

Pharmacy Market Watch

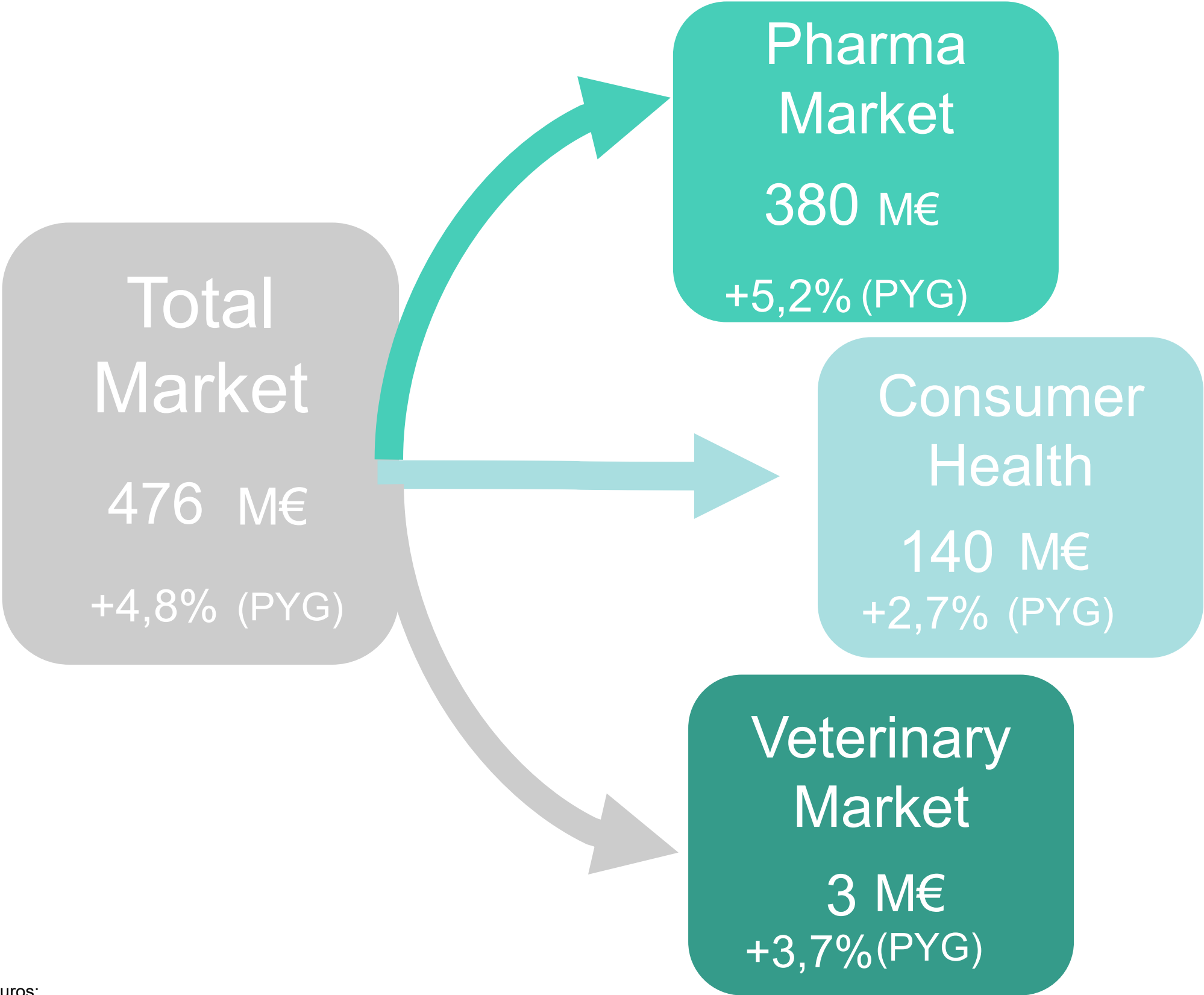
September 2026

Marketing Team

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Pharmacy Total Market – Sell Out Value and Units

September 2026

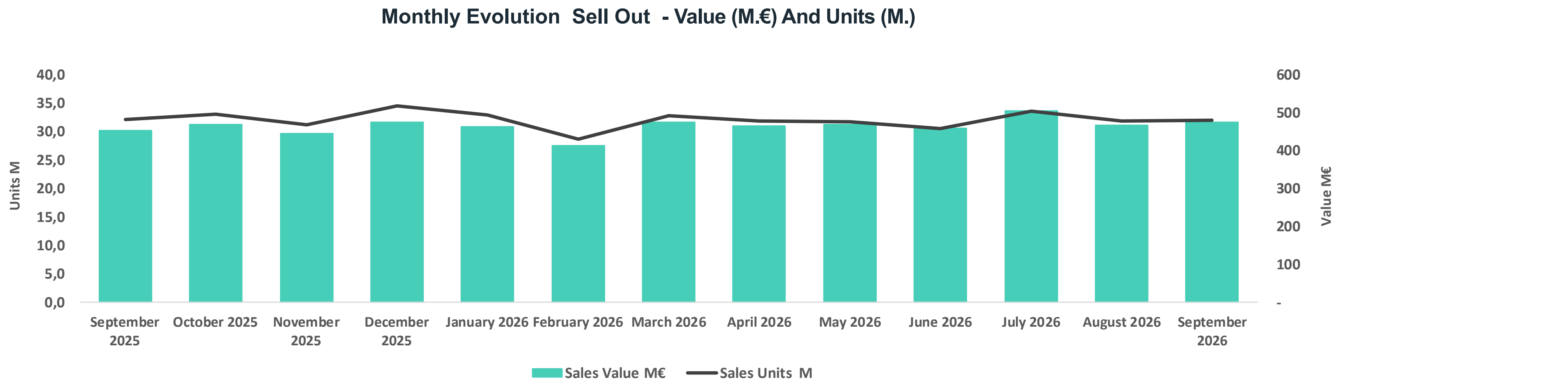


Relative Segment Contribution (Value)

RX Market	70%
Consumer Health	29%
Veterinary	0,6%

Pharmacy Total Market – Sell Out Value and Units

September 2026



There is a variation in sales in the last month, compared to the same month of the previous year of **4,8%** and **-0,5%**in value and units, respectively.

Pharma Market – Sell Out Value and Units

September 2026

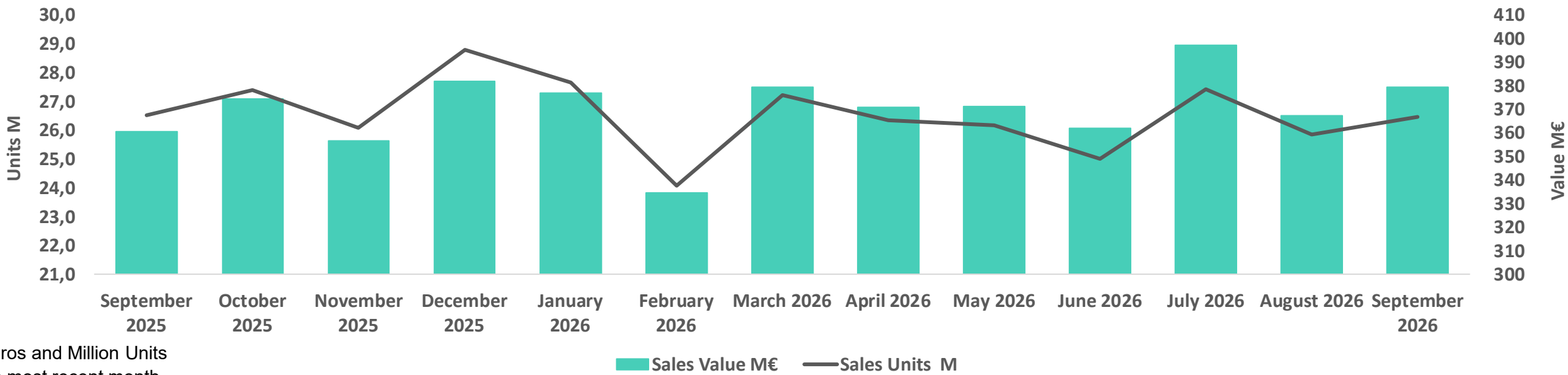
Top 5 ATC3 With The Most Competitive Dynamics

Rank	Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1		A10S - Agonista do GLP-1	12,68 M€	55,2%
2		A08A - Preparações anti-obesidade excluindo produtos dietéticos	2,58 M€	126,0%
3		C10C - Associações entre reguladores de lípidos	1,59 M€	16,7%
4		N06A - Antidepressivos e estabilizadores do humor	1,08 M€	7,1%
5		N06B - Psicoestimulantes	0,86 M€	31,4%

Top 5 Products With Higher Performance

Rank	Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1		Mounjaro	10,45 M€	82,6%
2		Dalzior (MG)	3,53 M€	-
3		Wegovy FlexTouch	2,80 M€	183,5%
4		Ozempic	2,73 M€	59,4%
5		Eliquis	0,70 M€	7,7%

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



September 2026

Sales Units PYG% -0,2%

Sales Value PYG% 5,2%

Branded Pharma Market – Sell Out Value and Units

September 2026

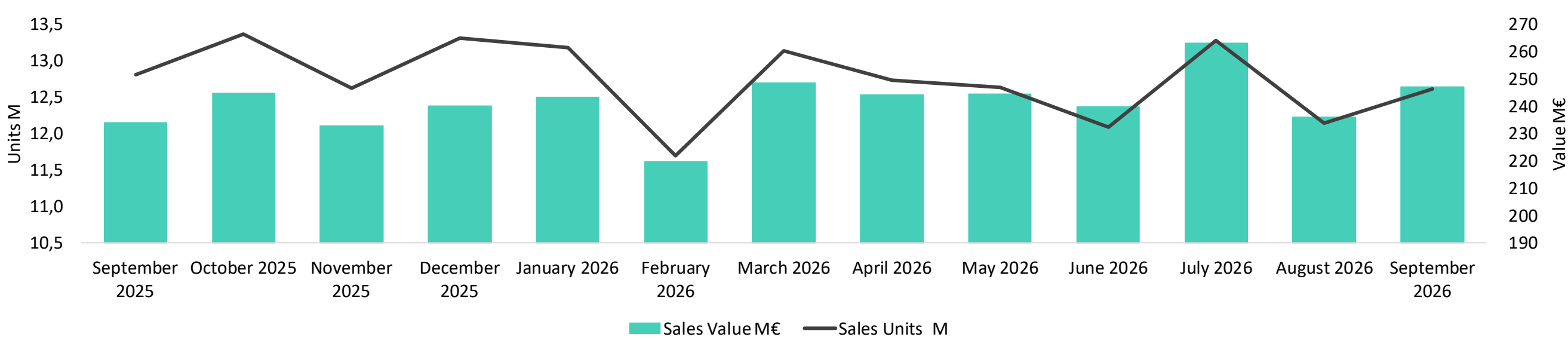
Top 5 ATC3 With The Most Competitive Dynamics

Rank Var. Abs.	ATC3	Var. Abs. M€ PYG	Var. PYG%
1	A10S - Agonista do GLP-1	12,68 M€	55,2%
2	A08A - Preparações anti-obesidade excluindo produtos dietéticos	2,59 M€	127,6%
3	B01F - Inibidores directos do Factor Xa	0,86 M€	5,7%
4	C10C - Associações entre reguladores de lípidos	0,83 M€	9,2%
5	N06B - Psicoestimulantes	0,82 M€	34,6%

Top 5 Products With Higher Performance

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Mounjaro	10,45 M€	82,6%
2	Wegovy FlexTouch	2,80 M€	183,5%
3	Ozempic	2,73 M€	59,4%
4	Eliquis	0,70 M€	7,7%
5	Jardiance	0,68 M€	12,2%

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



September 2026

Sales Units PYG% -1,5%

Sales Value PYG% 5,7%

Generic Market – Sell Out Units

September 2026

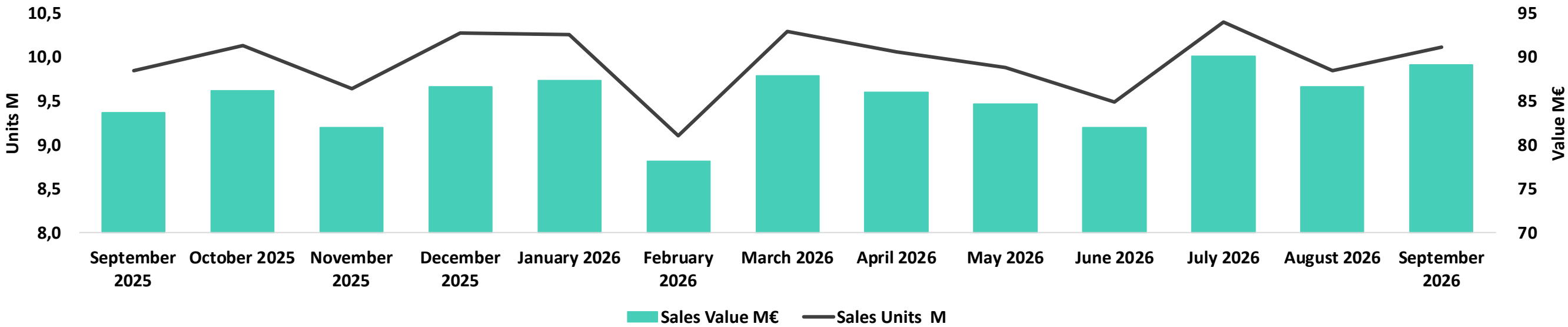
Top 5 DCI With The Most Competitive Dynamics

Rank Var. Abs.	DCI	Var. Abs. Unid (K)	Var. PYG%
1	Dapagliflozina	192,86 K	#####
2	Atorvastatina + Ezetimiba	40,96 K	275,9%
3	Bilastina	26,58 K	23,7%
4	Prednisolona	16,68 K	-
5	Ibuprofeno	12,79 K	5,9%

Top 5 Products With Higher Performane

Rank Var. Abs.	Product	Var. Abs. Unid (K)	Var. PYG%
1	Dalzior (MG)	192,86 K	-
2	Sertralina Generis (MG)	34,21 K	224,8%
3	Ramipril Romace (MG)	27,95 K	-
4	Prednisolona Generis (MG)	16,68 K	-
5	Atorvastatina Aurobindo (MG)	16,23 K	26,6%

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



September 2026

Sales Units PYG% 2,7%

Sales Value PYG% 6,5%

Consumer Healthcare Market – Sell Out Value and Units

September 2026

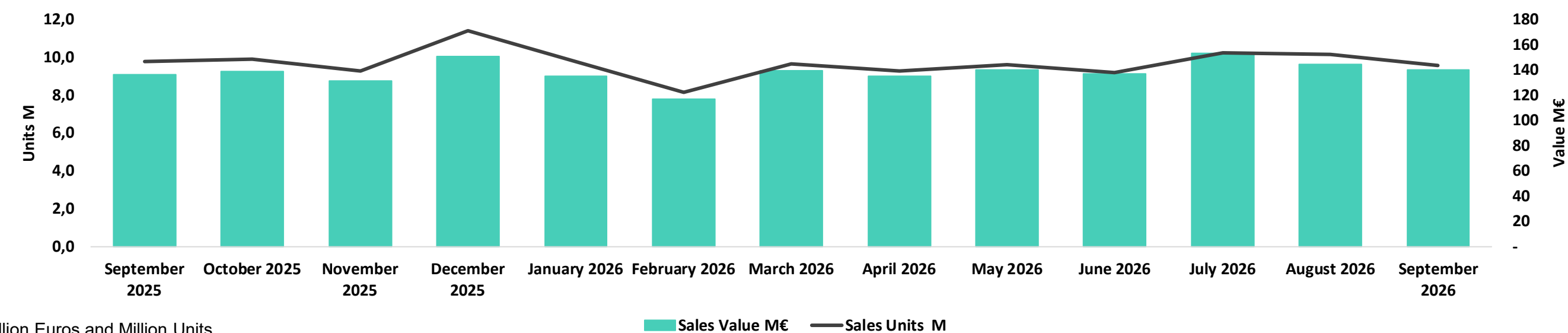
Top 5 HMR 3 With The Most Competitive Dynamics

Rank Var. Abs.	HMR3	Var. Abs. M€ PYG	Var. PYG%
1	H26.4.12. - Medição de glicose contínua	0,97 M€	14,7%
2	H17.9.3. - Protector solar adulto	0,50 M€	30,8%
3	H05.4.1. - Suplementos Magnésio	0,49 M€	19,2%
4	H04.2.5. - Antidiarreicos	0,33 M€	16,9%
5	H26.4.10. - Bombas de insulina e acesssórios	0,30 M€	20,9%

Top 5 Products With Higher Performace

Rank Var. Abs.	PRODUCT	Var. Abs. M€ PYG	Var. PYG%
1	Dexcom G7	0,60 M€	134,4%
2	Theahyabak	0,25 M€	506,0%
3	Bioflavonóides Vasoflon	0,23 M€	-
4	Magnesium-OK Mulher 50+	0,22 M€	603,8%
5	Uriage Xemose C8+	0,21 M€	937,1%

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



September 2026

Sales Units PYG% -2,0%

Sales Value PYG% 2,7%

Consumer Health Segments Performance - Top 5 Products With Higher Performane

September 2026

OTC

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	720.909 €	1,6%	3,7%
1	Bioflavonóides Vasoflon	229.603 €	-	
2	Pankreoflat	171.592 €	3358,3%	8,4%
3	Bilastina Allerzin (MG)	120.267 €	-	
4	Fenistil	114.821 €	27,2%	7,1%
5	Nurofen Xpress Minicaps (MG)	106.768 €	2098,2%	1,9%

Supplements

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	105.392 €	0,4%	3,7%
1	Magnesium-OK Mulher 50+	221.682 €	603,8%	44,2%
2	ZzzQuil Sono	139.136 €	436,3%	9,2%
3	Pure Encapsulations Magnésio	121.115 €	181,6%	6,9%
4	Fisiogen Ferro Forte	114.671 €	30,6%	2,1%
5	ZzzQuil Sono Forte	54.905 €	59,7%	0,4%

Personal Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	589.416 €	2,5%	4,4%
1	Uriage Xemose C8+	206.863 €	937,1%	5,5%
2	Filorga Pro-Collagen Micro-Growth Factor	187.562 €	-	
3	Anthelios	75.906 €	33,3%	2,4%
4	Avène Solar	73.850 €	23,9%	9,3%
5	Cicalfate+	73.677 €	20,7%	9,3%

Consumer Health Segments Performance - Top 5 Products With Higher Perfomance

September 2026

Patient Care

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	1.349.813 €	3,9%	7,1%
1	Dexcom G7	601.378 €	134,4%	0,0%
2	Theahyabak	246.180 €	506,0%	6,8%
3	Accu-Chek SmartGuide	201.046 €	18752,2%	-18,7%
4	Medtronic Guardian 4	168.276 €	24,2%	0,0%
5	Medtronic MiniMed Quick-set	161.737 €	99,5%	0,0%

Nutrition

Rank Var. Abs.	PRODUCT	Var. Abs. Value	PYG %	Average Price Growth (PYG) %
	Total Market	907.940 €	20,0%	4,4%
1	Meritene Clinical Diabet	77.223 €	-	
2	Meritene Clinical Extra Protein	75.155 €	82,8%	2,7%
3	Vitaflo TYR Sphere20	56.456 €	-	
4	Meritene Clinical Protein 1.25	54.725 €	-	
5	Fortimel Compact Protein	53.400 €	45,5%	-0,7%

Veterinary Market – Sell Out Value and Units

September 2026

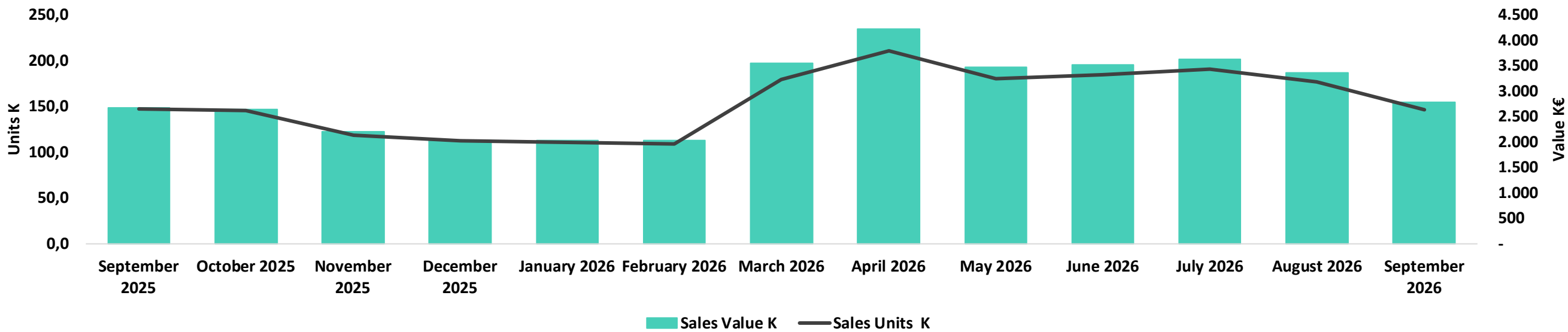
Top 5 HMR 3 With The Most Competitive Dynamics

Rank	Var. Abs.	HMR3	Var. Abs. Value	Var. PYG%
1		H21.2.1. - Insecticidas e ectoparasitcidas	80.660 €	8,1%
2		H21.2.3. - Antiparasitários internos e externos	31.731 €	12,3%
3		H21.11.1. - Terapêutica cardíaca	22.917 €	22,6%
4		H21.13.1. - Antineoplásicos	10.077 €	51,1%
5		H21.4.2. - Vacinas	8.686 €	38,0%

Top 5 Products With Higher Perfomance

Rank	Var. Abs.	PRODUCT	Var. Abs. Value	Var. PYG%
1		AdTab	40.488 €	31,7%
2		Amflee Combo	19.985 €	43,5%
3		Cardisure Flavoured	15.605 €	31,8%
4		Nexgard Spectra	15.121 €	15,7%
5		Zenrelia	14.162 €	-

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



September 2026

Sales Units PYG% -0,8%

Sales Value PYG% 3,7%

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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