

Pharmacy Market Watch

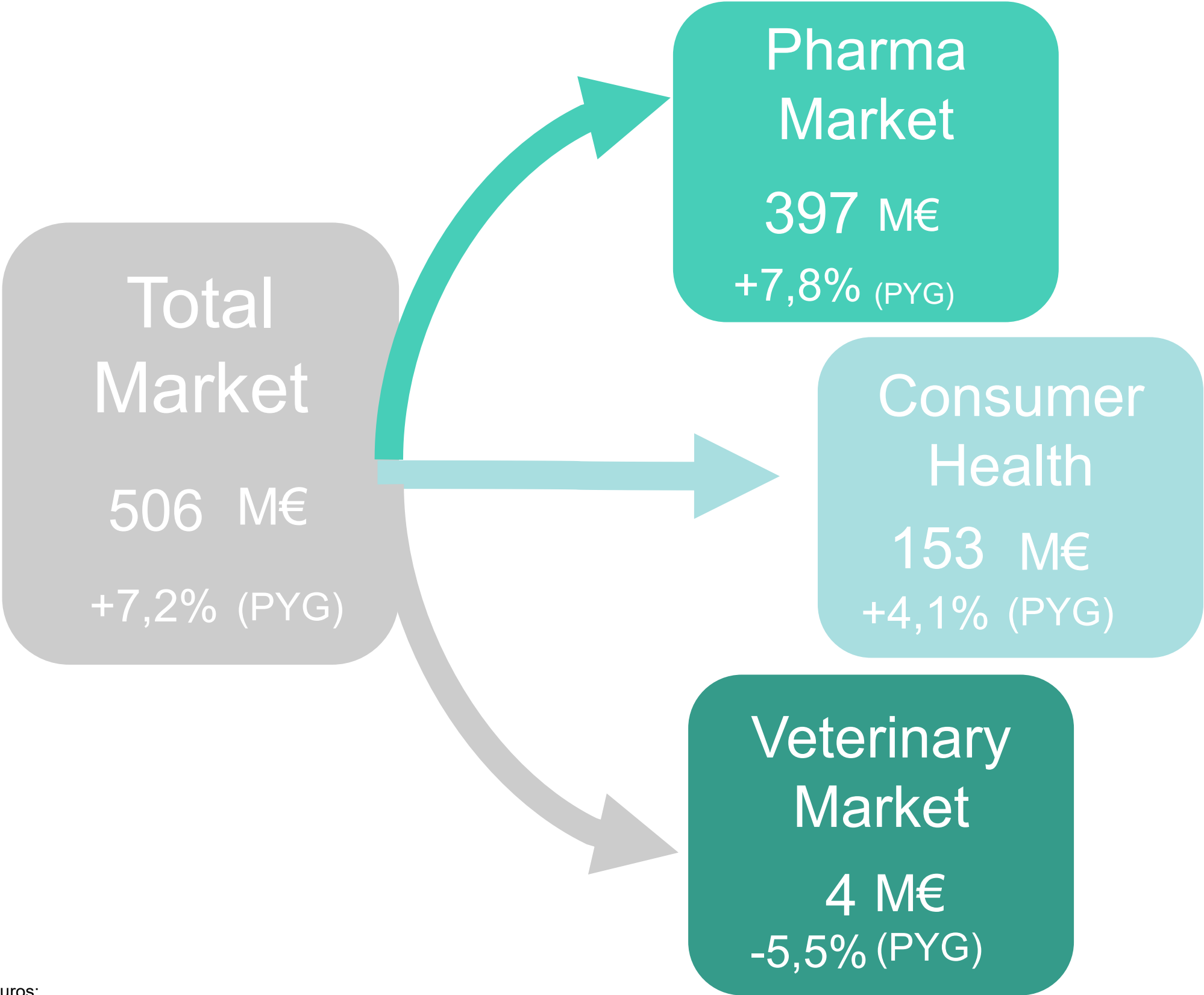
July 2026

Marketing Team

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Pharmacy Total Market – Sell Out Value and Units

July 2026

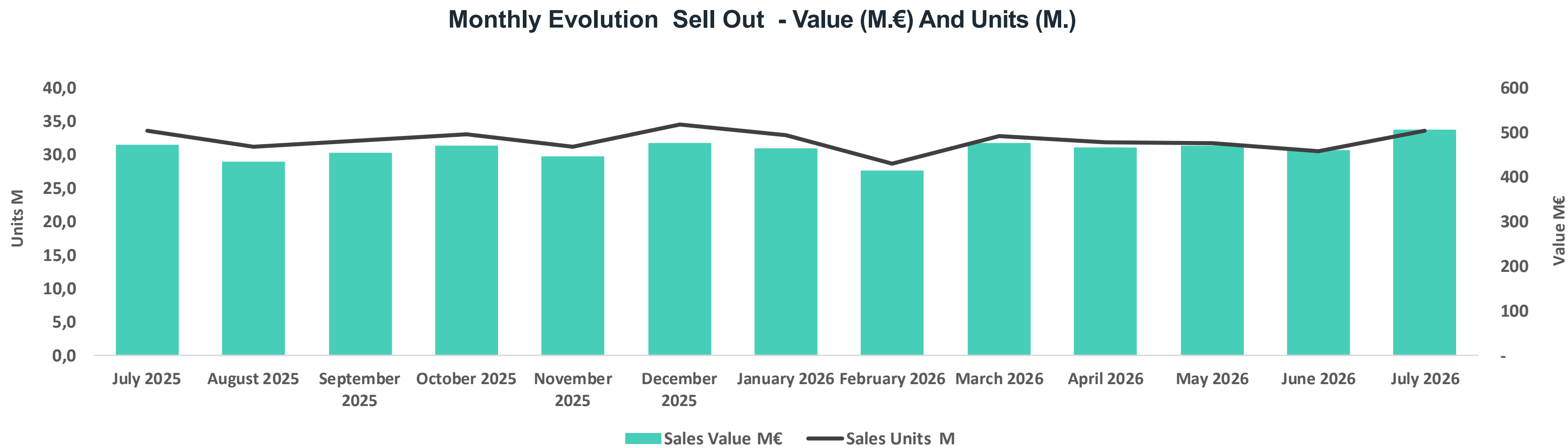


Relative Segment Contribution (Value)

RX Market	69%
Consumer Health	30%

Pharmacy Total Market – Sell Out Value and Units

July 2026



There is a variation in sales in the last month, compared to the same month of the previous year of **7,2%** and **0,0%** in value and units, respectively.

Pharma Market – Sell Out Value and Units

July 2026

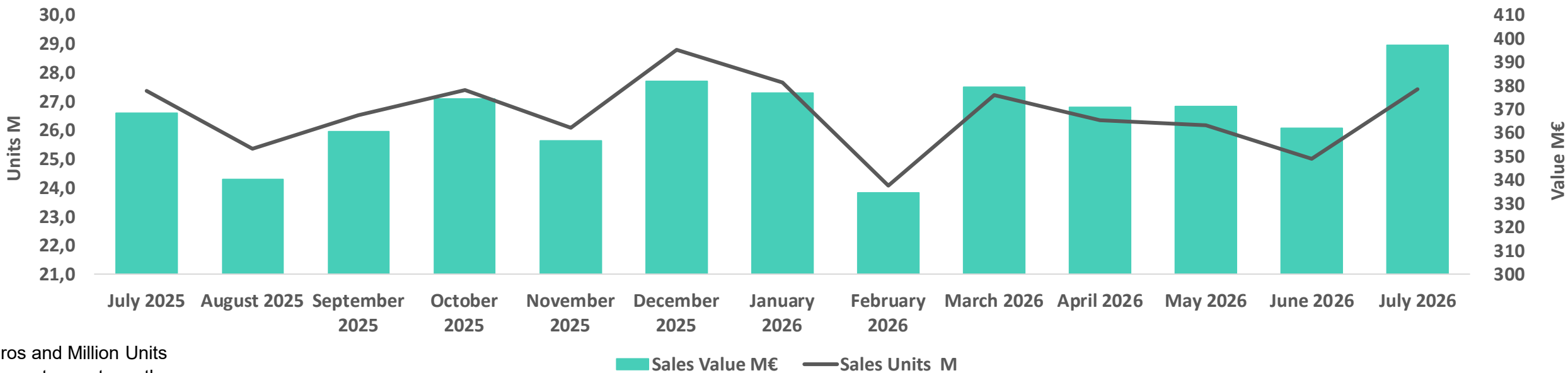
Top 5 ATC3 With The Most Competitive Dynamics

Rank Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1	A10S - Agonista do GLP-1	14,37 M€	64,3%
2	A10P - Antidiabéticos inibidores do co-transportador de sódio e glucose 2 (SGLT2)	3,08 M€	9,9%
3	A08A - Preparações anti-obesidade excluindo produtos dietéticos	2,45 M€	120,4%
4	C10C - Associações entre reguladores de lípidos	1,74 M€	17,9%
5	N06A - Antidepressivos e estabilizadores do humor	1,24 M€	7,8%

Top 5 Products With Higher Performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Mounjaro	12,16 M€	102,7%
2	Ozempic	3,04 M€	70,6%
3	Wegovy FlexTouch	2,78 M€	207,8%
4	Eliquis	0,97 M€	10,7%
5	Forxiga	0,84 M€	10,6%

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



July 2026

Sales Units PYG% 0,2%

Sales Value PYG% 7,8%

Branded Pharma Market – Sell Out Value and Units

July 2026

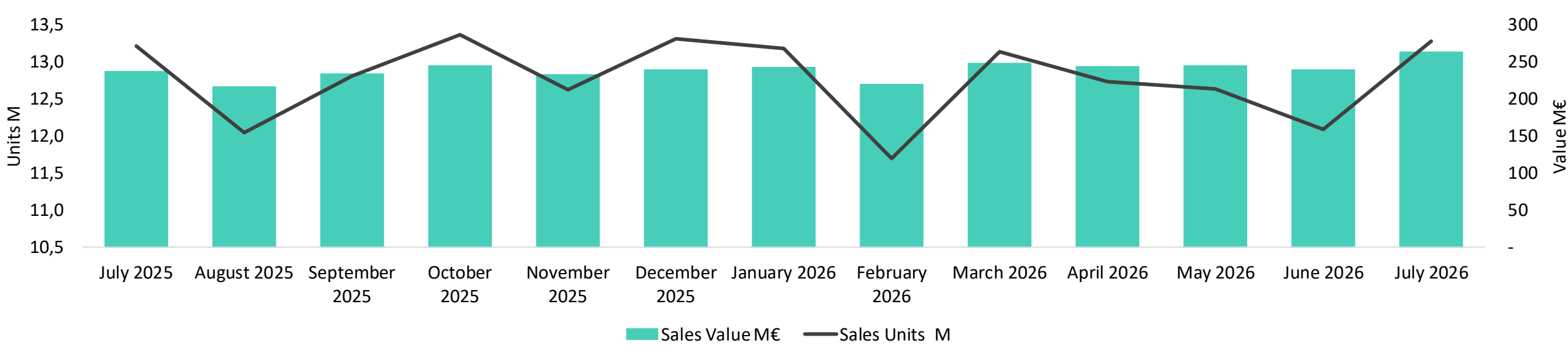
Top 5 ATC3 With The Most Competitive Dynamics

Rank Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1	A10S - Agonista do GLP-1	14,37 M€	64,3%
2	A10P - Antidiabéticos inibidores do co-transportador de sódio e glucose 2 (SGLT2)	2,90 M€	9,3%
3	A08A - Preparações anti-obesidade excluindo produtos dietéticos	2,45 M€	122,0%
4	B01F - Inibidores directos do Factor Xa	1,21 M€	7,9%
5	C10C - Associações entre reguladores de lípidos	1,18 M€	13,1%

Top 5 Products With Higher Performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Mounjaro	12,16 M€	102,7%
2	Ozempic	3,04 M€	70,6%
3	Wegovy FlexTouch	2,78 M€	207,8%
4	Eliquis	0,97 M€	10,7%
5	Forxiga	0,84 M€	10,6%

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



July 2026

Sales Units PYG% 0,5%

Sales Value PYG% 10,9%

Generic Market – Sell Out Units

July 2026

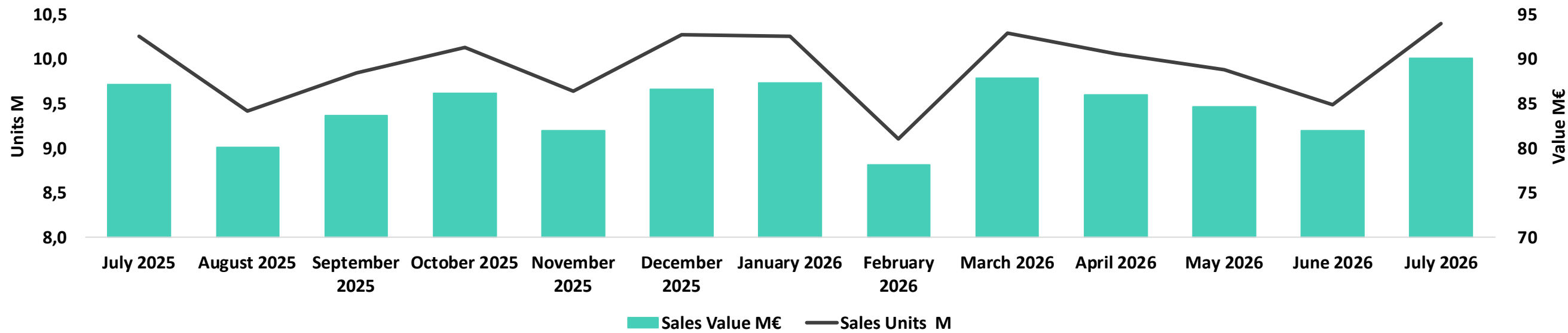
Top 5 DCI With The Most Competitive Dynamics

Rank	Var. Abs.	DCI	Var. Abs. Unid (K)	Var. PYG%
1		Atorvastatina + Ezetimiba	30,88 K	143,4%
2		Rosuvastatina	23,79 K	8,1%
3		Furosemida	20,94 K	31,0%
4		Prednisolona	20,50 K	-
5		Duloxetina	16,71 K	22,1%

Top 5 Products With Higher Perfomance

Rank	Var. Abs.	Product	Var. Abs. Unid (K)	Var. PYG%
1		Sertralina Generis (MG)	50,43 K	-
2		Ramipril Romace (MG)	29,87 K	-
3		Prednisolona Generis (MG)	20,50 K	-
4		Atorvastatina Aurobindo (MG)	19,64 K	32,1%
5		Tramadol/Paracetamol Mylan (MG)	18,70 K	182,3%

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



July 2026

Sales Units PYG% 1,4%

Sales Value PYG% 3,4%

Consumer Healthcare Market – Sell Out Value and Units

July 2026

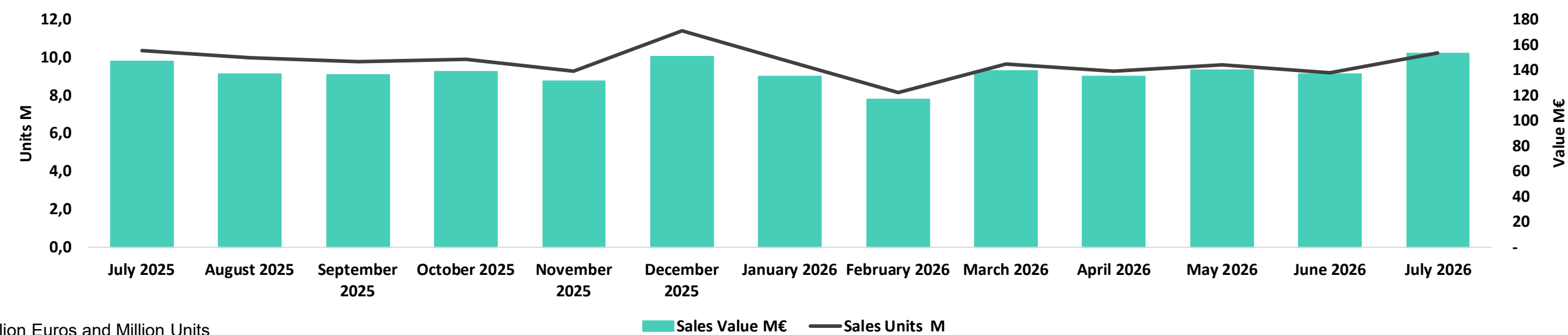
Top 5 HMR 3 With The Most Competitive Dynamics

Rank Var. Abs.	HMR3	Var. Abs. M€ PYG	Var. PYG%
1	H26.4.12. - Medição de glicose contínua	2,43 M€	41,1%
2	H16.4.1. - Anti envelhecimento e anti rugas mulher	0,53 M€	15,9%
3	H04.2.5. - Antidiarreicos	0,51 M€	22,8%
4	H05.4.1. - Suplementos Magnésio	0,41 M€	15,0%
5	H17.15.6. - Antiqueda de cabelo	0,26 M€	16,0%

Top 5 Products With Higher Performace

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Freestyle Libre 2 Plus	1,02 M€	20,8%
2	Dexcom G7	0,73 M€	227,4%
3	Medtronic Guardian 4	0,44 M€	64,6%
4	Theahyabak	0,34 M€	-
5	Uriage Xemose C8+	0,31 M€	-

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



July 2026

Sales Units PYG% -1,5%

Sales Value PYG% 4,1%

Consumer Health Segments Performance - Top 5 Products With Higher Performane

July 2026

OTC

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	518.775 €	1,1%	3,9%
1	Bioflavonóides Vasoflon	274.556 €	-	
2	Pankreoflat	174.919 €	904,5%	6,1%
3	Sildenafil Desay (MG)	120.652 €	962,8%	11,2%
4	Bilastina Allergin (MG)	113.378 €	-	
5	Ben-u-gripe	94.264 €	-	

Supplements

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	961.030 €	3,7%	4,0%
1	Magnesium-OK Mulher 50+	168.387 €	182,6%	38,0%
2	ZzzQuil Sono	123.913 €	747,7%	4,5%
3	Fisiogen Ferro Forte	109.021 €	27,1%	1,5%
4	Pure Encapsulations Magnésio	104.441 €	197,4%	5,6%
5	ZzzQuil Sono Forte	77.031 €	141,2%	-6,4%

Personal Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	1.239.106 €	3,8%	3,7%
1	Uriage Xemose C8+	308.569 €	-	
2	Elugel	109.402 €	60,1%	11,0%
3	Filorga NCEF-Revitalize	99.617 €	162,3%	14,5%
4	Anthelios	91.122 €	15,4%	2,7%
5	Cicalfate+	89.533 €	20,1%	7,4%

Consumer Health Segments Performance - Top 5 Products With Higher Perfomance

July 2026

Patient Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	2.533.962 €	6,9%	9,6%
1	Freestyle Libre 2 Plus	1.015.343 €	20,8%	0,0%
2	Dexcom G7	725.753 €	227,4%	0,0%
3	Medtronic Guardian 4	436.880 €	64,6%	0,0%
4	Theahyabak	337.197 €	-	
5	Accu-Chek SmartGuide	228.468 €	28474,8%	-27,4%

Nutrition

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	754.428 €	15,6%	2,4%
1	Meritene Clinical Diabet	73.549 €	-	
2	Meritene Clinical Extra Protein	66.157 €	59,1%	3,2%
3	Meritene Clinical Protein 1.25	60.247 €	-	
4	Glytactin Build 20	56.531 €	1161,3%	17,3%
5	Fresubin Protein Energy Drink	48.287 €	70,0%	0,3%

Veterinary Market – Sell Out Value and Units

July 2026

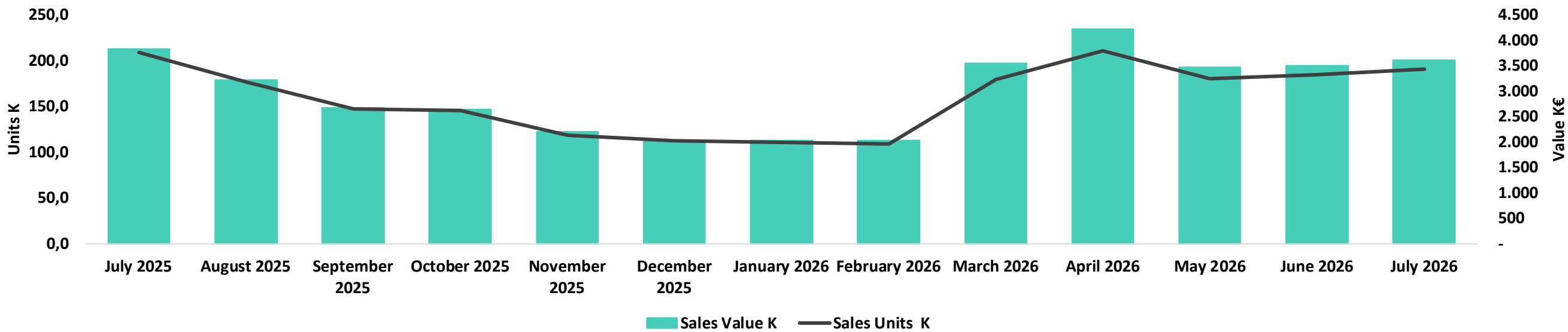
Top 5 HMR 3 With The Most Competitive Dynamics

Rank Var. Abs.	HMR3	Var. Abs. Value	Var. PYG%
1	H21.2.3. - Antiparasitários internos e externos	14.919 €	4,1%
2	H21.13.1. - Antineoplásicos	11.709 €	135,3%
3	H21.4.2. - Vacinas	10.158 €	36,6%
4	H21.6.9. - Fármacos usados na diabetes	6.357 €	28,5%
5	H21.10.2. - Terapêutica tiroideia	6.226 €	27,4%

Top 5 Products With Higher Performace

Rank Var. Abs.	PRODUCT	Var. Abs. Value	Var. PYG%
1	AdTab	25.543 €	11,3%
2	Drontal Puppy	12.153 €	460,8%
3	Palladia	11.535 €	141,8%
4	Zenrelia	10.808 €	-
5	Nexgard Spectra	7.330 €	5,4%

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



July 2026

Sales Units PYG% -8,8%

Sales Value PYG% -5,5%

Data Specification



HMR Pharmacy Universe

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

HMR Pharmacy Panel

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

Scope

Monthly evolution of the Pharmacy Market in Portugal.

Periodicity

Monthly

Periods of time in the report

Monthly data with 25 months historical data.

Measures included in the report:

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

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

Segments

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

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

*AIM - Autorização de Introdução no Mercado

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