



Bepanthen[®]

Baby & Kids
Repeatable
Growth
Model

Bayer Consumer Health
2025

Bepanthen[®]



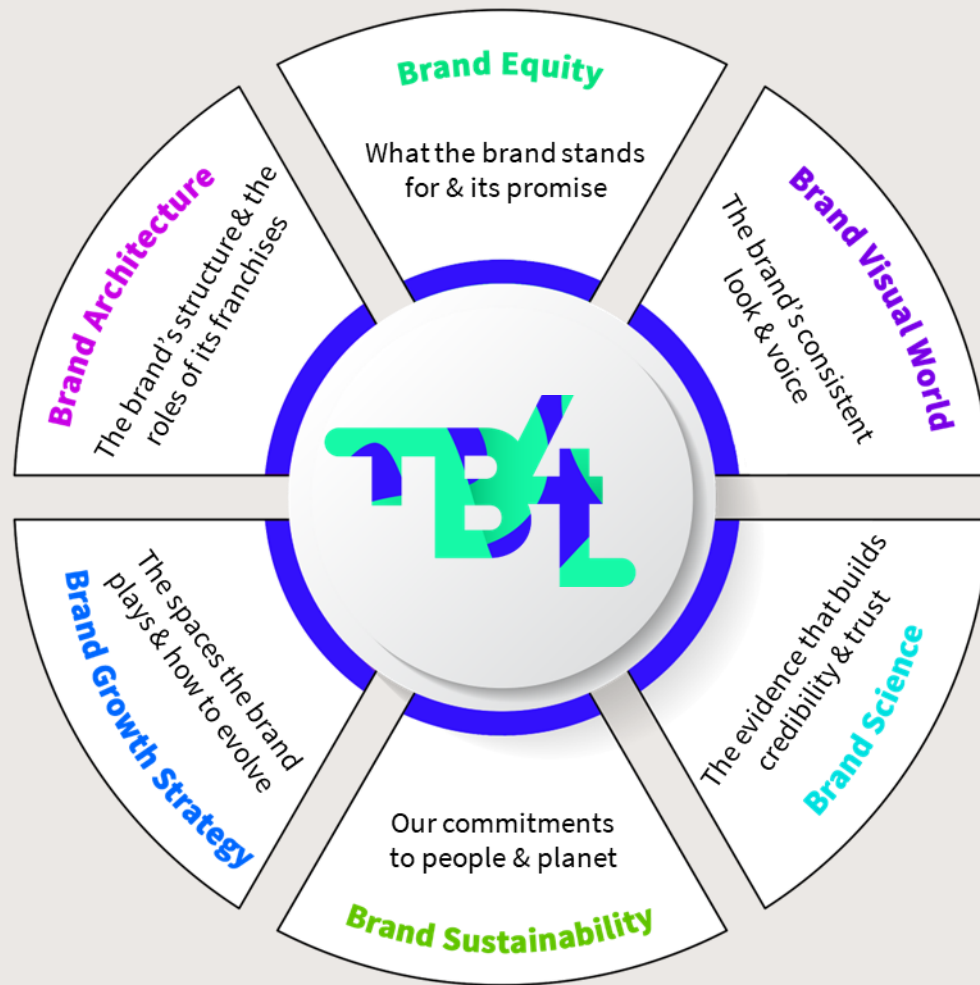
Welcome

This document was created to provide you with a **guidance on how to grow Bepanthen in the Baby & Kids Skin Health category based on learnings proven to work in markets** with positive track record of success **and therefore recommended to be repeated and scaled** across the globe. To grow Bepanthen Baby is a fundamental intent on our strategic journey to becoming a more holistic, loved, skin health megabrand.

With any questions and for further details, please reach out to your Bepanthen Megabrand Leadership Team.

Wishing you much success,

Your Bepanthen Megabrand team



The **6Bs of the Brand Frames of Bepanthen** outline the unwavering principles and guardrails that inform the commercial direction of the Bepanthen Megabrand including where to play choices and market development model for the entire portfolio.

The Baby & Kids Repeatable Growth Model provides with further guidance on how to win for sustained growth and success in market, specific to Bepanthen Baby.

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A close-up photograph of a woman's hands applying a white cream to a baby's chest. The baby is lying down, looking up at the camera with a slight smile. The background is a soft, out-of-focus white fabric. A solid pink vertical bar is on the right side of the image.

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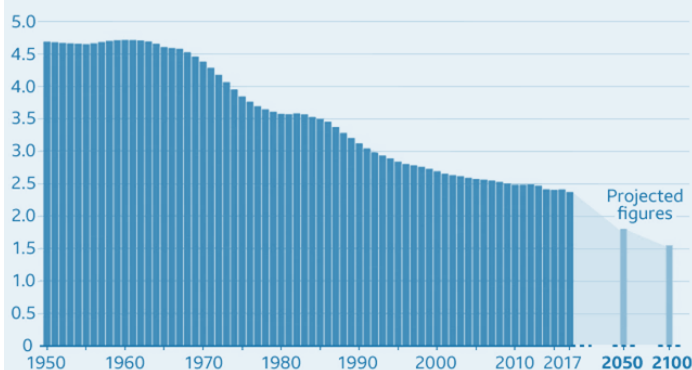


Category dynamics: Baby & Kids Skin Health continues to grow despite declining birth rates

Birth rates are declining globally

- ✓ Women are having **fewer children**
- ✓ Globally, birth rate is projected to continue to decrease in coming decades, **despite a relative stabilization in Bepanthen markets** in comparison to the rapid fall of the past 50 years

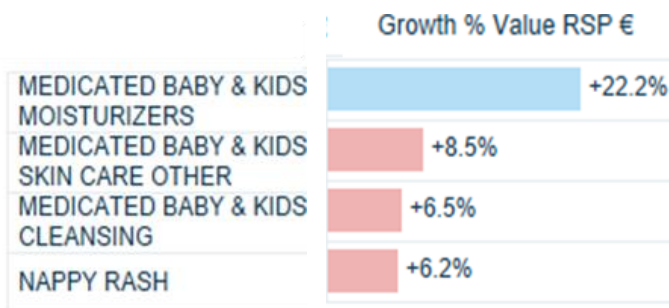
Global fertility rate (livebirths per woman)



Source: Institute for Health Metrics and Evaluation at the University of Washington

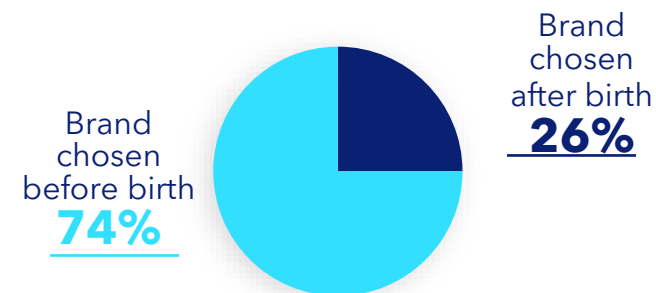
Yet, category growth is sustained by Frequency and Omnichannel

- ✓ More skin health-conscious parents **spend more and more often**, on nappy rash but **also baby skincare**
- ✓ **Omnichannel dynamic boosting category** as consumers see a product online and buy it in the store, and vice versa



Source: M360, SAM, global, Medicated Baby & Kid skin, MAT May 2025

Pregnancy is the key moment of brand choice



After the birth, did you continue using the brand chosen during pregnancy or start using another brand?

74% continued using the brand chosen during pregnancy

26% started using another brand, different from the one chosen during pregnancy

Source: U&A Bepantol Baby 2022 Brazil



Growth audience & sub-segments

Category Users and Prospects

All Parents Expecting And With Children Under 10 yrs of age

Category buyers



Expecting parents

Growth Audience and Sub-segments

Skin Conscious Parents

All expecting parents and parents with a child up to 5yrs of age conscious about their child's skin health

Expecting parents

Preparing for the arrival of a baby, open for education and information

Reactive parents

Typically approach skin health reactively, treat when symptoms arise

Preventative parents

Holistically care for baby skin with preventative approach using a daily regimen

Jobs To Be Done

(Examples - to be adapted if needed based on local context)

Get Expecting Parents To buy Bepanthen nappy rash ointment as part of the preparation for the arrival of their baby By convincing them that only Bepanthen Baby provides complete protection from nappy rash whilst being gentle even on newborn skin

Get Reactive Parents To choose Bepanthen nappy rash ointment in case of nappy rash AND to use it preventatively at every nappy change By convincing them about the superior gentle efficacy of Bepanthen Baby to treat AND to prevent nappy rash

Get Preventative Parents who already trust and buy Bepanthen for nappy rash To adopt new Bepanthen Baby & Kids moisturizing and bathing products into their baby skin routines By raising awareness and driving trial for the new Bepanthen Baby & Kids range

3 key growth pillars in our baby markets

connected to the 3 sub-segments of our growth audience and relevant JTBDs



1. Recruit expecting and newborn parents to adopt our core nappy rash products by being present with the right message in key moments of decision



Drive penetration of nappy rash ointment and products



2. Convince reactive parents to use our core nappy rash products at every nappy change by educating them on how Bepanthen effectively treats but also prevents nappy rash



Drive penetration and frequency of use for nappy rash ointment and products



3. Expand into new baby skin care segments for holistic parents, and be present in more moments of use



Drive frequency of use and basket size for Bepanthen with new daily baby & kids skincare range





Growth pillar #1

Recruit expecting and newborn parents to adopt our core nappy rash products by being present with the right message in key moments of decision

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Recruiting expecting and newborn parents to adopt our core nappy rash products

Key activation pillars for a best-in-class support plan

01

Always there where she/he looks for us

- ✓ **Distribution where she/he most often shop for nappy rash products**, ie baby aisle in pharmacies, Ecommerce and drugstores
- ✓ **(e)POS superior visibility**, with superior share of shelf, right key words, POSM/content with superiority claims, promotions, ecom packs
- ✓ **Always-on Search**
- ✓ **Website content** for baby care & new parents



02

Sampling & trial for new parents

- ✓ **Sampling at birth** (e.g. 3.5g or 10g) via birth boxes or partnerships, aim to **reach minimum 80% of new births annually**
- ✓ **Small selling size** (e.g. 30g) **available as trial size**



03

Pediatrician Recommendation

- ✓ Pediatrician **education** (physical and/or digital) **and sampling (e.g. 10g)**
- ✓ **Participation in pediatric congresses and neonatal courses**
- ✓ **Round table meetings for differentiation points vs competition**



04

Targeted awareness for parents-to-be and new parents

- ✓ **Targeted TV/Digital** advertising for parents-to-be and new parents, with popularity (#1 nappy rash brand) and 'gentle efficacy' messages
- ✓ **Influencer collaborations:** Doctor influencers, Mumfluencers
- ✓ **Partnerships** with baby/pregnancy-related platforms and brands
- ✓ **Pre-birth education via clinic/OBGYN/midwives/new parent courses**



Enabler: Right Regulatory status to enable above activities, incl. considering a Cosmetic UI for sampling if OTC status is too limiting

Cascading choices: 1) Always there where she/he looks for us, 2) Sampling & trial, 3) Pediatrician recommendation, 4) Targeted awareness

Recruiting expecting and newborn parents to adopt our core nappy rash products

Available consumer claims, for the right message at category point of entry

Driving adoption with expecting and newborn parents	<ol style="list-style-type: none"> 1. Use Bepanthen Baby from birth on to protect your baby's bottom from nappy rash 2. Gentle enough to use from birth on 3. Suitable for newborn and even premature babies 4. If locally relevant: #1 nappy rash brand in 'XY' country / Trust the #1 nappy rash brand
Efficacy claims	<ol style="list-style-type: none"> 1. Clinically proven protection from nappy rash (cosmetic) / Clinically proven to treat and prevent nappy rash (OTC) 2. Complete protection from nappy rash 3. Designed to soothe, repair and protect 4. Protects from nappy rash and soothes from 1st application 5. Forms a transparent breathable layer on baby's tender skin that let's the skin breathe 6. Instantly forms an effective lipid barrier against excessive moisture and urine to protect from the causes of nappy rash 7. Overnight protection: Provides long-lasting protection for up to 10 hours throughout the night 8. Creates a strong protective, flexible layer that bends and flexes with baby's movement without cracking or crumbling 9. Aids natural skin recovery: pro-vitamin B5 is rapidly absorbed to enhance natural cell renewal 10. Dermatologically tested and scientifically proven
Safety & gentleness	<ol style="list-style-type: none"> 1. Free from preservative, fragrance, colorants and allergens 2. Gentle formula suitable even for newborn and premature babies 3. Suitable for all skin types including sensitive skin 4. Gentle yet effective formula ideal for use at every nappy change 5. Enriched with provitamin B5, lipids and natural almond oil 6. Low friction formulation, making it easy to apply to skin without causing further irritation 7. Preservative-free formula delivered in a tube to maintain product hygiene and stability by preventing the entry of air and dust 8. If locally feasible by regulation: hypoallergenic
HCP credentials	<ol style="list-style-type: none"> 1. Tested with pediatricians and dermatologists
Consumer endorsement	<ol style="list-style-type: none"> 1. 88% of caregivers plans to repurchase Bepanthen Baby ointment again 2. 85% of caregivers would recommend Bepanthen Baby ointment 3. 96% of the caregivers and mothers agree that Bepanthen ointment is easy to clean/remove from the baby skin 4. 77% of caregivers reported that application of Bepanthen Baby Ointment before bedtime reduced the level of sleep disturbance experienced by babies due to nappy rash
Value for money	<ol style="list-style-type: none"> 1. A little goes a long way: <ul style="list-style-type: none"> o Bepanthen Baby 100g lasts for up to 430 nappy changes o Bepanthen Baby 30g lasts for up to 130 nappy changes

Important note: For claims, always consult the labelling document as well as refer to your local Legal, Medical, Regulatory colleagues to ensure compliance with local regulations.

Recruiting expecting and newborn parents to adopt our core nappy rash products

Recommended key consumer claims by category context

Market position / Category context	Context 1: Nappy rash is an under-developed category	Context 2: Nappy rash is developed and Bepanthen is market leader	Context 3: Nappy rash is developed, and main competitors have zinc oxide formulas	Context 4: Nappy rash is developed, and main competitors are 5% dexpanthenol generics
Recommended key relevant claims to activate	<ol style="list-style-type: none"> Use Bepanthen Baby at every nappy change to protect your baby's bottom from getting red With Bepanthen Baby ointment babies are 3x more protected against red bottom Designed to soothe, repair and protect Clinically proven gentle yet effective nappy care ideal for use at every nappy change from birth on Tested with pediatricians and dermatologists 	<ol style="list-style-type: none"> Use Bepanthen Baby from birth on to protect your baby's bottom from nappy rash Gentle enough to use from birth on Suitable for newborn and even premature babies Trust the #1 nappy rash brand Tested with pediatricians and dermatologists 	<ol style="list-style-type: none"> Use Bepanthen Baby from birth on to protect your baby's bottom from nappy rash Tested with pediatricians and dermatologists, and gentle enough even for premature babies Forms a transparent breathable layer on baby's tender skin that let's the skin breathe Creates a strong protective, flexible layer that bends and flexes with baby's movement without cracking or crumbling Preservative-free formula delivered in a tube to maintain product hygiene and stability by preventing the entry of air and dust (<i>specific to competition packed in a jar/tub like Sudocrem</i>) 	<ol style="list-style-type: none"> Use Bepanthen Baby from birth on to protect your baby's bottom from nappy rash Clinically proven to be gentle enough for newborn and even premature babies* Provides long-lasting protection for up to 10 hours throughout the night* Scientifically proven 3x times more protection against nappy rash* Tested with pediatricians and dermatologists*

*Claims specific to Bepanthen due to clinical studies with our own formulation and are unique to the brand vs dexpanthenol generics

Important note: For claims, always consult the labelling document as well as refer to your local Legal, Medical, Regulatory colleagues to ensure compliance with local regulations.

A woman with dark hair is leaning over a baby who is lying on a bed. The woman is kissing the baby's forehead. The baby is wearing a green shirt and a white diaper. The woman is wearing a light-colored top. The background is a blurred room with a window and some furniture.

Growth pillar #2

Convince reactive parents **to use our core nappy rash products at every change** by **educating** them on how Bepanthen effectively treats but also prevents nappy rash

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Convincing reactive parents to use our nappy rash products at every change

Key activation pillars for a best-in-class support plan

01

Targeted education on nappy rash/care for new parents

- ✓ **Targeted TV/Digital** advertising for new parents with nappy rash treatment and prevention messages
- ✓ **New parents education booklet** on nappy rash prevention and product usage, via digital content, birth box, materials to be handover by pediatricians/clinics..



Don't Wait For Nappy Rash, Prevent It, with the right care at every change

02

Right pack sizes for regular use

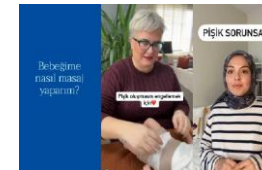
- ✓ **Big pack sizes being marketed, sufficiently distributed and visible** to enable regular use (100g, 200g)



03

KOLs to re-inforce the importance of regular nappy care

- ✓ **Influencers collaborations:** HCP/Pediatrician and Mumfluencers
- ✓ **Partnerships** with baby/pregnancy-related platforms and brands



04

Always there when parents research nappy rash prevention

- ✓ **Always-on Search**
- ✓ **Website content** for on nappy rash prevention and nappy rash products usage

Bepanthol® Baby

Diaper Rash Prevention

- Change your baby's diaper frequently during the day.
- Make sure you are using the correct diaper size. If the gland is too tight, it can cause irritation.
- Allow the air to touch your baby's bottom as often as possible. For example, let your baby go diaper-free for a short period of time every day.
- Don't forget to take clean diapers with you when you go out, so your baby doesn't come into contact with a contaminated diaper for too long.
- Use only water when cleaning your baby's diaper.
- After cleaning, let your baby's bottom dry for a while.
- You can safely use Bepanthol Baby Anti-Rash Ointment for every diaper change to protect against diaper rash. With its preservative, perfume, paraben, SLS-free structure, it helps to keep baby skin moist, soft, smooth and supple by protecting the natural barrier of the skin.



Enabler: Right Regulatory status to enable above activities, incl. considering a Cosmetic UI for sampling if OTC status is too limiting

Cascading choices: 1) Targeted education, 2) Right pack sizes, 3) KOLs support, 4) Always-on nappy rash prevention content

Convincing reactive parents to use our nappy rash products at every change

Available consumer claims, to drive regular preventative nappy care

Drive preventative usage at every nappy change as opposed to treating when symptoms appear	<ol style="list-style-type: none"> 1. Use Bepanthen Baby at every nappy change to protect from nappy rash / your baby's bottom from getting red 2. With Bepanthen Baby ointment babies are 3x more protected against nappy rash / 3x times more protection against nappy rash 3. Clinically proven gentle yet effective nappy care ideal for use at every nappy change 4. If locally relevant: #1 nappy rash brand in 'XY' country / Trust the #1 nappy rash brand
Efficacy claims	<ol style="list-style-type: none"> 1. Clinically proven protection from nappy rash (cosmetic) / Clinically proven to treat and prevent nappy rash (OTC) 2. Complete protection from nappy rash 3. Designed to soothe, repair and protect 4. Forms a transparent breathable layer on baby's tender skin that let's the skin breathe 5. Instantly forms an effective lipid barrier against excessive moisture and urine to protect from the causes of nappy rash 6. Overnight protection: Provides long-lasting protection for up to 10 hours throughout the night 7. Creates a strong protective, flexible layer that bends and flexes with baby's movement without cracking or crumbling 8. Aids natural skin recovery: pro-vitamin B5 is rapidly absorbed to enhance natural cell renewal 9. Dermatologically tested and scientifically proven
Safety & gentleness	<ol style="list-style-type: none"> 1. Free from preservative, fragrance, colorants and allergens 2. Suitable for newborn and even premature babies 3. Suitable for all skin types including sensitive skin 4. Enriched with pro-vitamin B5, lipids and natural almond oil 5. Preservative-free formula delivered in a tube to maintain product hygiene and stability by preventing the entry of air and dust 6. If locally feasible by regulation: hypoallergenic
HCP credentials	<ol style="list-style-type: none"> 1. Tested with pediatricians and dermatologists
Consumer endorsement	<ol style="list-style-type: none"> 1. 88% of caregivers plans to repurchase Bepanthen Baby ointment again 2. 85% of caregivers would recommend Bepanthen Baby ointment 3. 96% of the caregivers and mothers agree that Bepanthen ointment is easy to clean/remove from the baby skin 4. 77% of caregivers reported that application of Bepanthen Baby Ointment before bedtime reduced the level of sleep disturbance experienced by babies due to nappy rash
Value for money	<ol style="list-style-type: none"> 1. A little goes a long way: <ul style="list-style-type: none"> o Bepanthen Baby 100g lasts for up to 430 nappy changes o Bepanthen Baby 30g lasts for up to 130 nappy changes

Important note: For claims, always consult the labelling document as well as refer to your local Legal, Medical, Regulatory colleagues to ensure compliance with local regulations.

Convincing reactive parents to use our nappy rash products at every change

Recommended consumer claims by category context

Market position / Category context	Context 1: Nappy rash is developed and Bepanthen is market leader	Context 2: Nappy rash is developed, and main competitors have zinc oxide formulas	Context 3: Nappy rash is developed, and main competitors are 5% dexpanthenol generics
Recommended key relevant claims to activate	<ol style="list-style-type: none"> 1. Don't wait for nappy rash: use Bepanthen Baby at every nappy change to protect from nappy rash / your baby's bottom from getting red 2. With Bepanthen Baby ointment babies are 3x more protected against nappy rash / 3x times more protection against nappy rash 3. Clinically proven gentle yet effective nappy care ideal for use at every nappy change 4. Trust the #1 nappy rash brand 5. Tested with pediatricians and dermatologists 	<ol style="list-style-type: none"> 1. Don't wait for nappy rash: use clinically proven Bepanthen Baby at every nappy change to protect from nappy rash / your baby's bottom from getting red 2. With Bepanthen Baby ointment babies are 3x more protected against nappy rash / 3x times more protection against nappy rash 3. Tested with pediatricians and dermatologists, and gentle enough even for premature babies 4. Forms a transparent breathable layer that let's the skin breathe and flexes with baby's movement without cracking or crumbling 5. Preservative-free formula delivered in a tube to maintain product hygiene and stability by preventing the entry of air and dust (specific to competition packed in a tub/jar like Sudocrem) 	<ol style="list-style-type: none"> 1. Don't wait for nappy rash: use clinically proven Bepanthen Baby at every nappy change to protect from nappy rash / your baby's bottom from getting red 2. Scientifically proven 3x times more protection against nappy rash* 3. Provides long-lasting protection for up to 10 hours throughout the night* 4. Clinically proven formula enriched with pro-vitamin B5, lipids and natural almond oil 5. Tested with pediatricians and dermatologists, gentle enough even for newborns and premature babies*

*Claims specific to Bepanthen due to clinical studies with our own formulation and are unique to the brand vs dexpanthenol generics

Important note: For claims, always consult the labelling document as well as refer to your local Legal, Medical, Regulatory colleagues to ensure compliance with local regulations.

A woman with long brown hair is lying on a bed, smiling and holding the hands of a baby who is lying on their back. The woman is wearing a white top and the baby is wearing a white onesie. The bed has a white patterned sheet. The background is a simple room with a white headboard and a dark wall.

Growth pillar #3

Expand into **new baby skin care segments** for holistic preventative parents, and **be present in more moments of use**

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Expanding into new baby skin care segments and be part of more moments of use

Key activation pillars for a best-in-class support plan (New Baby & Kids range)

01

Right instore placement and visibility to enable cross-purchase

- ✓ **Distribution where she/he most often shop for baby& kids skin care products**, ie baby aisle in pharmacies, Ecommerce and drugstores
- ✓ **Shelving in proximity to Bepanthen nappy rash ointment and co-promotions** (if possible), to enable cross purchase within Bepanthen
- ✓ **(e)POS superior visibility**, with superior share of shelf, right key words, POSM/content with superiority claims, promotions, ecom packs



02

Sampling for new parents, together with Bepanthen nappy rash

- ✓ **Inclusion of samples in birth boxes**, together with Bepanthen nappy rash ointment, , aim to **reach minimum 80% of new births annually**



03

Targeted awareness to Bepanthen nappy rash users

- ✓ **TV/Digital communication together with Bepanthen nappy rash**, as a range or tag
- ✓ **Inclusion in Bepanthen nappy rash Influencers collaboration /posts** (HCP or Mumfluencers) and **pre-birth education**
- ✓ **Digital communication targeted to Bepanthen nappy rash users**



04

Pediatrician recommendation, together with Bepanthen nappy rash

- Associate the new baby & kids skin care range to Bepanthen nappy rash:
- ✓ Pediatrician **education** (physical and/or digital) **and sampling**
- ✓ **Participation in pediatric congresses and neonatal courses**
- ✓ **Round table meetings for differentiation points vs competition**



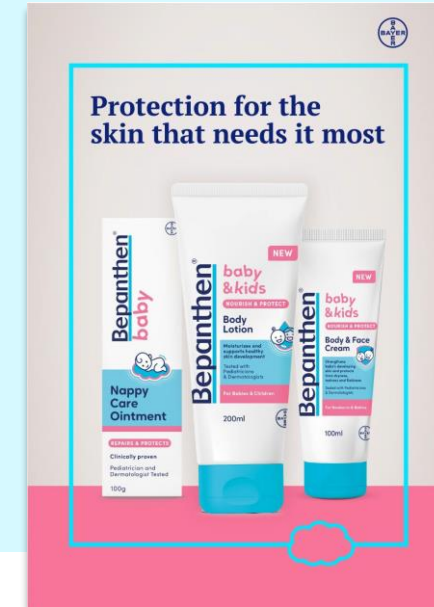
Enabler: Right Regulatory status to enable above activities, incl. considering a Cosmetic UI for sampling if OTC status is too limiting

Cascading choices: 1) Right instore placement and visibility, 2) Sampling, 3) Targeted awareness, 4) Pediatrician recommendation.

Expanding into new baby skin care segments and be part of more moments of use

Key claims to drive entire Bepanthen Baby & Kids range*

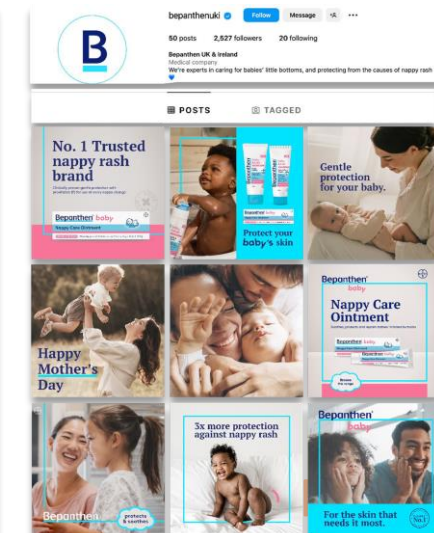
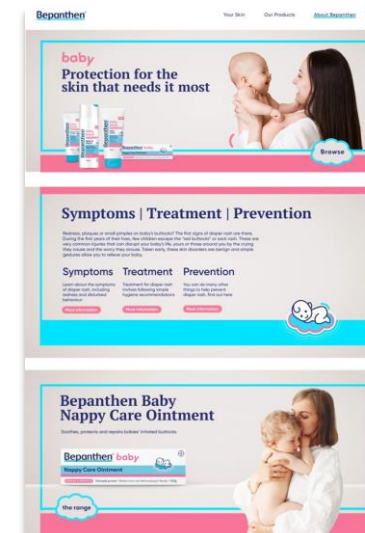
<p>Drive frequency of use and basket size for entire Bepanthen Baby range, including new daily baby & kids skincare range and nappy rash</p>	<ol style="list-style-type: none"> 1. Protect and nourish your baby's skin with Bepanthen's scientifically proven solutions 2. Clinically proven range that protects and nourishes your baby's skin 3. Gentle yet effective skin health solutions proven to keep your baby's skin healthy and protected 4. Keep your baby's skin healthy and protected with Bepanthen's scientifically proven skin health solutions 5. Trust Bepanthen's skin care routine of gentle yet effective skin health solutions 6. Protection for the skin that needs it most
<p>Safety & Gentleness</p>	<ol style="list-style-type: none"> 1. Gentle formulations free from irritants, colorants, fragrances 2. Suitable for newborns / From birth on 3. Suitable for sensitive skin 4. Dermatologically tested 5. Formulated with pro-vitamin B5 6. Trusted brand by generations of parents for over 75 years 7. If locally feasible by regulation: hypoallergenic
<p>HCP credentials</p>	<ol style="list-style-type: none"> 1. Tested with pediatricians and dermatologists 2. In line with latest pediatric skincare guidelines



*The above outlined claims are relevant for the entire Bepanthen Baby range introducing the whole portfolio (nappy care ointment, baby moisturizers and baby cleansing products) to promote the range together, see example assets on this page.

For product-specific claims refer to the labelling document of the formulation, and as guidance to the Baby & Kids Launch Toolkit.

Important note: For claims, always consult the labelling document as well as refer to your local Legal, Medical, Regulatory colleagues to ensure compliance with local regulations.



Path For Growth: Market Development Model

Building the Baby & Kids Skin Health portfolio

	Path	Objective	Bepanthen Megabrand Portfolio Expansion	When to expand				
STEP 1 ➤	Build Base	<p>Establish healing credentials by entering the category in nappy rash heartland to build PENETRATION</p> <p>Refresh: While building the portfolio, keep the core fresh for protection over time (large value pack size 150g+; format renovation, e.g. spray)</p>	<div style="border: 1px solid #00AEEF; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;">NAPPY RASH</p> <p style="text-align: center;">Repairing and protecting nappy ointment</p> <p style="text-align: center;">HEAL SKIN</p> </div> <div style="border: 1px solid #00AEEF; padding: 5px;"> <p>Refresh core nappy rash</p> </div>	<p>In case not already present in nappy rash, consider launching dedicated portfolio if Bepanthen is under-developed in nappy rash occasion and if size of the prize is sufficient to justify the required investments.</p>				
STEP 2 ➤	Build Breadth	<p>Stretch into the vast baby & kids skin health segments of cleansers, moisturizers, wipes, to unlock FREQUENCY via daily skin health management regimens)</p> <p>Refresh: While building the portfolio, keep the daily skin health fresh for protection over time (e.g. add moisturizer with SPF benefit, add baby lip care, etc.)</p>	<div style="border: 1px solid #00AEEF; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;">BABY & KIDS DAILY SKIN</p> <p style="text-align: center;">Moisturizers and cleansing, bath routines</p> <p style="text-align: center;">PROTECT SKIN</p> </div> <div style="border: 1px solid #00AEEF; padding: 5px;"> <p>Refresh baby daily skincare</p> </div>	<p>Consider expanding in baby & kids daily skin when Bepanthen is among the top 3 nappy rash brands with >20% value share in the channels we play in, and sufficient P&I can be invested without compromising the rest of the brand/our core.</p>				
STEP 3 ➤	Build Depth	<p>With penetration and usage frequency built, ADD VALUE through entering specialized segments from a position of expertise, starting with eczema and continuing with new opportunity fields</p>	<div style="border: 1px solid #00AEEF; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;">BABY & KIDS ECZEMA</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; padding: 5px;"> <p>Flare-up treatment</p> <p>HEAL</p> </td> <td style="width: 50%; padding: 5px;"> <p>Prone skin care regimen</p> <p>PROTECT</p> </td> </tr> </table> <p style="text-align: center; background-color: #00AEEF; color: white; padding: 2px;">➤ VALIDATION</p> <p style="text-align: center;">BABY & KIDS ALLERGIC DERMATITIS</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc; padding: 5px;"> <p>Acute treatment</p> <p>HEAL</p> </td> <td style="width: 50%; padding: 5px;"> <p>Prone skin care regimen</p> <p>PROTECT</p> </td> </tr> </table> </div> <p style="text-align: center; font-size: small;">For illustration only</p>	<p>Flare-up treatment</p> <p>HEAL</p>	<p>Prone skin care regimen</p> <p>PROTECT</p>	<p>Acute treatment</p> <p>HEAL</p>	<p>Prone skin care regimen</p> <p>PROTECT</p>	<p>Consider expanding into specialized segments when Bepanthen is among top 3 medicated baby & kid skin care brands with >20% value share in the channels we play in, and sufficient P&I can be invested without compromising the rest of the brand/our core.</p>
<p>Flare-up treatment</p> <p>HEAL</p>	<p>Prone skin care regimen</p> <p>PROTECT</p>							
<p>Acute treatment</p> <p>HEAL</p>	<p>Prone skin care regimen</p> <p>PROTECT</p>							

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Appendix

Success cases from markets





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**Bepanthen Baby
Success case
Brazil**



From healing heritage to new segments



Bepanthen carries core credentials rooted in skin repair and healing

PHASE 1

Portfolio rooted in skin repair and healing, with HCP credentials

PHASE 2

Extension within skin repair, healing & moisturizing

PHASE 3

Extension towards Daily Skin Care

Core in Brazil

Ointment & Cream



Roche sells Bepanthen to Bayer

Re-launch

Re-launch range as cosmetics



Derma

Core range extension



Daily usage

New sub-segments



Baby Wipes

Dry Skin Dry skin BR: 2021
MX & AND: 2023



Daily Usage

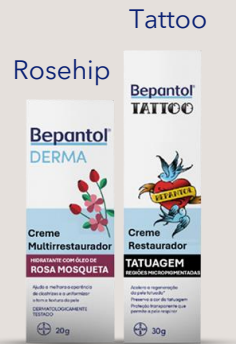
Increase Consumption

Antibacterial Baby Wipes



Daily Usage

Increase Consumption



2005

2011

2019

2021

2024

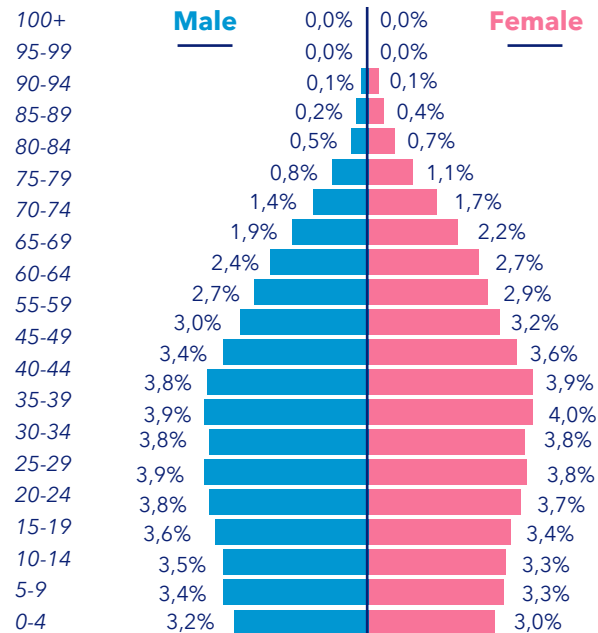
2025



Medicated Baby Skin Category Overview

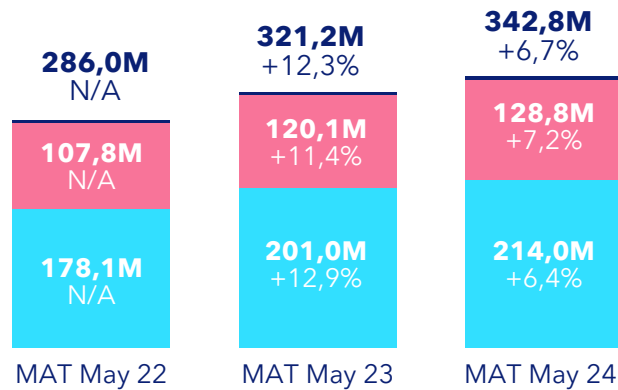
Population Getting Older

Birth Rate is dropping (-11,4% vs last decade)



Category is sustained by Frequency and Omnichannel

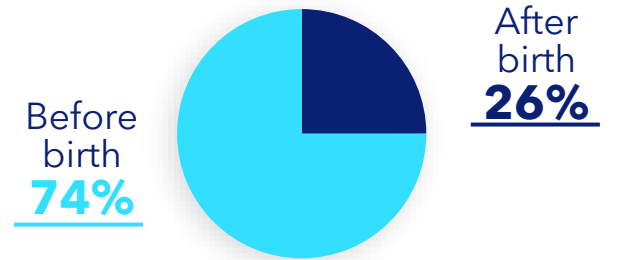
Medicated baby skin



Omnichannel as strategy to guarantee loyalty and frequency:

"Consumers can see a product or a brand on the internet, and buy it in the store (and vice versa)"

Brand chosen during pregnancy



After the birth, did you continue using the brand chosen during pregnancy or start using another brand?

74% continued using the brand chosen during pregnancy

26% started using another brand, different from the one chosen during pregnancy



Consolidated Leadership in the Market

Bepanthen Baby contributes to add value in the category

Bepantol[®] Baby

The most trusted **prevention** brand in BR

➤ Brand n° #1



In **Brand equity**
TOM brand



In **Quality**



In **Prescription**



In **Trust**





Complete portfolio to make the brand even more accessible



Over the years Bepanthen Baby has launched bigger and more affordable nappy rash pack sizes aiming to increase usage and have the right assortment per channel

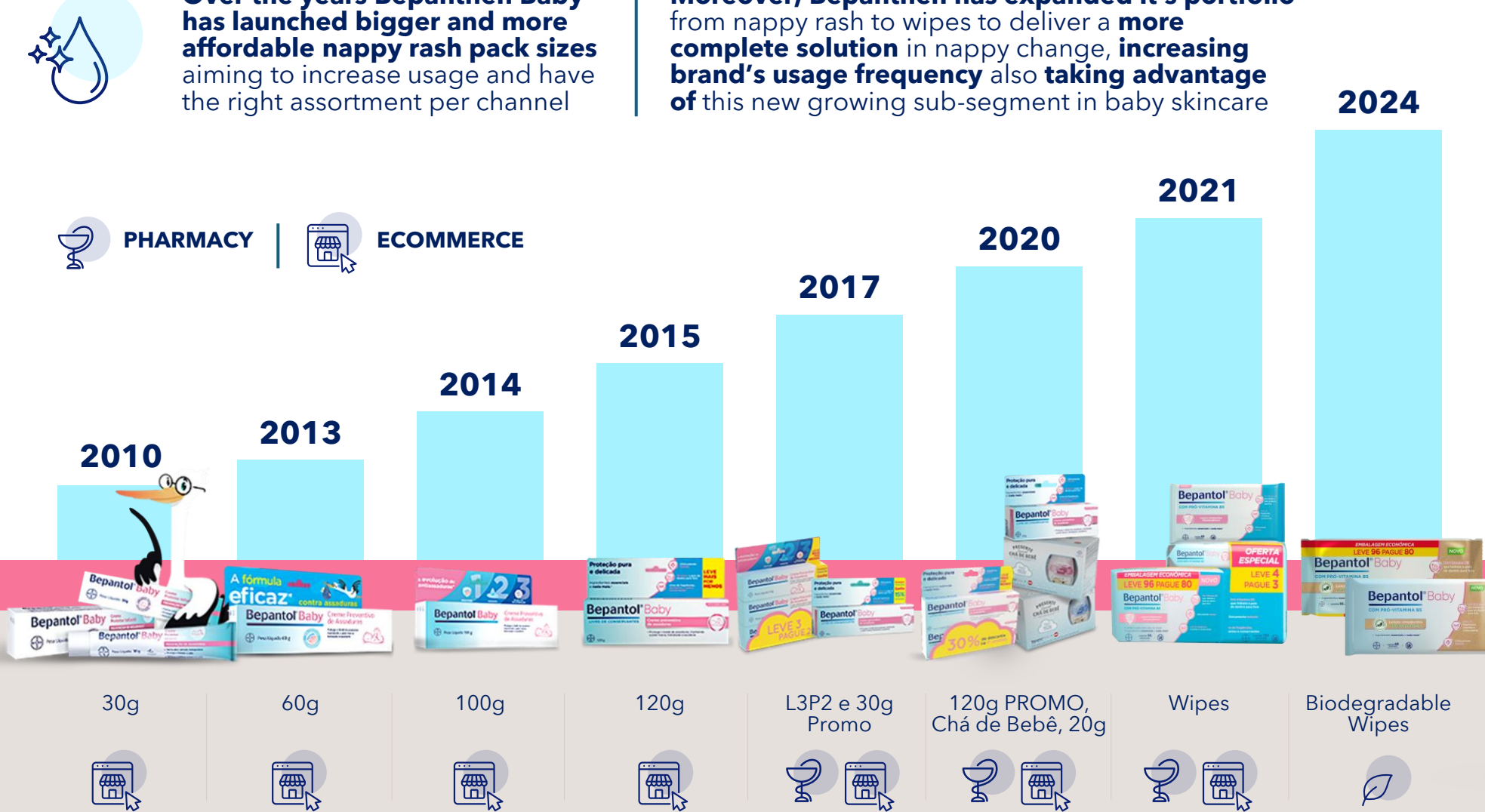
Moreover, Bepanthen has expanded it's portfolio from nappy rash to wipes to deliver a **more complete solution** in nappy change, **increasing brand's usage frequency** also **taking advantage** of this new growing sub-segment in baby skincare



PHARMACY



ECOMMERCE





What is next for Bepanthen Baby in BR?



Expand to new segments **with higher purchase frequency and be present beyond nappy-wearing years**



Launch new daily **skincare range**



Focus on convincing **first-time moms** by being present in **key moments of decision**

Pre-purchase experience



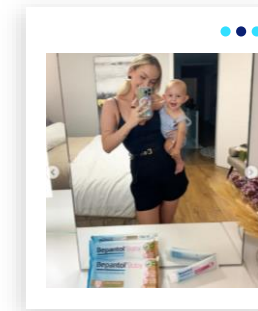
HCP



Digital



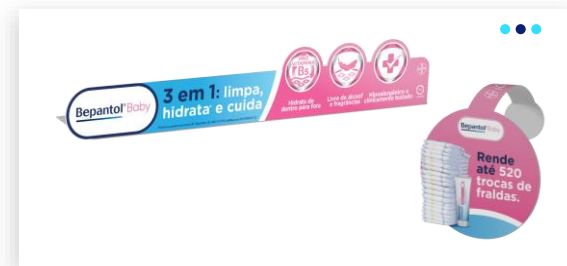
Friends & family



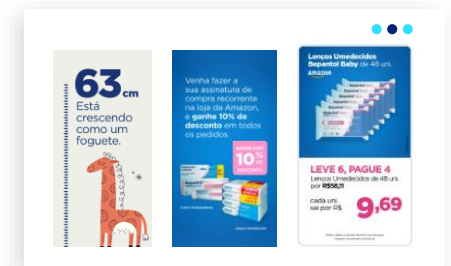
Influencers

Purchase experience

Pos



Chat BOT





Bepanthen[®]

Success case

Turkiye



Bepanthol Journey in Turkey

Dec
2011

Jan
2012

Since
2015

New
Age

2018



Bepanthen
Phase Out in
**Cancellation
of Borderline
Status**

**Transition to
Bepanthol Cream**
with new formulation
Nappy Rash ointment
Switch Pharmacy
Management



Building Portfolio

Baby Eczema
Wound Eye
Dry Skin



**Structural Price
Increases
Strong media
Digital**

**Channel
Expansion**
Baby Stores -
2018
Drugstores -
2019
Full Expansion -
2020



Bepanthol



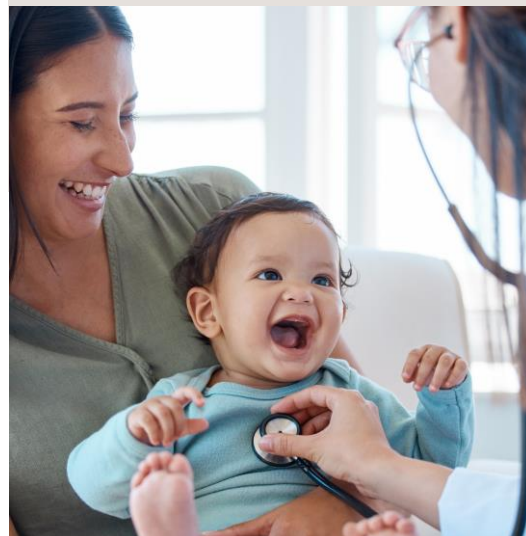
Strong **HCP**
Endorsement
& Advocacy



Leveraging
Physical
Availability
w **Channel
Expansion**



Love Brand
In Turkey



Medicated Skin
Care Heritage
as a **POD**
Strengthen Medicated
Skin Care Equity



Brand Building in Türkiye



Redefining Baby nappy rash by Leading the Shift from Treatment to Prevention

Treatment

MÜKEMMEL KORUMA

Diş çıkarma döneminde bebeğinizin pişgi olma ihtimali artar. Bepanhol Baby Pişgi Önleyici Merhem, onun narin cildini nemlendirerek pişgi karp korumasına yardımcı olur.

2016

MÜKEMMEL KORUMA

Özellikle geceleri, bebeğinizin pişgi olma ihtimali artar. Bepanhol Baby Pişgi Önleyici Merhem, onun narin cildini nemlendirerek pişgi karp korumasına yardımcı olur.

2017

MÜKEMMEL KORUMA

Katı gıda ya geçiş döneminde, bebeğinizin pişgi olma ihtimali artar. Bepanhol Baby Pişgi Önleyici Merhem, onun narin cildini nemlendirerek pişgi karp korumasına yardımcı olur.

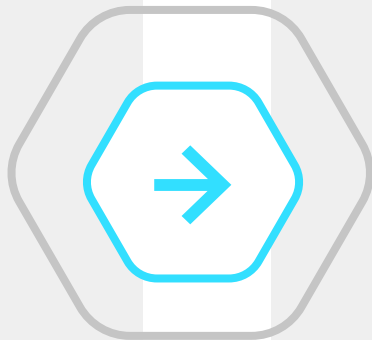
2018



First local Bepanhol Baby Campaign

Driving trial but also usage frequency by introducing new usage occasions based on key moments of nappy rash increase and torture-test situations

"I use Bepanhol Baby **if I see the first signs of redness** especially during teething, transition to solid food **and after long sleeping hours**"



Prevention

Bepanhol Baby ile pişgi bekleme önle!

2019

Bepanhol Baby Pişgi Bekleme, Önle!

1. NUMARALI TERCİH!

2021

Bepanhol Baby Pişgi BEKLEME, ÖNLE!

2024-25



Campaign emphasizing prevention, as well as equal shared parenting responsibilities

Engaging with millennials for the first time demonstrating shared parental duties. Emphasized prevention and «free from» communication.

"I use Bepanhol Baby **daily because it is gentle and free from harmfuls**. It also helps to prevent rash before it occurs, before it interrupts our happy moments"

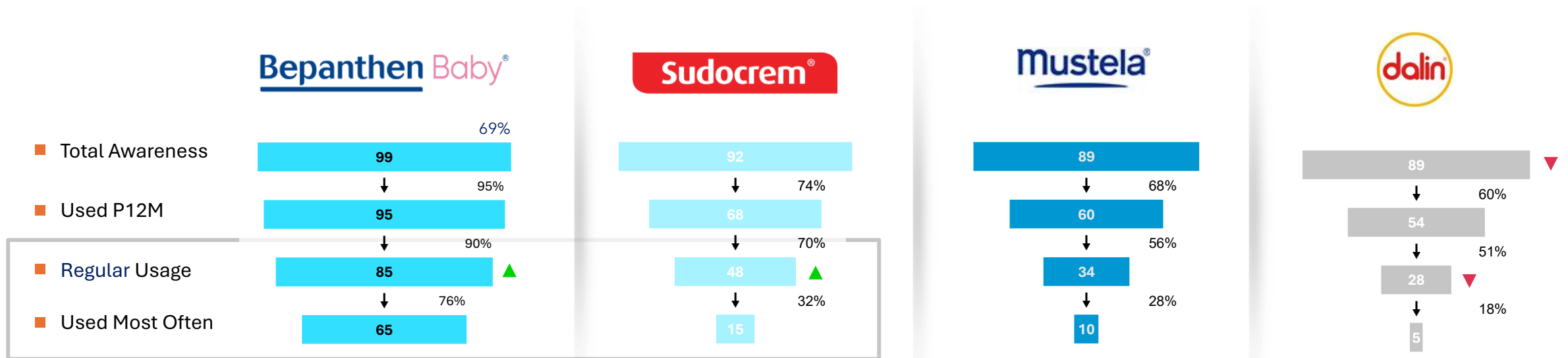


BHT 2024

Brand Funnel

With increasing repertoire behavior, consumers' overall awareness has risen during this period.

Bepanthen Baby and Sudocrem are the brands that **achieved significant increases in their regular user base**, while Dalin and Sebamed experienced notable declines in awareness





JTBD:

Get new parents to use Bepanthol Baby everyday by convincing them that Bepanthol Baby is the expert and the #1 choice of pediatricians in nappy rash prevention

Purpose

Bepanthol Baby has the **greatest brand** power score (33,5%) within the category, with the strongest expert image, driven by the trust and the HCP recommendation

Place

Available in **pharmacies, baby stores, supermarkets, drug stores and online platforms.** A limited visibility on shelves due to crowded portfolios of competitors

Proposition

Bepanthol Baby with it's nappy rash expertise, is **the first brand that comes to mind**

Promotion

(Communication)
Bepanthol Baby is the iconic brand of the category with the **highest awareness scores and the strongest P12 months usage**

Product

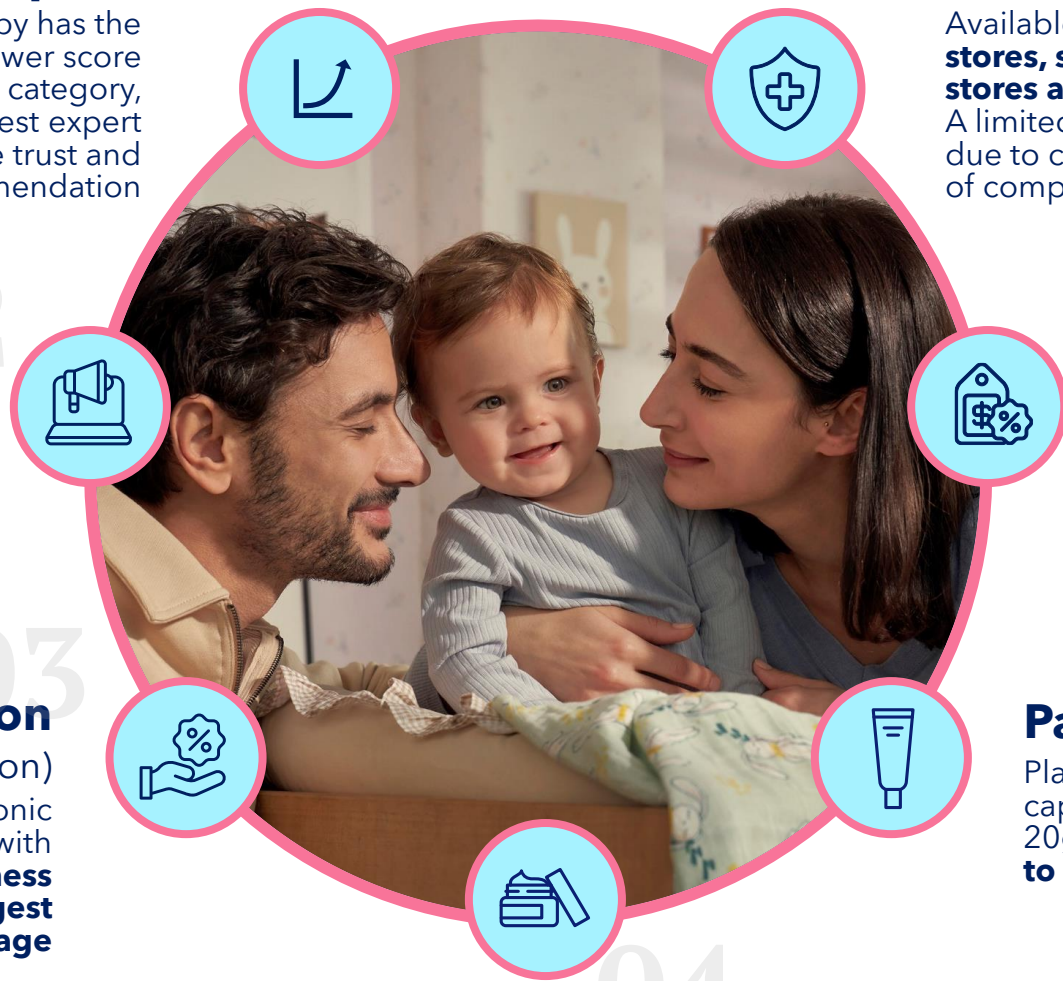
Superior formulation consisting **ProVitamin B5** and strong claims of «**free from**» & «**natural ingredient**» on pack communications

Price

Premium price point (157 ix to Hametan)

Pack

Plastic tube with flip-top cap 3 sizes: 30g, 50g, 100g. 20g sample size. **Easy to use and hygienic.**





The #1 choice of Pediatricians



2.700 Pediatrician detailing with Bepanthol Baby



Year-round support with **HCP materials** and **20g samples**



Participation in **pediatric** congresses and neonatal courses



Round table meetings for **reviewing differentiation points** from Hametan and Sudocrem



Partnership with an HCP Influencer to **educate first time parents**



Embracing the First Moments with Bepanthol® Baby



1 Mio
YEARLY SAMPLE

 **7th Month of Pregnancy**

 **After Birth**

 **6-Month-old Baby**



 **Present-Service**
Türkiye

2025



JAN | FEV | MAR | ABR | MAI | JUN | JUL | AGO | SET | OUT | NOV | DEZ



Digital

Always-on Social & CPAS& Programmatic Video & Search

Adressable TV →

Influencer Collab →

Influencer Collab →

Digital Audio →

Always-on Social & Search →

Always-on Social & Search →

Influencer Collab →

Influencer Collab →

Influencer Collab →

Sampling

750.000 x



Bepanthen[®]



Success case

Russia

Bepanthen Successful Go-To-Market Model

Strengthen BPN leadership and win over generics via superior communication across all 3 channels



Consumer



Shopper



HCP



- **DTC with superiority claim:** “Millions of Moms #StandForOne” focusing on best NR treatment (the only remedy with higher lanolin content)!
- **Holistic Digital Ecosystem to target** highly digitalized TA (Digital share 31%): social media, OLV, Special projects
- Activating new TA of pregnant woman on 3rd trimester with unique content **“Check-list for maternity houses”**



- **Strengthened focus in pharmacy** chains to support consumer journey in trade & protect from switching to generics
- **Win in pharmacies: significant** increase of shelf visibility up to 60% & Shopper navigation between pillars via color-coding POSM
- **Pioneering VR test technology in pharmacy to activate M&B category:** good potential 52% of consumer expect to find NR products there



Engage Pharmacists to drive reco:

- Strengthened focus among sales force driving BPN superiority vs generics

Pediatricians further activations:

- Drive superiority via new claims - pure formula and benefits of higher lanolin content
- Increased coverage of F2F with 1st priority on a visit
- Standalones & Strengthened HCP Digital





In 2021, Bepanthen Baby had 360° support in all key promotional channels

DTC 01

TVC & OLV Always on with no seasonality



Banners for moms and pregnant women - social media, mobile apps, Google & Mail Website & Ecom landings



HCP 02

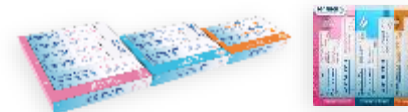
Bepanthen is an absolute leader in prescription rate for NR treatment among competitors with (26% in Q2 2021)

MULTI channel promotion among Pediatricians (F2F visits, HCP digital, conferences, etc)



Trade 03

- Bepanthen is the **leader on shelf with 60% shelf share**
- Layout with **double facings** and POSm with **shopper navigation**



- Focus on **BPN oint 30g** to attract new users and **100g** to increase consumption of loyal consumers at every nappy change
- Secondary placement
- Mother & Baby category
- Premium floor stands



Ecom 04

Bepanthen remains category leader

01. Secondary images implementation



02. e-com always-on approach in Paid Search to be #1 priority



03. eCom Virtual Bundles for Bepanthen with Elevit targeting pregnant women in 3rd trimester



Bepanthen[®]



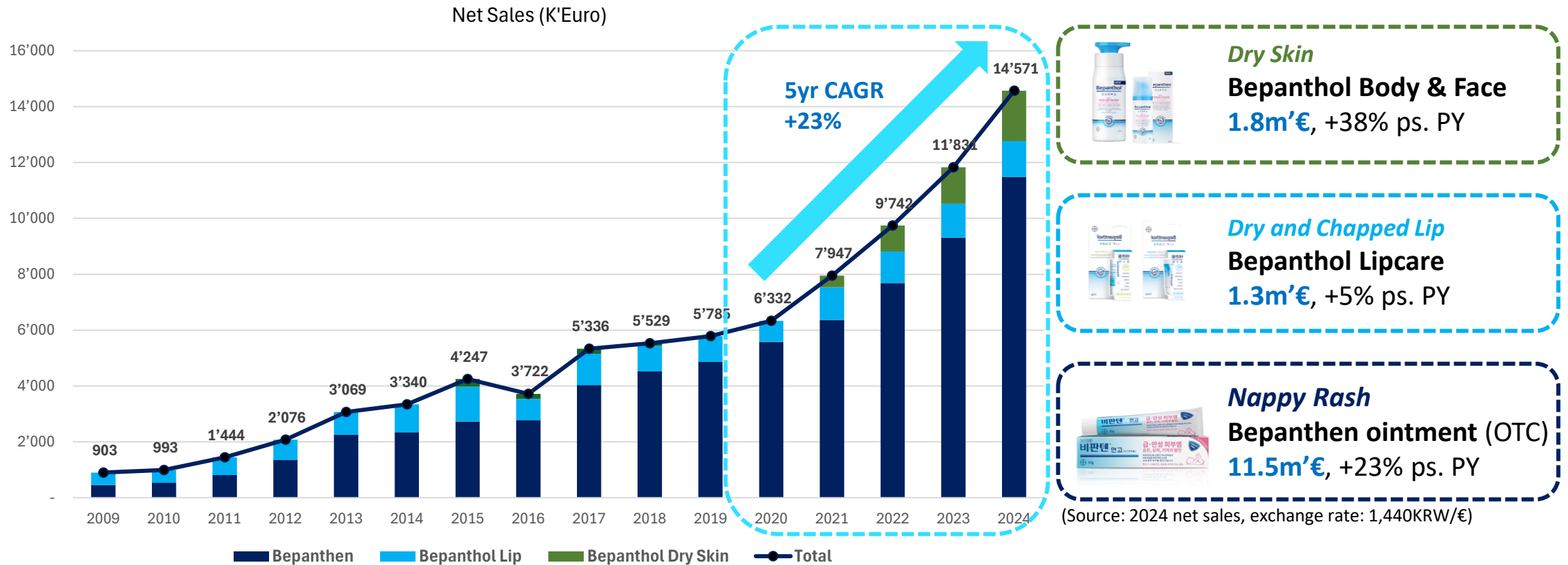
Success case

South Korea



Korea Bepanthen Business Evolution

- **14.6m'€ in 2024, +23% GR vs. PY**
- **Continuous healthy growth of 5yr (2020-2024) CAGR +23%**





Marketing Activities done in prior to build Bepanthen ointment

Korea Case



- #1. Paediatrician**
 Worked as **the strongest foundation for baby business.**
 Operated sales team to visit Paediatricians and participated at conferences

- #2. OB-GYN**
 To drive **synergy with Elevit**, ensured high potential users of Bepanthen Baby, pregnant women, to be aware on Bepanthen's efficacy

- #4 Mom Community**
 To **assure core users** on its efficacy and safety as Moms tend to be dependent on peer group (Online café, Influencer postings)

- #4. Customized creative & Precision MKT**
 (After became sizable business)
 To **strengthen the leadership** in baby segment, having celebrity model and targeting pregnant women and new moms

Baby Rash Skin (Nappy rash, drool rash)



DIAGNOSIS

DEFINE & DESIGN

Market

- Fierce competition with **continuous copy product launches of Dexpanthenol 5% creams**.
4 brands launched in 4 years, 1 more brand to launch in 2025.



Consumer

- Pregnant women preparing for delivery, Moms of young babies below 3 years old. Category entry for Bepanthen.
- Key benefit: Proven brand, Safety**

Competitor

- “D-Panthenol” from Dong-A**
 - > EVI: 126 in MAT Apr'25
 - > Creamy texture: fast-absorbed
 - > Flexible plastic tube: easy to use
 - > Lower RSP, Higher Customer margin

Customer

- Pharmacists – Trying hard to switch Bepanthen seekers to competitors** due to better customer margins (est. 3x higher vs customer margin of Bepanthen)

Bepanthen®

Strengths

- Proven and beloved with no.1 sales
- Superior efficacy with water-in-oil formula
- Clinically proven
- Elevit resources for reaching out pre-Mom

Weakness

- Greasy texture
- Easily breakable Aluminum tube

Target Audience



- Main) **Moms with babies below 3 years old**
- Sub) **Pregnant women preparing for delivery**

Current Behavior

- Compares Bepanthen with D-Panthenol especially at the **“Purchase” stage** in pharmacy

Desired Behavior

- Believe Bepanthen as the best solution for babies with proven efficacy & **stick to it with no further comparison**






Strategy to Overcome Barrier

- Enhance understanding on Bepanthen’s **superiority from formula and packaging & Strengthening a sense of reassurance** by highlighting that their peer group uses and trust Bepanthen.

Competitor overview



Whilst cheaper dexpanthenol 5% Ointment/Cream competition are continually launched (6 copy brands in market, 1 more brand to be launched in 2025), Bepanthen continues to be market leader with 31.5% share of market despite being the most premium.

BRAND	BEPANTHEN Ointment	Dong-A D-panthenol Ointment	Dexpanol Ointment	Kyungdong Panthenol Ointment	Choa.4 D-panthenol Cream
Package					
Classification	OTC	OTC	OTC	OTC	OTC
Form	Ointment	Ointment	Ointment	Ointment	Cream
Ingredient	Dexpanthenol, Beeswax, Cetyl Alcohol, Stearyl Alcohol	Dexpanthenol, 1,2-Pentanediol, Dimethicone, Dipropylene Glycol	Dexpanthenol, Glyceryl Stearate SE, Concentrated Glycerin, Dimethicone	Dexpanthenol, Glyceryl Monostearate, Dimethicone, Methylparaben	Dexpanthenol, Light Anhydrous Silicic Acid, Glyceryl Monostearate, Dimethicone
Key Claim Highlights on Pack (Indication All Same)	Nappy rash, acute and chronic dermatitis, eczema, wounds. Skin regeneration & Damaged barrier recovery	Dermatitis, Nappy rash, Non-sticky and soft texture	Nappy rash, Skin ulcers, Bedsores, Nipple cracks	Dermatitis, Nappy rash, Wounds, Burns, Unbreakable tube, Convenient one-touch cap	Dermatitis, Nappy rash, Wounds, Suitable for sensitive skin
Price per Pack size	30g - €7.41 (288 THB) IDX 100 100g - €14.20 (552 THB) IDX192	50g – €6.18 (239 THB) IDX 83	30g – €3.09 (120 THB) IDX 42	50g – €4.95 (191 THB) IDX 67	30g – €6.18 (240 THB) IDX 83
M60 MAT Q1'25	#1 brand: Value Sales €17.6M M/S 31.54%	Value €8.9M M/S 16.06%	Value €0.5M	Value €0.4M	Value €0.1M

Activated Superiority Claims vs. Competitors



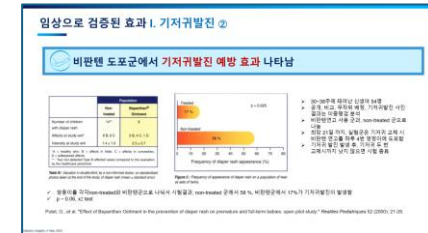
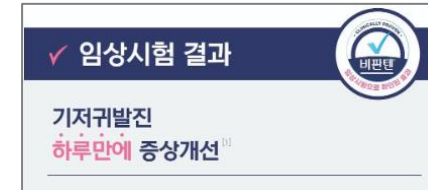
To shift the viewpoint from Negative/ skeptical to Positive, offered scientific backgrounds of product features to HCP influencers and generated HCP-endorsed WOM.

1. **Vs. Local competitor with Dexpanthenol 5%**
 “only 5% of the contents is the same, the other 95% of the formulation is different”
 Bepanthen is specially designed “Water in Oil formula” offering breathable skin barrier to protect up to 10hrs
 → Effectively protects the skin from repetitive irritation while skin gets healing from inside

2. **Vs. Local competitor**
 Tube maintains product hygiene and stability of preservative-free formula by preventing the entry of air and dust

3. Clinically proven to treat nappy rash **within 1 day**

4. Clinically proven to **prevent** the nappy rash



DTC Communications – Media & WoM



- Leverage 6s video advertisement to remind Bepanthen for its core usage, nappy rash.
- Showcase expended usage on Baby via peer-group influencer postings.

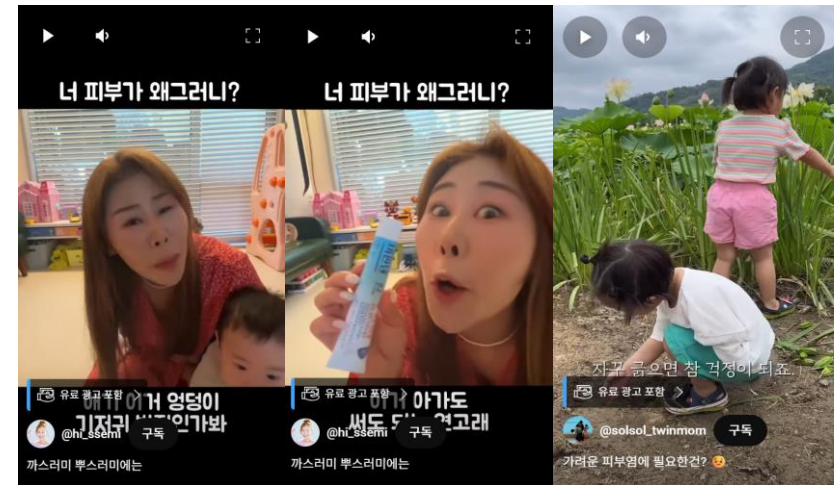
DTC Advertisement (Paid Media)

- ✓ **Increase brand recall for existing users (Moms with baby)**
→ ex. Interests targeting on “Baby products-nappy, crib, car seat)
- ✓ **Education for new consumer (Pre-mom)**
→ ex. Contents targeting on “Delivering baby”



Peer-group Influencers

- ✓ **Showcase Moms' usage moments in everyday life for various symptoms beyond nappy care – drool rash, nail scratch, etc**
→ “**Content that Addressable Audiences can resonate with**”



Early involvement of expecting Pre-Moms



Objective: Ensure pregnant women to become aware of Bepanthen's nappy rash offering for their babies

Activation: leveraging synergy with Elevit to reach expecting Pre-Moms: co-shipping Bepanthen leaflet from e-Com mall and displaying material in key OB-GYN clinics (Key Message: "This hospital is using Bepanthen, the solution from global pharmaceutical company Bayer with 160 years of heritage")

Brand Leaflet delivered with Elevit purchases

OB-GYN Office Display



RESTRICTED

Activating newborn parents at post-natal courses



Background: Korea has a culture to stay at postnatal center for 2 weeks after giving birth. Postnatal center offers baby care, basic baby care training courses and support the recovery of moms just delivered birth

Objective: Educate newborn moms on nappy changes and baby skin care while introducing Bepanthen during a baby care training



Building credibility through Science



Building brand credibility with clinical data demonstrating baby skin expertise
Activation through own brand website, e-commerce



기저귀 발진엔 비판텐!

기저귀 발진이란?

기저귀 차는 부위에 생기는 피부의 염증 반응
기저귀와 피부 사이 마찰이나, 대소변 장기간
접촉으로 인해 흔히 발생하는 신생아 피부질환^{1,2}

피부의 연약함

신생아의 피부는 얇고 힘이 적어 세포간의
접착력이 약해 외부 자극에 쉽게 손상될 수 있음?

증상^{1,2}

홍반, 위음부, 영양이 등에 나타나며 증상의 정도에
따라 넓어짐
인설, 아반, 진물 등 기저귀발진이 척질이 치료되지
않을 경우 심습성 또는 궤양성 병변으로 확대

주의사항

신생아의 피부는 피부장벽이 덜 발달되어 있어
외부 자극에 취약하고 잘 잡히는 부위가 쉽게 짓물러,
정밀하고 건조하게 유지하는 것이 중요!

기저귀발진엔 비판텐!

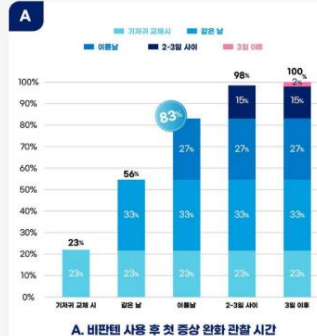


임상시험 결과

기저귀발진
하루만에 증상개선!

A,B Study Design

- 0-24개월 아이 1명 이상을 돌보는 500명 대상
- 6개월 이전부터 자극성 기저귀 피부염(DD) 치료에 비판텐 사용



- ✓ (A) 83%의 참여자에서 비판텐 사용 후 이튿날 첫 증상완화 징후 보고
- ✓ (B) 78%의 참여자에서 비판텐 사용 후 2일 이후 기저귀발진을 포함한 자극성 기저귀 피부염이 사라지거나 해결됨
- ✓ 79%의 참여자가 비판텐이 눈에 띄게 기저귀발진을 치료한다고 응답



References
1. Pethica Evans, et al. "Evaluation of a 5% dequalinium containing ointment for the treatment of infant nappy dermatitis through the lens of the caregiver - a real world data observational study." Health Science Reports 5.1 (2022): 41833.
2. 유수연. 신생아 피부질환. Korean J Pediatr. 2006; 49: 1-5.

기저귀 발진의 보조치료제로 비판텐을 사용할 수 있습니다.
홍농과-상진, 화살, 땀진, 습진, 수포, 물집, 심한 발진, 아반, 진물, 인설, 아반, 진물 등 기저귀발진이 척질이 치료되지 않을 경우 심습성 또는 궤양성 병변으로 확대

일반적용
광고상: 2023-1692-000102. 본사 자판기. 사용문의: 02-452-0000. 고객센터: 07335 서울특별시 영등포구 여의대로 108 베크론. 23층 (의크린타워 2)
Tel: 02-452-0000 http://www.bayer.co.kr

RESTRICTED

Extended Usage in Baby Skin beyond nappy care



To be part of more moments of use, showcase new relevant usage moments to moms with babies in everyday life for various cases – drool rash, nail scratch, etc.

Drool Rash

Before After

네이버 블로그 - NAVER
아기 침독 얼굴 효과 비교! 비판텐vs아...

Naver Blog
아기 침독 원인과 관리법 (+비판텐연고...)

건강을
아기 침독엔에 주문했어요- 비싸...

망가이드
아이 침독 이렇게 관리하세요 (+비판텐 연...

Naver Blog
비판텐 연고 효과 약국 가...

침독!
관리법과 관리 제품은?

Naver Blog
아기 침독 원인과 관리...

Threads
비판텐 쓰다가 판테놀 써 보고 이제 비판...

Instagram
[KID|DIY|REI|REI] 호주...

폴선드
보소미 연고20g 탐미...

미미톡 커뮤니티
멍뭉인지 침독인지.....

주인장이 먹는 거 좋아함 - 티스토리
지독했던 침독, 준비해서 극복! 그리고 침독

TikTok
비판텐 아이크림 안...

[VLOG] 이제 말귀 알아듣는 태아와 말 안듣는 태경이의 평범한 주말, 우리 가족 피부에 비판텐!



Nail Scratch

네이버 블로그 - NAVER
아기 얼굴 상처 손톱상처 ...

네이버 블로그 - NAVER
아기 상처연고 얼굴 손톱 상처연고...

네이버 블로그 - NAVER
신생아 손톱 활활 상처 관리 ...

Naver Blog
아기 얼굴 상처 손톱상처 ...

미미톡 커뮤니티
아기 손톱 긁힘 상처ㅠㅠ | ...

네이버 블로그 - NAVER
아기 손톱, 발톱 깎기/신생아 얼굴 ...

아하
아이 손톱 자르는 중 살을 ...

min97m85 - 티스토리
비판텐연고: 아기거머 발진, 아기...

Threads
엄마 너무 놀랐겠다 ...

네이버 블로그 - NAVER
아기상처연고 얼굴 손톱 상...

[VLOG] 이제 말귀 알아듣는 태아와 말 안듣는 태경이의 평범한 주말, 우리 가족 피부에 비판텐!



RESTRICTED



**Thank
you!**