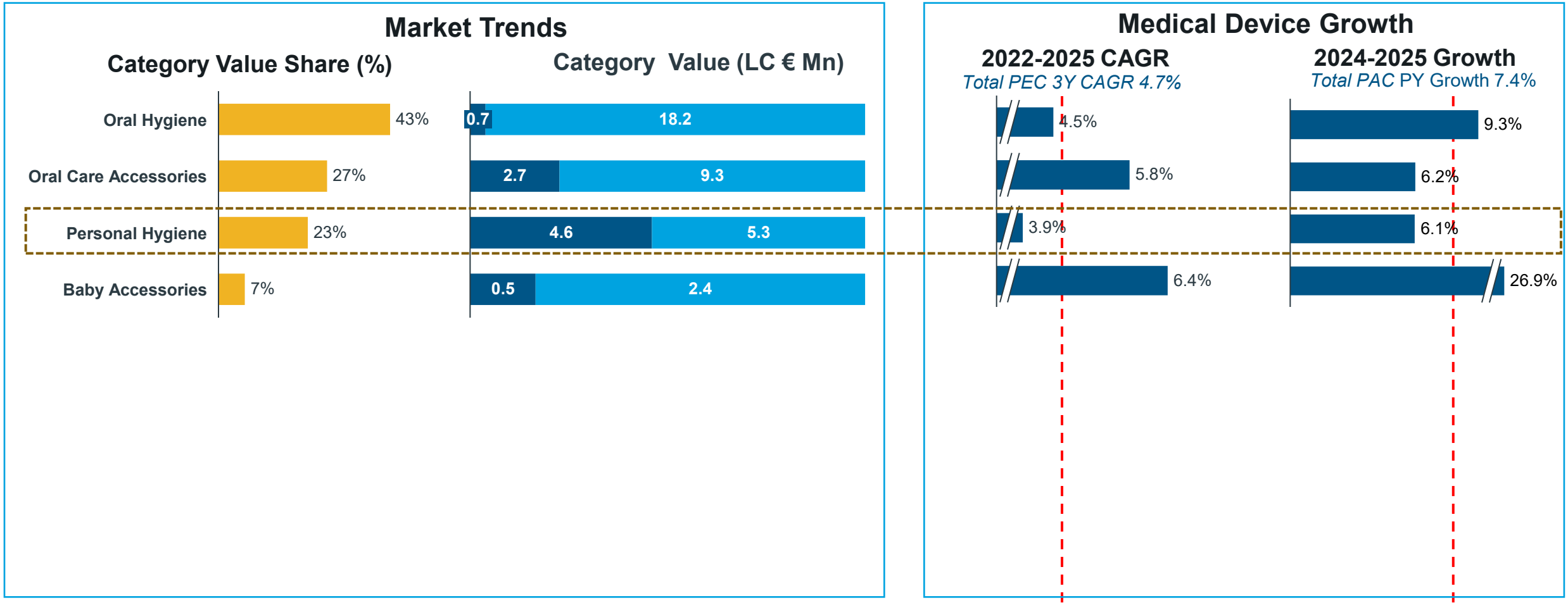
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

No PEC Performance by CHC 1 Category

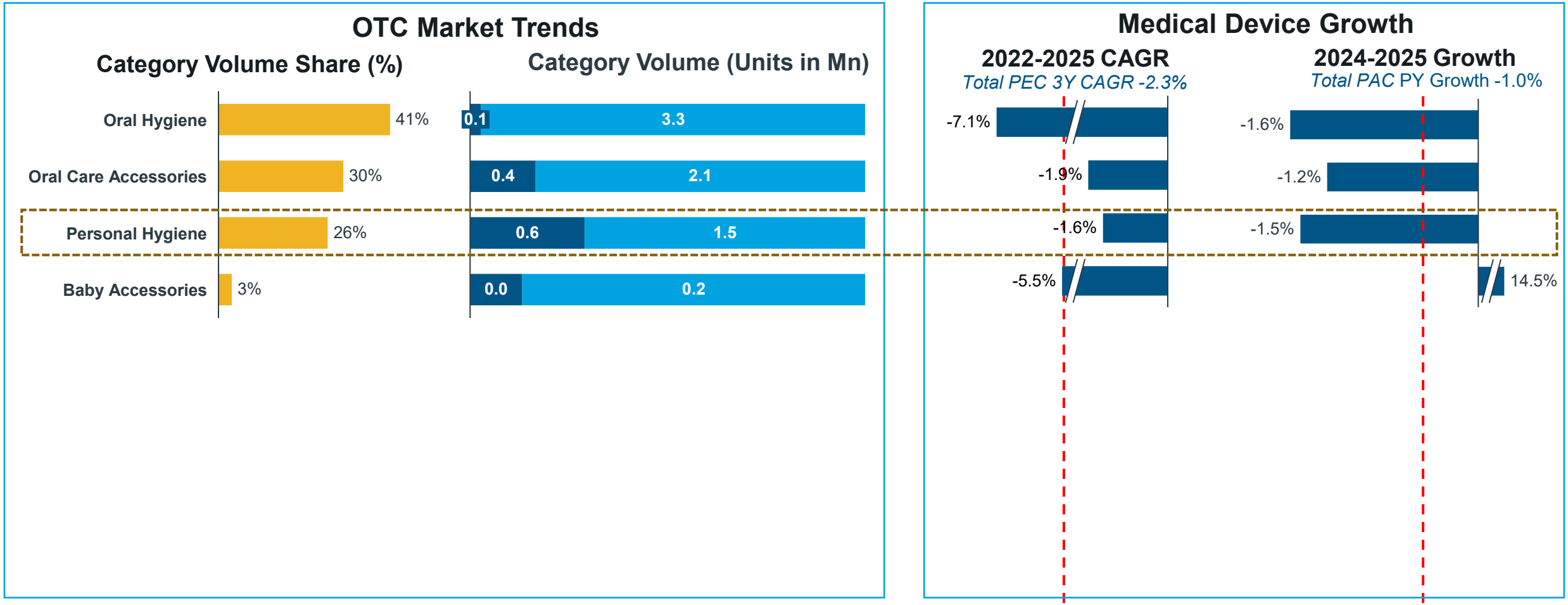
In terms of value, personal hygiene products lead the CH medical device market



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Norway PEC Performance by CHC 1 Category

Personal hygiene also leads in terms of volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Norway Medical Devices Performance by top CHC 2 Segments

Intimate hygiene from the personal hygiene category, is the leading segment within CHC 2

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**8.5**	
Personal Hygiene	54%	4.6	Intimate Hygiene 4.6; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	32%	2.7	Denture Products 2.5; Other Oral Care Acces. 0.2; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	9%	0.7	Toothpastes 0.6; Mouthwashes 0.1; Other Oral Care 0.1
Baby Accessories	6%	0.5	Dummies/Pacifiers/Teeth 0.3; Feeding Bottles &Acces. 0.2

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Norway Medical Devices Performance by top CHC 2 Segments

Intimate hygiene also leads in terms of volume

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**1.2**	
Personal Hygiene	54%	0.6	Intimate Hygiene 0.6; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	35%	0.4	Denture Products 0.4; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	8%	0.1	Toothpastes 0.1; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	3%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Czech Republic Medical Devices – Market Dynamics

Czech Medical Devices Performance Overview

Medical devices has grown in values both L-T and S-T with PAC showing the highest market penetration

33%

Medical device share of total CH value in 2025

Long –term Growth

4.0% by value

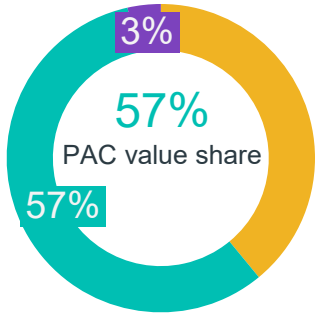
-0.4% by volume

Short –term Growth

5.5% by value

2.4% by volume

Medical Devices – €303 Mn (2025)



Long-term Growth (Value)

1.3% PAC

8.6% OTC

4.9% PEC

Medical Devices Categories

36%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **73%** of new pack launches

Medical Devices Innovation

Incontinence

41% *Share of total PAC values in 2025; Dominated by **Mod Heav incontinence***

Long-term Growth

9.7% by value

PAC (Patient care)

CCR

39% *Share for total OTC value in 2025, Dominated by **Nasal Saline***

Long-term Growth

9.3% by value

OTC (Over-the-Counter)

Oral Care Accessories

82% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

4.3% by value

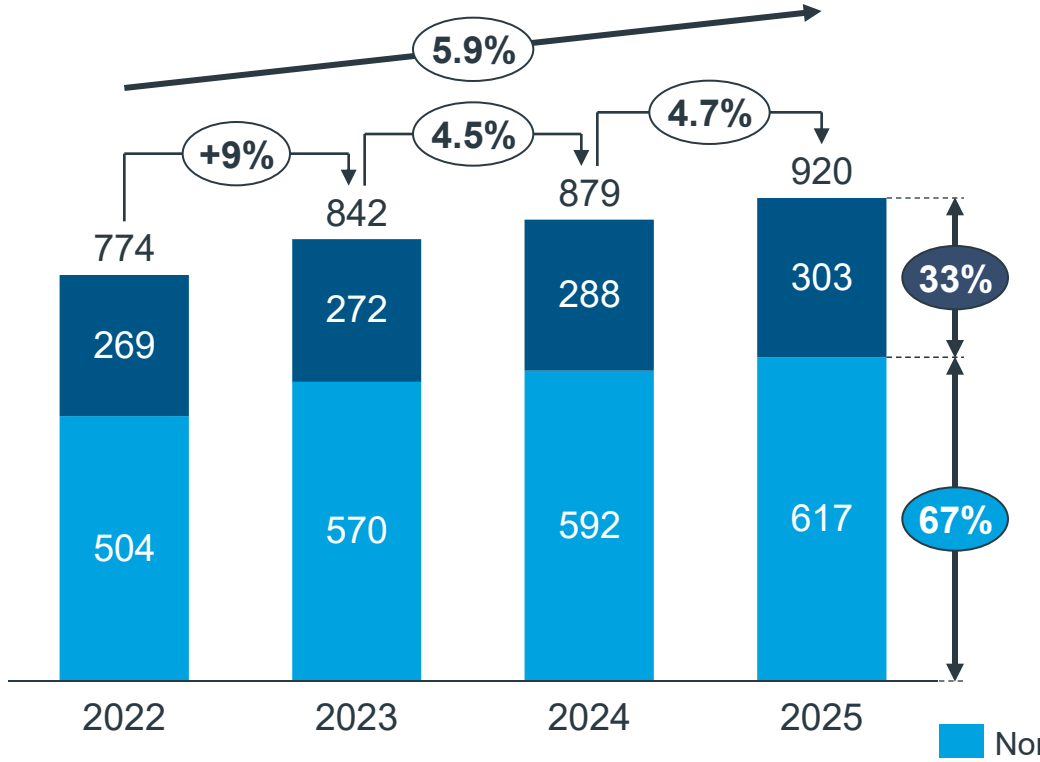
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

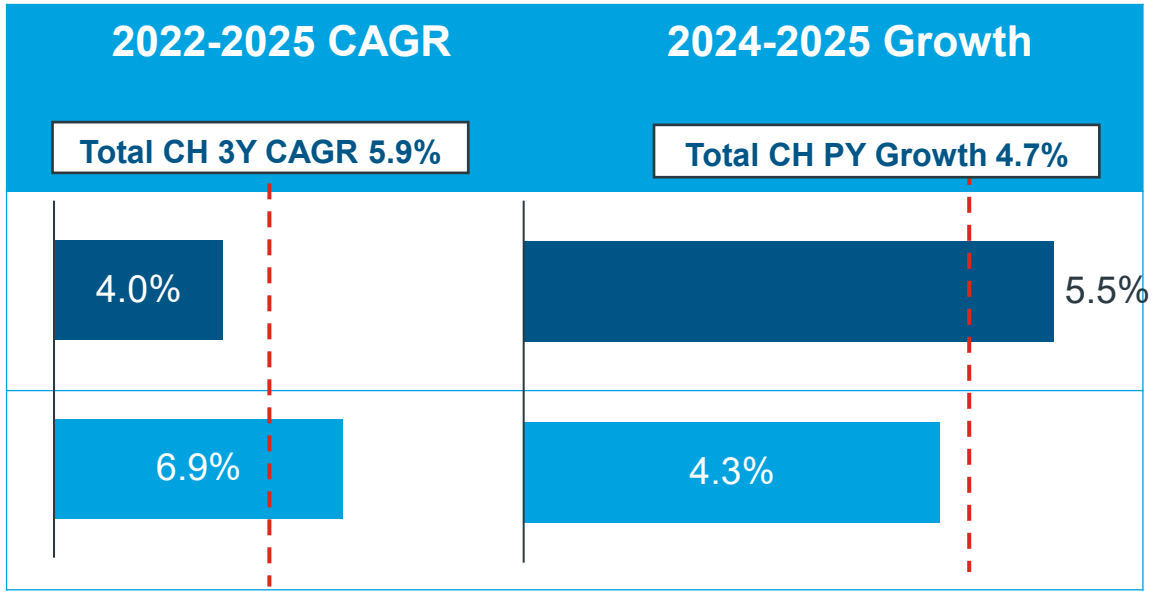
Czech CH Market Size & Growth

The CH market has grown at 5.9% between 2022 and 2025, with the medical devices segment reaching a value of €0.303 Bn in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

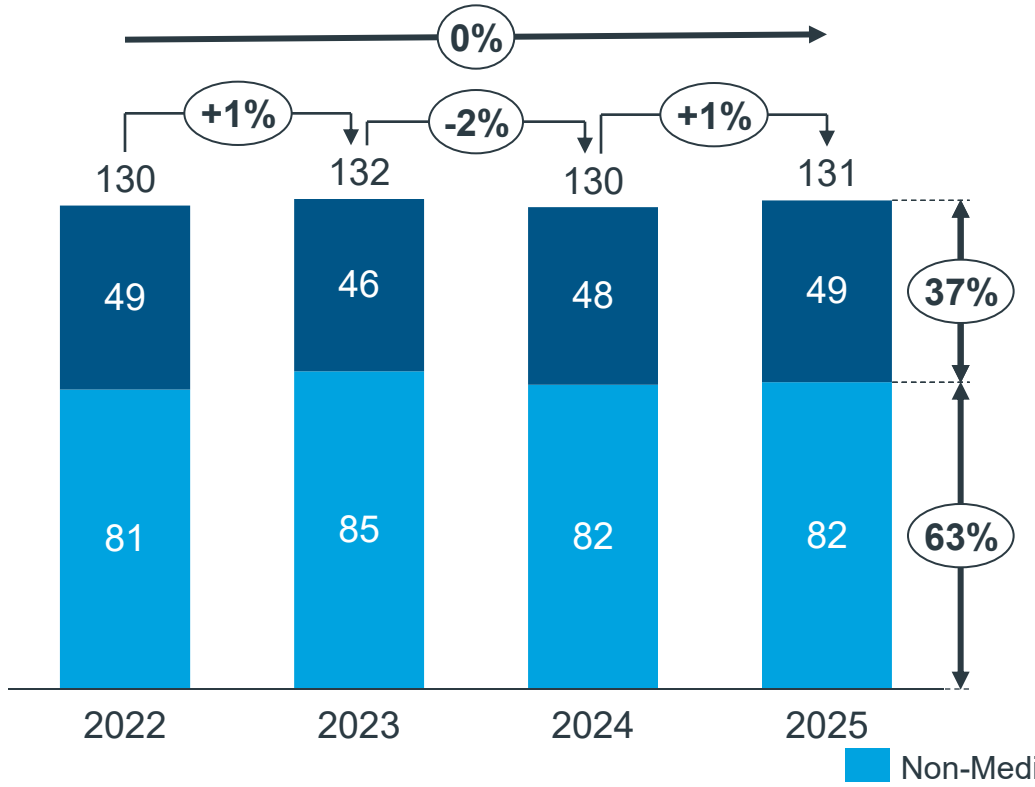


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

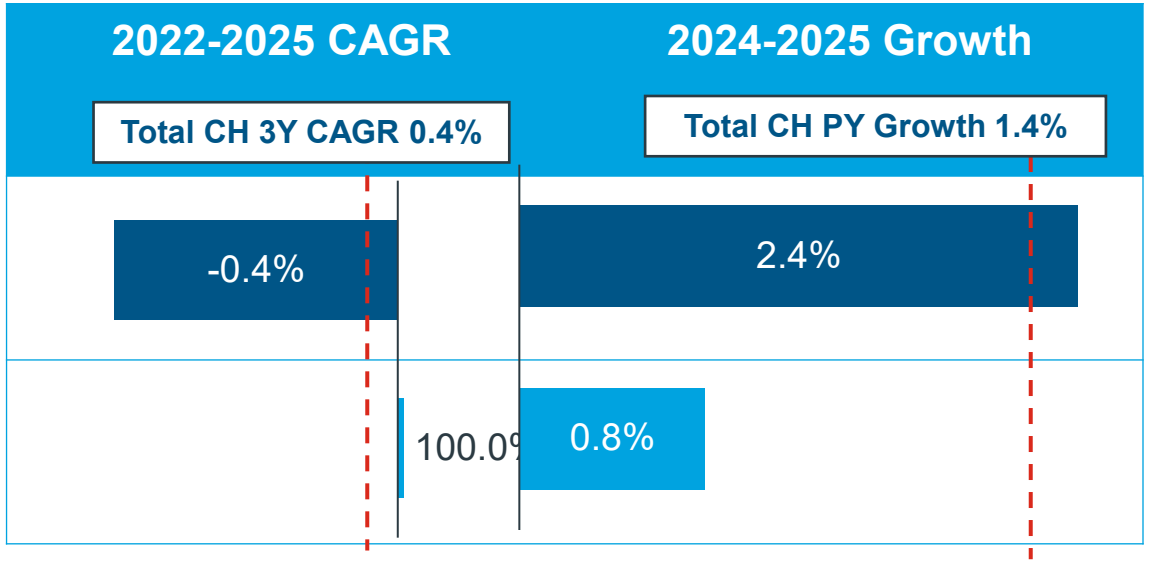
Czech CH Market Volume & Growth

Medical devices account for 37% of the CH market volume, while the overall market has shown a flat trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Czech CH Performance by Classes

*PAC leads with **€174 Mn** in medical device sales and positive growth, records strong growth in the S-T*

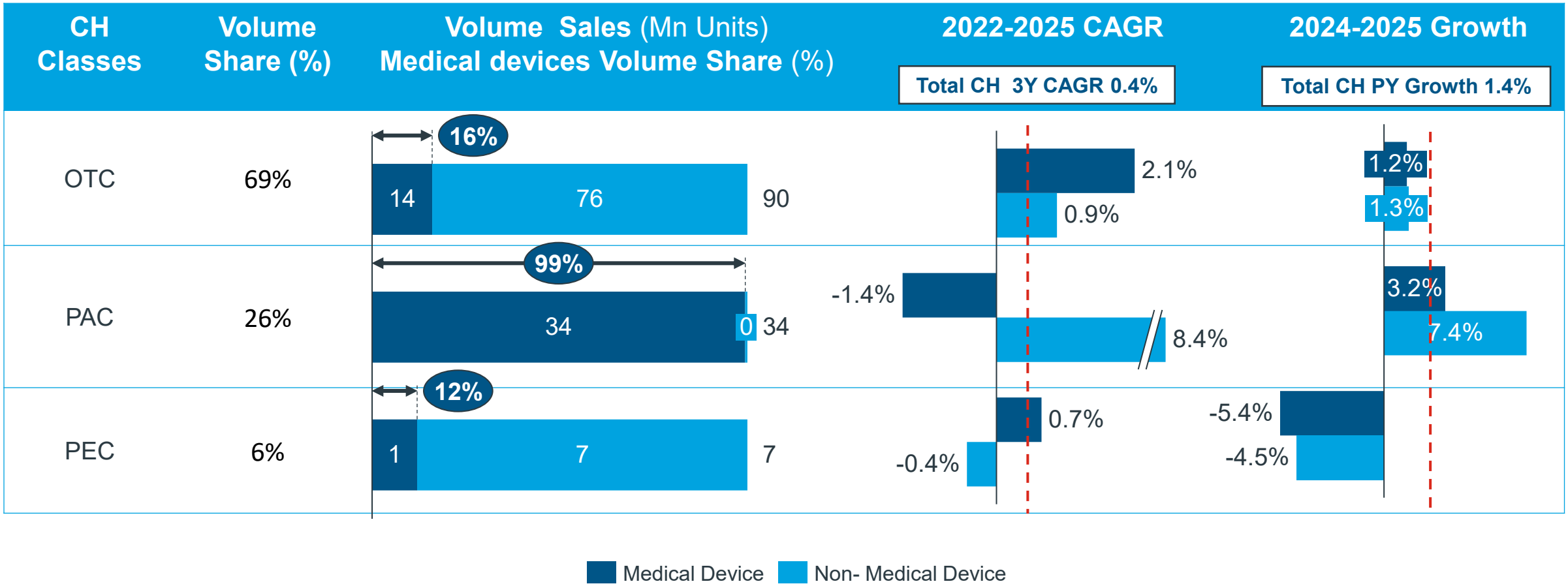
CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR (Total CH 3Y CAGR 5.9%)	2024-2025 Growth (Total CH PY Growth 4.7%)
OTC	75%	17%; 118 / 576 / 694	8.6% / 6.8%	4.6% / 4.4%
PAC	19%	99%; 174 / 2 / 176; 21%	1.3% / 11.0%	6.6% / 12.0%
PEC	5%	11 / 40 / 50	4.9% / 8.7%	-2.9% / 2.0%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Czech CH Performance by Classes

Patient Care leads in medical device volume sales with 34mn units and holds the highest medical device volume share (99%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Czech Medical Devices Packs & New Launches

The majority of the Medical devices new launches come from Patient Care category in last 3 years

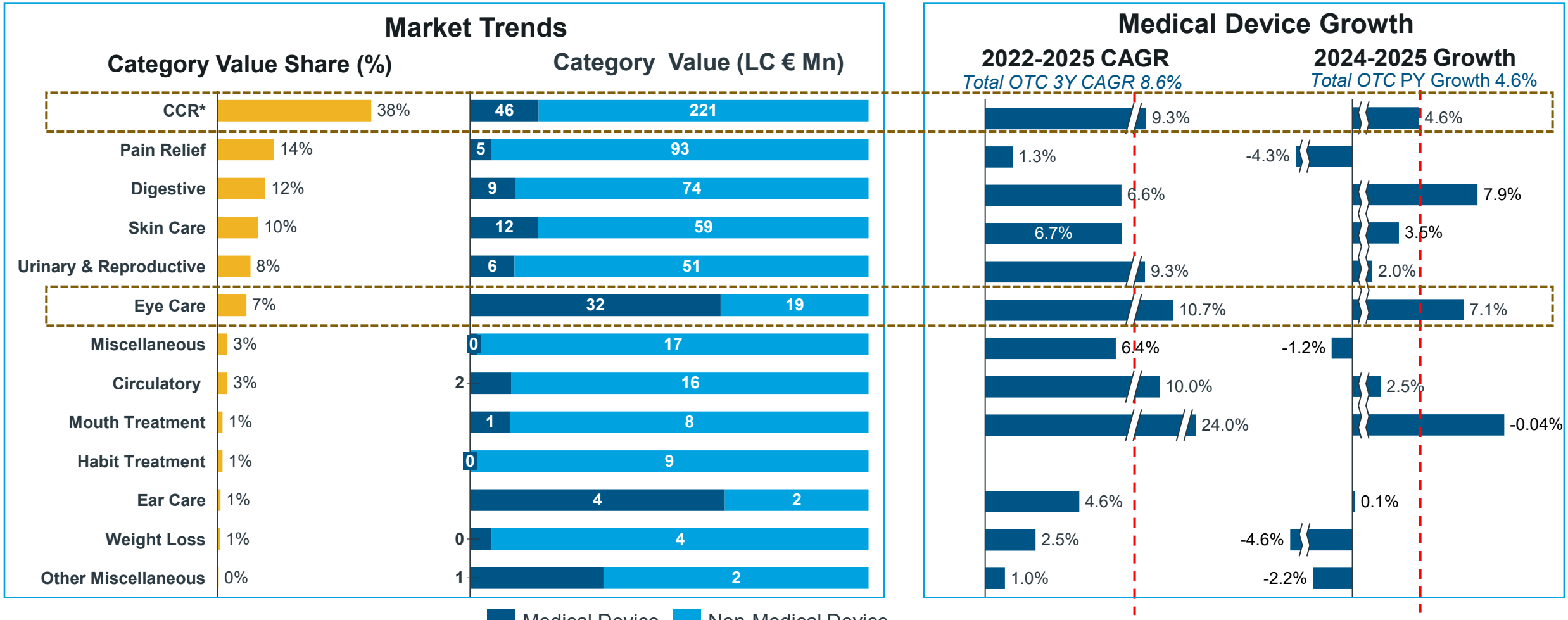
Category	Total Packs*			New Launches**		
CH Total	5,163	7,290	**12,453**	1,510	2,660	**4,170**
OTC	588	3,902	**4,490**	178	1,342	**1,520**
Patient Care	4,019	516	**4,535**	1,106	145	**1,251**
Personal Care	556	2,872	**3,428**	226	1,173	**1,399**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Czech OTC Performance by CHC 1 Category in 2025

*CCR leads the medical devices values with **€46 Mn** in sales followed by Eye care at **€32 Mn***

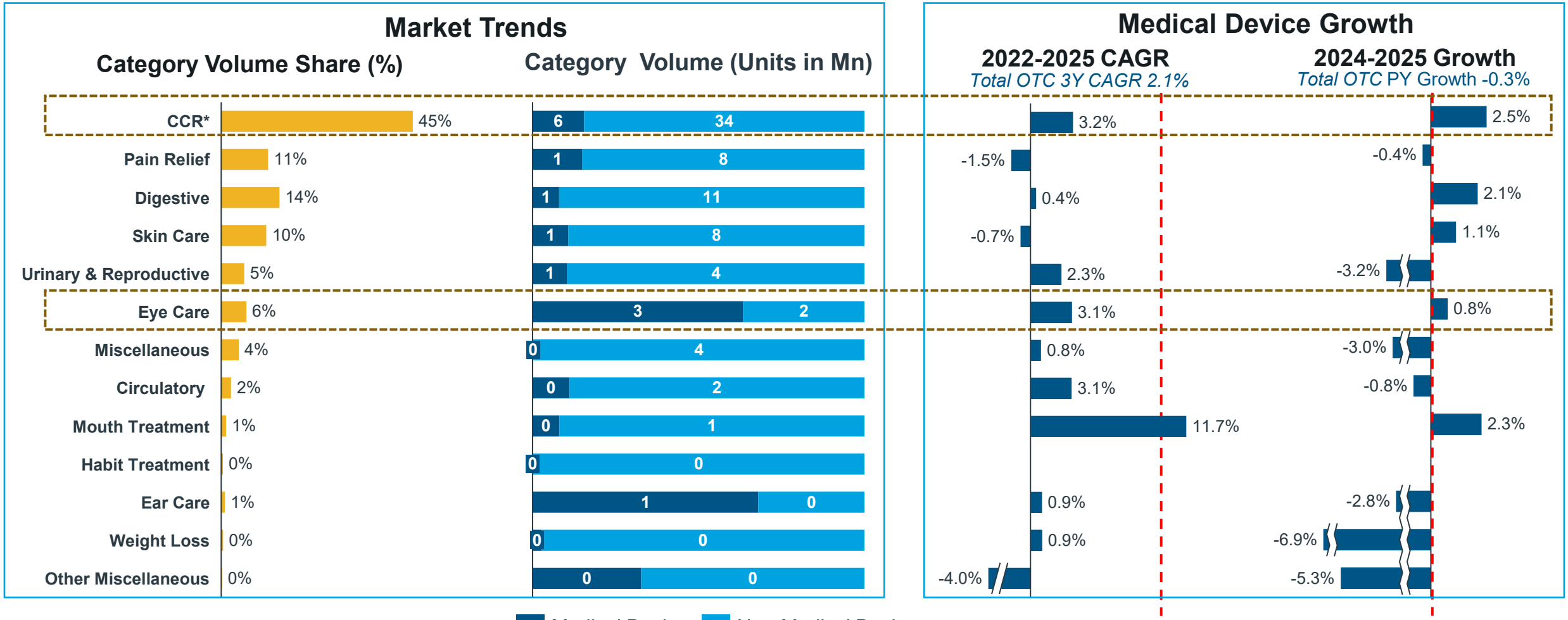


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Czech OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share, followed by Eye care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Czech Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Nasal saline in CCR segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**118.5**	
CCR	39%	45.9	Nasal Saline 16.4; Sore Throat 10.6; Cough 9.9; Other Respiratory 5.9
Eye Care	27%	31.7	Not available
Skin Care	10%	12.1	Skin Protector/Emollients 3.9; Wound Healing 2.1; Wart/Corn Removal 2.1; Antifungals 1.7
Digestive	8%	9.4	Laxatives 3.2; Digestive 2.5; Acid & Heartburn 2.1; Antidiarrhoeals 1.6
Urinary & Reproductive	5%	6.4	Gynaecological 6.1; Urinary Condition 0.3; Urology 0.0; Male Condition 0.0
Pain Relief	4%	5.2	Muscular Pain 4.0; Mouth Pain 1.3; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Czech Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	3.5	Not available
Circulatory	2%	1.8	Antihemorrhoids 1.8; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.9	Other Mouth Treatment 0.6; Mouth Infection 0.3; Fluoride Products 0.0
Other Miscellaneous	1%	0.8	Not available
Miscellaneous	0%	0.3	Not available
Weight Loss	0%	0.3	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Czech Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in CCR, alongside Sore throat in CCR, in terms of volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**14.4**	
CCR	43%	6.2	Nasal Saline 2.4; Sore Throat 1.7; Cough 1.0; Other Respiratory 0.8
Eye Care	23%	3.3	Not available
Skin Care	7%	1.0	Skin Protector/Emollients 0.4; Wound Healing 0.2; Antifungals 0.1; Skin Irritation 0.1
Digestive	7%	1.0	Digestive 0.3; Laxatives 0.3; Acid & Heartburn 0.2; Antidiarrhoeals 0.1
Urinary & Reproductive	3%	0.5	Gynaecological 0.5; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	10%	1.5	Muscular Pain 1.3; Mouth Pain 0.2; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Czech Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	4%	0.5	Not available
Circulatory	2%	0.2	Antihemorrhoids 0.2; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.1	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

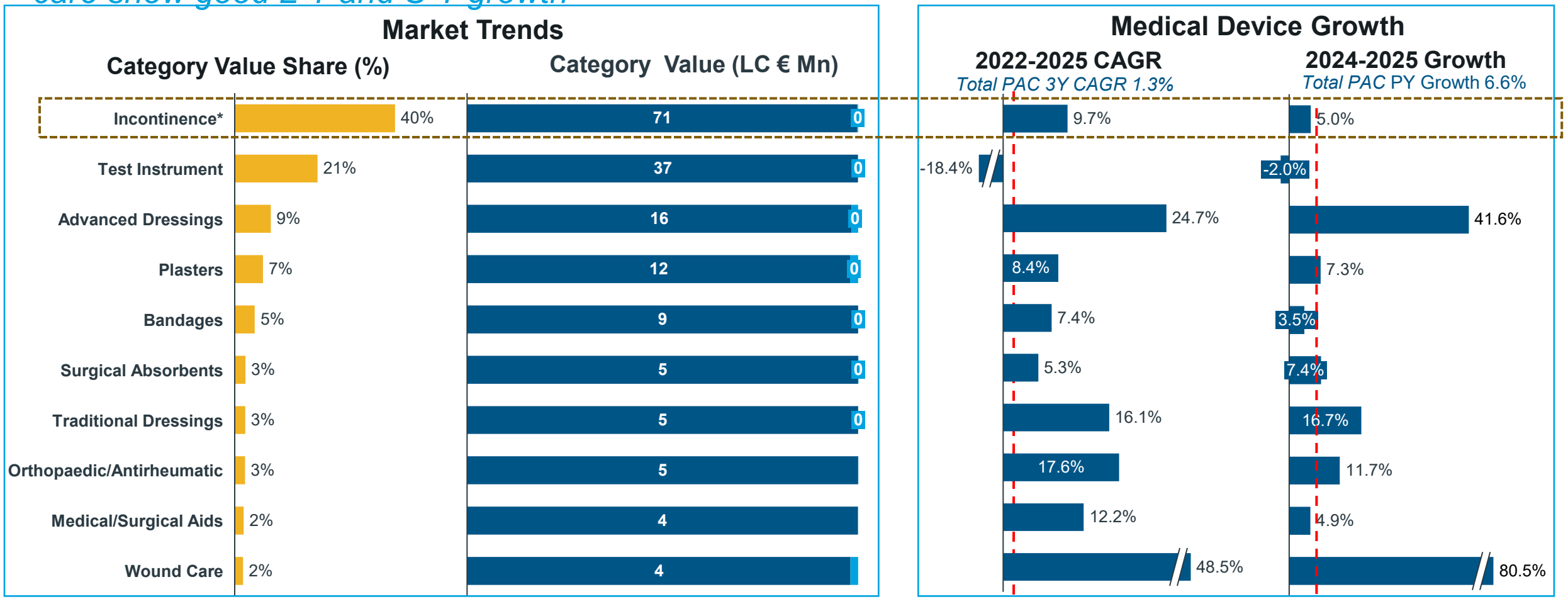
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Czech PAC Performance by CHC 1 Category in 2025 (1/2)

*Incontinence leads medical devices values with **€71 Mn** sales; while advanced dressings and wound care show good L-T and S-T growth*

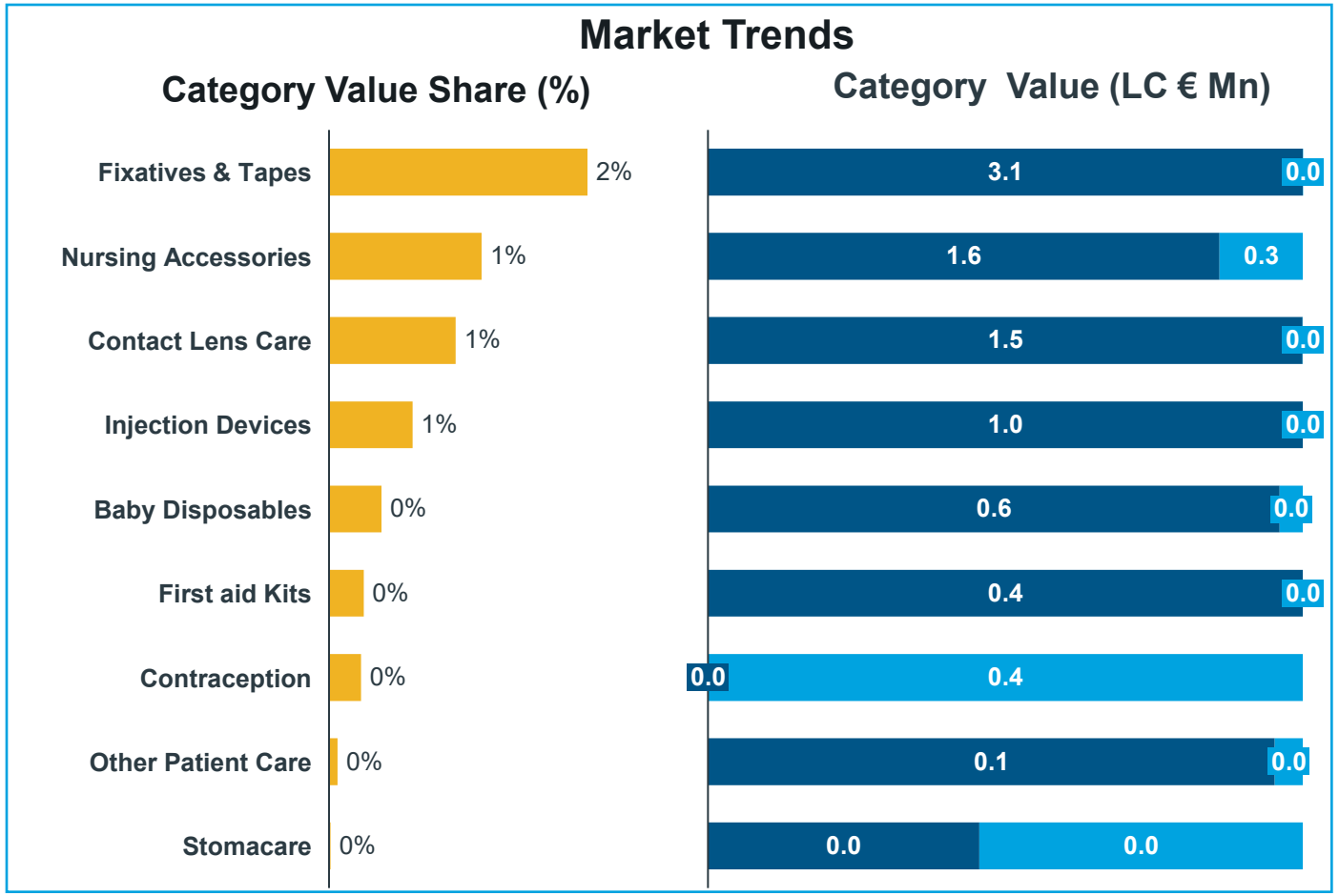


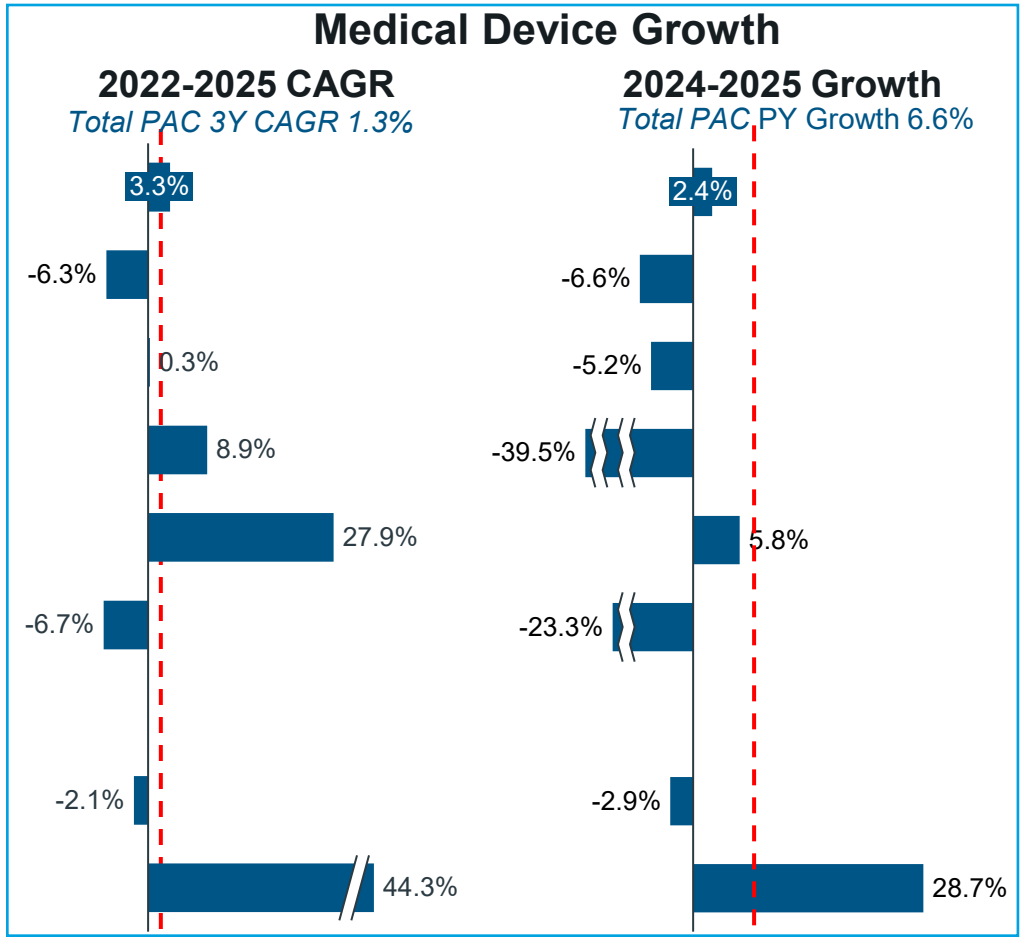
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Czech PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like Baby disposables and Stomacare show positive growth in S-T and L-T despite overall decline in the market





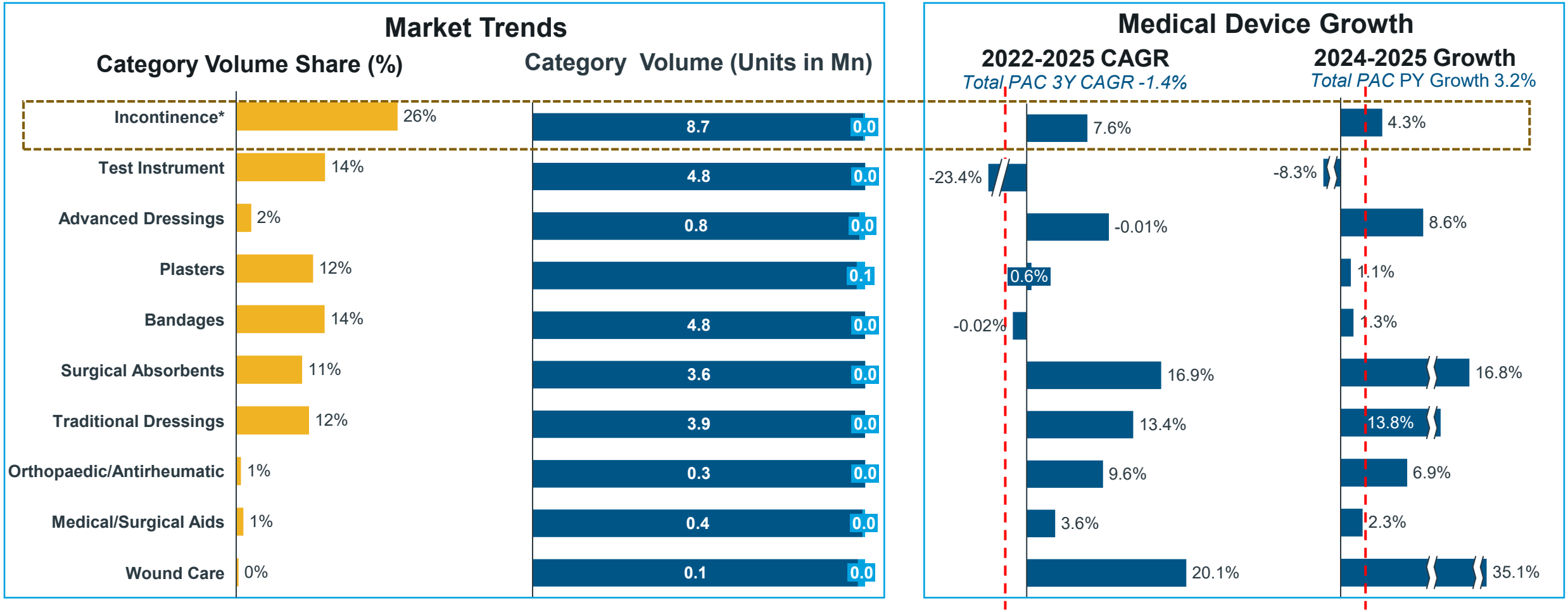
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

Medical Device | Non-Medical Device

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Czech PAC Performance by CHC 1 Category (1/2)

Incontinence hold the highest volume share as well

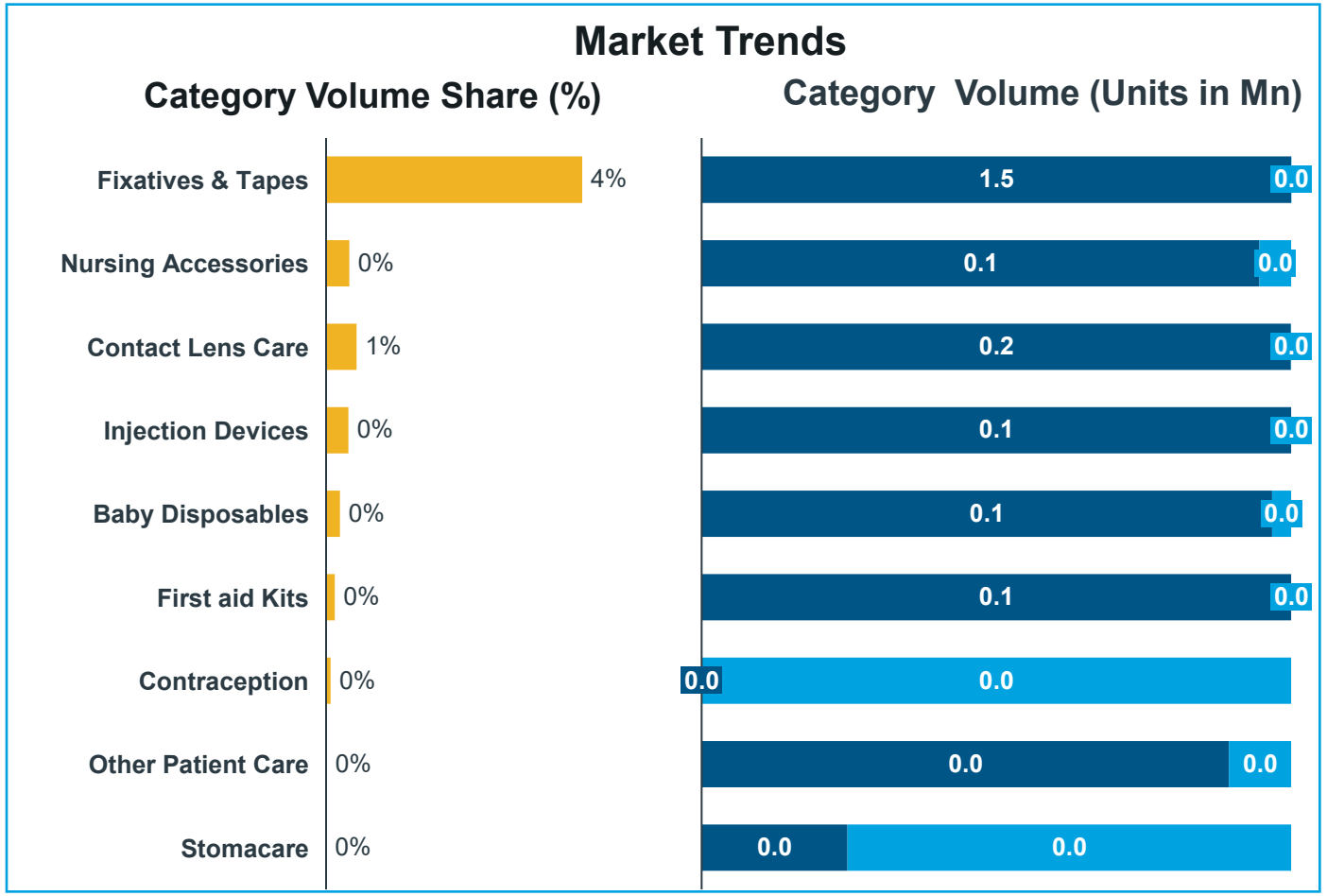


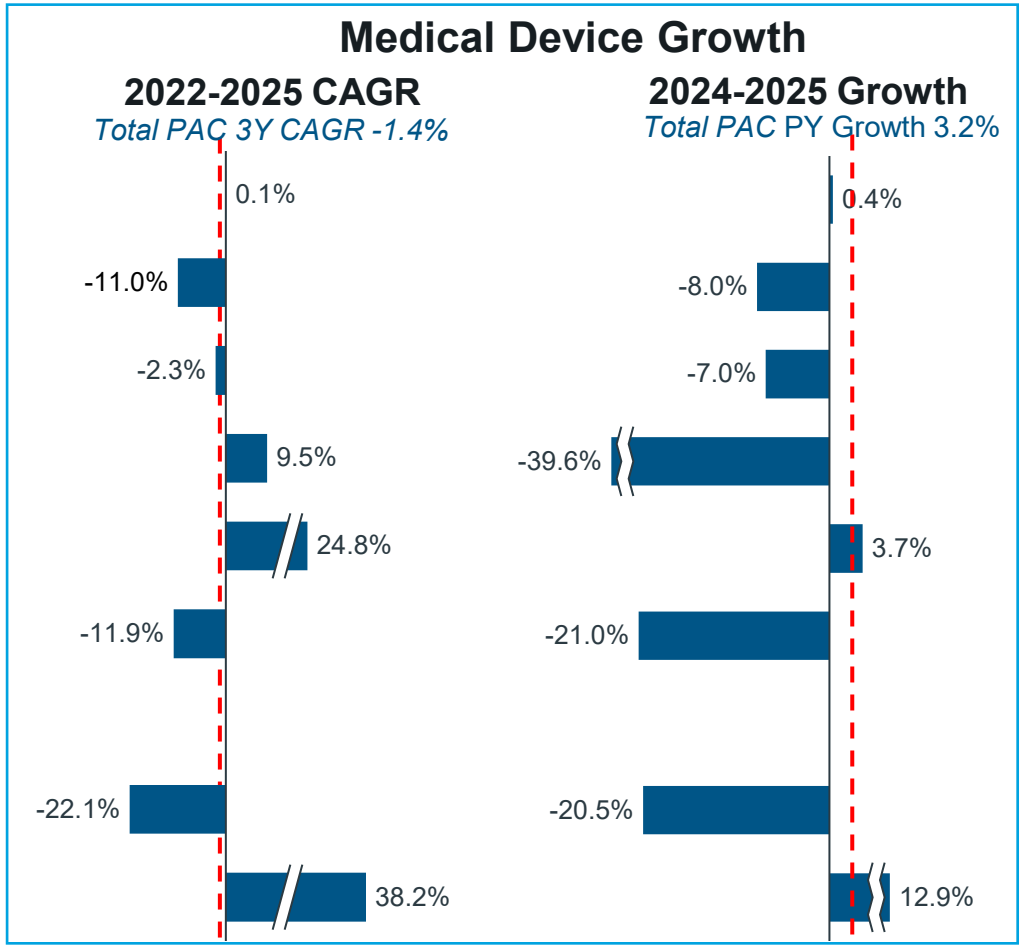
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Czech PAC Performance by CHC 1 Category (2/2)

Small categories like Baby disposables and other stomacare show a positive growth trend





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Czech Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 85% of values; dominated by moderate, heavy and severe incontinence products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025			
PAC- Medical Devices		**174.5**				
Incontinence	41%	70.9	Mod Heav Sev Incont. 43.4	Light Incontinence 23.6	Bed Sheets/Pads 3.9	Incontinence care 0.0
Test Instrument	21%	36.7	Gluc Measuring 14.5	Blood Press Monitors 6.6	Thermometers 4.7	Coronavirus Test 4.7
Advanced Dressings	9%	15.7	Base Tech 11.0	Anti-Infection 3.6	Hyaluron 1.1	Collagen 0.0
Plasters	7%	12.2	Plaster Strip 6.3	Special Plaster 5.0	Liquid Plaster 0.8	Plaster Spec. Uses 0.1
Bandages	5%	8.9	Retention/Fixativ 5.7	Compression 3.1	Orthopaedic Casting 0.1	Other Bandages 0.0
Surgical Absorbents	3%	4.8	Packs & Patches 4.0	Swabs & Pads 0.6	Cotton wool 0.1	

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

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Czech Medical Devices Performance by top CHC 2 Segments

Light incontinence under Incontinence lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**33.5**	
Incontinence	26%	8.7	Light Incontinence 5.0; Mod Heav Sev Incont. 3.3; Bed Sheets/Pads 0.4; Incontinence care 0.0
Test Instrument	14%	4.8	Coronavirus Test 1.7; Gluc Measuring 1.2; Pregnancy Test 1.0; Thermometers 0.6
Advanced Dressings	2%	0.8	Base Tech 0.5; Anti-Infection 0.2; Hyaluron 0.1; Collagen 0.0
Plasters	12%	4.1	Plaster Strip 3.2; Special Plaster 0.8; Liquid Plaster 0.1; Plaster Spec. Uses 0.0
Bandages	14%	4.8	Retention/Fixativ 4.3; Compression 0.5; Orthopaedic Casting 0.0; Other Bandages 0.0
Surgical Absorbents	11%	3.6	Packs & Patches 2.3; Swabs & Pads 1.3; Cotton wool 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

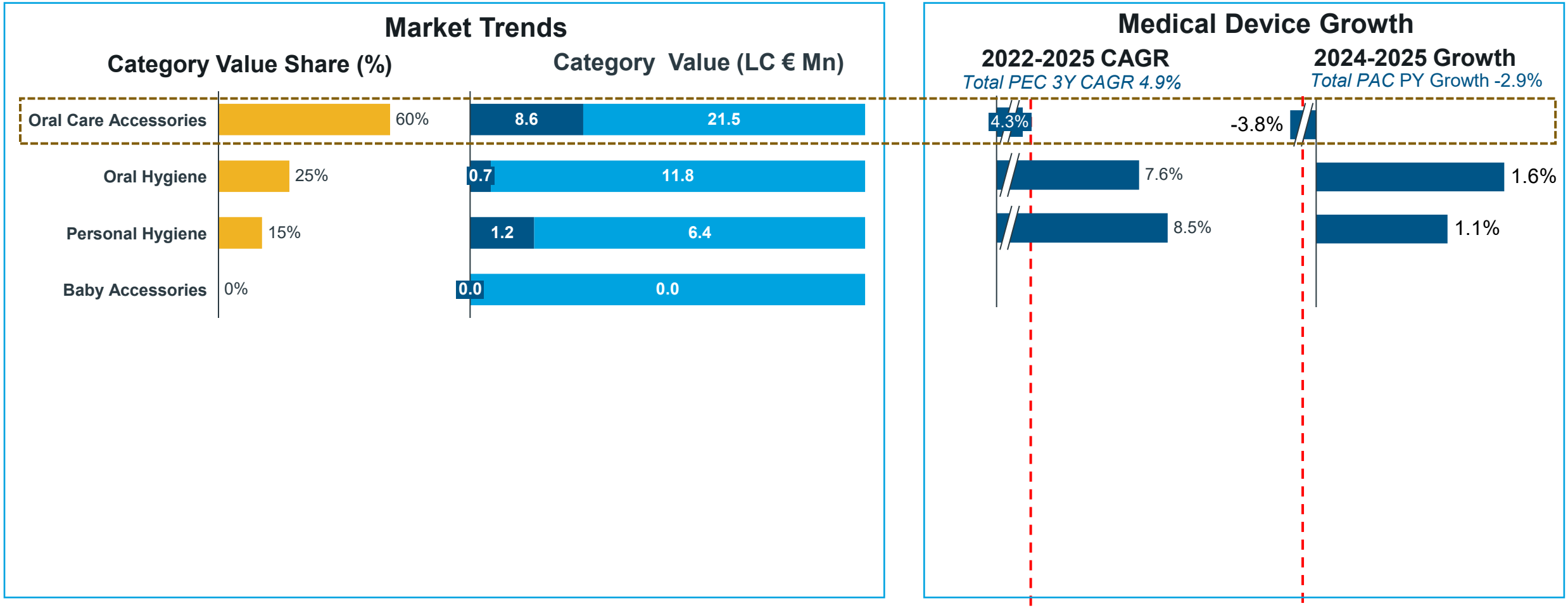
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Czech PEC Performance by CHC 1 Category

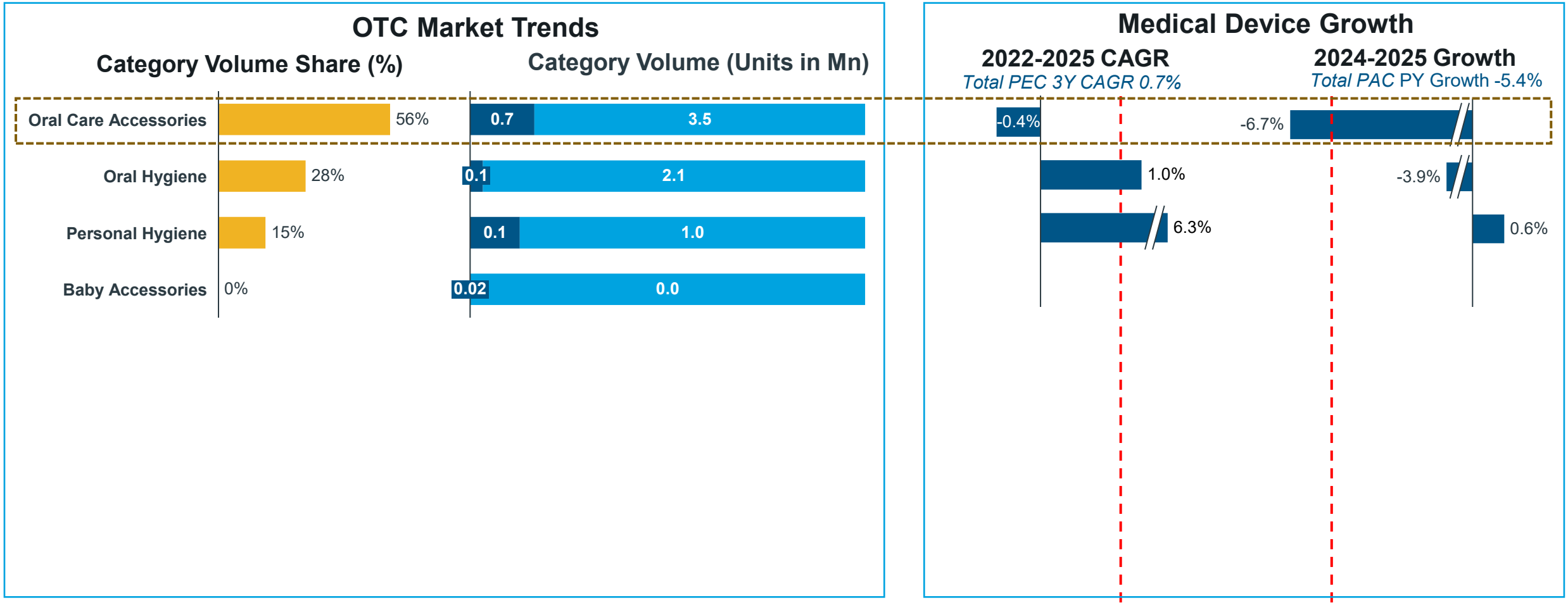
Oral care accessories leads medical devices values



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Czech PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Czech Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**10.5**	
Oral Care Accessories	82%	8.6	Denture Products 4.4; Interdental Brushes 2.1; Toothbrushes 2.0; Dental Sticks 0.1
Personal Hygiene	12%	1.2	Intimate Hygiene 1.2; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	6%	0.7	Toothpastes 0.3; Mouthwashes 0.2; Other Oral Care 0.1
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Czech Medical Devices Performance by top CHC 2 Segments

Oral Care Accessories with interdental brushes leading in volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.9**	
Oral Care Accessories	76%	0.7	Interdental Brushes 0.4; Toothbrushes 0.2; Denture Products 0.1; Dental Sticks 0.0
Personal Hygiene	16%	0.1	Intimate Hygiene 0.1; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	8%	0.1	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Greece Medical Devices – Market Dynamics

Greece Medical Devices Performance Overview

Medical devices represent 34% of the overall CH market, valued at €292 Mn

34%

Medical device share of total CH value in 2025

Long –term Growth

-4.9% by value

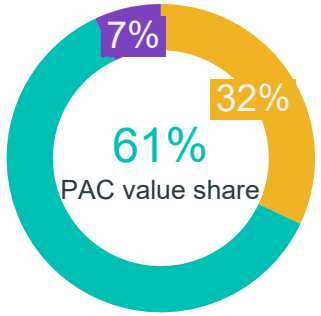
-6.7 by volume

Short –term Growth

-2.7% by value

-5.1% by volume

Medical Devices – €292 Mn (2025)



Long-term Growth (Value)

-9.7% PAC | **5.5%** OTC | **4.8%** PEC

Medical Devices Categories

39%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **86%** of new pack launches

Medical Devices Innovation

Test Instruments

67% *Share of total PAC values in 2025; Dominated by **Gluc Measuring***

Long-term Growth

-11.4% by value

PAC (Patient care)

Eye care

38% *Share for total OTC value in 2025*

Long-term Growth

7.3% by value

OTC (Over-the-Counter)

Oral Care Accessories

49% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

5.3% by value

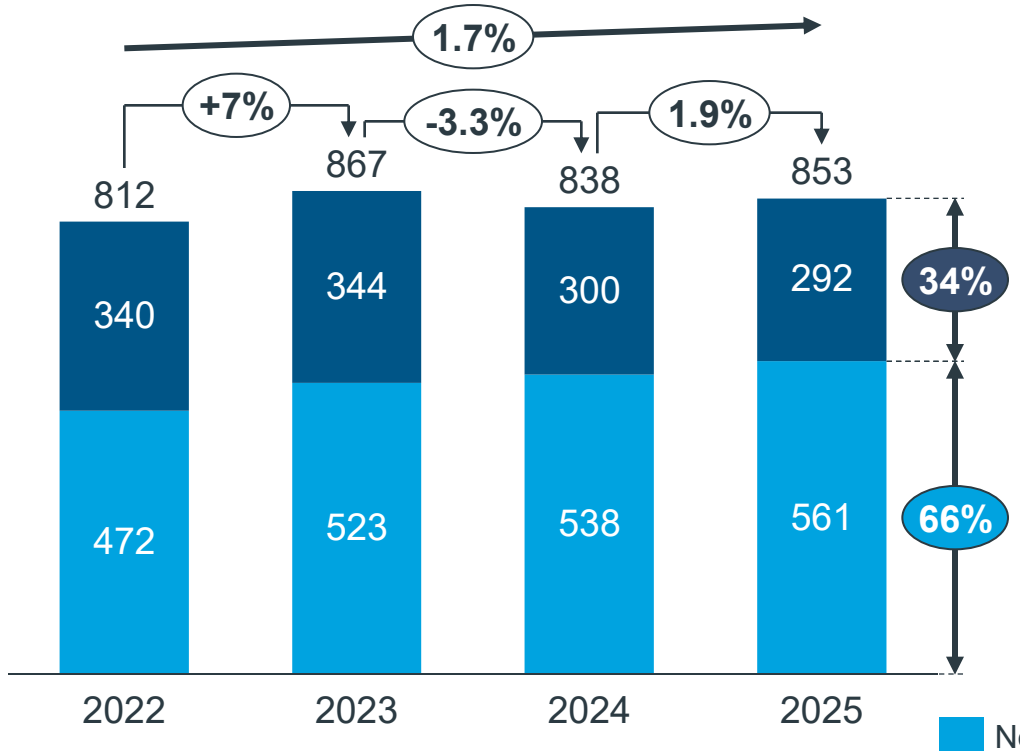
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

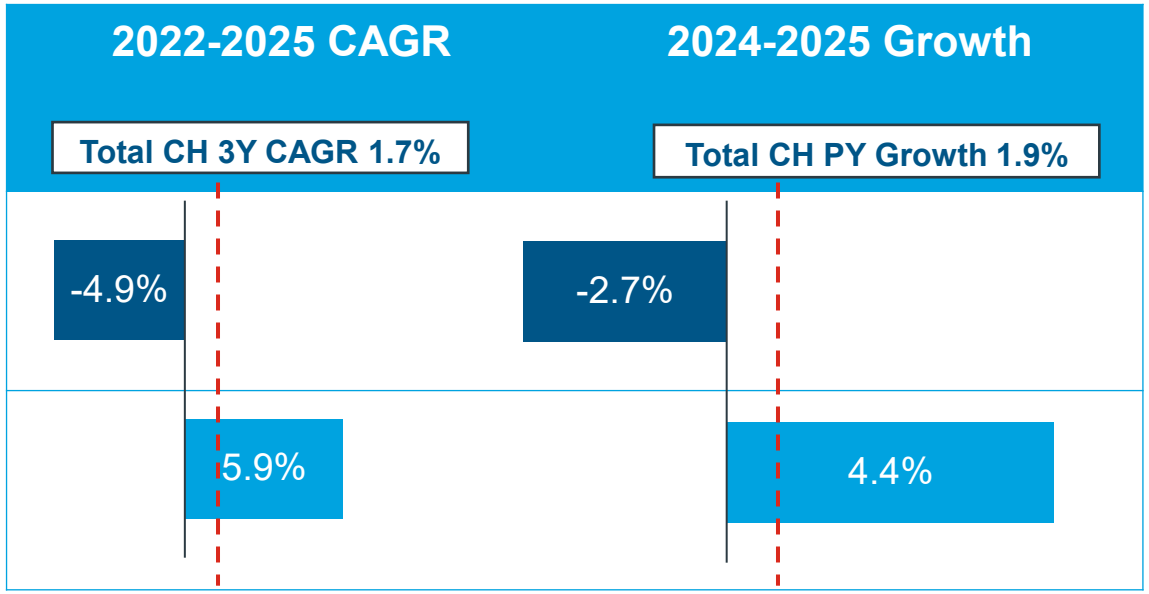
Greece CH Market Size & Growth

In general, the CH market has seen expansion, demonstrating strong long-term and short-term growth; however we witness the medical device segment shrinking

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

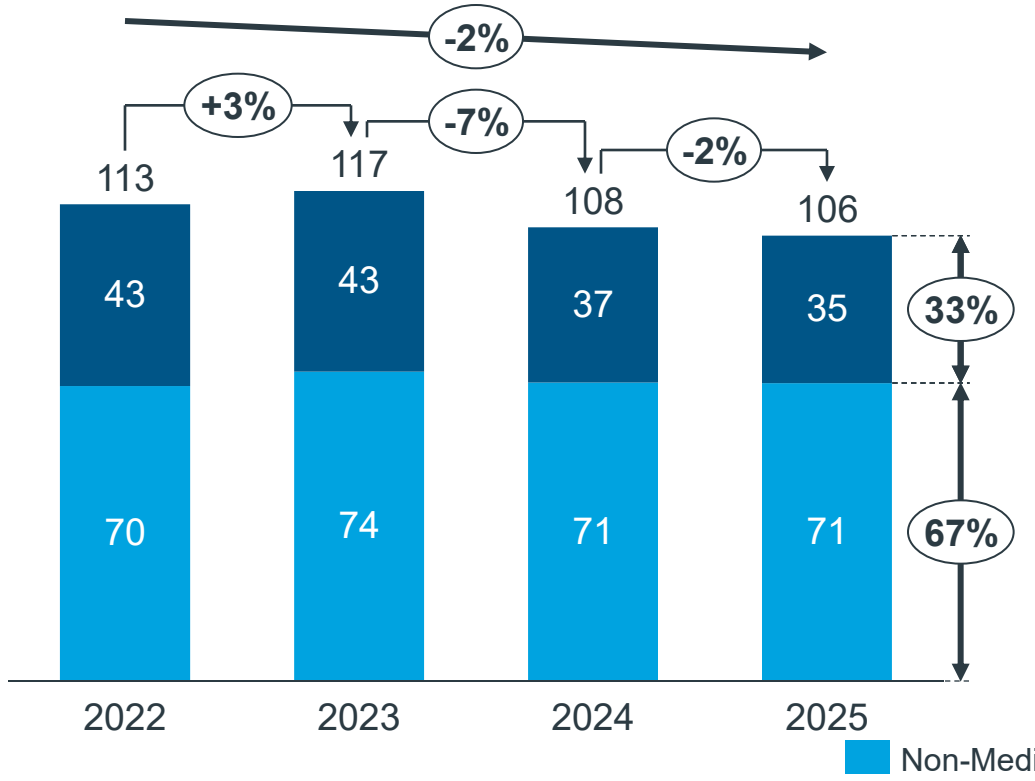


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

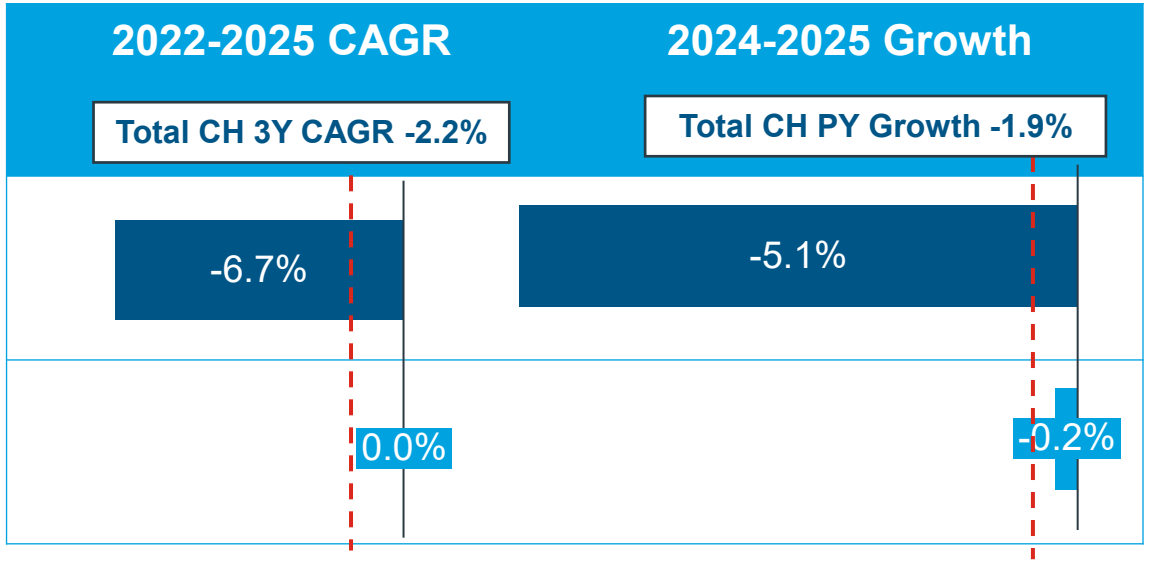
Greece CH Market Volume & Growth

Declining volumes impact the overall market

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Greece CH Performance by Classes

Medical devices account for 90% of the patient care segment's value

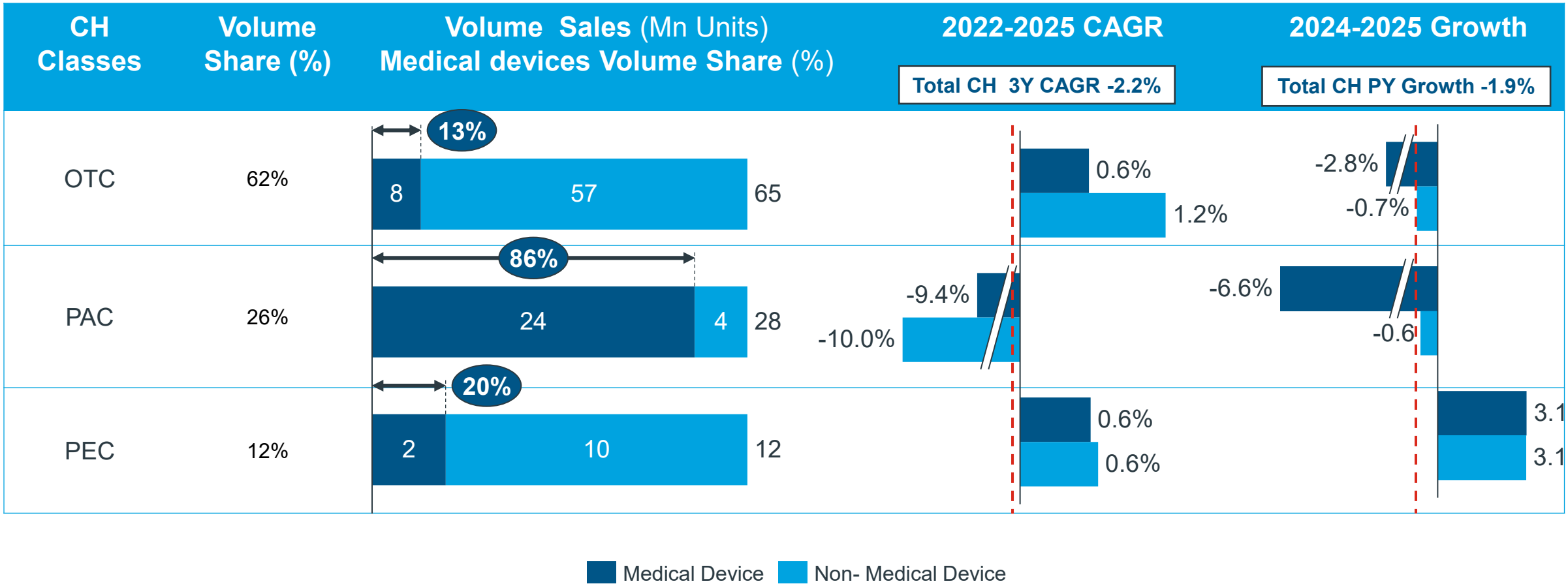
CH Classes	Value Share (%)	Value Sales (LC € Mn) Medical devices Value Share (%)	2022-2025 CAGR (Total CH 3Y CAGR 1.7%)	2024-2025 Growth (Total CH PY Growth 1.9%)
OTC	67%	17%; 95 / 477 / 572	5.5% / 7.2%	1.2% / 4.6%
PAC	23%	90%; 178 / 20 / 198	-9.7% / -10.5%	-5.4% / -0.3%
PEC	10%	23%; 19 / 65 / 84	4.8% / 3.9%	4.0% / 4.7%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Greece CH Performance by Classes

Patient Care leads in medical device volume sales as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Greece Medical Devices Packs & New Launches

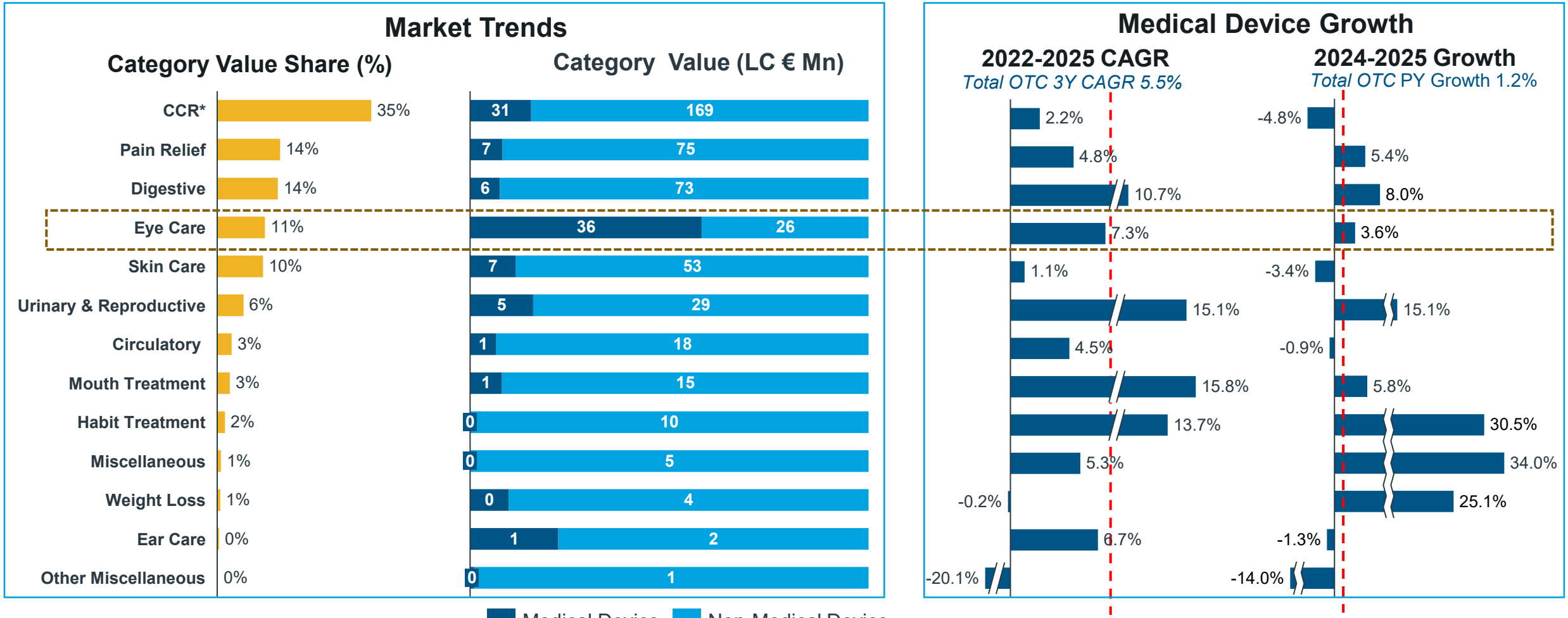
Patient care segment contributes the highest towards new medical device launches

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	4,706	7,077	**11,783**	886	1,372	**2,258**
OTC	599	2,826	**3,425**	94	536	**630**
Patient Care	3,946	1,134	**5,080**	763	196	**959**
Personal Care	161	3,117	**3,278**	29	640	**669**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Greece OTC Performance by CHC 1 Category in 2025

OTC medical devices have overall experienced growth led by eye care segment

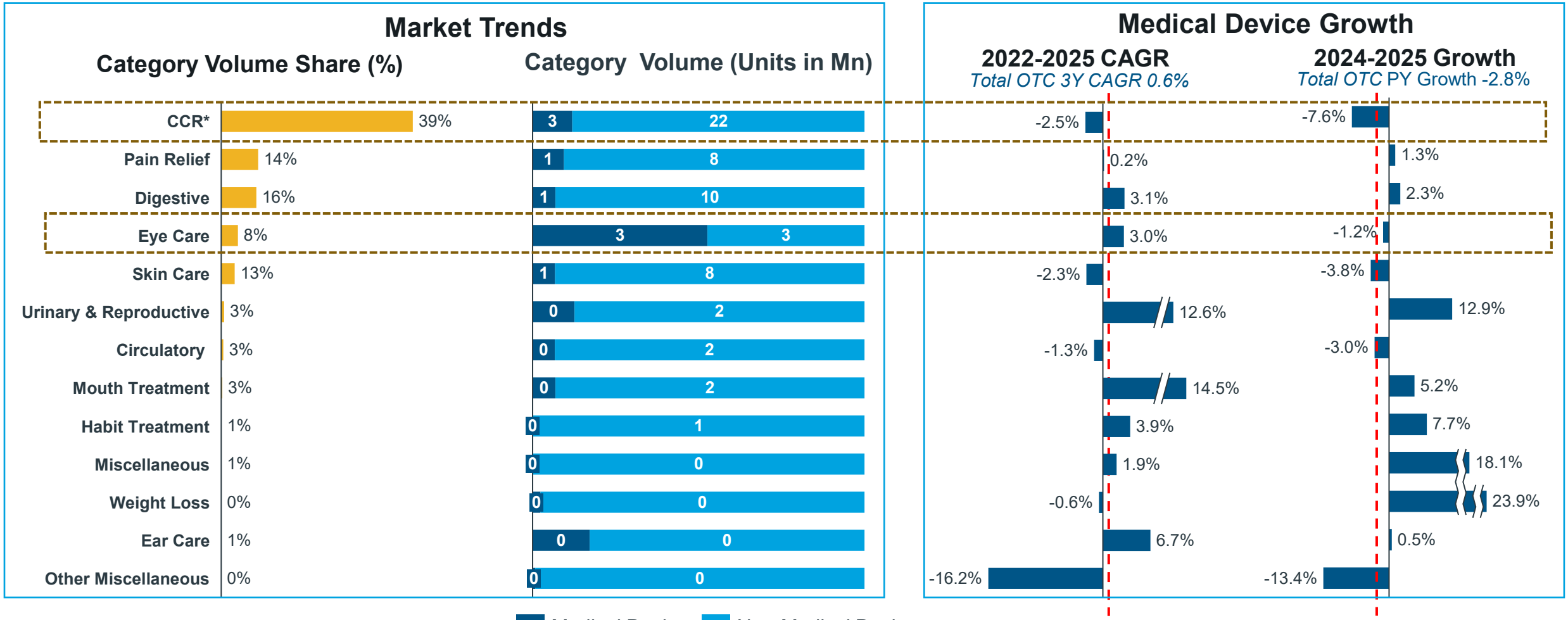


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Greece OTC Performance by CHC 1 Category in 2025

Eye care along with CCR segment leads in volumes



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Greece Medical Devices Performance by top CHC 2 Segments

Nasal saline from CCR category is the leading CHC 2 segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**94.7**	
Eye Care	38%	35.9	Not available
CCR	32%	30.6	Nasal Saline 24.0; Cough 3.7; Cold Remedies 1.8; Sore Throat 0.6
Skin Care	7%	6.8	Wound Healing 3.9; Antifungals 0.8; Scar & Keloid 0.8; Wart/Corn Removal 0.4
Pain Relief	7%	6.6	Muscular Pain 4.4; Mouth Pain 2.2; Joint Care 0.0; Dysmenorrhea 0.0
Digestive	6%	5.9	Laxatives 2.1; Antidiarrhoeals 1.8; Acid & Heartburn 1.5; Digestive 0.5
Urinary & Reproductive	6%	5.4	Urinary Condition 4.5; Gynaecological 0.7; Urology 0.2; Male Condition

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Greece Medical Devices Performance by top CHC 2 Segments

Small categories contribute to <5% of the total medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	1%	1.3	Other Mouth Treatment: 1.1; Mouth Infection: 0.2
Circulatory	1%	1.2	Antihemorrhoids: 1.2; Chloesterol Regulating: 0.0; Other Circulatory: 0.0
Ear Care	1%	0.5	Not available
Weight Loss	0%	0.4	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control: 0.0; Nail Biting: 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Greece Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**8.5**	
Eye Care	33%	2.8	Not available
CCR	36%	3.0	Nasal Saline 2.4; Cough 0.3; Cold Remedies 0.3; Sore Throat 0.1
Skin Care	7%	0.6	Wound Healing 0.3; Antifungals 0.0; Skin Protector/Emollients 0.0; Hand Skin Wound Disinfect 0.0
Pain Relief	10%	0.9	Muscular Pain 0.6; Mouth Pain 0.2; Joint Care 0.0; Dysmenorrhea 0.0
Digestive	9%	0.7	Antidiarrhoeals 0.3; Laxatives 0.3; Acid & Heartburn 0.2; Digestive 0.0
Urinary & Reproductive	3%	0.2	Urinary Condition 0.2; Gynaecological 0.0; Urology Male Condition 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Greece Medical Devices Performance by top CHC 2 Segments

Mouth treatment, circulatory and ear care segment contributes to <5% of volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	1%	0.1	Other Mouth Treatment 0.1; Mouth Infection 0.0
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Ear Care	1%	0.1	Not available
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

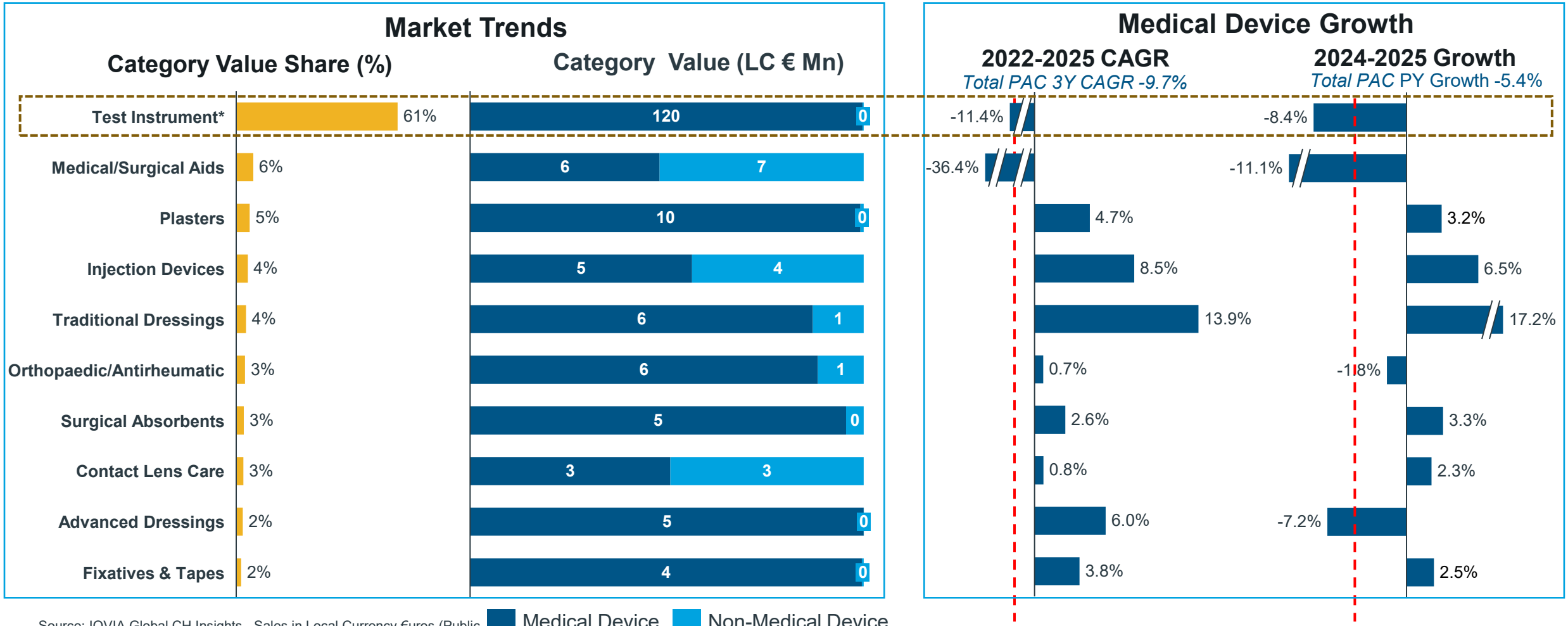
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Greece PAC Performance by CHC 1 Category in 2025 (1/2)

Test Instruments account for the majority of category values, representing a 61% share

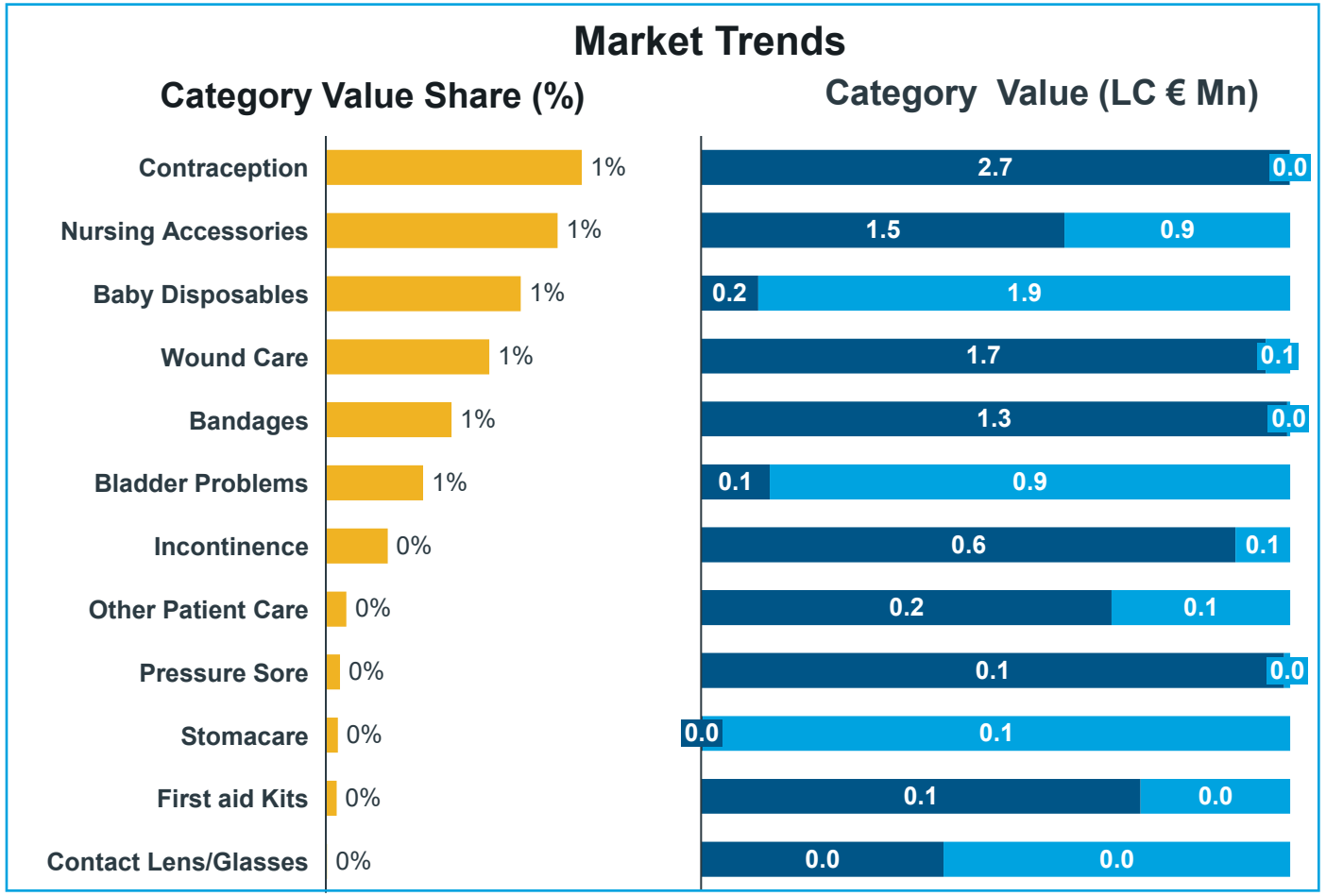


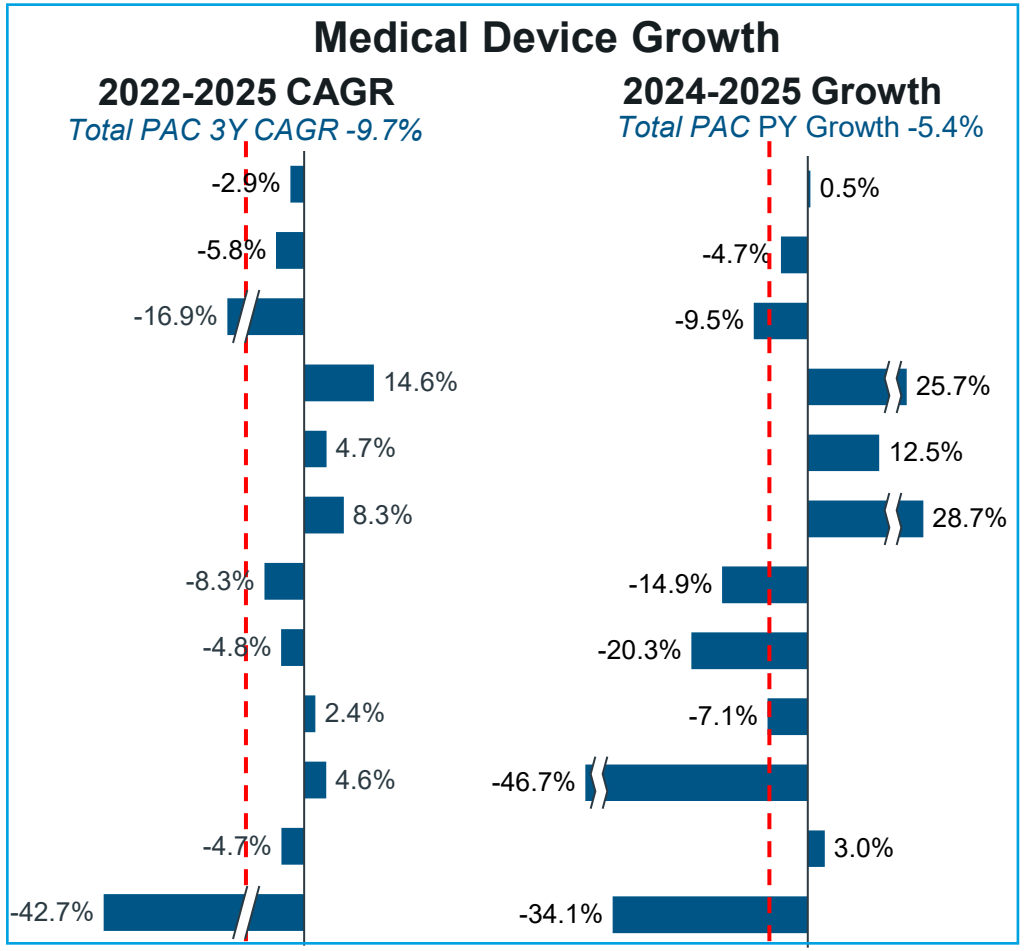
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Greece PAC Performance by CHC 1 Category in 2025 (2/2)

Wound care, bandages, and bladder-related products have experienced positive growth



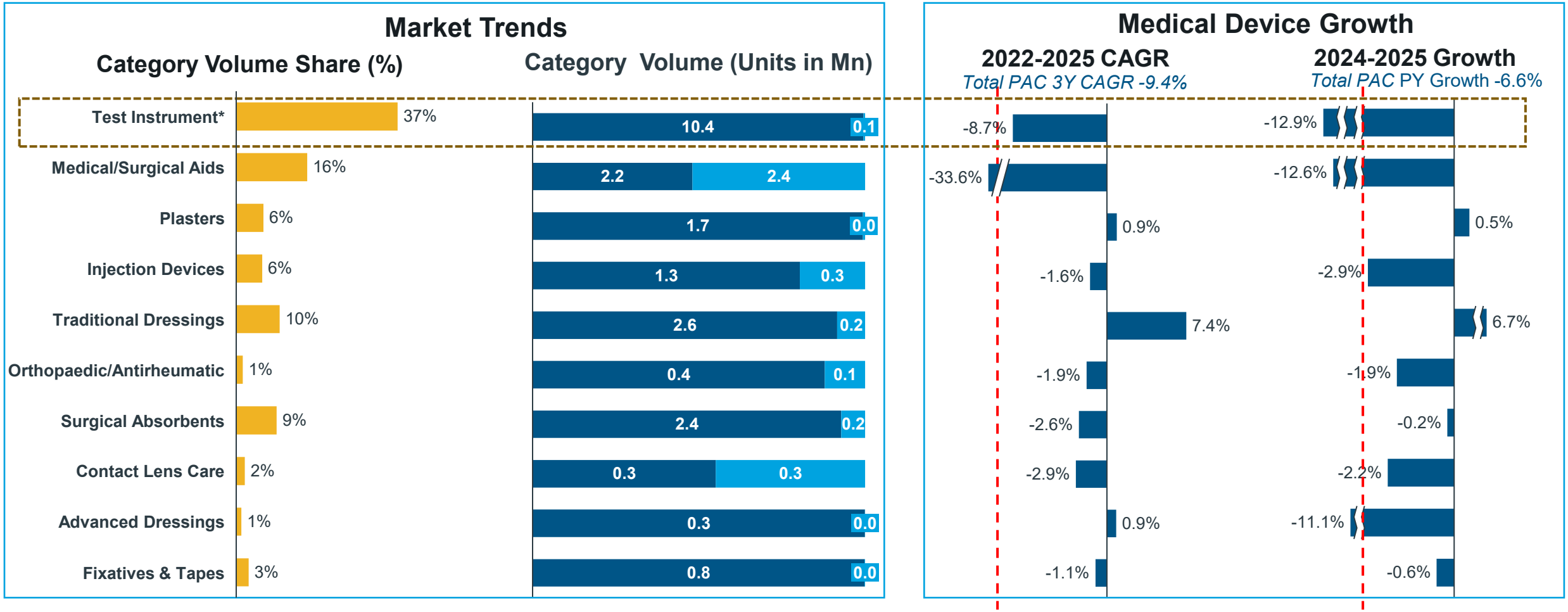


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Greece PAC Performance by CHC 1 Category (1/2)

Test instruments lead in volumes with 10.4Mn units

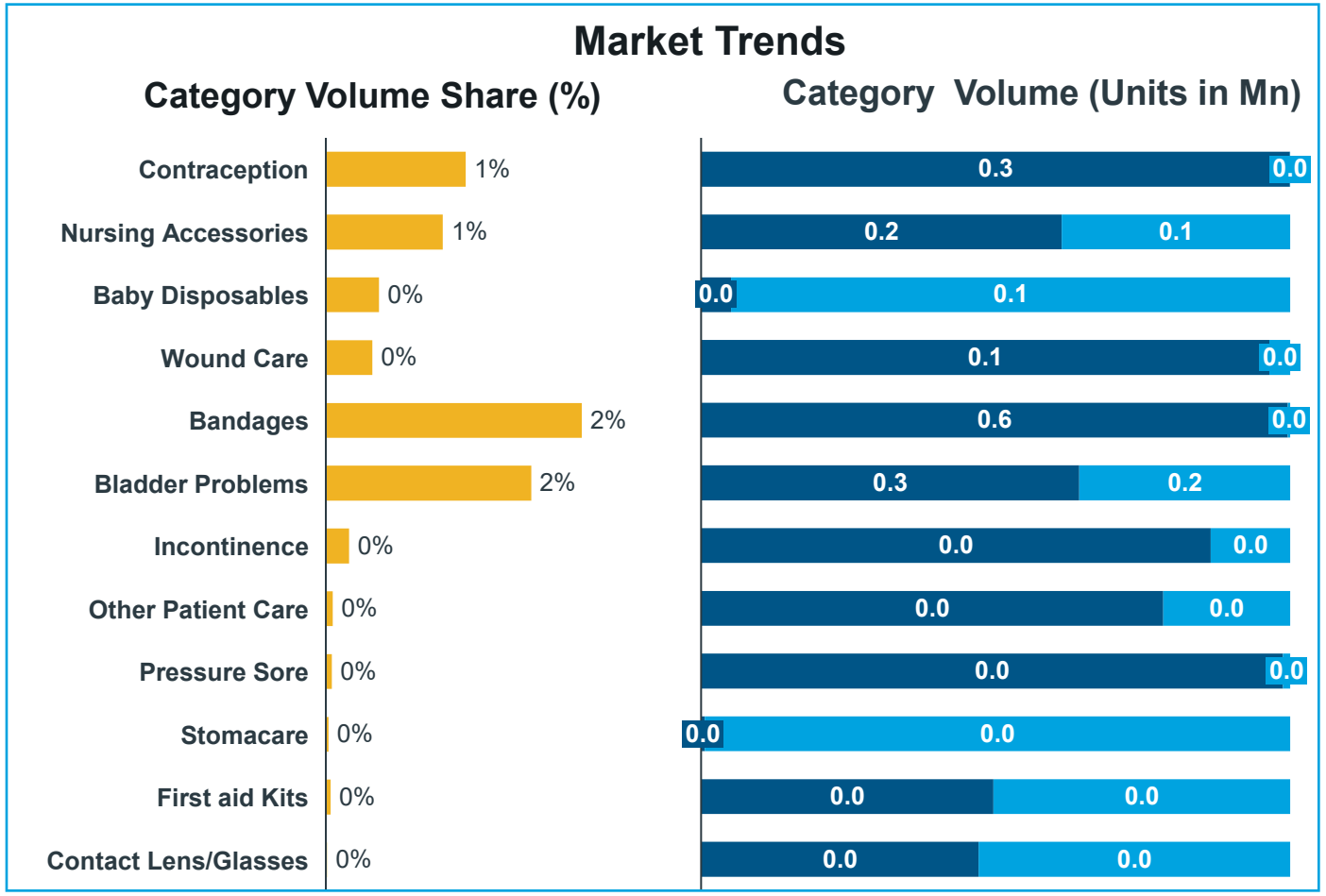


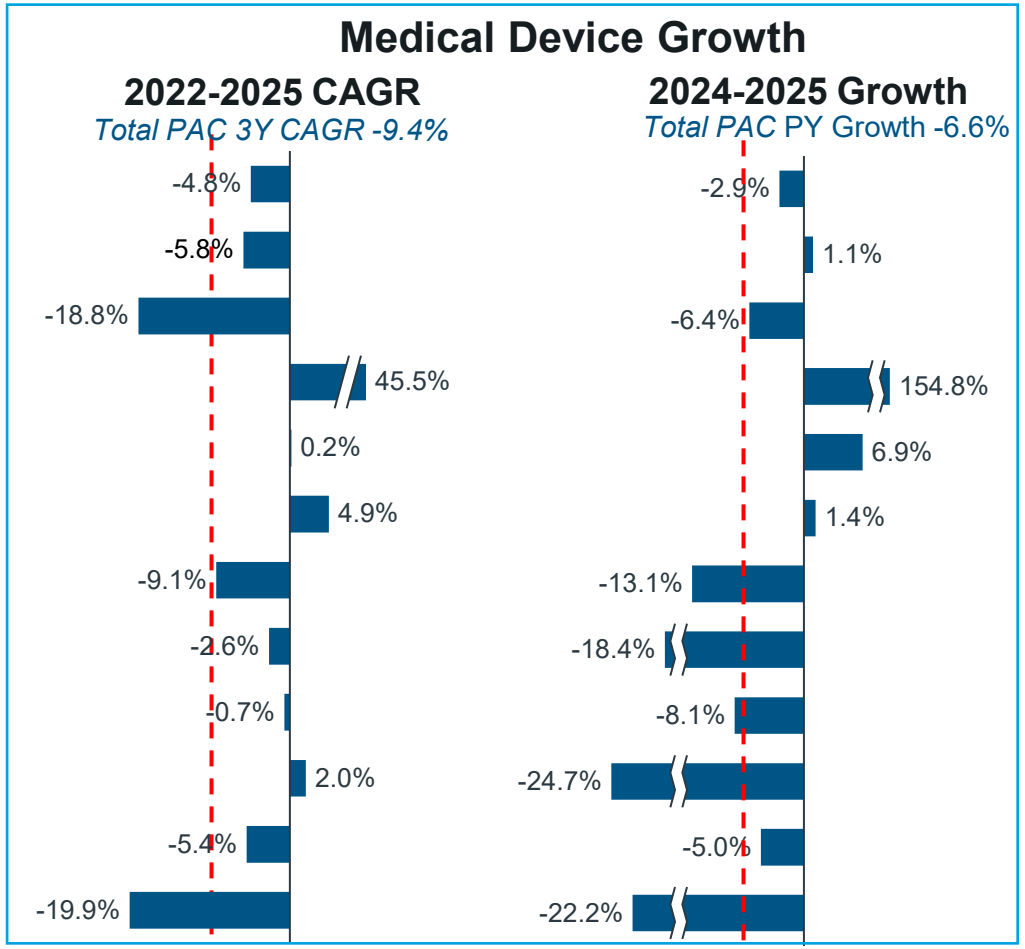
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Greece PAC Performance by CHC 1 Category (2/2)

Overall, the medical devices have declined in L-T and S-T





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

S-T – Short term

Greece Medical Devices Performance by top CHC 2 Segments

Gluc measuring is leading category in medical device values among CHC 2 segments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**178.0**	
Test Instrument	67%	119.7	Gluc Measuring 69.2; Coronavirus Test 17.8; Multipurpose Test 8.7; Blood Press Monitors 7.9
Plasters	6%	10.0	Special Plaster 5.9; Plaster Strip 3.4; Liquid Plaster 0.5; Plaster Spec. Uses 0.2
Traditional Dressings	4%	6.4	Not available
Medical/Surgical Aids	3%	6.1	Masks 2.2; Hot & Cold Packs 1.6; Gloves 0.8; Inhalation & Aerosol 0.6
Orthopaedic/ Antirheumatic	3%	5.8	Belts Other Supp 2.3; Clogs+Orthopaedic Footwear 1.7; Equiment for Disabled 0.7; Curativ/Elastic Stocking 0.6
Surgical Absorbents	3%	5.4	Swabs & Pads 4.4; Cotton wool 0.6; Packs & Patches 0.5

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Greece Medical Devices Performance by top CHC 2 Segments

Gluc measuring accounts for the highest medical device volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**24.1**	
Test Instrument	43%	10.4	Gluc Measuring 3.1; Coronavirus Test 2.7; Multipurpose Test 2.2; Lancets+Sampling 0.7
Plasters	7%	1.7	Plaster Strip 0.9; Special Plaster 0.8; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Traditional Dressings	11%	2.6	Not available
Medical/Surgical Aids	9%	2.2	Urine test 0.8; Masks 0.8; Miscellaneous 0.2; Gloves 0.2
Orthopaedic/ Antirheumatic	2%	0.4	Belts Other Supp 0.2; Clogs+Orthopaedic Footwear 0.1; Equiment for Disabled 0.1; Curativ/Elastic Stocking 0.0
Surgical Absorbents	10%	2.4	Swabs & Pads 2.0; Cotton wool 0.2; Packs & Patches 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

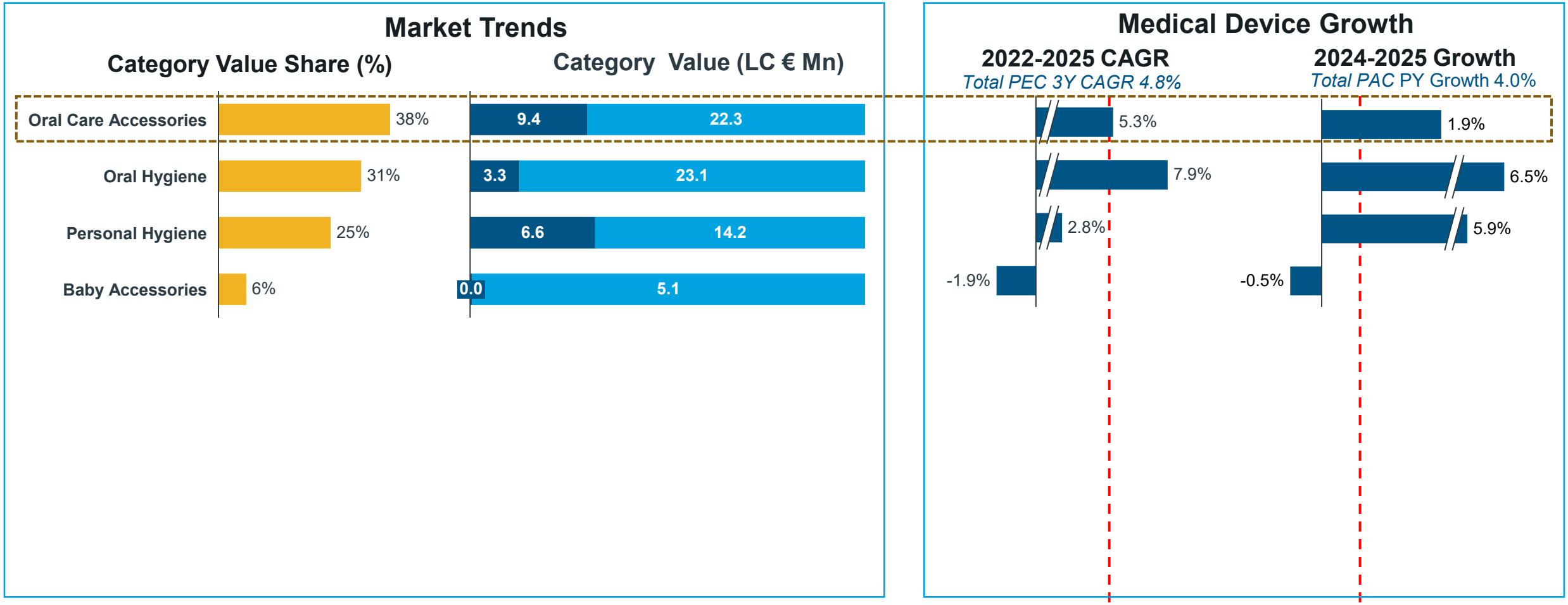
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Greece PEC Performance by CHC 1 Category

*Oral care accessories lead in category values with a 38% share and **€9.4Mn** medical device value*

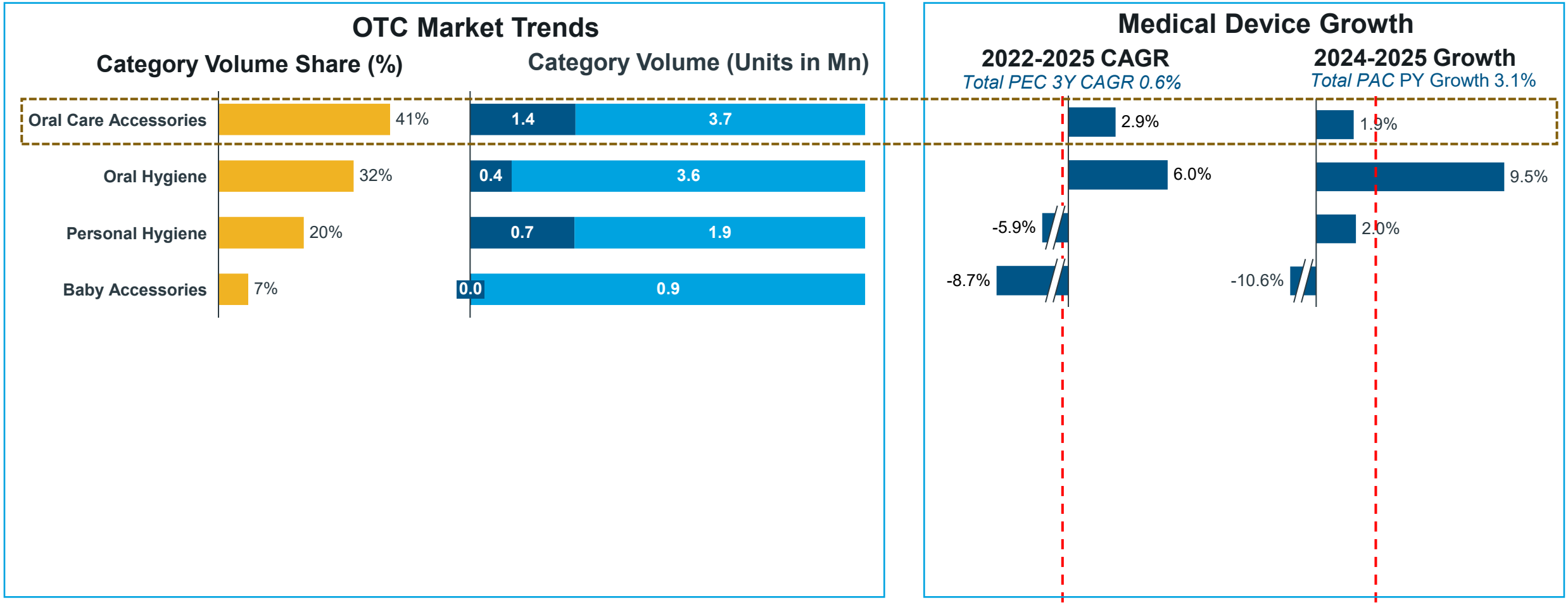


Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Greece PEC Performance by CHC 1 Category

Oral care accessories lead the volumes as well with a 41% share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Greece Medical Devices Performance by top CHC 2 Segments

*Dental products is the leading CHC 2 segment with **€9.2 Mn** in value*

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**19.3**	
Oral Care Accessories	49%	9.4	Denture Products 9.2; Toothbrushes 0.0; Dental Floss 0.0; Dental Sticks 0.1
Personal Hygiene	34%	6.6	Intimate Hygiene 6.2; Hand Hygeine w/o Soap 0.3; Foot Hygiene 0.1
Oral Hygiene	17%	3.3	Toothpastes 3.3; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Greece Medical Devices Performance by top CHC 2 Segments

Similar to values, dental products also dominate in terms of volume

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**2.4**	
Oral Care Accessories	55%	1.4	Denture Products 1.3; Toothbrushes 0.0; Dental Floss 0.0; Dental Sticks 0.0
Personal Hygiene	27%	0.7	Intimate Hygiene 0.5; Hand Hygeine w/o Soap 0.1; Foot Hygiene 0.0
Oral Hygiene	17%	0.4	Toothpastes 0.4; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Sweden Medical Devices – Market Dynamics

Sweden Medical Devices Performance Overview

Medical devices represent 30% of the CH value share, with PAC leading among the three categories

29%

Medical device share of total CH value in 2025

Long –term Growth

-5.6% by value

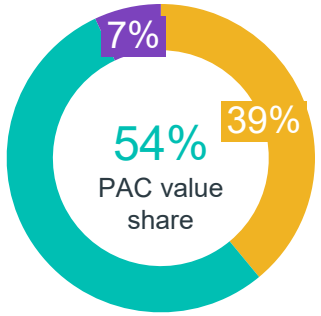
-7.0% by volume

Short –term Growth

0.8% by value

-2.2% by volume

Medical Devices – €246 Mn (2025)



Long-term Growth (Value)

-12.7%	6.9%	5.8%
PAC	OTC	PEC

Medical Devices Categories

38%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **91%** of new pack launches

Medical Devices Innovation

Test Instruments

27% *Share of total PAC values in 2025; Dominated by **Thermometers***

Long-term Growth

-31.5% by value

PAC (Patient care)

Eye Care

34% *Share for total OTC value in 2025*

Long-term Growth

8.3% by value

OTC (Over-the-Counter)

Personal Hygiene

68% *Share of total PEC value share in 2025; Dominated by **Intimate Hygiene***

Long term Growth

5.0% by value

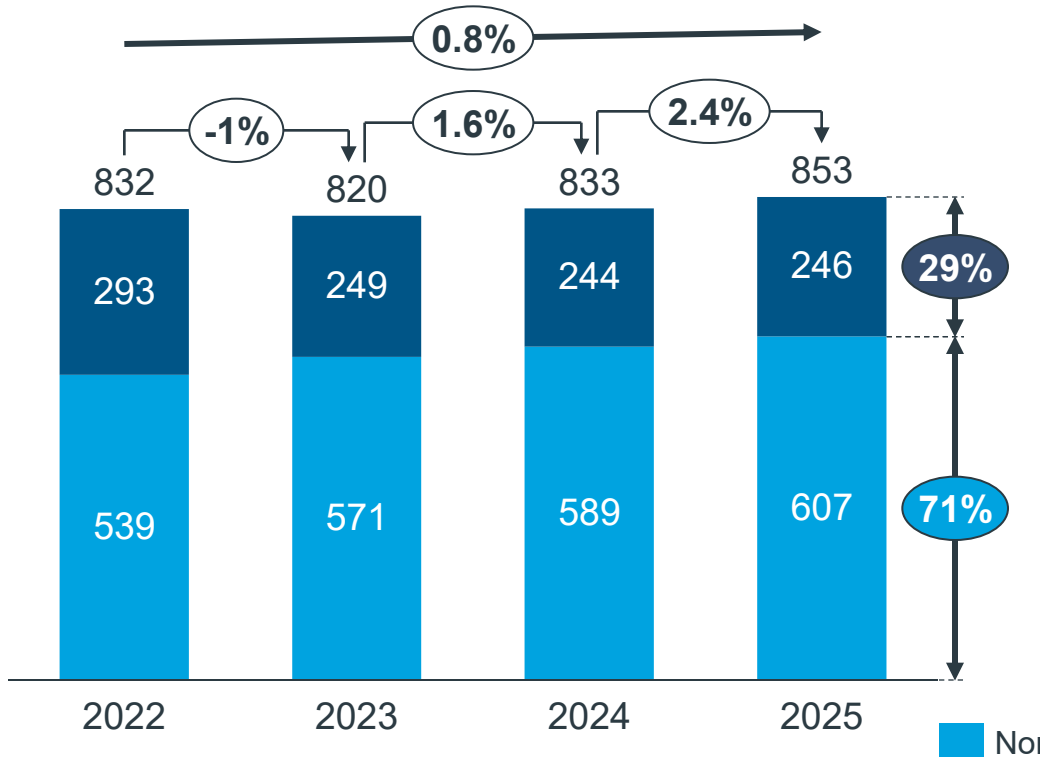
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

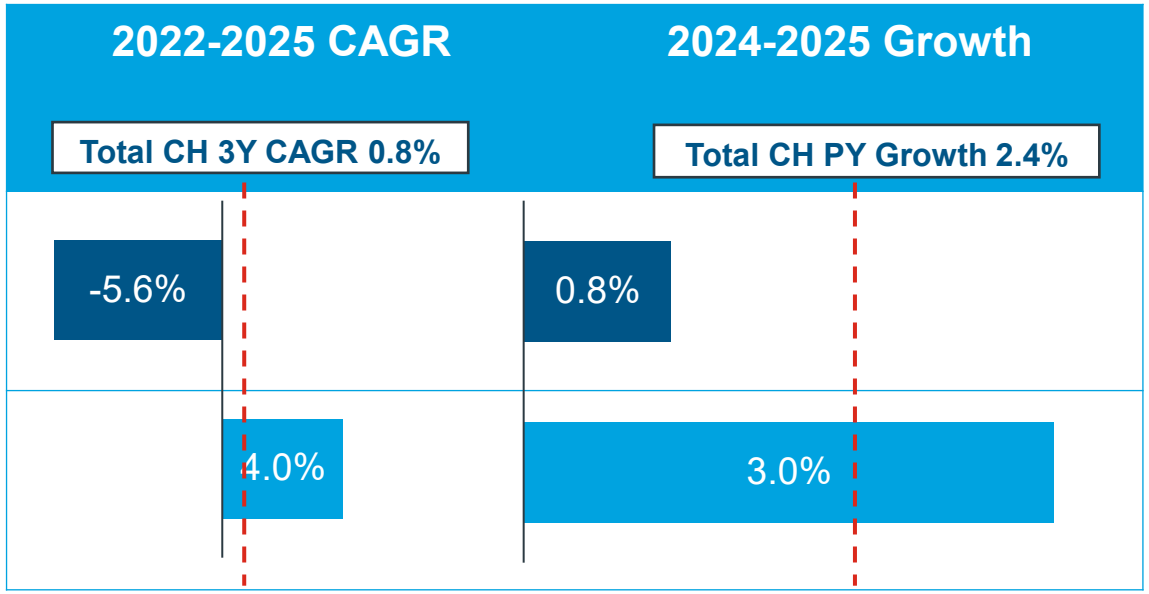
Sweden CH Market Size & Growth

Over the past year, medical devices have experienced flat growth, and the overall CH market has shown positive trends both in the short and long term

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

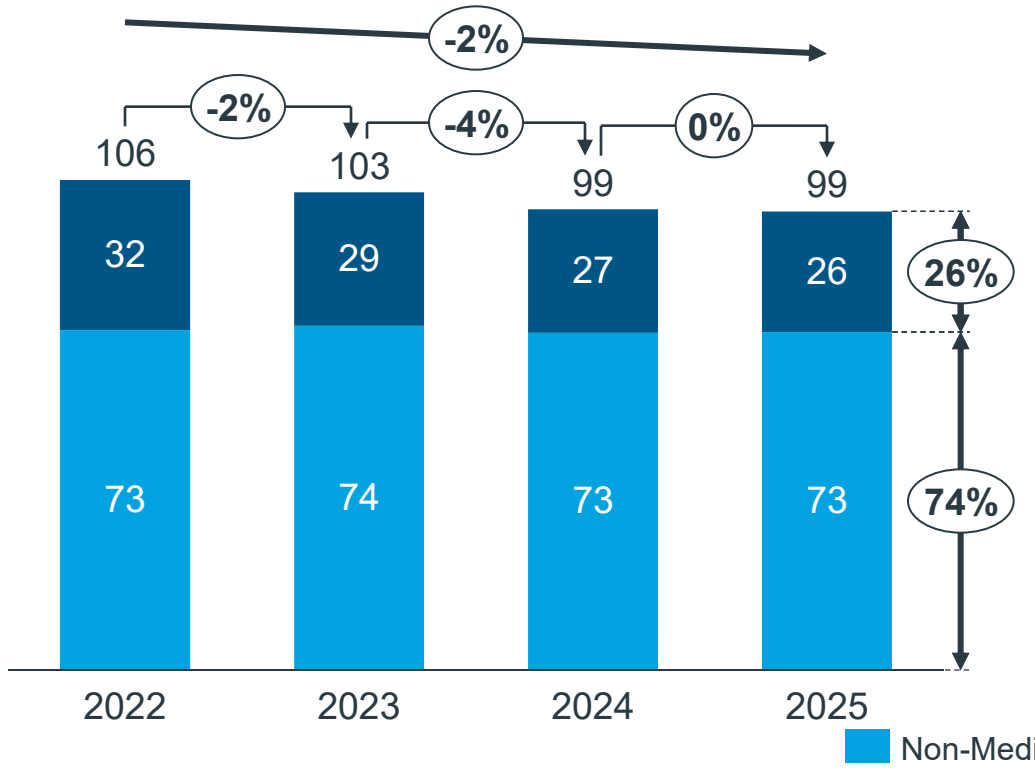


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

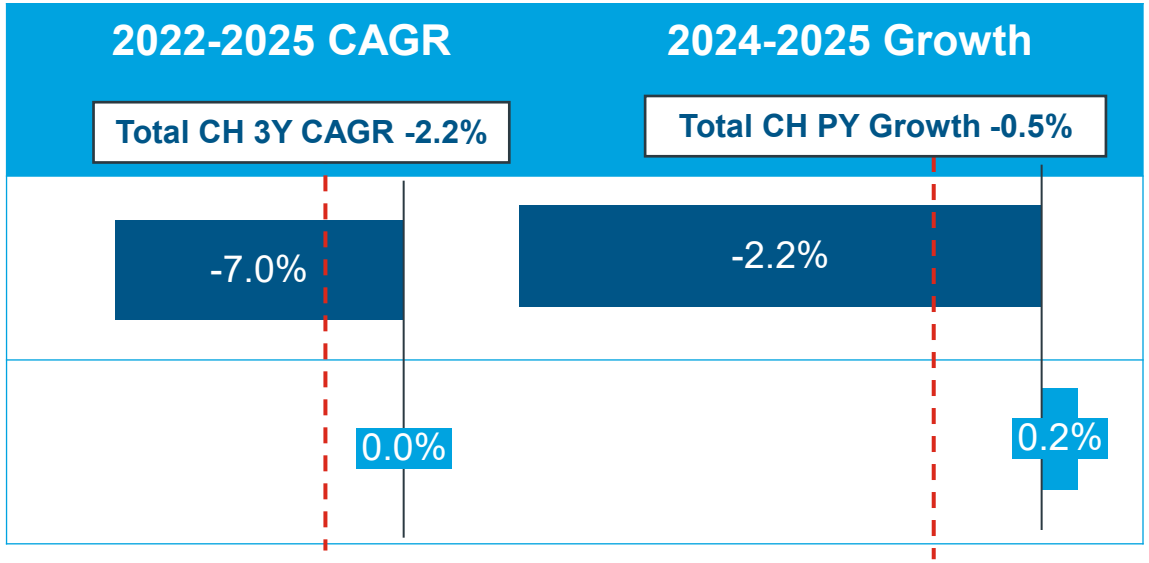
Sweden CH Market Volume & Growth

Unlike values, medical devices volumes have seen a decline in the long and short term

Market Volume (Mn Units), and Latest Volume Share (%)



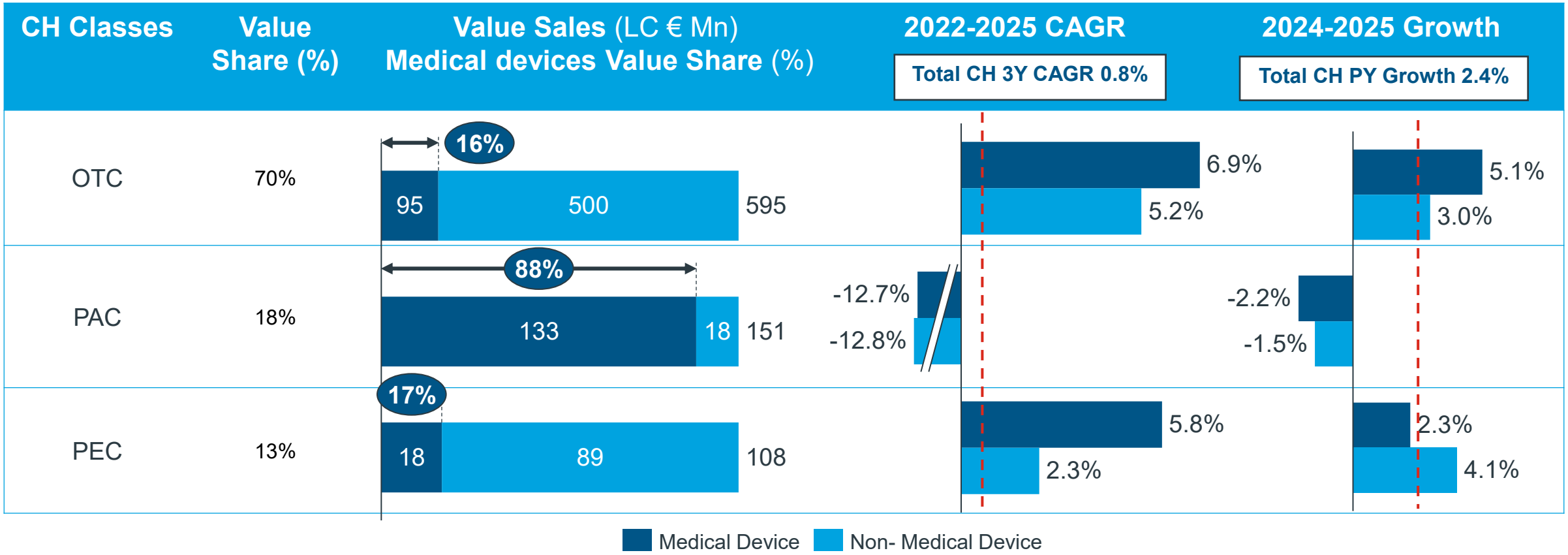
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Sweden CH Performance by Classes

PAC segment is the greatest contributor in medical device value share; however, declines in L-T and S-T

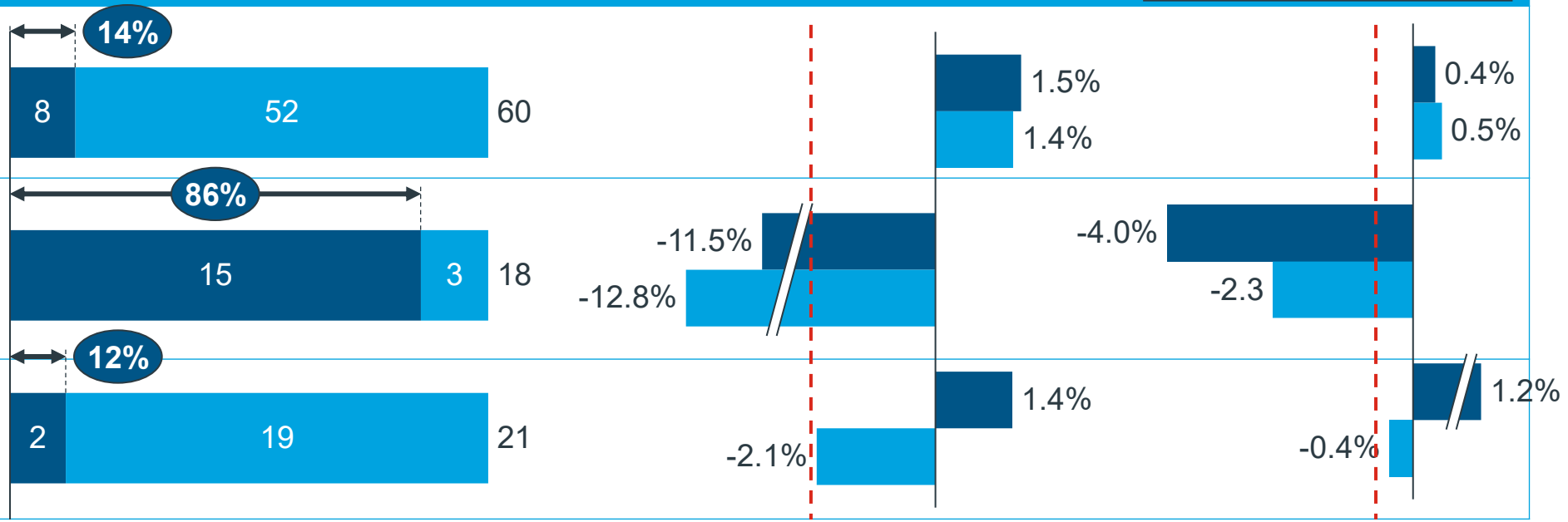


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Sweden CH Performance by Classes

Patient care leads in volumes as well; while the declining trend continues

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
OTC	61%	14%; 8; 52; 60	1.5%; 1.4%	0.4%; 0.5%
PAC	18%	86%; 15; 3; 18	-11.5%; -12.8%	-4.0%; -2.3
PEC	21%	12%; 2; 19; 21	1.4%; -2.1%	1.2%; -0.4%



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Sweden Medical Devices Packs & New Launches

Patient care segment has contributed the most to new pack launched in last 3 years

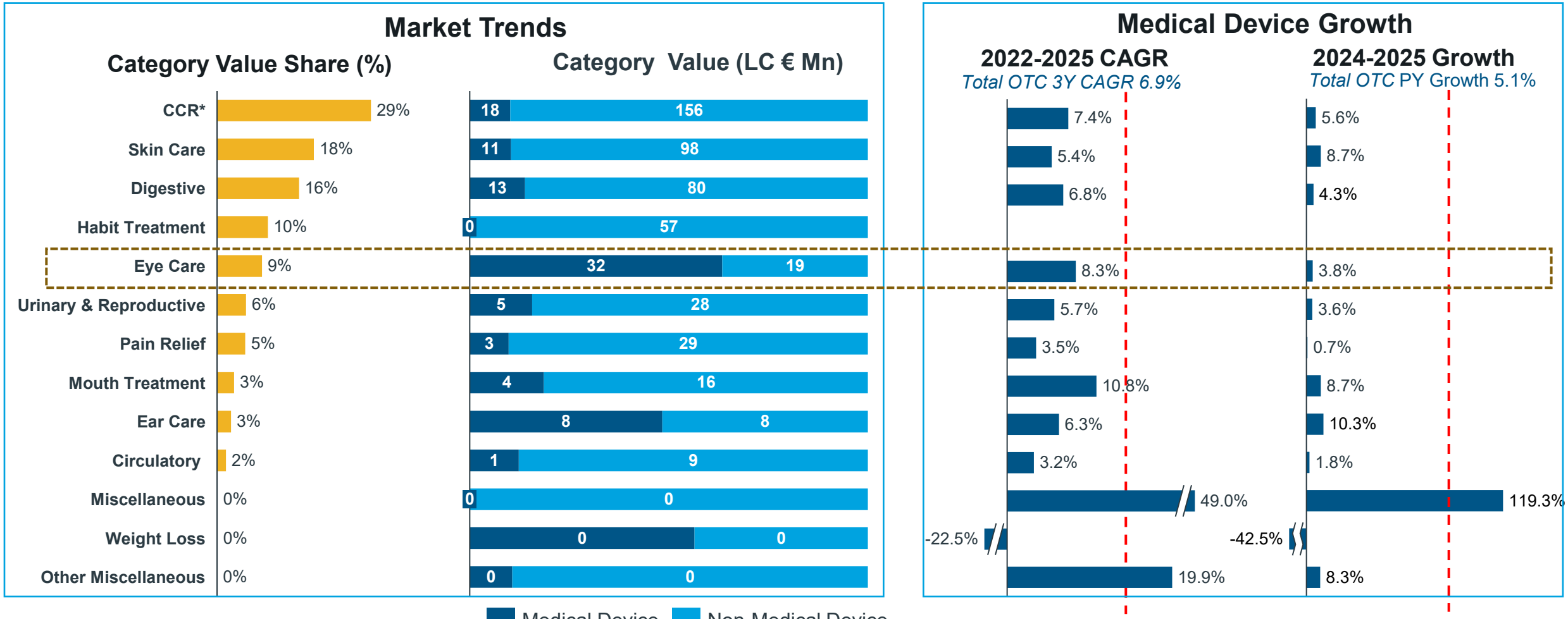
Category	Total Packs*			New Launches**		
CH Total	2,947	4,338	**7,285**	1,075	1,749	**2,824**
OTC	239	1,184	**1,423**	58	309	**367**
Patient Care	2,615	1,122	**3,737**	978	399	**1,377**
Personal Care	93	2,032	**2,125**	39	1,041	**1,080**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Sweden OTC Performance by CHC 1 Category in 2025

Eye care dominates the OTC segment with €32 Mn in value and an 8.3% CAGR over three years

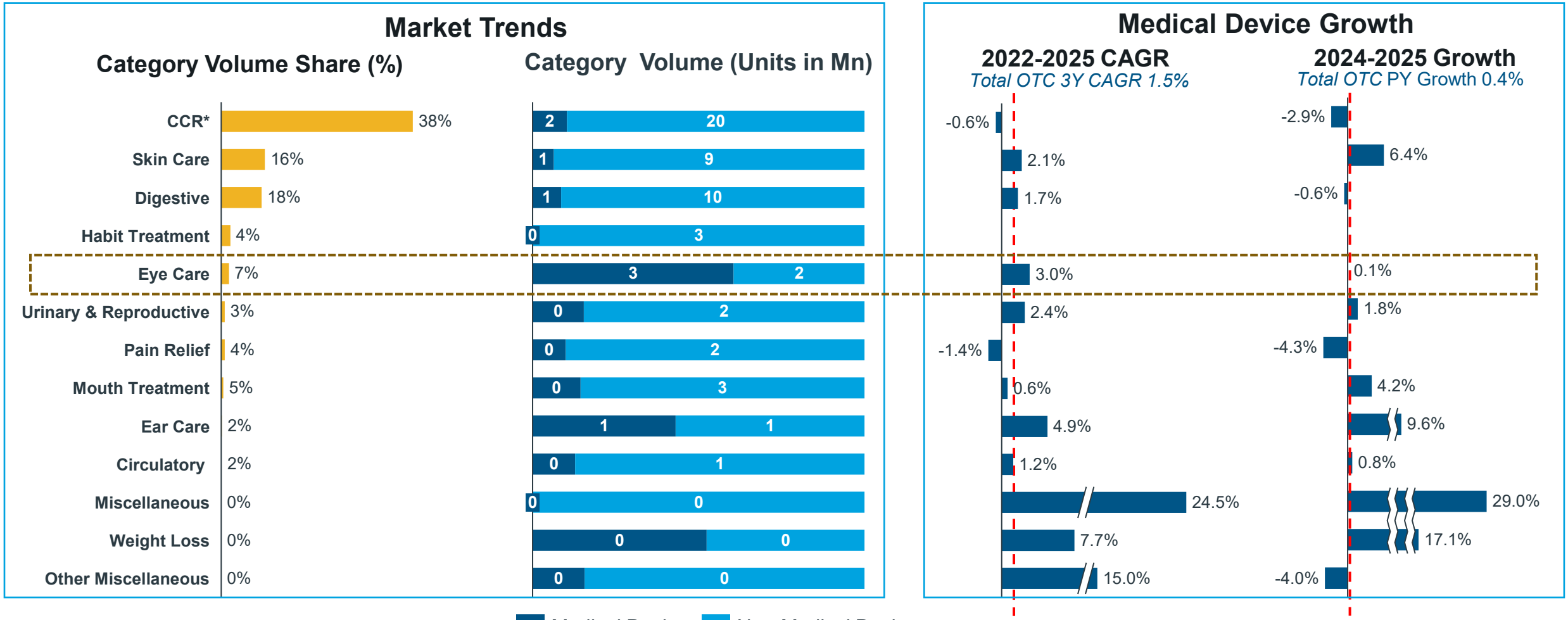


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Sweden OTC Performance by CHC 1 Category in 2025

Eye care leads in volume with 3 Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Sweden Medical Devices Performance by top CHC 2 Segments

Sore throat is the leading CHC 2 segment from CCR category with € 7.6 Mn in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**95.0**	
Eye Care	34%	32.2	Not available
CCR	19%	17.7	Sore Throat 7.6; Nasal Saline 7.1; Cough 1.2; Other Respiratory 0.9
Digestive	14%	12.9	Laxatives 8.3; Acid & Heartburn 2.5; Digestive 1.9; Antidiarrhoeals 0.2
Skin Care	12%	11.3	Wart/Corn Removal 4.5; Skin Protector/Emollients 2.6; Psoriasis 1.8; Hand Skin Wound Disinfect 1.1
Ear Care	8%	7.6	Not available
Urinary & Reproductive	5%	5.1	Gynaecological 4.7; Urinary Condition 0.5; Urology Male Condition 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Sweden Medical Devices Performance by top CHC 2 Segments

Other mouth treatments account for € 3.5 Mn in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Mouth Treatment	4%	3.6	Other Mouth Treatment 3.5; Mouth Infection 0.1; Fluoride Products 0.0
Pain Relief	3%	3.1	Muscular Pain 2.9; Mouth Pain 0.2; Joint Care 0.0; Other Pain Relief 0.0
Circulatory	1%	1.2	Antihemorrhoids 1.2; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	0%	0.2	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Sweden Medical Devices Performance by top CHC 2 Segments

In terms volume, Sore throat takes the lead

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**8.2**	
Eye Care	31%	2.6	Not available
CCR	29%	2.3	Sore Throat 1.1; Nasal Saline 1.0; Cough 0.1; Other Respiratory 0.1
Digestive	11%	0.9	Laxatives 0.5; Acid & Heartburn 0.3; Digestive 0.1; Antidiarrhoeals 0.0
Skin Care	8%	0.6	Wart/Corn Removal 0.2; Skin Protector/Emollients 0.1; Wound Healing 0.1; Psoriasis 0.1
Ear Care	7%	0.6	Not available
Urinary & Reproductive	31%	2.6	Gynaecological 0.3; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Sweden Medical Devices Performance by top CHC 2 Segments

Mouth treatment and pain relief account for only a small portion of the total medical device volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Mouth Treatment	6%	0.5	Other Mouth Treatment 0.5; Mouth Infection 0.0; Fluoride Products 0.0
Pain Relief	3%	0.3	Muscular Pain 0.2; Mouth Pain 0.0; Joint Care 0.0; Other Pain Relief 0.0
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

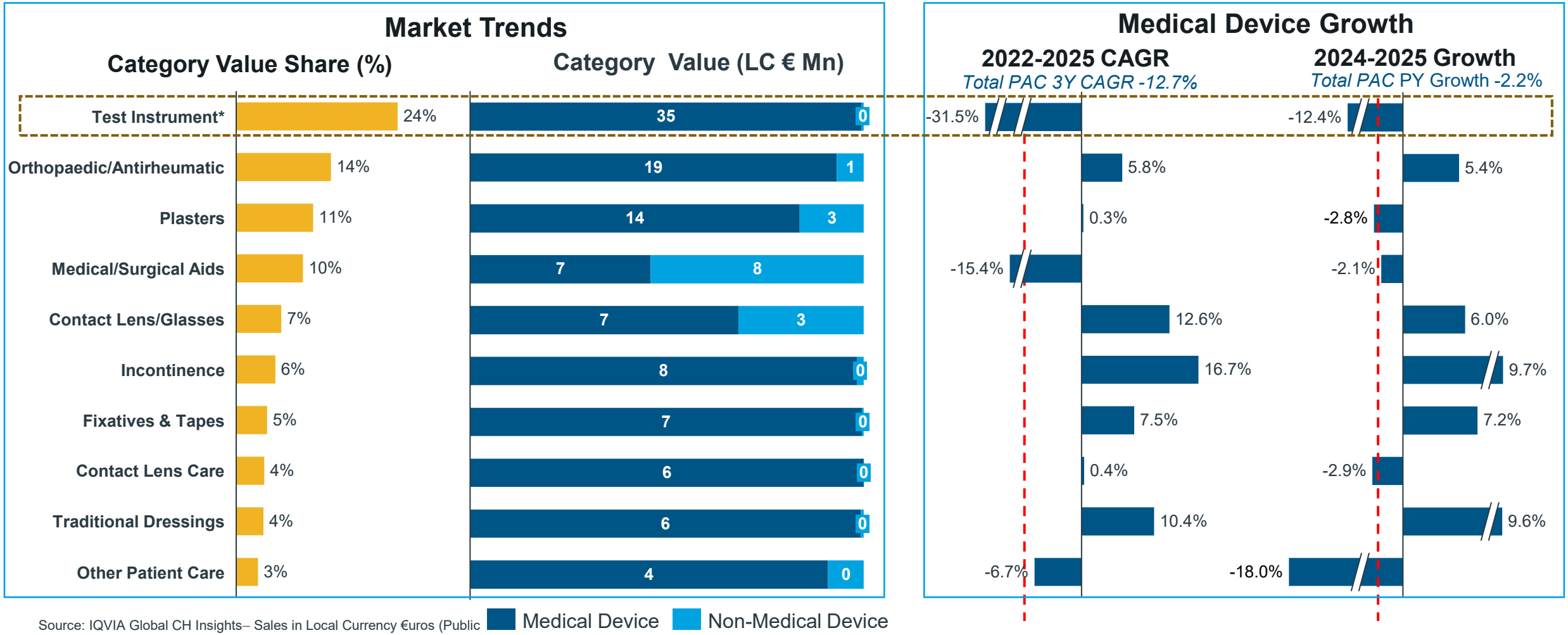
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Sweden PAC Performance by CHC 1 Category in 2025 (1/2)

Test instruments are the leading CHC 1 category contributing € 35 Mn in medical device values

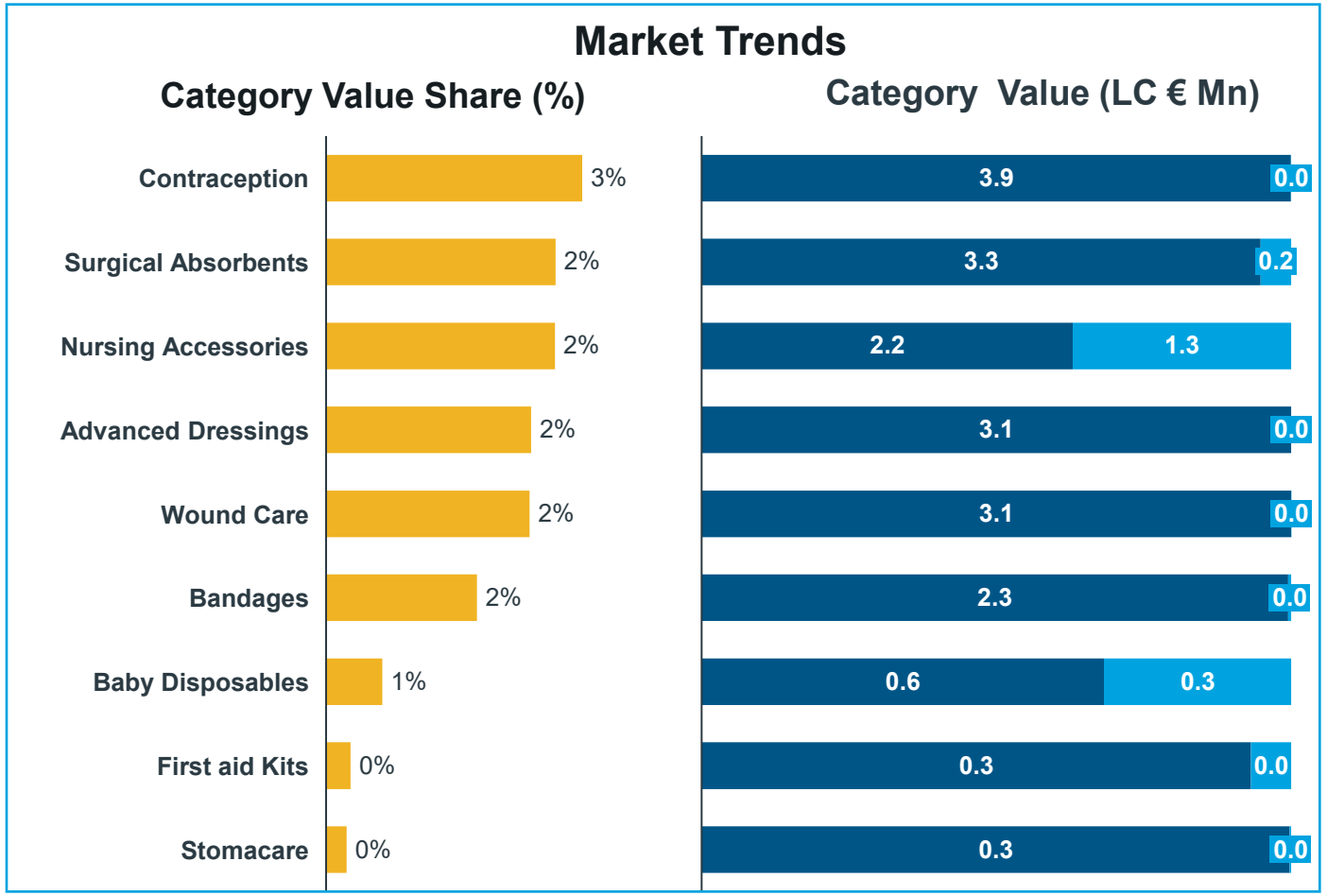


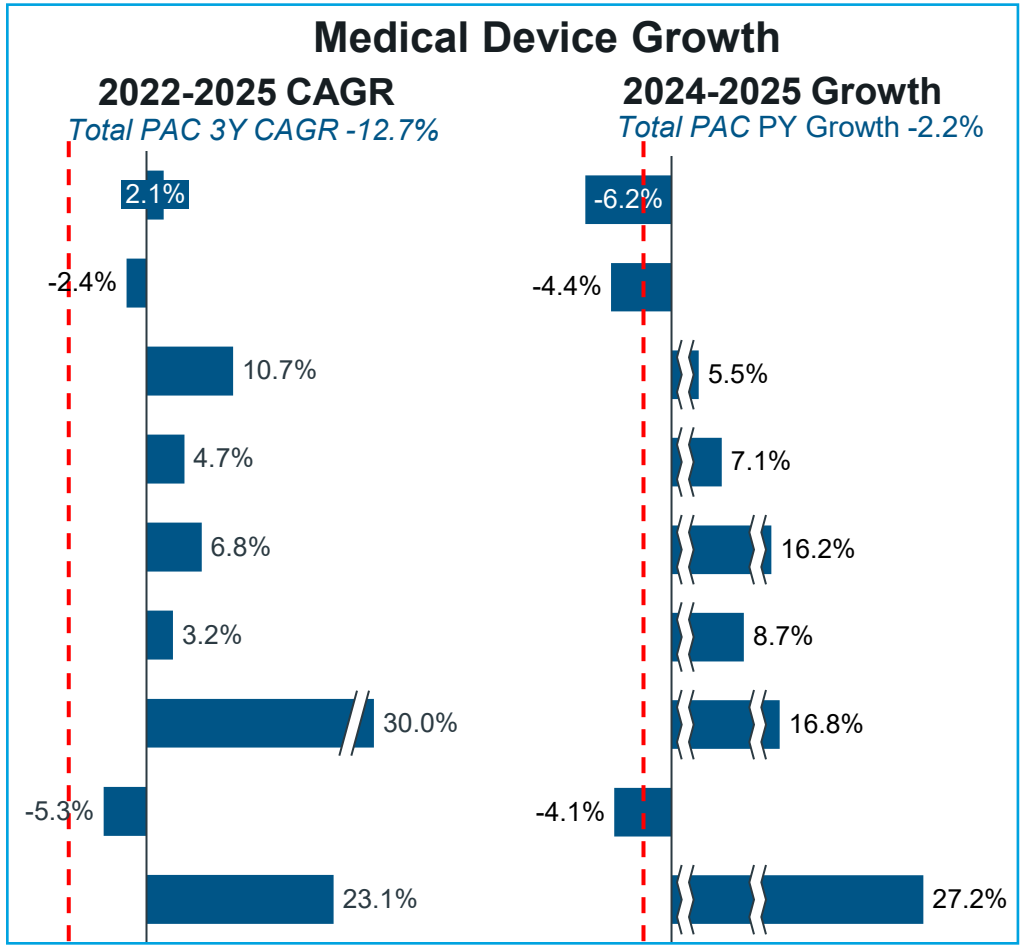
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Sweden PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like baby disposables and stomacare show impressive growth



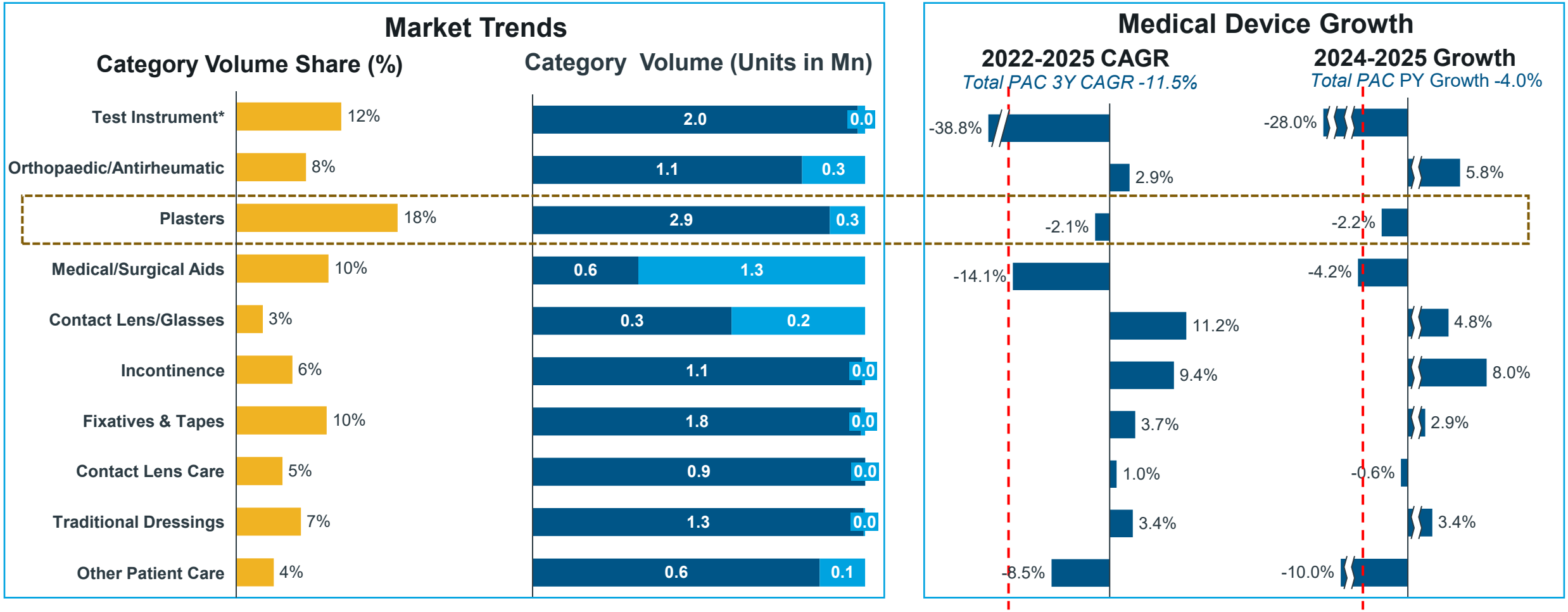


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Sweden PAC Performance by CHC 1 Category (1/2)

Plasters represent the largest medical devices from volume perspective

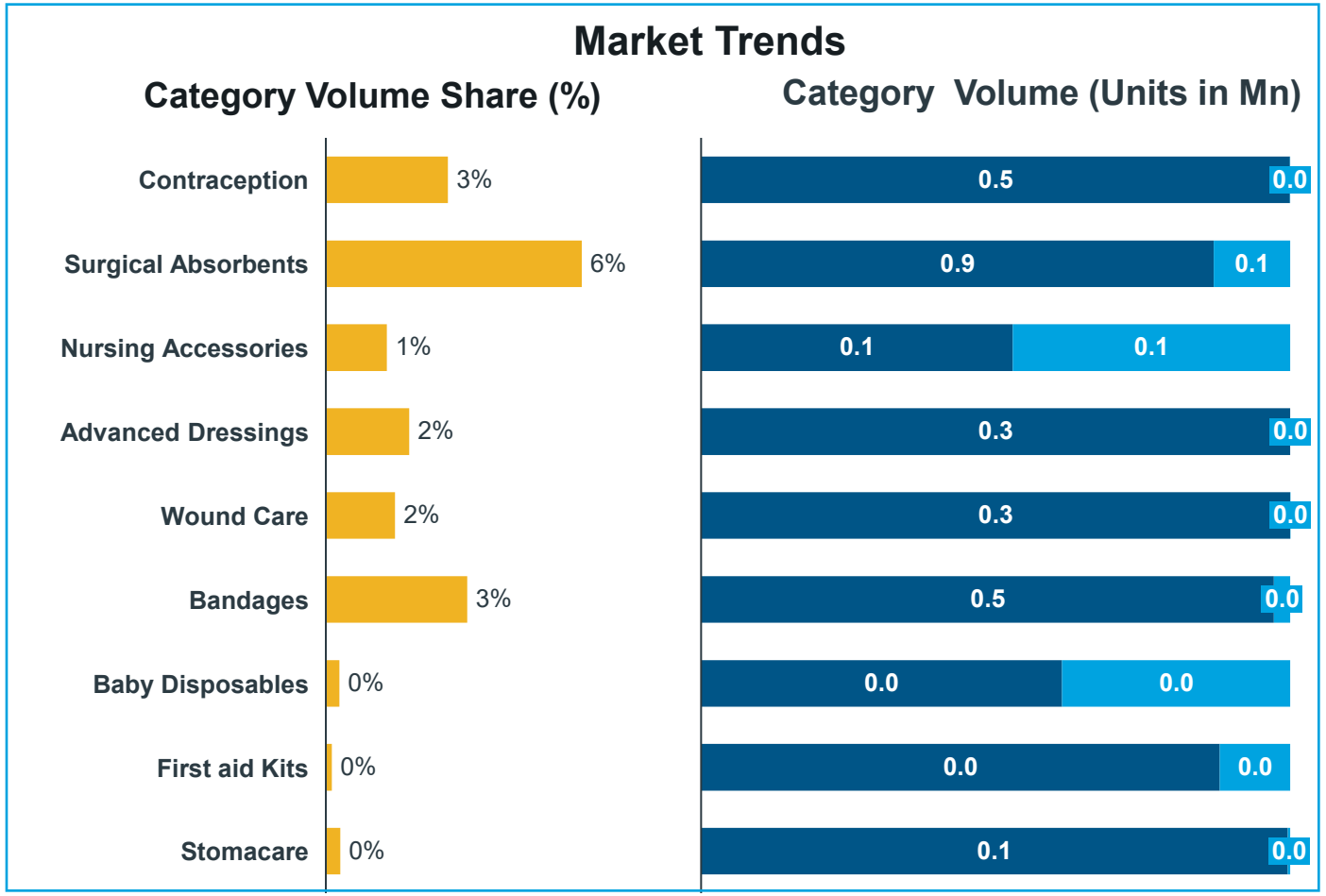


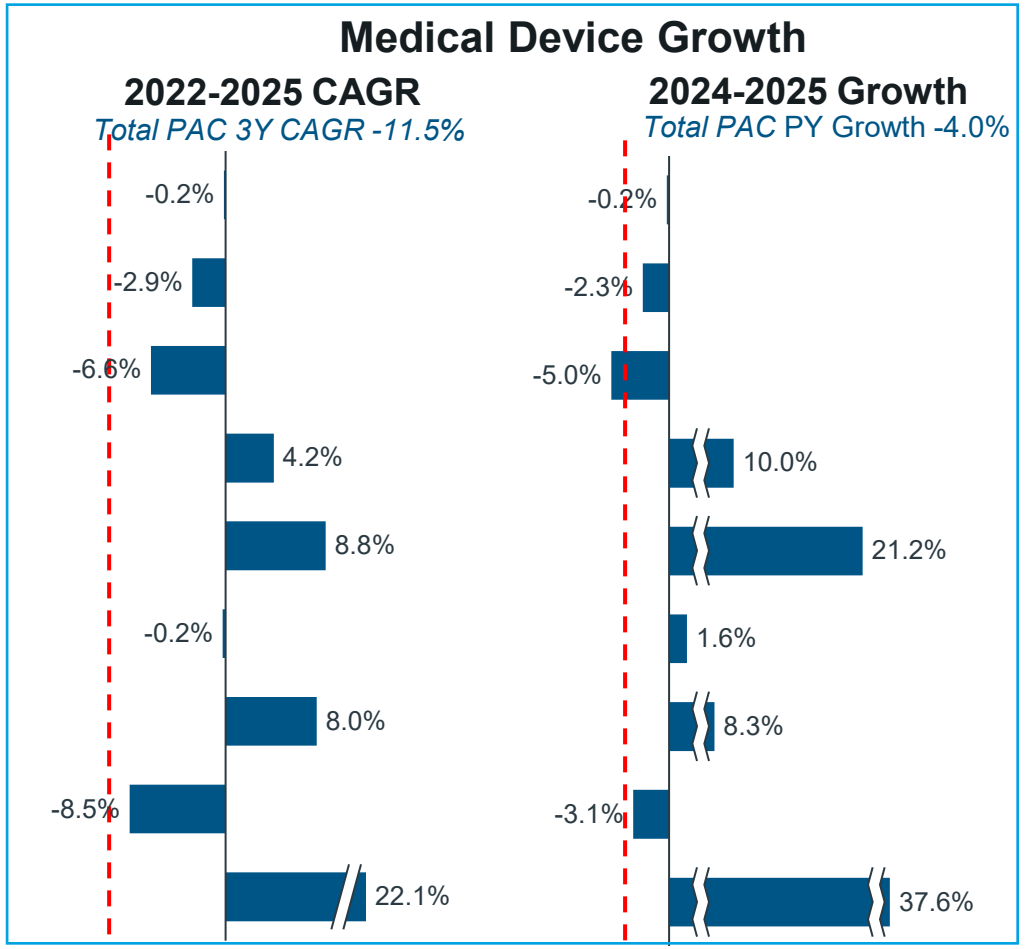
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Sweden PAC Performance by CHC 1 Category (2/2)

Most categories within the PAC have seen consistent growth





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Sweden Medical Devices Performance by top CHC 2 Segments

Thermometers and elastic stockings take the lead in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**133.2**	
Test Instrument	27%	35.3	Thermometers 9.5; Pregnancy Test 9.5; Blood Press Monitors 8.2; Coronavirus Test 2.6
Orthopaedic/ Antirheumatic	15%	19.4	Curativ/Elastic Stocking 9.9; Belts Other Supp 6.1; Clogs+Orthopaedic Footwear 2.4; Equiment for Disabled 0.6
Plasters	11%	14.2	Special Plaster 8.8; Plaster Strip 4.7; Liquid Plaster 0.5; Plaster Spec. Uses 0.2
Incontinence	6%	8.4	Mod Heav Sev Incont. 6.1; Light Incontinence 2.0; Bed Sheets/Pads 0.3
Contact Lens/Glasses	5%	6.8	Contact Lens/Acces. 6.8; Glasses & Acces. 0.0
Fixatives & Tapes	5%	6.8	Adhesive Tapes 4.1; Specical Tapes 2.7

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Sweden Medical Devices Performance by top CHC 2 Segments

Plaster strips lead in volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**15.4**	
Test Instrument	13%	2.0	Pregnancy Test 0.8; Coronavirus Test 0.4; Thermometers 0.4; Blood Press Monitors 0.1
Orthopaedic/ Antirheumatic	7%	1.1	Curativ/Elastic Stocking 0.6; Belts Other Supp 0.3; Clogs+Orthopaedic Footwear 0.2; Equiment for Disabled 0.0
Plasters	19%	2.9	Plaster Strip 1.6; Special Plaster 1.2; Plaster Spec. Uses 0.0; Liquid Plaster 0.0
Incontinence	7%	1.1	Mod Heav Sev Incont. 0.7; Light Incontinence 0.4; Bed Sheets/Pads 0.0
Contact Lens/Glasses	2%	0.3	Contact Lens/Acces. 0.3; Glasses & Acces. 0.0
Fixatives & Tapes	12%	1.8	Adhesive Tapes 1.3; Specical Tapes 0.5

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

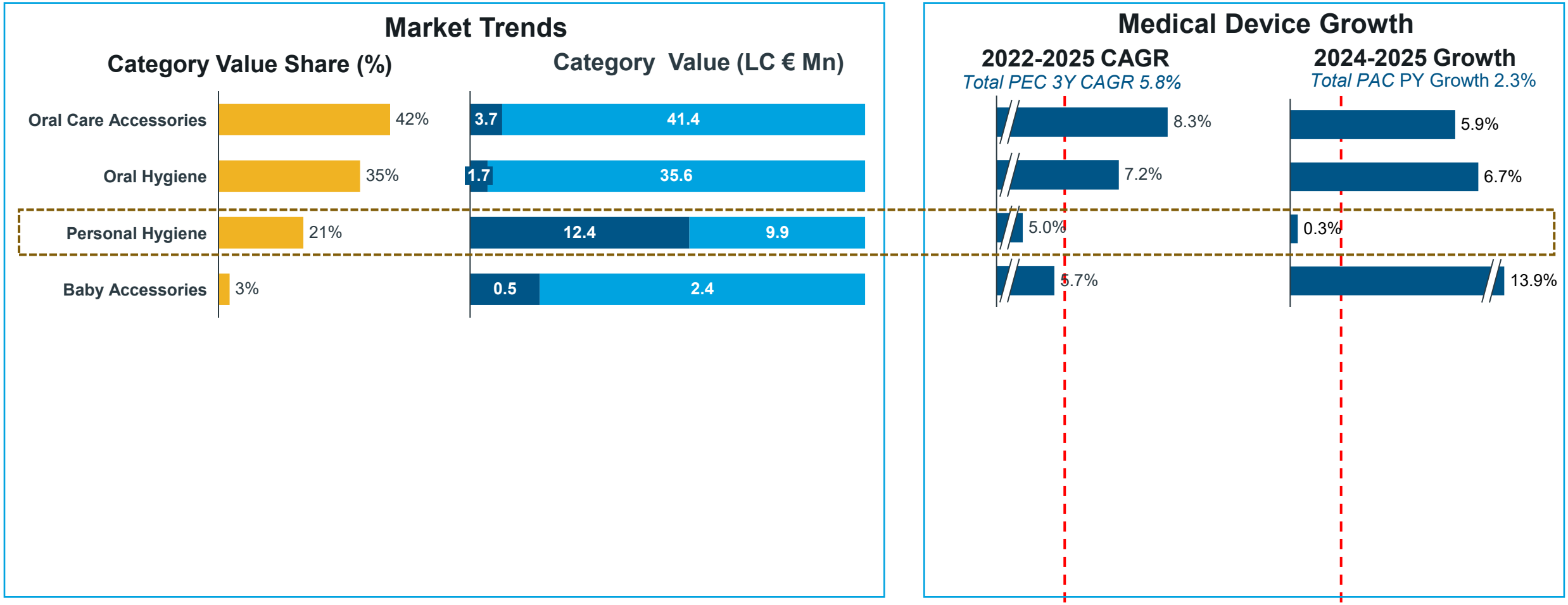
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Sweden PEC Performance by CHC 1 Category

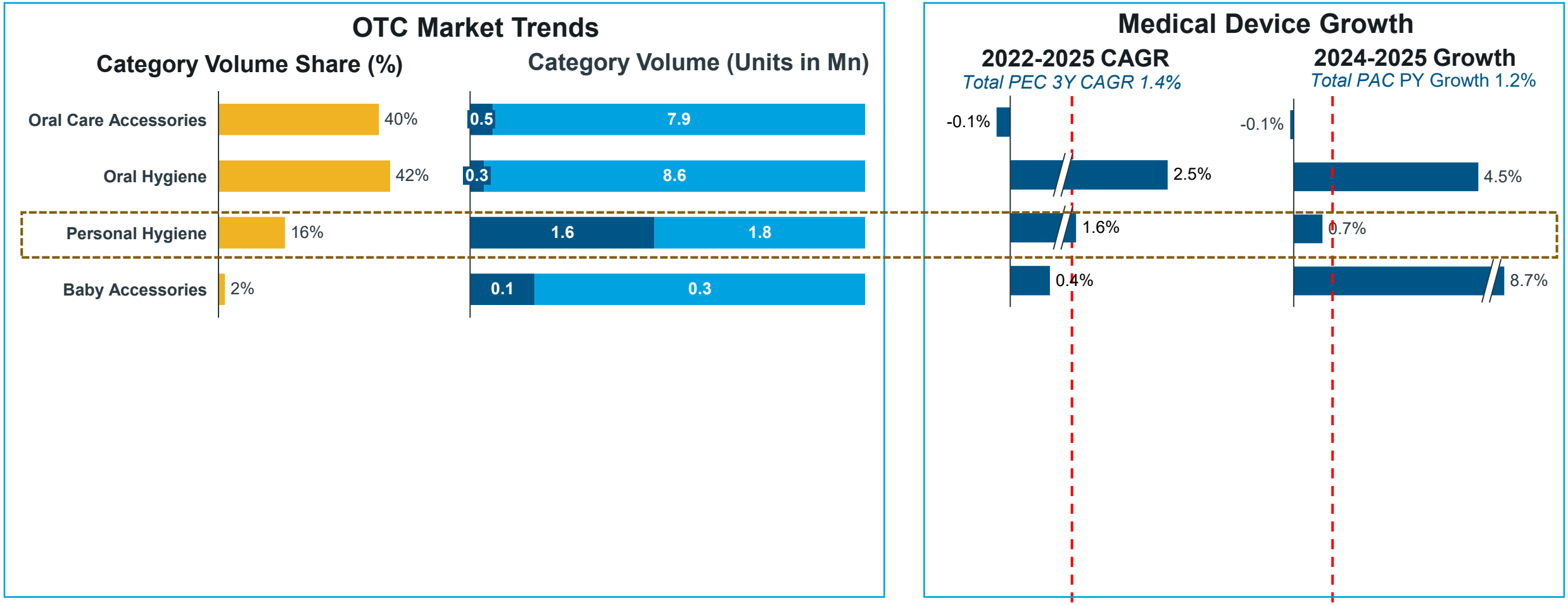
Personal hygiene has the highest medical device values at € 12.4 Mn



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Sweden PEC Performance by CHC 1 Category

Personal hygiene category continues to dominate in terms of volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Sweden Medical Devices Performance by top CHC 2 Segments

Intimate hygiene lead with €12.4 Mn in medical device value

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**18.2**	
Personal Hygiene	68%	12.4	Intimate Hygiene 12.4; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	20%	3.7	Denture Products 3.0; Other Oral Care Acces. 0.7; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	9%	1.7	Toothpastes 1.3; Other Oral Care 0.3; Mouthwashes 0.1
Baby Accessories	3%	0.5	Dummies/Pacifiers/Teeth 0.4; Feeding Bottles &Acces. 0.1

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Sweden Medical Devices Performance by top CHC 2 Segments

Denture products lead in volume

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**2.5**	
Personal Hygiene	66%	1.6	Intimate Hygiene 1.6; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	20%	0.5	Denture Products 0.5; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	13%	0.3	Toothpastes 0.3; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	2%	0.1	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Austria Medical Devices – Market Dynamics

Austria Medical Devices Performance Overview

Medical devices has grown at 4.1% by value in the past three years with OTC showing the highest market penetration

23%

Medical device share of total CH value in 2025

Long –term Growth

4.1% by value

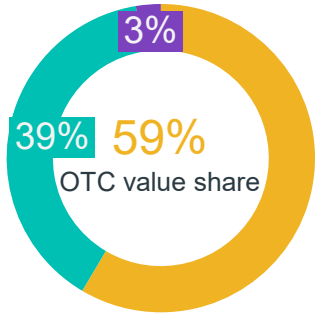
0.2% by volume

Short –term Growth

2.2% by value

-0.6% by volume

Medical Devices – €242 Mn (2025)



Long-term Growth (Value)

6.1% OTC

1.2% PAC

6.4% PEC

Medical Devices Categories

42%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **89%** of new pack launches

Medical Devices Innovation

Test Instruments

23% Share of total PAC values in 2025; Dominated by **Gluc Measuring**

Long-term Growth

-5.5% by value

PAC (Patient care)

Eye Care

31% *Share for total OTC value in 2025*

Long-term Growth

6.6% by value

OTC (Over-the-Counter)

Oral Care Accessories

83% *Share of total PEC value share in 2022; Dominated by **Intimate hygiene***

Long term Growth

6.9% by value

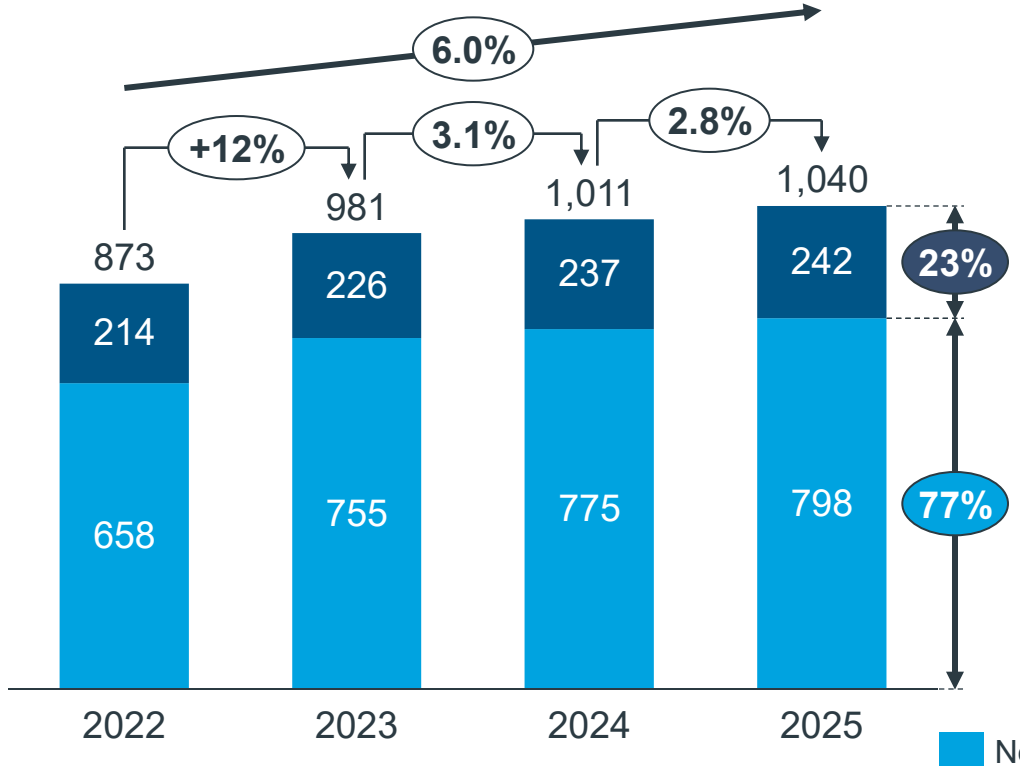
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

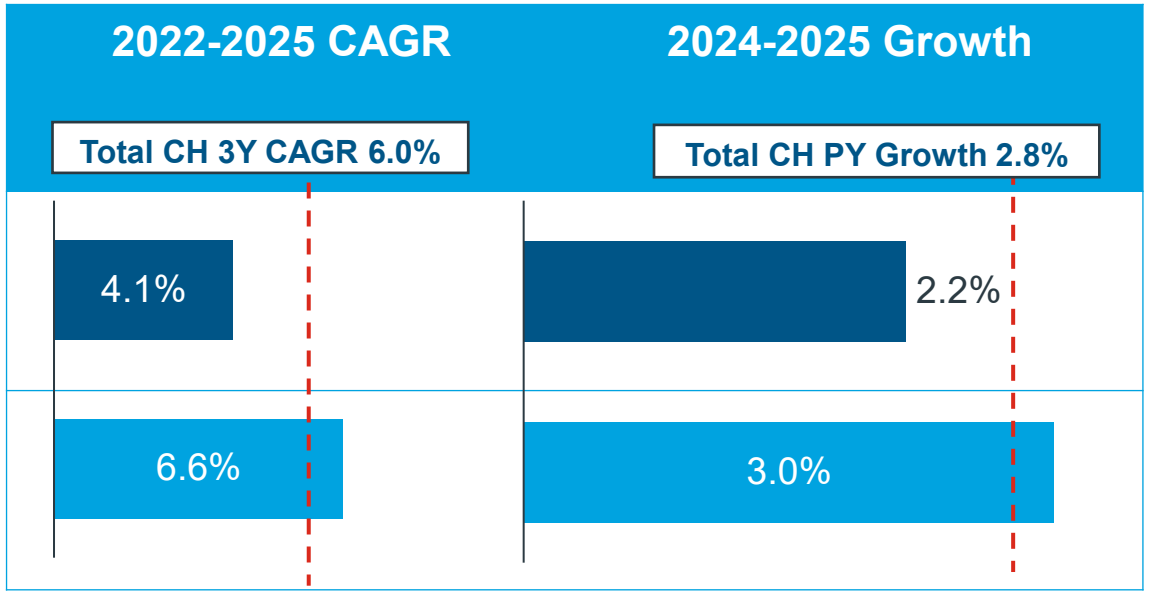
Austria CH Market Size & Growth

Both medical and non-medical device sectors are growing, with medical devices accounting for about 23% of total CH value shares, equaling €1.0 billion in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

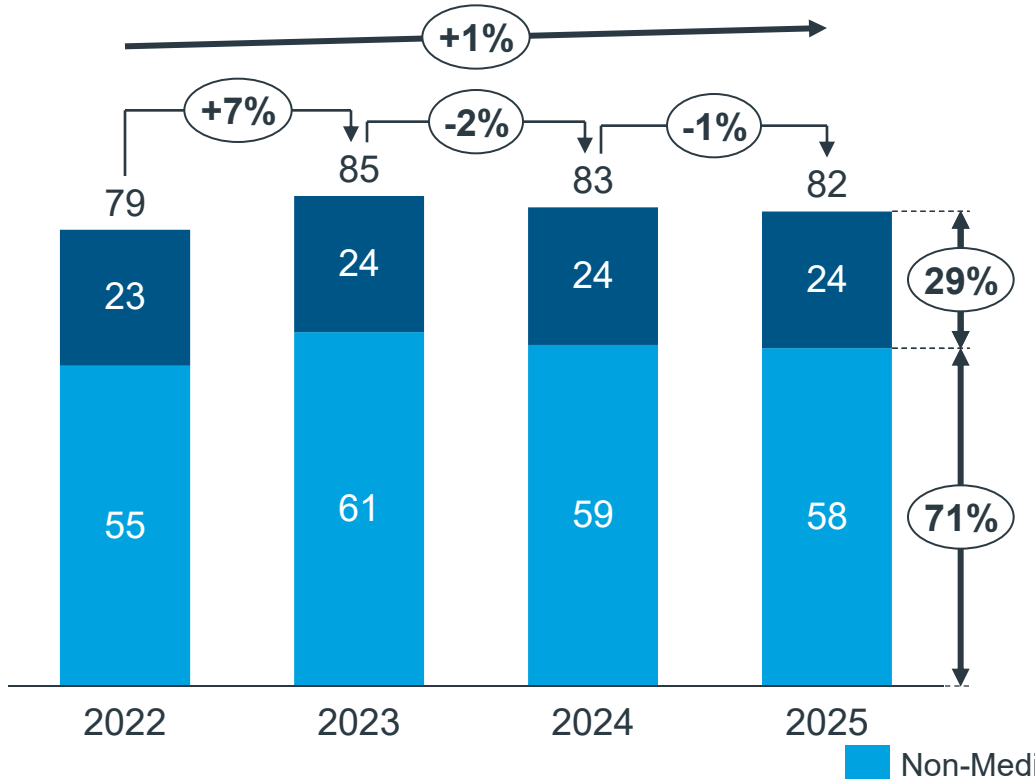


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

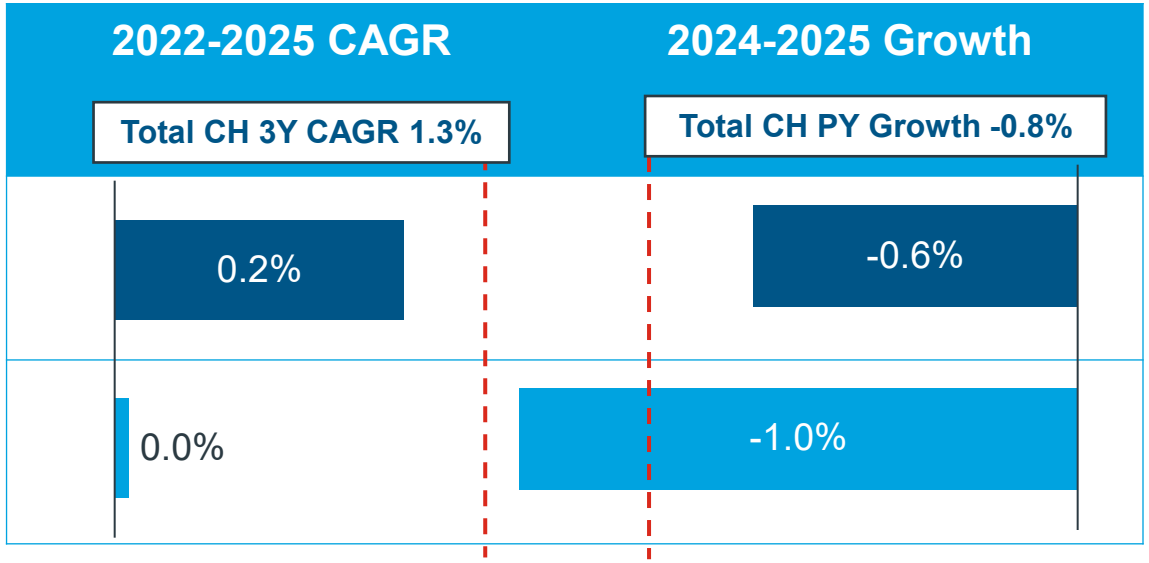
Austria CH Market Volume & Growth

Medical devices represent 29% of the CH market volume, experiencing a long-term growth at 0.2%

Market Volume (Mn Units), and Latest Volume Share (%)



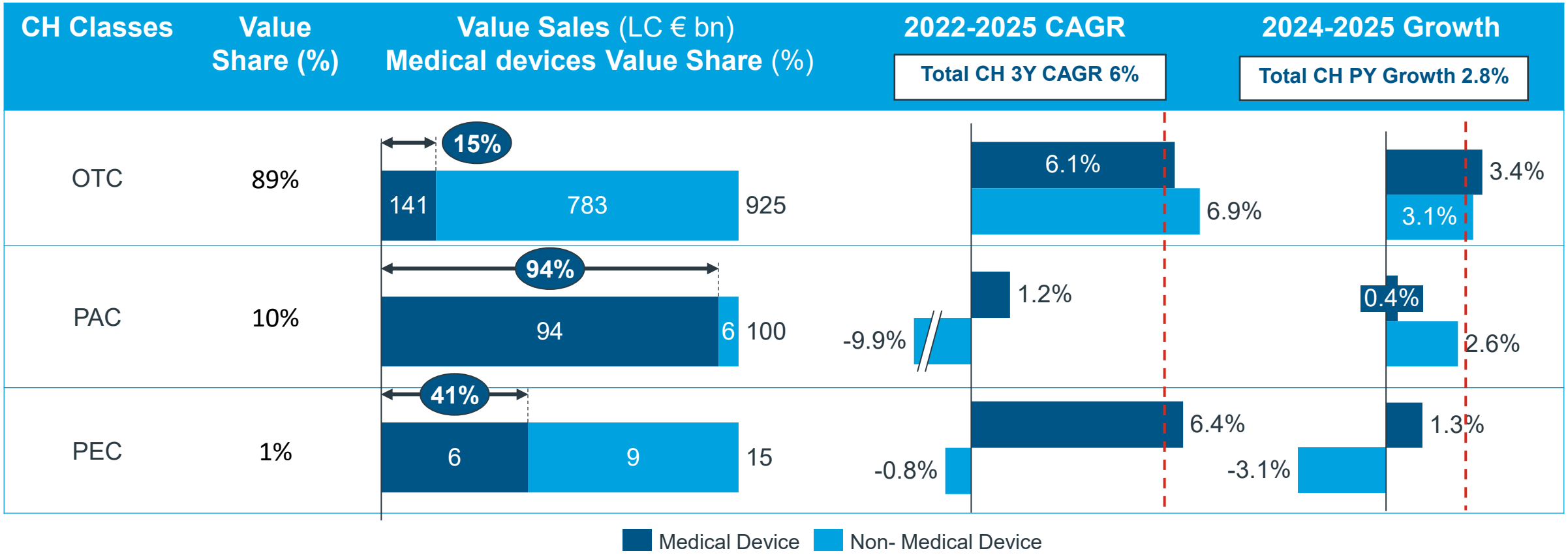
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Austria CH Performance by Classes

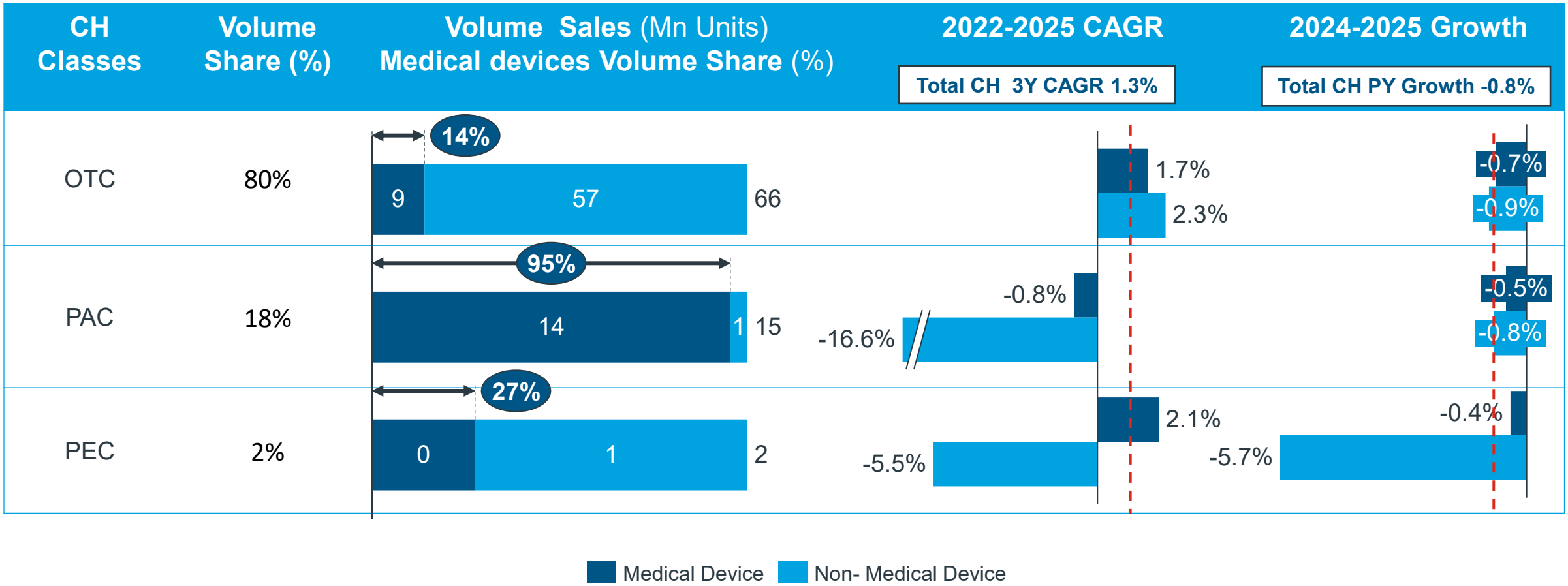
*OTC leads with **€141 Mn** in medical device sales and positive growth, while patient care contributes the highest share of medical device value at 94%*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Austria CH Performance by Classes

Patient Care dominates medical device sales with 14 Mn units (95% market share), while OTC leads in overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Austria Medical Devices Packs & New Launches

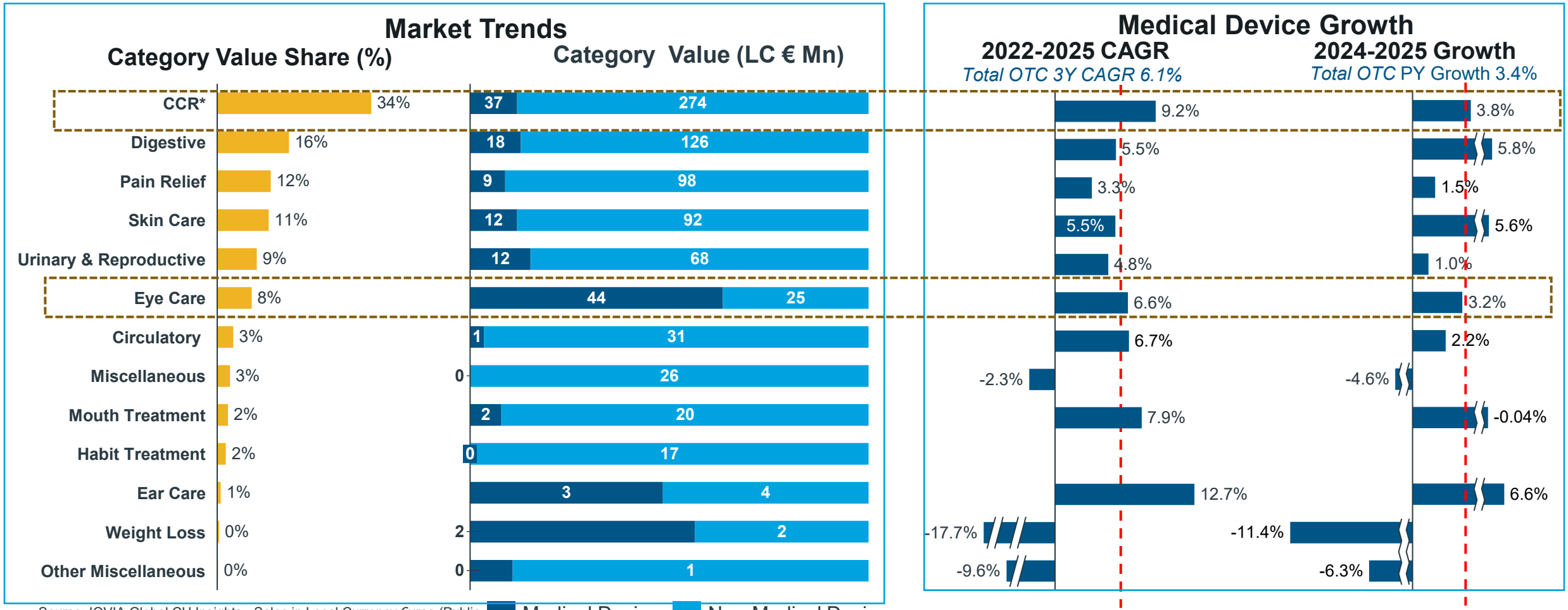
Most new medical device launches over the past three years have been in the Patient Care category

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	7,785	9,381	**17,166**	1,806	6,894	**8,700**
OTC	817	6,881	**7,698**	175	5,061	**5,236**
Patient Care	6,890	1,360	**8,250**	1,613	912	**2,525**
Personal Care	78	1,140	**1,218**	18	921	**939**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Austria OTC Performance by CHC 1 Category in 2025

Eye care tops the medical devices sector, whereas CCR dominates in total market volume

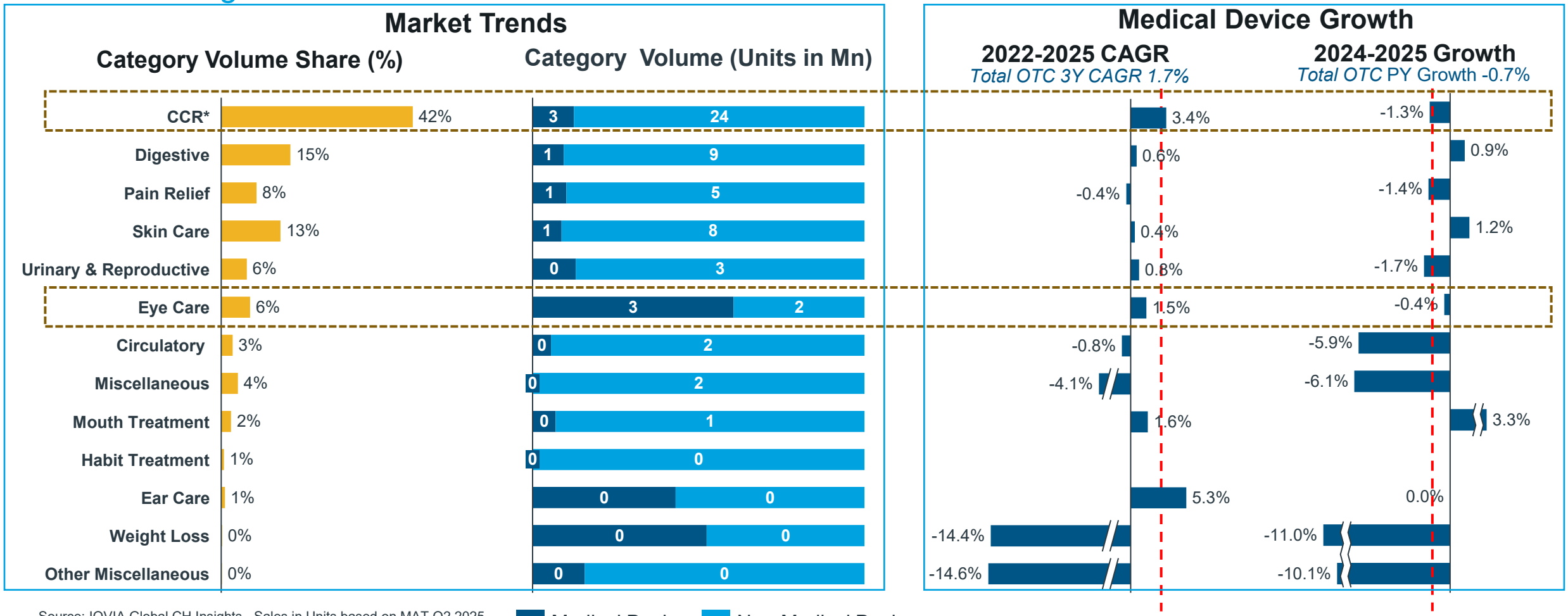


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Austria OTC Performance by CHC 1 Category in 2025

CCR holds the largest portion of CH volume, with the volume share of eye care within medical devices being similar to that of CCR



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Austria Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~ 95% of values; led by Eye care

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**141.4**	
Eye Care	31%	44,0	Not available
CCR	26%	36.7	Sore Throat 17.7; Nasal Saline 11.8; Cough 3.7; Other Respiratory 2.1
Digestive	13%	18.4	Laxatives 9.8; Digestive Acid & Heartburn 6.8; Antidiarrhoeals 1.3; 0.5
Skin care	9%	12.3	Wound Healing 5.4; Hand Skin Wound Disinfect 2.0; Wart/Corn Removal 2.0; Scar & Keloid 1.7
Urinary & Reproductive	9%	12.1	Urinary Condition 6.4; Gynaecological 5.5; Urology 0.2; Male Condition
Pain Relief	7%	9.5	Muscular Pain 8.8; Mouth Pain 0.6; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Austria Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	2%	3.4	Not available
Weight Loss	1%	2.1	Not available
Mouth Treatment	1%	1.7	Other Mouth Treatment 1.5; Mouth Infection 0.0; Fluoride Products 0.2
Circulatory	1%	1.1	Antihemorrhoids 0.9; Chloesterol Regulating 0.0; Other Circulatory 0.2
Other Miscellaneous	0%	0.2	Not available
Miscellaneous	0%	0.	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Austria Medical Devices Performance by top CHC 2 Segments

Sore throat under CCR leads in volume sales as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**9.1**	
Eye Care	28%	2.5	Not available
CCR	38%	3.4	Sore Throat 2.0; Nasal Saline 1.1; Cough 0.2; Other Respiratory 0.1
Digestive	10%	0.9	Laxatives 0.5; Digestive Acid & Heartburn 0.3; Antidiarrhoeals 0.1; 0.0
Skin Care	8%	0.7	Wound Healing 0.4; Hand Skin Wound Disinfect 0.1; Wart/Corn Removal 0.1; Scar & Keloid 0.1
Urinary & Reproductive	5%	0.5	Gynaecological 0.3; Urinary Condition 0.2; Urology 0.1; Male Condition 0.0
Pain Relief	6%	0.5	Muscular Pain 0.5; Mouth Pain 0.0; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Austria Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear care	2%	0.2	Not available
Weight Loss	1%	0.1	Not available
Mouth Treatment	1%	0.1	Other Mouth Treatment 0.1; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

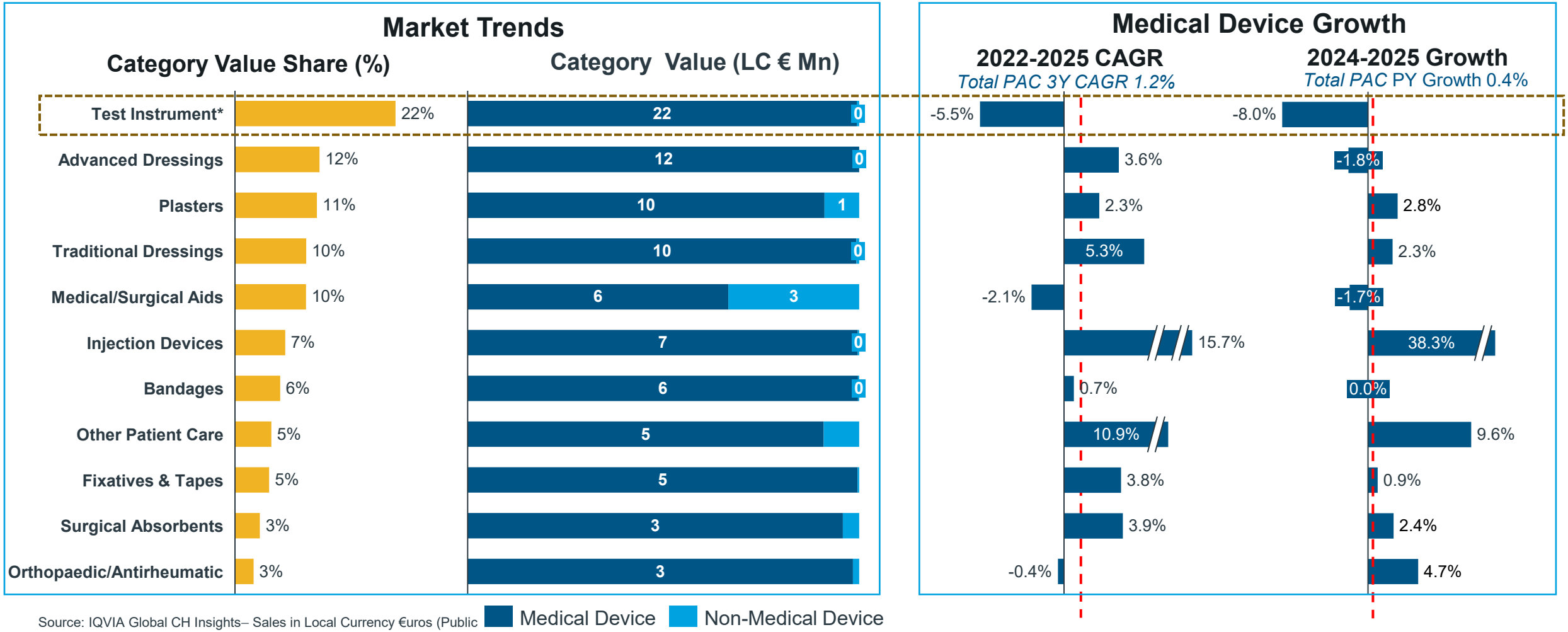
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Austria PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments leads medical devices values with **€22 Mn** sales*

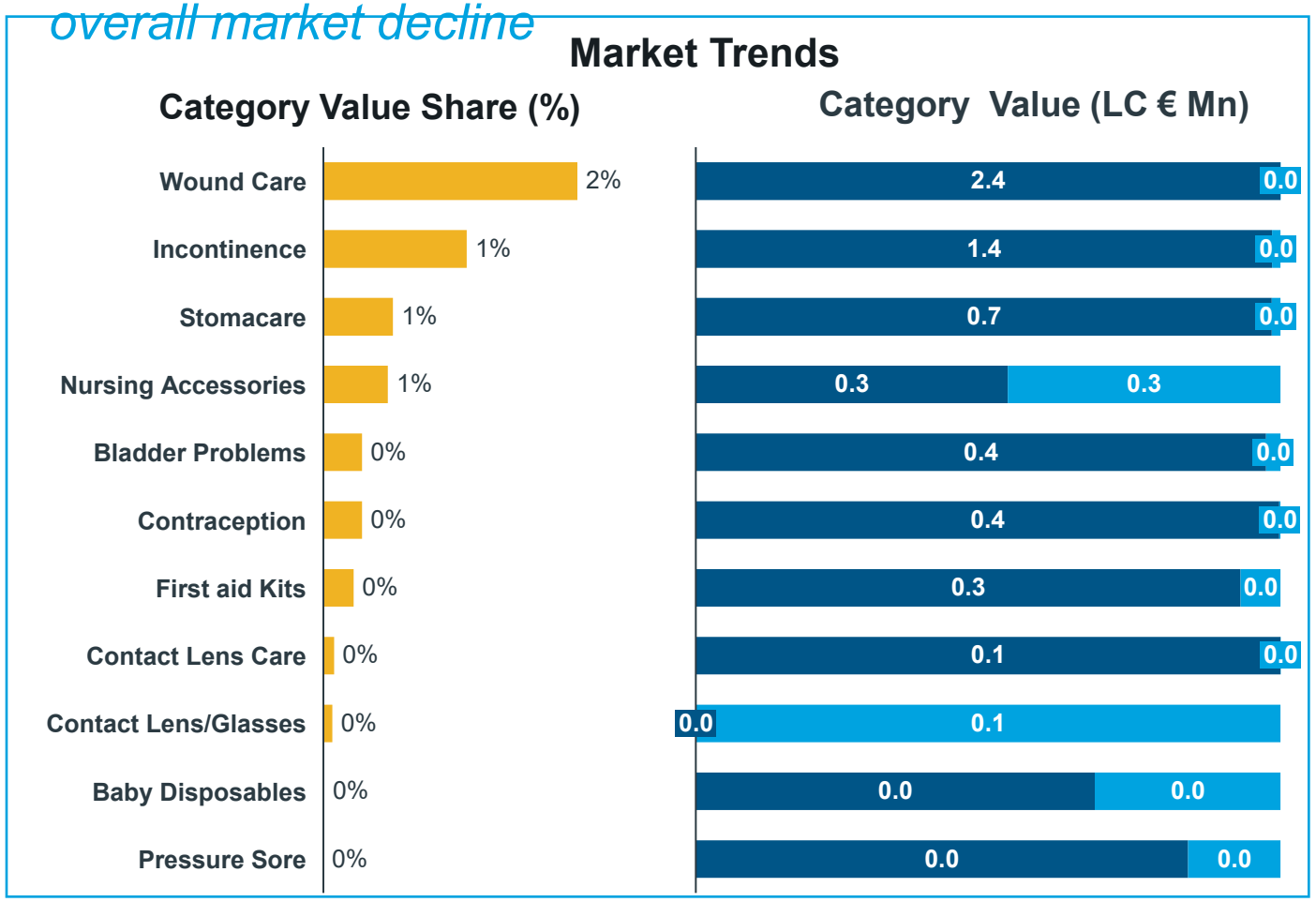


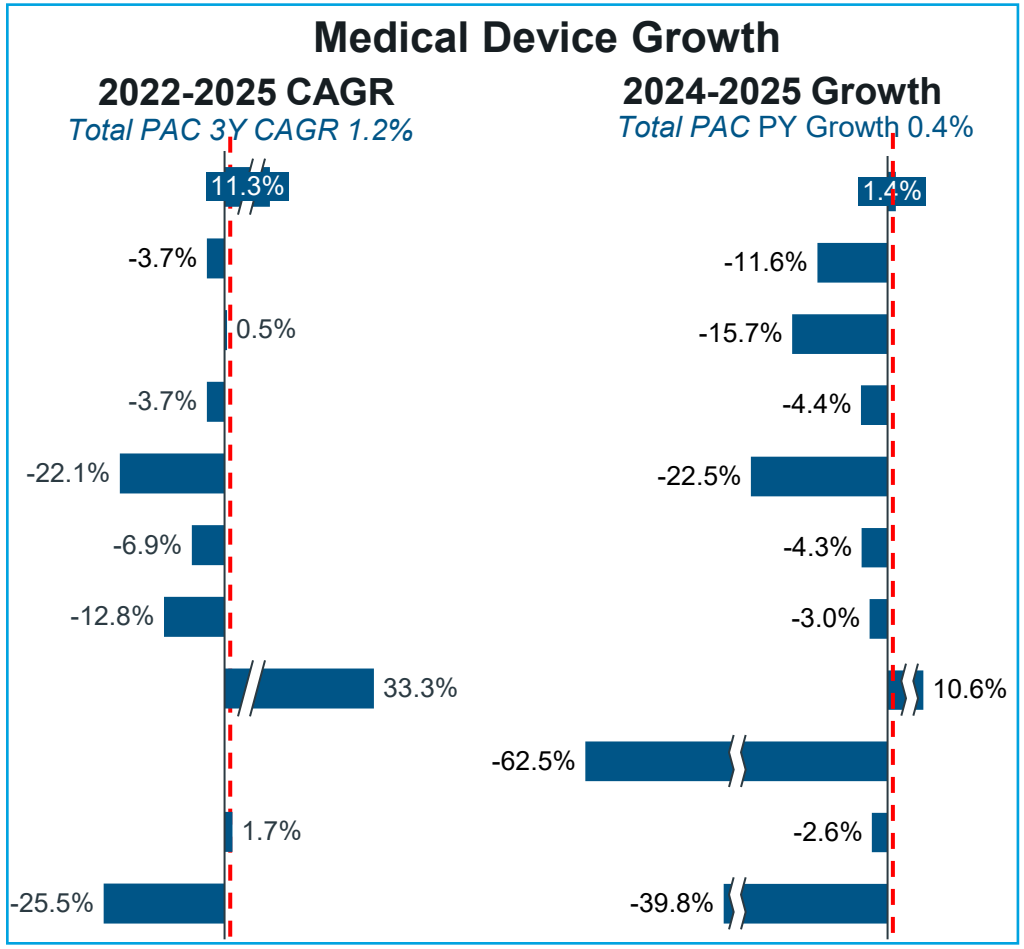
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Austria PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like Wound care and Contact lens/Glasses show positive S-T and L-T trend despite overall market decline



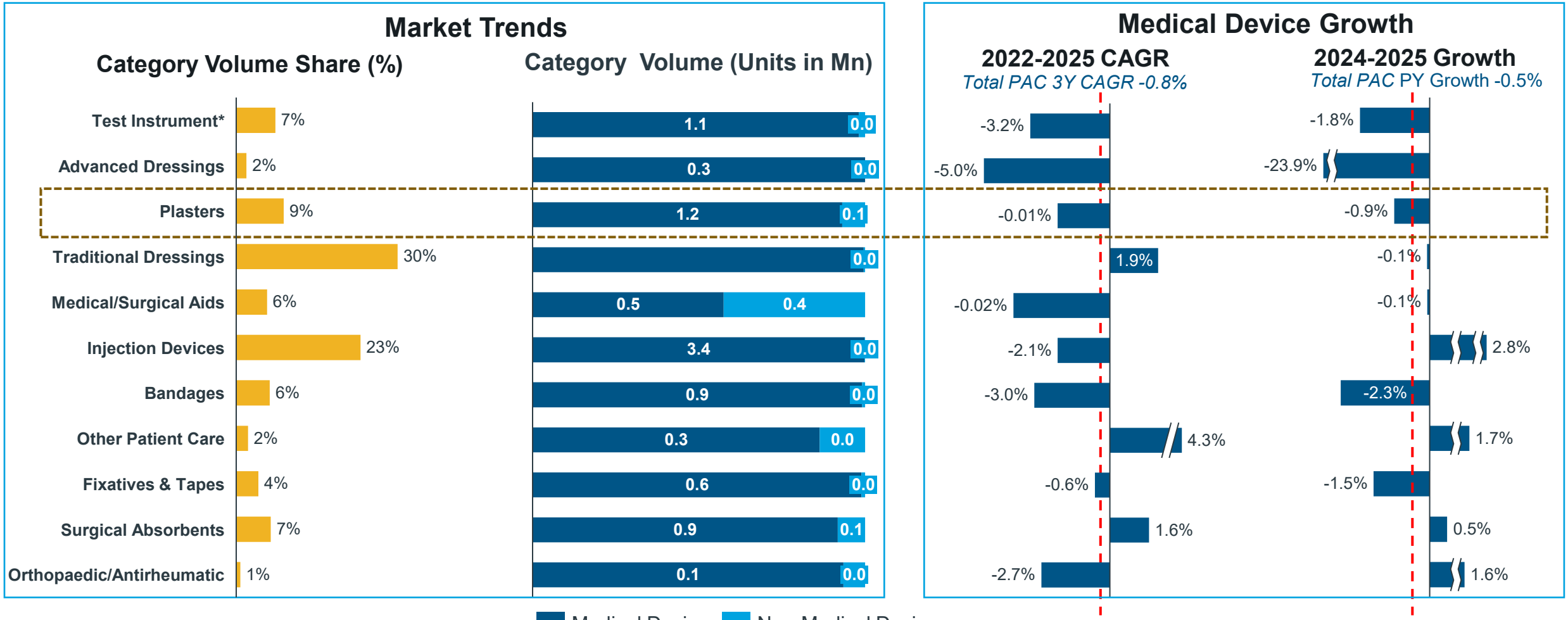


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Austria PAC Performance by CHC 1 Category (1/2)

Plasters hold the highest volume share within medical devices segment



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

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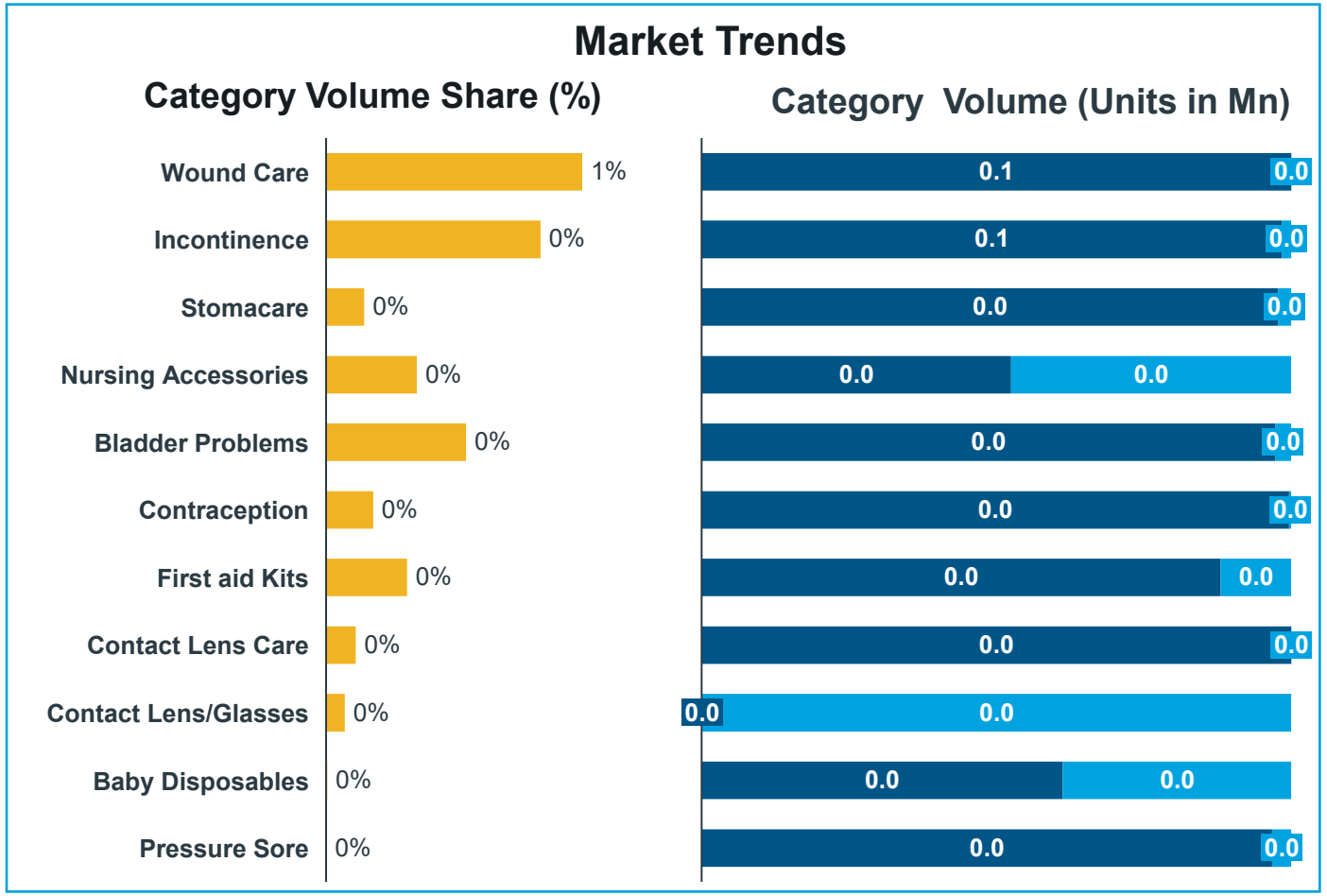
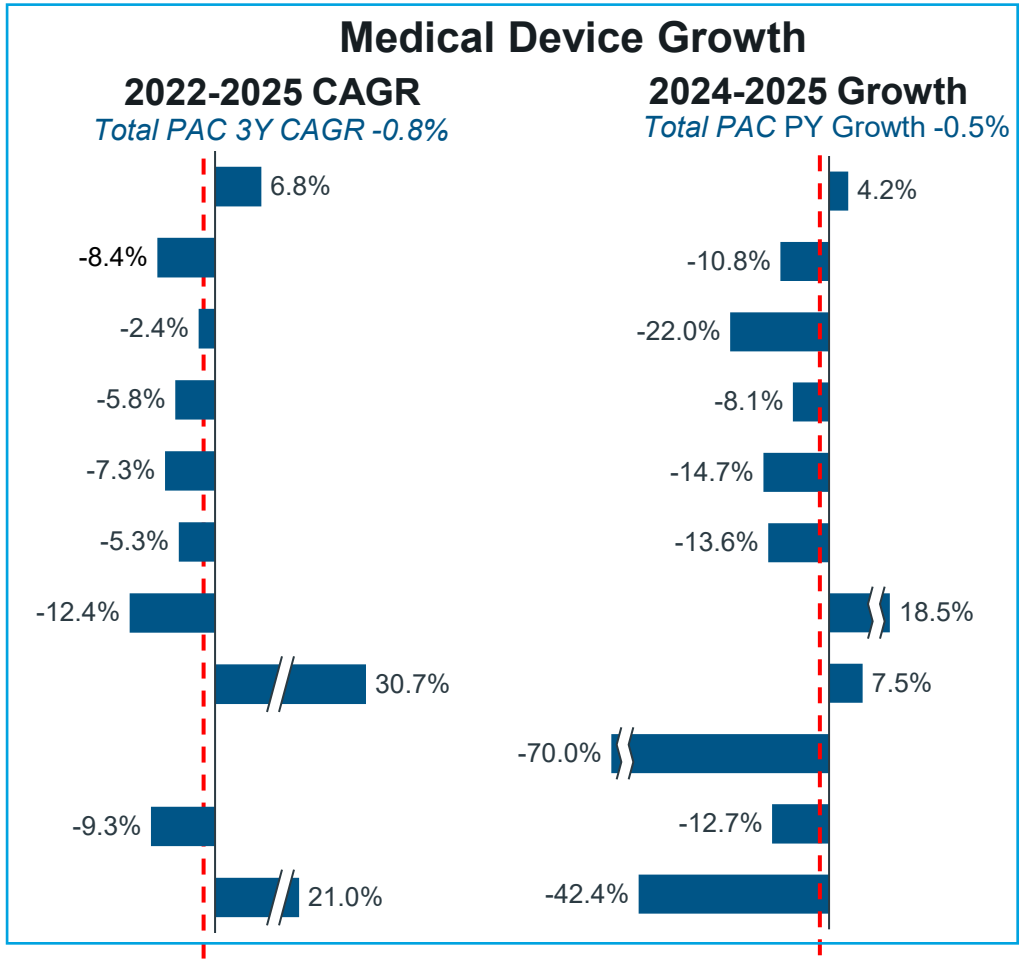
Austria PAC Performance by CHC 1 Category (2/2)

Categories like Wound Care and contact lens show a positive growth trend





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Austria Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 70% of values; dominated by Base Tech advanced dressings

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**94.0**	
Test Instrument	23%	21.9	Gluc Measuring 6.0; Blood Press Monitors 5.3; Thermometers 3.4; Pregnancy Test 2.3
Advanced Dressings	12%	11.6	Base Tech 8.1; Anti-Infection 3.3; Hyaluron 0.1; Collagen 0.1
Plasters	11%	10.3	Plaster Strip 5.2; Special Plaster 3.1; Plaster Spec. Uses 1.4; Liquid Plaster 0.5
Traditional Dressings	10%	9.7	Not available
Injection Devices	7%	6.9	Disposable Injection 4.6; Injection Acces. 2.3; Reusable Devices 0.0
Medical/ Surgical Aids	7%	6.5	Inhalation & Aerosol 4.1; Gloves 0.9; Hot & Cold Packs 0.9; Miscellaneous 0.3

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Austria Medical Devices Performance by top CHC 2 Segments

Traditional dressings account for 32% of total medical devices volume shares

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**14.1**	
Test Instrument	8%	1.1	Thermometers 0.2; Coronavirus Test 0.2; Gluc Measuring 0.2; Pregnancy Test 0.1
Advanced Dressings	2%	0.3	Base Tech 0.2; Anti-Infection 0.1; Hyaluron 0.0; Collagen 0.0
Plasters	9%	1.2	Plaster Strip 0.8; Special Plaster 0.3; Plaster Spec. Uses 0.0; Liquid Plaster 0.0
Traditional Dressings	32%	4.5	Not available
Injection Devices	25%	3.4	Disposable Injection 2.3; Injection Acces. 1.2; Reusable Devices 0.0
Medical/ Surgical Aids	3%	0.5	Hot & Cold Packs 0.2; Inhalation & Aerosol 0.1; Gloves 0.1; Miscellaneous 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

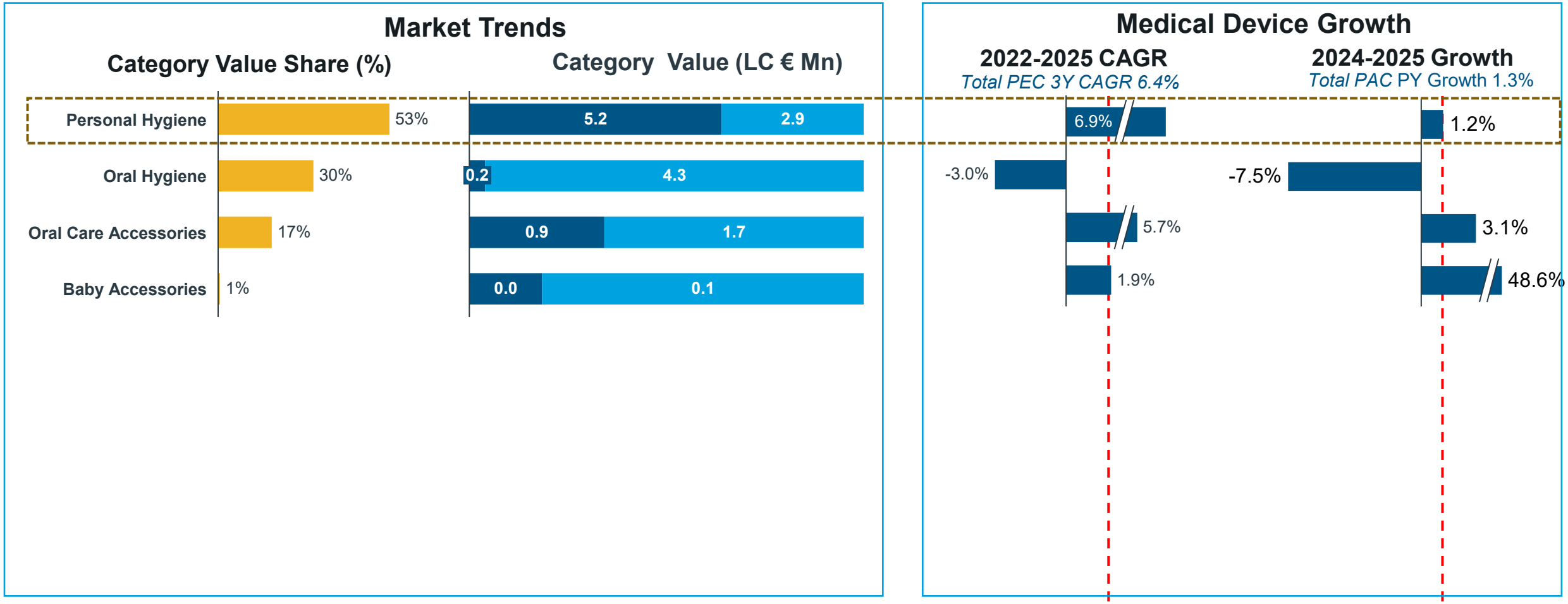
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Austria PEC Performance by CHC 1 Category

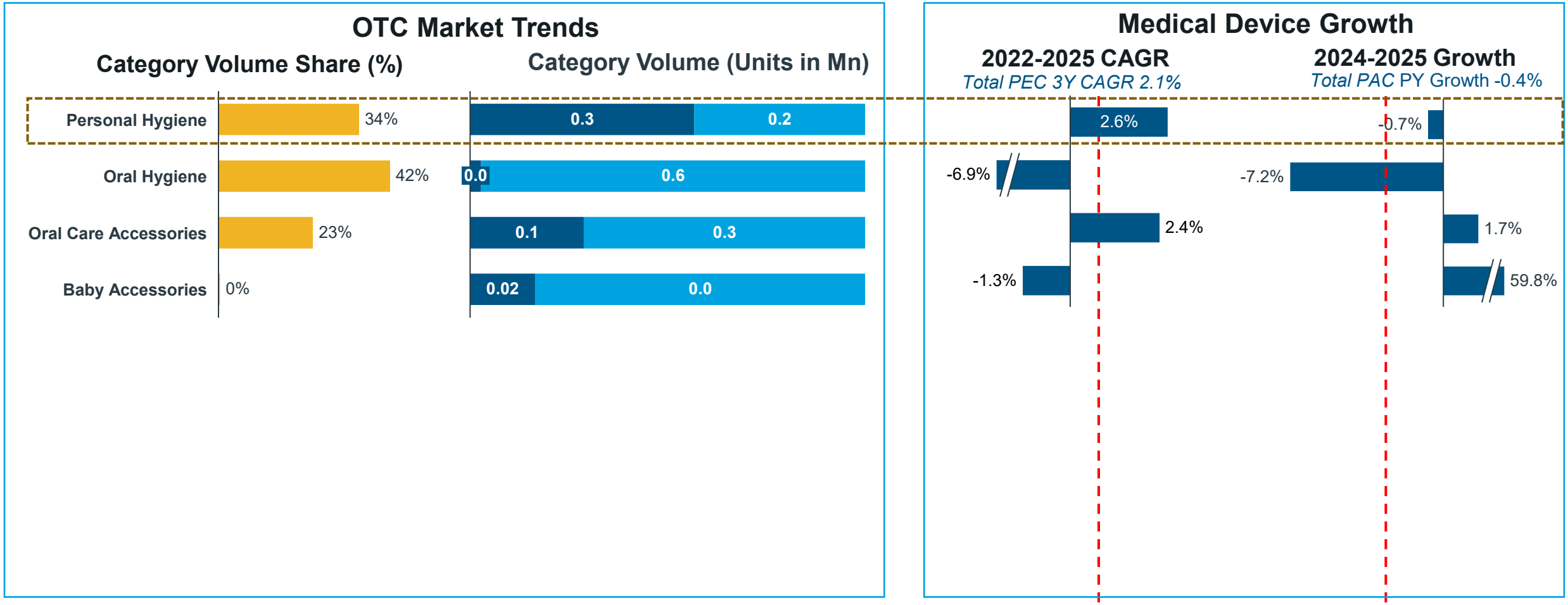
Personal Hygiene products lead medical devices values; showing positive growth in L-T & S-T



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Austria PEC Performance by CHC 1 Category

Personal Hygiene products continues to lead in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Austria Medical Devices Performance by top CHC 2 Segments

Intimate Hygiene under Personal Hygiene hold the largest value share

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**6.3**	
Personal Hygiene	83%	5.2	Intimate Hygiene 5.2; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	14%	0.9	Denture Products 0.8; Other Oral Care Acces. 0.1; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	3%	0.2	Toothpastes 0.1; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Austria Medical Devices Performance by top CHC 2 Segments

Intimate hygiene products under personal hygiene lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.4**	
Personal Hygiene	72%	0.3	Intimate Hygiene 0.3; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	24%	0.1	Denture Products 0.1; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	4%	0.0	Toothpastes 0.0; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Slovakia Medical Devices – Market Dynamics

Slovakia Medical Devices Performance Overview

Medical devices drive 36% of consumer healthcare value, fueled by steady growth across in L-T and S-T

36%

Medical device share of total CH value in 2025

Long –term Growth

5.4% by value

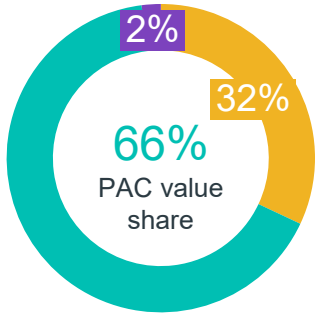
3.8% by volume

Short –term Growth

5.8% by value

3.1% by volume

Medical Devices – €231 Mn (2025)



Long-term Growth (Value)

3.1%	10.6%	7.6%
PAC	OTC	PEC

Medical Devices Categories

35%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **71%** of new pack launches

Medical Devices Innovation

Incontinence

38% *Share of total PAC values in 2025; Dominated by **Mod heav sev incont.***

Long-term Growth

9.9% by value

PAC (Patient care)

CCR

38% *Share for total OTC value in 2025 Dominated by **Nasal saline***

Long-term Growth

10.2% by value

OTC (Over-the-Counter)

Oral care accessories

83% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

6.8% by value

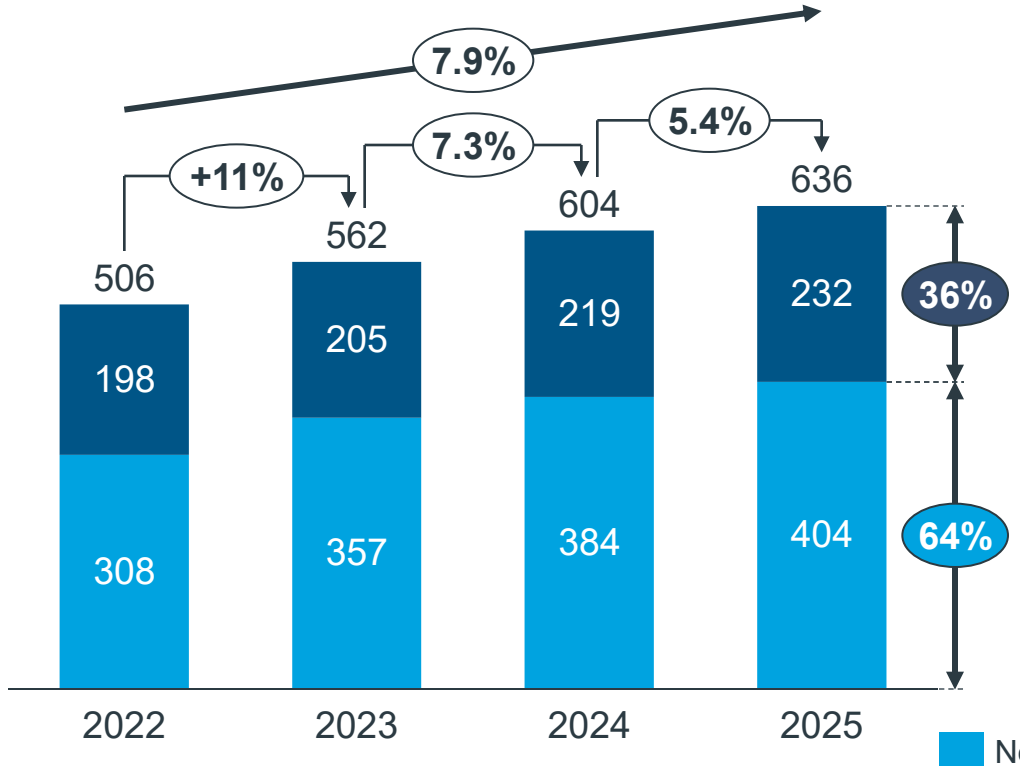
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

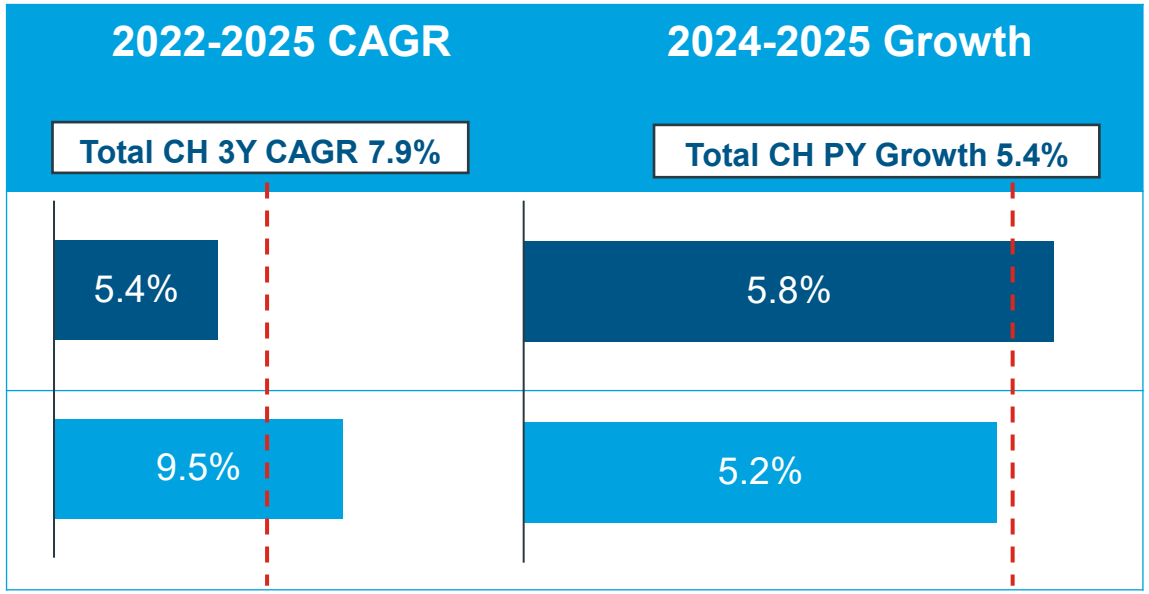
Slovakia CH Market Size & Growth

CH value market has shown impressive growth of 7.9% in the past 3 years with 36% share held by medical devices

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

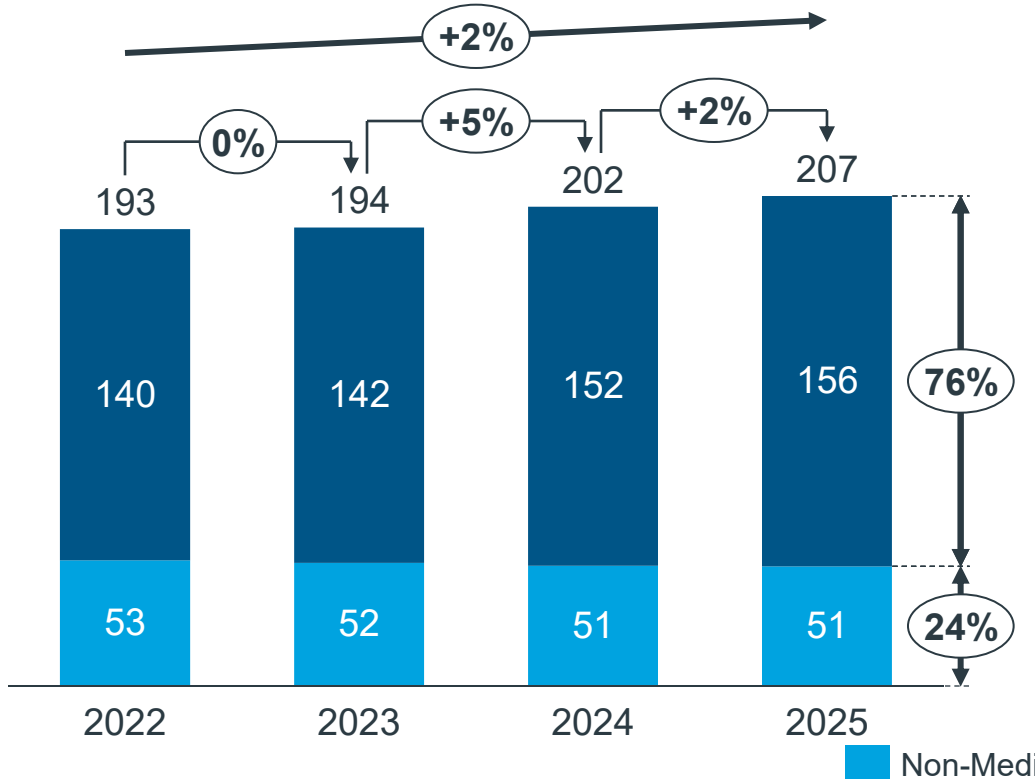


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

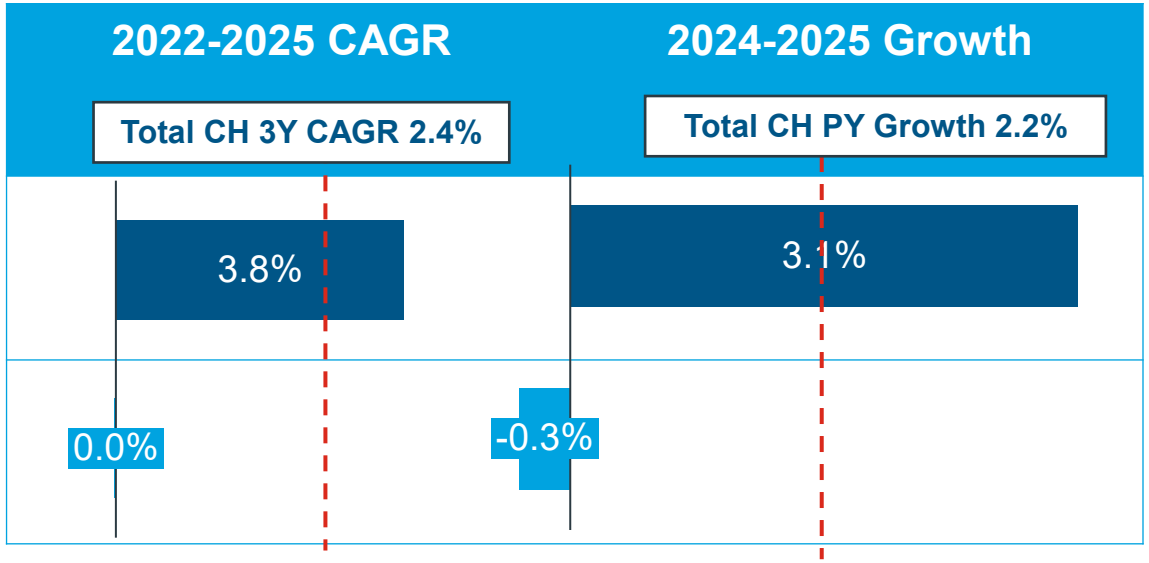
Slovakia CH Market Volume & Growth

Medical devices hold 76% of market volume in 2025 and show positive growth, with a 3.8% CAGR and 3.1% year-on-year growth

Market Volume (Mn Units), and Latest Volume Share (%)



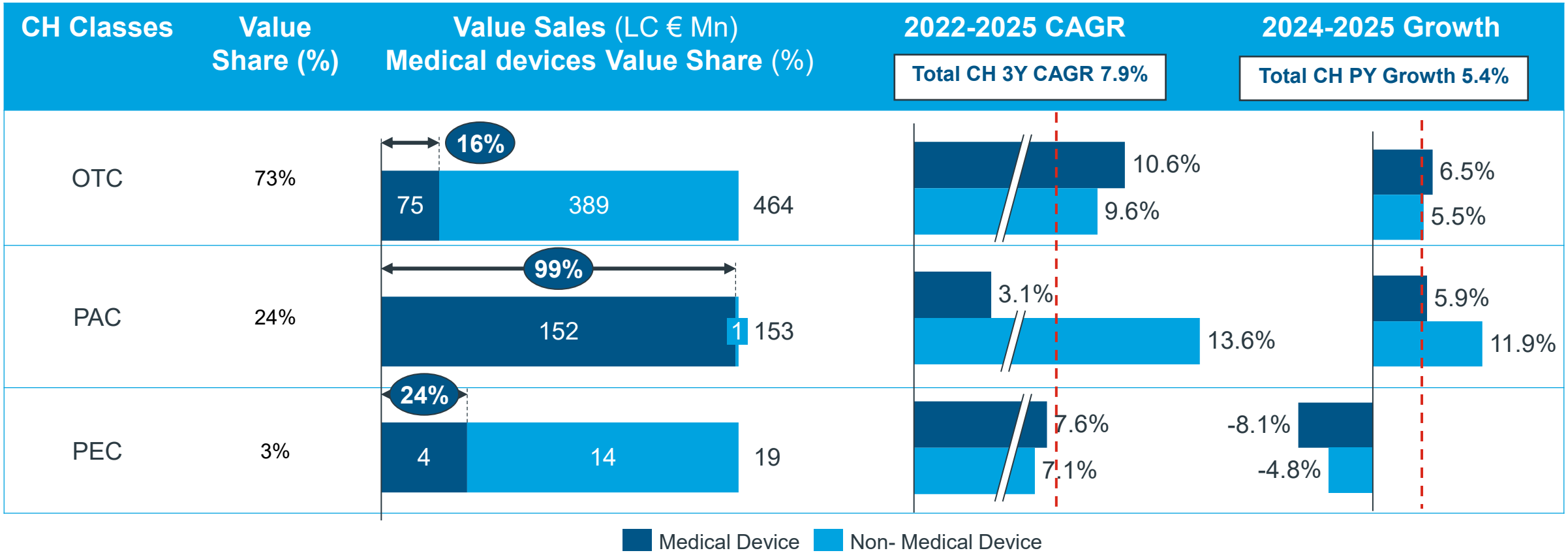
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Slovakia CH Performance by Classes

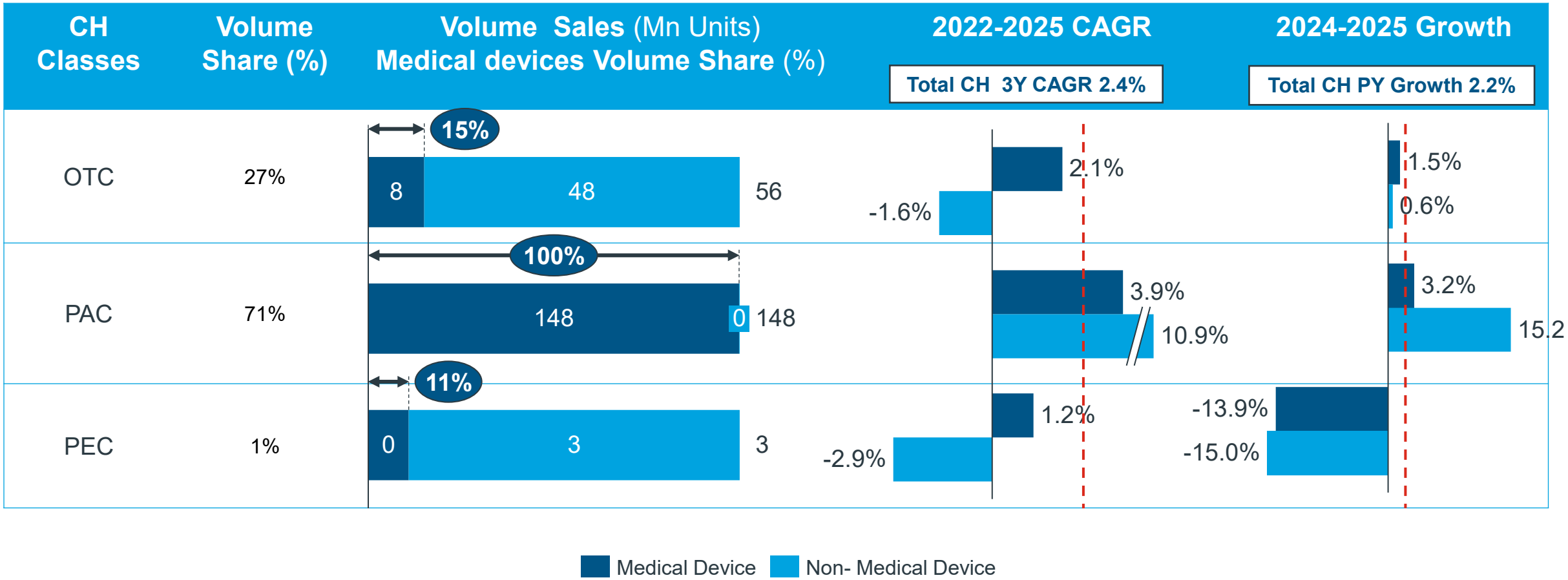
PAC products with a 99% medical device value share; record a growth of 3.1% CAGR from 2022 to 2025



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Slovakia CH Performance by Classes

Patient Care contributes the highest in volumes as well with 100% medical device value share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Slovakia Medical Devices Packs & New Launches

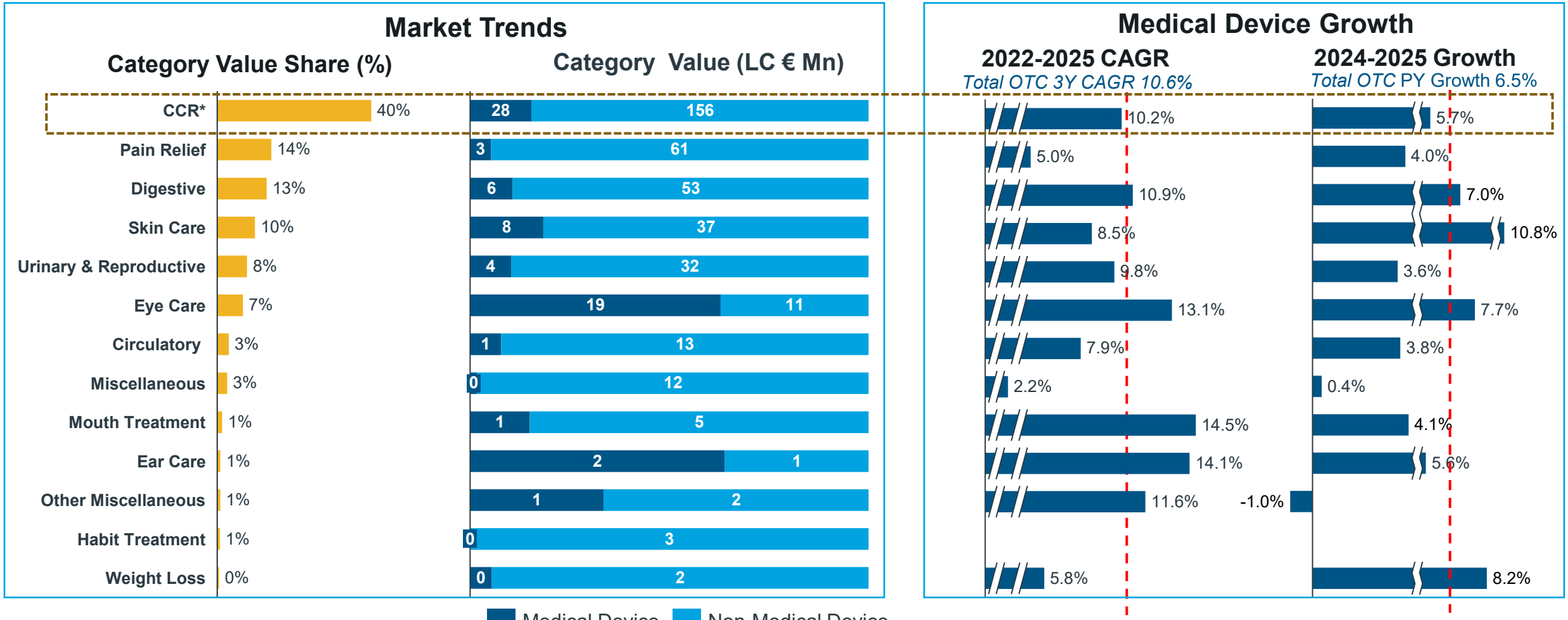
In the last three years, the PAC segment has accounted for the highest number of new pack launches

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	4,757	7,449	**12,206**	1,401	2,608	**4,009**
OTC	653	4,290	**4,943**	176	1,275	**1,451**
Patient Care	3,552	427	**3,979**	990	123	**1,113**
Personal Care	552	2,732	**3,284**	235	1,210	**1,445**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Slovakia OTC Performance by CHC 1 Category in 2025

CCR leads the OTC segment with €28 Mn in values and a 40% category value share

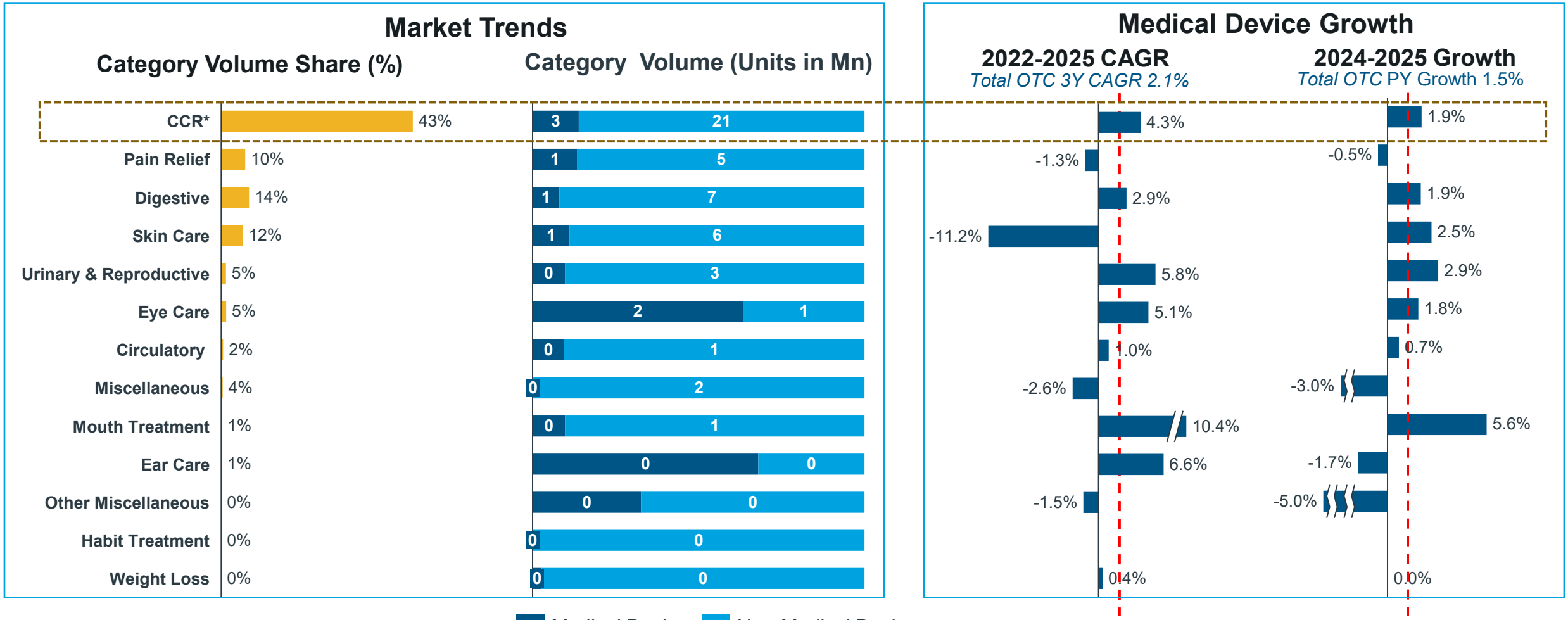


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Slovakia OTC Performance by CHC 1 Category in 2025

CCR leads in volume with 43% of volume share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Slovakia Medical Devices Performance by top CHC 2 Segments

Nasal saline from CCR category leads with € 8.8Mn in medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**75.3**	
CCR	38%	28.3	Nasal Saline 8.8; Sore Throat 7.9; Cough 6.5; Other Respiratory 3.4
Eye Care	26%	19.4	Not available
Skin Care	11%	8.3	Skin Protector/Emollients 3.2; Wound Healing 1.4; Wart/Corn Removal 1.2; Antifungals 0.9
Digestive	8%	6.3	Digestive 2.5; Laxatives 1.5; Acid & Heartburn 1.2; Antidiarrhoeals 1.0
Urinary & Reproductive	5%	3.7	Gynaecological 3.5; Urinary Condition 0.2; Urology 0.0; Male Condition 0.0
Pain Relief	4%	3.4	Muscular Pain 2.6; Mouth Pain 0.8; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovakia Medical Devices Performance by top CHC 2 Segments

Small categories contribute <10% to values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	2.4	Not available
Other Miscellaneous	2%	1.2	Not available
Circulatory	1%	1.1	Antihemorrhoids 1.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.9	Other Mouth Treatment 0.7; Mouth Infection 0.2; Fluoride Products 0.0
Miscellaneous	0%	0.2	Not available
Weight Loss	0%	0.1	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovakia Medical Devices Performance by top CHC 2 Segments

Nasal saline from CCR leads in volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**8.4**	
CCR	40%	3.4	Nasal Saline 1.0; Sore Throat 1.0; Cough 0.6; Other Respiratory 0.5
Eye Care	23%	1.9	Not available
Skin Care	9%	0.7	Skin Protector/Emollients 0.3; Wound Healing 0.1; Skin Irritation 0.1; Hand Skin Wound Disinfect 0.1
Digestive	8%	0.6	Digestive 0.3; Laxatives 0.2; Antidiarrhoeals 0.1; Acid & Heartburn 0.1
Urinary & Reproductive	3%	0.3	Gynaecological 0.3; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	9%	0.8	Muscular Pain 0.7; Mouth Pain 0.1; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Slovakia Medical Devices Performance by top CHC 2 Segments

Top 6 categories cover >90% of the volume share

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	5%	0.4	Not available
Other Miscellaneous	1%	0.1	Not available
Circulatory	2%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	1%	0.1	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

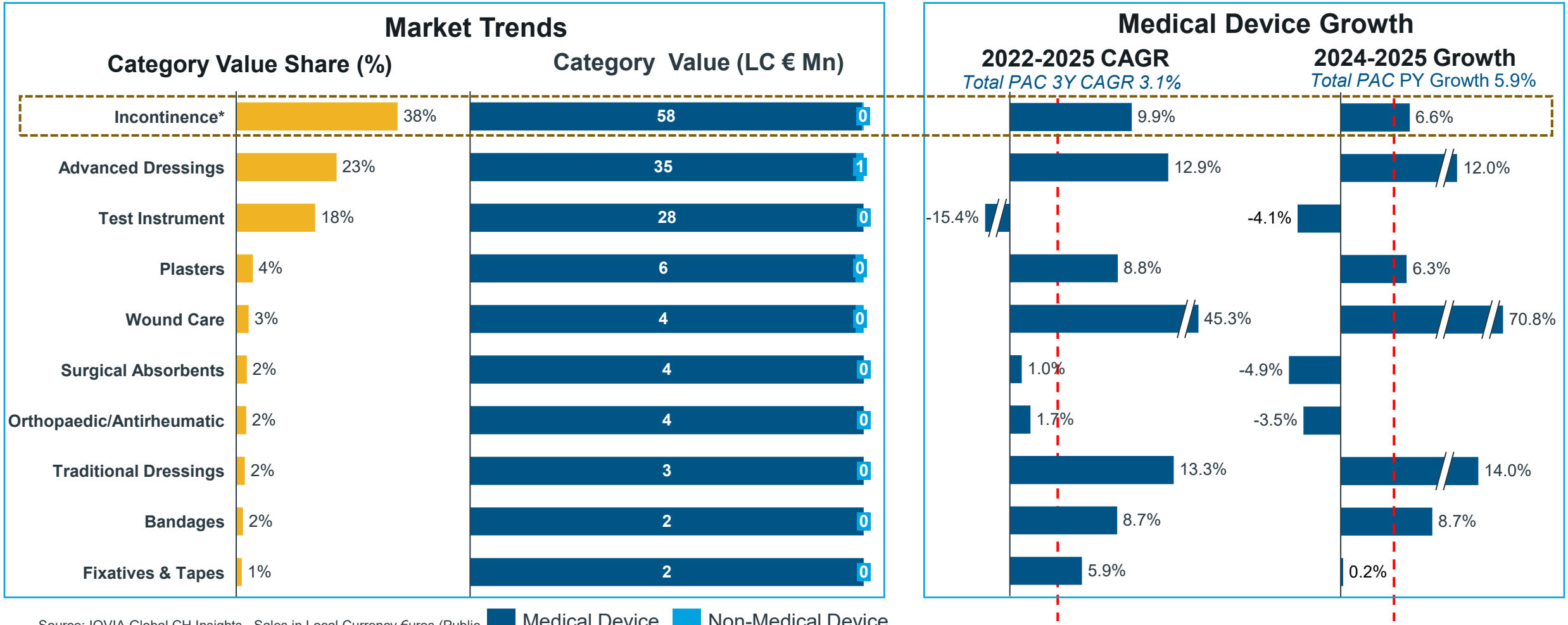
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Slovakia PAC Performance by CHC 1 Category in 2025 (1/2)

Incontinence products clearly dominate with 38% value share and € 58Mn medical device value sales

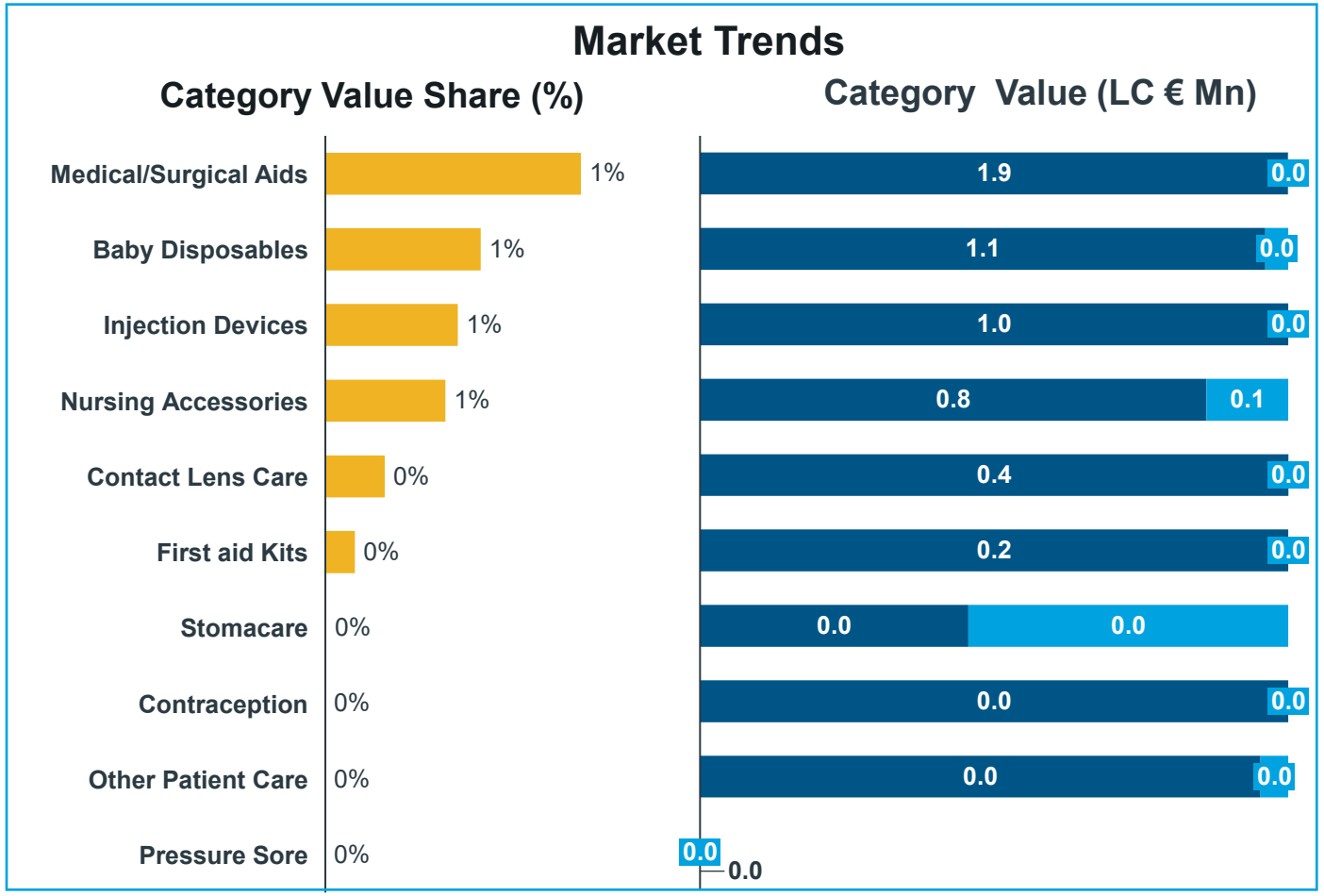


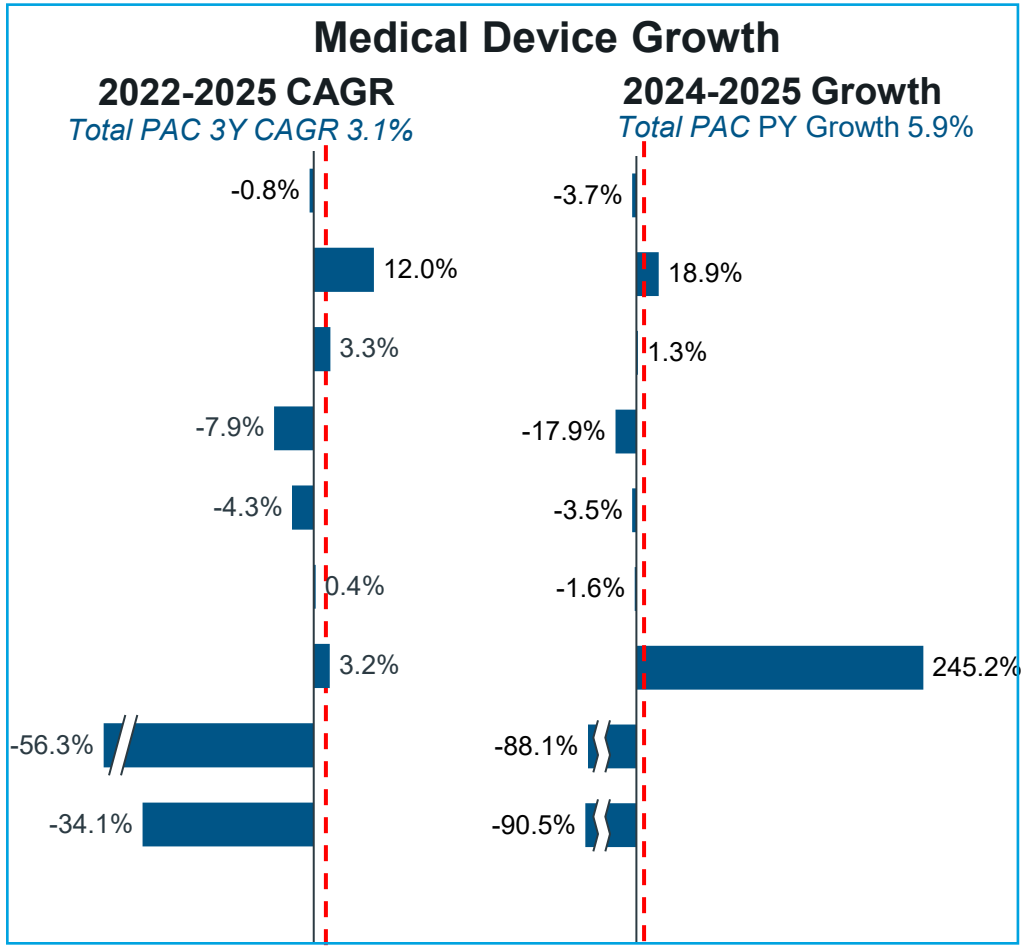
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Slovakia PAC Performance by CHC 1 Category in 2025 (2/2)

Growth has remained flat in the smaller categories



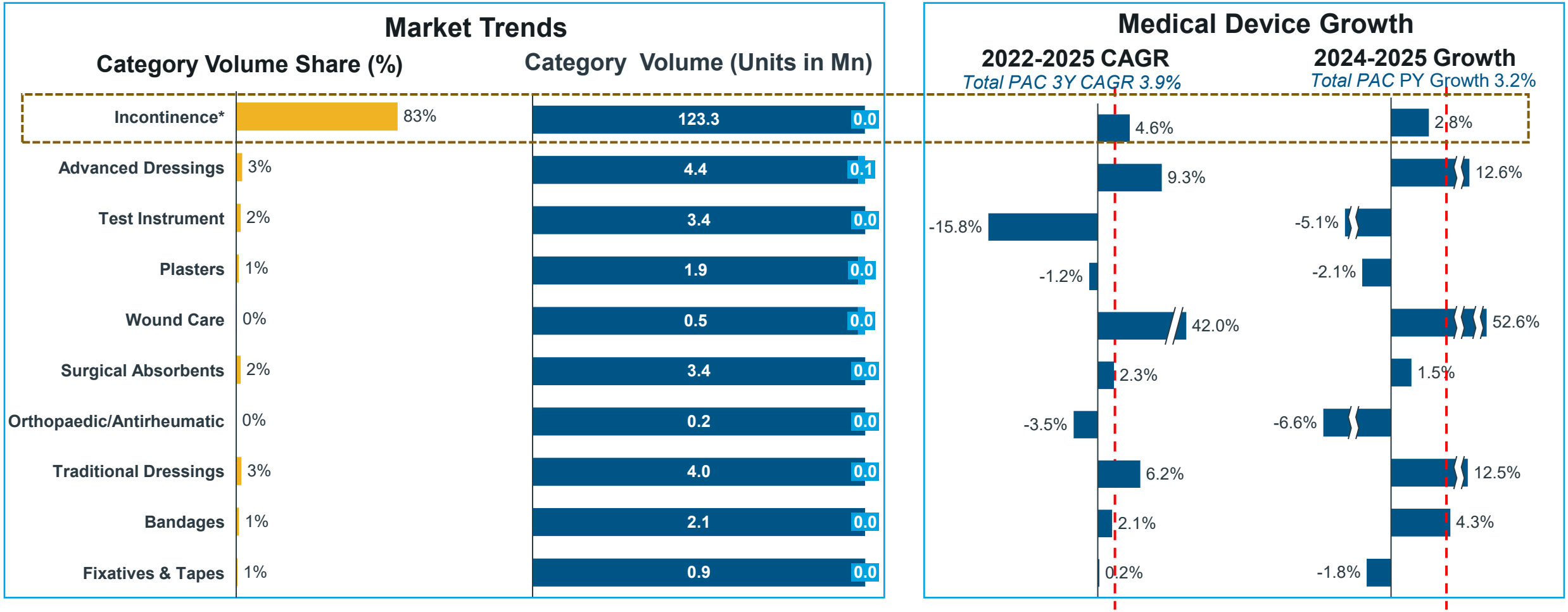


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Netherlands PAC Performance by CHC 1 Category (1/2)

Incontinence products are also leading in volumes

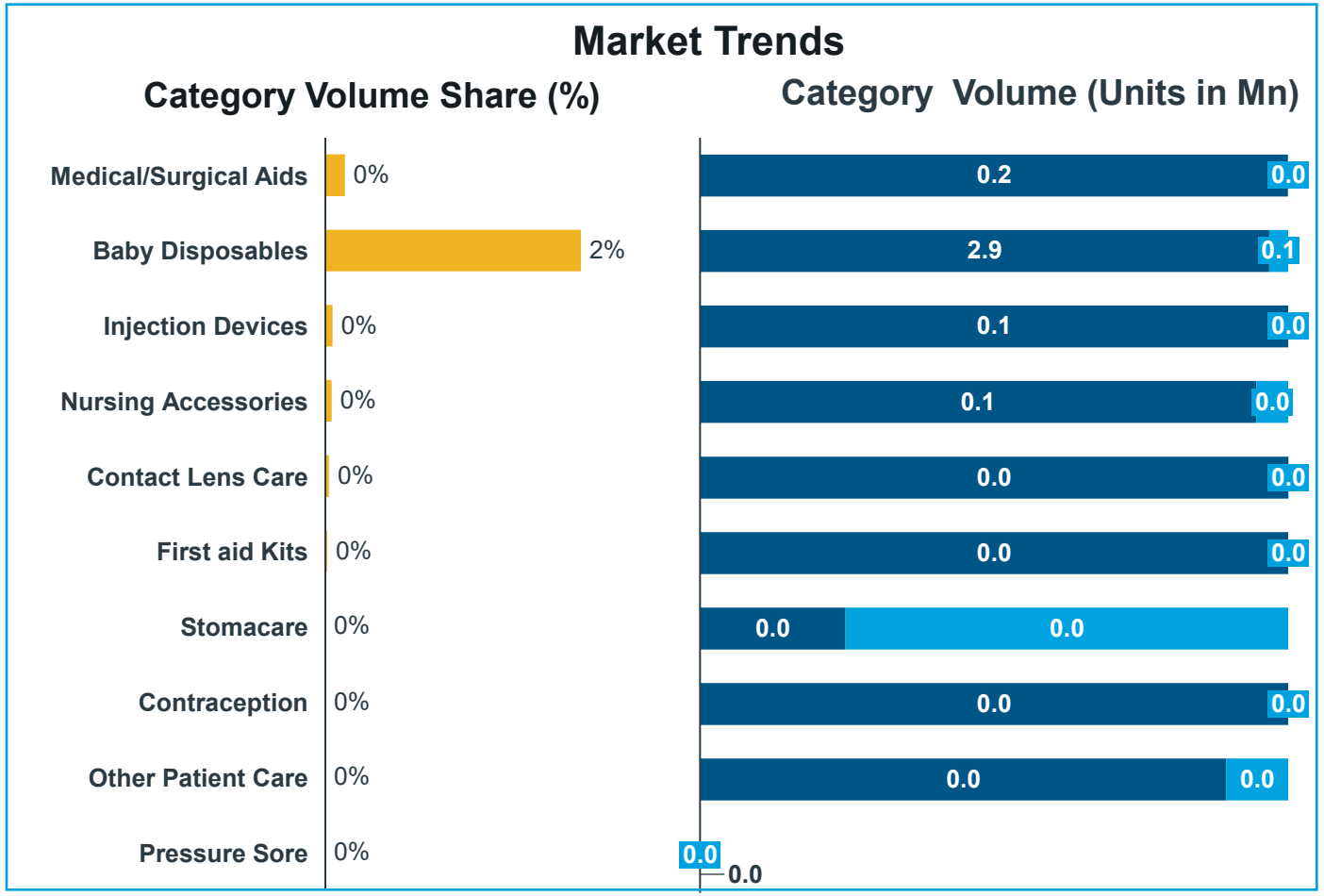


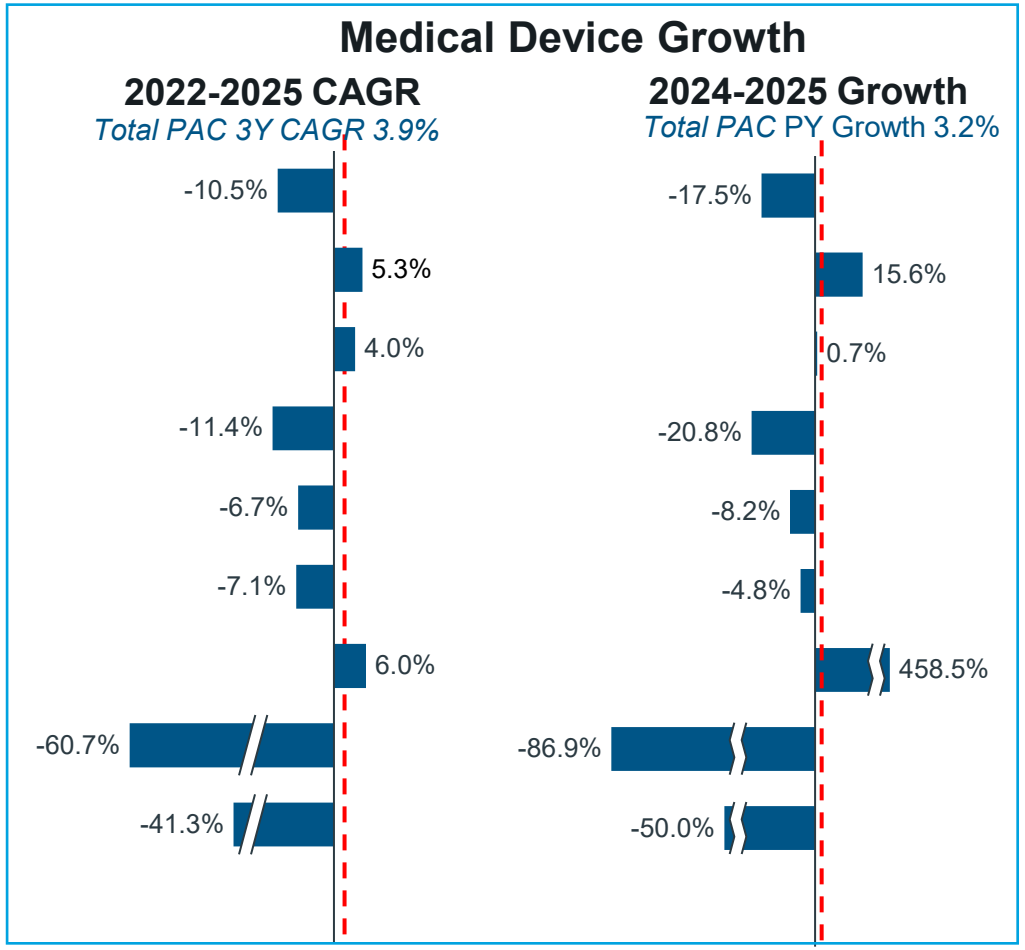
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Slovakia PAC Performance by CHC 1 Category (2/2)

PAC medical devices have experienced moderate growth over the last three years





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Slovakia Medical Devices Performance by top CHC 2 Segments

Mod Heav Sev Incont. is followed by base tech products in medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**152.0**	
Incontinence	38%	57.7	Mod Heav Sev Incont. 37.2; Light Incontinence 17.5; Bed Sheets/Pads 3.1; Incontinence care 0.0
Advanced Dressings	23%	35.3	Base Tech 25.0; Anti-Infection 9.2; Hyaluron 0.7; Collagen 0.5
Test Instrument	19%	28.3	Gluc Measuring 14.3; Blood Press Monitors 3.5; Coronavirus Test 3.4; Thermometers 2.4
Plasters	4%	5.9	Plaster Strip 3.0; Special Plaster 2.2; Liquid Plaster 0.4; Plaster Spec. Uses 0.2
Wound Care	3%	4.4	Not available
Surgical Absorbents	3%	3.8	Packs & Patches 2.6; Swabs & Pads 1.1; Cotton wool 0.1

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Slovakia Medical Devices Performance by top CHC 2 Segments

Light incontinence products dominate in terms of volume

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**147.6**	
Incontinence	84%	123.3	Light Incontinence 69.3; Mod Heav Sev Incont. 47.6; Bed Sheets/Pads 6.4; Incontinence care 0.0
Advanced Dressings	3%	4.4	Base Tech 3.0; Anti-Infection 1.3; Hyaluron 0.1; Collagen 0.0
Test Instrument	2%	3.4	Gluc Measuring 1.3; Coronavirus Test 1.1; Pregnancy Test 0.5; Thermometers 0.2
Plasters	1%	1.9	Plaster Strip 1.3; Plaster Spec. Uses 0.3; Special Plaster 0.3; Liquid Plaster 0.0
Wound Care	0%	0.5	Not available
Surgical Absorbents	2%	3.4	Packs & Patches 3.1; Swabs & Pads 0.3; Cotton wool 0.1

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

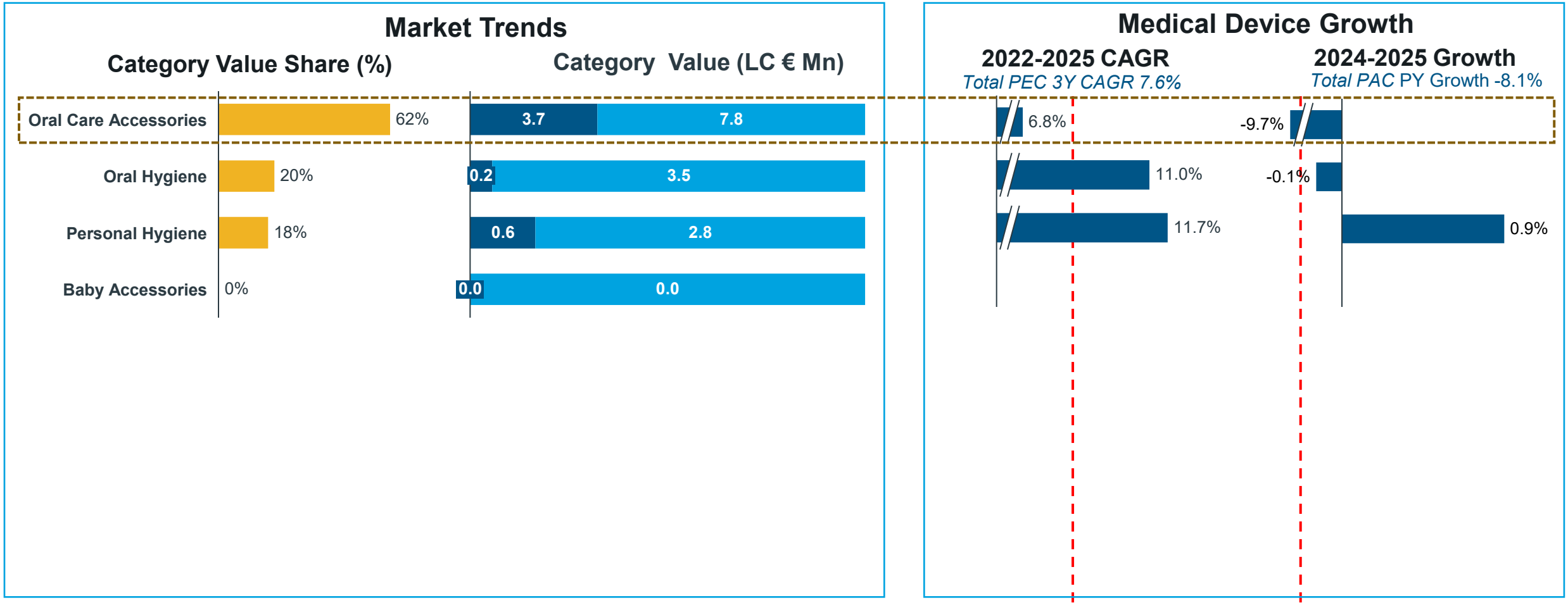
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Slovakia PEC Performance by CHC 1 Category

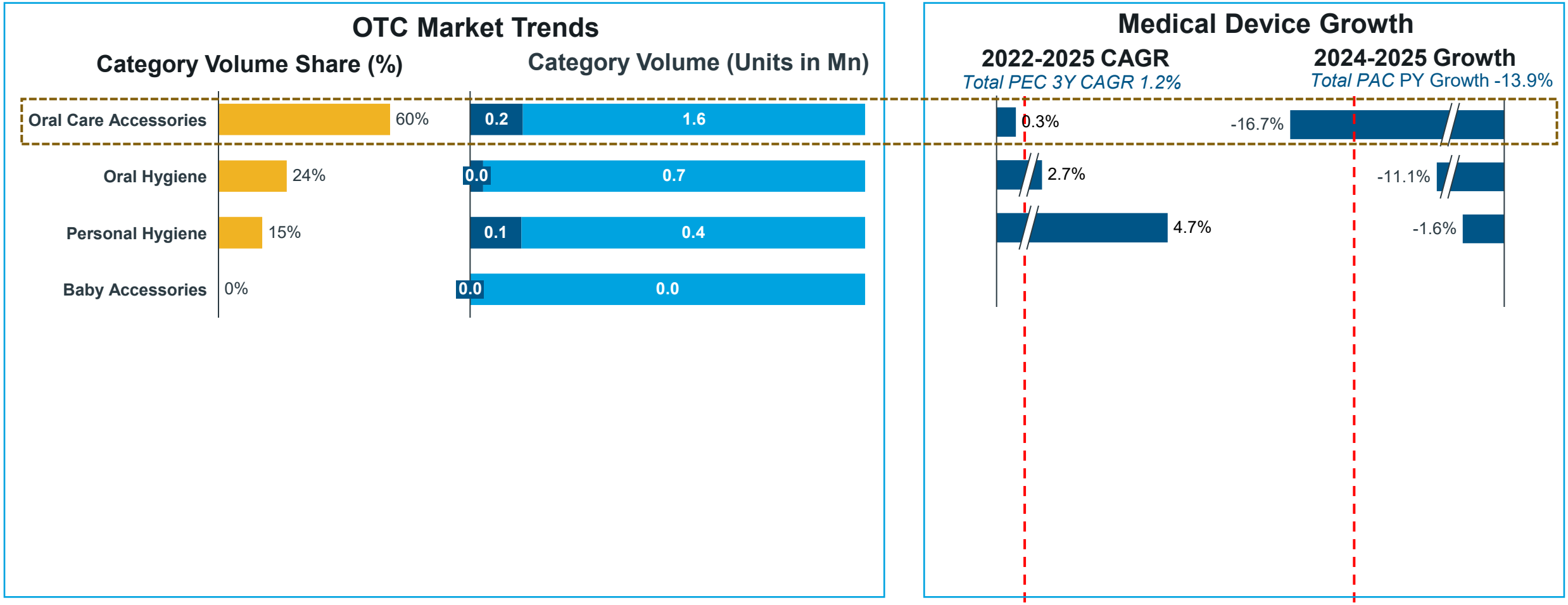
Oral care accessories dominate the medical device category value



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Slovakia PEC Performance by CHC 1 Category

Oral care accessories continue to lead in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Slovakia Medical Devices Performance by top CHC 2 Segments

Denture products take the lead in medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**4.5**	
Oral Care Accessories	83%	3.7	Denture Products 2.4; Toothbrushes 0.8; Interdental Brushes 0.5; Other Oral Care Acces. 0.0
Personal Hygiene	12%	0.6	Intimate Hygiene 0.6; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	5%	0.2	Toothpastes 0.1; Mouthwashes 0.1; Other Oral Care 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovakia Medical Devices Performance by top CHC 2 Segments

Denture products lead in volume as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.3**	
Oral Care Accessories	74%	0.2	Denture Products 0.1; Toothbrushes 0.1; Interdental Brushes 0.1; Other Oral Care Acces. 0.0
Personal Hygiene	18%	0.1	Intimate Hygiene 0.1; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	7%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

IQVIA CONSUMER HEALTH

Hungary Medical Devices – Market Dynamics

Hungary Medical Devices Performance Overview

Medical devices has grown in values both L-T and S-T with PAC showing the highest market penetration

25%

Medical device share of total CH value in 2025

Long –term Growth

1.7% by value

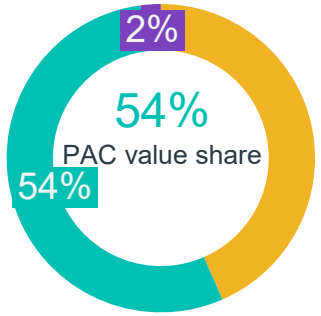
1.8% by volume

Short –term Growth

4.1% by value

9.3% by volume

Medical Devices – €192 Mn (2025)



Long-term Growth (Value)

-3.7% PAC

10.5% OTC

5.3% PEC

Medical Devices Categories

43%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **82%** of new pack launches

Medical Devices Innovation

Test Instruments

39% *Share of total PAC values in 2025; Dominated by **Gluc measuring***

Long-term Growth

-16.6% by value

PAC (Patient care)

Eye Care

30% *Share for total OTC value in 2025*

Long-term Growth

12.6% by value

OTC (Over-the-Counter)

Oral Care Accessories

63% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

4.5% by value

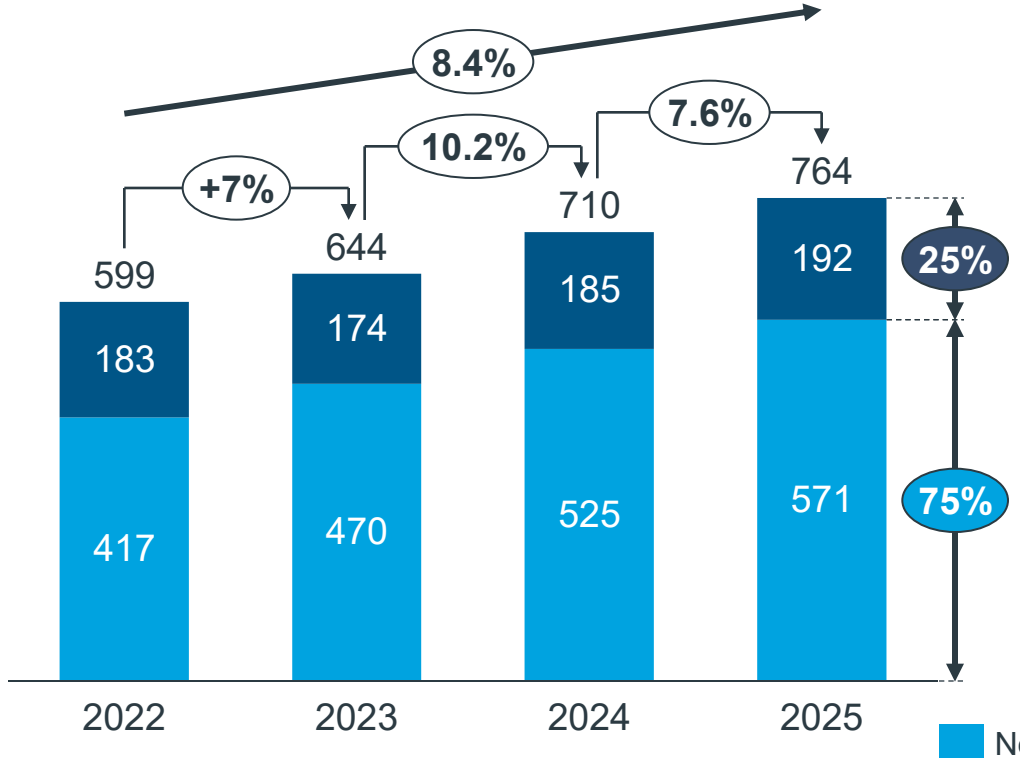
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

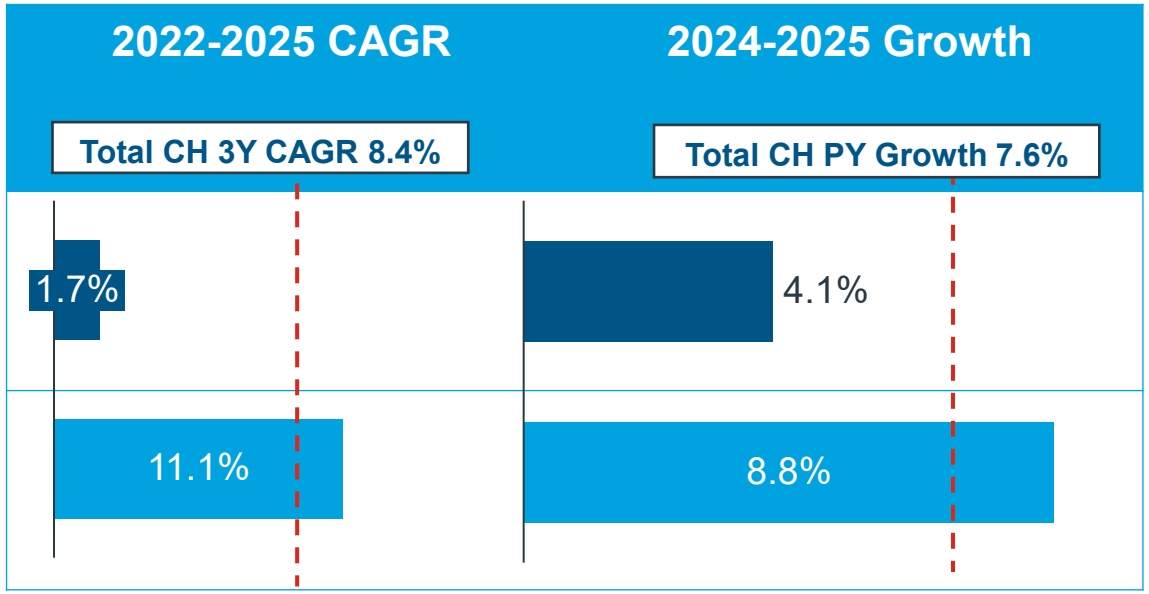
Hungary CH Market Size & Growth

The CH market has grown at 8.4% between 2022 and 2025, with the medical devices segment reaching a value of €192 Mn in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

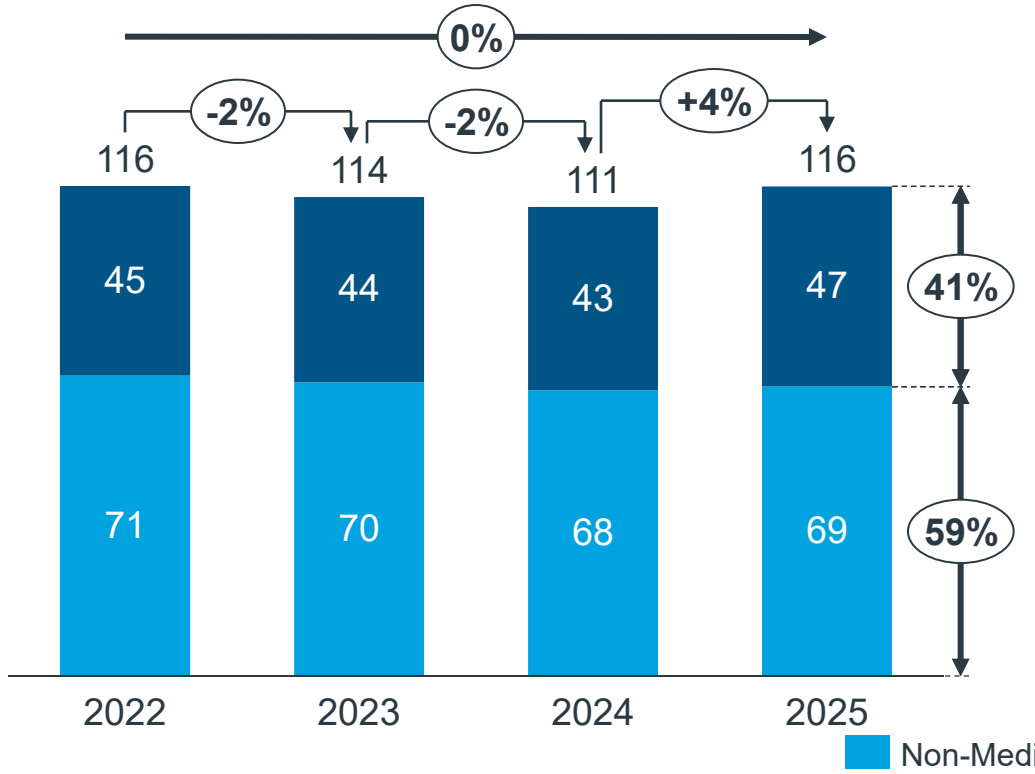


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

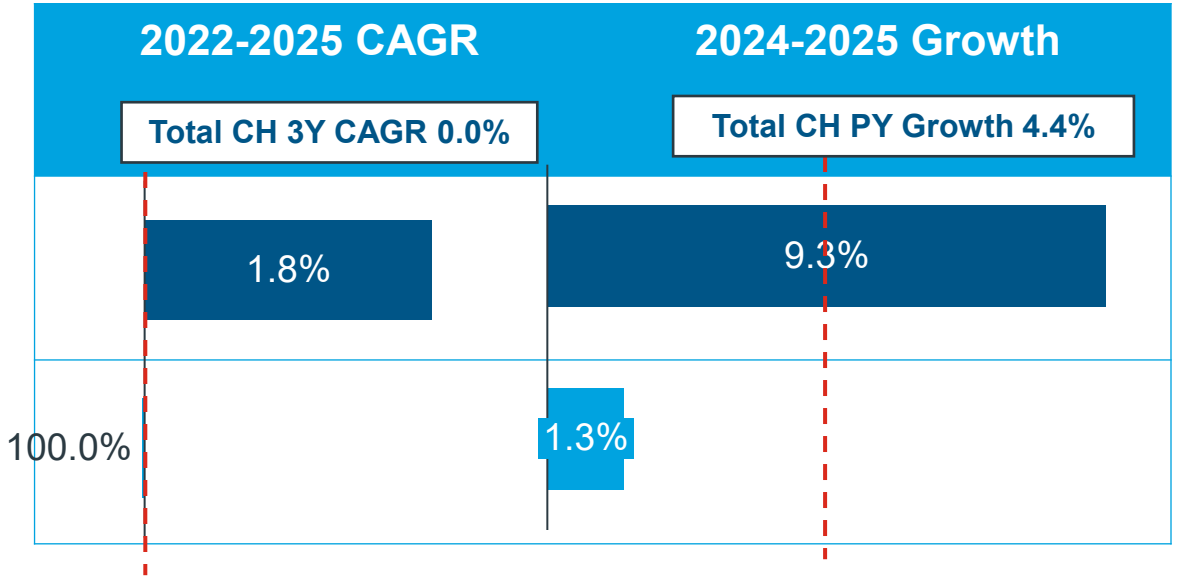
Hungary CH Market Volume & Growth

Medical devices account for 41% of the CH market volume, while the overall market has shown a flat trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



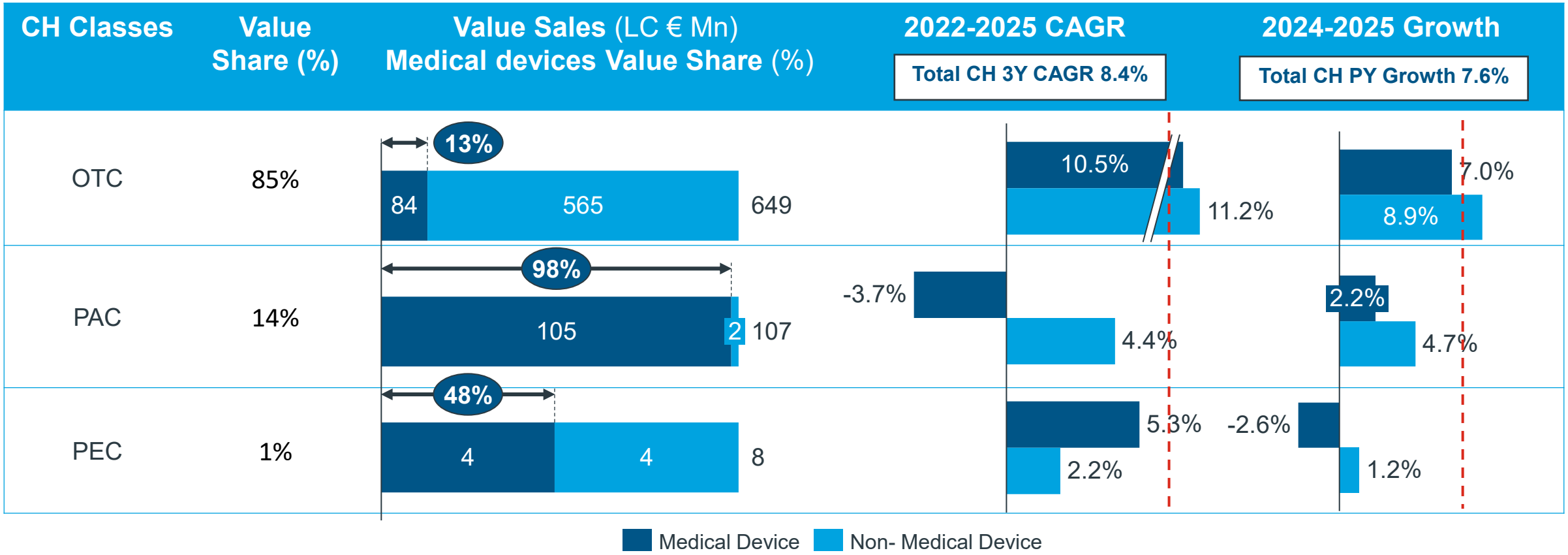
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Hungary CH Performance by Classes

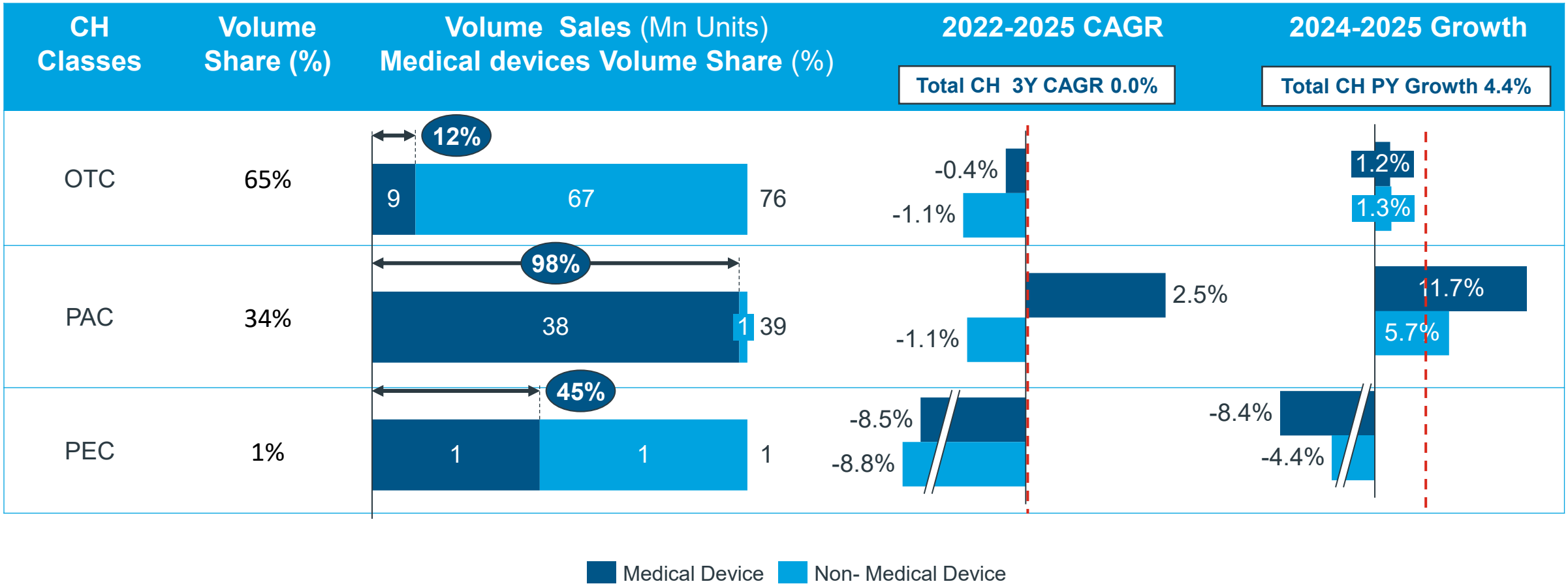
*PAC leads with **€105 Mn** in medical device sales and positive growth in the recent year*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Hungary CH Performance by Classes

Patient Care leads in medical device volume sales with 38 Mn units and holds the highest medical device volume share (98%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Hungary Medical Devices Packs & New Launches

The majority of the Medical devices new launches come from Patient Care category in last 3 years

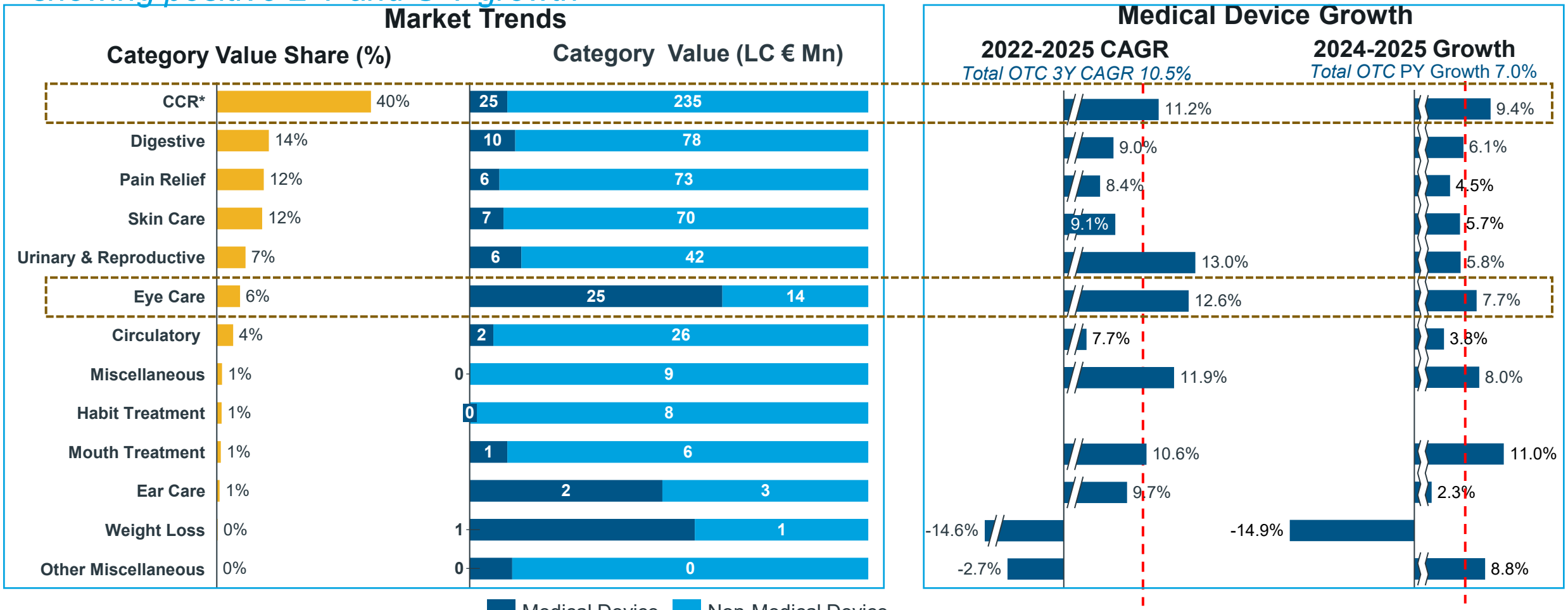
Category	Total Packs*			New Launches**		
CH Total	2,383	3,322	**5,705**	440	585	**1,025**
OTC	390	2,510	**2,900**	72	469	**541**
Patient Care	1,944	165	**2,109**	361	28	**389**
Personal Care	49	647	**696**	7	88	**95**

Medical Device | Non Medical Device | Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Hungary OTC Performance by CHC 1 Category in 2025

CCR and Eye care leads the medical devices values with 25 Mn in sales each, with overall market showing positive L-T and S-T growth

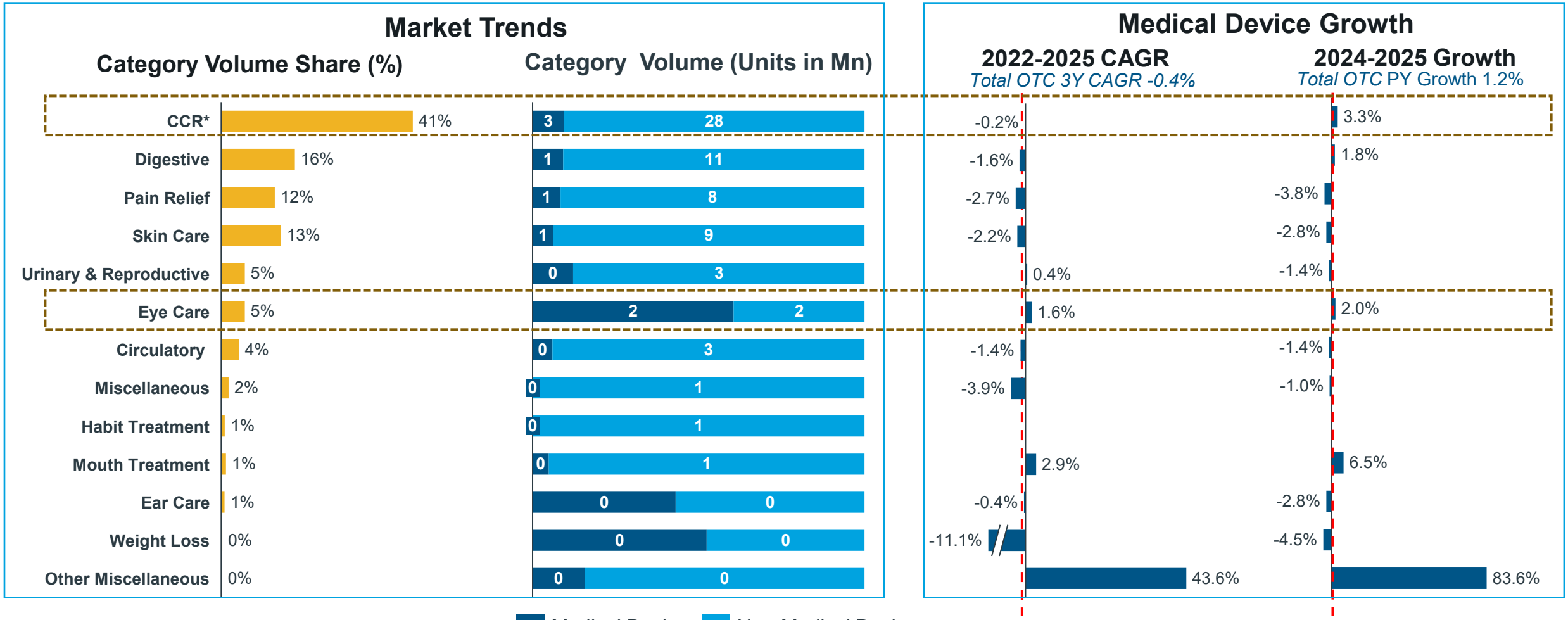


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Hungary OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share, followed by Eye care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Hungary Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Eye care and Nasal saline in CCR segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**83.6**	
Eye Care	30%	24.9	
CCR	29%	24.6	Sore Throat 13.2; Nasal Saline 7.1; Cough 2.3; Cold Remedies 1.6
Digestive	12%	10.1	Laxatives 5.0; Digestive 3.5; Acid & Heartburn 1.2; Antidiarrhoeals 0.4
Skin Care	8%	6.5	Hand Skin Wound Disinfect 2.1; Wound Healing 1.6; Wart/Corn Removal 1.2; Skin Protector/Emollients 0.6
Urinary & Reproductive	8%	6.3	Gynaecological 3.7; Urinary Condition 2.4; Urology Male Condition 0.2
Pain Relief	7%	5.9	Muscular Pain 5.4; Mouth Pain 0.4; Dysmenorrhea 0.1; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Hungary Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	2.3	Not available
Circulatory	2%	1.6	Antihemorrhoids 1.6; Chloesterol Regulating 0.0; Other Circulatory 0.1
Weight Loss	1%	0.8	Not available
Mouth Treatment	1%	0.6	Other Mouth Treatment 0.6; Mouth Infection 0.0; Fluoride Products 0.1
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Hungary Medical Devices Performance by top CHC 2 Segments

CCR leads in highest volume share of medical device sales, dominated by Sore Throat

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**8.7**	
Eye Care	27%	2.3	Not available
CCR	34%	2.9	Sore Throat 1.8; Nasal Saline 0.8; Cough 0.2; Cold Remedies 0.1
Digestive	13%	1.1	Laxatives 0.5; Digestive 0.4; Acid & Heartburn 0.1; Antidiarrhoeals 0.0
Skin Care	7%	0.6	Wound Healing 0.2; Hand Skin Wound Disinfect 0.2; Wart/Corn Removal 0.1; Skin Protector/Emollients 0.1
Urinary & Reproductive	5%	0.5	Gynaecological 0.3; Urinary Condition 0.2; Urology 0.0; Male Condition 0.0
Pain Relief	8%	0.7	Muscular Pain 0.7; Mouth Pain 0.0; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Hungary Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	3%	0.2	Not available
Circulatory	2%	0.2	Antihemorrhoids 0.2; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	1%	0.1	Not available
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

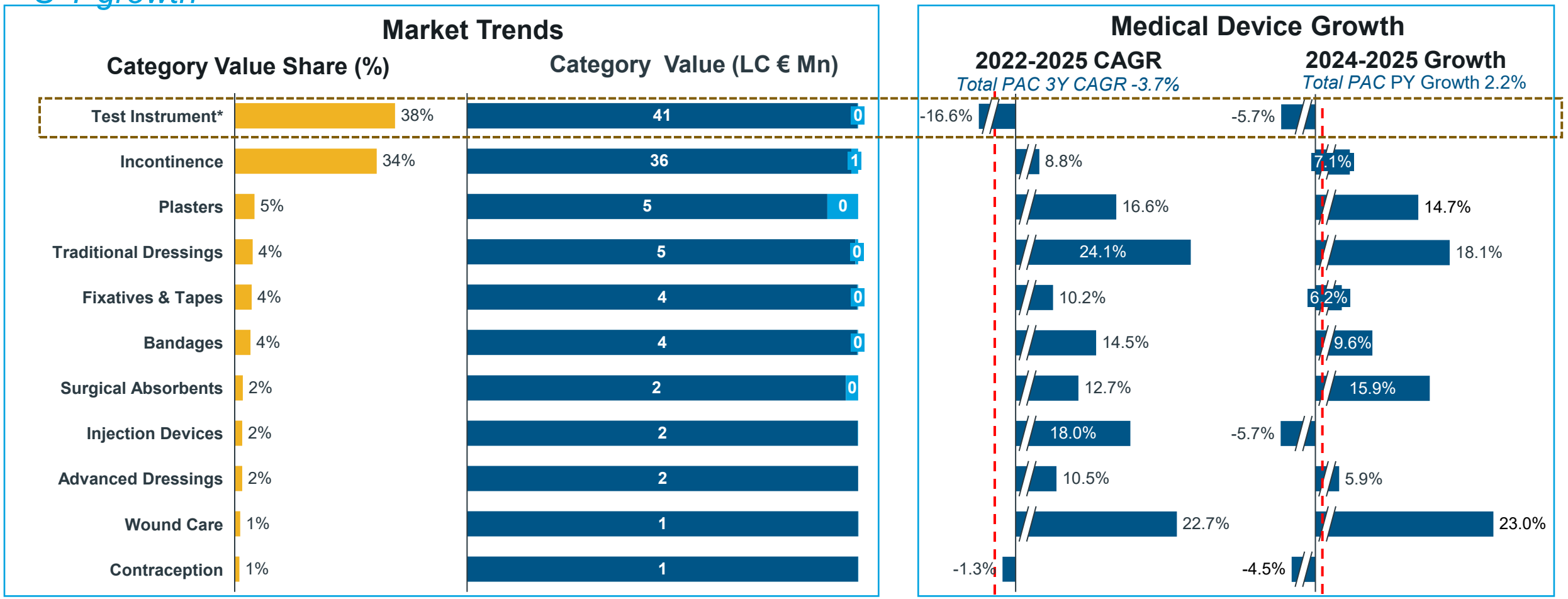
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Hungary PAC Performance by CHC 1 Category in 2025 (1/2)

*Test instrument leads medical devices values with **€41 Mn** sales; while other categories show L-T and S-T growth*

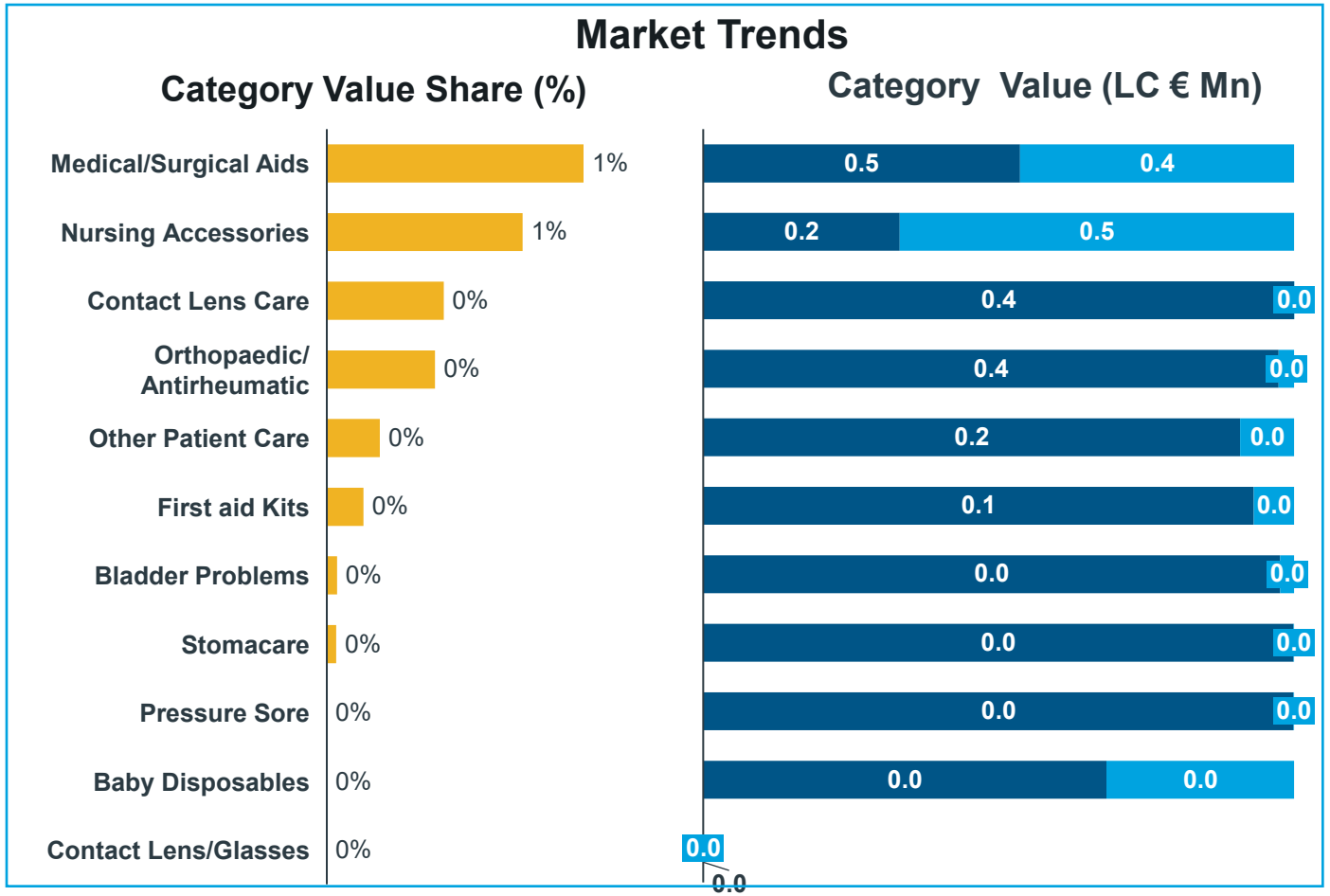


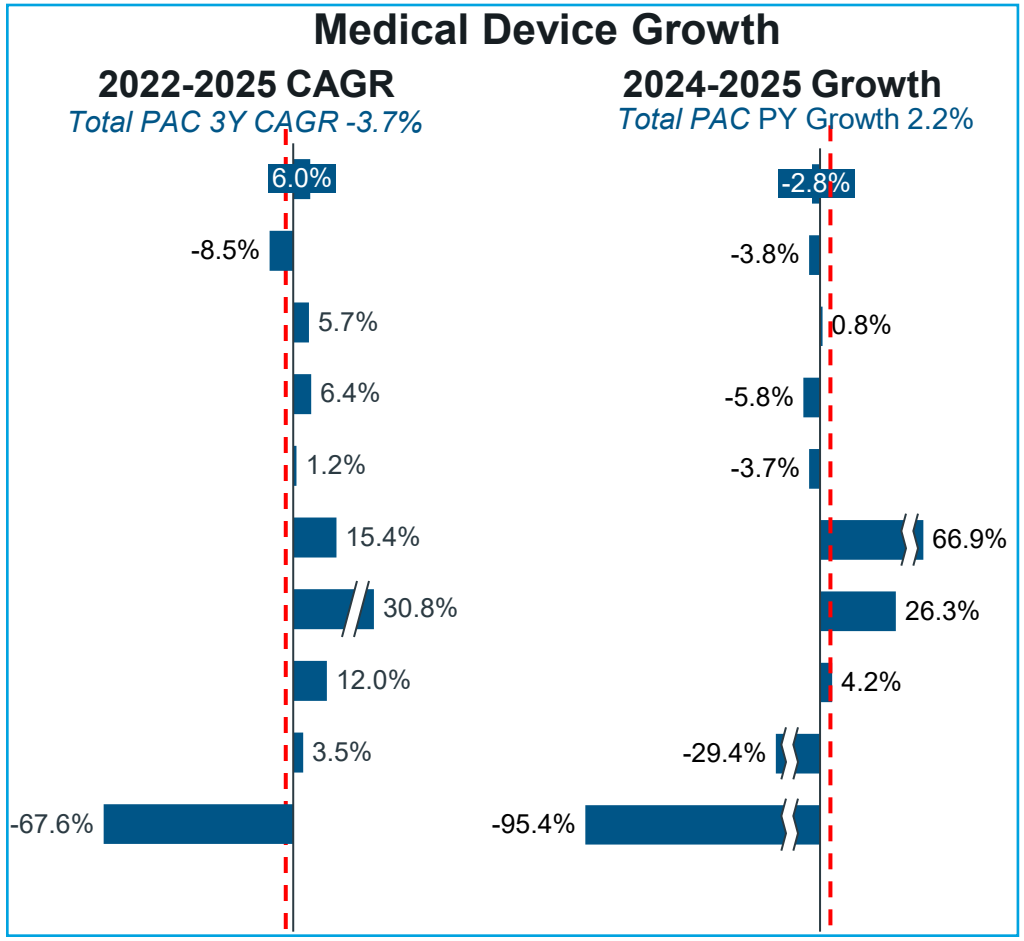
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Hungary PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like First aid kits, bladder problems and stomacare show promising growth in S-T and L-T



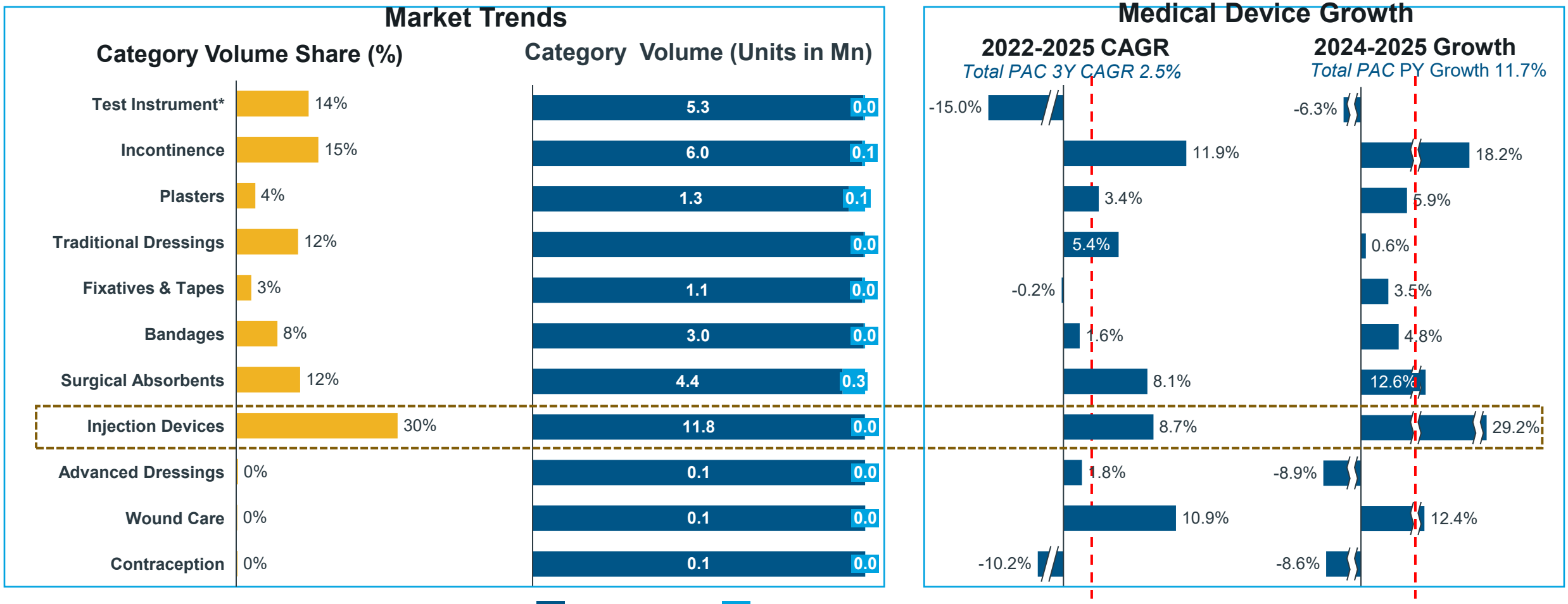


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Hungary PAC Performance by CHC 1 Category (1/2)

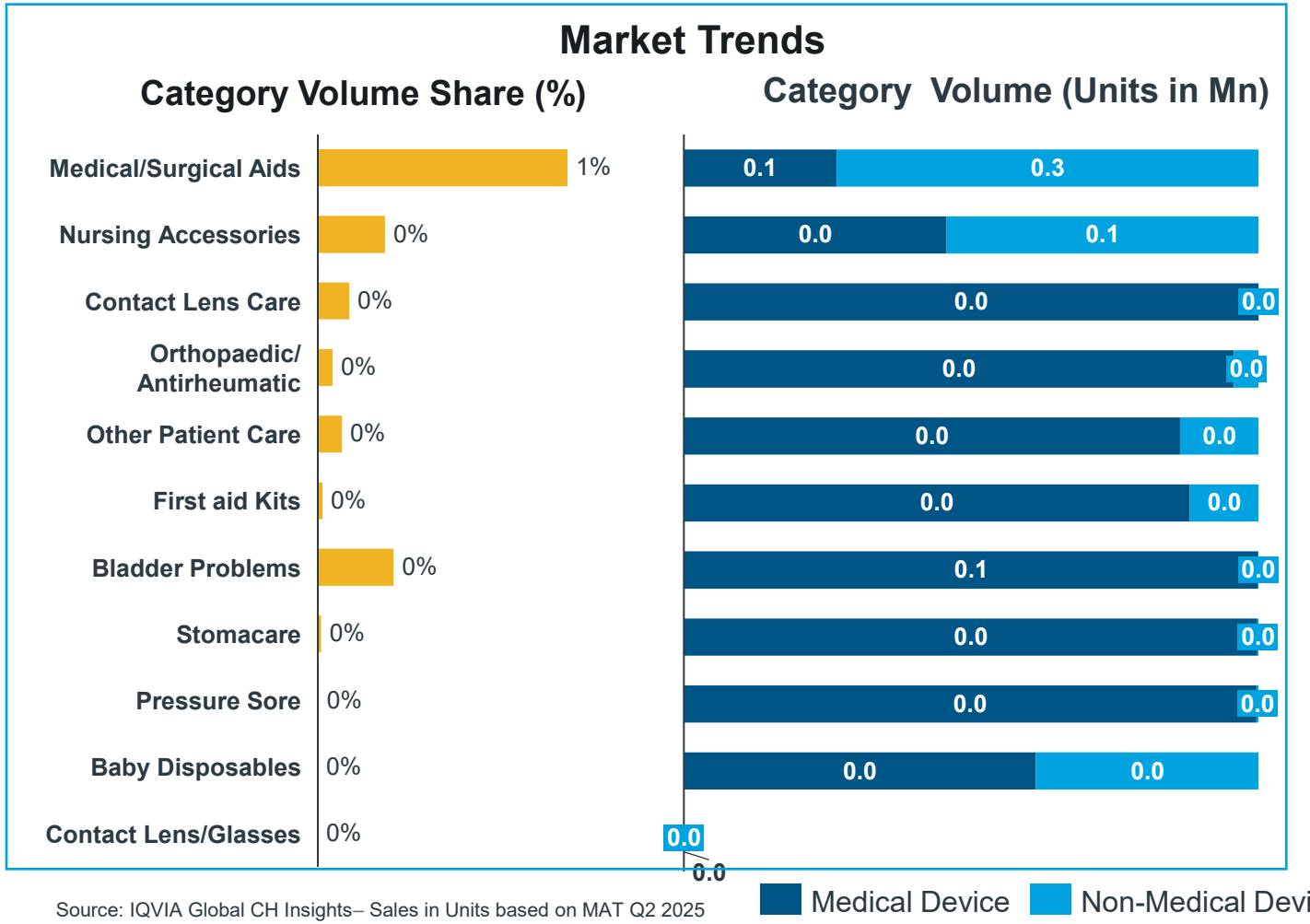
Injection devices show the highest volume shares within medical devices segment

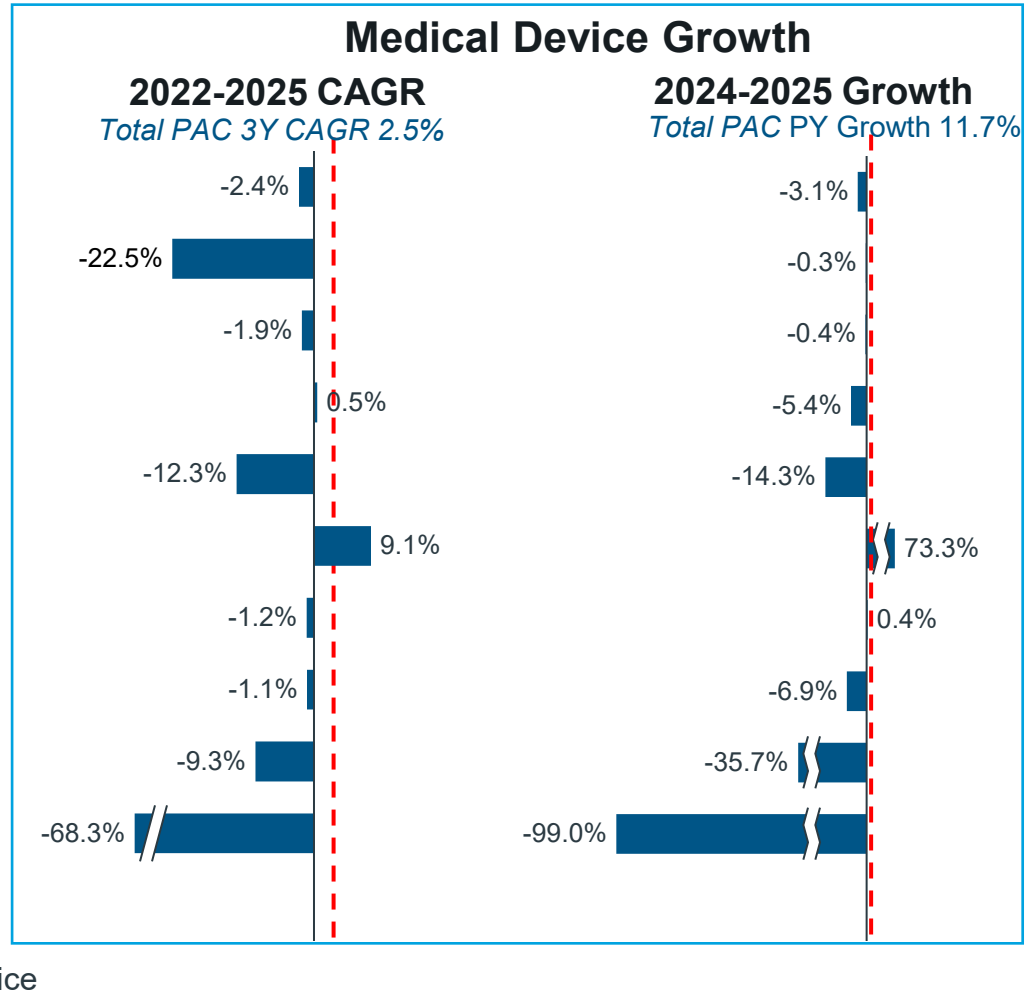


Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*Test instruments include both test and measuring instruments

Hungary PAC Performance by CHC 1 Category (2/2)

Categories like First aid kits show a promising growth trend S-T and L-T





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Hungary Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 85% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**104.7**	
Test Instrument	39%	41.0	Gluc Measuring 30.8; Blood Press Monitors 3.8; Thermometers 1.8; Coronavirus Test 1.8
Incontinence	34%	35.7	Mod Heav Sev Incont. 29.5; Light Incontinence 4.9; Bed Sheets/Pads 1.3; Incontinence care 0.0
Plasters	4%	4.7	Plaster Strip 3.0; Special Plaster 1.3; Plaster Spec. Uses 0.3; Liquid Plaster 0.0
Traditional Dressings	4%	4.6	Not available
Fixatives & Tapes	4%	4.3	Adhesive Tapes 3.6; Specical Tapes 0.8
Bandages	4%	4.0	Retention/Fixativ 3.1; Compression 0.7; Orthopaedic Casting 0.2

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Hungary Medical Devices Performance by top CHC 2 Segments

Moderate, heavy and severe incontinence products under Incontinence lead in volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**38.1**	
Test Instrument	14%	5.3	Gluc Measuring 3.7; Coronavirus Test 0.6; Pregnancy Test 0.5; Thermometers 0.3
Incontinence	16%	6.0	Mod Heav Sev Incont. 4.4; Light Incontinence 1.5; Bed Sheets/Pads 0.1; Incontinence care 0.0
Plasters	3%	1.3	Plaster Strip 0.9; Special Plaster 0.2; Plaster Spec. Uses 0.2; Liquid Plaster 0.0
Traditional Dressings	12%	4.5	Not available
Fixatives & Tapes	3%	1.1	Adhesive Tapes 0.9; Specical Tapes 0.2
Bandages	8%	3.0	Retention/Fixativ 2.8; Compression 0.2; Orthopaedic Casting 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

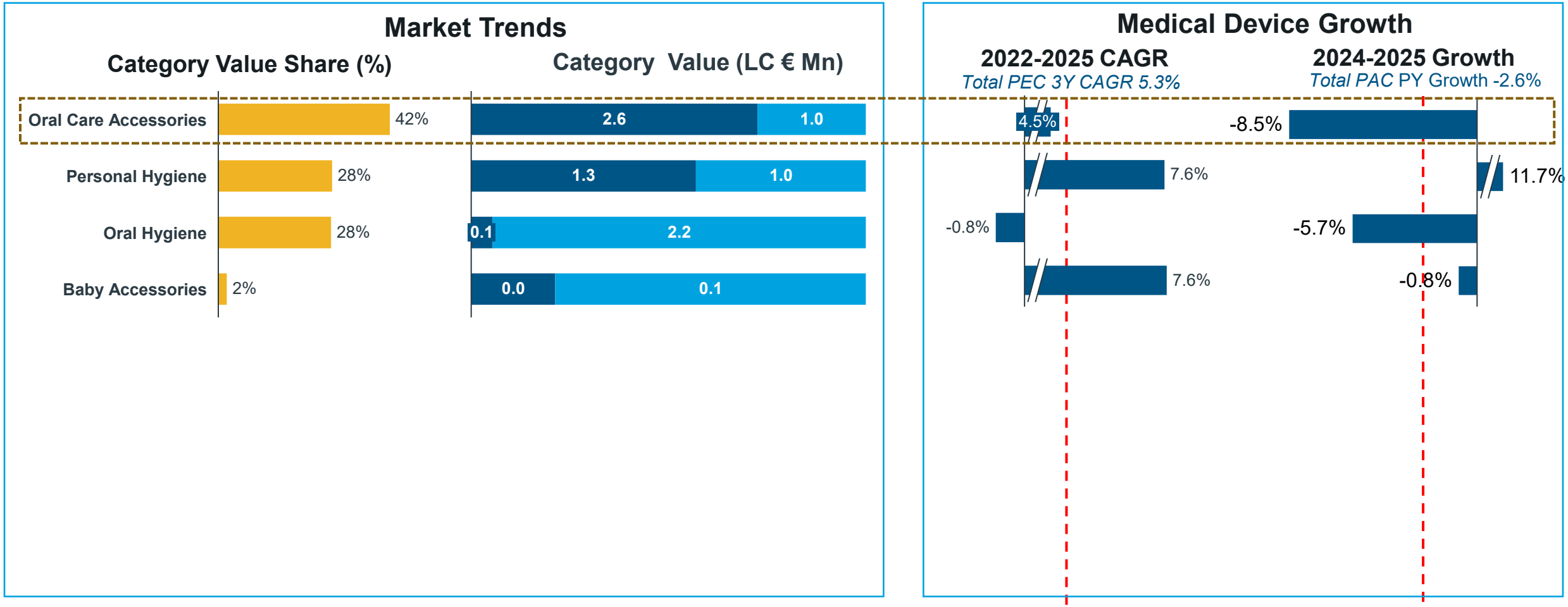
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Hungary PEC Performance by CHC 1 Category

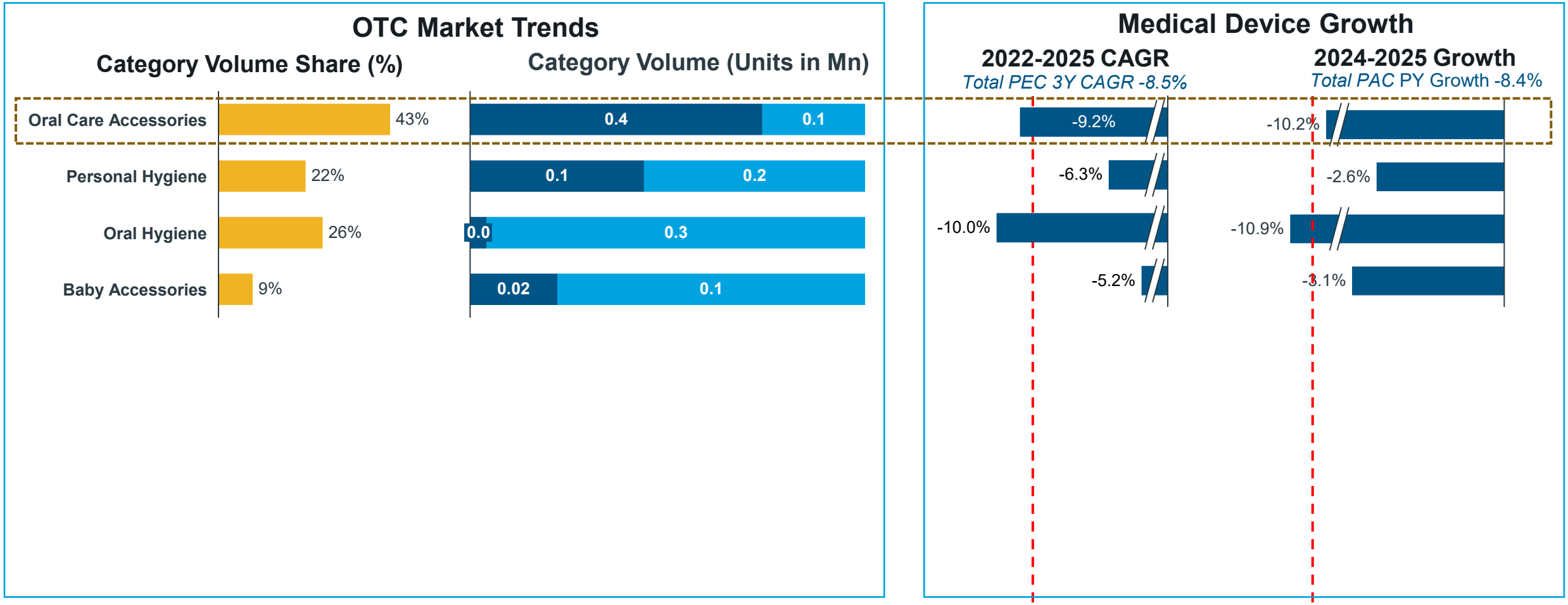
Oral care accessories leads medical devices values



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Hungary PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Medical Device

Non-Medical Device

Hungary Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**4.1**	
Oral Care Accessories	63%	2.6	Denture Products 2.6; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Sticks 0.0
Personal Hygiene	33%	1.3	Intimate Hygiene 1.3; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Hygiene	3%	0.1	Toothpastes 0.1; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	1%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Hungary Medical Devices Performance by top CHC 2 Segments

Denture products under Oral Care Accessories lead in volumes as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.6**	
Oral Care Accessories	72%	0.4	Denture Products 0.4; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Sticks 0.0
Personal Hygiene	22%	0.1	Intimate Hygiene 0.1; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Hygiene	2%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	4%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

IQVIA CONSUMER HEALTH

Bulgaria Medical Devices – Market Dynamics

Bulgaria Medical Devices Performance Overview

Medical devices has been growing L-T at 11.6% reaching ~188 Mn in 2025

26%

Medical device share of total CH value in 2025

Long –term Growth

11.6% by value

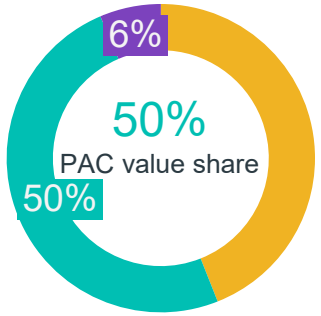
- 4.2% by volume

Short –term Growth

13.7% by value

2.0% by volume

Medical Devices – €188 Mn(2025)



Long-term Growth (Value)

11% OTC

11% PAC

20.6% PEC

Medical Devices Categories

29%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **64%** of new pack launches

Medical Devices Innovation

Test Instruments

49% Share of total PAC values in 2025; Dominated by **Gluc measuring**

Long-term Growth

11.5% by value

PAC (Patient care)

CCR

47% *Share for total OTC value in 2025, Dominated by **Sore Throat***

Long-term Growth

11.3% by value

OTC (Over-the-Counter)

Oral Care Accessories

78% *Share of total PEC value share in 2022; Dominated by **Denture products***

Long term Growth

20.5% by value

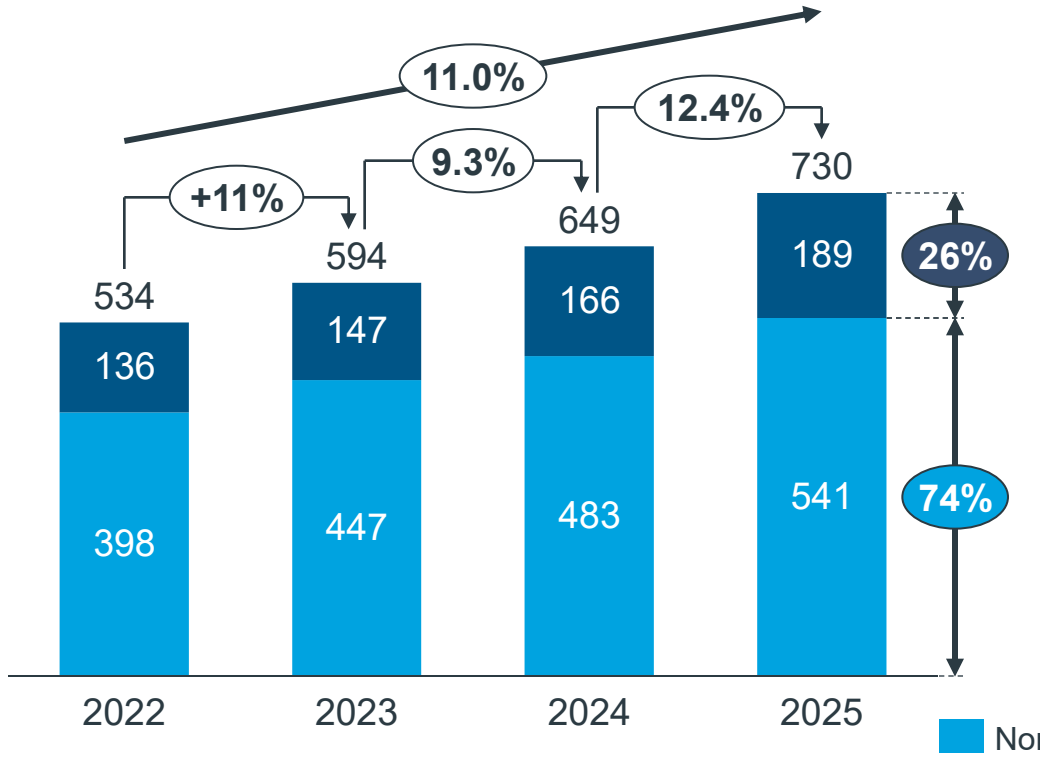
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

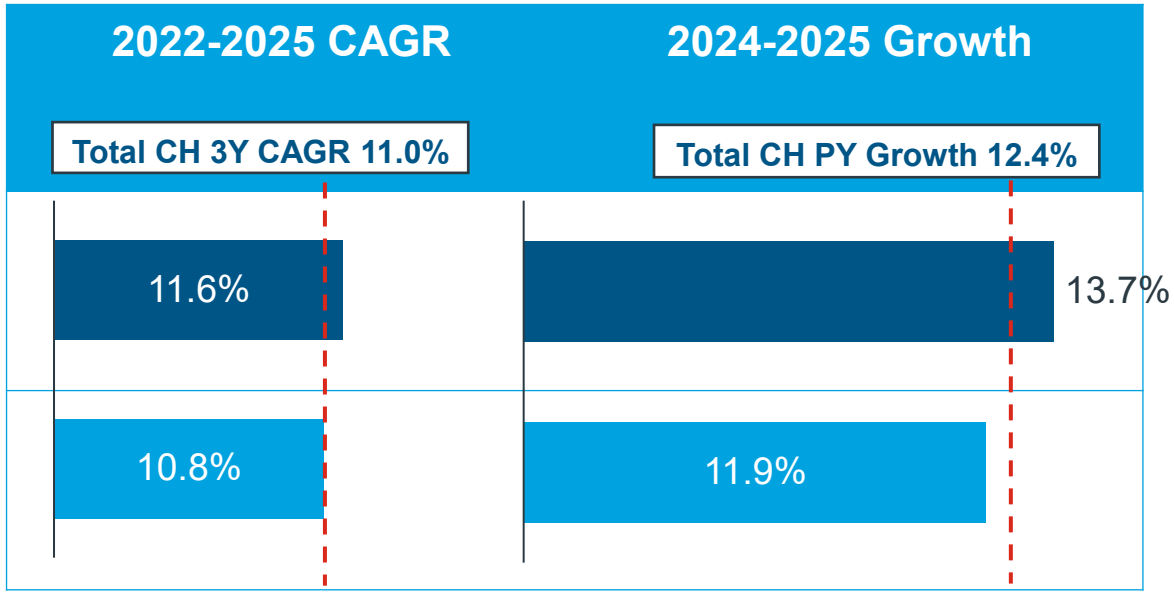
Bulgaria CH Market Size & Growth

The CH market has grown by 11% between 2022 and 2025, with medical devices making up 26% of the market shares and growing in double digit in L-T and S-T

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

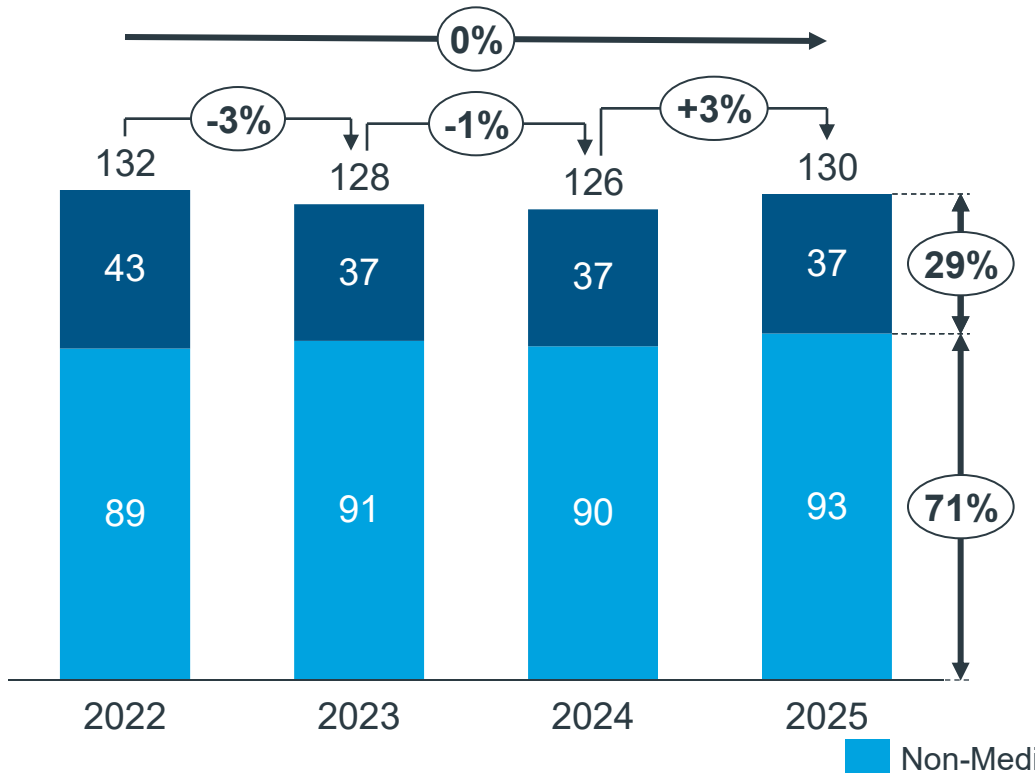


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

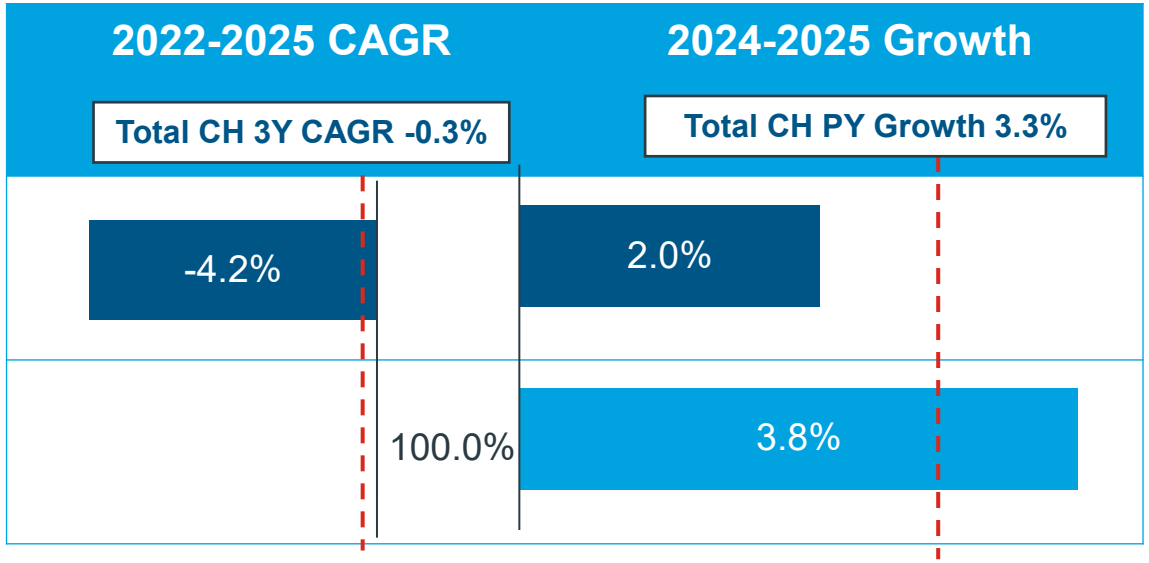
Bulgaria CH Market Volume & Growth

Medical devices account for 29% of the CH market volume, showing a S-T positive growth, while overall market has been flat between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Bulgaria CH Performance by Classes

*PAC leads with **€94 Mn** in medical device sales and positive growth in L-T and S-T*

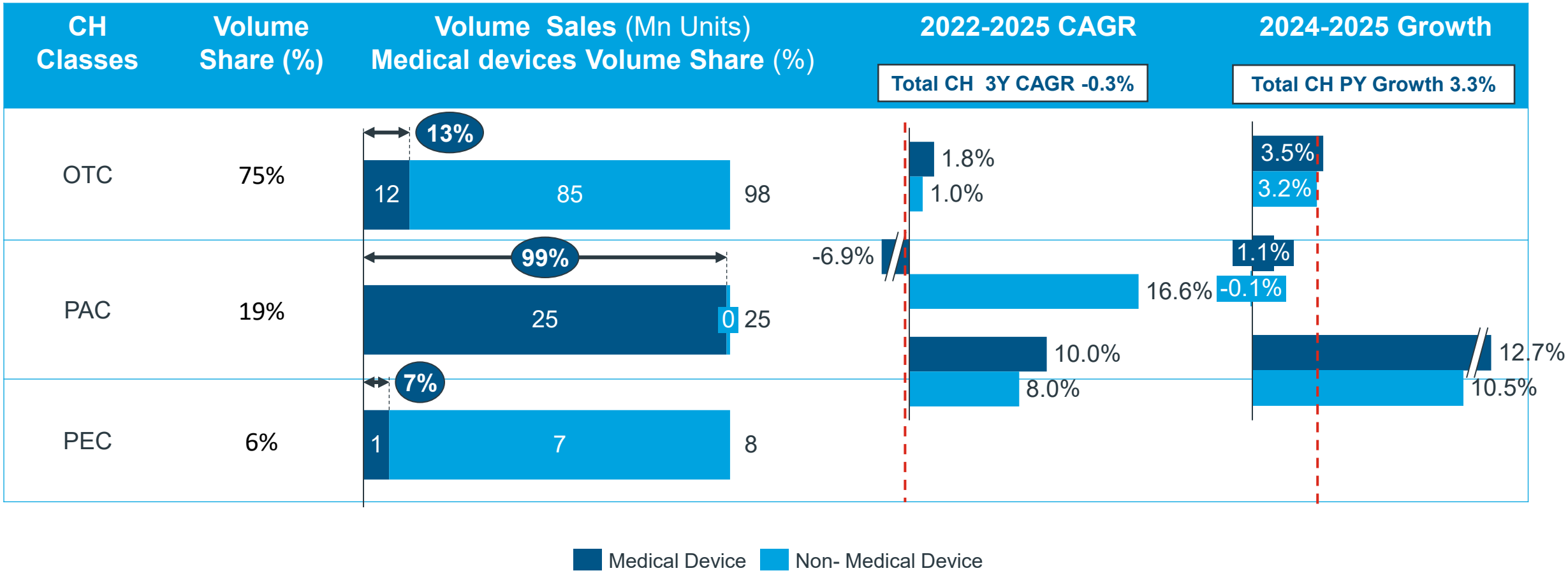
CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR (Total CH 3Y CAGR 11.0%)	2024-2025 Growth (Total CH PY Growth 12.4%)
OTC	82%	14%; 83 / 513 / 596	11.0% / 10.4%	10.7% / 11.7%
PAC	13%	100%; 94 / 0 / 94	11.0% / 7.6%	15.4% / 15.4%
PEC	5%	31%; 12 / 27 / 39	20.6% / 17.7%	22.2% / 16.2%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Bulgaria CH Performance by Classes

Patient Care leads in medical device volume sales with 25mn units and holds the highest medical device volume share (99%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Bulgaria Medical Devices Packs & New Launches

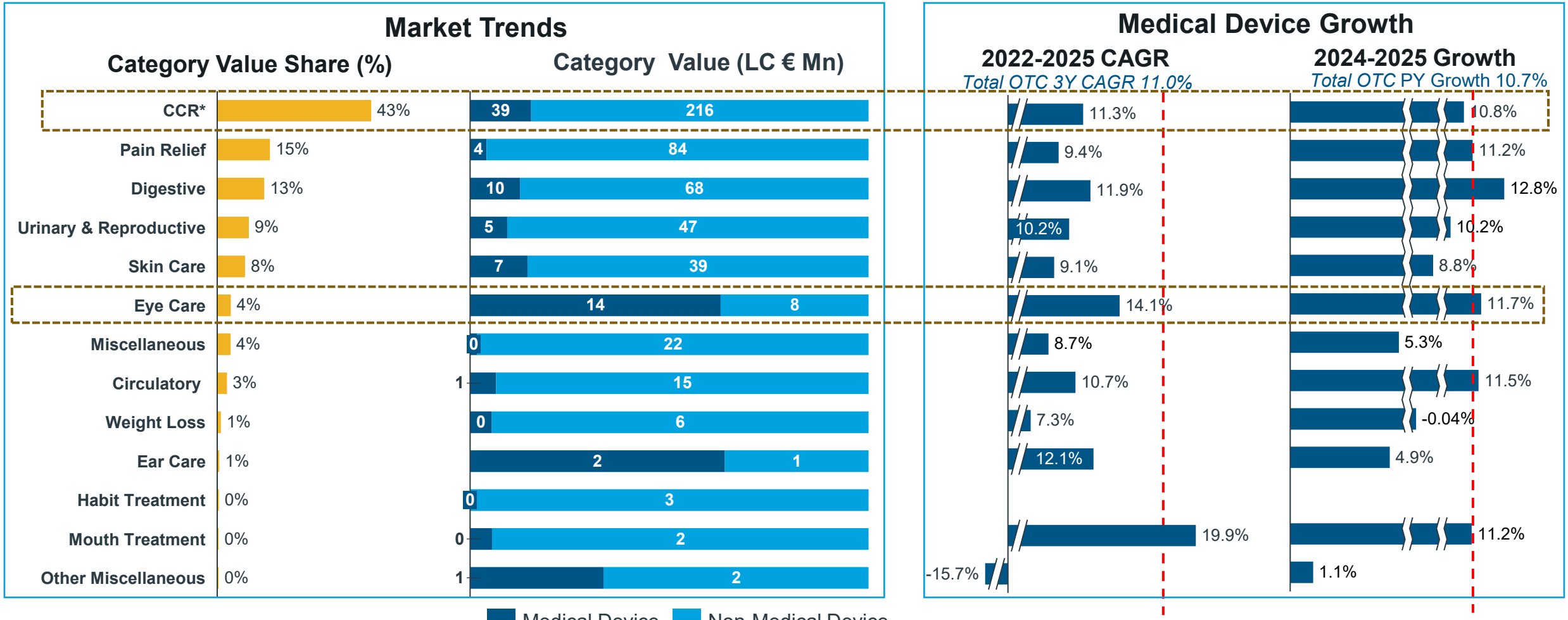
The majority of the Medical devices new launches come from Patient Care category in last 3 years

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	1,772	4,148	**5,920**	351	844	**1,195**
OTC	489	3,017	**3,506**	104	645	**749**
Patient Care	1,160	149	**1,309**	225	27	**252**
Personal Care	123	982	**1,105**	22	172	**194**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Bulgaria OTC Performance by CHC 1 Category in 2025

*CCR leads the medical devices values with **€39 Mn** sales, followed by Eye Care at **€14 Mn***

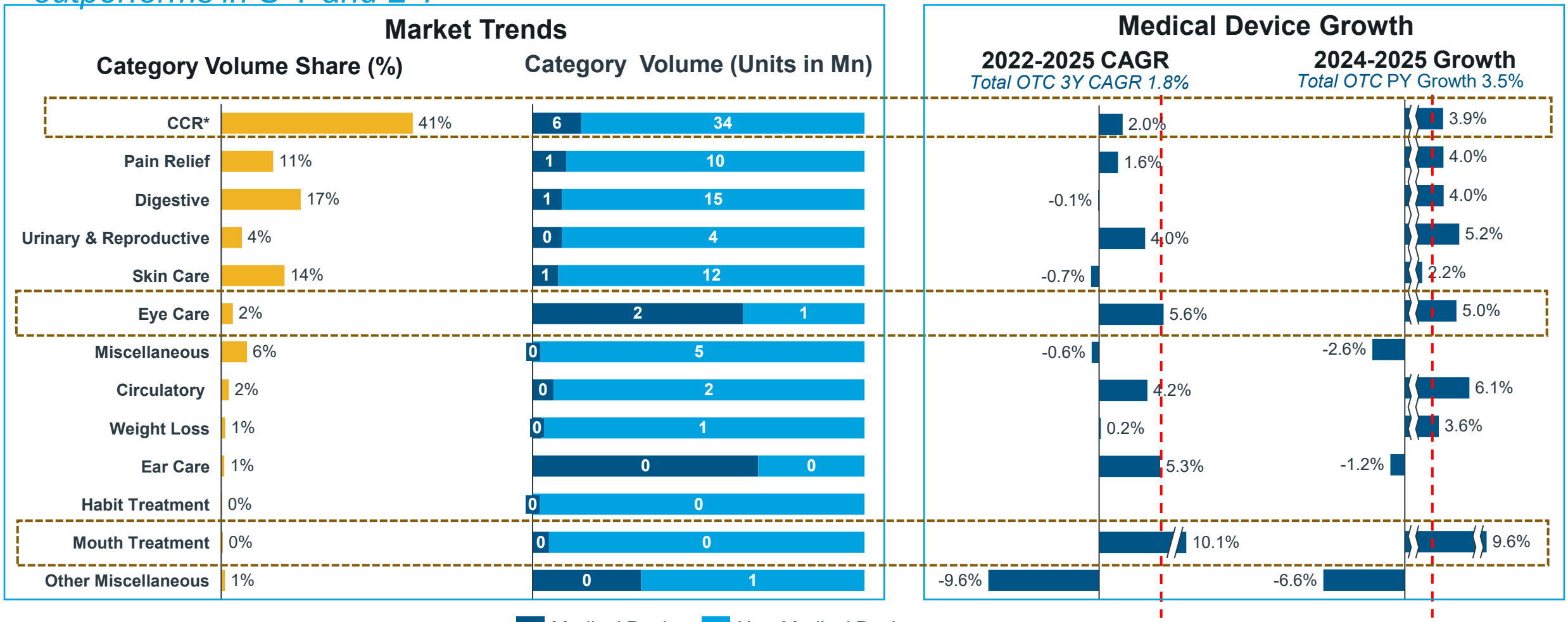


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Bulgaria OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share, while eye care and mouth treatment outperforms in S-T and L-T



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Bulgaria Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by Sore throat in CCR product segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**83.0**	
CCR	47%	39.1	Sore Throat 10.7; Nasal Saline 10.6; Other Respiratory 8.0; Cough 6.8
Eye Care	17%	14.2	Not available
Digestive	12%	9.8	Laxatives 3.5; Acid & Heartburn 2.8; Digestive 2.4; Antidiarrhoeals 1.1
Skin Care	8%	6.6	Wound Healing 1.6; Skin Protector/Emollients 1.5; Antifungals 1.1; Skin Irritation 1.1
Urinary & Reproductive	6%	4.9	Gynaecological 4.6; Urinary Condition 0.3; Urology 0.0; Male Condition 0.0
Pain Relief	4%	3.6	Muscular Pain 2.0; Mouth Pain 1.6; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Bulgaria Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear care	3%	2.3	Not available
Circulatory	1%	1.0	Antihemorrhoids 1.0; Chloesterol Regulating 0.0; Other Circulatory 0.1
Other Miscellaneous	1%	0.8	Not available
Miscellaneous	0%	0.4	Not available
Weight Loss	0%	0.3	Not available
Mouth Treatment	0%	0.1	Mouth Infection 0.1; Other Mouth Treatment 0.0; Fluoride Products 0.0
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Bulgaria Medical Devices Performance by top CHC 2 Segments

CCR makes up about half of all volume sales of medical devices

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**12.3**	
CCR	48%	5.9	Antiallergics 0.1; Asthma 0.0; Cold Remedies 0.3; Cough 0.8
Eye Care	13%	1.5	Not available
Digestive	12%	1.5	Acid & Heartburn 0.4; Antidiarrhoeals 0.1; Digestive 0.4; Laxatives 0.6
Skin Care	8%	1.0	Acne Care 0.1; Antifungals 0.0; Cold Sore 0.0; Hand Skin Wound Disinfect 0.3
Urinary & Reproductive	3%	0.4	Gynaecological 0.4; Urinary Condition 0.0; Urology Male Condition 0.0
Pain Relief	9%	1.1	Antispasmodic 0.0; Dysmenorrhea 0.0; Joint Care 0.0; Mouth Pain 0.3

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Bulgaria Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear care	4%	0.4	Not available
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	2%	0.3	Not available
Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Mouth Treatment	0%	0.0	Fluoride Products 0.0; Mouth Infection 0.0; Other Mouth Treatment 0.0
Habit Treatment	0%	0.0	Nail Biting 0.0; Other Habit 0.0; Smoking control 0.0

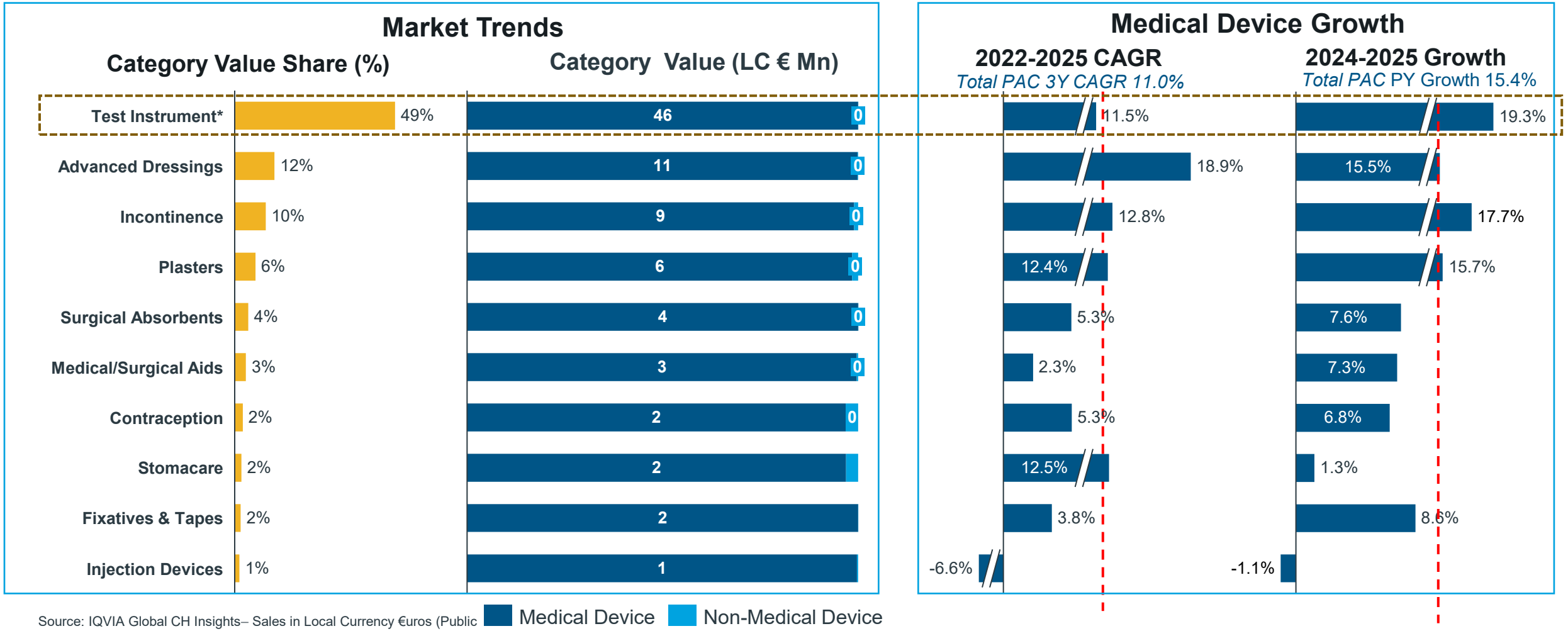
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Bulgaria PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instrument leads medical devices values with **€46 Mn** sales*

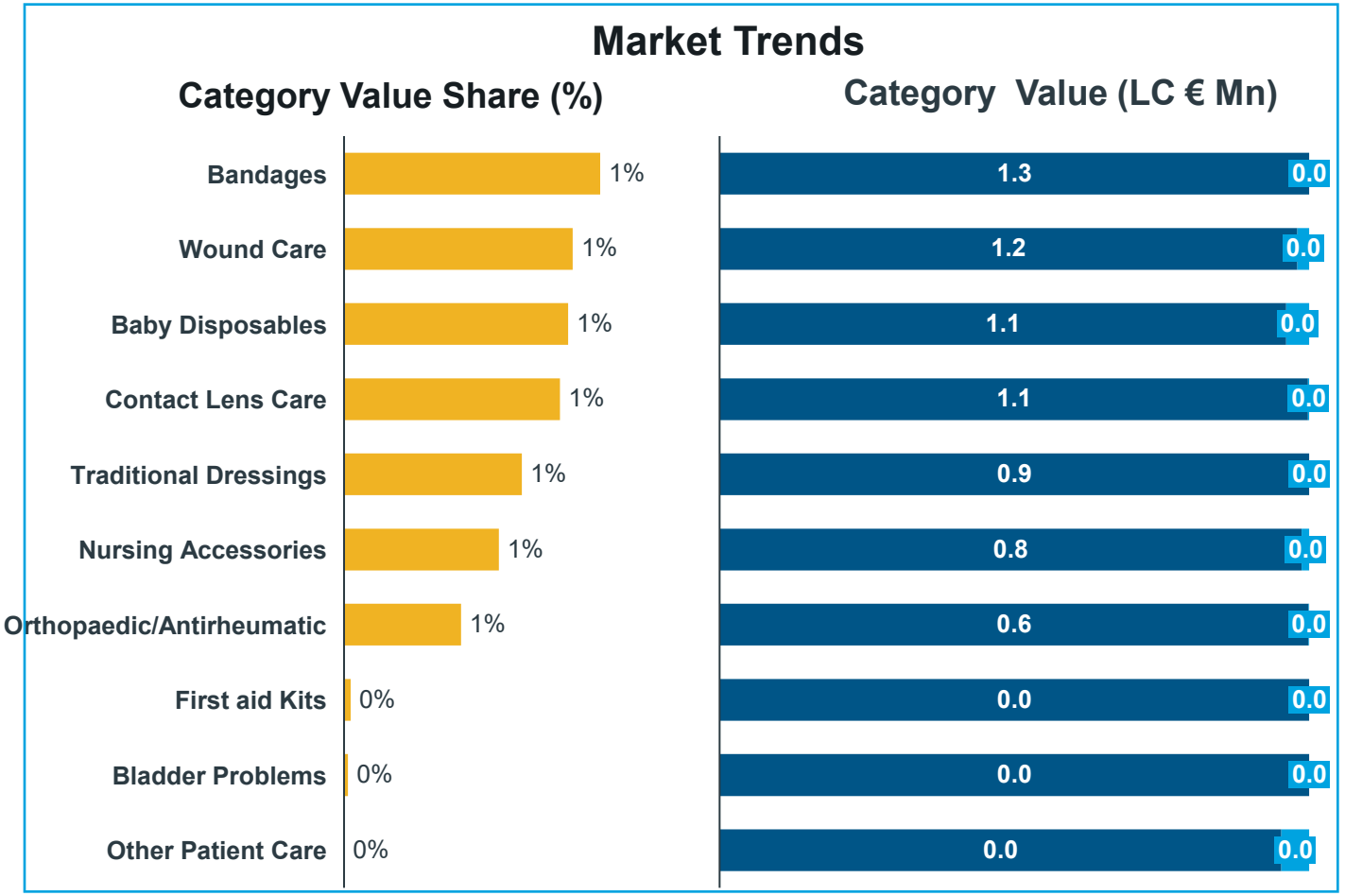


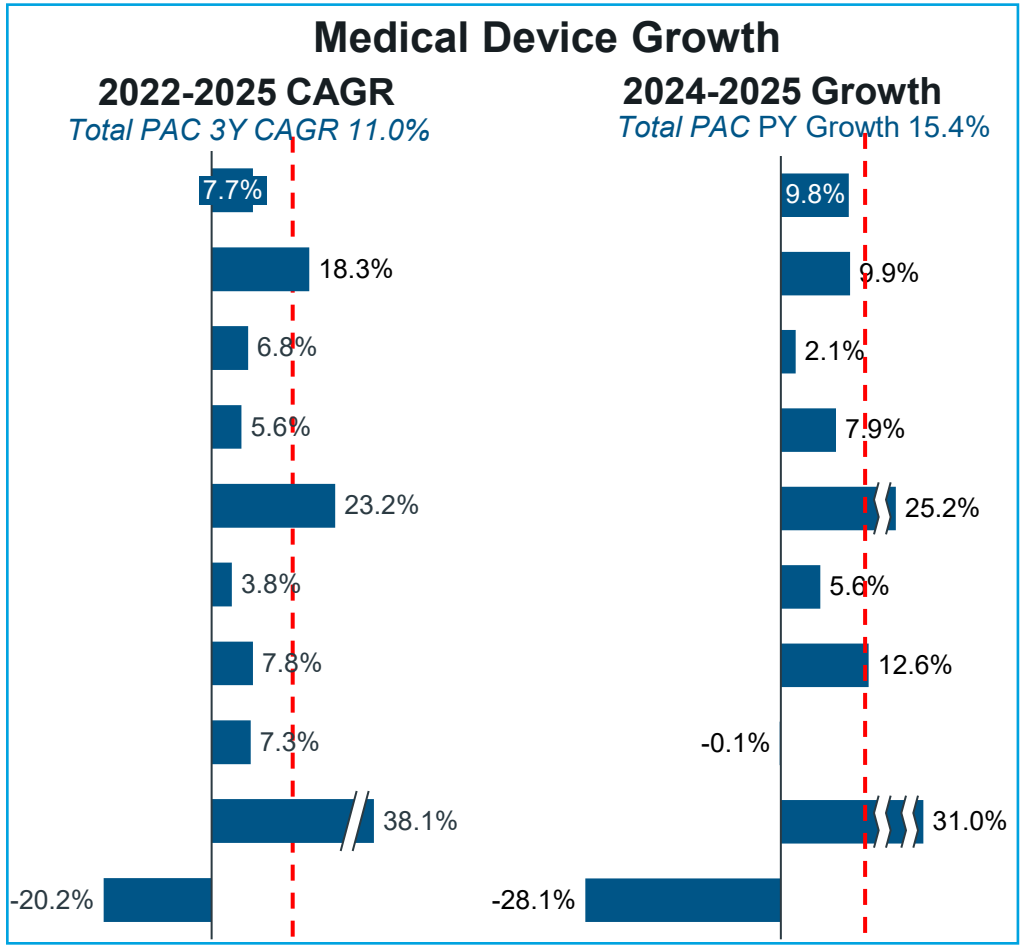
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Bulgaria PAC Performance by CHC 1 Category in 2025 (2/2)

Most of the smaller categories record positive growth





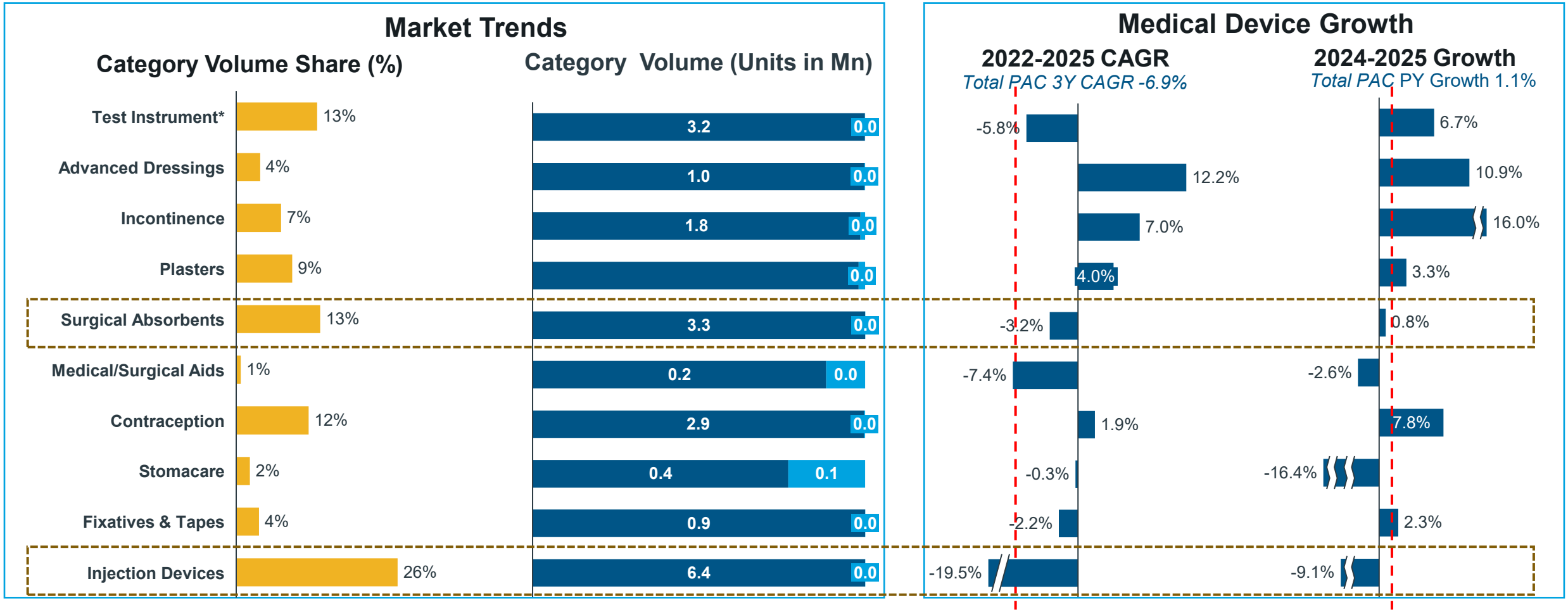
Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Bulgaria PAC Performance by CHC 1 Category (1/2)

Injection Devices hold the highest medical devices volume share, followed by Surgical Absorbents



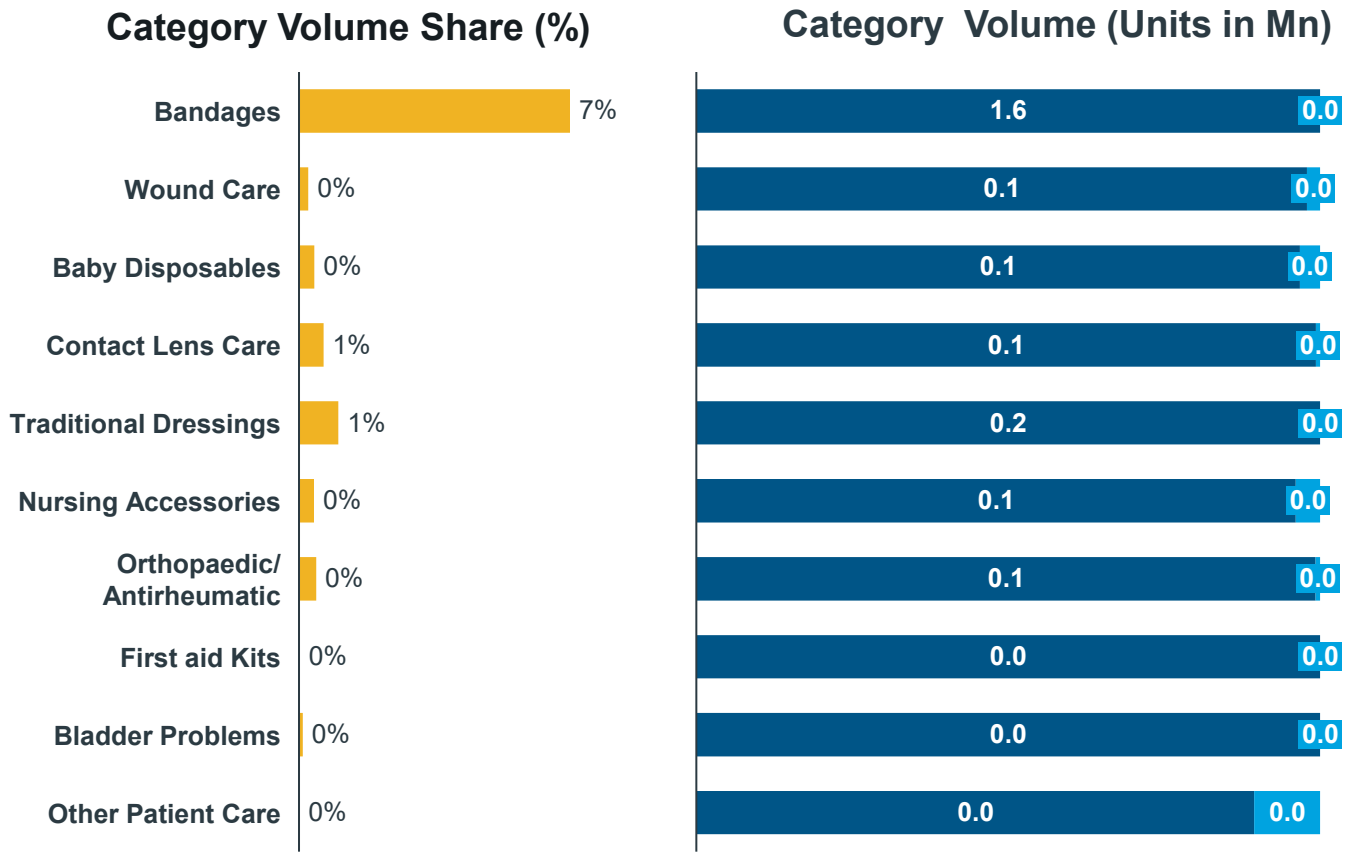
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

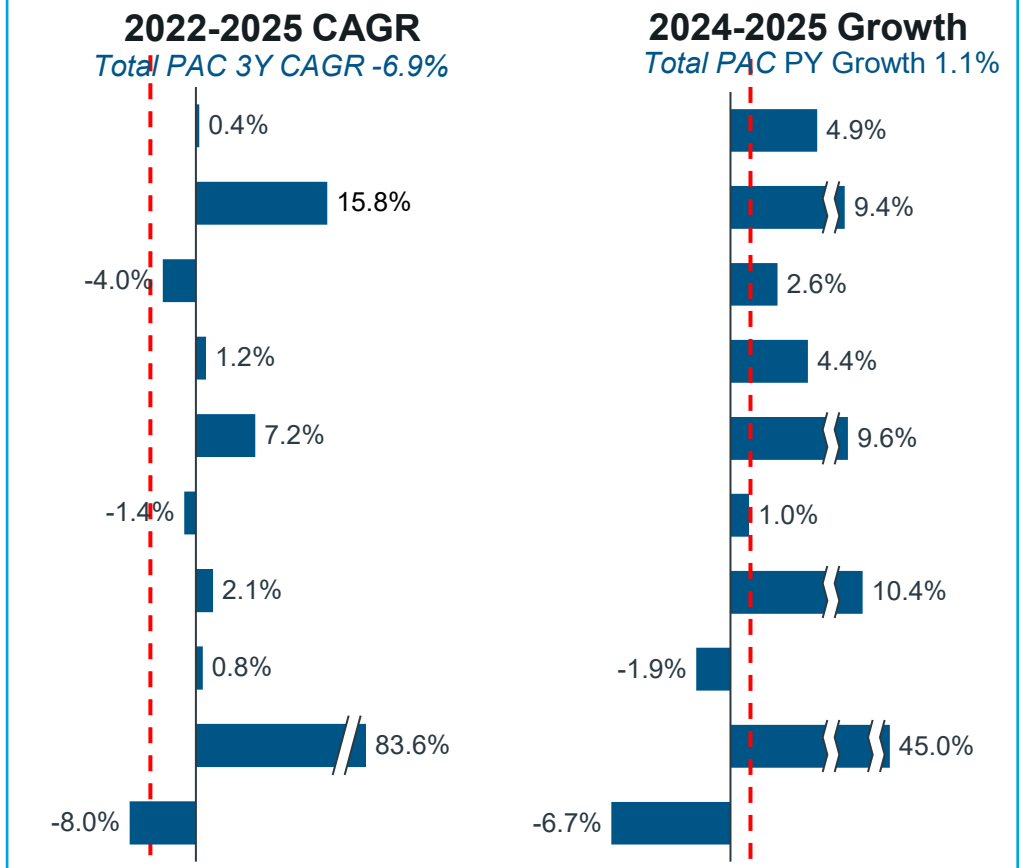
Bulgaria PAC Performance by CHC 1 Category (2/2)

Bladder problems see a remarkable S-T and L-T volume growth

Market Trends



Medical Device Growth



Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Bulgaria Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 80% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**93.6**	
Test Instrument	49%	46.1	Gluc Measuring 27.8; Blood Press Monitors 11.1; Pregnancy Test 3.3; Thermometers 2.6
Advanced Dressings	12%	11.4	Hyaluron 10.0; Base Tech 1.1; Anti-Infection 0.3
Incontinence	9%	8.8	Mod Heav Sev Incont. 5.3; Bed Sheets/Pads 2.3; Light Incontinence 1.2; Incontinence care 0.0
Plasters	6%	5.9	Plaster Strip 3.8; Special Plaster 1.9; Liquid Plaster 0.3; Plaster Spec. Uses 0.0
Surgical Absorbents	4%	3.9	Packs & Patches 2.5; Swabs & Pads 1.0; Cotton wool 0.4
Medical/ Surgical Aids	3%	3.2	Inhalation & Aerosol 2.8; Hot & Cold Packs 0.2; Enemas/Douches+Cannulas 0.1; Miscellaneous 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Bulgaria Medical Devices Performance by top CHC 2 Segments

Packs and Patches under Surgical Absorbents lead in volumes in medical/surgical aids category

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**24.6**	
Test Instrument	13%	3.2	Gluc Measuring 1.4; Pregnancy Test 1.1; Thermometers 0.3; Blood Press Monitors 0.2
Advanced Dressings	4%	1.0	Hyaluron 0.7; Base Tech 0.2; Anti-Infection 0.0
Incontinence	7%	1.8	Mod Heav Sev Incont. 0.9; Bed Sheets/Pads 0.5; Light Incontinence 0.3; Incontinence care 0.0
Plasters	9%	2.2	Plaster Strip 1.8; Special Plaster 0.3; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Surgical Absorbents	14%	3.3	Packs & Patches 2.1; Swabs & Pads 0.8; Cotton wool 0.4
Medical/ Surgical Aids	1%	0.2	Inhalation & Aerosol 0.1; Hot & Cold Packs 0.0; Miscellaneous 0.0; Enemas/Douches+Cannulas 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

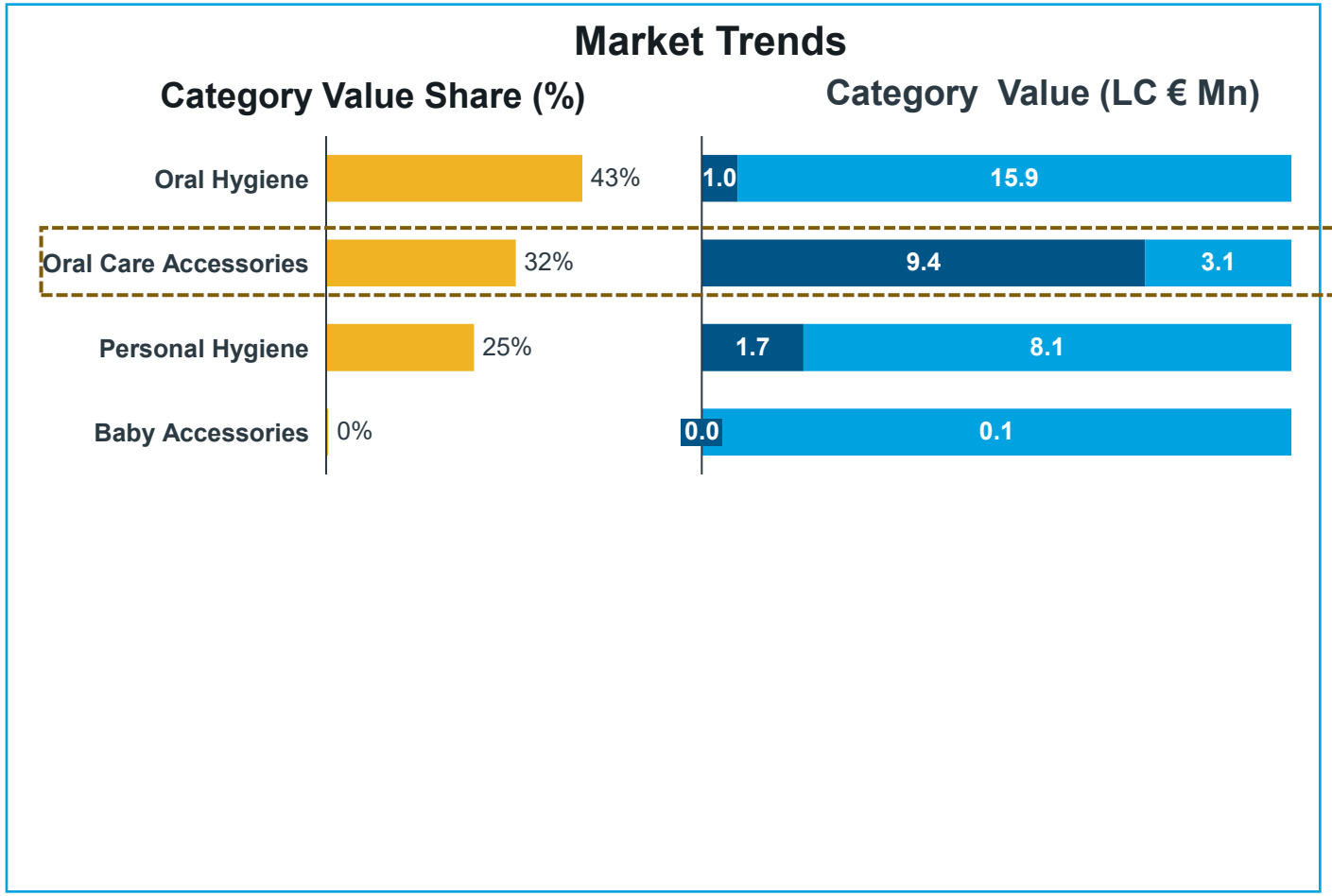
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

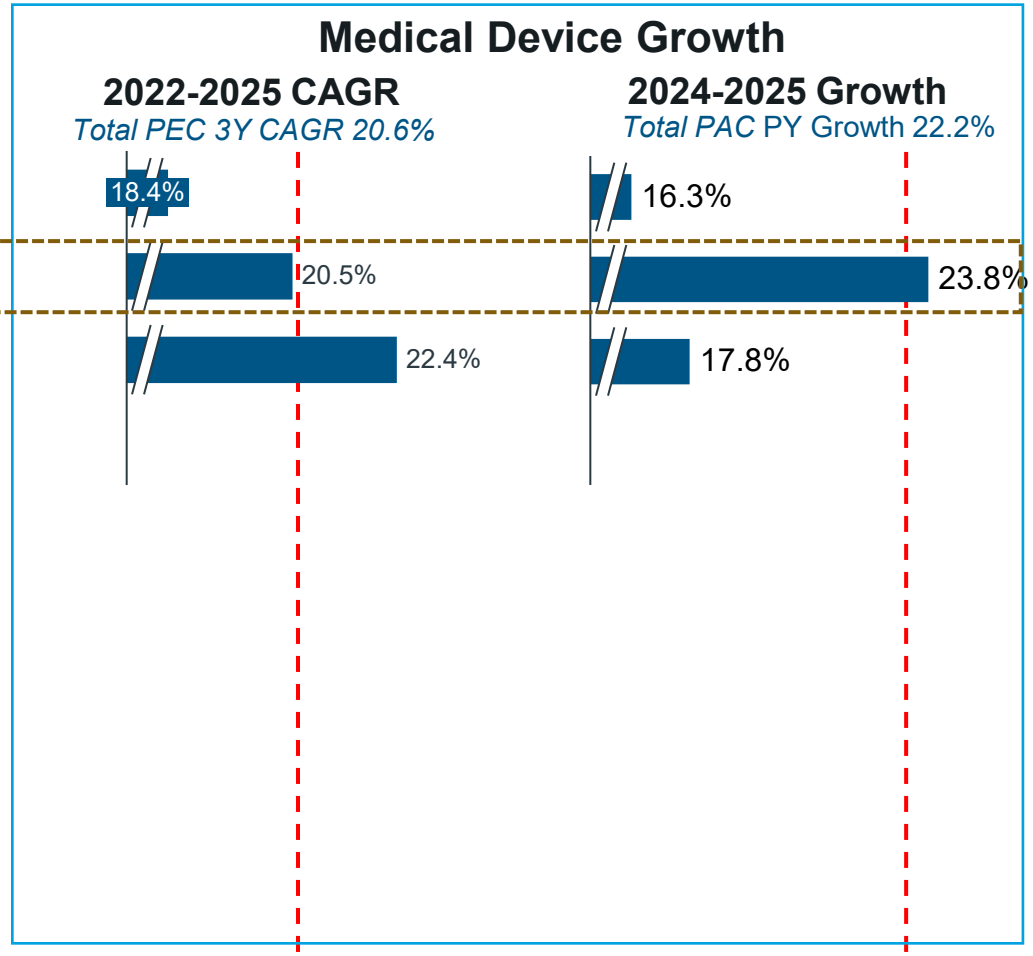
Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Bugaria PEC Performance by CHC 1 Category

Oral care accessories leads medical devices values; showing positive growth in L-T & S-T



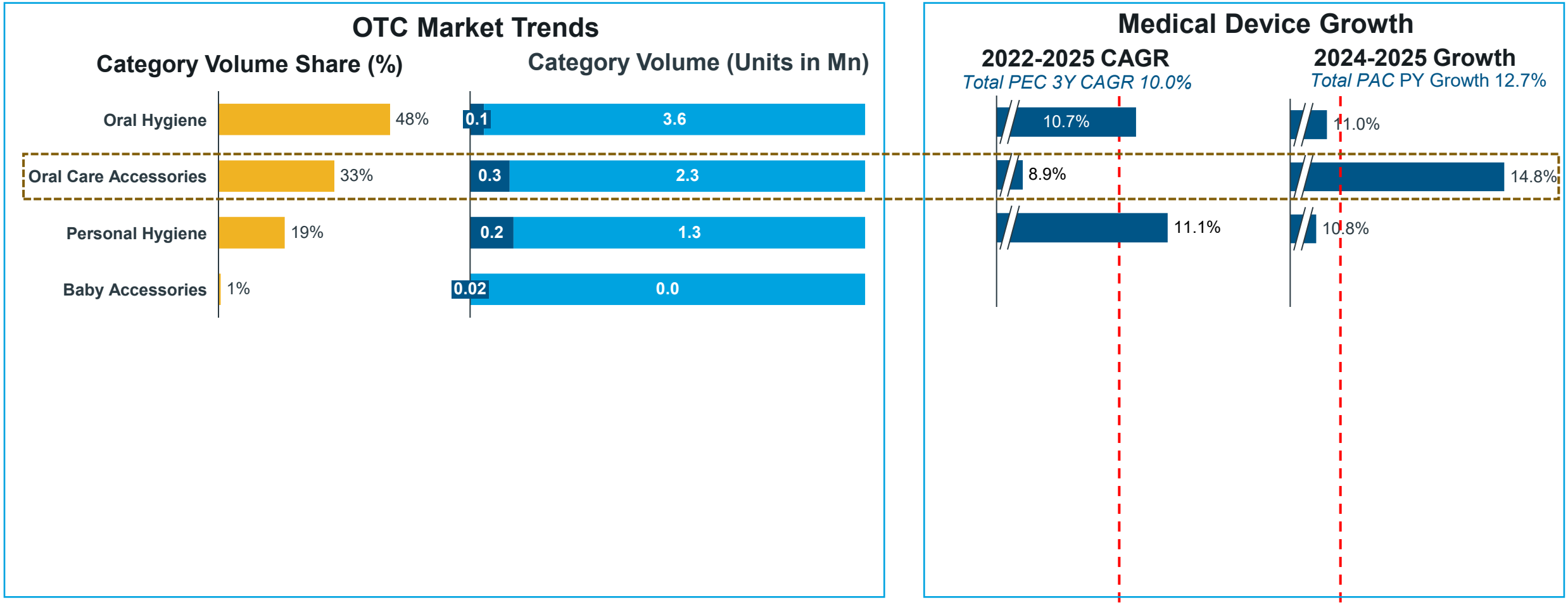


Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Bulgaria PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes within the medical devices segment as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Bulgaria Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**12.1**	
Oral Care Accessories	78%	9.4	Denture Products 9.2; Toothbrushes 0.0; Interdental Brushes 0.1; Dental Floss 0.0
Personal Hygiene	14%	1.7	Intimate Hygiene 1.7; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	8%	1.0	Mouthwashes 0.6; Toothpastes 0.3; Other Oral Care 0.1
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Bulgaria Medical Devices Performance by top CHC 2 Segments

Oral Care Accessories share the largest volume of medical devices as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.5**	
Oral Care Accessories	47%	0.3	Denture Products 0.2; Toothbrushes 0.0; Interdental Brushes 0.0; Dental Floss 0.0
Personal Hygiene	29%	0.2	Intimate Hygiene 0.2; Foot Hygiene 0.0; Hand Hygeine w/o Soap 0.0
Oral Hygiene	24%	0.1	Mouthwashes 0.0; Toothpastes 0.1; Other Oral Care 0.0
Baby Accessories	0%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Finland Medical Devices – Market Dynamics

Finland Medical Devices Performance Overview

Medical devices in Finland show an overall growth trend; OTC and Personal Care segments demonstrate long-term growth in value

26%

Medical device share of total CH value in 2025

Long –term Growth

1.8% by value

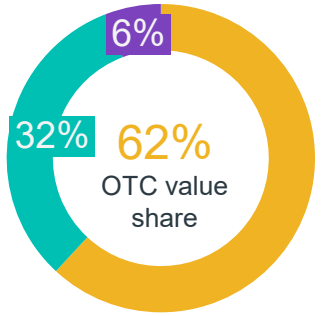
-1.8% by volume

Short –term Growth

6.1% by value

0.4% by volume

Medical Devices – €143 Mn (2025)



Long-term Growth (Value)

7.5% OTC

-7.4% PAC

11.5% PEC

Medical Devices Categories

62%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **94%** of new pack launches

Medical Devices Innovation

Eye care

44% *Share for total OTC value in 2025*

Long-term Growth

10.1% by value

OTC (Over-the-Counter)

Test Instruments

20% *Share of total PAC values in 2025; Dominated by **Thermometers***

Long-term Growth

-25.8% by value

PAC (Patient care)

Personal Hygiene

74% *Share of total PEC value share in 2025; Dominated by **Intimate hygiene***

Long term Growth

14.1% by value

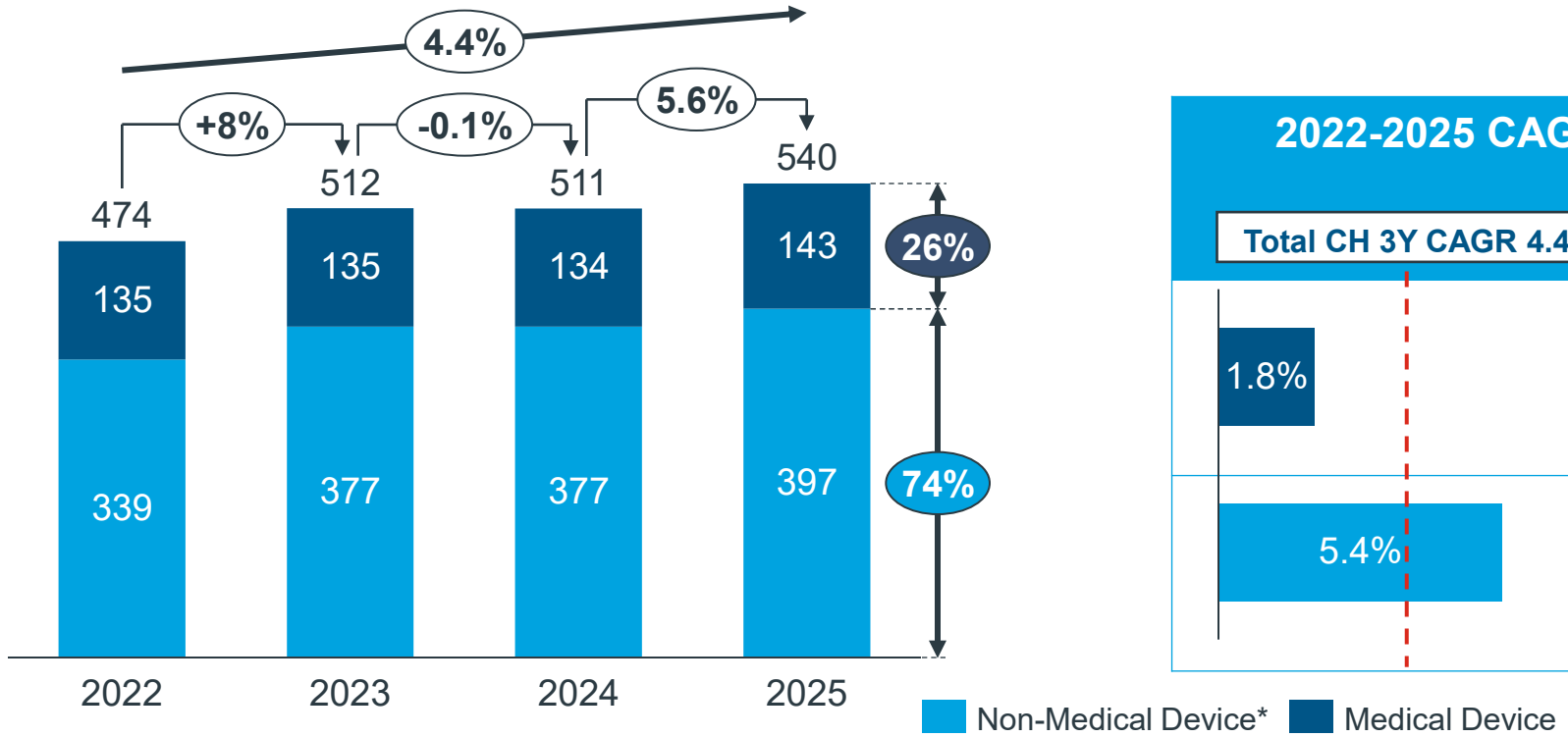
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

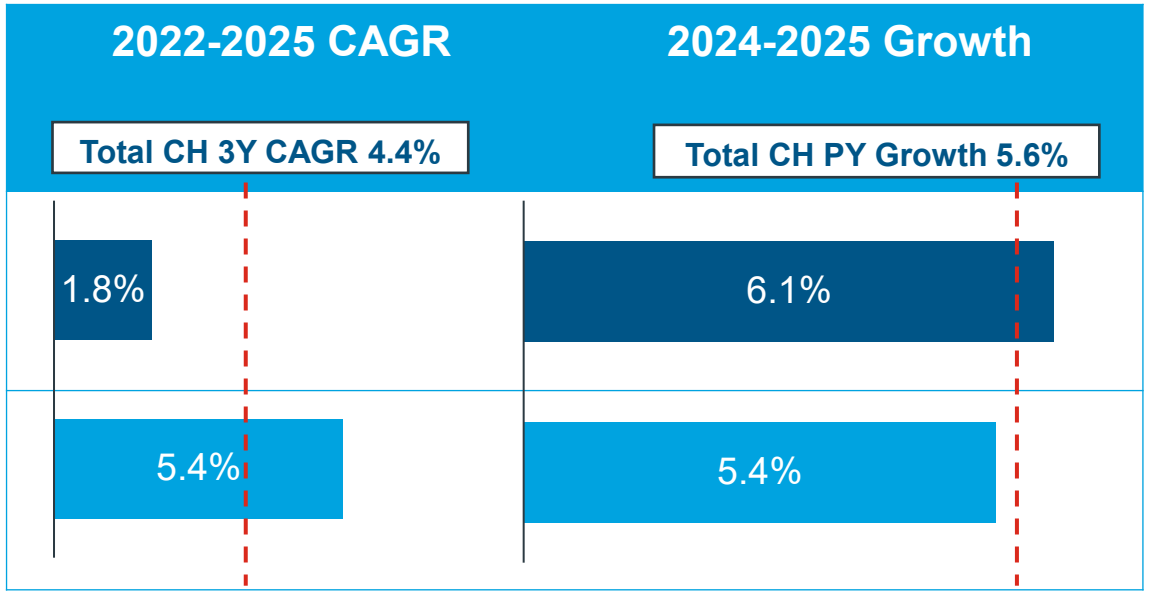
Finland CH Market Size & Growth

Medical devices experienced strong PY and long-term growth, representing 26% of the CH market value

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

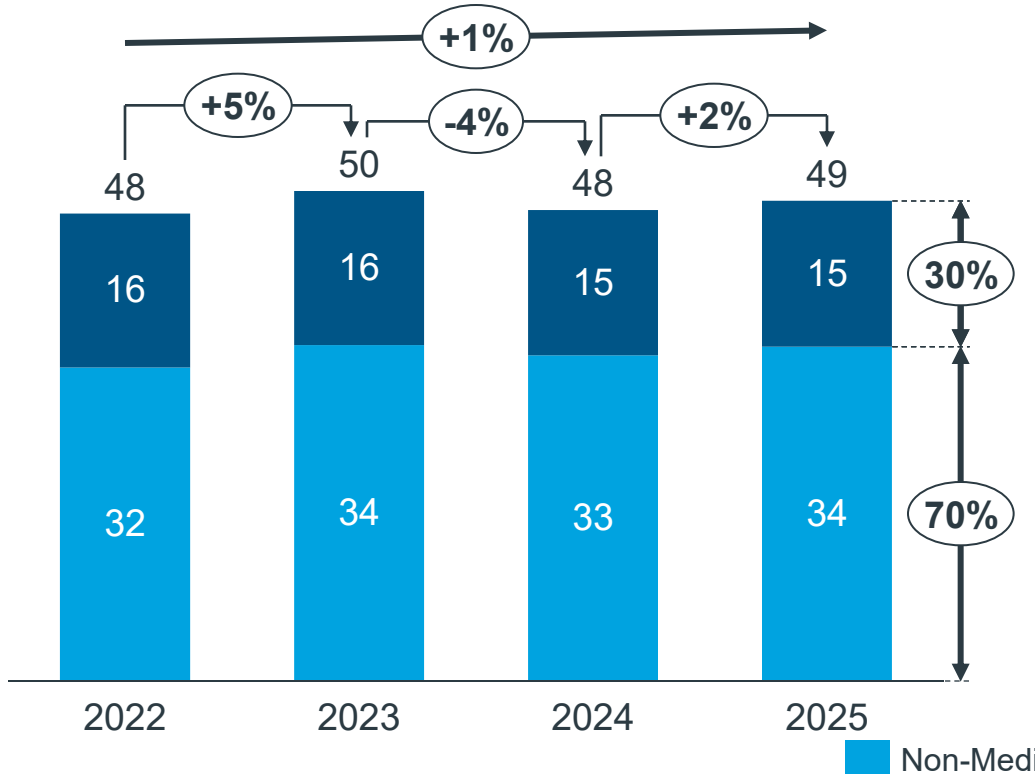


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

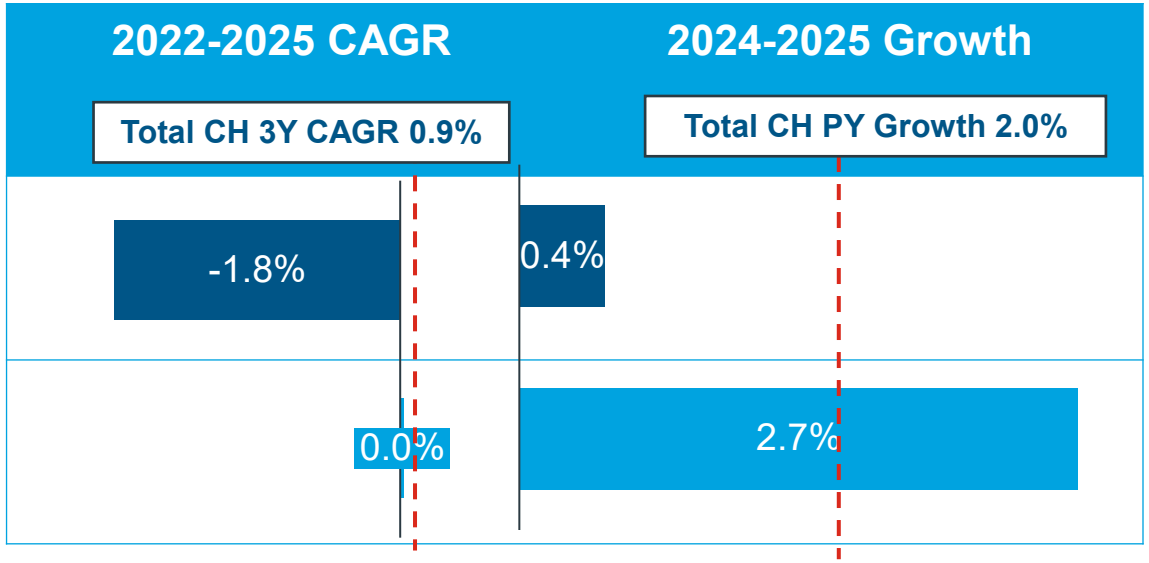
Finland CH Market Volume & Growth

Medical devices have records flat growth in volumes in thew recent year; holds 30% of the total CH market volume

Market Volume (Mn Units), and Latest Volume Share (%)



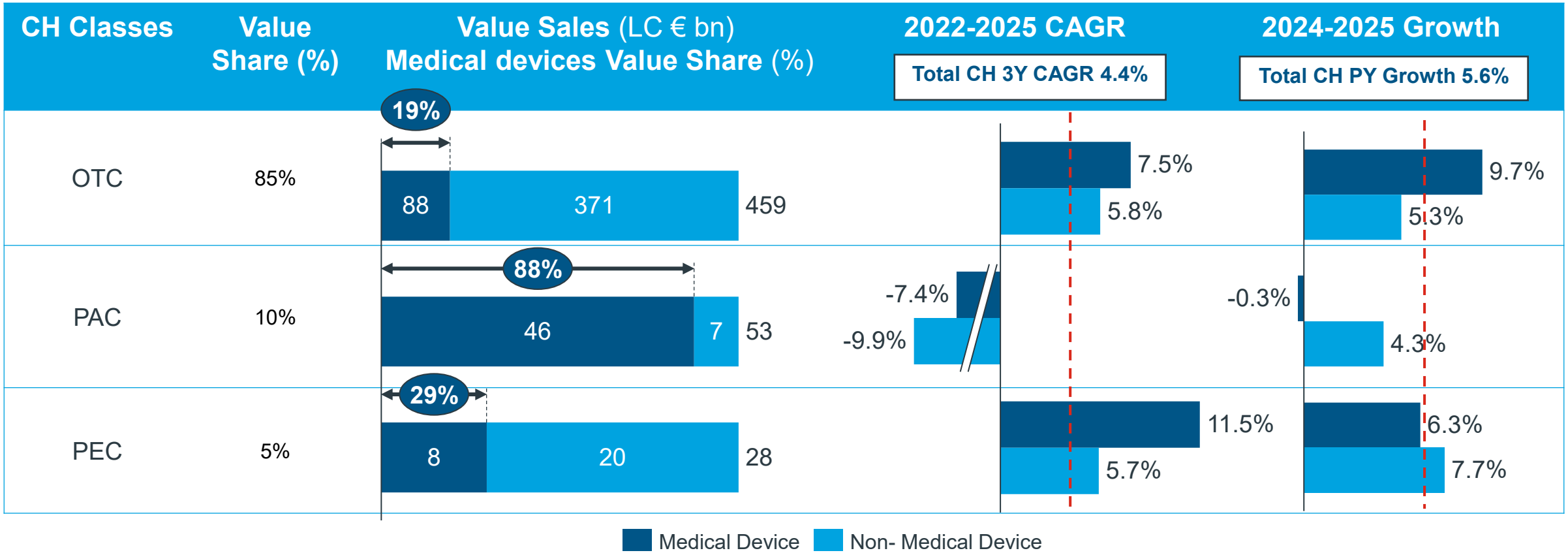
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Finland CH Performance by Classes

Patient care segment contributes the most (in % terms) to medical device values while OTC segment has the largest medical device value sales



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

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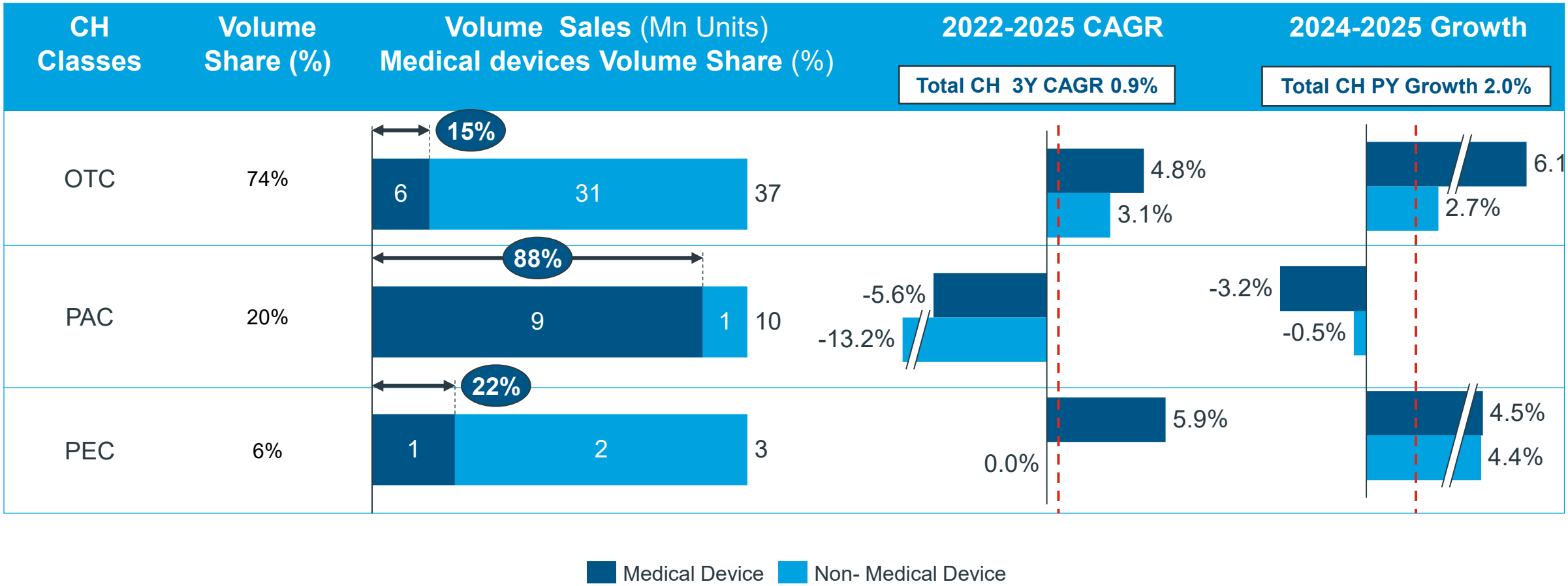
Finland CH Performance by Classes

Patient Care leads in medical device volume sales with 9Mn units



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Finland Medical Devices Packs & New Launches

Patient care accounts for most number of pack launches in the last 3 years

Category	Total Packs*			New Launches**		
CH Total	3,554	2,809	**6,363**	1,130	689	**1,819**
OTC	234	1,192	**1,426**	48	222	**270**
Patient Care	3,264	970	**4,234**	1,063	295	**1,358**
Personal Care	56	647	**703**	19	172	**191**

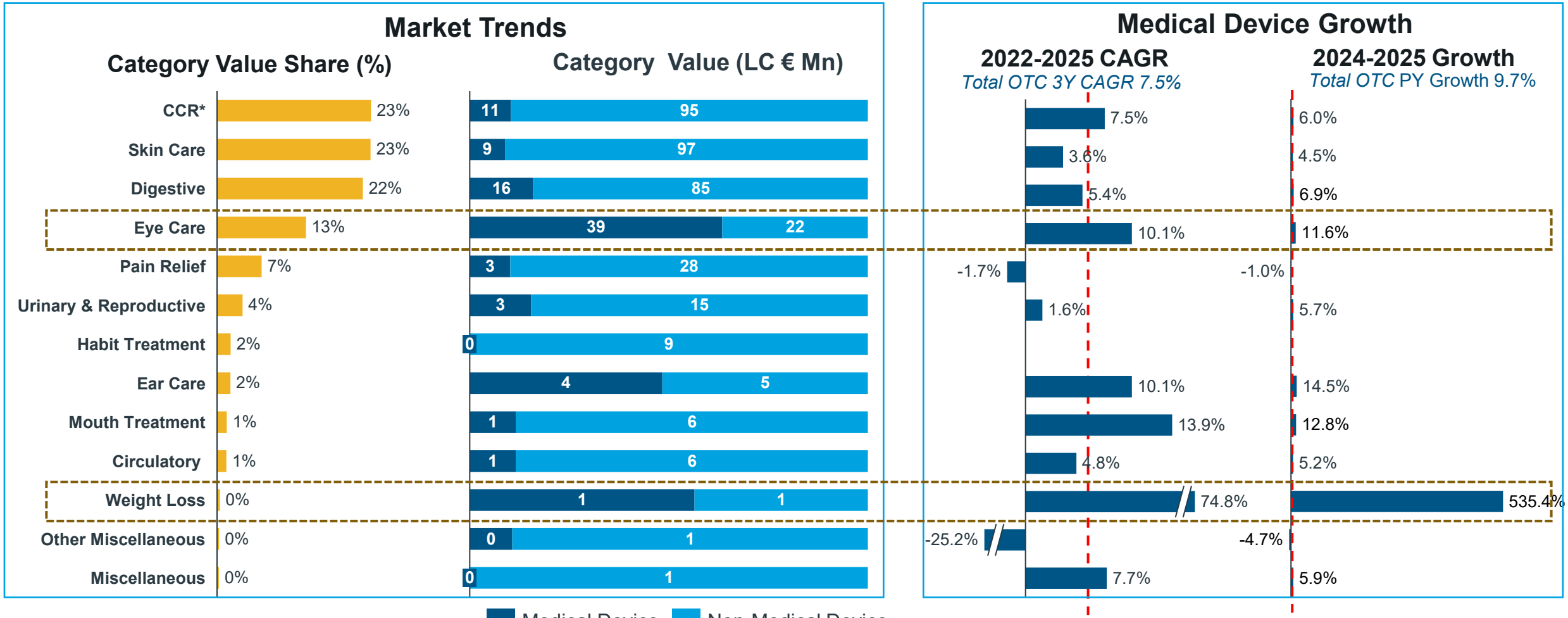
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Finland OTC Performance by CHC 1 Category in 2025

Eye care leads in medical device values; weight loss segment has seen remarkable growth

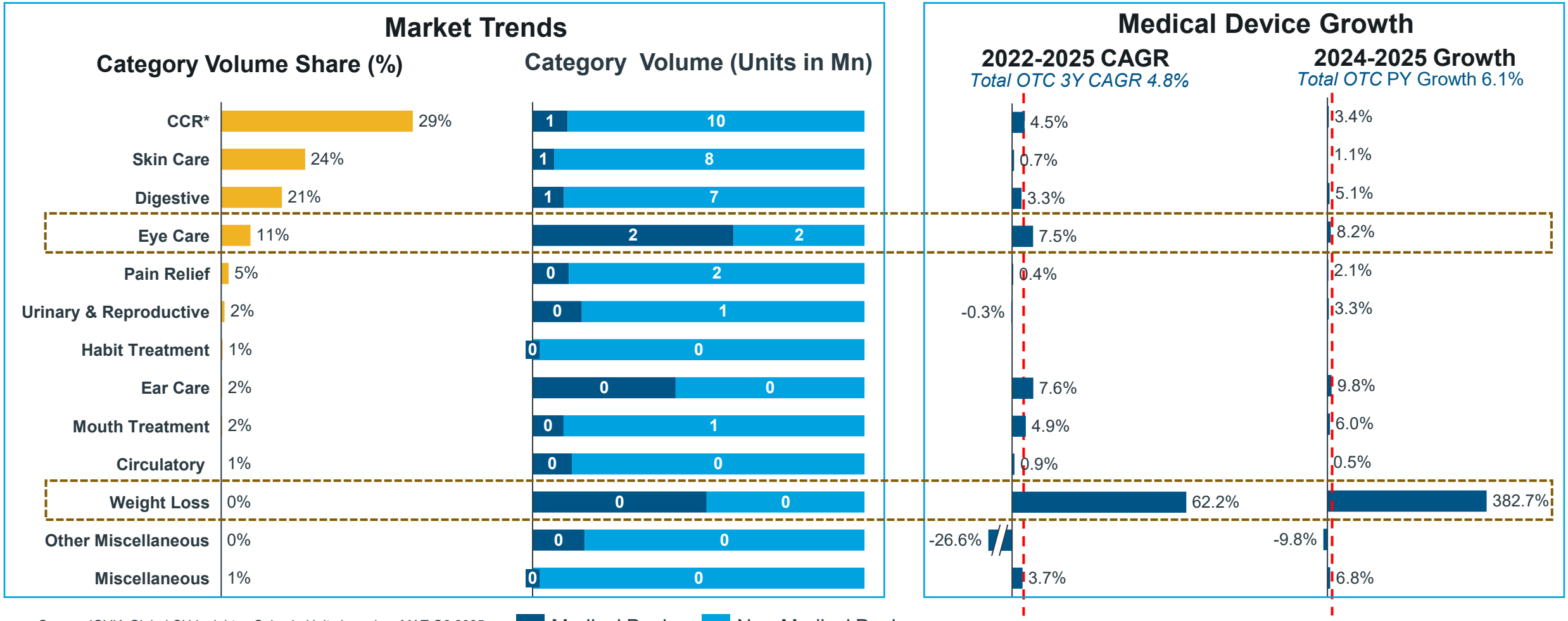


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Finland OTC Performance by CHC 1 Category in 2025

Eye care is leading in volumes as well with remarkable growth seen in weight loss segment



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Finland Medical Devices Performance by top CHC 2 Segments

Laxatives are the leading category in CHC 2 segments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**88.3**	
Eye Care	44%	38.9	Not available
Digestive	18%	16.0	Laxatives 12.2; Digestive Acid & Heartburn 1.8; Antidiarrhoeals 1.7; 0.2
CCR	12%	11.0	Sore Throat 4.2; Nasal Saline 3.9; Other Respiratory 1.7; Cough 0.7
Skin Care	11%	9.4	Skin Protector/Emollients 3.2; Wound Healing 2.4; Wart/Corn Removal 2.4; Hand Skin Wound Disinfect 0.8
Ear Care	5%	4.5	Not available
Pain Relief	4%	3.1	Muscular Pain 3.1; Mouth Pain 0.1; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Finland Medical Devices Performance by top CHC 2 Segments

Urinary and reproductive segments account for <5% of the medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Urinary & Reproductive	3%	2.7	Gynaecological 2.3; Urinary Condition 0.4; Urology Male Condition 0.0
Weight Loss	1%	1.1	Not available
Mouth Treatment	1%	0.8	Other Mouth Treatment 0.7; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.7	Antihemorrhoids 0.7; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	0%	0.2	Not available
Miscellaneous	0%	0.0	
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Finland Medical Devices Performance by top CHC 2 Segments

Sore throat and laxatives are the lead CHC 2 segments in terms of volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**5.6**	
Eye Care	42%	2.4	Not available
Digestive	13%	0.7	Laxatives 0.5; Acid & Heartburn 0.2; Digestive 0.1; Antidiarrhoeals 0.0
CCR	20%	1.1	Sore Throat 0.5; Nasal Saline 0.4; Other Respiratory 0.1; Cough 0.0
Skin Care	10%	0.6	Wound Healing 0.2; Skin Protector/Emollients 0.2; Wart/Corn Removal 0.1; Hand Skin Wound Disinfect 0.1
Ear Care	5%	0.3	Not available
Pain Relief	4%	0.2	Muscular Pain 0.2; Mouth Pain 0.0; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Finland Medical Devices Performance by top CHC 2 Segments

Skin care products account 10% of the medical device volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Urinary & Reproductive	2%	0.1	Gynaecological 0.1; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Weight Loss	1%	0.0	Not available
Mouth Treatment	1%	0.1	Other Mouth Treatment 0.1; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.0	Antihemorrhoids 0.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	0%	0.0	
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

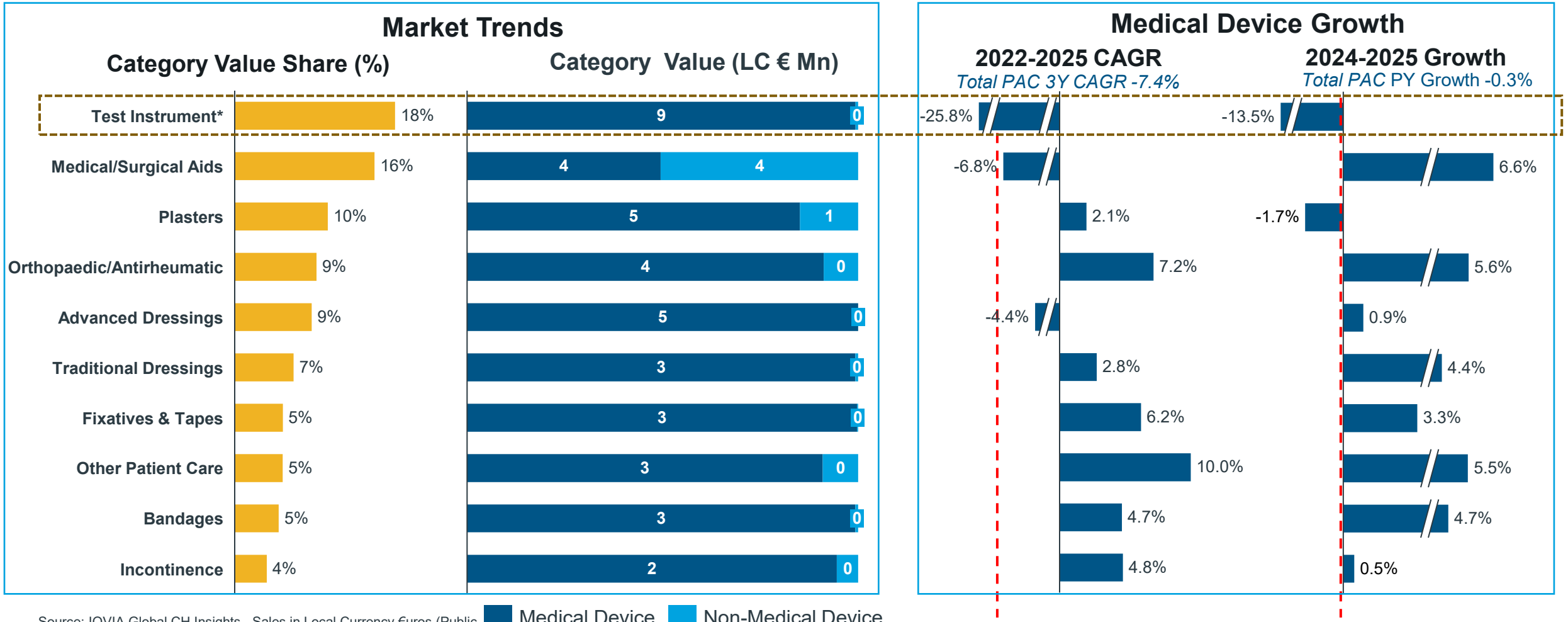
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Finland PAC Performance by CHC 1 Category in 2025 (1/2)

Test Instruments leads medical devices values with a 18% value share

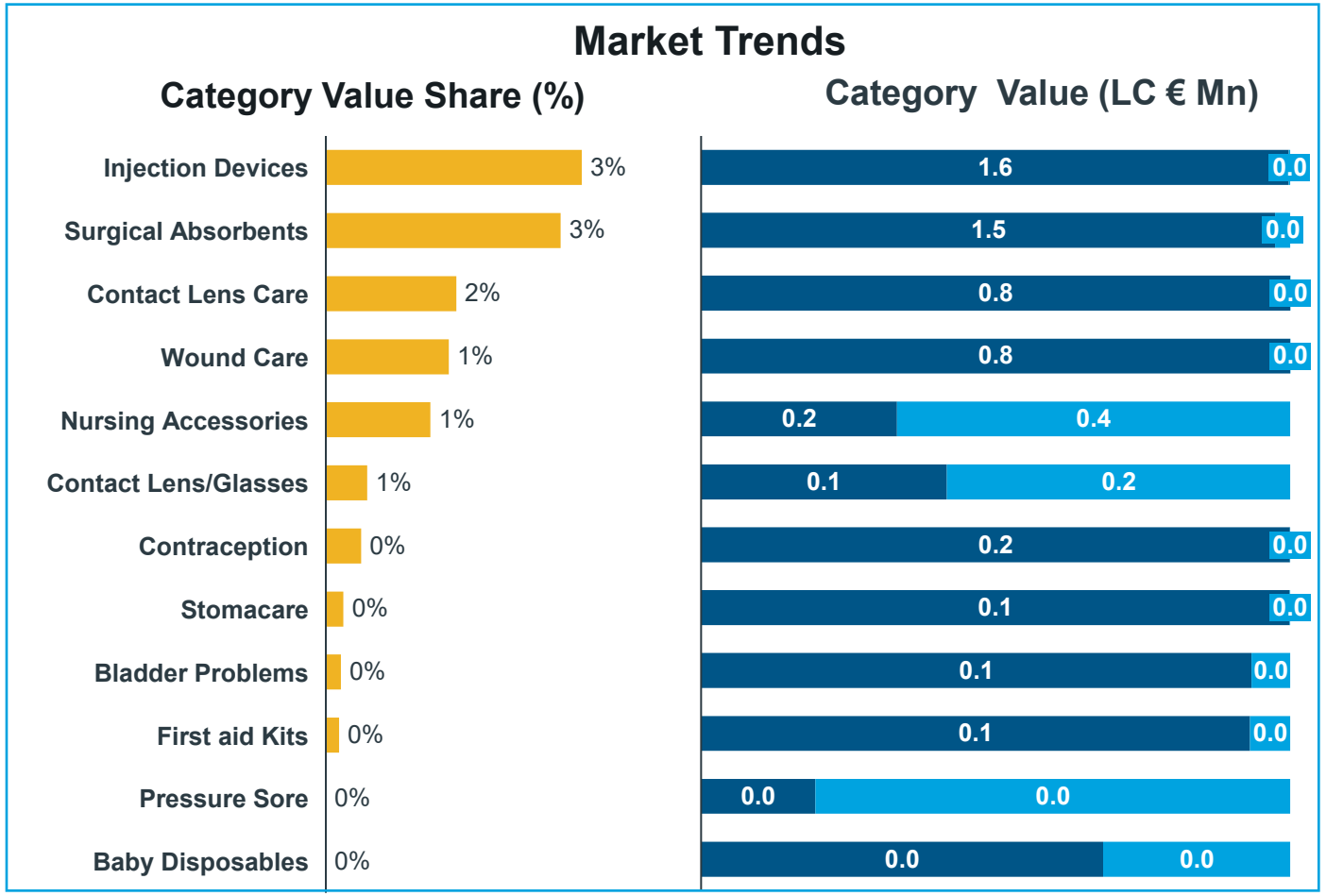


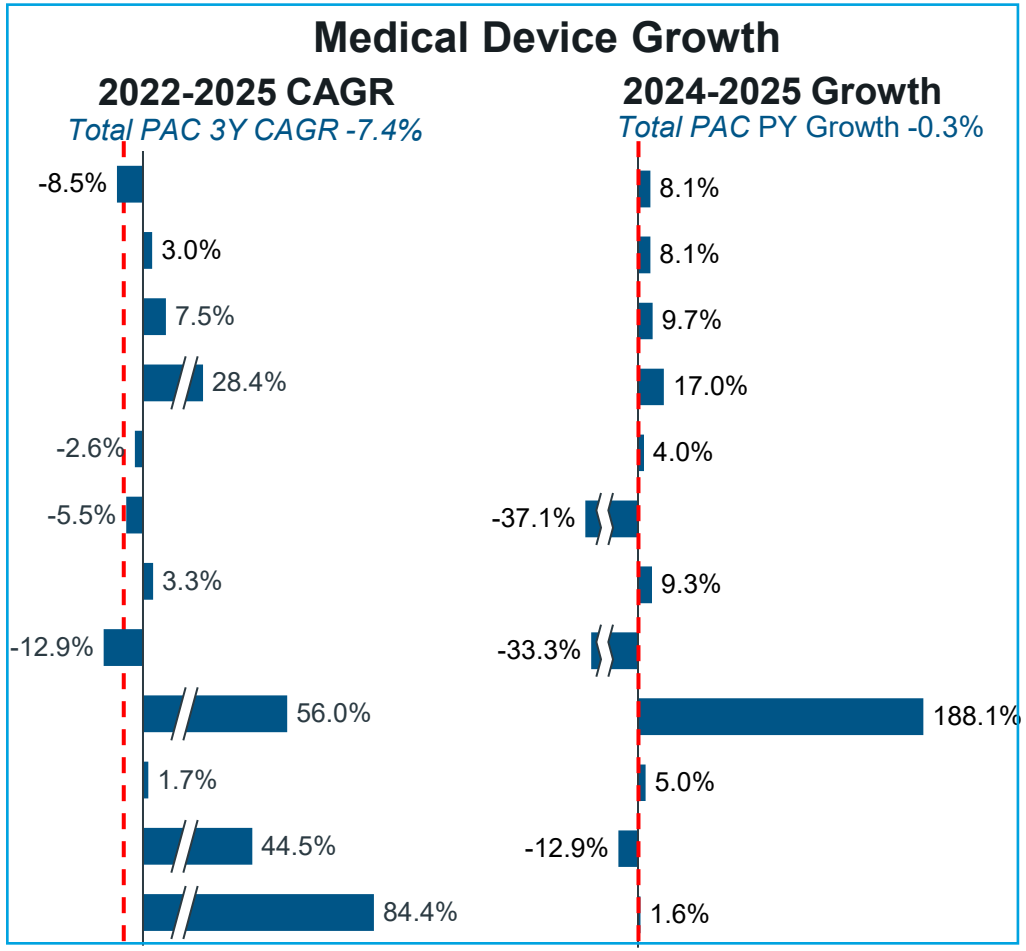
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Finland PAC Performance by CHC 1 Category in 2025 (2/2)

Smaller categories like wound care and contact lens are witnessing positive growth



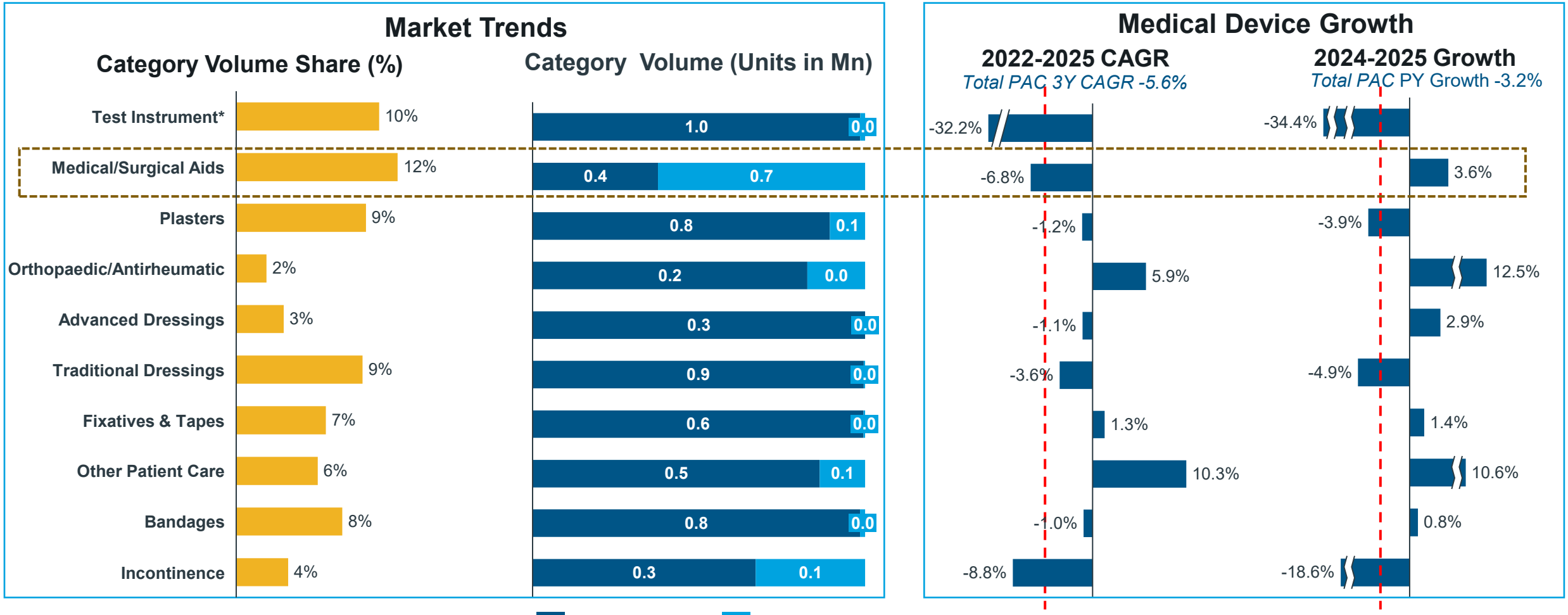


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Finland PAC Performance by CHC 1 Category (1/2)

PAC performance has declined with only few categories witnessing a positive growth

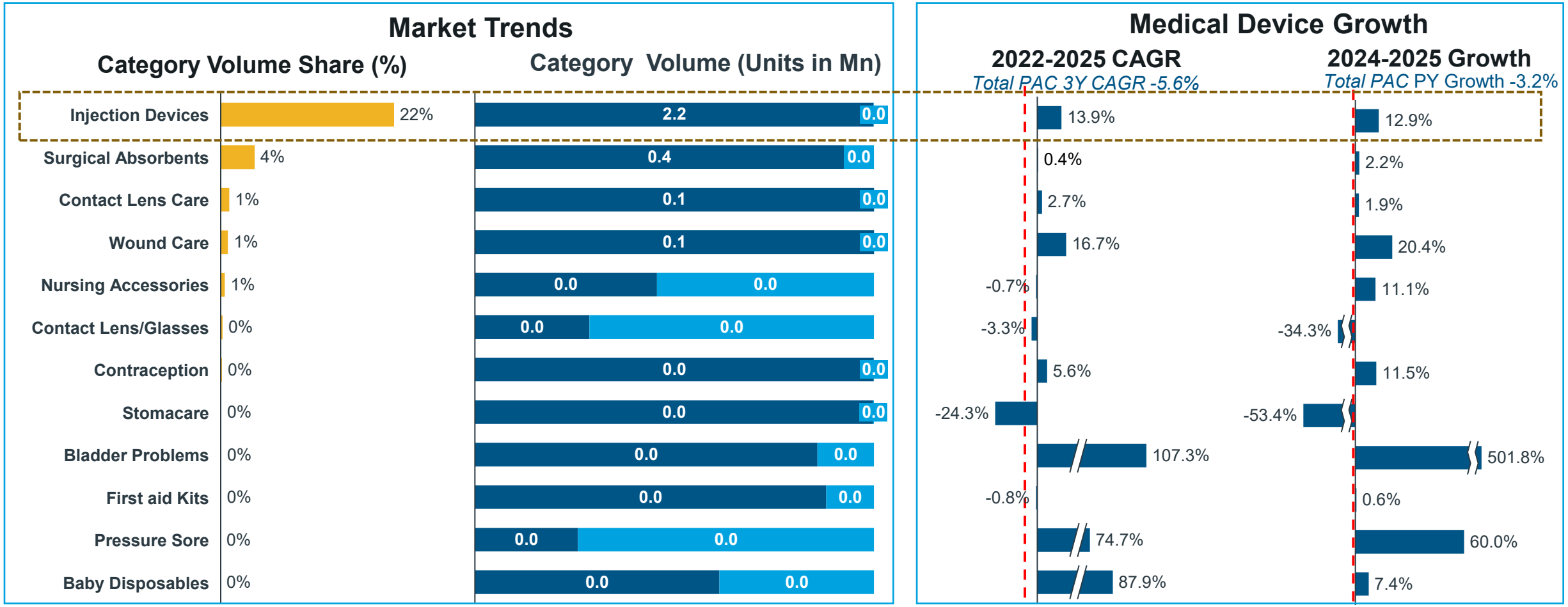


Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Finland PAC Performance by CHC 1 Category (2/2)

Injection devices account for the highest volume share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Finland Medical Devices Performance by top CHC 2 Segments

PAC value share is currently led by thermometers in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**46.1**	
Test Instrument	20%	9.5	Thermometers 2.4; Coronavirus Test 2.3; Blood Press Monitors 1.3; Pregnancy Test 1.2
Plasters	10%	4.7	Special Plaster 2.6; Plaster Strip 1.7; Liquid Plaster 0.3; Plaster Spec. Uses 0.1
Advanced Dressings	10%	4.6	Base Tech 2.5; Anti-Infection 2.0; Other 0.0; Hyaluron 0.1
Orthopaedic/ Antirheumatic	10%	4.4	Belts Other Supp 2.2; Curativ/Elastic Stocking 1.0; Clogs+Orthopaedic Footwear 0.9; Equiment for Disabled 0.2
Medical/ Surgical Aids	9%	4.1	Inhalation & Aerosol 2.2; Miscellaneous 0.8; Gloves 0.5; Hot & Cold Packs 0.4
Traditional Dressings	8%	3.5	Not available

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Finland Medical Devices Performance by top CHC 2 Segments

Coronavirus test is the leading category in test instruments segment

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**8.7**	
Test Instrument	12%	1.0	Coronavirus Test 0.5; Thermometers 0.3; Pregnancy Test 0.1; Oth Diagnostic Tests 0.0
Plasters	10%	0.8	Plaster Strip 0.4; Special Plaster 0.3; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Advanced Dressings	4%	0.3	Base Tech 0.2; Anti-Infection 0.1; Other 0.0; Hyaluron 0.0
Orthopaedic/ Antirheumatic	2%	0.2	Belts Other Supp 0.1; Curativ/Elastic Stocking 0.0; Clogs+Orthopaedic Footwear 0.0; Equiment for Disabled 0.0
Medical/ Surgical Aids	5%	0.4	Miscellaneous 0.1; Hot & Cold Packs 0.1; Inhalation & Aerosol 0.1; Gloves 0.1
Traditional Dressings	10%	0.9	Not available

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

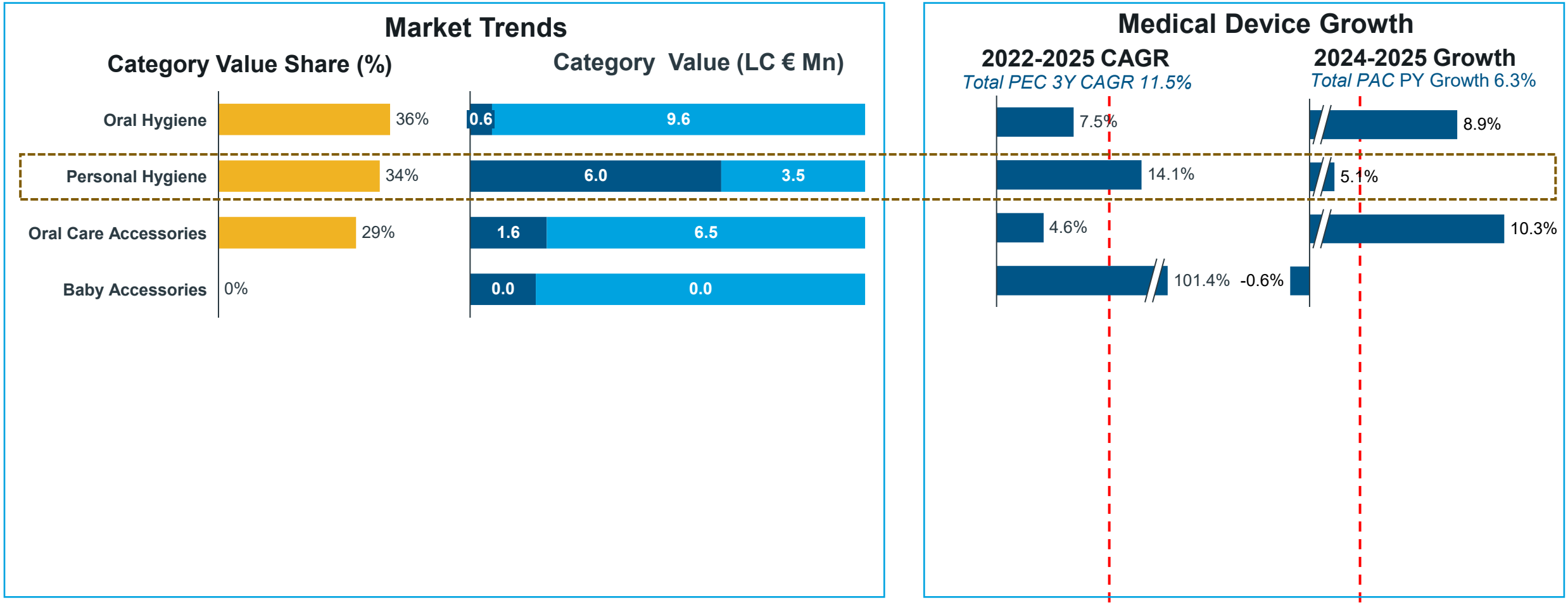
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Finland PEC Performance by CHC 1 Category

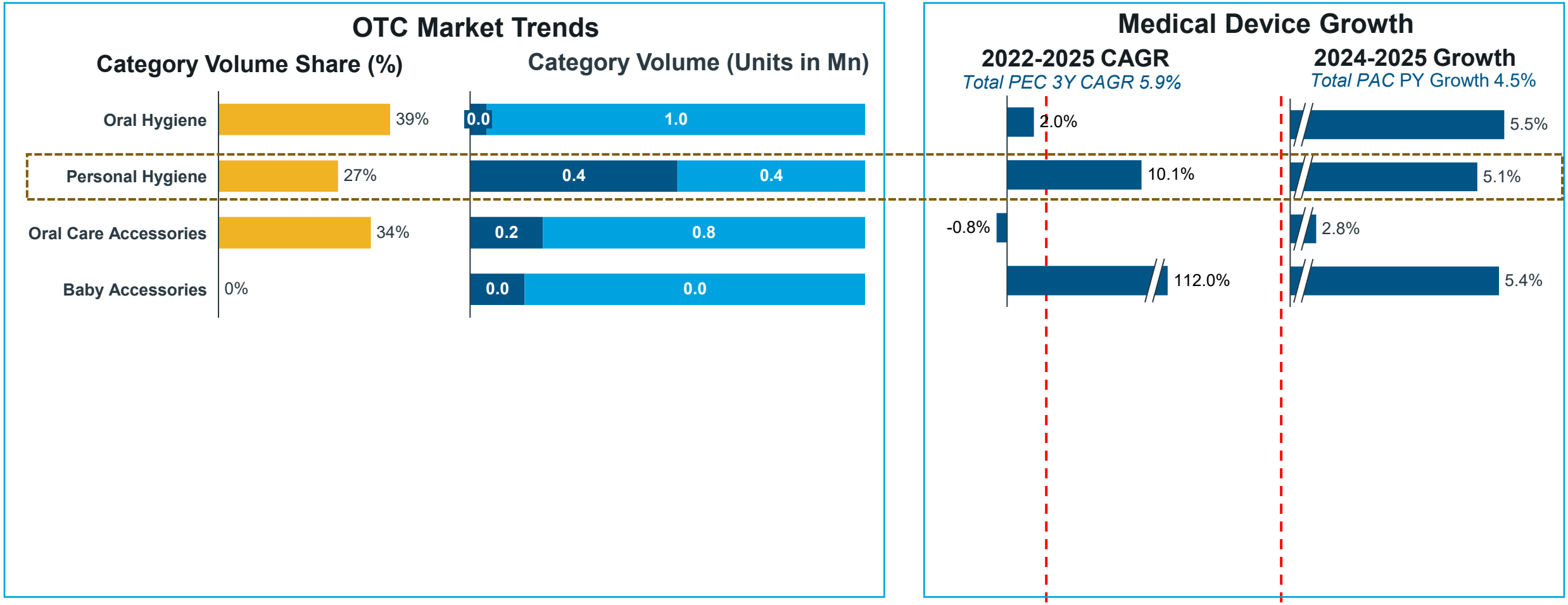
*Personal hygiene leads in sales at **€6Mn**, outperforming L-T growth benchmarks*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Finland PEC Performance by CHC 1 Category

Personal hygiene dominates medical device volumes, showing significant growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Finland Medical Devices Performance by top CHC 2 Segments

Personal hygiene accounts for 74% of the medical device values led by intimate hygiene segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**8.2**	
Personal Hygiene	74%	6.0	Intimate Hygiene 6.0; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	19%	1.6	Denture Products 1.4; Other Oral Care Acces. 0.2; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	7%	0.6	Toothpastes 0.5; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Finland Medical Devices Performance by top CHC 2 Segments

Intimate hygiene leads in volume as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.6**	
Personal Hygiene	64%	0.4	Intimate Hygiene 0.4; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	29%	0.2	Denture Products 0.2; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	7%	0.0	Toothpastes 0.0; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0; Feeding Bottles &Acces. 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Croatia Medical Devices – Market Dynamics

Croatia Medical Devices Performance Overview

Medical devices has remained stagnant with PAC showing the highest market penetration

39%

Medical device share of total CH value in 2025

Long –term Growth

12.5% by value

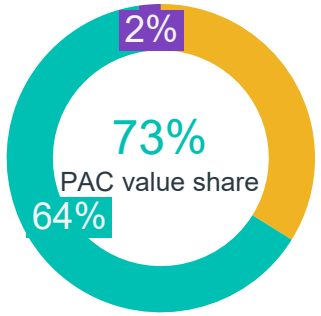
3.7% by volume

Short –term Growth

13.5% by value

4.8% by volume

Medical Devices – €142 Mn (2025)



Long-term Growth (Value)

10.7% PAC

16.1% OTC

16.5% PEC

Medical Devices Categories

43%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **75%** of new pack launches

Medical Devices Innovation

Test Instruments

49% Share of total PAC values in 2025; Dominated by **Gluc Measuring**

Long-term Growth

25.1% by value

PAC (Patient care)

CCR

36% *Share for total OTC value in 2025, Dominated by **Nasal saline***

Long-term Growth

12.3% by value

OTC (Over-the-Counter)

Oral Care Accessories

63% *Share of total PEC value share in 2025; Dominated by **Denture products***

Long term Growth

15.4% by value

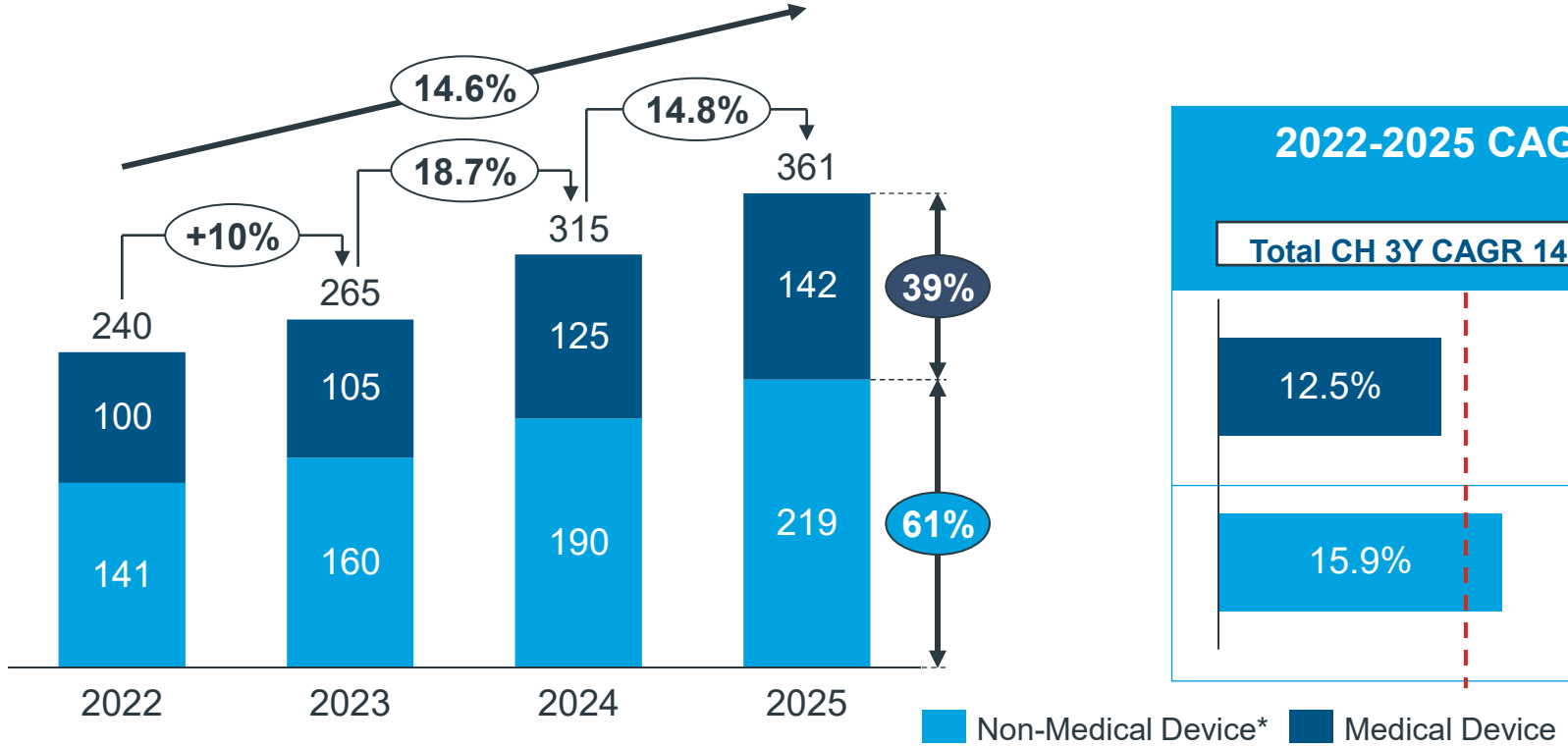
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

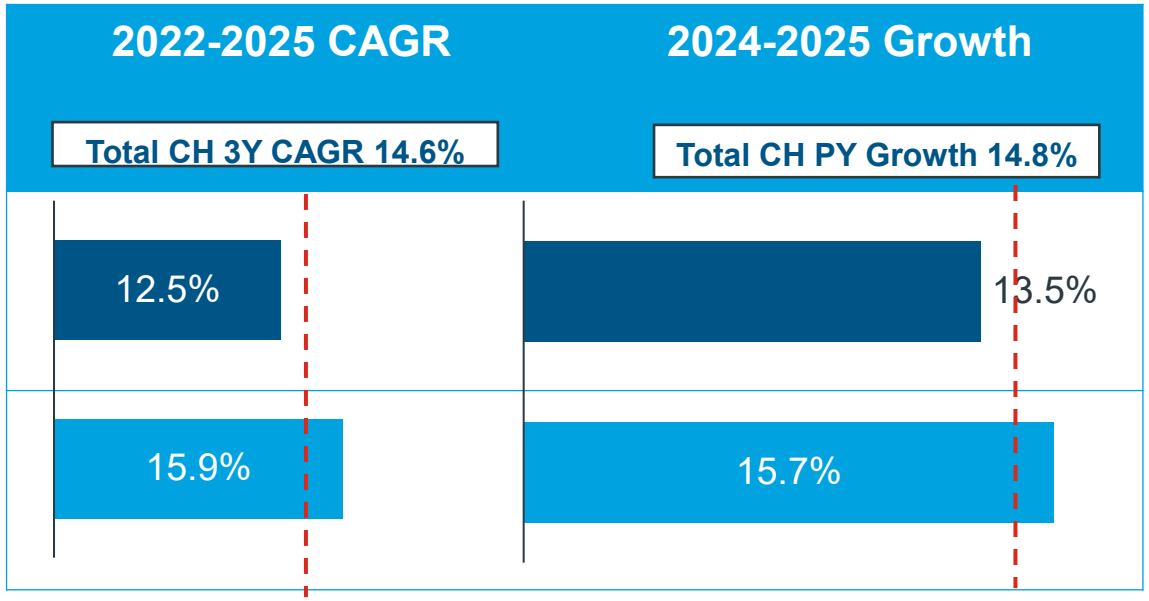
Croatia CH Market Size & Growth

The CH market has grown at a CAGR of 14.6% between 2022 and 2025, with the medical devices segment comprising of about 39% of total CH value shares

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

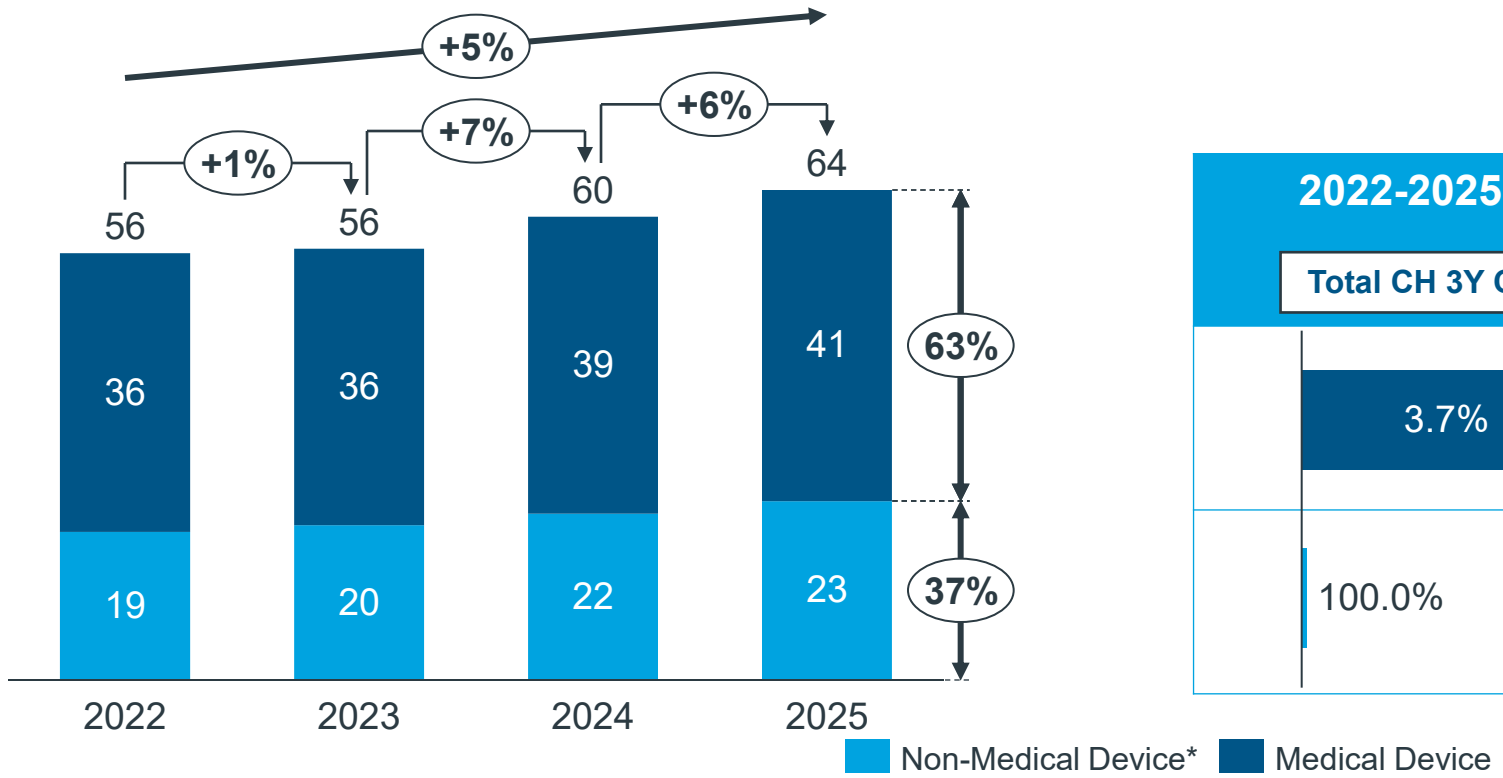


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

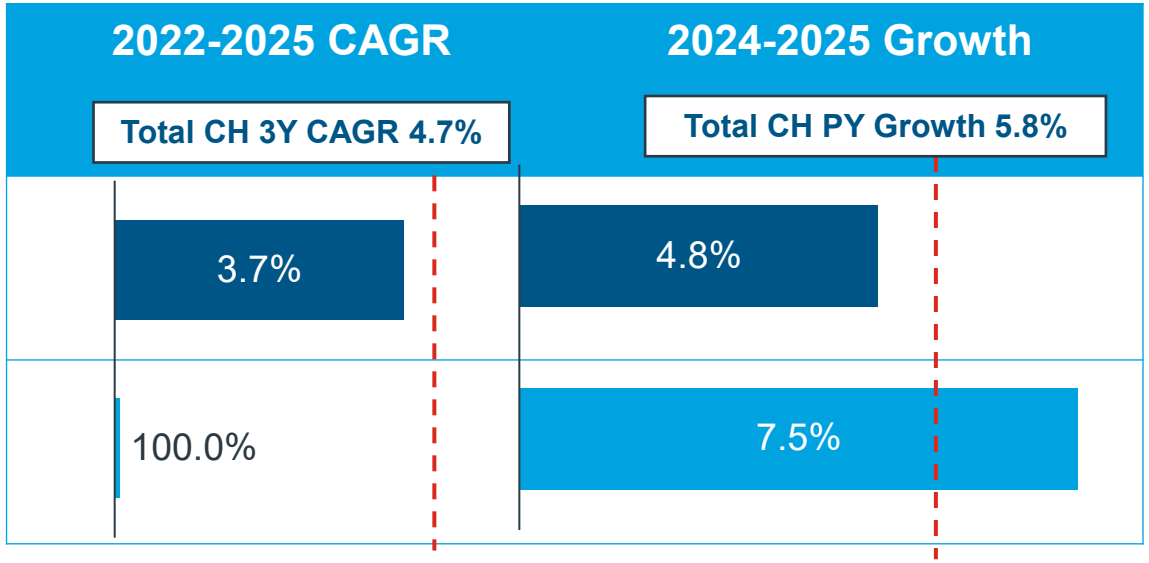
Croatia CH Market Volume & Growth

Medical devices account for 63% of the CH market volume, while showing positive trend both in L-T and S-T

Market Volume (Mn Units), and Latest Volume Share (%)



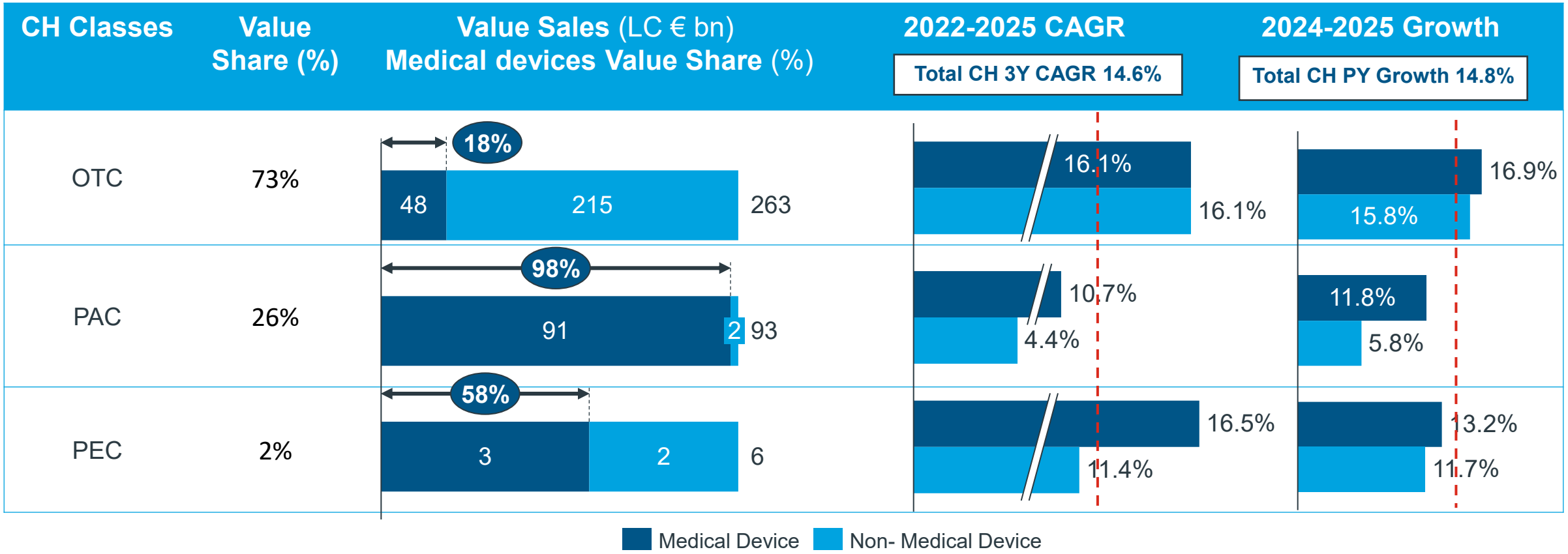
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Croatia CH Performance by Classes

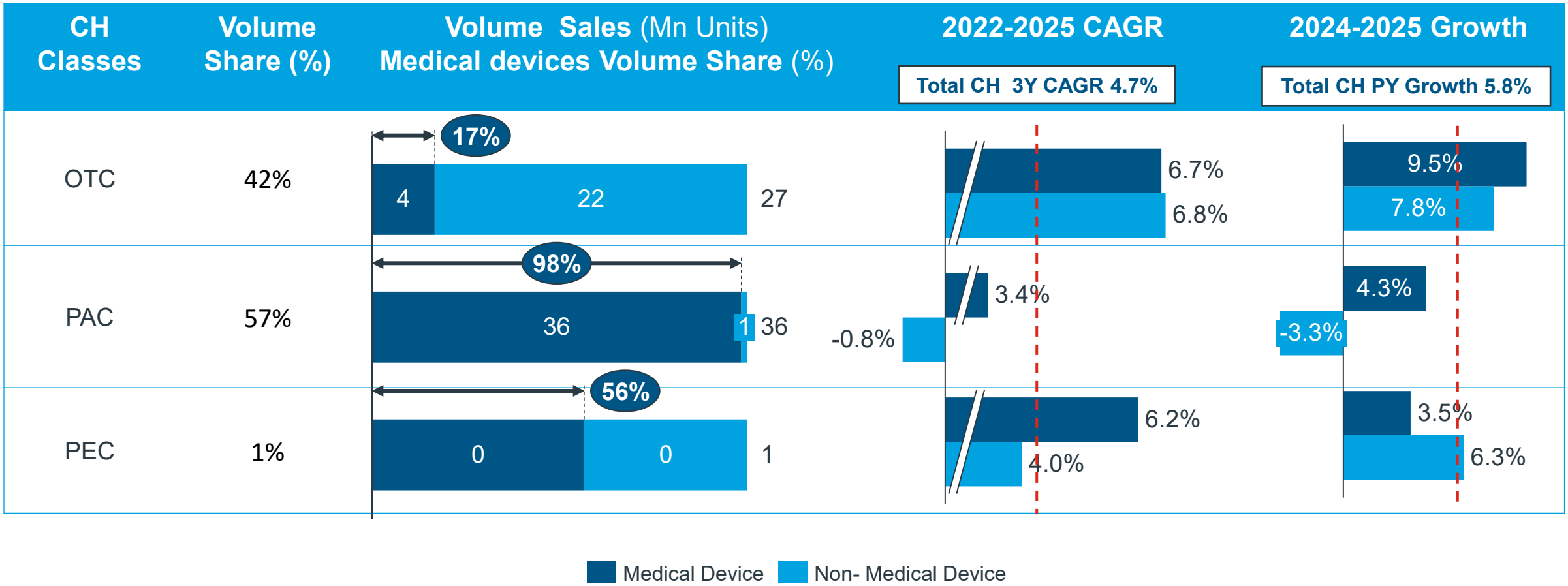
*PAC leads with **€91 Mn** in medical device sales and positive growth*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Croatia CH Performance by Classes

PAC leads in medical device volume sales with 36 Mn units and holds the highest medical device volume share (98%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Croatia Medical Devices Packs & New Launches

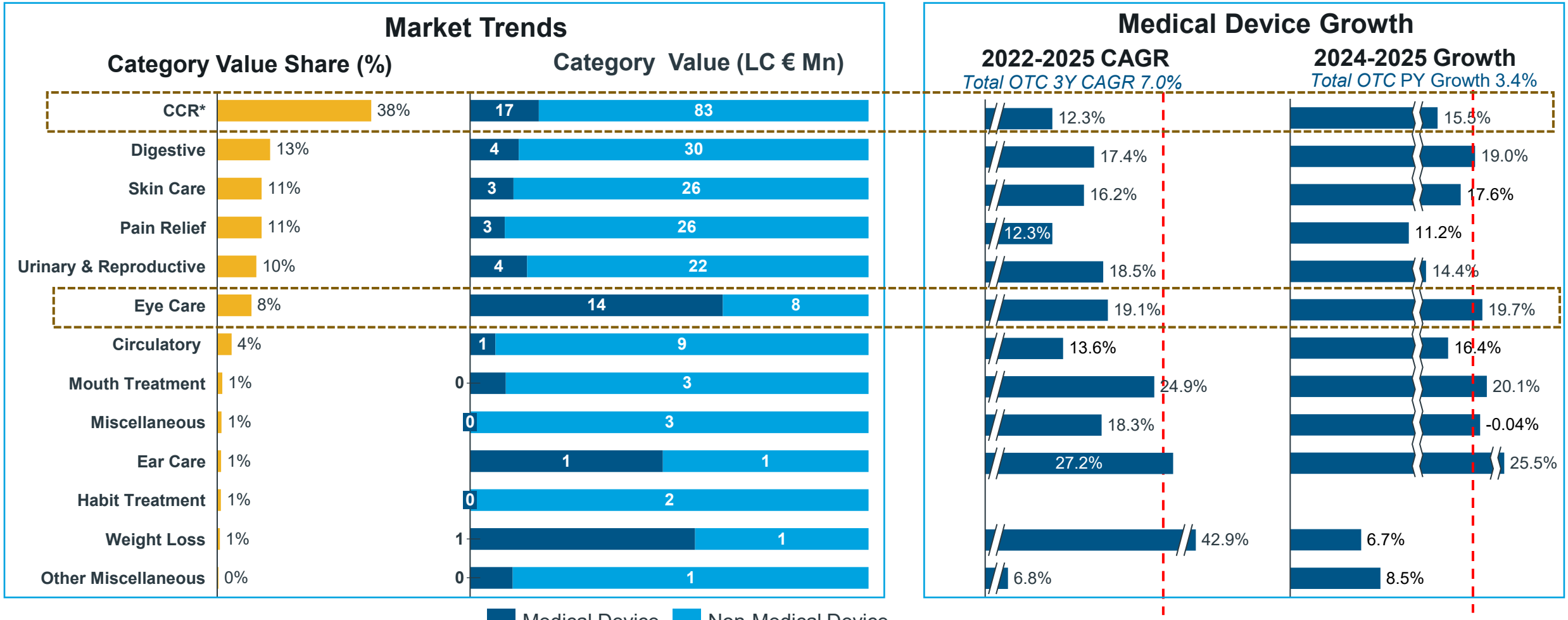
The majority of the Medical devices new launches come from Patient Care category in last 3 years

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	2,636	2,503	**5,139**	529	693	**1,222**
OTC	422	2,007	**2,429**	111	609	**720**
Patient Care	2,154	169	**2,323**	399	23	**422**
Personal Care	60	327	**387**	19	61	**80**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Croatia OTC Performance by CHC 1 Category in 2025

CCR leads in both overall values in CH market as well as medical devices values, followed by Eye care

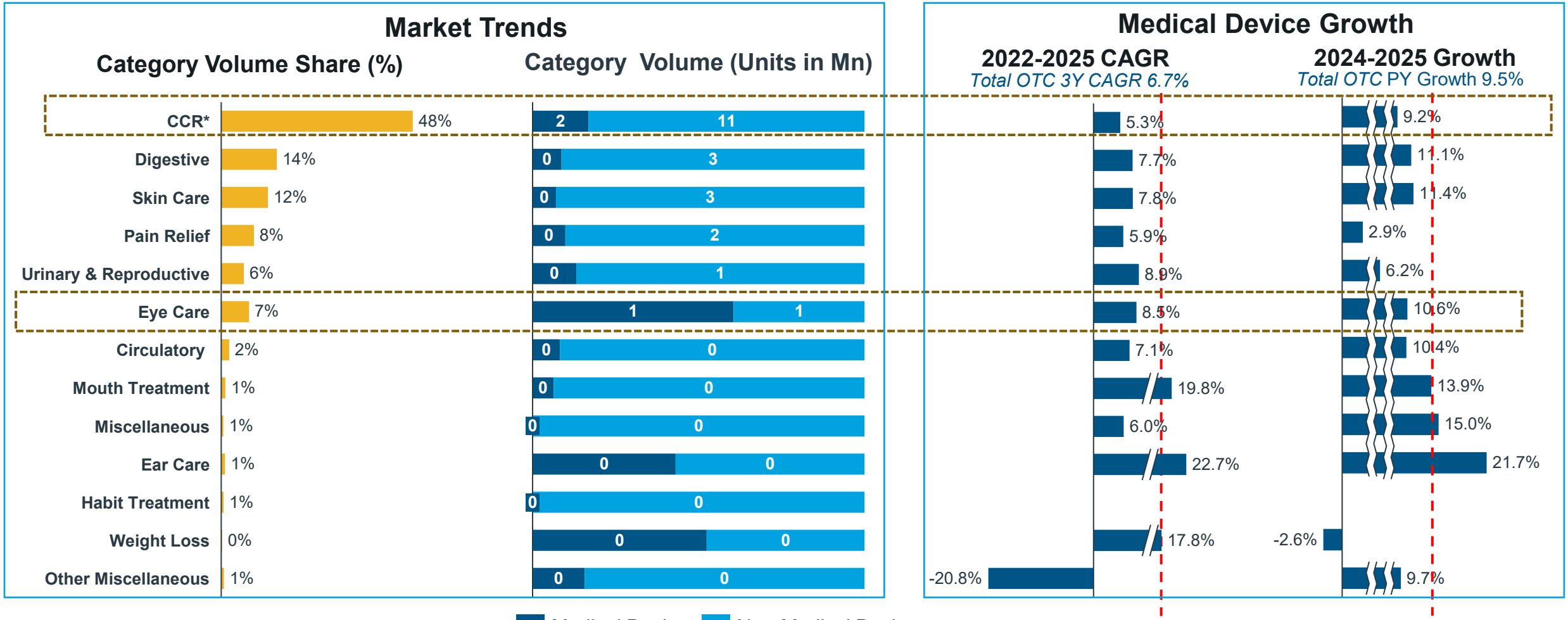


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Croatia OTC Performance by CHC 1 Category in 2025

CCR holds the highest medical device volume share, followed by Eye Care



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Croatia Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 90% of values; led by nasal saline in CCR product segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**48.0**	
CCR	36%	17.3	Nasal Saline 9.1; Sore Throat 6.3; Cough 0.9; Cold Remedies 0.5
Eye Care	29%	14.1	Not Available
Digestive	9%	4.2	Laxatives 2.6; Digestive 0.9; Acid & Heartburn 0.5; Antidiarrhoeals 0.1
Urinary & Reproductive	8%	3.6	Gynaecological 2.1; Urinary Condition 1.4; Urology 0.1; Male Condition 0.0
Skin Care	7%	3.1	Hand Skin Wound Disinfect 0.8; Wart/Corn Removal 0.7; Wound Healing 0.6; Scar & Keloid 0.5
Pain Relief	5%	2.5	Muscular Pain 2.3; Mouth Pain 0.2; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Croatia Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	1.2	Not available
Weight Loss	2%	0.9	Not available
Circulatory	1%	0.6	Antihemorrhoids 0.5; Chloesterol Regulating 0.0; Other Circulatory 0.1
Mouth Treatment	1%	0.3	Other Mouth Treatment 0.3; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Other Habit 0.0; Anti Alcohol 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Croatia Medical Devices Performance by top CHC 2 Segments

Top 6 categories make up >90% of total medical devices sales volume as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**4.5**	
CCR	48%	2.2	Nasal Saline 1.0; Sore Throat 1.0; Cough 0.1; Cold Remedies 0.0
Eye Care	25%	1.1	Not available
Digestive	7%	0.3	Laxatives 0.2; Acid & Heartburn 0.1; Digestive 0.1; Antidiarrhoeals 0.0
Urinary & Reproductive	4%	0.2	Gynaecological 0.1; Urinary Condition 0.1; Urology 0.0; Male Condition 0.0
Skin Care	5%	0.2	Wound Healing 0.1; Hand Skin Wound Disinfect 0.1; Wart/Corn Removal 0.0; Scar & Keloid 0.0
Pain Relief	5%	0.1	Muscular Pain 0.2; Mouth Pain 0.0; Dysmenorrhea 0.0; Joint Care 0.0

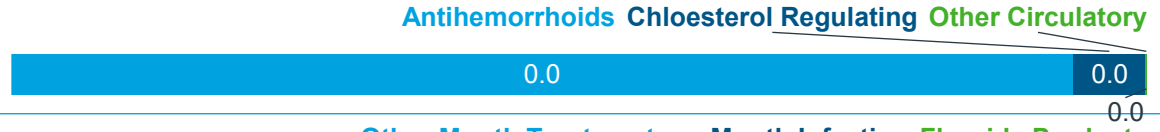
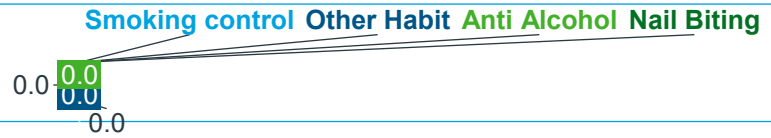
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Croatia Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	2%	0.1	Not available
Weight Loss	1%	0.0	Not available
Circulatory	1%	0.0	
Mouth Treatment	0%	0.0	
Other Miscellaneous	1%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	

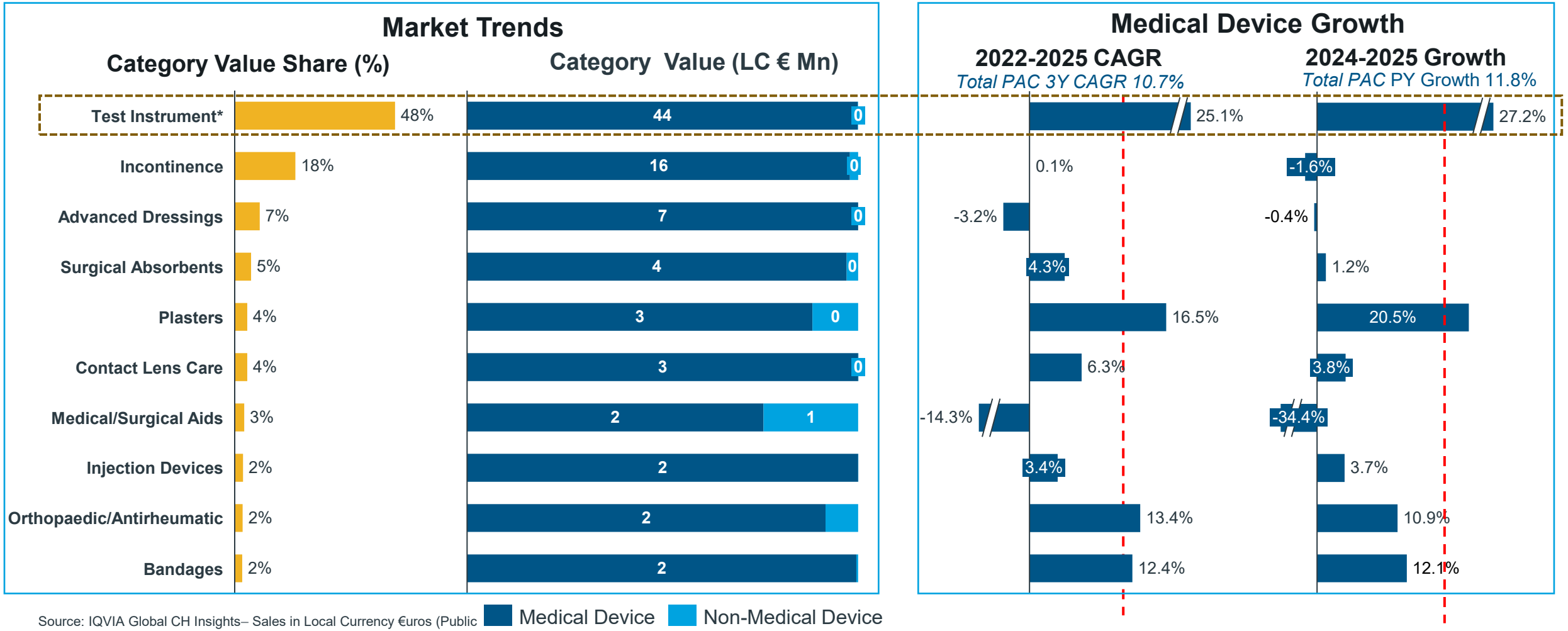
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Croatia PAC Performance by CHC 1 Category in 2025 (1/2)

*Test Instruments leads medical devices values with **€44 Mn** sales*



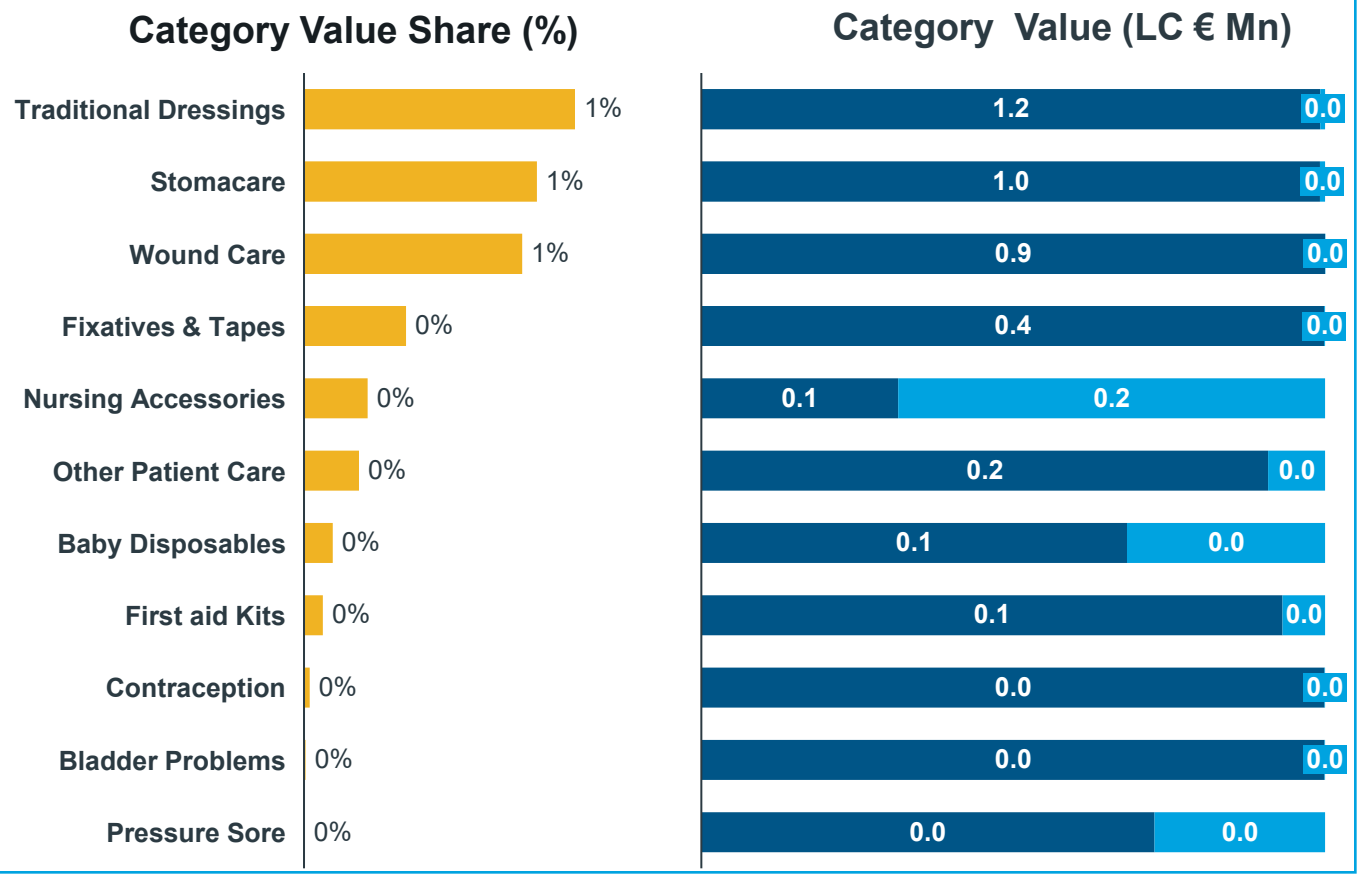
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

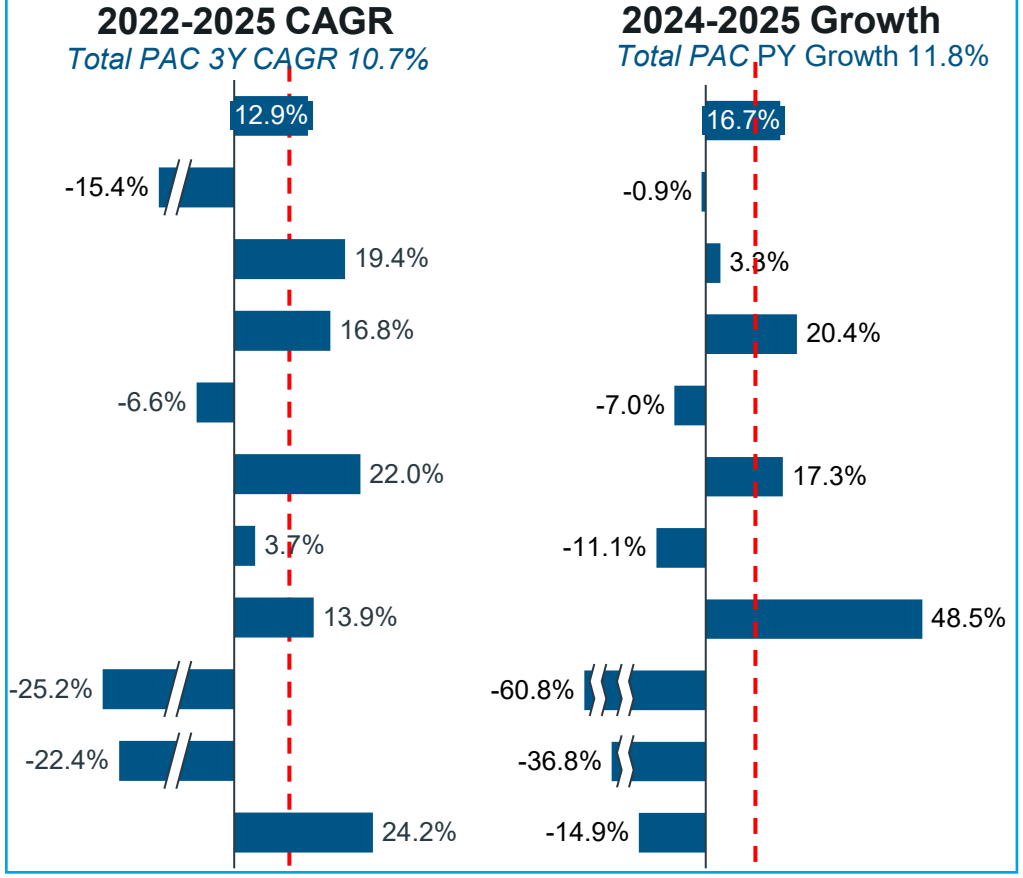
Croatia PAC Performance by CHC 1 Category in 2025 (2/2)

Categories like fixatives & tapes and first aid kits show promising value growth both L-T and S-T

Market Trends



Medical Device Growth



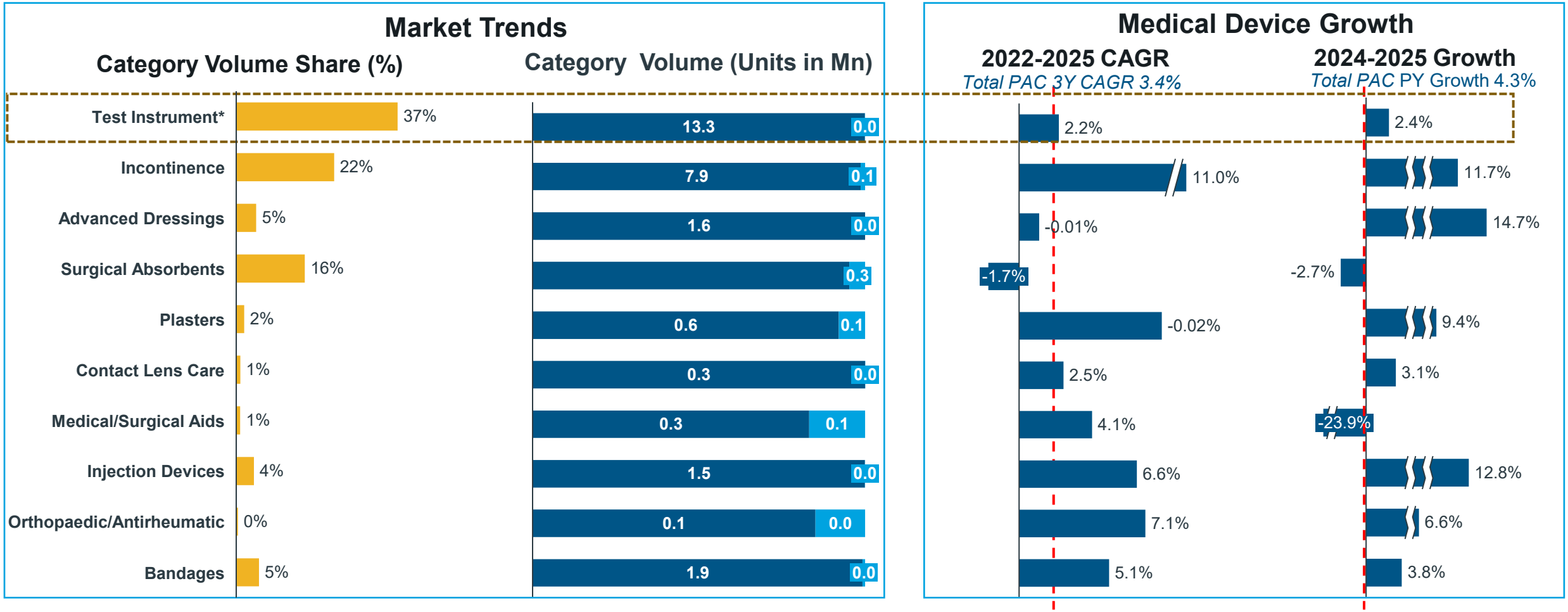
Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Croatia PAC Performance by CHC 1 Category (1/2)

Test Instruments hold the highest volume share of medical devices as well

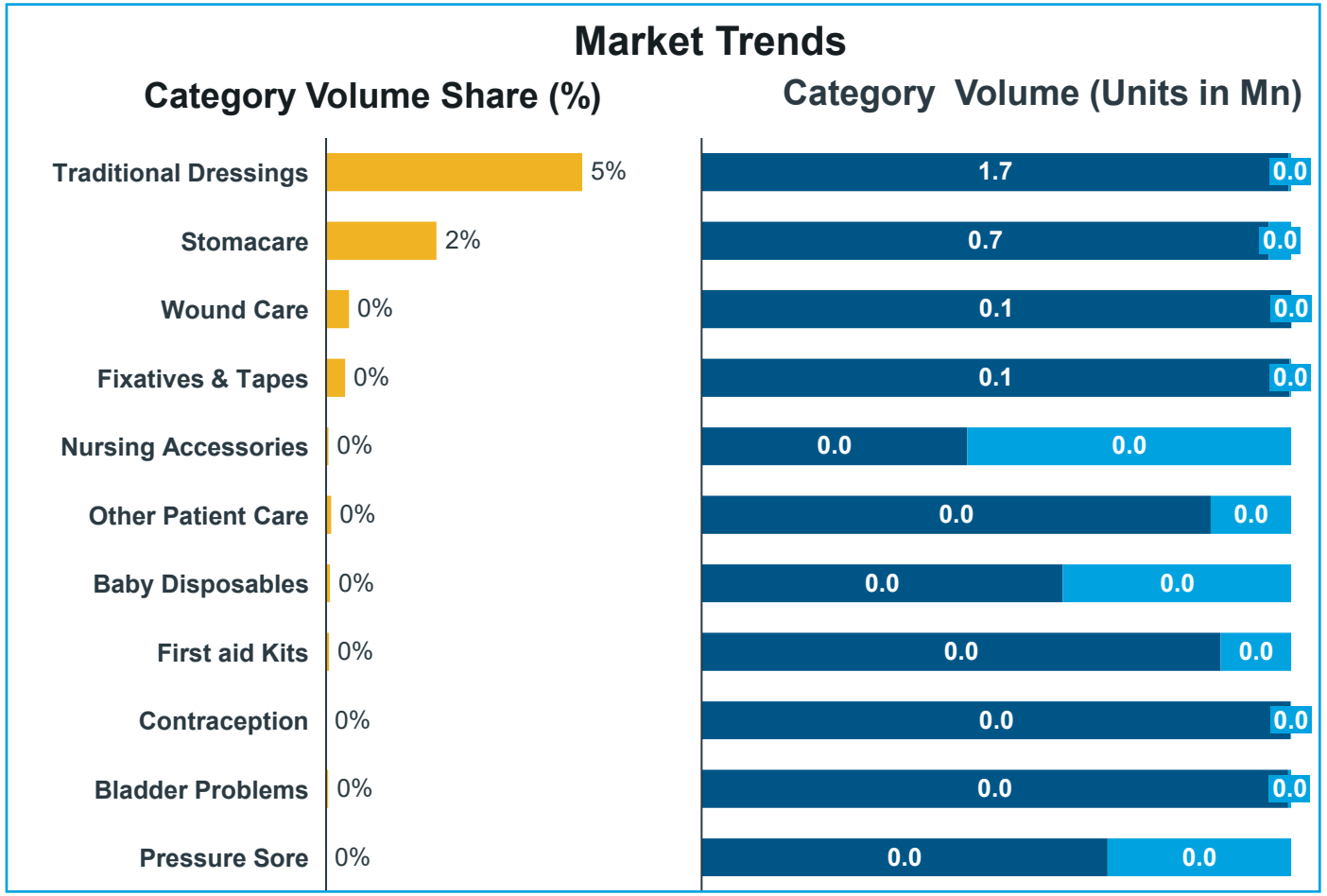


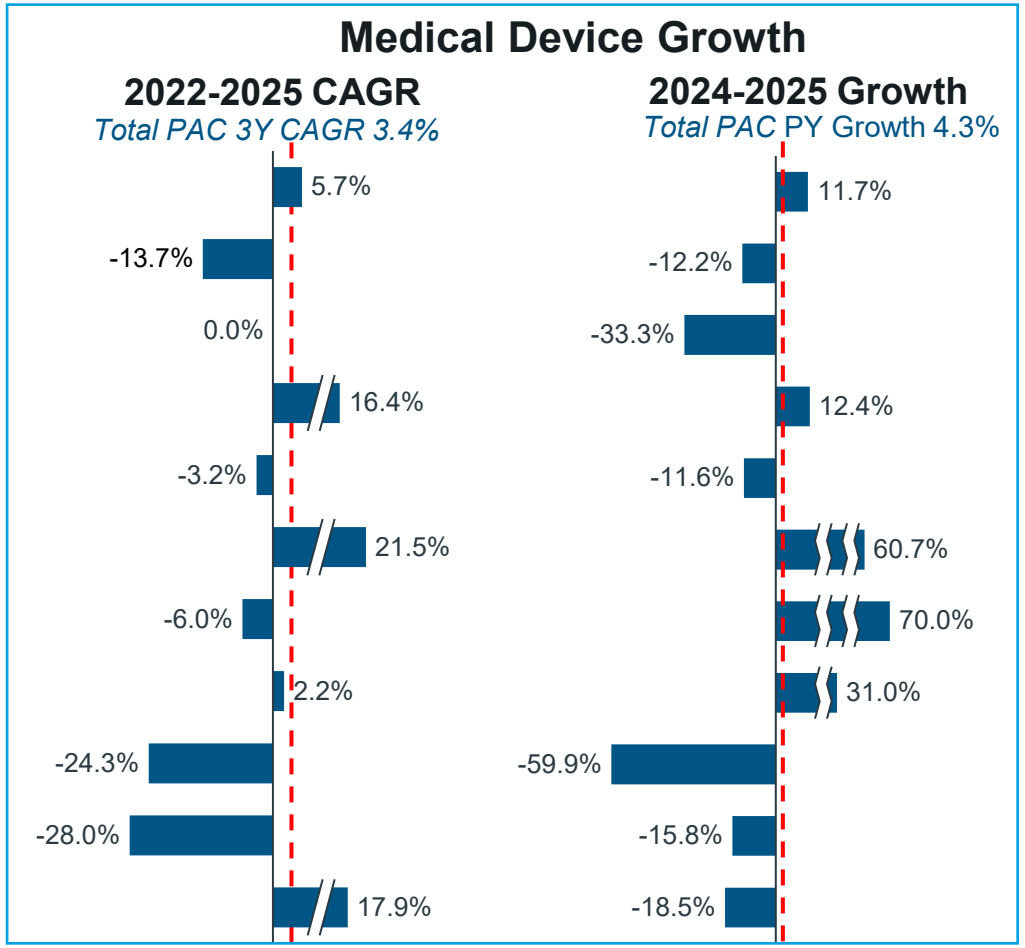
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Croatia PAC Performance by CHC 1 Category (2/2)

Categories like Other patient care and baby disposables show a positive growth S-T trend





Medical Device | Non-Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Croatia Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 85% of values; dominated by Gluc measuring in test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**90.5**	
Test Instrument	49%	44.1	Gluc Measuring 35.4; Blood Press Monitors 2.7; Thermometers 2.4; Pregnancy Test 1.9
Incontinence	18%	16.3	Mod Heav Sev Incont. 13.5; Light Incontinence 2.0; Bed Sheets/Pads 0.8; Other Incontinence Prds 0.0
Advanced Dressings	8%	6.9	Anti-Infection 4.4; Base Tech 1.3; Hyaluron 1.2; Other 0.0
Surgical Absorbents	5%	4.4	Swabs & Pads 2.6; Packs & Patches 1.6; Cotton wool 0.1
Contact Lens Care	4%	3.4	Soft Contact Lens Care 2.7; Hard Contact Lens Care 0.5; All Contact Lens Care 0.3
Plasters	3%	3.0	Plaster Strip 1.5; Special Plaster 1.3; Liquid Plaster 0.2; Plaster Spec. Uses 0.1

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Croatia Medical Devices Performance by top CHC 2 Segments

Lancets and Sampling under Test Instrument lead in medical device volumes

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**35.6**	
Test Instrument	37%	13.3	Lancets+Sampling 9.3; Gluc Measuring 3.4; Pregnancy Test 0.3; Thermometers 0.2
Incontinence	22%	7.9	Mod Heav Sev Incont. 7.3; Light Incontinence 0.4; Bed Sheets/Pads 0.2; Other Incontinence Prds 0.0
Advanced Dressings	5%	1.6	Base Tech 1.2; Anti-Infection 0.3; Hyaluron 0.1; Other 0.0
Surgical Absorbents	15%	5.4	Packs & Patches 3.0; Swabs & Pads 2.4; Cotton wool 0.0
Contact Lens Care	1%	0.3	Soft Contact Lens Care 0.3; Hard Contact Lens Care 0.0; All Contact Lens Care 0.0
Plasters	2%	0.6	Plaster Strip 0.4; Special Plaster 0.2; Liquid Plaster 0.0; Plaster Spec. Uses 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

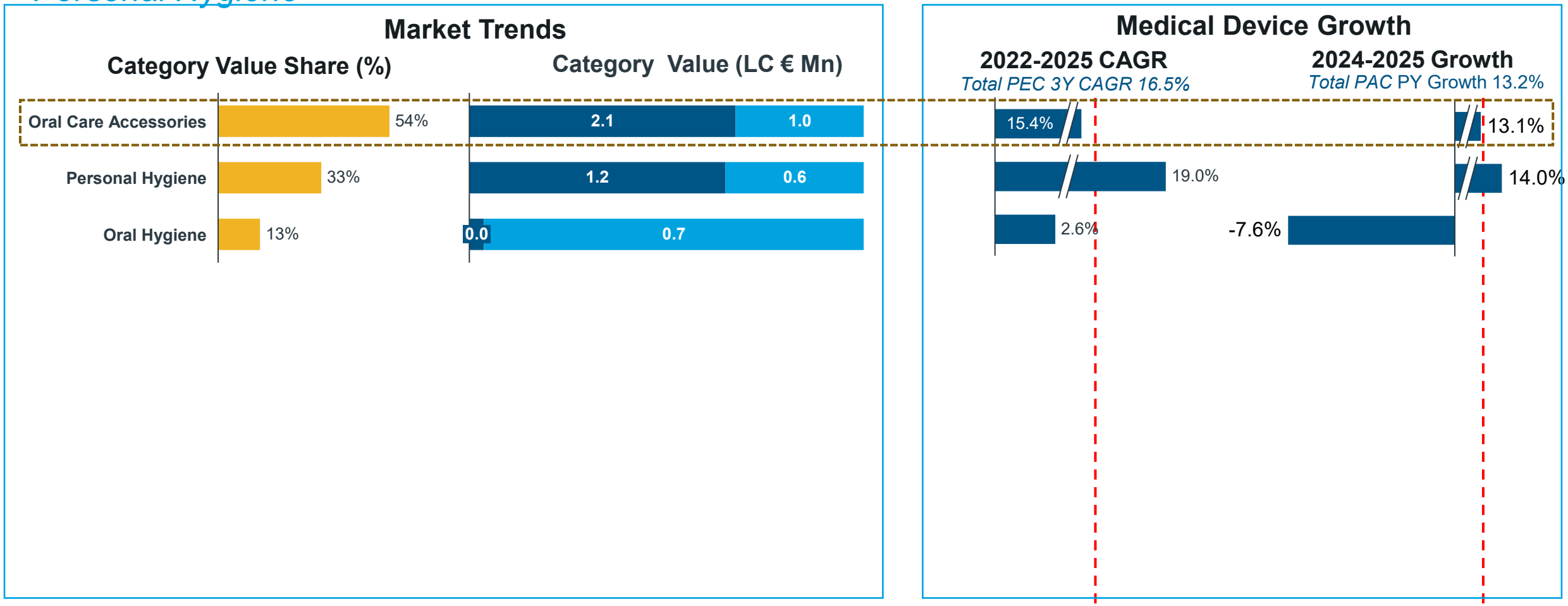
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Croatia PEC Performance by CHC 1 Category

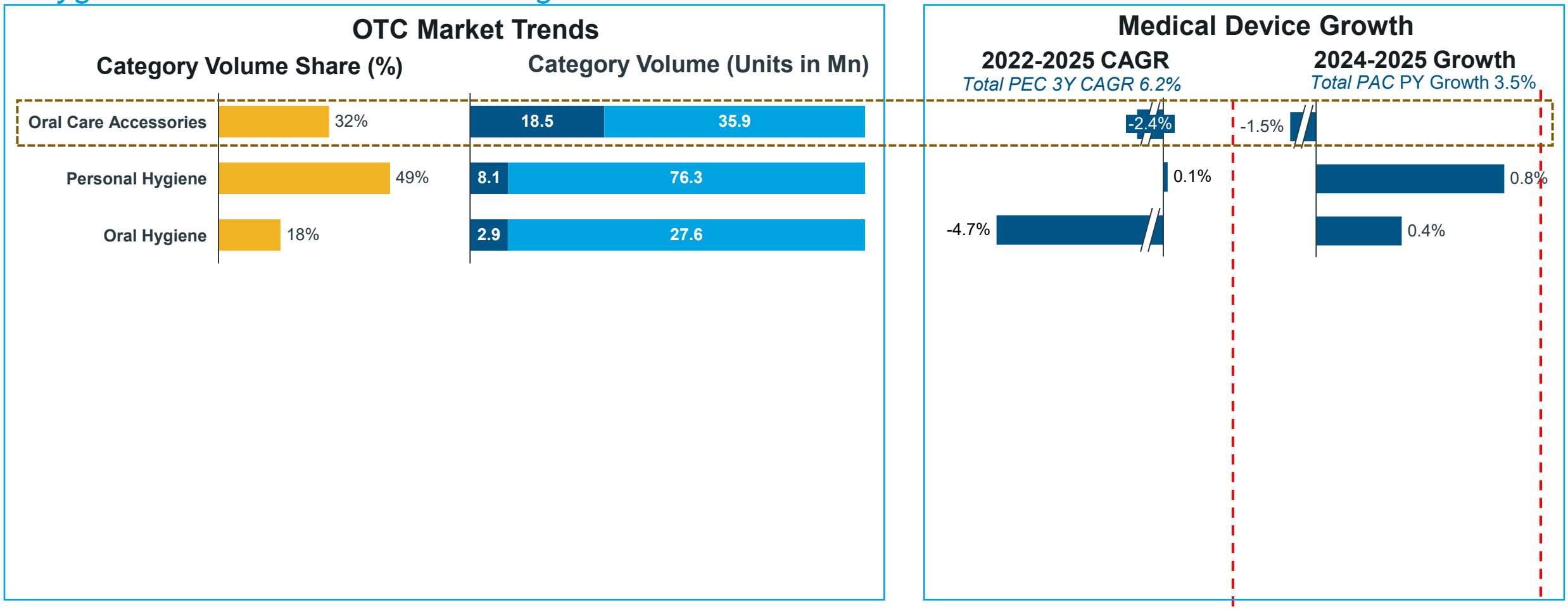
Oral care accessories leads medical devices values showing positive growth in L-T & S-T,followed by Personal Hygiene



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Croatia PEC Performance by CHC 1 Category

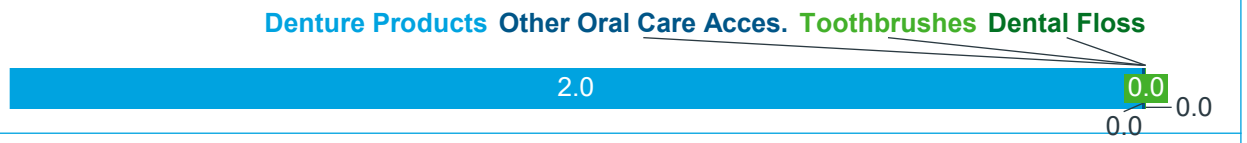
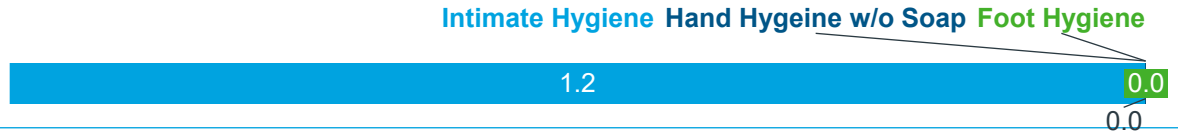
Oral care accessories continues to lead in volumes as well with 18.5 Mn units, while Personal Hygiene shows both S-T and L-T growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Croatia Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share (63%) led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**3.3**	
Oral Care Accessories	63%	2.1	
Personal Hygiene	36%	1.2	
Oral Hygiene	1%	0.0	

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Croatia Medical Devices Performance by top CHC 2 Segments

Denture product lead in volumes, with Oral care accessories leading the highest volume share too

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.4**	
Oral Care Accessories	74%	0.3	Denture Products 0.3; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Floss 0.0
Personal Hygiene	25%	0.1	Intimate Hygiene 0.1; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Hygiene	1%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Netherlands Medical Devices – Market Dynamics

Netherlands Medical Devices Performance Overview

Medical device market has seen tremendous growth both in long-term and short-term; OTC holds the major share

14%

Medical device share of total CH value in 2025

Long –term Growth

9.9% by value

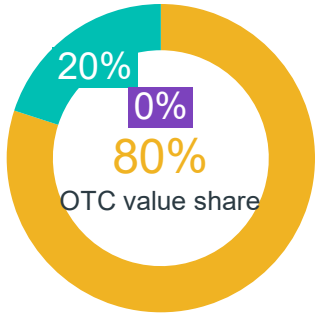
5.1% by volume

Short –term Growth

4.2% by value

1.3% by volume

Medical Devices – €109 Mn (2025)



Long-term Growth (Value)

OTC	PAC	PEC
6.8%	26.5%	6.9%

Medical Devices Categories

44%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **86%** of new pack launches

Medical Devices Innovation

CCR

36% *Share for total OTC value in 2025 Dominated by* ***Nasal saline***

Long-term Growth

3.3% by value

OTC (Over-the-Counter)

Test Instruments

30% *Share of total PAC values in 2025; Dominated by* ***Pregnancy tests***

Long-term Growth

0.1% by value

PAC (Patient care)

Personal Hygiene

53% *Share of total PEC value share in 2025; Dominated by* ***Intimate hygiene***

Long term Growth

11.9% by value

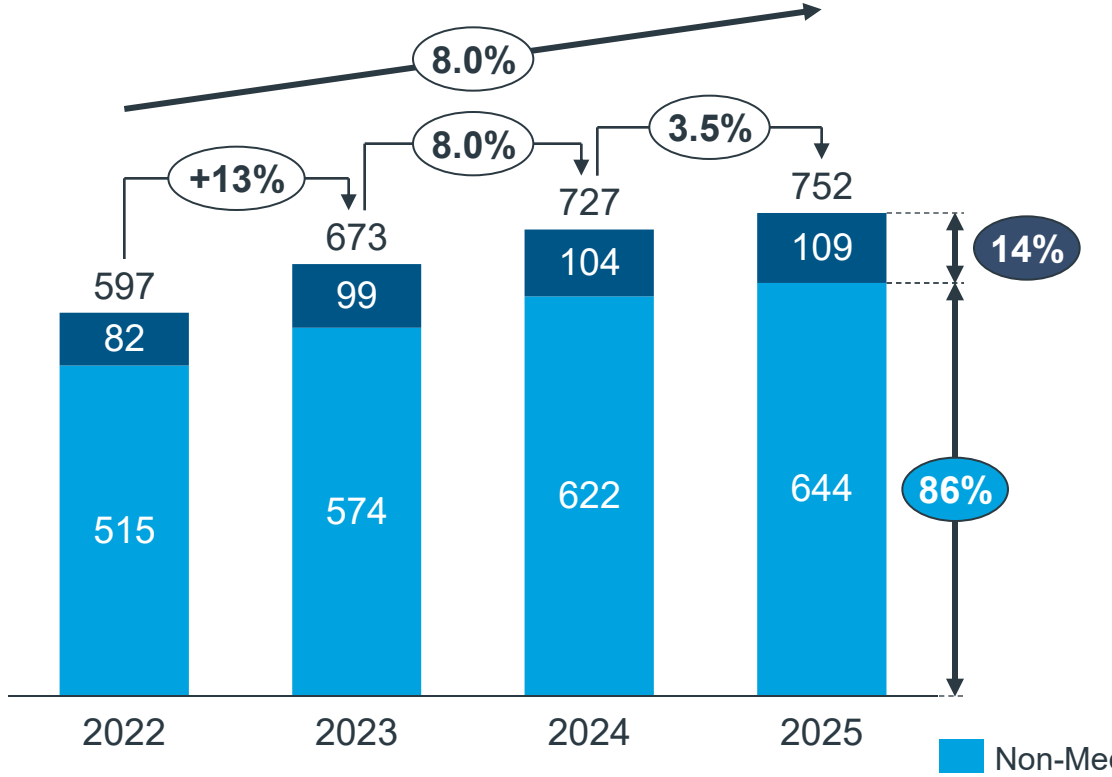
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

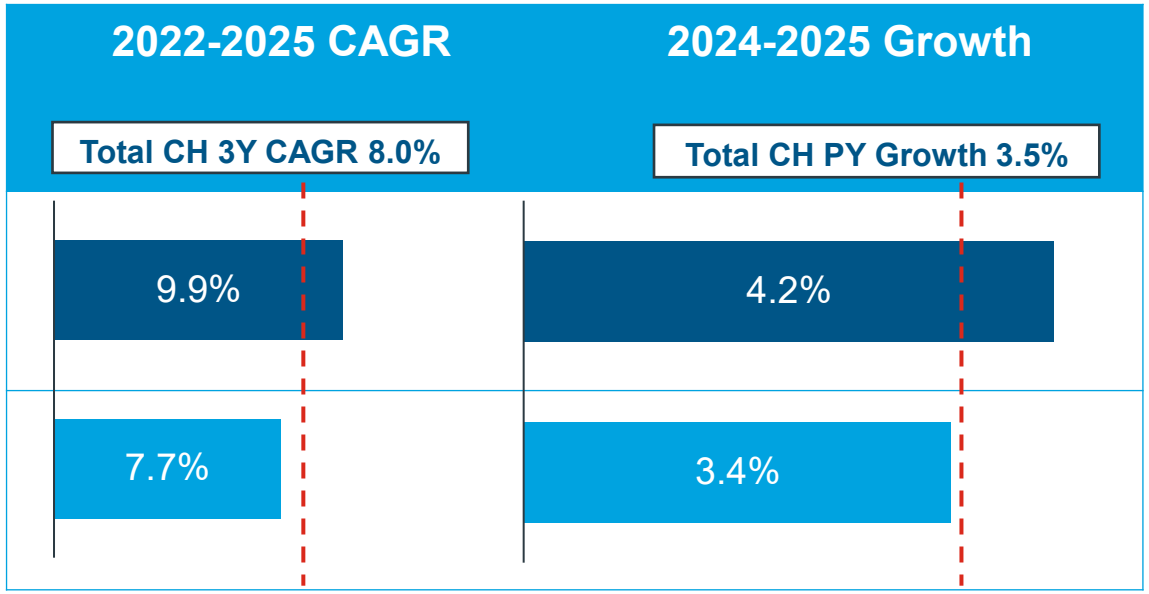
Netherlands CH Market Size & Growth

Overall CH market has experienced an 8% growth between 2022 and 2025, with medical devices accounting for 14% of value share

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

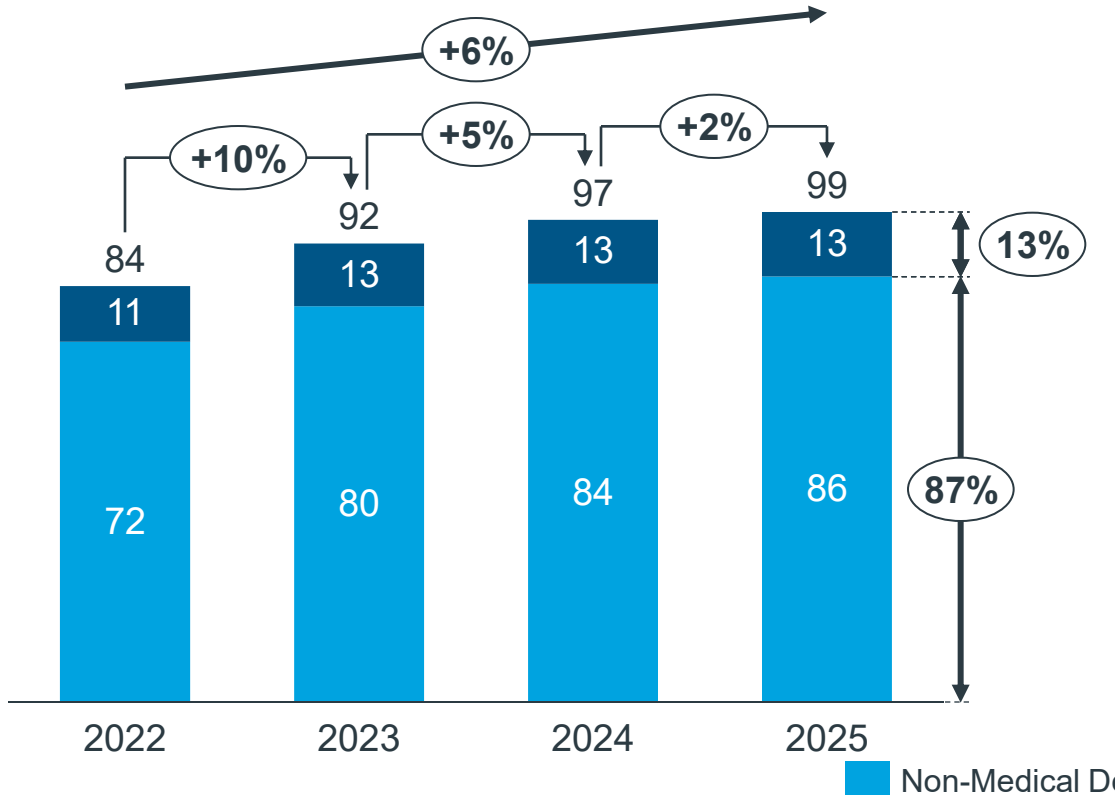


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

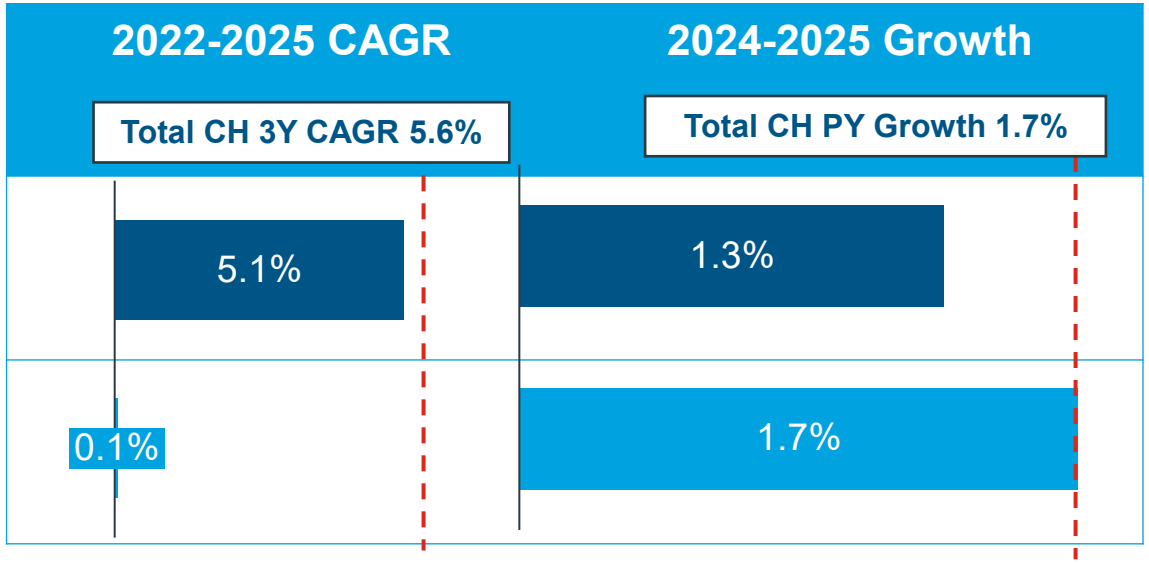
Netherlands CH Market Volume & Growth

Market volume has increased by 6%, and medical devices have experienced significant growth in both the short and long term

Market Volume (Mn Units), and Latest Volume Share (%)



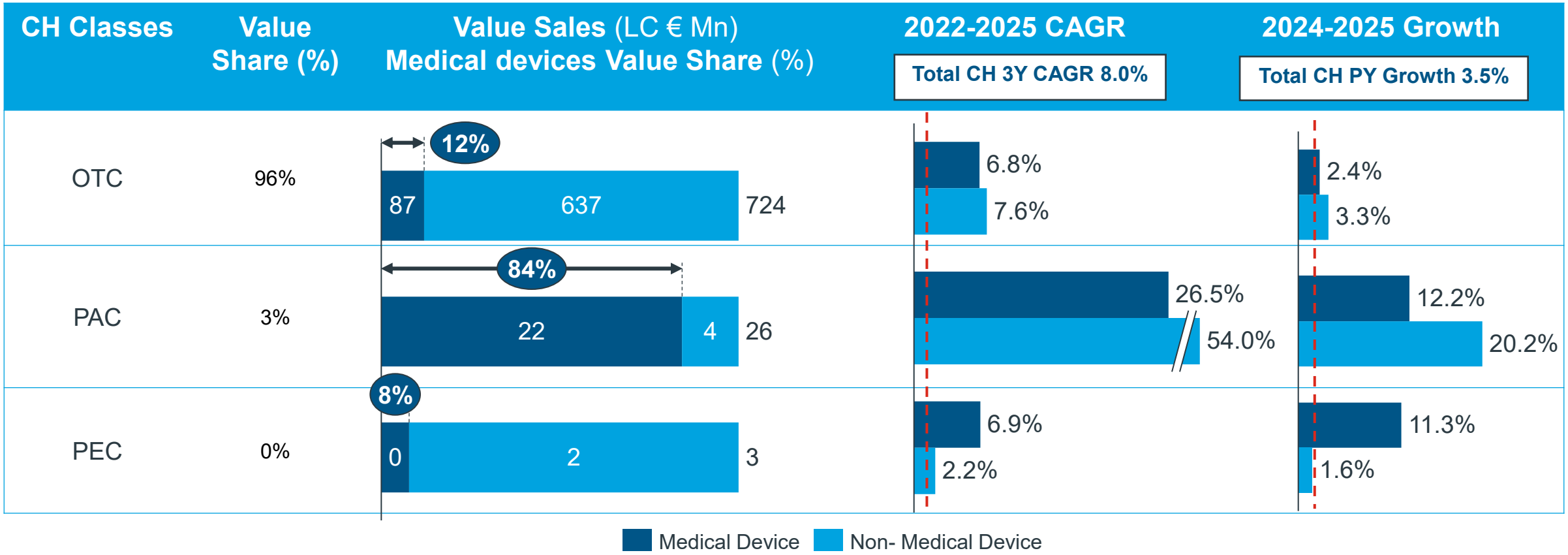
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Netherlands CH Performance by Classes

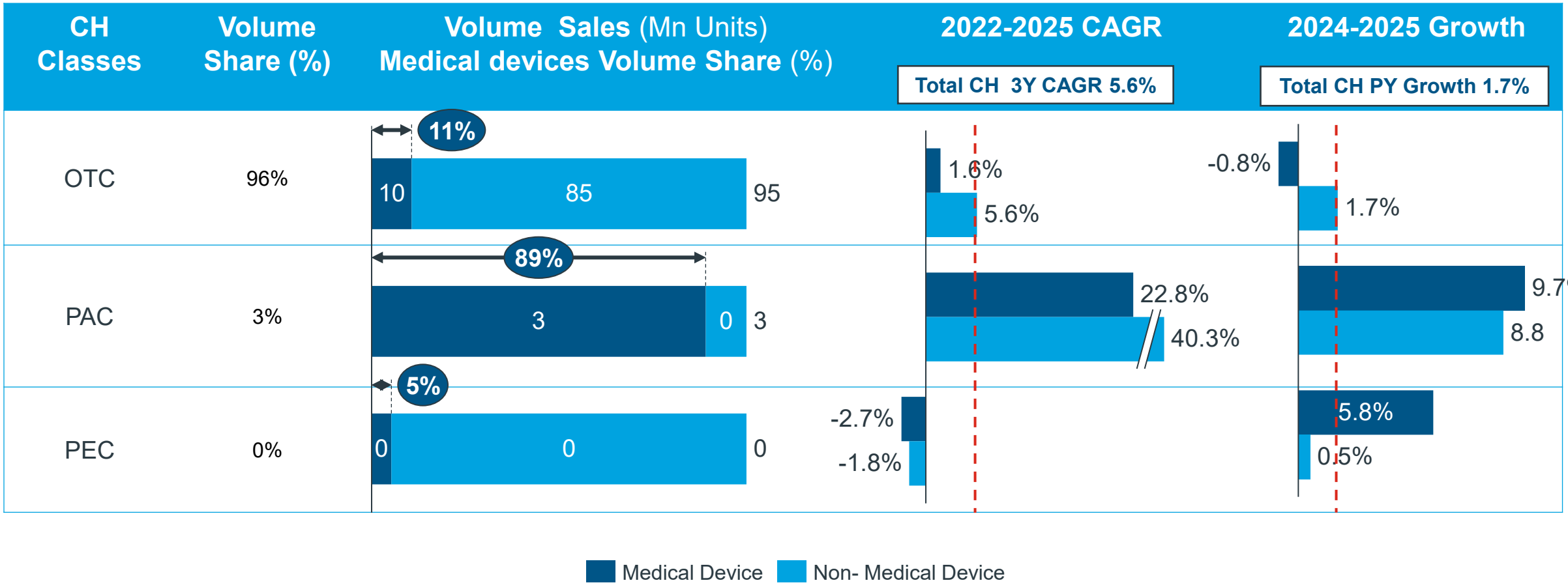
Positive growth trends have been observed across all three medical device classes, with the patient care segment contributing the most



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Netherlands CH Performance by Classes

Patient Care contributes the highest in volumes as well; while OTC has the highest absolute volumes



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Netherlands Medical Devices Packs & New Launches

Patient care segment accounts for highest number of packs among the three CHC 1 segments

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device	Total	Medical Device	Non Medical Device	Total
CH Total	3,341	5,206	**8,547**	1,257	1,596	**2,853**
OTC	619	4,201	**4,820**	169	1,344	**1,513**
Patient Care	2,687	409	**3,096**	1,085	160	**1,245**
Personal Care	35	596	**631**	3	92	**95**

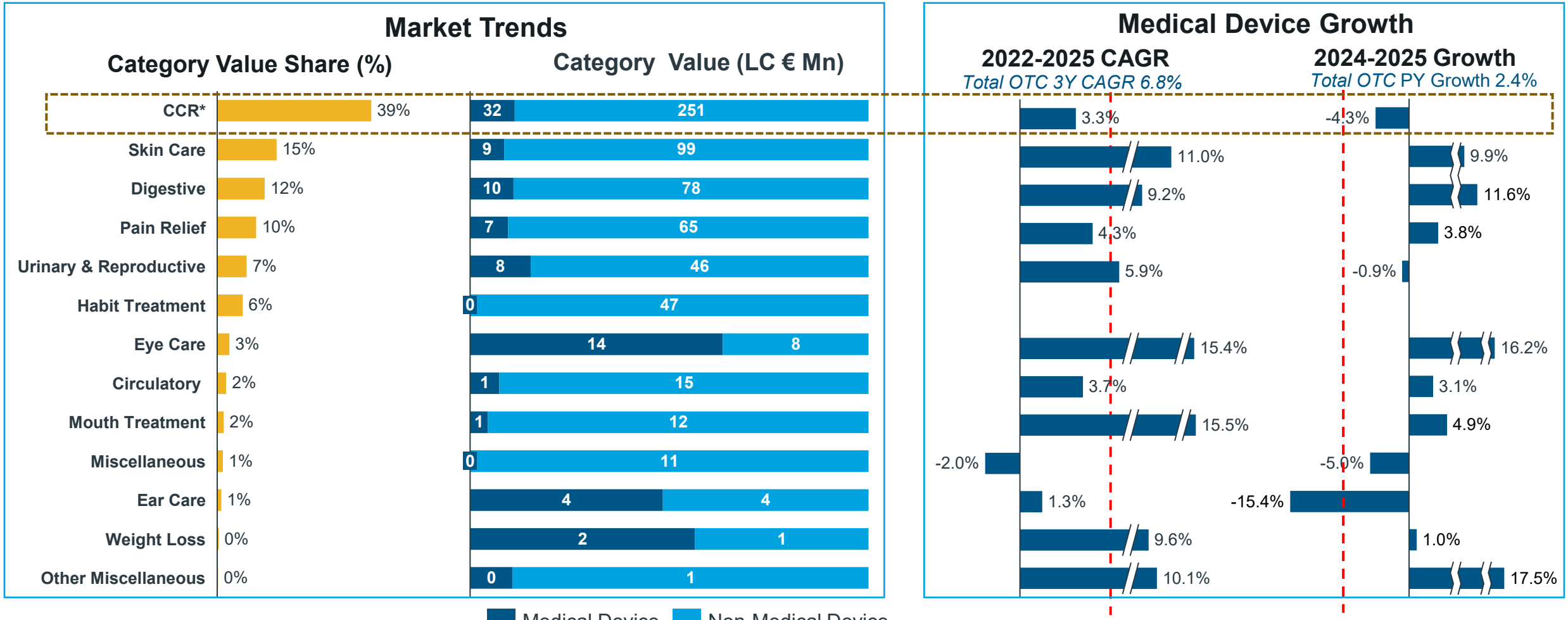
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Netherlands OTC Performance by CHC 1 Category in 2025

CCR leads the OTC segment with €32 Mn in values

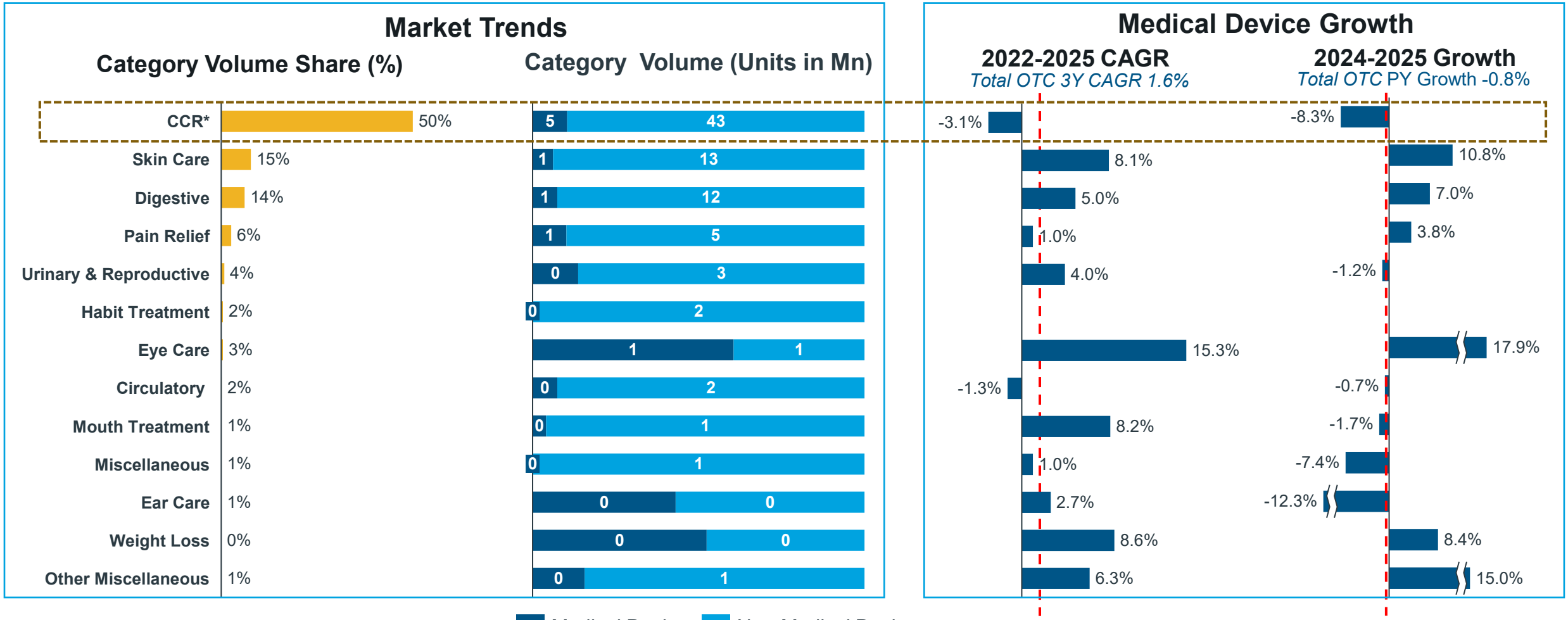


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Netherlands OTC Performance by CHC 1 Category in 2025

CCR leads in volume with 50% of volume share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Netherlands Medical Devices Performance by top CHC 2 Segments

Nasal saline from CCR category leads in medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**86.6**	
CCR	36%	31.5	Nasal Saline 16.2; Sore Throat 10.5; Cough 3.2; Cold Remedies 1.4
Eye Care	16%	14.2	Not available
Digestive	11%	9.5	Laxatives 4.8; Acid & Heartburn 3.0; Digestive 1.5; Antidiarrhoeals 0.2
Skin Care	11%	9.3	Wart/Corn Removal 3.1; Wound Healing 2.0; Hand Skin Wound Disinfect 1.2; Skin Protector/Emollients 1.1
Urinary & Reproductive	9%	8.2	Gynaecological 5.6; Urinary Condition 2.5; Urology 0.1; Male Condition 0.0
Pain Relief	8%	6.8	Muscular Pain 6.2; Dysmenorrhea 0.4; Mouth Pain 0.3; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Netherlands Medical Devices Performance by top CHC 2 Segments

Ear care and weight loss categories have very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	4%	3.6	Not available
Weight Loss	2%	1.6	Not available
Circulatory	1%	1.2	Antihemorrhoids 1.1; Chloesterol Regulating 0.1; Other Circulatory 0.0
Mouth Treatment	1%	0.5	Other Mouth Treatment 0.4; Mouth Infection 0.1; Fluoride Products 0.0
Other Miscellaneous	0%	0.2	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Netherlands Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in volumes followed by sore throat

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**10.1**	
CCR	49%	5.0	Nasal Saline 2.7; Sore Throat 1.9; Cough 0.3; Cold Remedies 0.2
Eye Care	15%	1.5	Not available
Digestive	10%	1.0	Laxatives 0.5; Acid & Heartburn 0.4; Digestive 0.1; Antidiarrhoeals 0.0
Skin Care	8%	0.9	Wart/Corn Removal 0.2; Wound Healing 0.2; Skin Protector/Emollients 0.1; Hand Skin Wound Disinfect 0.1
Urinary & Reproductive	5%	0.5	Gynaecological 0.3; Urinary Condition 0.1; Urology Male Condition 0.0
Pain Relief	6%	0.6	Muscular Pain 0.5; Dysmenorrhea 0.1; Mouth Pain 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Netherlands Medical Devices Performance by top CHC 2 Segments

Ear care and weight loss categories occupy a very small share in volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	3%	0.3	Not available
Weight Loss	1%	0.1	Not available
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Other Miscellaneous	1%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

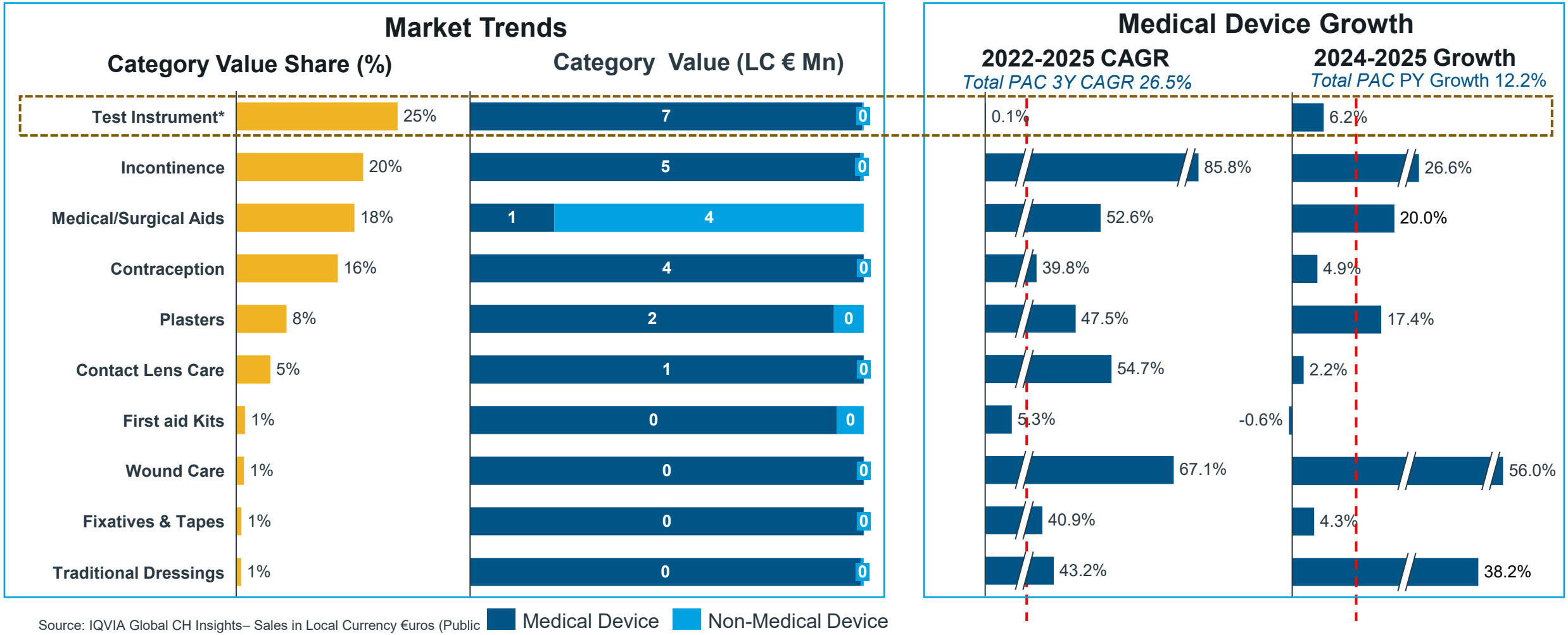
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Netherlands PAC Performance by CHC 1 Category in 2025 (1/2)

Test Instruments account for highest medical device values at €7 Mn

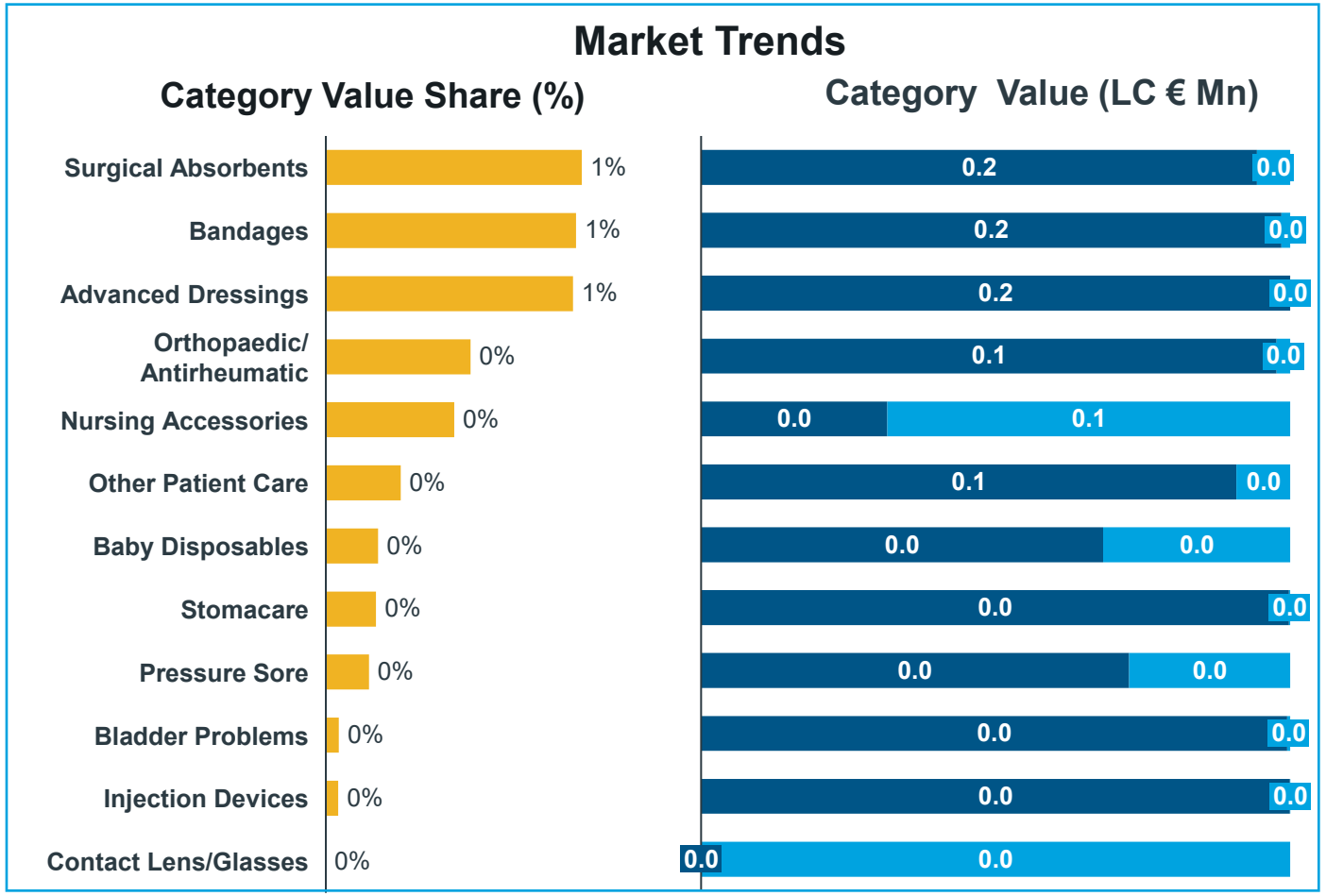


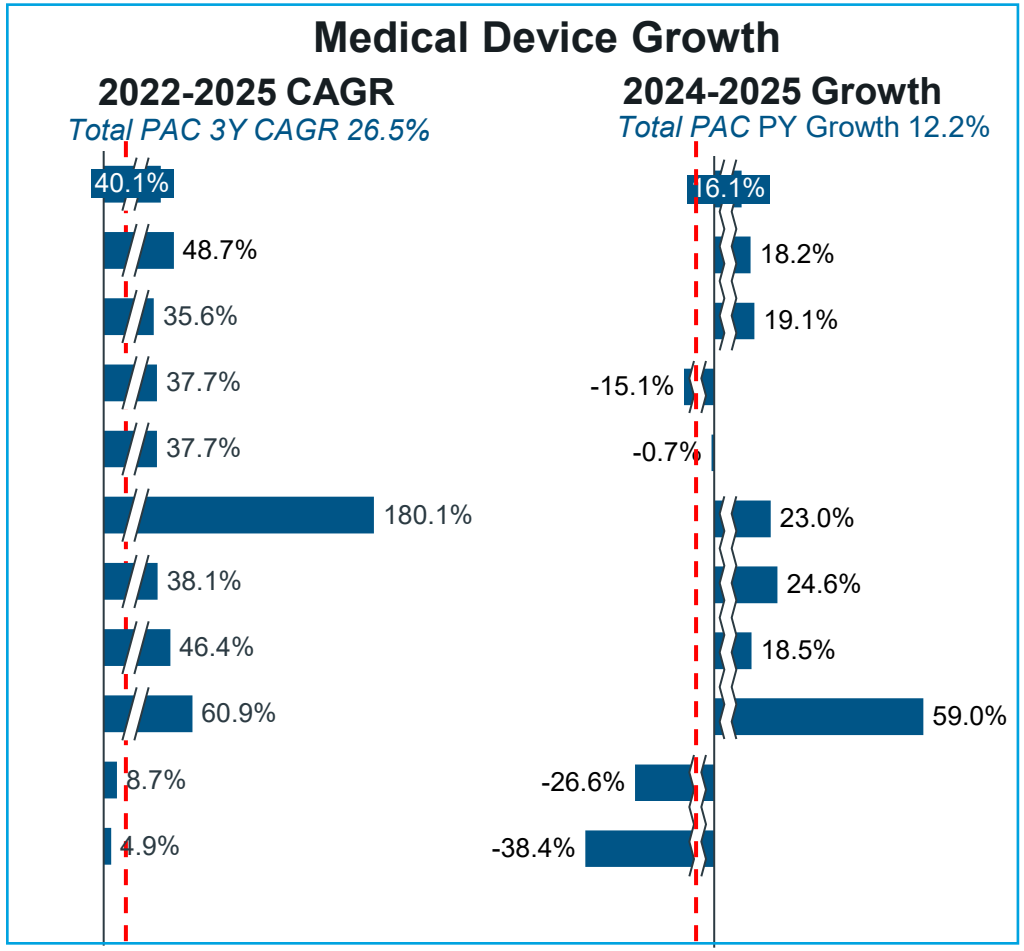
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments;

Netherlands PAC Performance by CHC 1 Category in 2025 (2/2)

Smaller categories have demonstrated strong growth rates



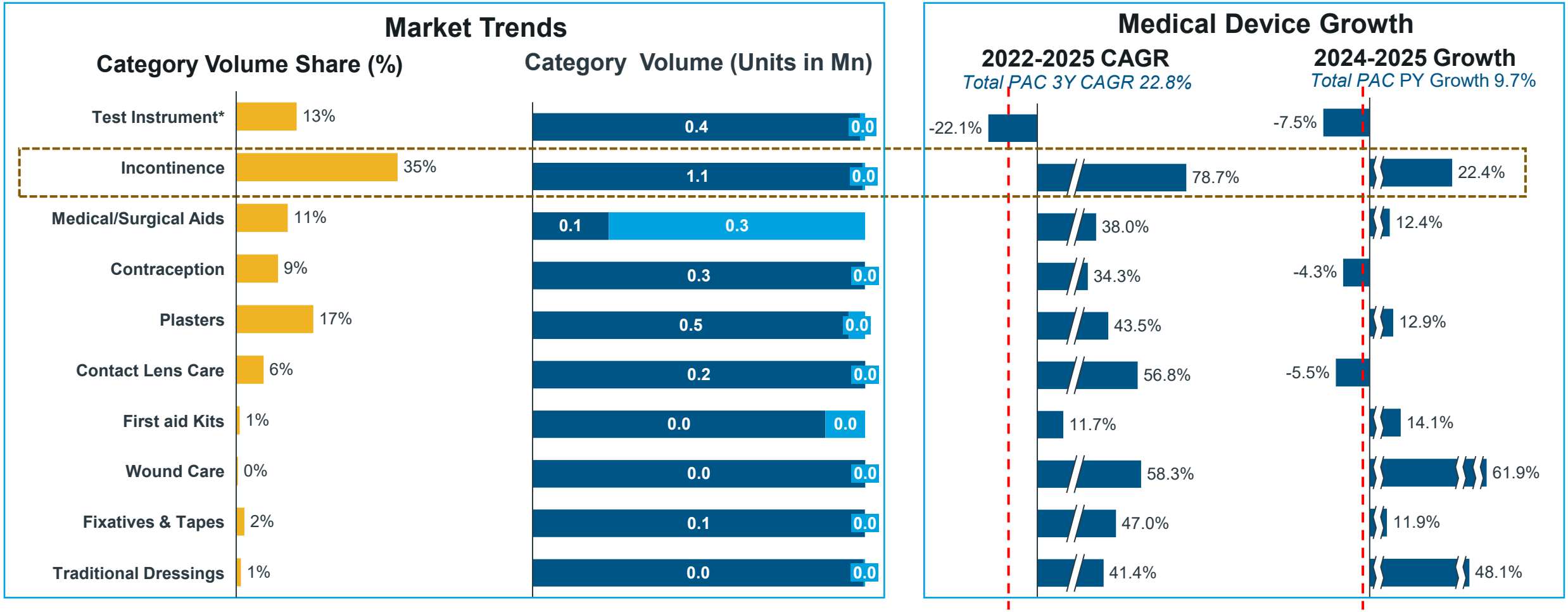


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

Netherlands PAC Performance by CHC 1 Category (1/2)

Incontinence products are leading in volumes with strong short-erm and long-term growth

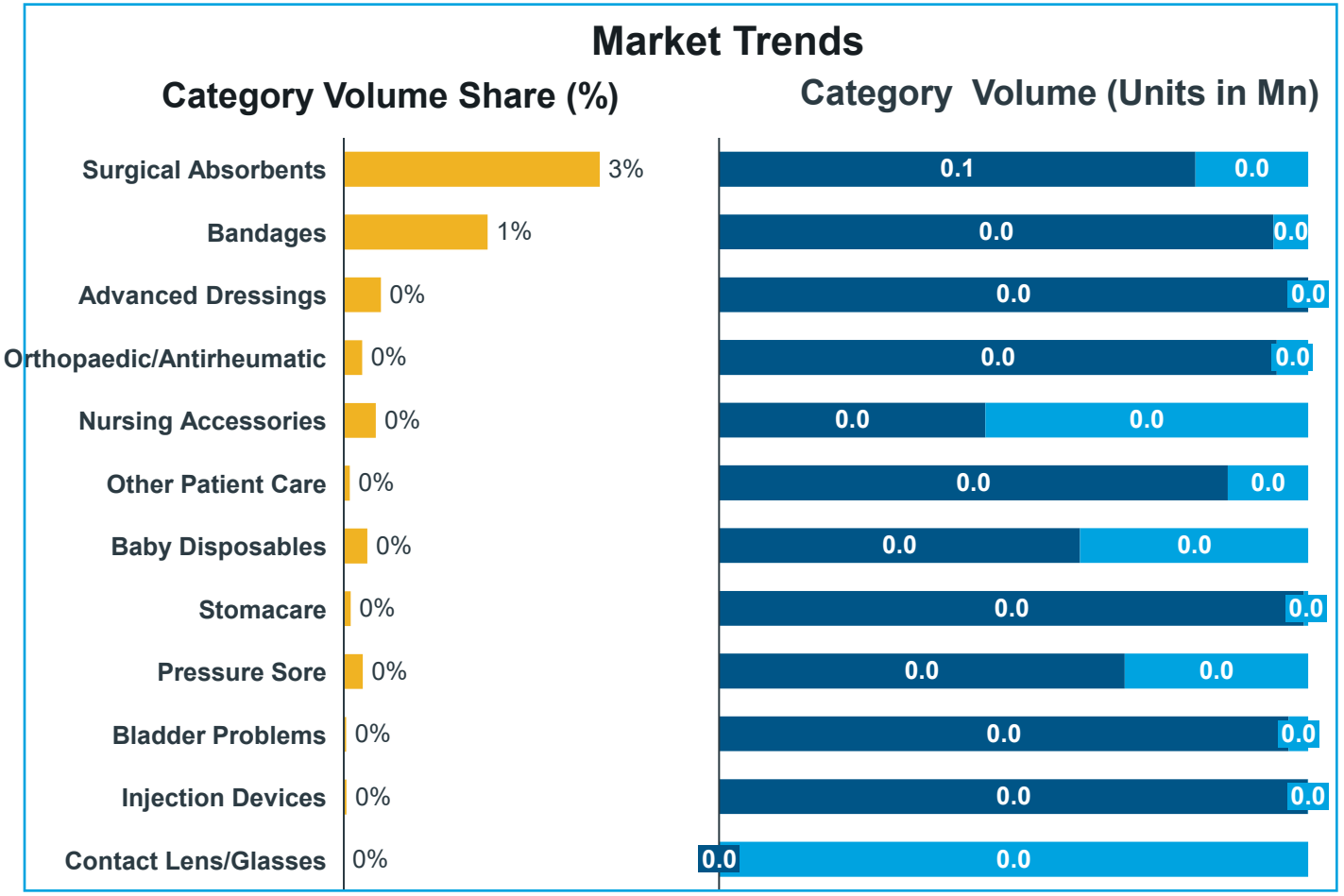


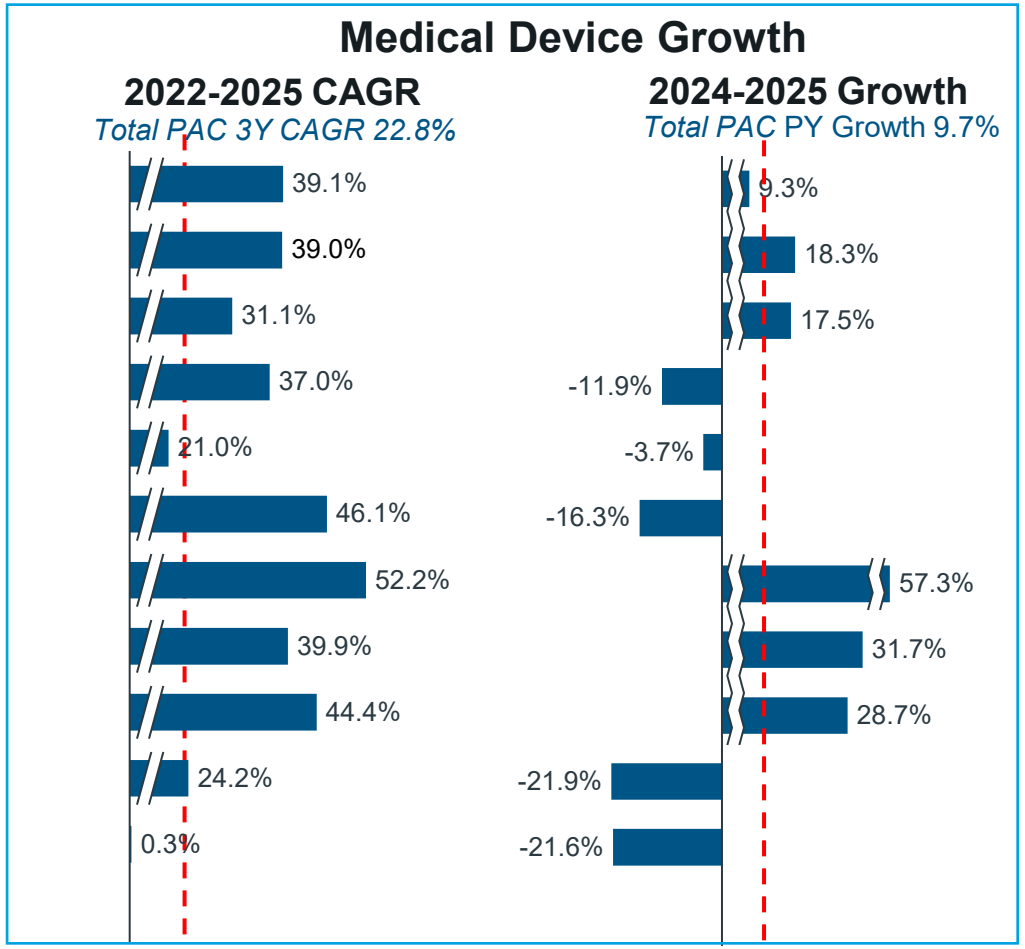
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Test instruments include both test and measuring instruments

Netherlands PAC Performance by CHC 1 Category (2/2)

Overall, the medical devices have demonstrated impressive growth in PAC segment





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Netherlands Medical Devices Performance by top CHC 2 Segments

Top 6 CHC categories account for 95% of medical device values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**22.1**	
Test Instrument	30%	6.6	Pregnancy Test 2.1; Gluc Measuring 1.8; Ovulat Tests 1.7; Oth Diagnostic Tests 0.2
Incontinence	23%	5.1	Light Incontinence 2.7; Mod Heav Sev Incont. 2.4; Bed Sheets/Pads 0.0; Incontinence care 0.0
Contraception	19%	4.1	Condoms 4.1
Plasters	9%	1.9	Plaster Strip 1.3; Special Plaster 0.5; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Contact Lens Care	6%	1.4	Soft Contact Lens Care 0.7; Hard Contact Lens Care 0.5; All Contact Lens Care 0.2
Medical/Surgical Aids	5%	1.0	Miscellaneous 0.9; Hot & Cold Packs 0.1; Enemas/Douches+Cannulas 0.0; Inhalation & Aerosol 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

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Netherlands Medical Devices Performance by top CHC 2 Segments

In volumes, light incontinence products take the lead

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**2.9**	
Test Instrument	14%	0.4	Pregnancy Test 0.2; Gluc Measuring 0.1; Ovulat Tests 0.1; Coronavirus Test 0.0
Incontinence	39%	1.1	Light Incontinence 0.6; Mod Heav Sev Incont. 0.5; Bed Sheets/Pads 0.0; Incontinence care 0.0
Contraception	10%	0.3	Condoms 0.3
Plasters	18%	0.5	Plaster Strip 0.4; Special Plaster 0.1; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Contact Lens Care	7%	0.2	Soft Contact Lens Care 0.1; Hard Contact Lens Care 0.1; All Contact Lens Care 0.0
Medical/Surgical Aids	3%	0.1	Miscellaneous 0.1; Hot & Cold Packs 0.0; Enemas/Douches+Cannulas 0.0; Inhalation & Aerosol 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

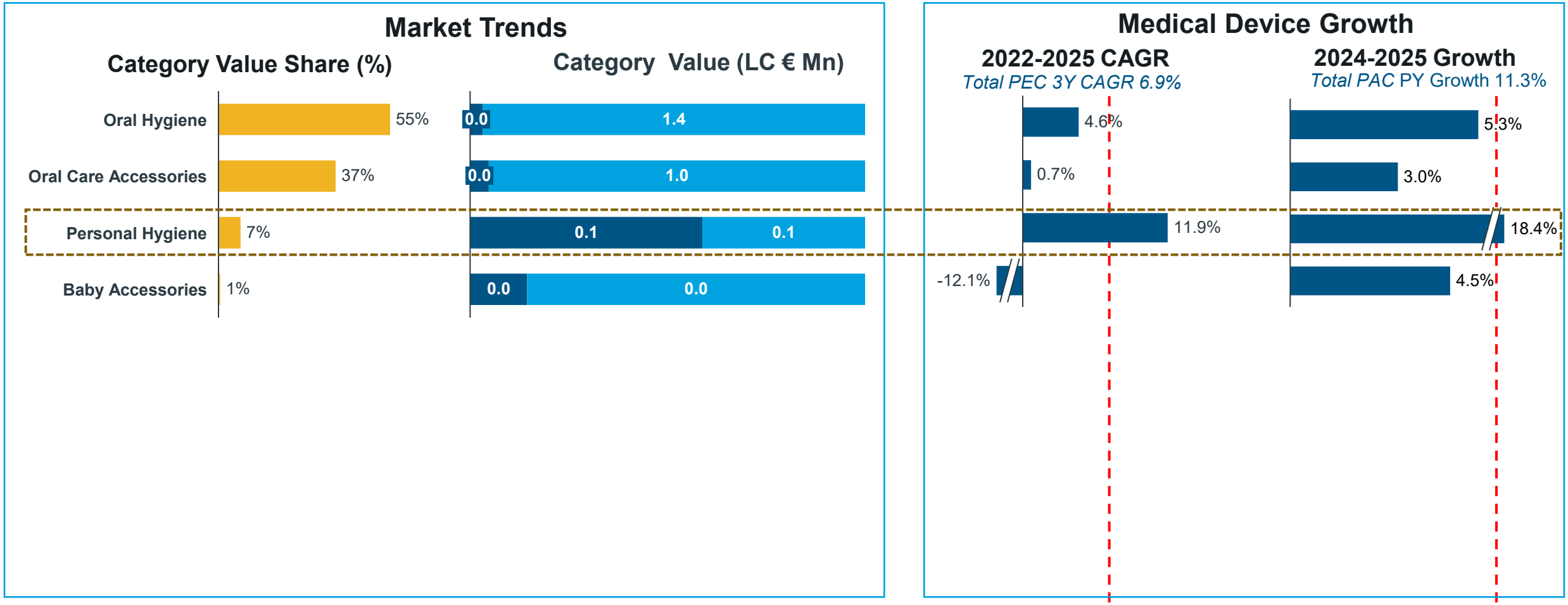
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Netherlands PEC Performance by CHC 1 Category

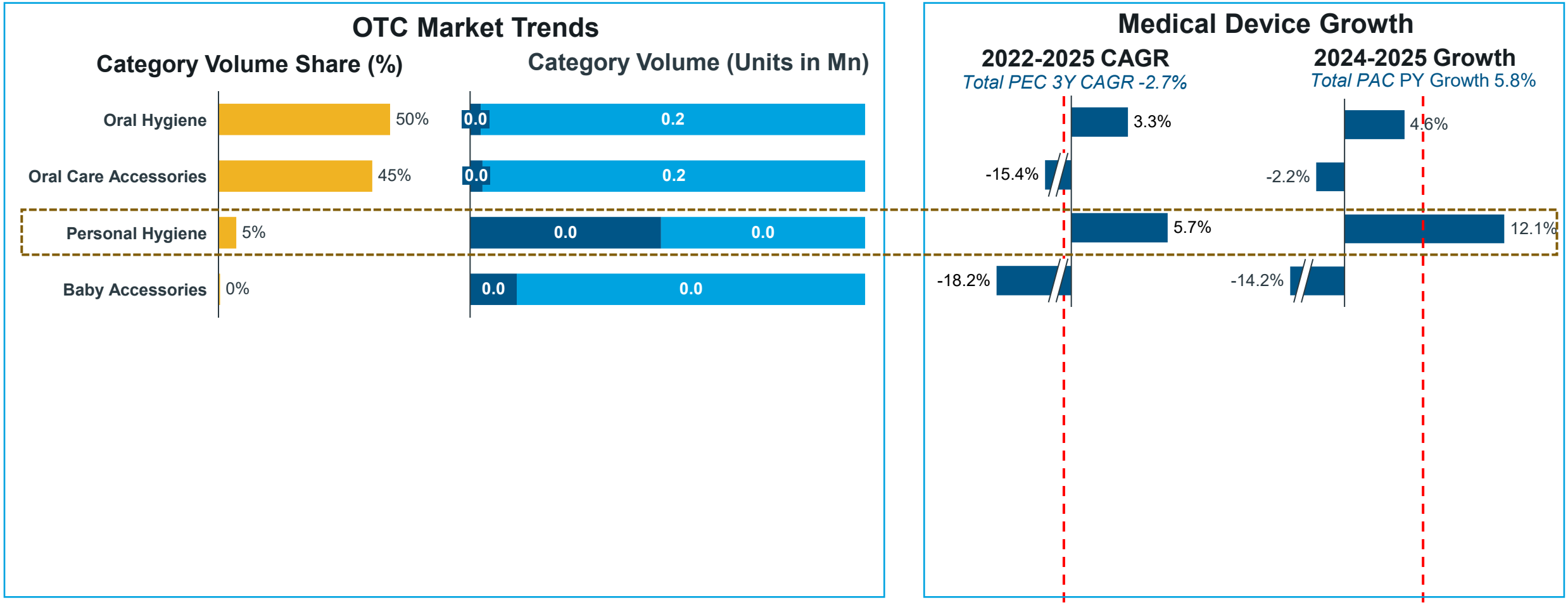
Personal hygiene products dominate the medical device market in terms of value



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Netherlands PEC Performance by CHC 1 Category

Personal hygiene leads in volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Netherlands Medical Devices Performance by top CHC 2 Segments

Intimate hygiene from personal hygiene segment is top performing CHC 2 segment

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**0.2**	
Personal Hygiene	53%	0.1	Intimate Hygiene 0.1; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	23%	0.0	Denture Products 0.0; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	23%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	1%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Netherlands Medical Devices Performance by top CHC 2 Segments

When it comes to volume, intimate hygiene also holds the leading position

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.0**	
Personal Hygiene	47%	0.0	Intimate Hygiene 0.0; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Care Accessories	27%	0.0	Denture Products 0.0; Other Oral Care Acces. 0.0; Dental Sticks 0.0; Toothbrushes 0.0
Oral Hygiene	25%	0.0	Toothpastes 0.0; Mouthwashes 0.0; Other Oral Care 0.0
Baby Accessories	1%	0.0	Feeding Bottles &Acces. 0.0; Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Slovenia Medical Devices – Market Dynamics

Slovenia Medical Devices Performance Overview

Medical devices has been growing L-T at 7.4% reaching ~78 Mn in 2025

38%

Medical device share of total CH value in 2025

Long –term Growth

7.4% by value

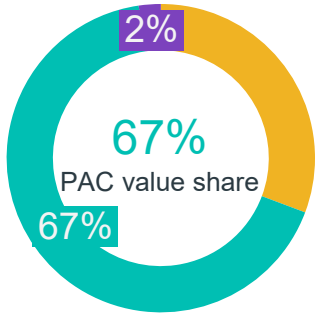
2.3% by volume

Short –term Growth

8.3% by value

3.7% by volume

Medical Devices – €78 Mn (2025)



Long-term Growth (Value)

5.7% PAC | **11.1%** OTC | **12.4%** PEC

Medical Devices Categories

43%

Contribution to total new pack launches in last 3 years; **Patient care** accounts for **80%** of new pack launches

Medical Devices Innovation

Test Instruments

39% Share of total PAC values in 2025; Dominated by **Gluc measuring**

Long-term Growth

9.8% by value

PAC (Patient care)

Eye Care

36% *Share for total OTC value in 2025, Dominated by Nasal Saline*

Long-term Growth

13.2% by value

OTC (Over-the-Counter)

Oral Care Accessories

61% *Share of total PEC value share in 2022; Dominated by **Denture products***

Long term Growth

9.7% by value

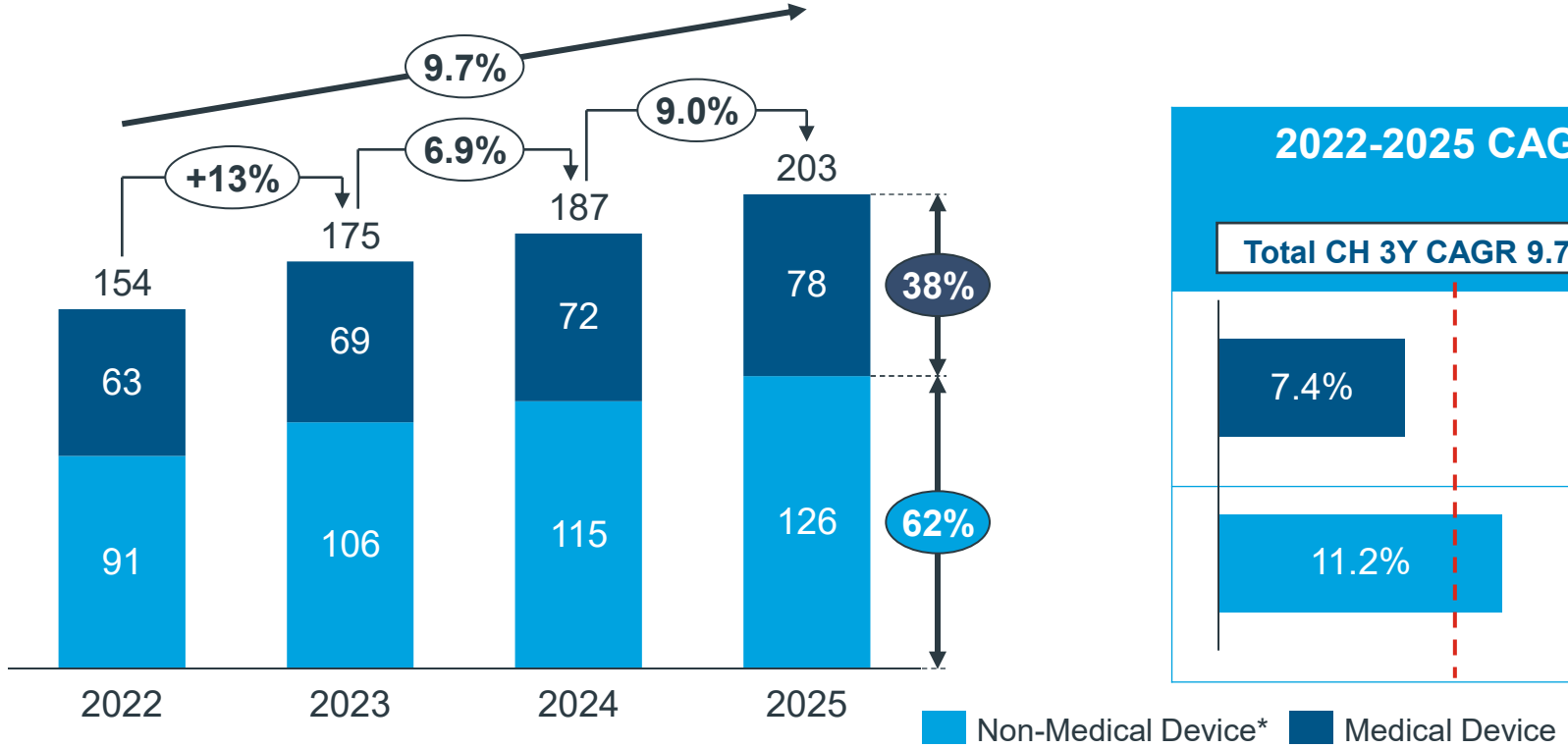
PEC (Personal Care)

Source: IQVIA Global CH Insights - MAT Q2 2025

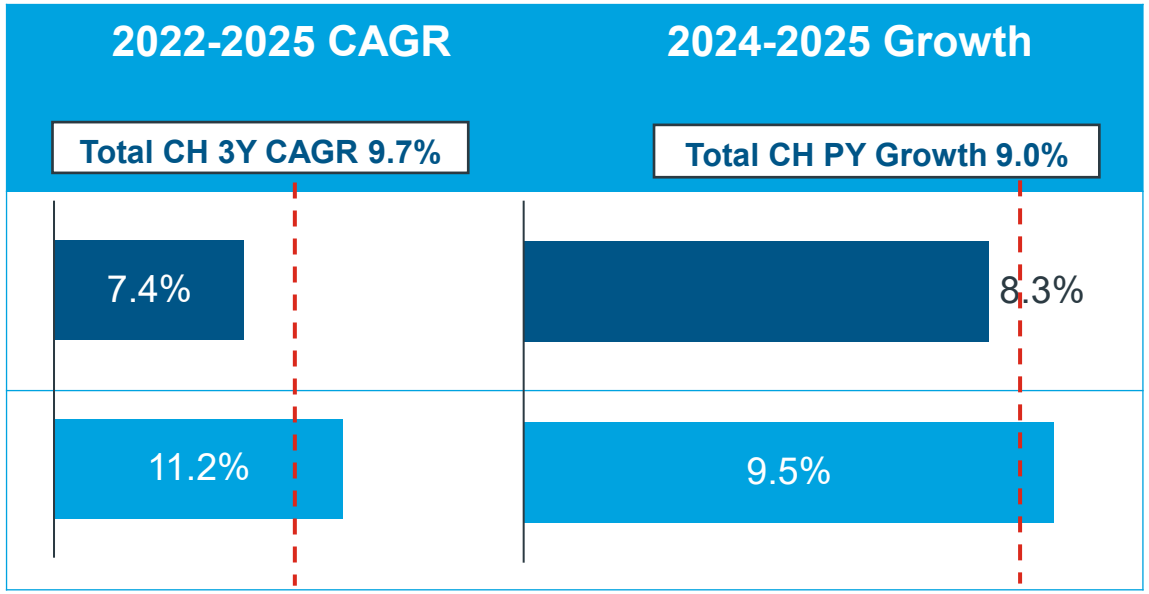
Slovenia CH Market Size & Growth

The CH market has grown by 9.7% between 2022 and 2025, with medical devices making up 38% of the market shares

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

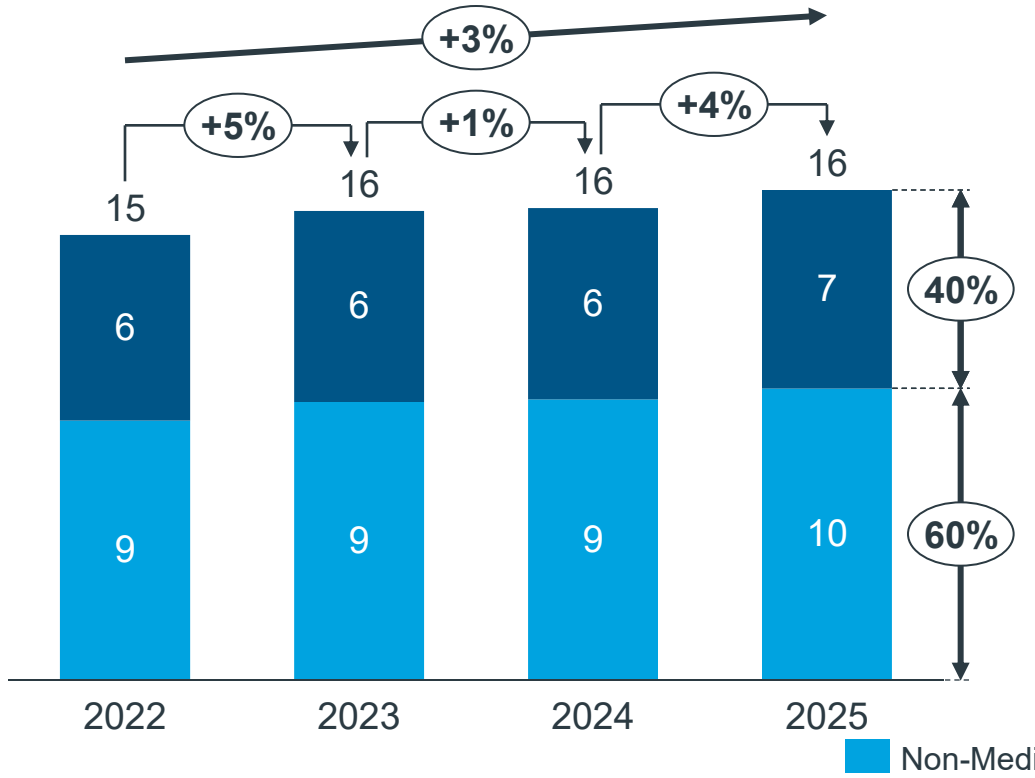


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

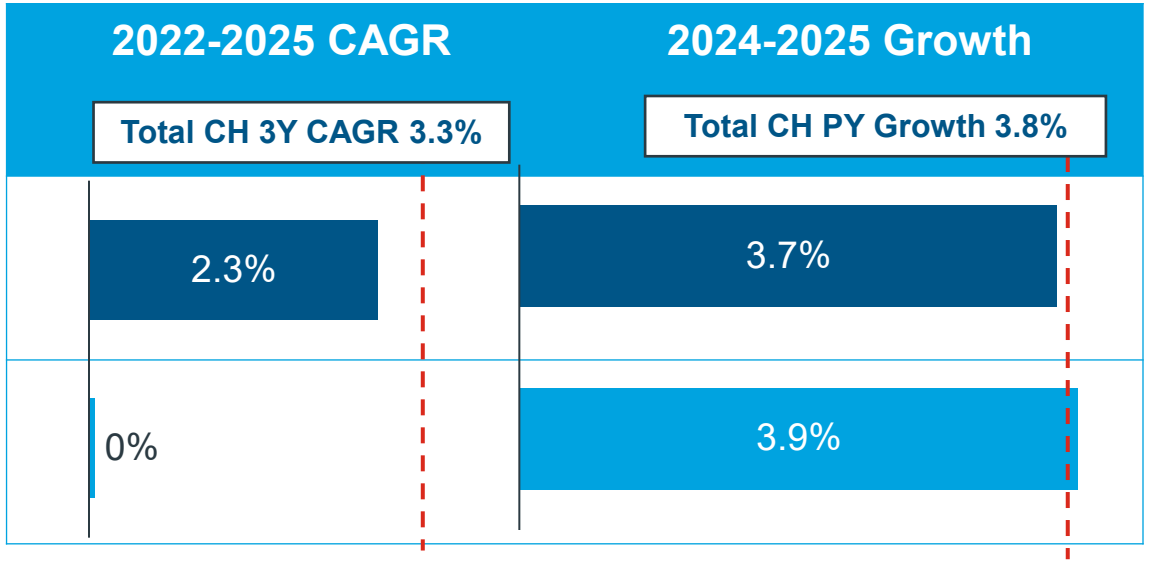
Slovenia CH Market Volume & Growth

Medical devices account for 40% of the CH market volume, while overall market has grown at 3.3% between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



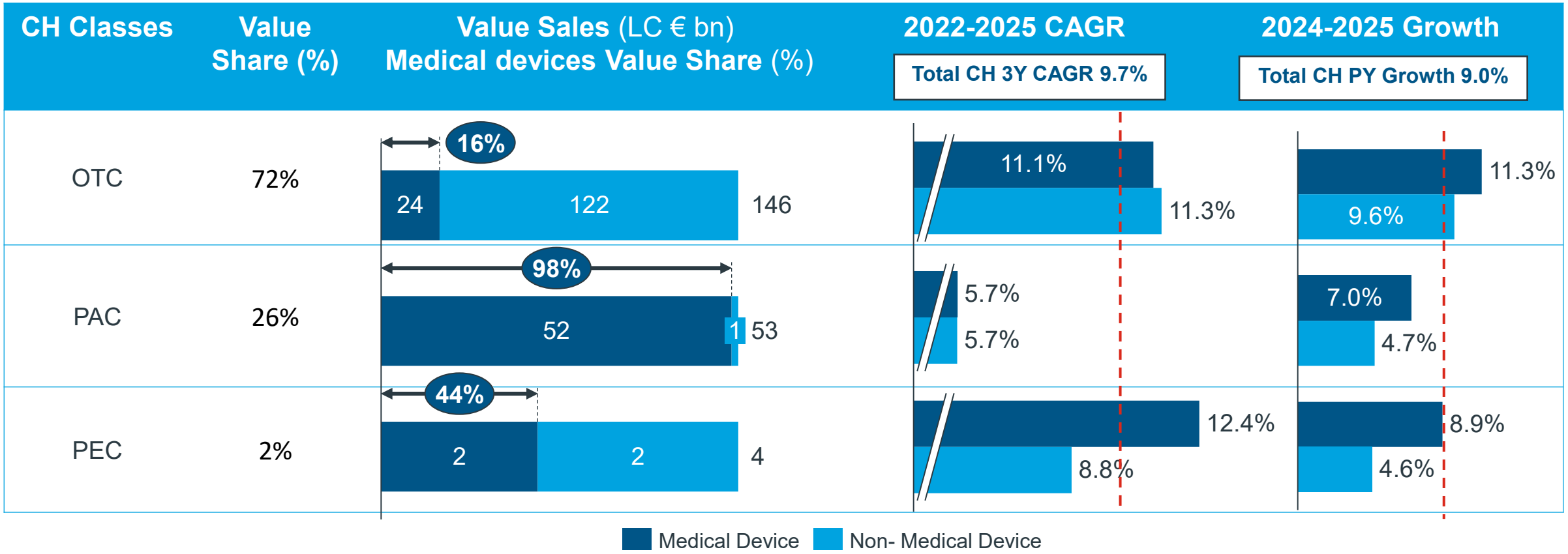
Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Slovenia CH Performance by Classes

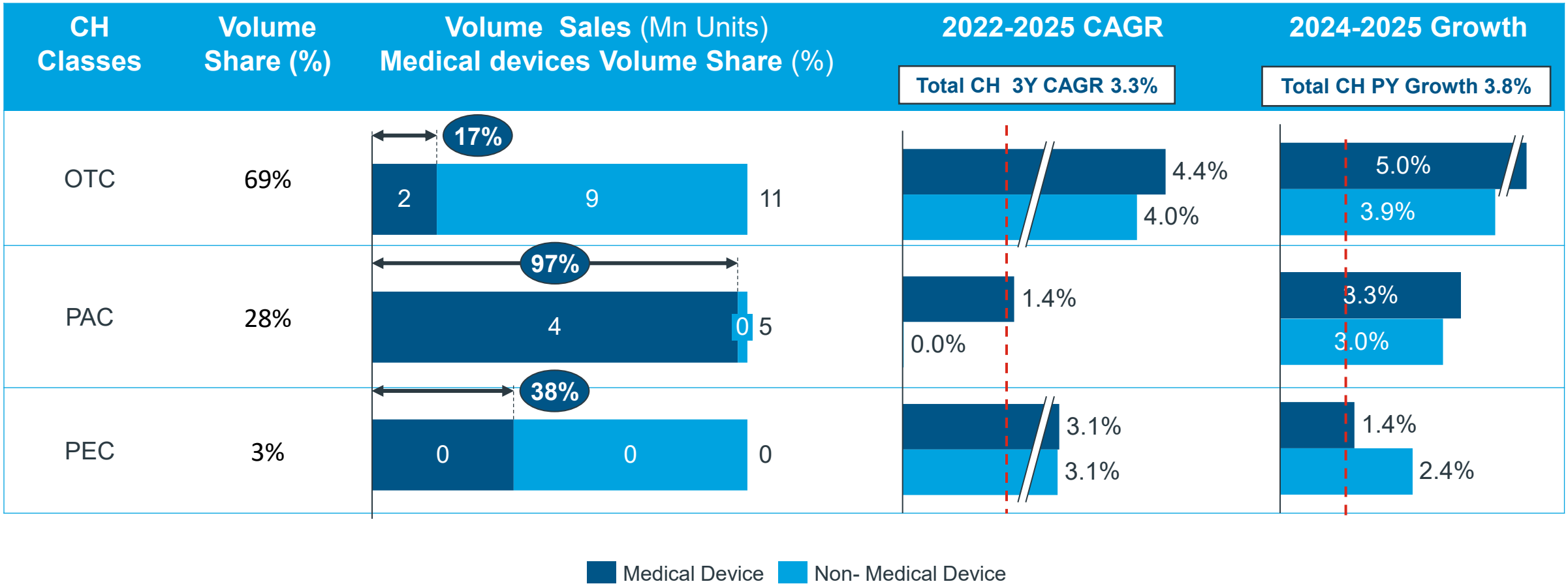
*PAC leads with **€52 Mn** in medical device sales, while contributing highest (98%) in the medical devices segment*



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Slovenia CH Performance by Classes

Patient Care leads in medical device volume sales with 4 Mn units and holds the highest medical device volume share (97%), while OTC dominates overall CH volume



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Portugal Medical Devices Packs & New Launches

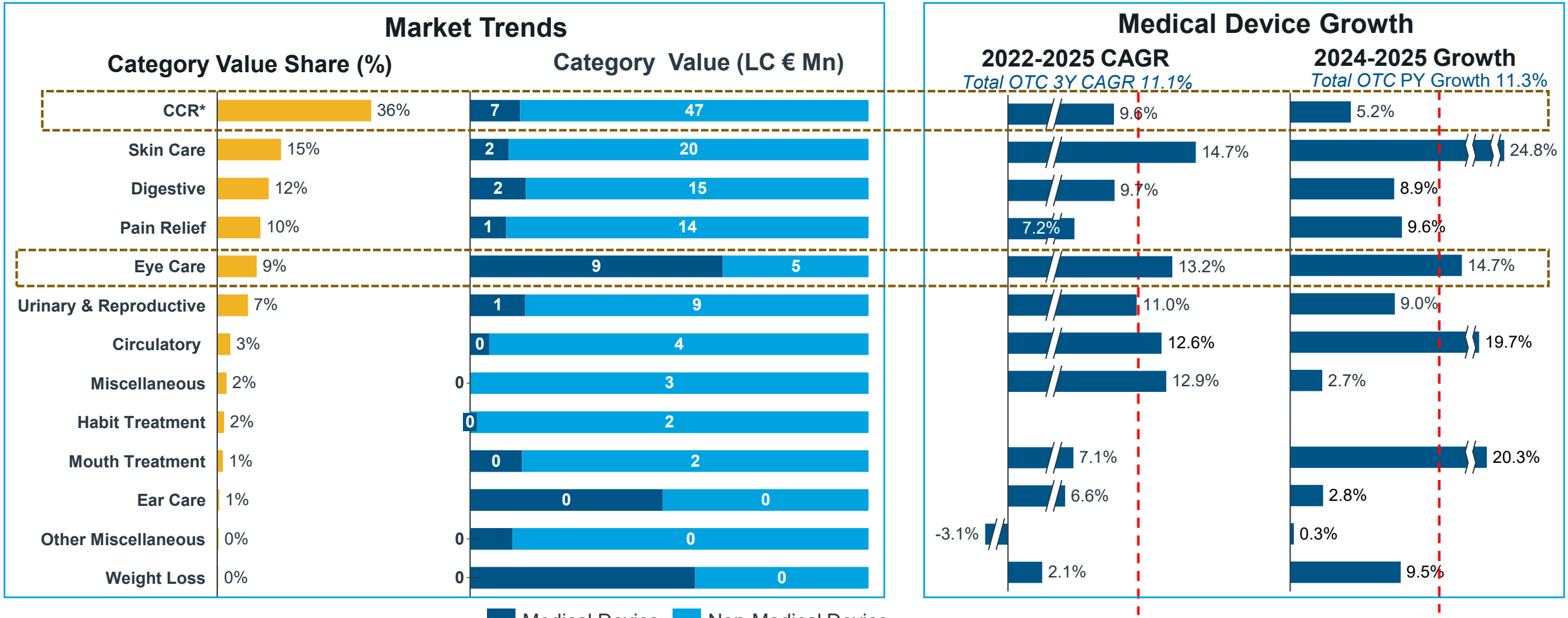
The majority of the Medical devices new launches come from Patient Care category in last 3 years

Category	Total Packs*			New Launches**		
	Medical Device	Non Medical Device		Medical Device	Non Medical Device	
CH Total	2,128	2,058	**4,186**	377	510	**887**
OTC	249	1,331	**1,580**	67	344	**411**
Patient Care	1,833	199	**2,032**	302	31	**333**
Personal Care	46	528	**574**	8	135	**143**

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Slovenia OTC Performance by CHC 1 Category in 2025

*Eye care leads in total medical devices value sales at **€9 Mn,** followed by CCR at **€7 Mn***

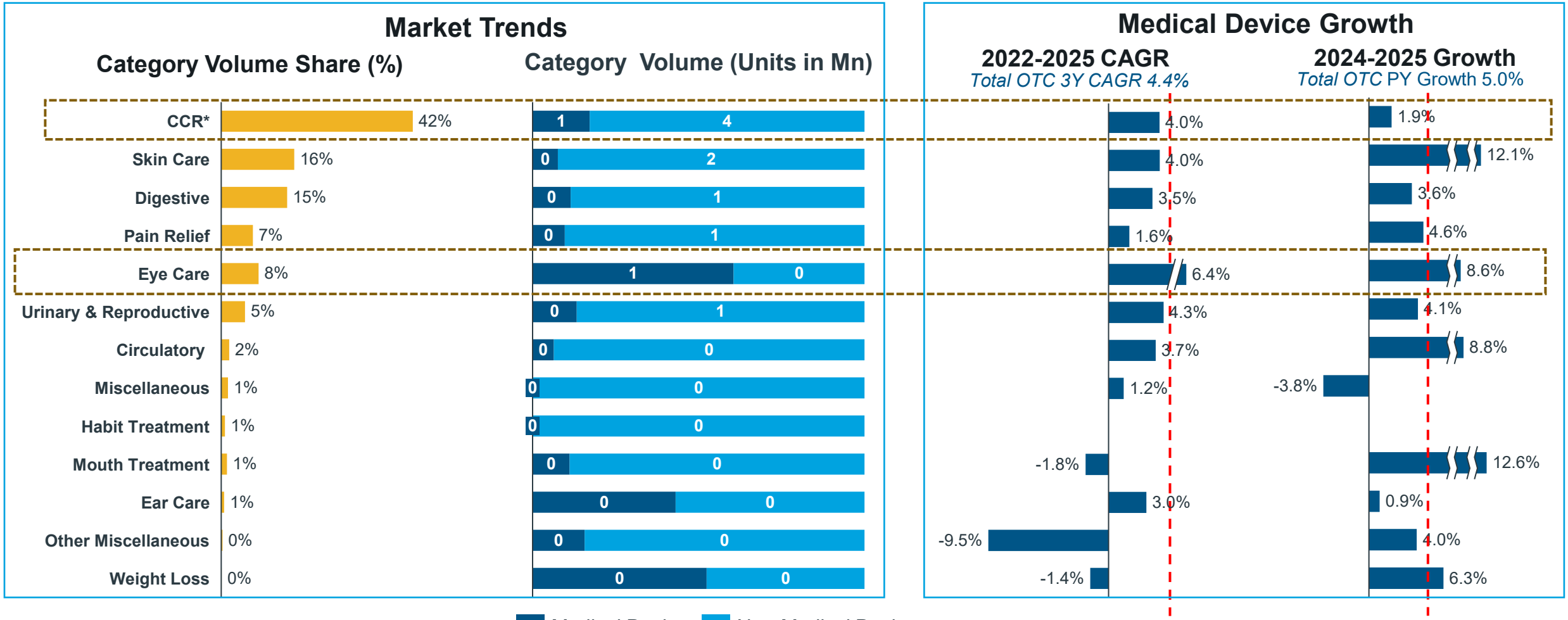


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Slovenia OTC Performance by CHC 1 Category in 2025

CCR and Eye care holds the highest medical device sales in terms of volume share



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Slovenia Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for ~ 95% of values; led by Eye Care

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**24.0**	
Eye Care	36%	8.7	Not available
CCR	28%	6.7	Sore Throat 3.6; Nasal Saline 2.3; Cough 0.4; Cold Remedies 0.3
Digestive	10%	2..5	Laxatives 1.5; Digestive 0.5; Acid & Heartburn 0.4; Antidiarrhoeals 0.0
Skin Care	9%	2.1	Wound Healing 1.0; Hand Skin Wound Disinfect 0.5; Wart/Corn Removal 0.3; Scar & Keloid 0.1
Urinary & Reproductive	6%	1.5	Gynaecological 0.8; Urinary Condition 0.6; Urology 0.0; Male Condition 0.0
Pain Relief	6%	1.4	Muscular Pain 1.3; Mouth Pain 0.1; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovenia Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	1%	0.4	Not available
Mouth Treatment	1%	0.3	Other Mouth Treatment 0.2; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.2	Antihemorrhoids 0.2; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	1%	0.2	Not available
Other Miscellaneous	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovenia Medical Devices Performance by top CHC 2 Segments

CCR makes up about 42% of all volume sales of medical devices

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**1.9**	
Eye Care	29%	0.6	Not available
CCR	42%	0.8	Sore Throat 0.5; Nasal Saline 0.3; Cough 0.0; Cold Remedies 0.0
Digestive	10%	0.2	Laxatives 0.1; Acid & Heartburn 0.0; Digestive 0.0; Antidiarrhoeals 0.0
Skin Care	7%	0.1	Wound Healing 0.1; Hand Skin 0.0; Wound Disinfect 0.0; Wart/Corn Removal 0.0; Antifungals 0.0
Urinary & Reproductive	4%	0.1	Gynaecological 0.1; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	4%	0.1	Muscular Pain 0.1; Mouth Pain 0.0; Dysmenorrhea 0.0; Joint Care 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Slovenia Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	2%	0.0	Not available
Mouth Treatment	1%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Circulatory	1%	0.0	Antihemorrhoids 0.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

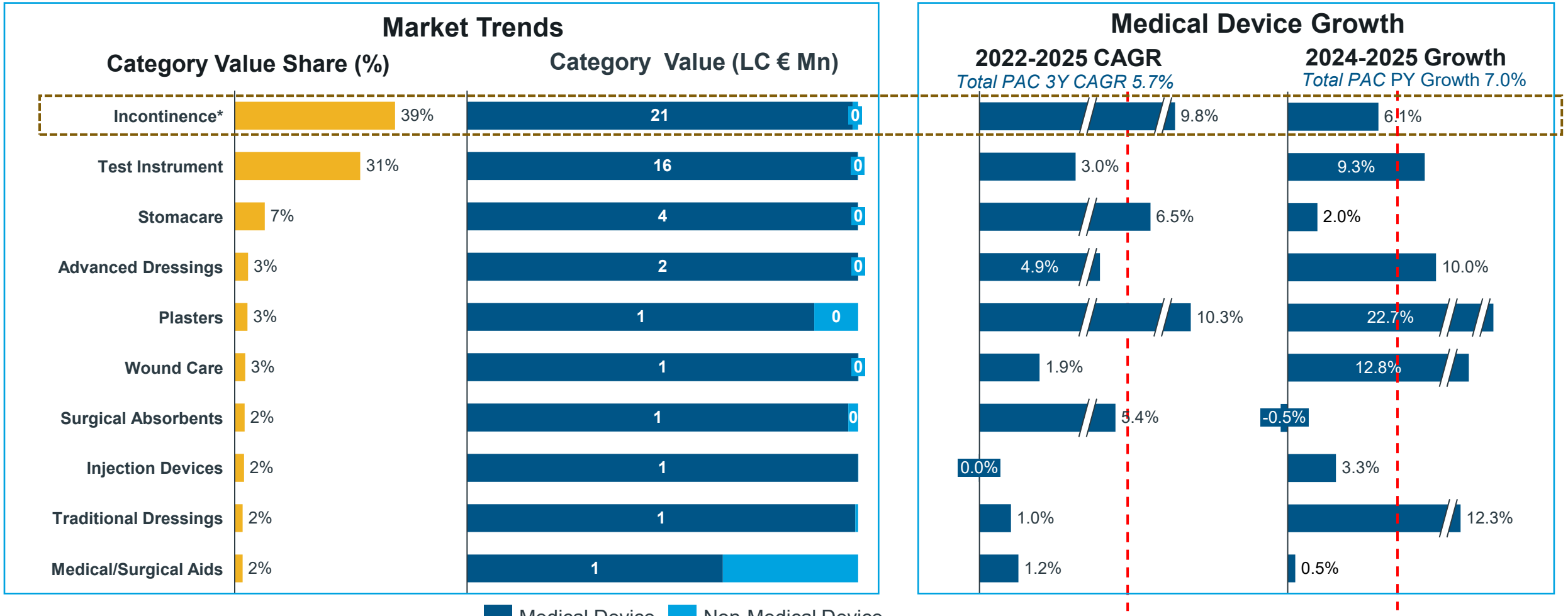
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Slovenia PAC Performance by CHC 1 Category in 2025 (1/2)

*Incontinence leads medical devices values with **€21 Mn** sales*

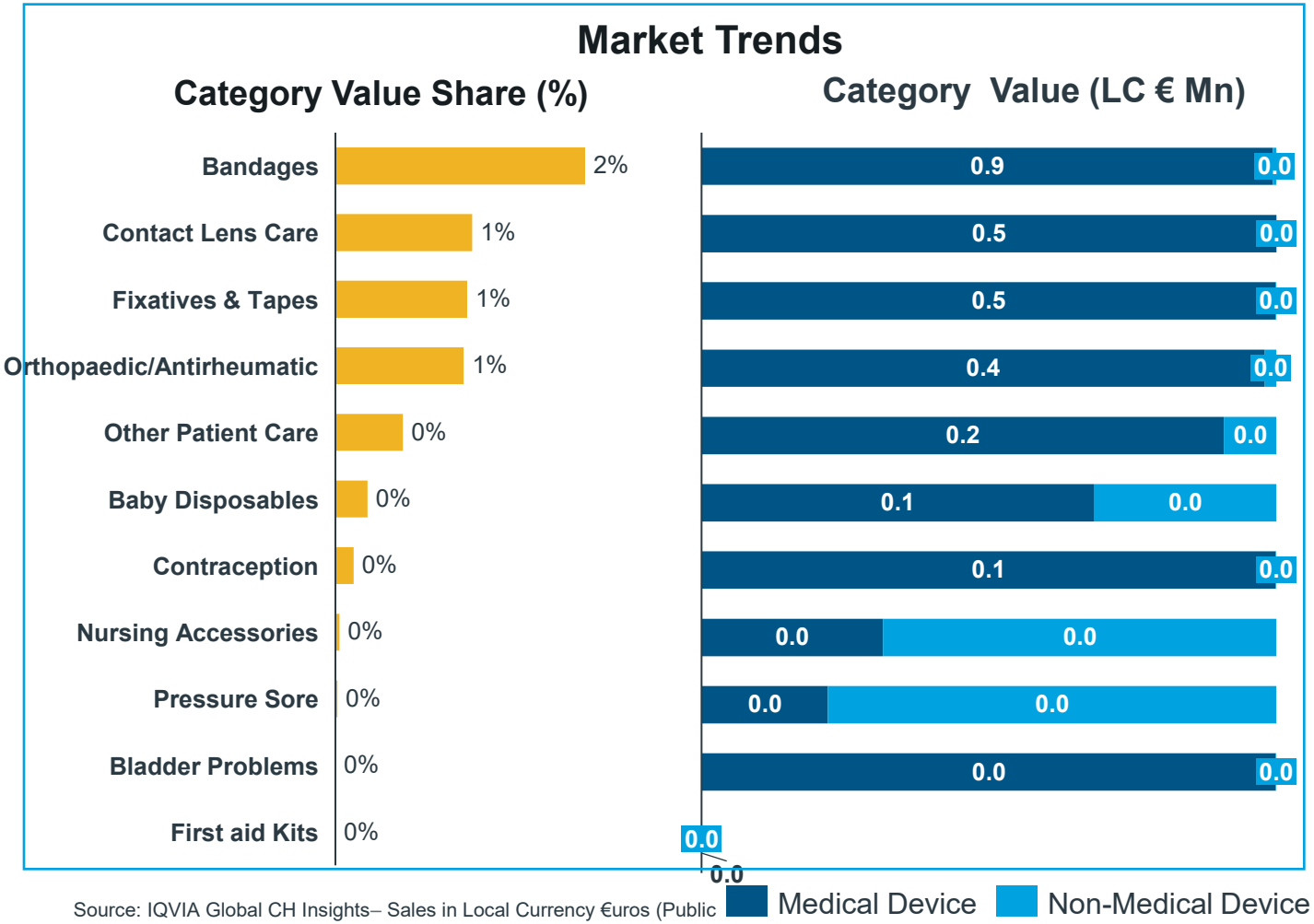


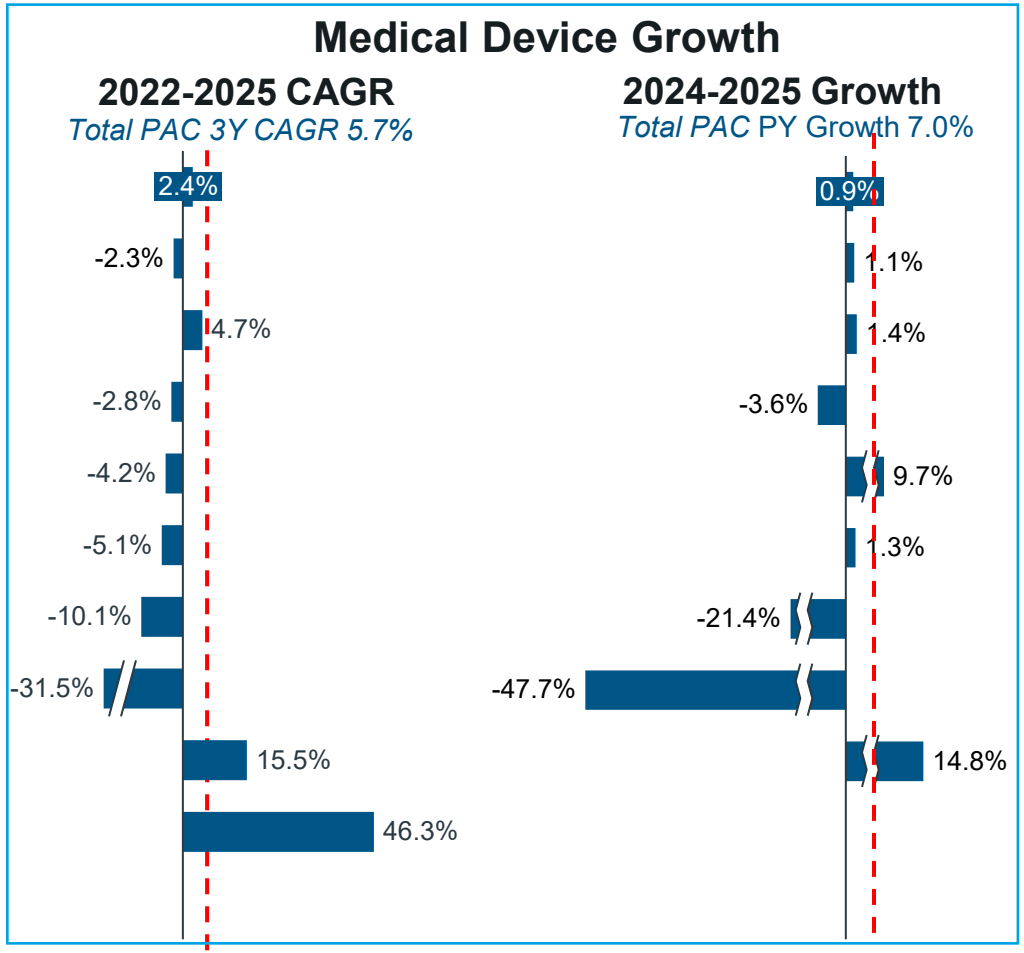
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

*Test instruments include both test and measuring instruments; L-T – Long term ; S-T – Short term

Slovenia PAC Performance by CHC 1 Category in 2025 (2/2)

Pressure Sore and bladder problems shows S-T and L-T value growth in the medical devices segment





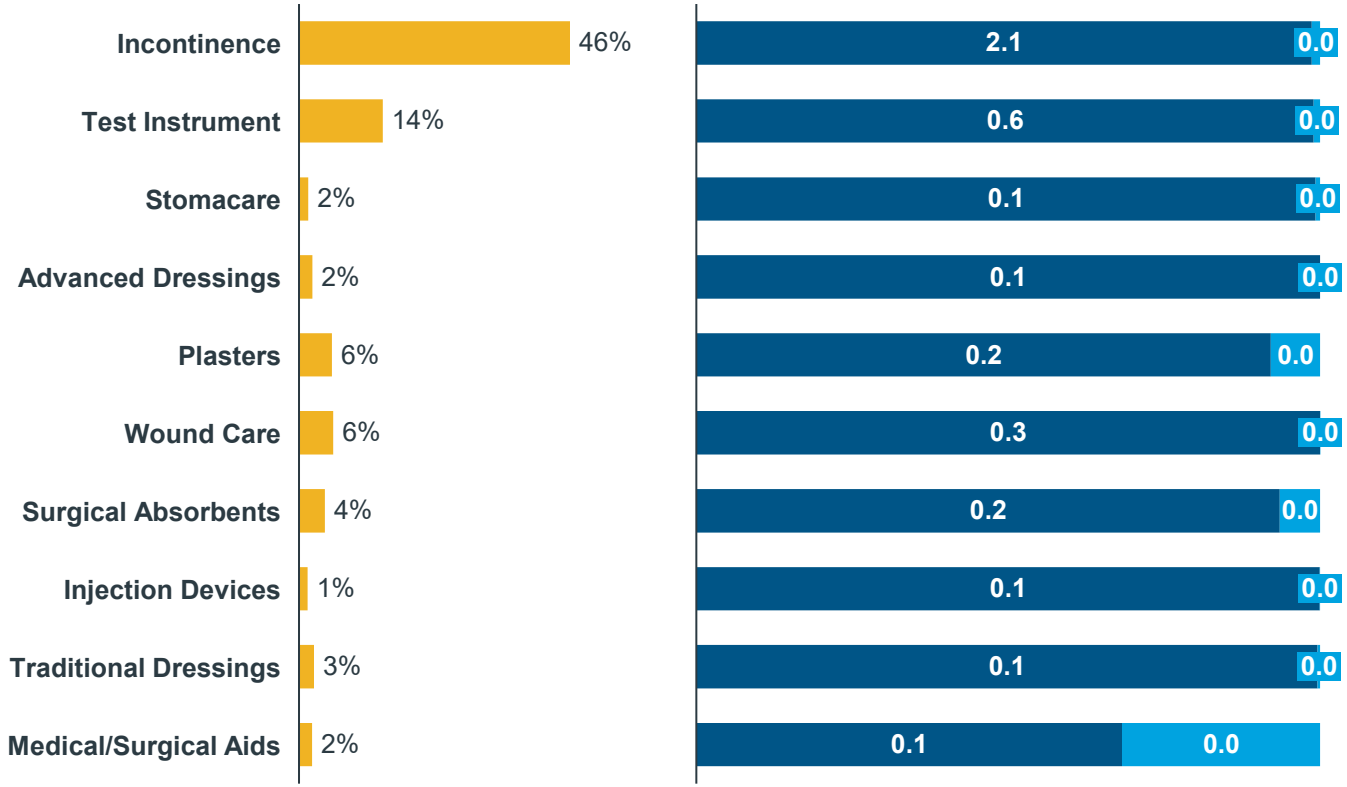
Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; S-T – Short term

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded

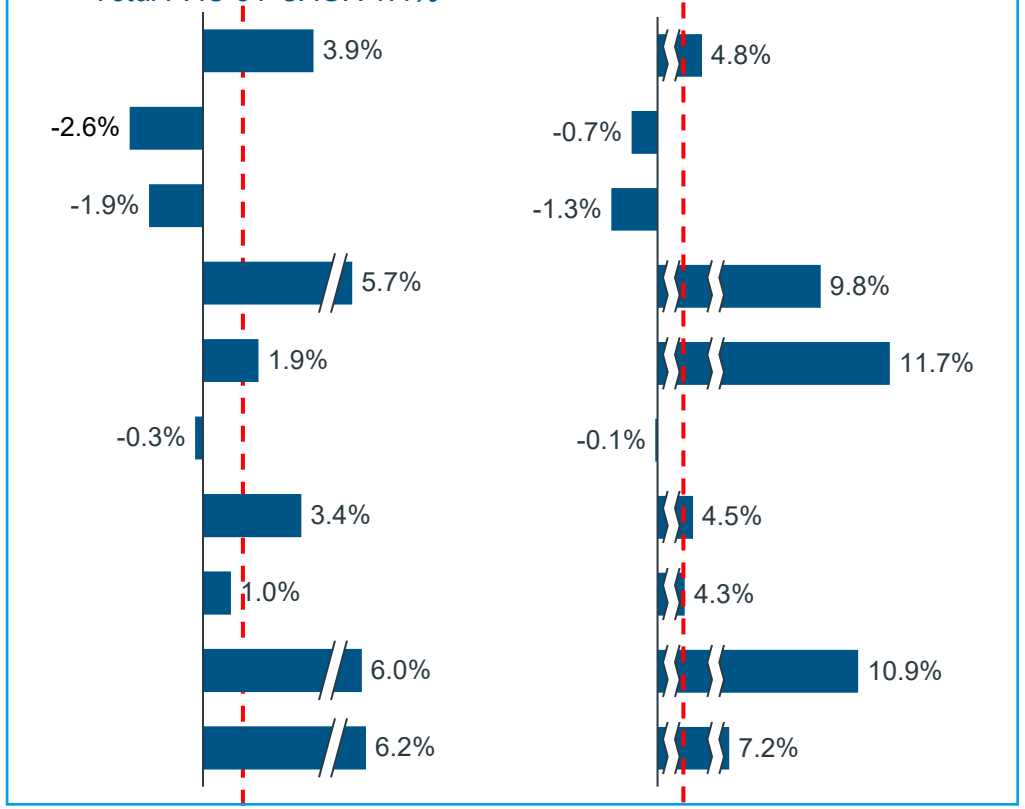
Slovenia PAC Performance by CHC 1 Category (2/2)

Incontinence leads in medical devices volume shares as well

Market Trends



Medical Device Growth



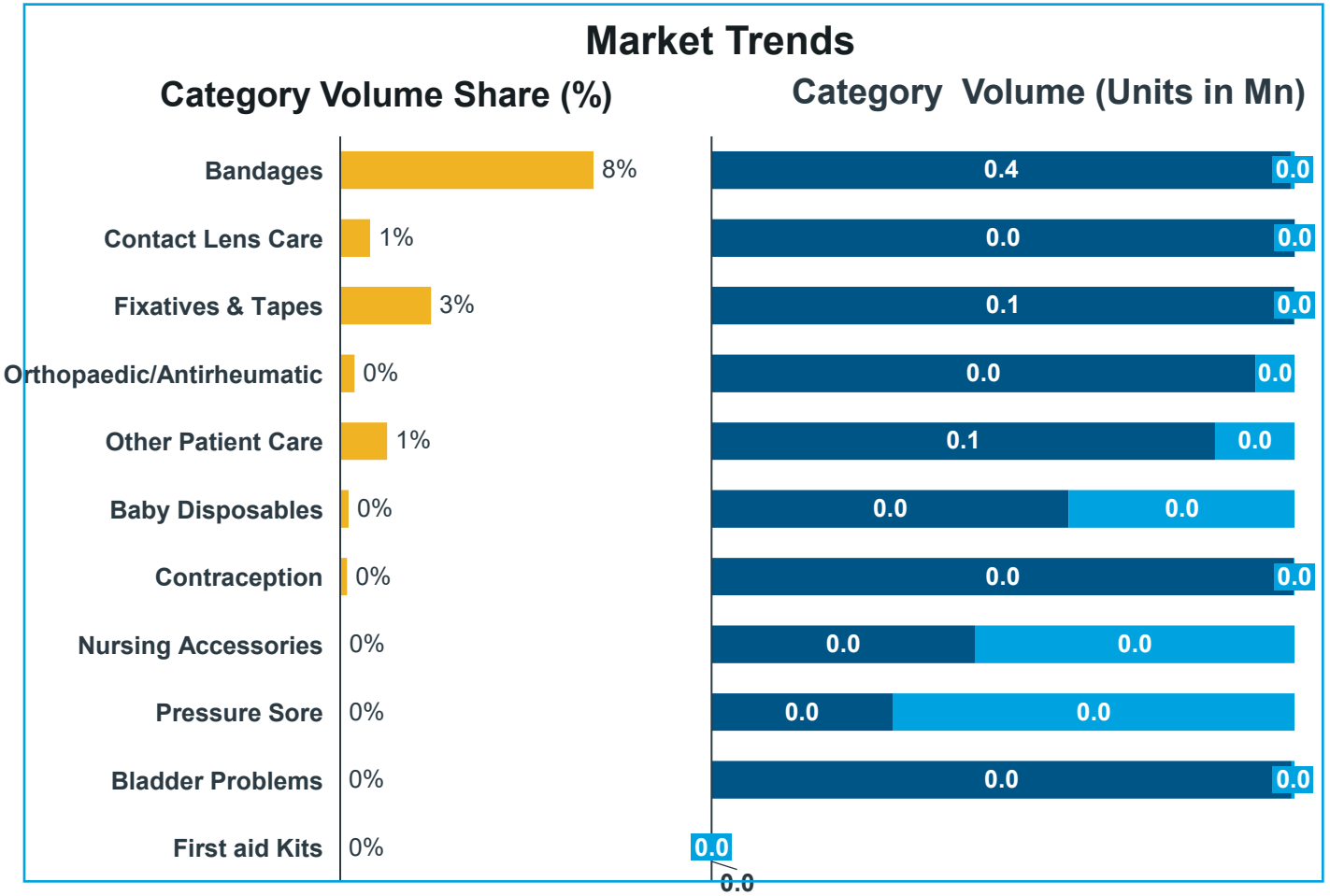
Medical Device | Non-Medical Device

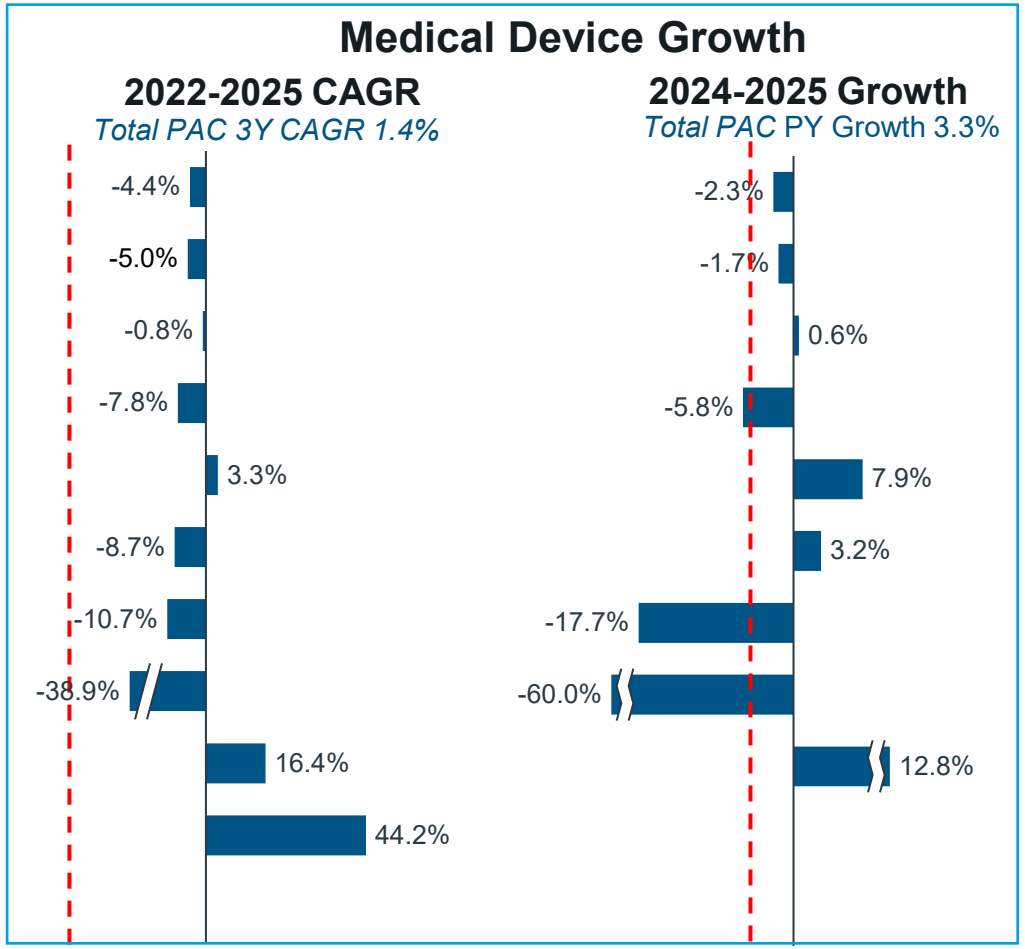
Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Slovenia PAC Performance by CHC 1 Category (2/2)

Pressure Sore, bladder problems and other categories show both S-T and L-T volume growth too





Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

*Categories with <1% share such as wound care, stomacare, contraception, first aid kits, contact lenses & glasses include products for contact lens care, baby disposables and pressure sore are excluded
S-T – Short term

Slovenia Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 85% of values; dominated by incontinence and test instruments

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PAC- Medical Devices		**52.2**	
Incontinence	39%	20.6	Mod Heav Sev Incont. 12.4; Light Incontinence 7.4; Bed Sheets/Pads 0.6; Other Incontinence Prds 0.3
Test Instrument	31%	16.3	Gluc Measuring 13.3; Pregnancy Test 0.7; Blood Press Monitors 0.6; Lancets+Sampling 0.6
Stomacare	7%	3.9	Ileo-Colo+Urostomy 3.7; Stomacare Acces. 0.1; Stomacare Protectives 0.1
Advanced Dressings	3%	1.7	Hyaluron 1.0; Base Tech 0.6; Anti-Infection 0.1; Other 0.0
Plasters	3%	1.5	Special Plaster 0.5; Plaster Strip 0.5; Liquid Plaster 0.4; Plaster Spec. Uses 0.0
Wound Care	3%	1.4	Not available

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;
** Top 6 categories based on their Medical devices value sales (in descending order)*
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products
Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Slovenia Medical Devices Performance by top CHC 2 Segments

Incontinence supplies account for nearly half the total volume sales of medical devices

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PAC- Medical Devices		**4.5**	
Incontinence	47%	2.1	Light Incontinence 1.1; Mod Heav Sev Incont. 0.9; Bed Sheets/Pads 0.1; Other Incontinence Prds 0.0
Test Instrument	14%	0.6	Gluc Measuring 0.4; Lancets+Sampling 0.1; Pregnancy Test 0.1; Thermometers 0.0
Stomacare	2%	0.1	Ileo-Colo+Urostomy 0.1; Stomacare Protectives 0.0; Stomacare Acces. 0.0
Advanced Dressings	2%	0.1	Hyaluron 0.1; Base Tech 0.0; Anti-Infection 0.0; Other 0.0
Plasters	5%	0.2	Plaster Strip 0.1; Special Plaster 0.1; Liquid Plaster 0.0; Plaster Spec. Uses 0.0
Wound Care	6%	0.3	Not available

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

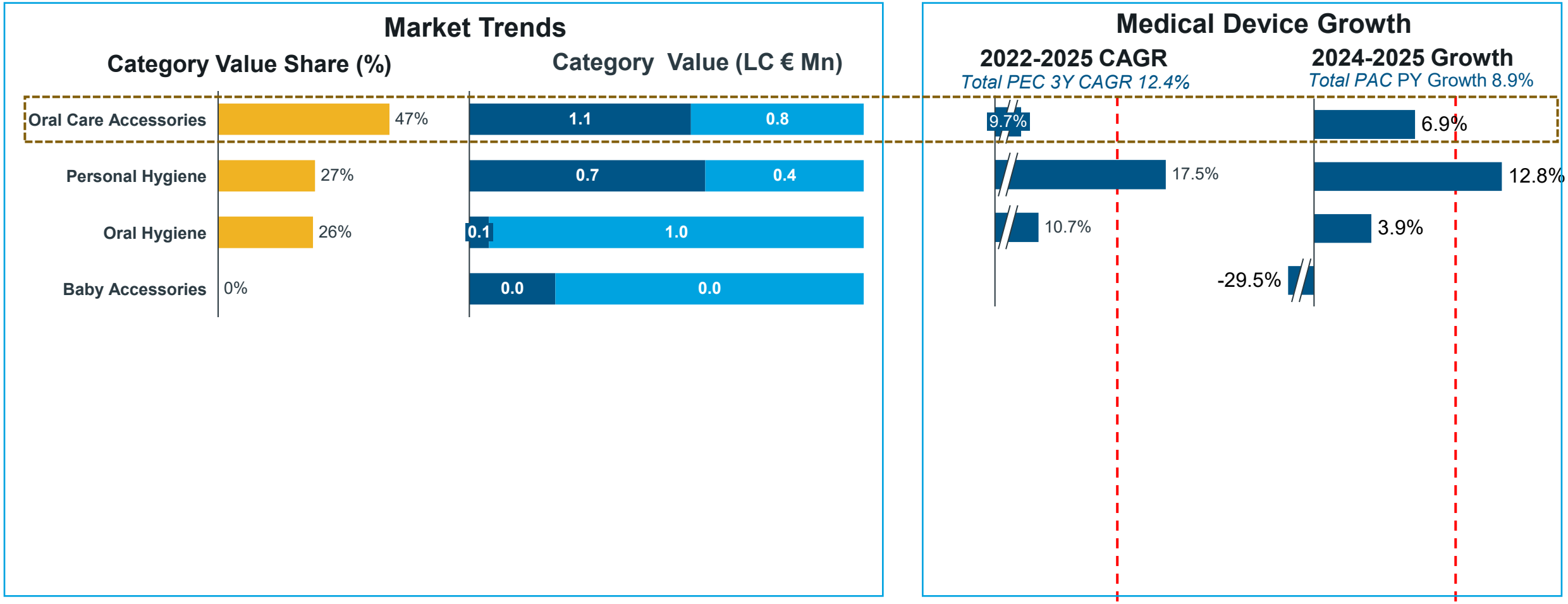
^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Mod Heav Sev Incont. : Moderate Heavy Severe Incontinence products

Base Technology - include hydrogel / hydrocolloid / alginate / foam / carbon / semi permeable / contact layer wound healing dressings

Slovenia PEC Performance by CHC 1 Category

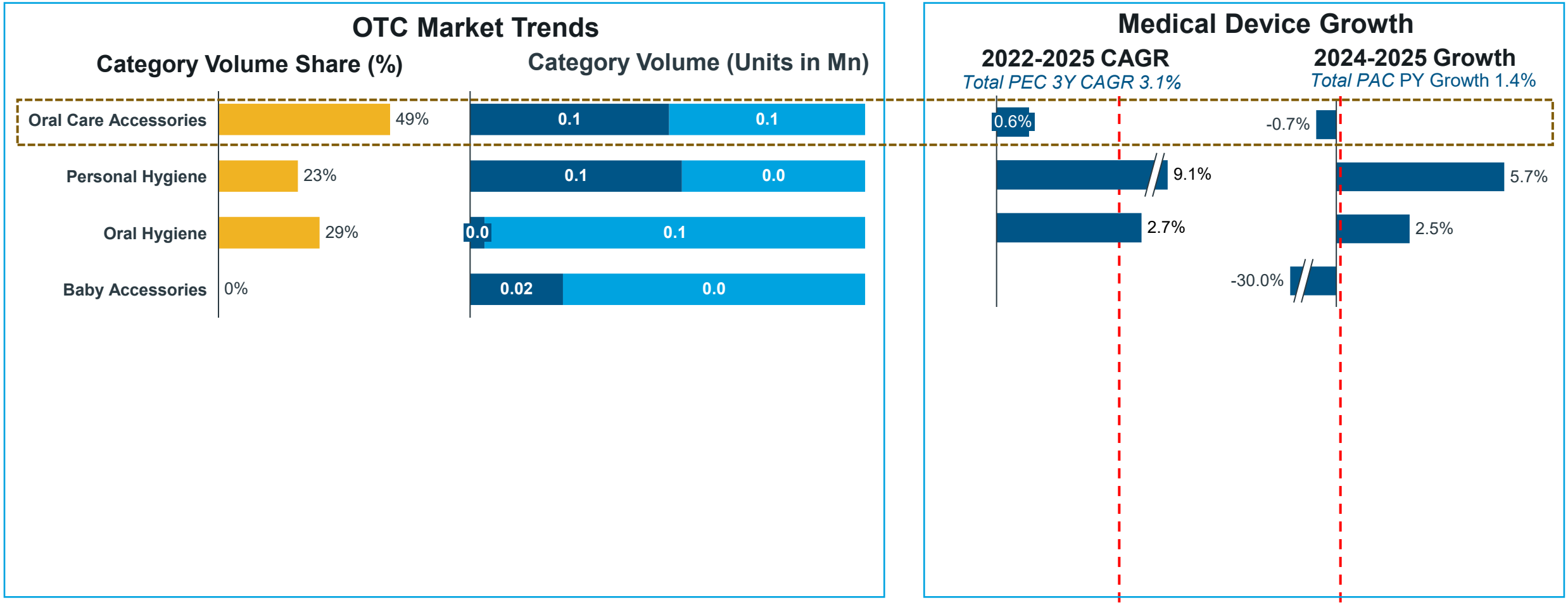
Oral care accessories leads medical devices values; showing positive growth in L-T & S-T



Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025;

Portugal PEC Performance by CHC 1 Category

Oral care accessories continues to lead in volumes within the medical devices segment as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025 L-T – Long term; S-T – Short term

Slovenia Medical Devices Performance by top CHC 2 Segments

Oral care accessories hold the largest value share led by Denture products

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
PEC- Medical Devices		**1.8**	
Oral Care Accessories	61%	1.1	Denture Products 1.1; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Floss 0.0
Personal Hygiene	36%	0.7	Intimate Hygiene 0.7; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Hygiene	3%	0.1	Toothpastes 0.0; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Local Currency €uros (Public Prices) based on MAT Q2 2025;

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Slovenia Medical Devices Performance by top CHC 2 Segments

Oral Care Accessories share the largest volume of medical devices as well

CHC 1 Category*	CHC 1 Volume share (%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
PEC- Medical Devices		**0.2**	
Oral Care Accessories	65%	0.1	Denture Products 0.1; Other Oral Care Acces. 0.0; Toothbrushes 0.0; Dental Floss 0.0
Personal Hygiene	32%	0.1	Intimate Hygiene 0.1; Hand Hygeine w/o Soap 0.0; Foot Hygiene 0.0
Oral Hygiene	3%	0.0	Toothpastes 0.0; Other Oral Care 0.0; Mouthwashes 0.0
Baby Accessories	0%	0.0	Dummies/Pacifiers/Teeth 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** All categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

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Ireland Medical Devices – Market Dynamics

Ireland Medical Devices Performance Overview

Medical device segment records strong value and volume growth, in both L-T and S-T

14%

Medical device share of total CH value in 2025

Long –term Growth

6.1% by value

3.8% by volume

Short –term Growth

6.4% by value

5.5% by volume

Medical Devices – €61 Mn (2025)

100% OTC value share

Long-term Growth (Value)

6.1% OTC

#PEC and PAC not covered

Medical Devices Categories

Eye care

48% *Share for total OTC value in 2025, Dominated by **Nasal Saline***

Long-term Growth

7.0% by value

OTC (Over-the-Counter)

15%

Contribution to total new pack launches in last 3 years

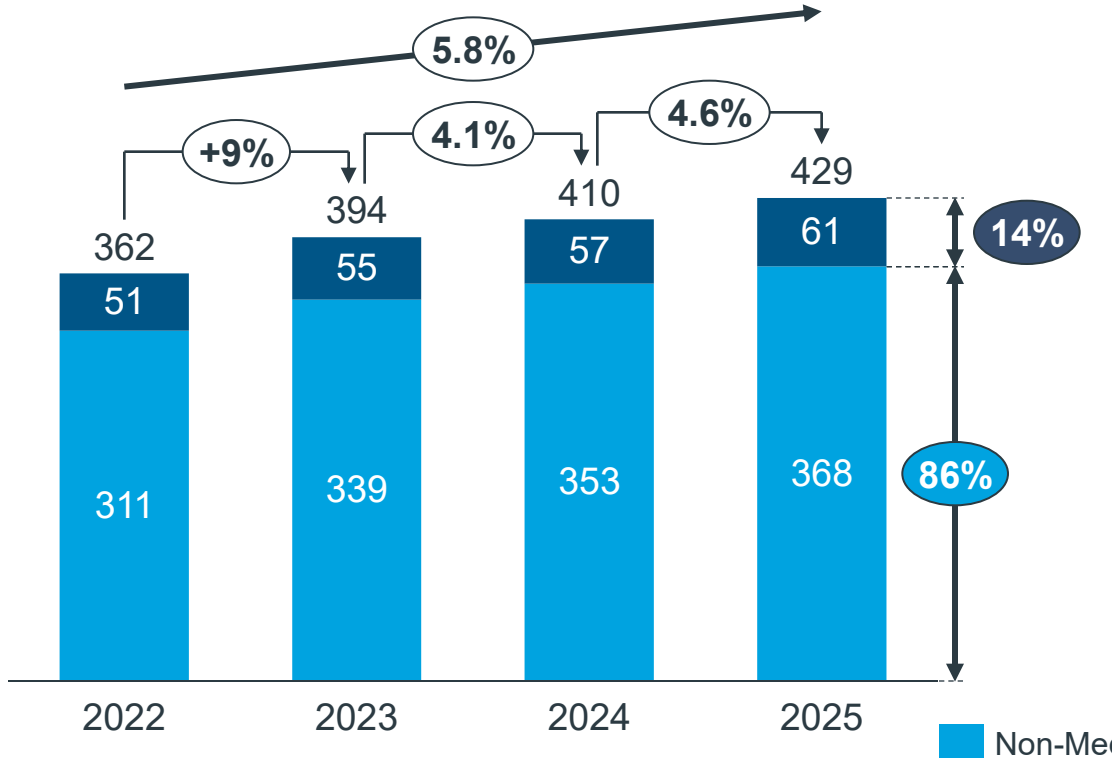
Medical Devices Innovation

Source: IQVIA Global CH Insights - MAT Q2 2025

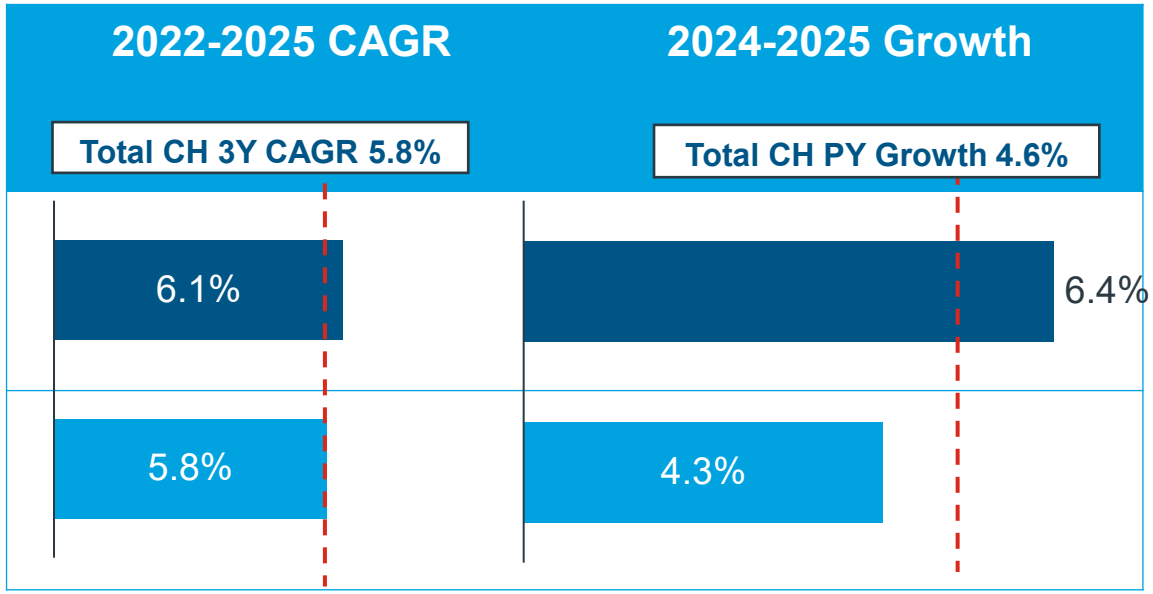
Ireland CH Market Size & Growth

The CH market has grown at 5.8% between 2022 and 2025, with the medical devices segment reaching a value of €61 Mn in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

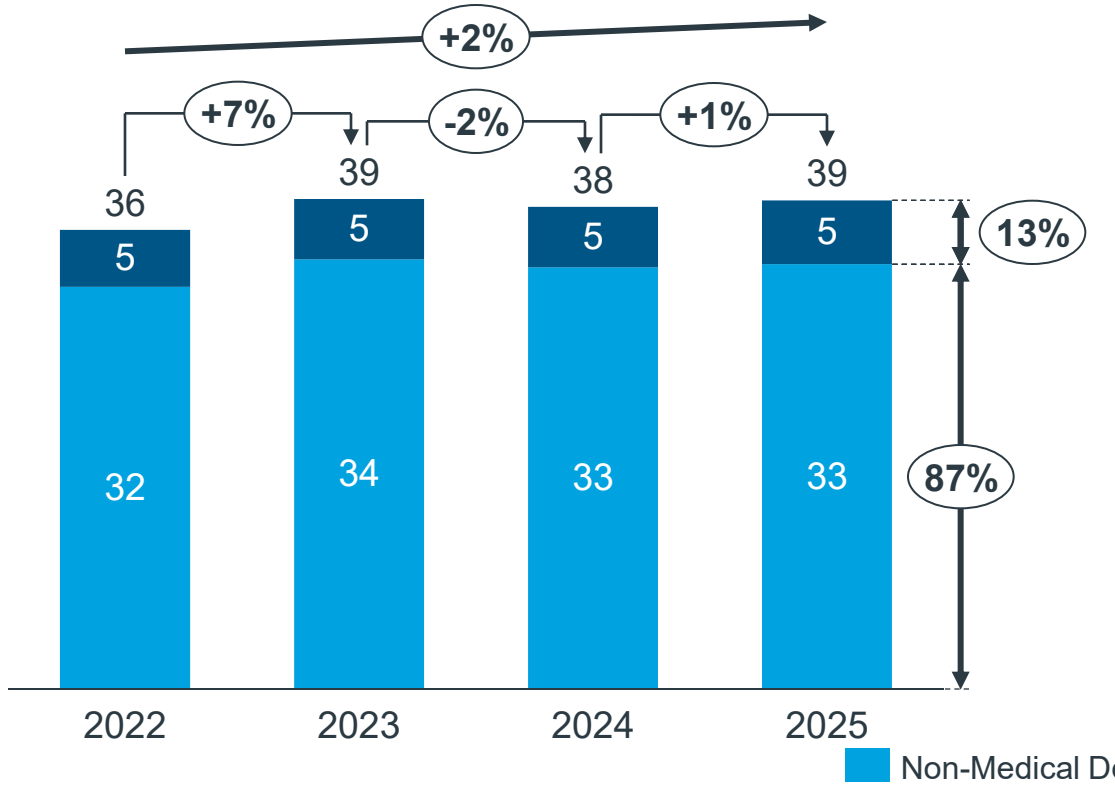


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

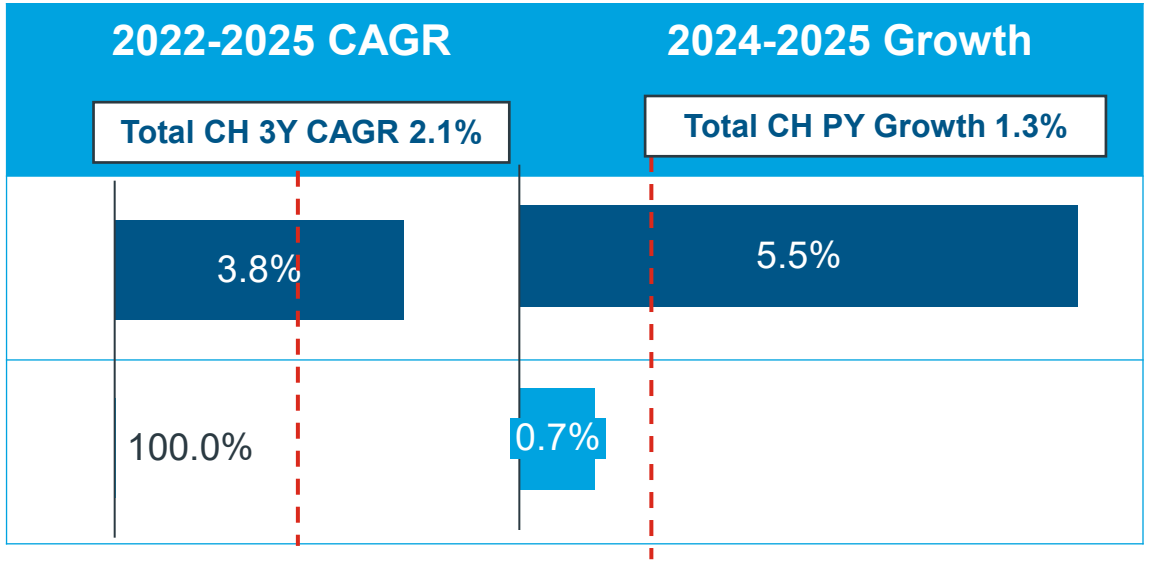
Ireland CH Market Volume & Growth

Medical devices account for 13% of the CH market volume, while the overall market has grown by 2% between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Ireland CH Performance by Classes

Medical device segment grows better than the non-medical device segment in both the S-T and L-T

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR Total CH 3Y CAGR 5.8%	2024-2025 Growth Total CH PY Growth 4.6%
OTC	100%	61 / 368 / 429	6.1% / 5.8%	6.4% / 4.3%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Ireland CH Performance by Classes

Medical device segment grows better than the non-medical device segment in both the S-T and L-T in volume

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
			Total CH 3Y CAGR 2.1%	Total CH PY Growth 1.3%
OTC	100%	5 / 33 / 39	3.8% / 1.8%	5.5% / 0.7%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Ireland Medical Devices Packs & New Launches

Medical device new launches account for 14% of the overall launches

Category	Total Packs*	New Launches**
CH Total	184 / 919 / **1,103**	33 / 190 / **223**
OTC	184 / 919 / **1,103**	33 / 190 / **223**

Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

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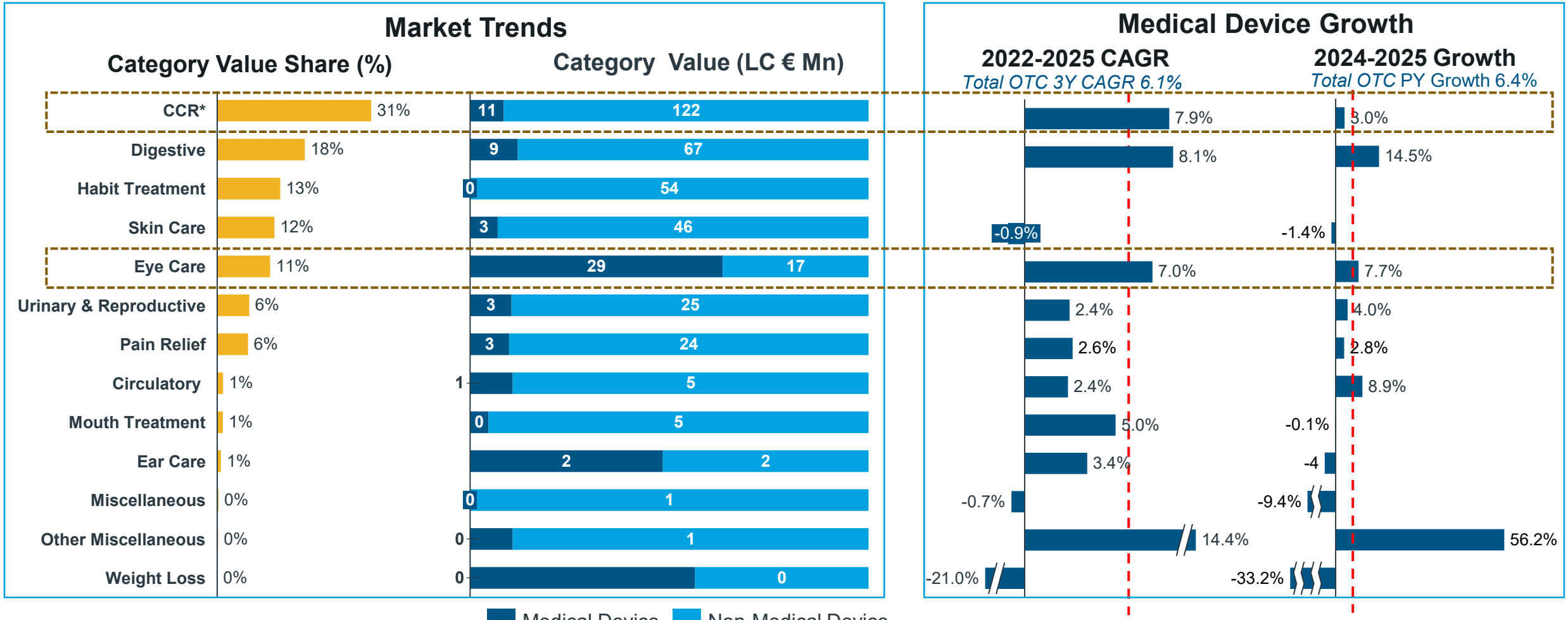
Ireland OTC Performance by CHC 1 Category in 2025

Eye care contributes to the highest value under medical devices segment at ***€ 29 Mn***

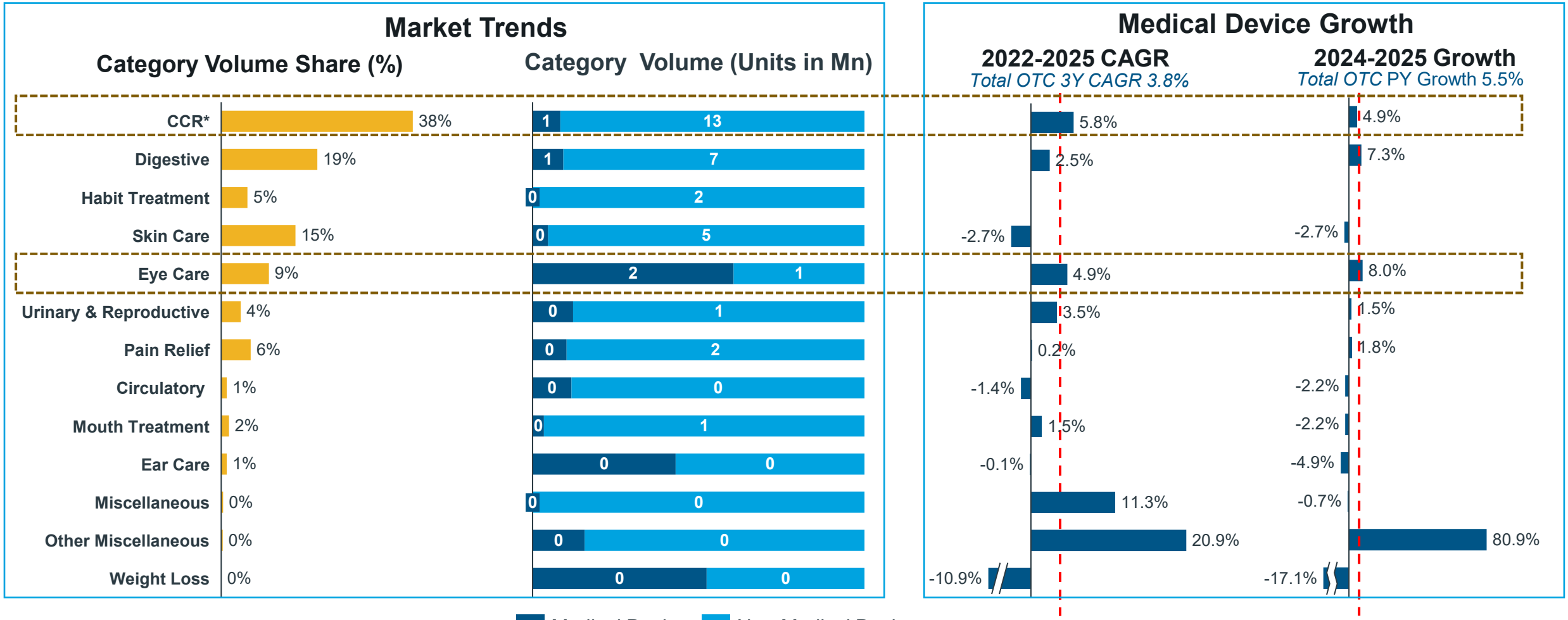


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Ireland OTC Performance by CHC 1 Category in 2025

Eye care holds the largest volume share in the medical devices category as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Ireland Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 95% of values; led by Ear care with 48% value share, followed by Nasal saline in CCR

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**60.8**	
Eye Care	48%	29.0	Not available
CCR	19%	11.3	Nasal Saline 5.8; Sore Throat 3.6; Cough 1.2; Cold Remedies 0.6
Digestive	15%	9.1	Laxatives 5.1; Acid & Heartburn 2.0; Digestive 1.8; Antidiarrhoeals 0.2
Skin Care	6%	3.4	Skin Protector/Emollients 1.2; Wart/Corn Removal 1.0; Psoriasis 0.5; Hand Skin Wound Disinfect 0.4
Urinary & Reproductive	5%	2.9	Gynaecological 2.0; Urinary Condition 0.7; Urology 0.2; Male Condition 0.0
Pain Relief	4%	2.6	Muscular Pain 2.3; Mouth Pain 0.3; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Ireland Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	1.6	Not available
Circulatory	1%	0.5	Antihemorrhoids 0.5; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.2	Other Mouth Treatment 0.2; Mouth Infection 0.0
Weight Loss	0%	0.1	Not available
Other Miscellaneous	0%	0.1	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Ireland Medical Devices Performance by top CHC 2 Segments

Eyecare leads in highest volumes as well, followed by Nasal saline leads in CCR

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**5.0**	
Eye Care	44%	2.2	Not available
CCR	24%	1.2	Nasal Saline 0.6; Sore Throat 0.4; Cough 0.1; Cold Remedies 0.0
Digestive	13%	0.7	Laxatives 0.4; Acid & Heartburn 0.2; Digestive 0.1; Antidiarrhoeals 0.0
Skin Care	5%	0.3	Skin Protector/Emollients 0.1; Wart/Corn Removal 0.1; Psoriasis 0.0; Hand Skin Wound Disinfect 0.0
Urinary & Reproductive	4%	0.2	Gynaecological 0.1; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	5%	0.2	Muscular Pain 0.2; Mouth Pain 0.0; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Ireland Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	4%	0.2	Not available
Circulatory	1%	0.0	Antihemorrhoids 0.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

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Lithuania Medical Devices – Market Dynamics

Lithuania Medical Devices Performance Overview

Medical devices segment records strong growth in L-T and S-T

17%

Medical device share of total CH value in 2025

Long –term Growth

11.9% by value

3.9% by volume

Short –term Growth

13.6% by value

7.5% by volume

Medical Devices – €55 Mn (2025)

100% OTC Value Share

Long-term Growth (Value)

11.9% **OTC**

#PEC and PAC not covered

Medical Devices Categories

Eye care

34% *Share for total OTC value in 2025*

Long-term Growth

20.8% by value

OTC (Over-the-Counter)

12%

Contribution to total new pack launches in last 3 years

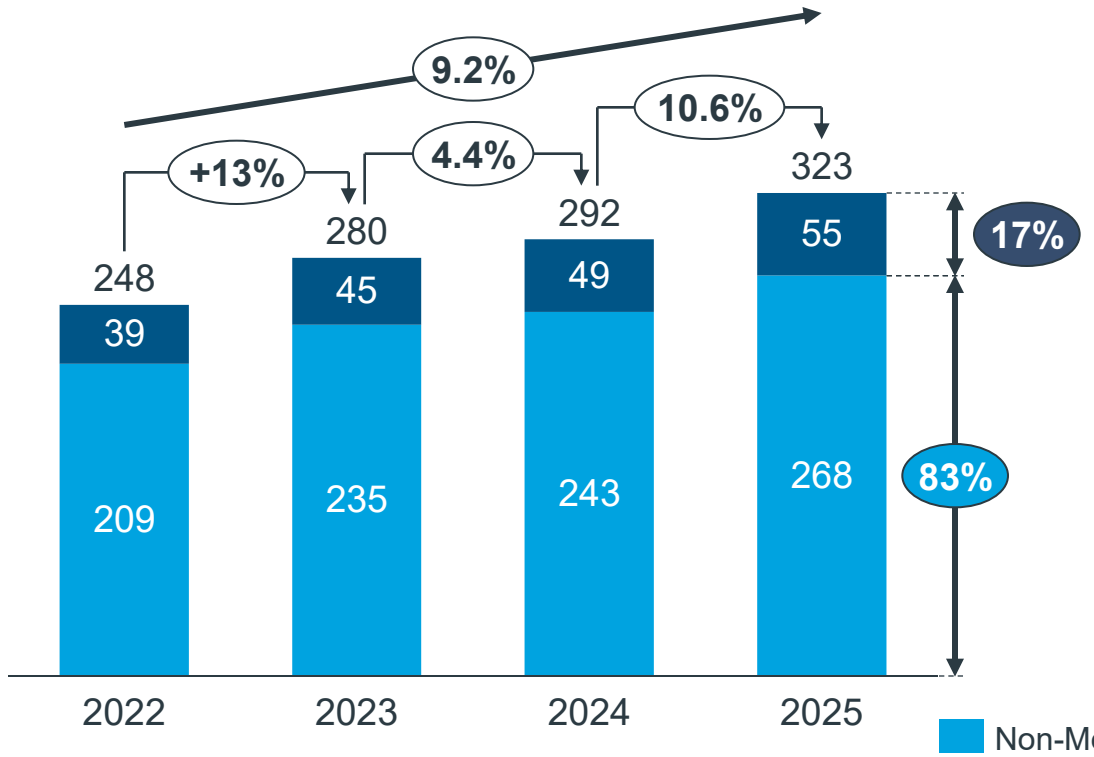
Medical Devices Innovation

Source: IQVIA Global CH Insights - MAT Q2 2025

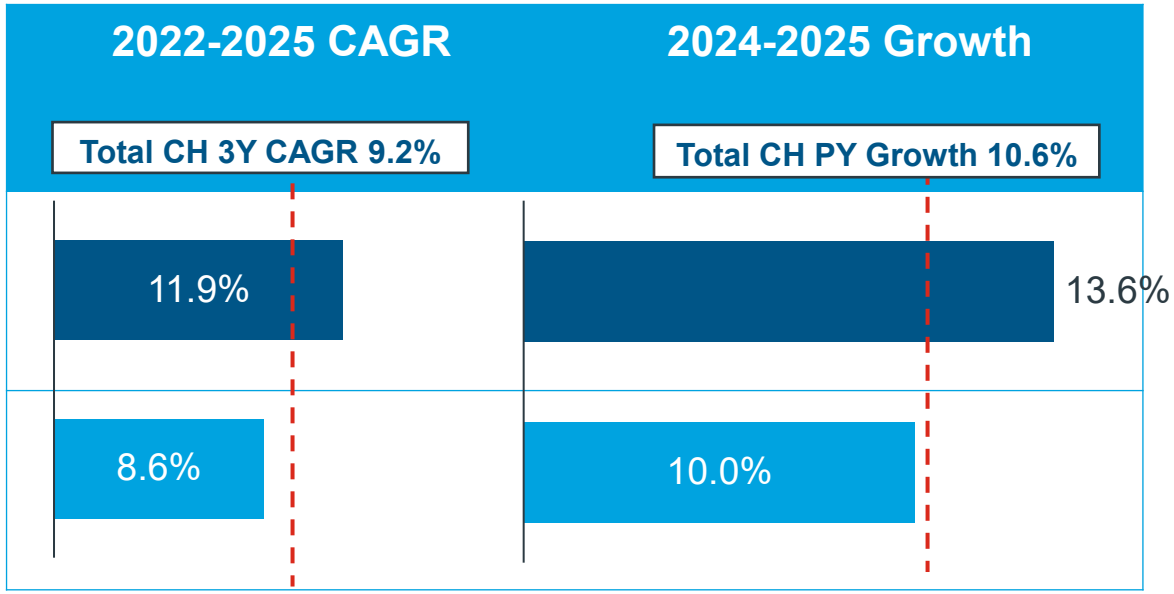
Lithuania CH Market Size & Growth

The CH market has grown at 9.2% between 2022 and 2025, with the medical devices segment reaching a value of €55 Mn in 2025

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

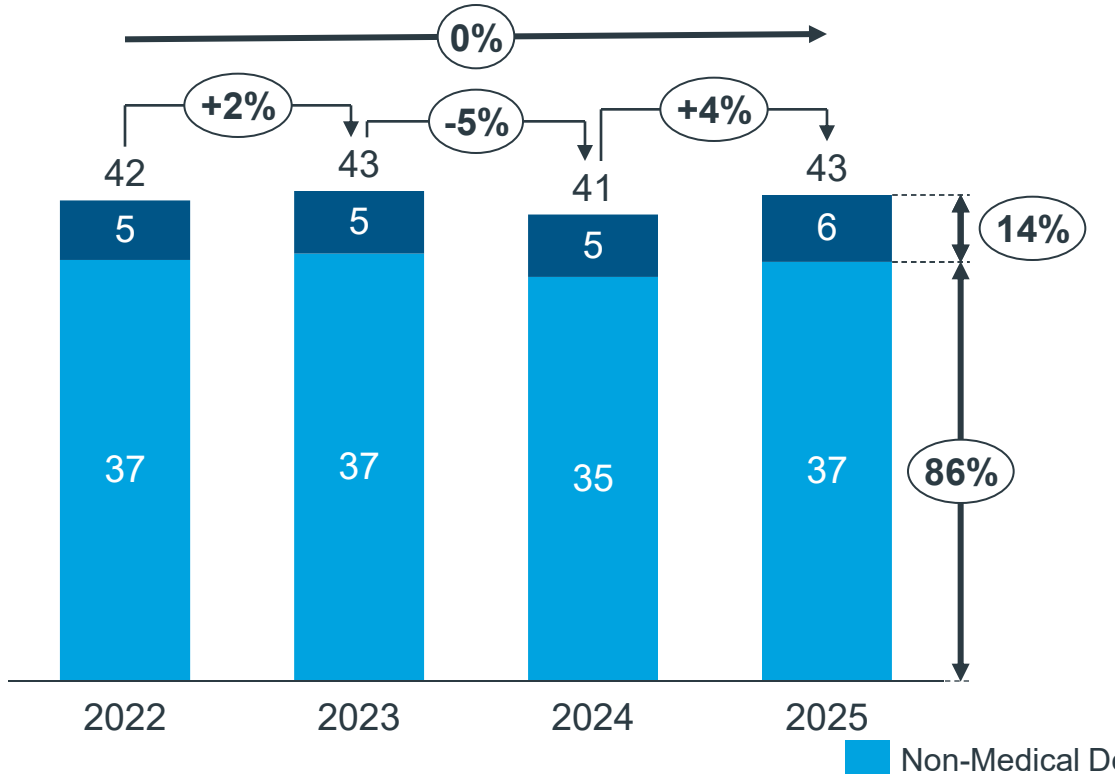


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

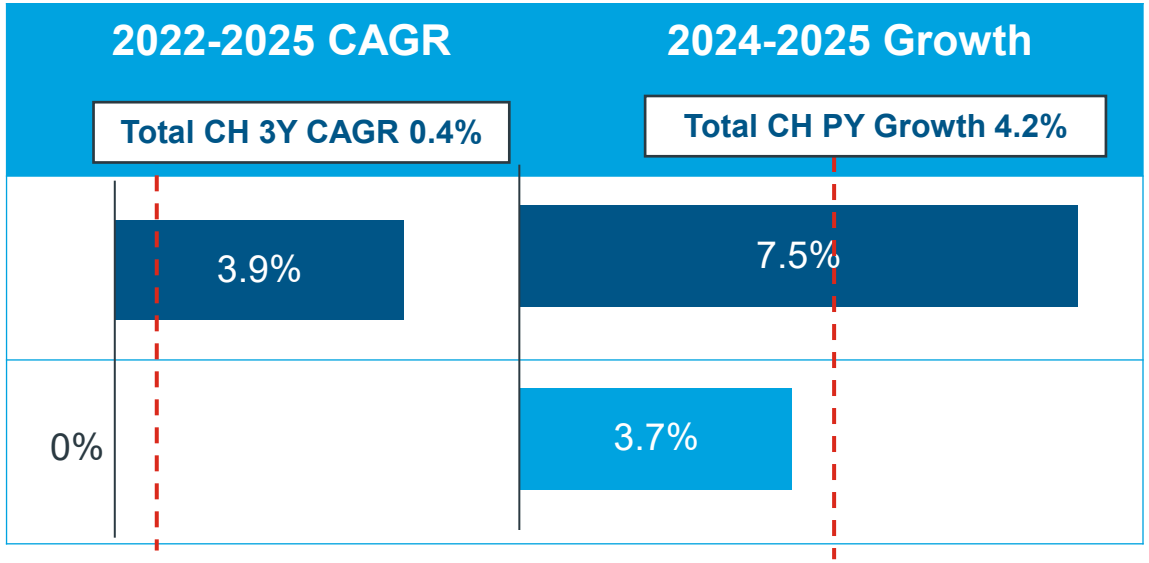
Lithuania CH Market Volume & Growth

Medical devices account for 14% of the CH market volume, while the overall market has shown a flat trend between 2022 and 2025

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Lithuania CH Performance by Classes

Medical device segment grows better than the non-medical device segment in both the S-T and L-T

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR	2024-2025 Growth
			Total CH 3Y CAGR 9.2%	Total CH PY Growth 10.6%
OTC	100%	55 / 268 / 323	11.9% / 8.6%	13.6% / 10.0%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Lithuania CH Performance by Classes

Medical device segment grows better than the non-medical device segment in both the S-T and L-T in volumes

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
			Total CH 3Y CAGR 0.4%	Total CH PY Growth 4.2%
OTC	100%	6 / 37 / 43	-0.1% / 3.9%	7.5% / 3.7%

Medical Device | Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter, PEC – Personal care, PAC – Patient care

Lithuania Medical Devices Packs & New Launches

Medical device new launches account for 12% of the overall launches

Category	Total Packs*			New Launches**		
CH Total	225	1,345	**1,570**	58	422	**480**
OTC	225	1,345	**1,570**	58	422	**480**

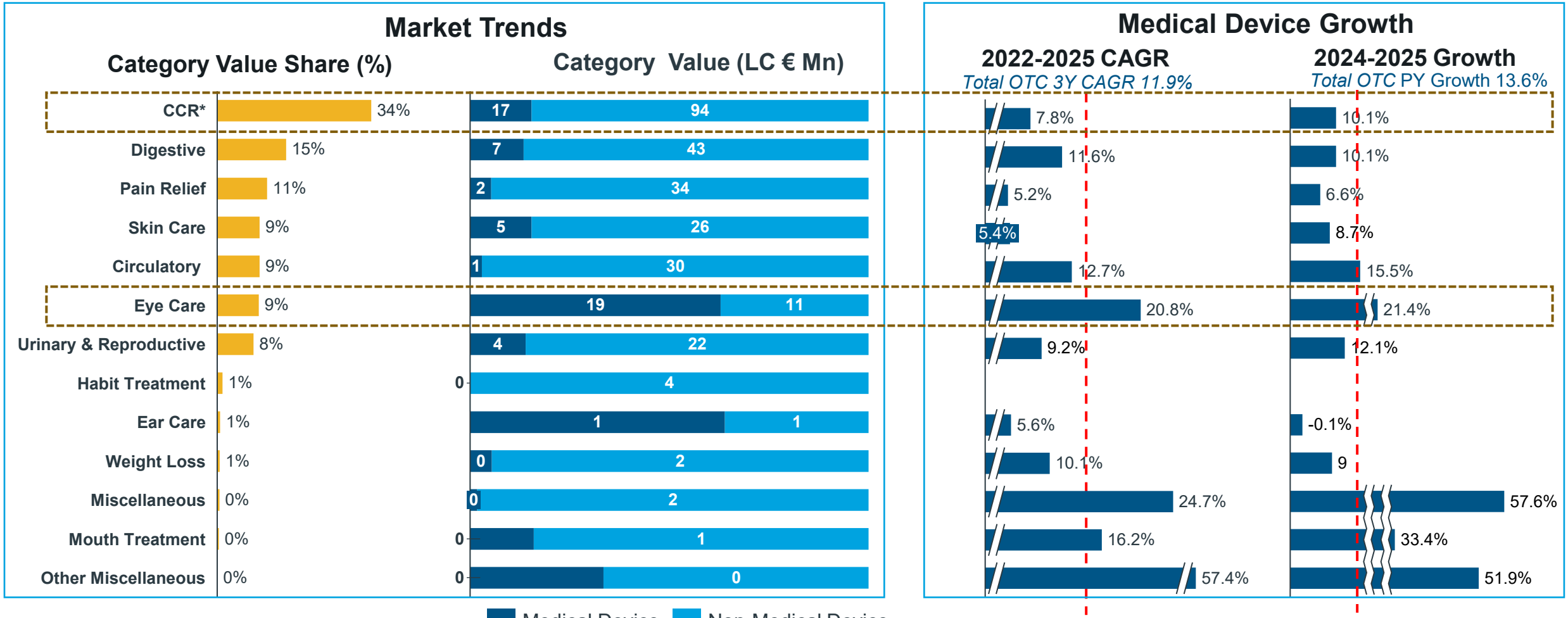
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Lithuania OTC Performance by CHC 1 Category in 2025

Eye care contributes to the highest value under medical devices segment at ***€ 19 Mn***

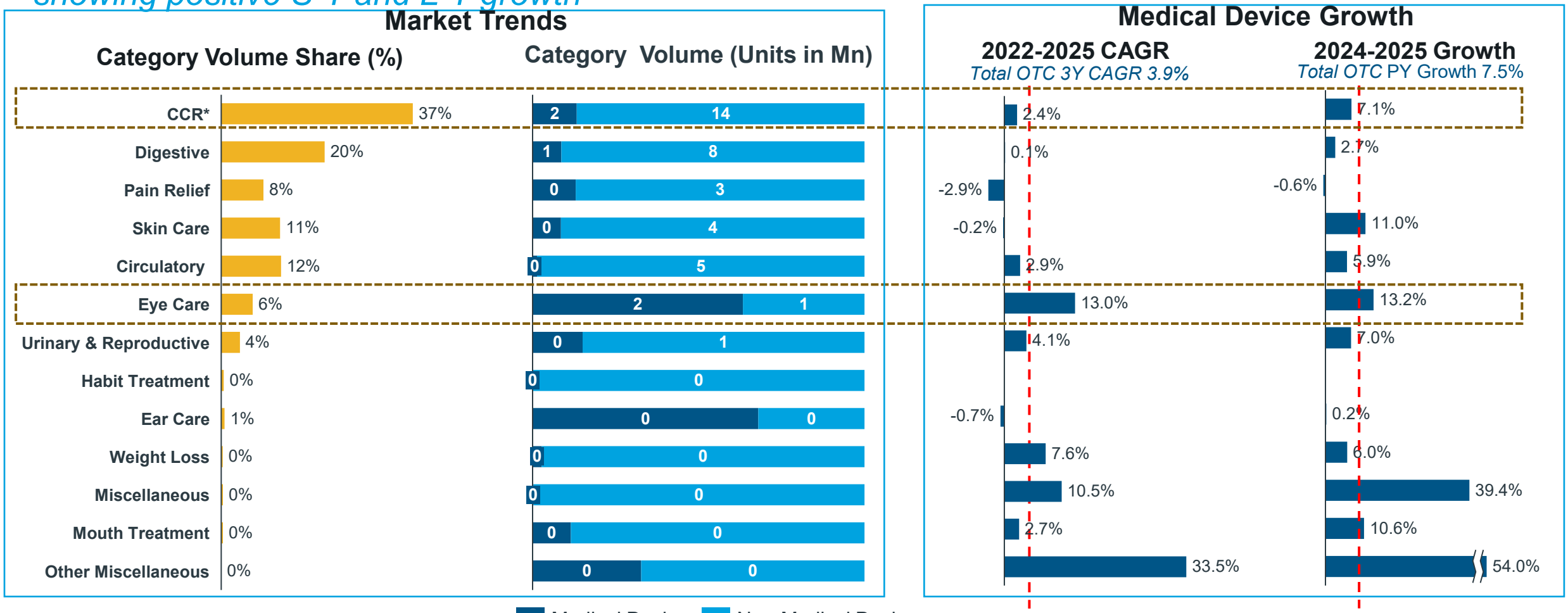


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Lithuania OTC Results for CHC 1 Category in 2025

Eye care shares the same volume of sales as CCR within medical devices segment, while also showing positive S-T and L-T growth



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Lithuania Medical Devices Performance by top CHC 2 Segments

Top 6 categories account for > 95% of values; led by Ear care with 34% value share, followed by Sore throat in CCR

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**55.2**	
Eye Care	34%	18.7	Not available
CCR	31%	17.0	Sore Throat 6.1; Nasal Saline 5.0; Cough 3.6; Other Respiratory 1.1
Digestive	12%	6.6	Acid & Heartburn 2.7; Laxatives 1.8; Digestive 1.6; Antidiarrhoeals 0.5
Skin Care	9%	4.7	Wound Healing 1.5; Skin Protector/Emollients 0.9; Wart/Corn Removal 0.7; Antifungals 0.6
Urinary & Reproductive	7%	3.6	Gynaecological 3.5; Urinary Condition 0.1; Urology 0.0; Male Condition 0.0
Pain Relief	3%	1.9	Muscular Pain 1.1; Mouth Pain 0.8; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Lithuania Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in values

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	2%	1.3	Not available
Circulatory	2%	0.9	Antihemorrhoids 0.8; Chloesterol Regulating 0.0; Other Circulatory 0.1
Mouth Treatment	0%	0.2	Other Mouth Treatment 0.1; Mouth Infection 0.0; Fluoride Products 0.0
Weight Loss	0%	0.1	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Lithuania Medical Devices Performance by top CHC 2 Segments

Eyecare leads in highest volumes as well, followed by Sore throat in CCR

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**5.9**	
Eye Care	28%	1.6	Not available
CCR	36%	2.1	Sore Throat 0.8; Nasal Saline 0.6; Cough 0.4; Other Respiratory 0.2
Digestive	13%	0.7	Digestive 0.3; Acid & Heartburn 0.2; Laxatives 0.1; Antidiarrhoeals 0.1
Skin Care	7%	0.4	Wound Healing 0.1; Skin Protector/Emollients 0.1; Hand Skin Wound Disinfect 0.1; Skin Irritation 0.0
Urinary & Reproductive	4%	0.2	Gynaecological 0.2; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	8%	0.5	Muscular Pain 0.3; Mouth Pain 0.1; Joint Care 0.0; Dysmenorrhea 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Lithuania Medical Devices Performance by top CHC 2 Segments

Mouth treatment and circulatory products account for a very small share in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	3%	0.2	Not available
Circulatory	1%	0.1	Antihemorrhoids 0.1; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Weight Loss	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Nail Biting 0.0; Smoking control 0.0; Other Habit 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

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Latvia Medical Devices – Market Dynamics

Latvia Medical Devices Performance Overview

Medical devices have seen remarkabale growth in the last 3 years in terms of value accounting for €32 Mn of the total CH value

16%

Medical device share of total CH value in 2025

Long –term Growth

8.3% by value

-0.4% by volume

Short –term Growth

8.8% by value

3.1% by volume

Medical Devices – €32 Mn (2025)

100% OTC value share

Long-term Growth (Value)

8.3%

OTC

Medical Devices Categories

CCR

39% *Share for total OTC value in 2025*

Long-term Growth

7.2% by value

OTC (Over-the-Counter)

12%

Contribution to total new pack launches in last 3 years

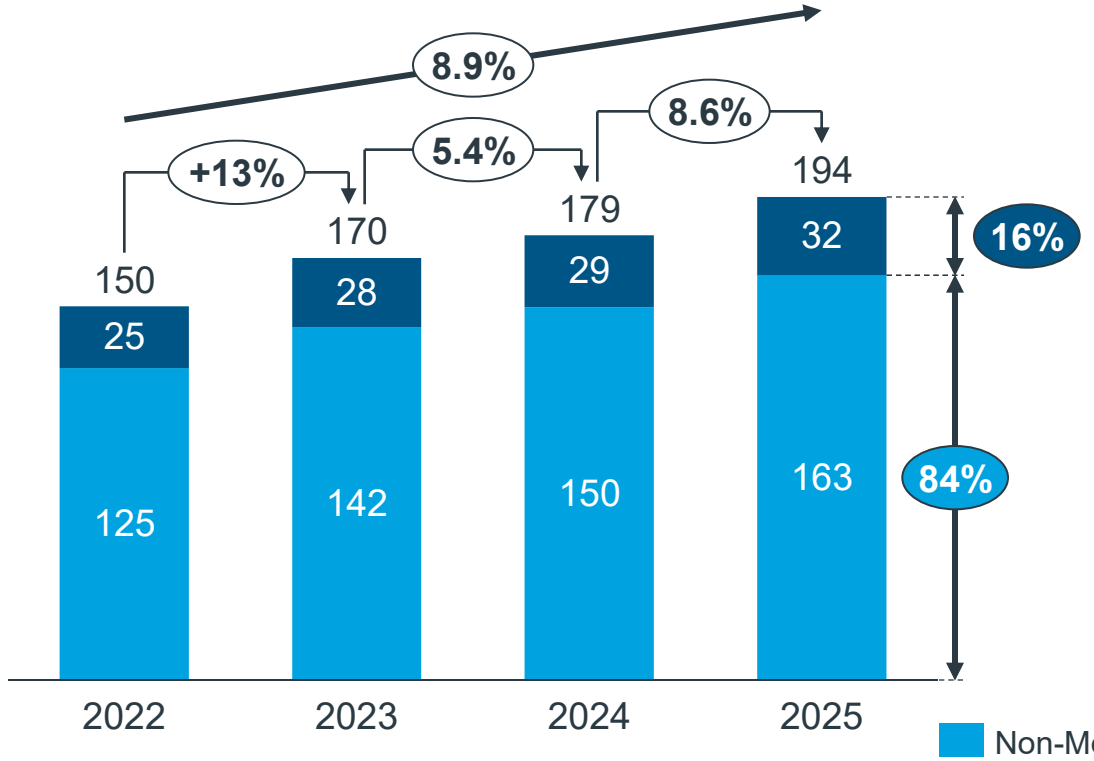
Medical Devices Innovation

Source: IQVIA Global CH Insights - MAT Q2 2025

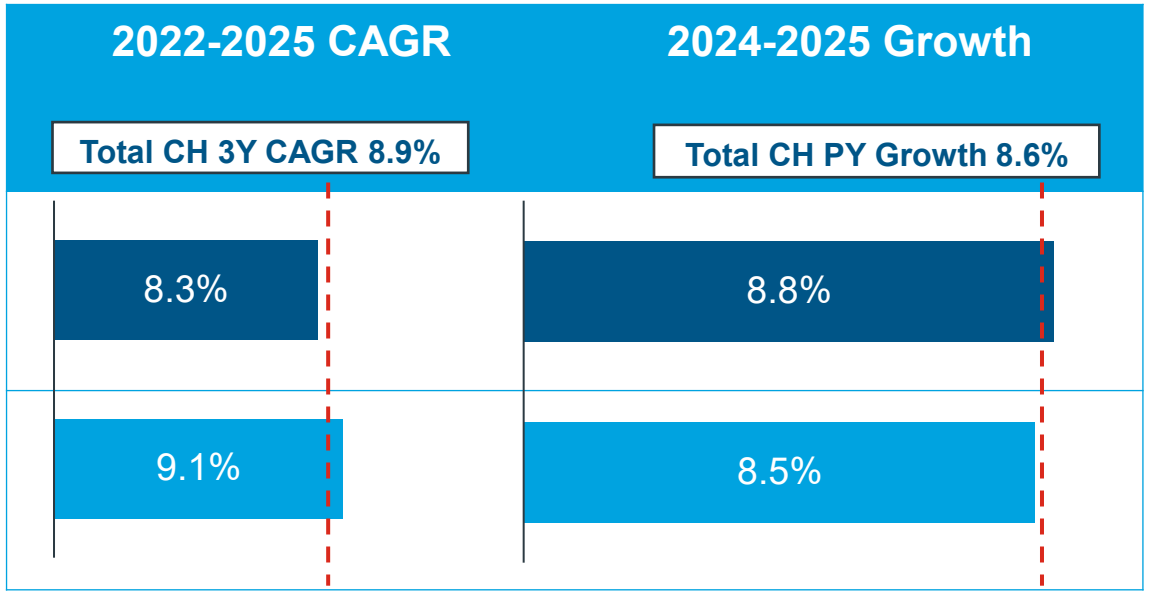
Latvia CH Market Size & Growth

Medical devices represent 16% of the overall CH value market and have experienced growth >8% in both the short and long term

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

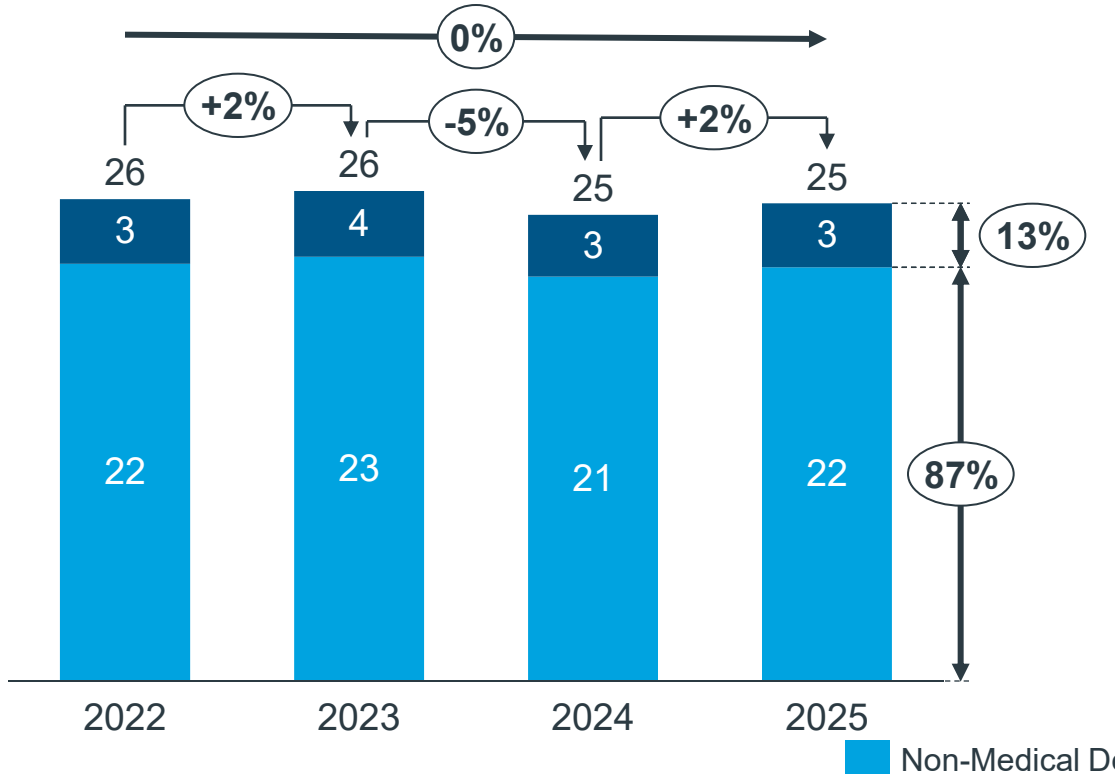


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

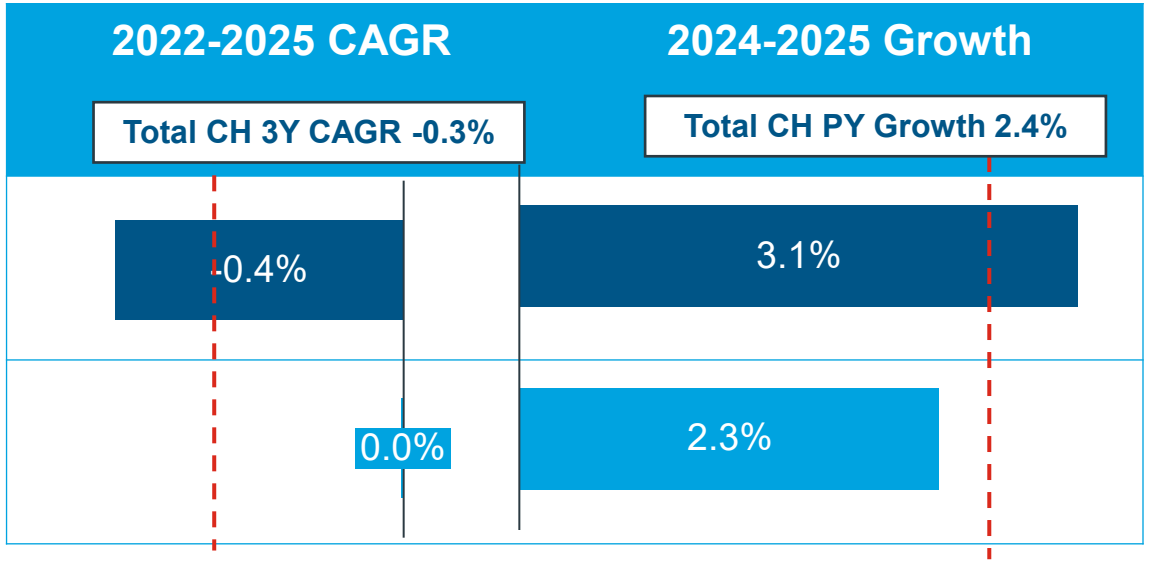
Latvia CH Market Volume & Growth

Market volume has stayed steady, showing positive growth over the past year

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Latvia CH Performance by Classes

The medical devices OTC market is expanding significantly, with growth of over 8% in S-T

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR Total CH 3Y CAGR 8.9%	2024-2025 Growth Total CH PY Growth 8.6%
OTC	100%	16% 32 / 163 / 194	8.3% / 9.1%	8.8% / 8.5%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter

Latvia CH Performance by Classes

Growth in medical device volumes remains mostly flat over both the short and long term

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
			Total CH 3Y CAGR -0.3%	Total CH PY Growth 2.4%
OTC	100%	3 / 22 / 25 (13%)	-0.4% / -0.3%	3.1% / 2.3%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter

Latvia Medical Devices Packs & New Launches

Over the past three years, more than 12% new packs launched were medical devices

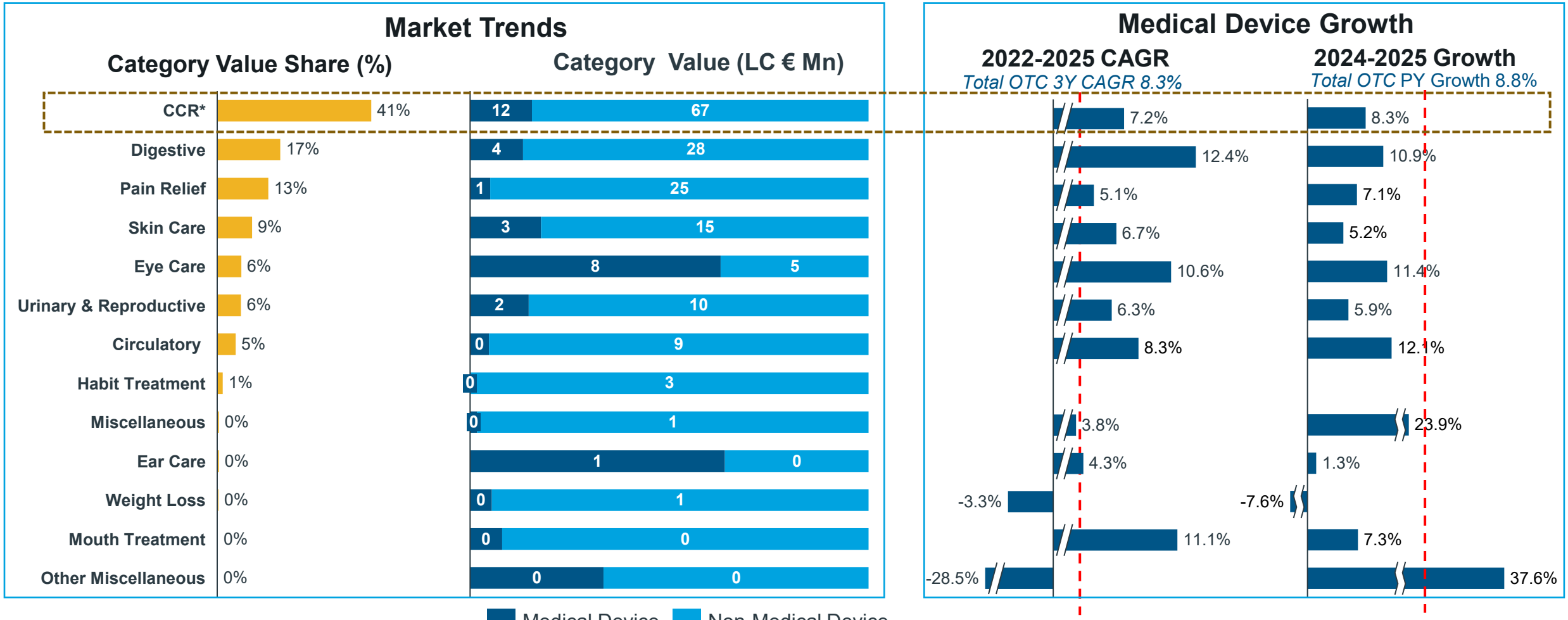
Category	Total Packs*			New Launches**		
CH Total	231	1,366	**1,597**	42	307	**349**
OTC	231	1,366	**1,597**	42	307	**349**

Medical Device Non Medical Device Medical Device Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Latvia OTC Performance by CHC 1 Category in 2025

CCR segment leads in medical device value sales

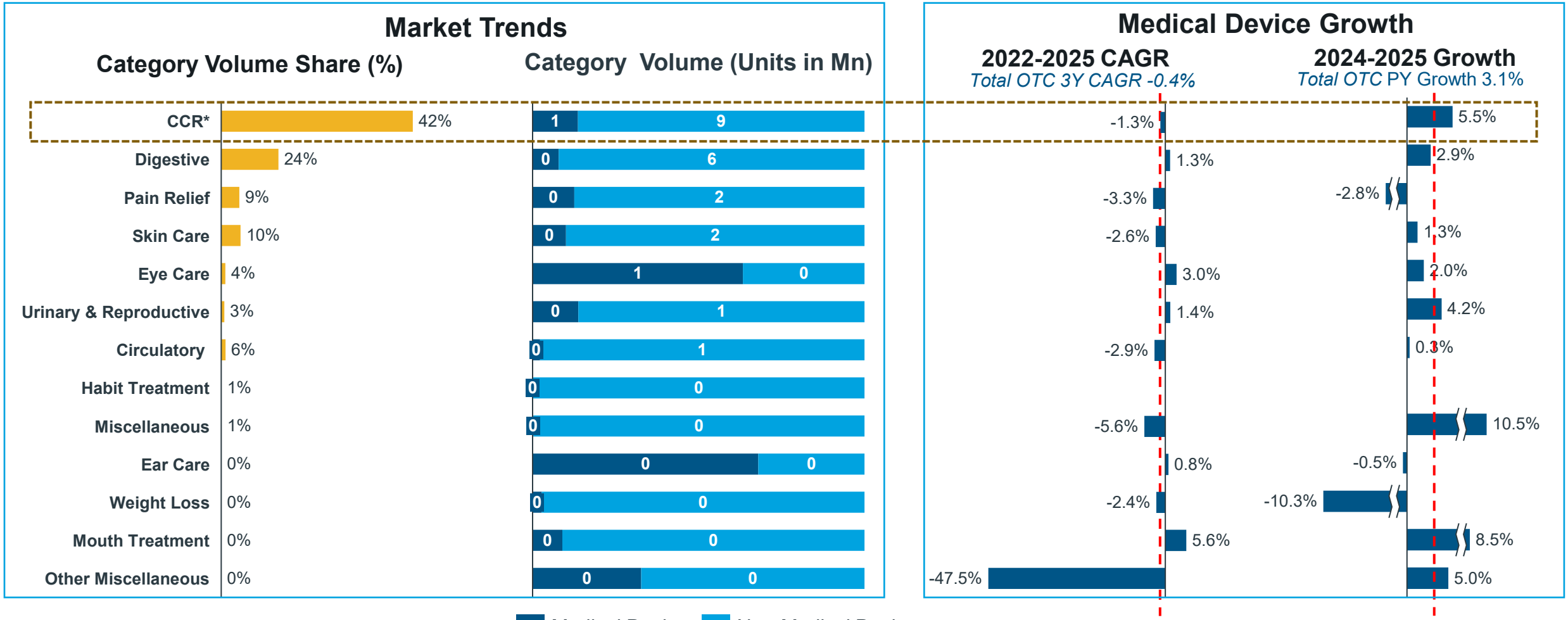


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Latvia OTC Performance by CHC 1 Category in 2025

CCR leads in medical device volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Latvia Medical Devices Performance by top CHC 2 Segments

Sore throat leads in values followed by nasal saline from the CCR category

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**31.6**	
CCR	39%	12.2	Sore Throat 4.4; Nasal Saline 3.2; Cough 1.8; Other Respiratory 1.7
Eye Care	24%	7.7	Not available
Digestive	14%	4.3	Acid & Heartburn 1.7; Laxatives 1.2; Digestive 1.1; Antidiarrhoeals 0.3
Skin Care	10%	3.2	Wound Healing 1.4; Skin Protector/Emollients 0.6; Antifungals 0.4; Wart/Corn Removal 0.3
Urinary & Reproductive	6%	1.8	Gynaecological 1.7; Urinary Condition 0.1; Urology 0.0; Male Condition 0.0
Pain Relief	4%	1.3	Muscular Pain 0.8; Mouth Pain 0.5; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Latvia Medical Devices Performance by top CHC 2 Segments

Antihemorrhoids in the circulatory category represent a value of €0.4 Mn

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	2%	0.5	Not available
Circulatory	1%	0.4	Antihemorrhoids 0.4; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	0%	0.1	Not available
Weight Loss	0%	0.0	Not available
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Latvia Medical Devices Performance by top CHC 2 Segments

Sore throat and nasal saline segments lead in volumes as well

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**3.4**	
CCR	43%	1.5	Sore Throat 0.6; Nasal Saline 0.3; Other Respiratory 0.2; Cough 0.2
Eye Care	20%	0.7	Not available
Digestive	14%	0.5	Acid & Heartburn 0.2; Digestive 0.2; Laxatives 0.1; Antidiarrhoeals 0.1
Skin Care	8%	0.3	Wound Healing 0.1; Skin Protector/Emollients 0.1; Hand Skin Wound Disinfect 0.0; Skin Irritation 0.0
Urinary & Reproductive	3%	0.1	Gynaecological 0.1; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	9%	0.3	Muscular Pain 0.2; Mouth Pain 0.1; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Latvia Medical Devices Performance by top CHC 2 Segments

Ear care and circulatory segment contributes to <5% of the volume share

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	2%	0.1	Not available
Circulatory	1%	0.0	Antihemorrhoids 0.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Other Miscellaneous	0%	0.0	Not available
Weight Loss	0%	0.0	Not available
Mouth Treatment	0%	0.0	Other Mouth Treatment 0.0; Mouth Infection 0.0; Fluoride Products 0.0
Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Estonia Medical Devices – Market Dynamics

Estonia Medical Devices Performance Overview

The medical device sector has experienced growth of 0.8% in value, contributing to an overall positive market trend

17%

Medical device share of total CH value in 2025

Long –term Growth

0.8% by value

-1.9% by volume

Short –term Growth

4.0% by value

-2.0% by volume

Medical Devices – €19 Mn (2025)

100% OTC value share

Long-term Growth (Value)

0.8%
OTC

Medical Devices Categories

CCR

35% *Share for total OTC value in 2025*

Long-term Growth

-9.0% by value

OTC (Over-the-Counter)

14%

Contribution to total new pack launches in last 3 years;

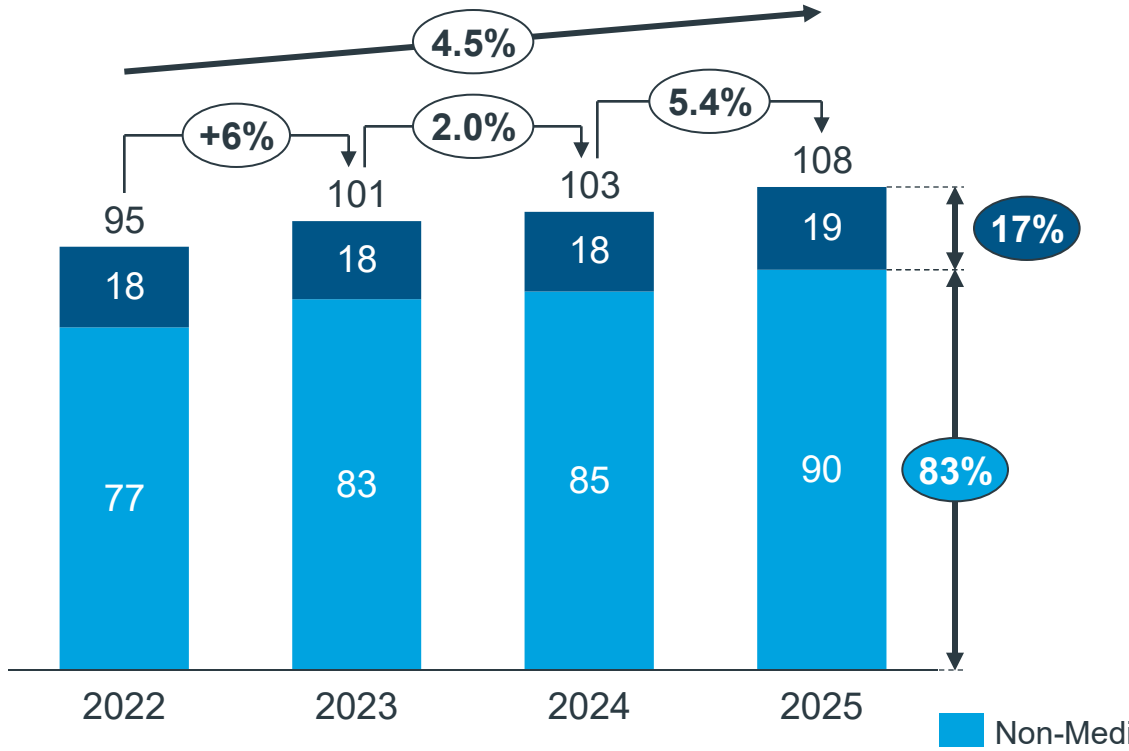
Medical Devices Innovation

Source: IQVIA Global CH Insights - MAT Q2 2025

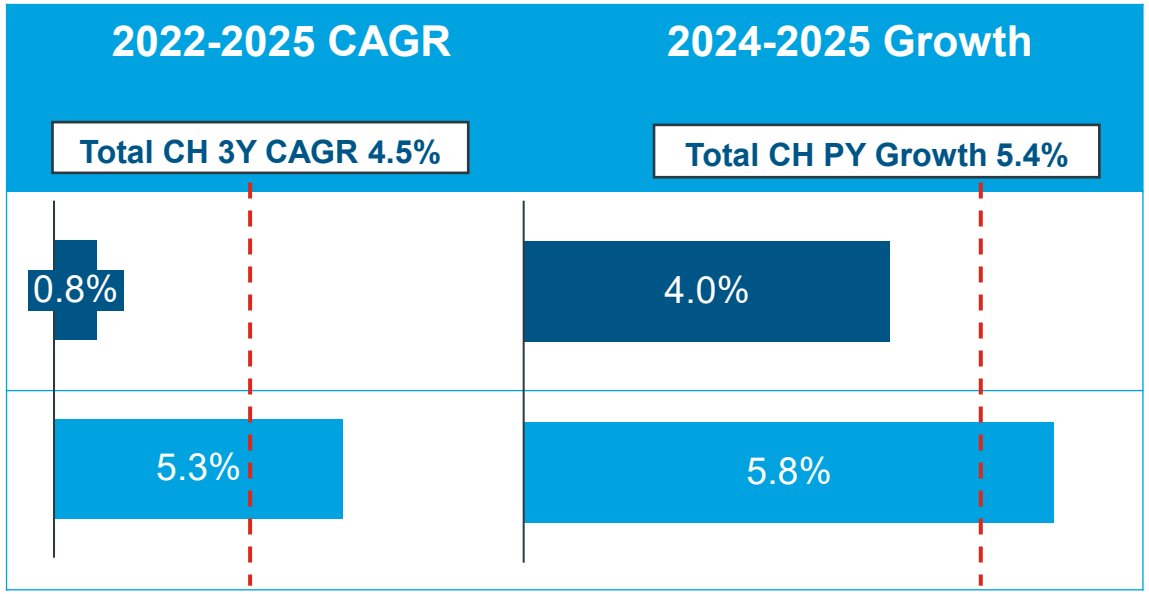
Estonia CH Market Size & Growth

CH value market is expanding consistently, with a growth rate of 5.4% in the short term and 4.5% over the long term

CH Market Value (LC€ Mn), and Latest Value Share (%)



Value Growth

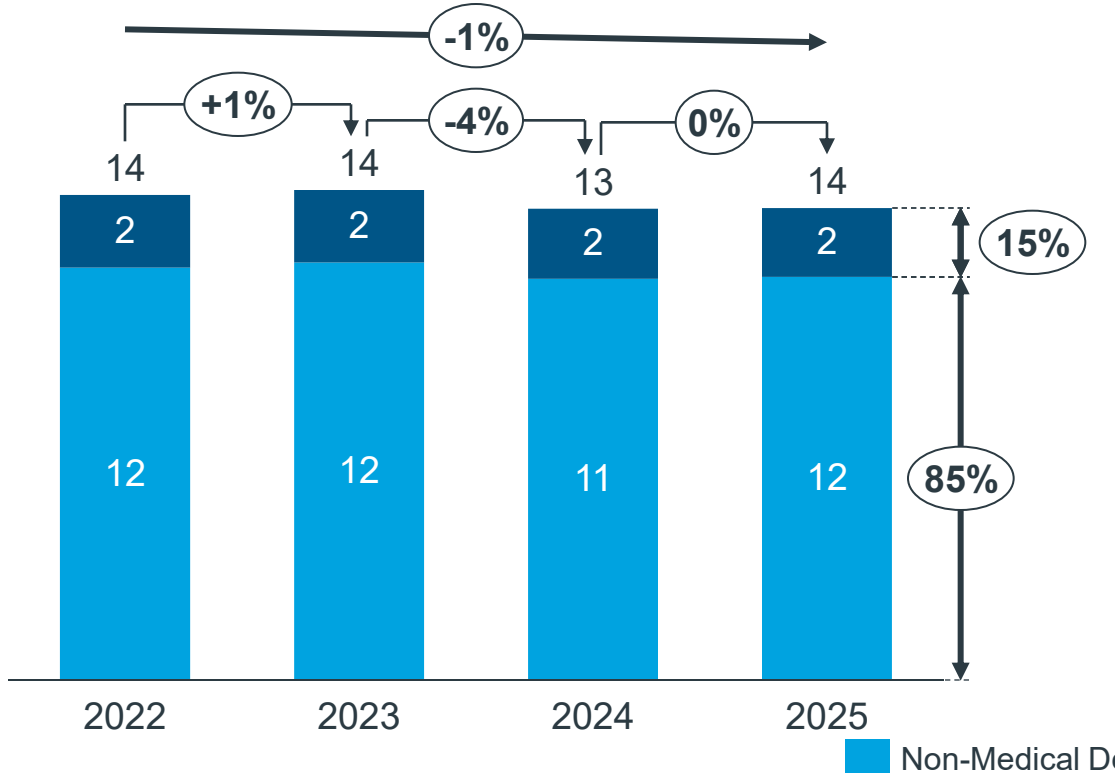


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

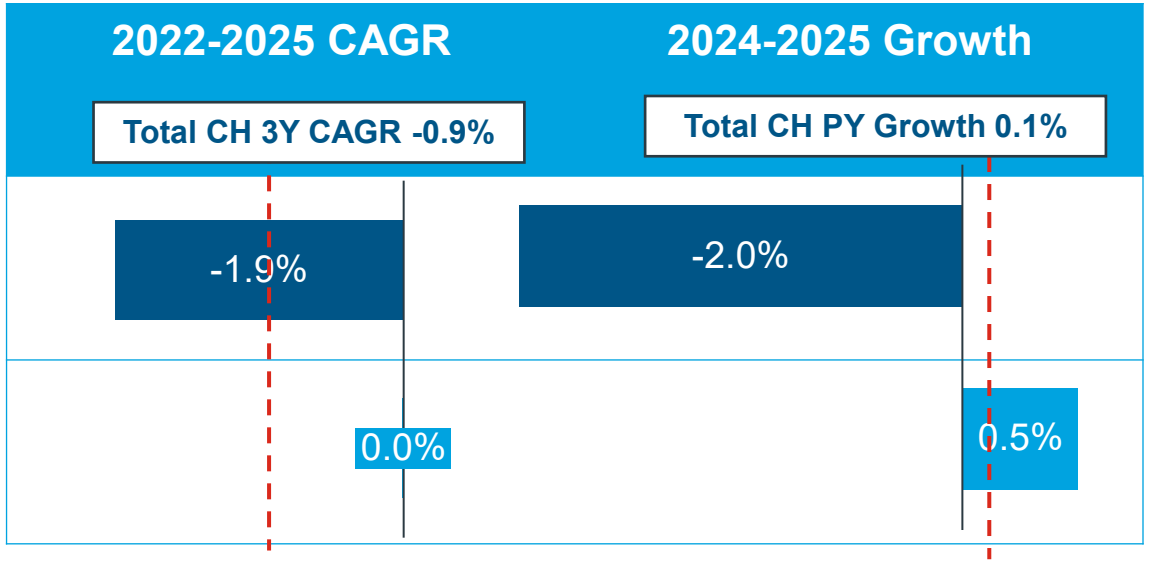
Estonia CH Market Volume & Growth

CH market volume has remained largely flat, with minimal growth; medical devices record decline in L-T and S-T

Market Volume (Mn Units), and Latest Volume Share (%)



Volume Growth



Source: IQVIA Global CH Insights– Sales in Unit based on MAT Q2 2025
* Non- medical device products include registered OTC medicines, food supplements and other nonregistered products except medical devices

Estonia CH Performance by Classes

Medical device segment growth lower than non-medical device segment in both the periods

CH Classes	Value Share (%)	Value Sales (LC € bn) Medical devices Value Share (%)	2022-2025 CAGR Total CH 3Y CAGR 4.5%	2024-2025 Growth Total CH PY Growth 5.4%
OTC	100%	17% 19 / 90 / 108	0.8% 5.3%	4.0% 5.8%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025
OTC: Over the counter

Estonia CH Performance by Classes

Medical device segment volume growth lower than non-medical device segment in both the periods

CH Classes	Volume Share (%)	Volume Sales (Mn Units) Medical devices Volume Share (%)	2022-2025 CAGR	2024-2025 Growth
			Total CH 3Y CAGR -0.9%	Total CH PY Growth 0.1%
OTC	100%	2 / 12 / 14 (15%)	-1.9% / -0.7%	-2.0% / 0.5%

Medical Device Non- Medical Device

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
OTC: Over the counter

Estonia Medical Devices Packs & New Launches

In the last three years, there have been 35 new medical device pack launches

Category	Total Packs*			New Launches**		
CH Total	161	929	**1,090**	35	219	**254**
OTC	161	929	**1,090**	35	219	**254**

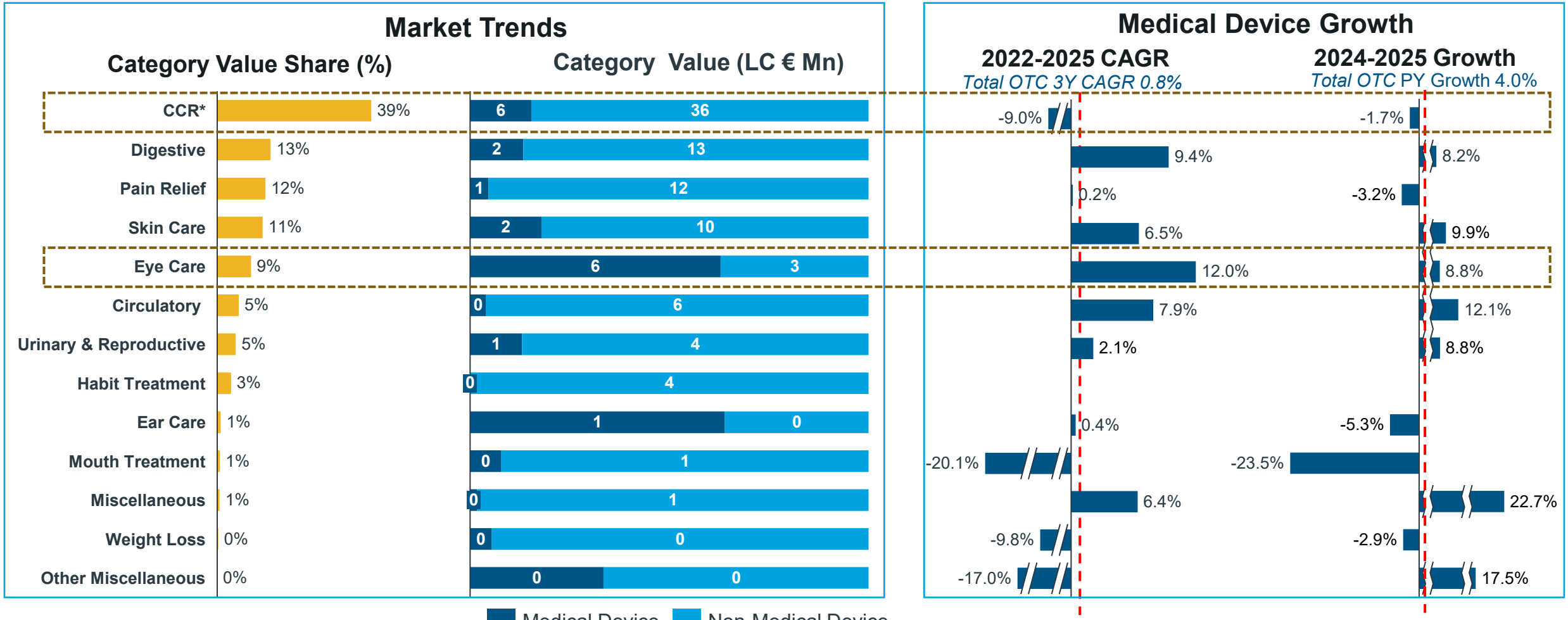
Medical Device | Non Medical Device

Medical Device | Non Medical Device

Source: IQVIA Global CH Insights – Units based on MAT Q2 2025
*Total Packs represent the unique number of pack available in the market
*New Launch products represent the unique packs had been launched in last 3 year

Estonia OTC Performance by CHC 1 Category in 2025

CCR and eye care segments lead in medical device value sales

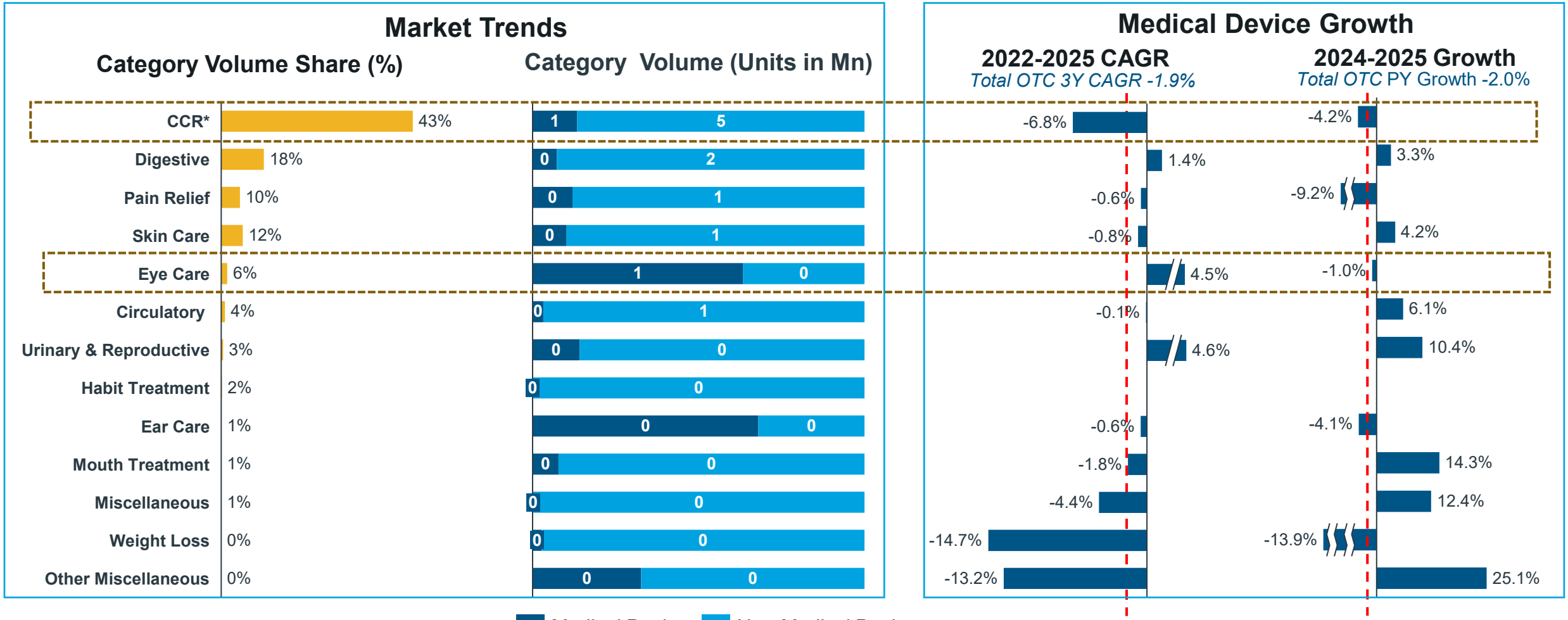


Source: IQVIA Global CH Insights– Sales in Local Currency €uros (Public Prices) based on MAT Q2 2025; Categories with <1% share such as Habit treatment and Ear care are excluded

L-T – Long term, CCR – Cough Cold & Other Respiratory Products; Miscellaneous include homeopathy & herbal products, salt substitutes, Thyroid therapies, Adjuvant products for diabetes

Estonia OTC Performance by CHC 1 Category in 2025

Like values, eye care and CCR leads in medical device volumes as well



Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025
*CCR – Cough Cold & Other Respiratory Products, S-T- Short term, L-T- long term
Categories with <1% share such as Ear care and Habit treatment are excluded

Estonia Medical Devices Performance by top CHC 2 Segments

*Nasal saline from the CCR is the leading category in CHC 2 segments with **€ 2.3Mn** in values*

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
OTC- Medical Device		**18.6**	
CCR	35%	6.5	Nasal Saline 2.3; Sore Throat 1.7; Cough 1.3; Other Respiratory 0.7
Eye Care	31%	5.8	Not available
Skin Care	12%	2.2	Wound Healing 0.9; Skin Protector/Emollients 0.4; Hand Skin Wound Disinfect 0.3; Wart/Corn Removal 0.3
Digestive	10%	1.9	Laxatives 0.9; Acid & Heartburn 0.5; Digestive 0.4; Antidiarrhoeals 0.2
Urinary & Reproductive	4%	0.7	Gynaecological 0.6; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	3%	0.6	Muscular Pain 0.4; Mouth Pain 0.2; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Estonia Medical Devices Performance by top CHC 2 Segments

Ear care and circulatory segments constitute only a minor fraction of the total value share

CHC 1 Category*	CHC 1 Value share (%) of total Medical Devices sales	Medical Device Value (LC€ Mn)	Top 4 CHC 2 Segments^ – Medical Device Value (LC € Mn) in 2025
Ear Care	3%	0.6	Not available
Circulatory	1%	0.2	Antihemorrhoids 0.2; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.1	Mouth Infection 0.0; Other Mouth Treatment 0.0
Weight Loss	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Local Currency €uros based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category value

Estonia Medical Devices Performance by top CHC 2 Segments

Nasal saline leads in volumes as well; CCR accounts for 40% of the total medical device volumes

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
OTC- Medical devices		**2.0**	
CCR	40%	0.8	Nasal Saline 0.3; Sore Throat 0.2; Cough 0.1; Other Respiratory 0.1
Eye Care	28%	0.5	Not available
Skin Care	8%	0.2	Wound Healing 0.1; Skin Protector/Emollients 0.0; Hand Skin Wound Disinfect 0.0; Wart/Corn Removal 0.0
Digestive	9%	0.2	Laxatives 0.1; Digestive 0.1; Acid & Heartburn 0.0; Antidiarrhoeals 0.0
Urinary & Reproductive	3%	0.1	Gynaecological 0.1; Urinary Condition 0.0; Urology 0.0; Male Condition 0.0
Pain Relief	8%	0.2	Muscular Pain 0.1; Mouth Pain 0.0; Joint Care 0.0; Other Pain Relief 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

Estonia Medical Devices Performance by top CHC 2 Segments

Ear care segment contributes to 3% of the volume share

CHC 1 Category*	CHC 1 Volume share(%) of total Medical Devices sales	Medical Device Volume (Units in Mn)	Top 4 CHC 2 Segments^ – Medical Device Volume (Units in Mn) in 2025
Ear Care	3%	0.1	Not available
Circulatory	1%	0.0	Antihemorrhoids 0.0; Chloesterol Regulating 0.0; Other Circulatory 0.0
Mouth Treatment	0%	0.0	Mouth Infection 0.0; Other Mouth Treatment 0.0
Weight Loss	0%	0.0	Not available
Miscellaneous	0%	0.0	Not available
Other Miscellaneous	0%	0.0	Not available
Habit Treatment	0%	0.0	Anti Alcohol 0.0; Smoking control 0.0; Nail Biting 0.0

Source: IQVIA Global CH Insights– Sales in Units based on MAT Q2 2025

** Top 6 categories based on their Medical devices value sales (in descending order)*

^ Leading subsegments that account for >80% medical device share of respective CHC 1 category volume

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Thank you

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