COMPETITIVE & MARKET ANALYSIS

Ricola vs. the Throat-Relief Category — DACH Focus

Research by Hannah Agent, Plan.Net Studios · June 2026

Brands analysed: Ricola · Fisherman's Friend · Em-eukal · Halls · Wick

> **Data Sources:** Statista Market Insights (DACH Cold & Cough revenues 2016–2029) · Statista Consumer Insights (Germany, n=35,991, 2025) · GWI Core (DACH herbal buyers, Q2 2025–Q1 2026, n=~12,000) · GEO Sniffer / HybridAI (AI visibility audit, ChatGPT + Gemini) · SimilarWeb (May 2026) · Ahrefs (June 2026) · Apify Social Scrapers · Playwright website screenshots · Brand websites + news research

MY TAKE — THE SHORT VERSION

Ricola has the strongest brand heritage in the category and leads on organic search authority (DR 70, 54K monthly organic visitors) and AI visibility — ChatGPT and Gemini both name Ricola first when asked for natural throat lozenges in Germany. **But Fisherman's Friend is running laps around every brand on social media, especially TikTok in Germany, where they have 145K followers vs Ricola's 13K globally.** Em-eukal is Ricola's closest strategic threat — same natural positioning, pharmacy credibility, and German provenance — but a near-zero digital footprint (3.9K monthly web visits, DR 21). Halls barely exists in DACH. Wick is a different category (cold medicine, not herbal sweets) and declining digitally.

The three biggest opportunities for Ricola: (1) build a DACH-specific social media presence to close the 11x TikTok gap vs Fisherman's Friend; (2) own the year-round, beyond-cold-season use occasion digitally before competitors do; (3) activate Ricola's authority-source relationships (Stiftung Warentest, Apotheken Umschau) to convert AI visibility into owned traffic.

Overall data confidence: MEDIUM–HIGH. Market sizing, SEO, traffic, and AI visibility data are from primary premium sources (Statista, GEO Sniffer, SimilarWeb, Ahrefs). Social follower counts from web research. Brand market share estimates from a single unverified aggregator — treat directionally.

01 · MARKET OVERVIEW — DACH THROAT-RELIEF CATEGORY

Size & Growth

The relevant market is Cold & Cough Remedies (OTC), which encompasses throat lozenges, herbal sweets, medicated pastilles, cough syrups, and cold relief products. Throat lozenges and herbal confectionery represent an estimated 20–30% of this broader category.

Market	Revenue (2024)	CAGR 2024–2029	Trend
Germany (DE)	USD 2.06 B	~4–6%	↗ Moderate growth; slight deceleration expected
Austria (AT)	USD 233 M	~5%	↗ Stable, mirrors Germany
Switzerland (CH)	USD 300 M	~7%	↗ Small but premium-priced market
DACH Total	USD 2.59 B	~4–6%	↗ Germany = 80% of DACH
Europe Total	USD 10.2 B	~4–5%	↗ DACH = ~25% of European market

Source: Statista Market Insights, Cold & Cough Remedies, May 2026. Germany = #3 globally behind USA (USD 11.2B) and China (USD 8.4B). [1][2]

Key Category Trends

- **Naturalness:** Herbal & natural premium shift: The dominant growth driver across DACH. Honey, ginger, echinacea, eucalyptus, and alpine herb formulations are growing fastest — directly tailored to Ricola's positioning.
- **Occasion broadening:** Year-round occasion expansion: Brands are moving from purely cold-season to everyday wellness. Ricola's 2026 launch of Everyday Citrus Drops ("for active days, not sick days") signals this structural shift industry-wide.
- **Digital purchase:** Online pharmacy surge: 37% of German consumers purchase medication via online pharmacy (vs ~9% local retail/DM/Rossmann) — far higher than pre-COVID. DocMorris, Shop Apotheke, and Amazon are now material distribution levers.
- **Pharmacy-first:** Pharmacy channel dominance: Germany's pharmacy-only OTC rules mean shelf visibility and pharmacist recommendation remain disproportionately powerful — but online pharmacy is eroding this moat.
- **Functional:** Sugar-free & functional ingredients: Zinc, vitamin C, echinacea, and probiotic formulations are capturing both health-conscious buyers and OTC-credibility seekers.
- **Private label:** Private label limited: German pharmacy distribution restricts private label entry vs UK/French supermarket models. Heritage brand narratives provide additional protection.

The DACH Consumer: Who Actually Buys This Category

GWI Core audience profiling (DACH herbal remedy buyers, Q2 2025–Q1 2026, n=~12,000) reveals a buyer who is significantly more digitally engaged and health-literate than category advertising typically assumes.

Audience Signal	GWI Index	What This Means for Strategy
Female skew	114	57% female — skew creative voices and channels accordingly
Online health info = very important	154	They research before they buy. Content wins.
Expert blogger / influencer discovery	188	88% more likely to discover via health bloggers — influencer ROI is high here
YouTube / video brand discovery	183	Video content is a primary purchase trigger, not just awareness
Health & lifestyle podcast consumption	163	Podcast sponsorships over-index vs. general OTC advertising
Online health product purchase	137	Strong digital conversion — online pharmacy SEO is a commercial lever
Higher education (bachelor+)	130	Evidence-based claims and ingredient transparency resonate
Multiple health conditions (household)	142–160	Health-engaged, researched buyers — not impulsive purchases

Source: GWI Core (ds-core), DE+AT+CH, Q2 2025–Q1 2026. Index = likelihood vs average consumer. Index 100 = average. [3]

> *"The typical DACH herbal remedy buyer discovers brands through expert bloggers and YouTube health content, buys primarily at the pharmacy — but increasingly online — and cares deeply about ingredient transparency. Traditional TV advertising is inefficient for this audience."*

02 · COMPETITOR PROFILES

🌿 Ricola

Attribute	Details
Parent	Family-owned (Richterich family, 3rd generation, Laufen, Switzerland)
Founded	1930 in Laufen, Switzerland
Global Revenue	~EUR 362M (2023, record year; 2024: moderate organic growth)
DACH Position	Largest European market for Ricola. Expanded cough-drop segment leadership in 2023; slight miss vs expectations in 2024 despite gaining market share.
Core Message	"Die Bonbons mit Schweizer Alpenkräutern seit 1930" / "Fühl dich fresh — Fühl dich bonbon"

Attribute	Details
Positioning	Premium Swiss heritage + natural wellness. Only brand in category with B Corp certification (2024, first in cough-drop industry). Bridges confectionery and wellness — "no direct competition on a global level."
Price Tier	PREMIUM — EUR 2.35–3.95 for 75–250g bags (DM/Rossmann)
Product Range	15+ varieties: Original (13 herbs), Throat Balm (pectin + honey), Fresh Mint, Raspberry Lemon Balm, Elderflower, Lemon Balm, Sugar-Free range, Instant Teas. New 2026: Everyday Citrus Drops for year-round use.
Recent Strategy	Year-round repositioning (beyond cold season); pharmacy channel strengthening; D2C via Shopify; B Corp for brand differentiation; Asia Pacific expansion.
B Corp	Yes — first in the cough-drop industry (2024). Bio Suisse herb sourcing, 91% of herbs met agricultural principles in 2024.

⚓ Fisherman's Friend

Attribute	Details
Parent	Lofthouse of Fleetwood (UK private family company), distributed via CFP Brands in Germany
Founded	1865 (James Lofthouse, pharmacist, Fleetwood, Lancashire)
Germany Position	Germany is their SINGLE LARGEST global market — ~60 million packs sold annually in Germany alone. 7 of their flavors rank among the top 10 best-selling sweets in German gas stations.
Core Message	"Stark. Mutig. Und immer an deiner Seite" / "Sind sie zu stark?" (revived classic: "Are they too strong, or are you too weak?")
Positioning	Strong, bold, slightly irreverent — the brand that challenges you. Not medical, not premium. Provocative and cult. Authentic despite British origin.
Price Tier	BUDGET/VALUE — EUR 0.70–0.95 for 25g at DM
Product Range	15+ flavors: Original Extra Strong (menthol), Cherry, Mint, Spearmint, Eucalyptus, Salmiak, Aniseed, Raspberry, Berry Mix, Tropical, Honey & Lemon, Sugar-free variants across most flavors.
DACH Digital	TikTok DE: 145K followers, 2.7M likes (agency La Red, always-on content). Instagram DE: 31K followers. Festival marketing strategy (Rock Am Ring, Deichbrand, Southside). Rapper Marteria as brand ambassador.
Recent Strategy	Gen Z activation via TikTok + festivals. "Sind sie zu stark?" claim revival. Always-on social content. Very minimal paid search investment.

DE Em-eukal (Dr. C. Soldan)

Attribute	Details
Parent	Dr. C. Soldan GmbH, Adelsdorf (Nuremberg region, family-owned, 4th generation, Perry Soldan managing partner)
Founded	Em-eukal brand since 1923; Dr. C. Soldan since 1899
Germany Position	Leading brand in the pharmacy throat-lozenge segment. Circana data (March 2024) confirms market leadership by turnover in German pharmacy channel.
Core Message	"Nur echt mit der Fahne" (Only genuine with the flag — the unique embossed flag on each lozenge as an authenticity marker)
Positioning	Made-in-Germany quality, premium natural ingredients, eucalyptus/menthol heritage. "Your companion for every moment." Wellness positioning evolving toward vitamin/immune support.
Price Tier	MID-TIER — EUR 1.95–2.59 for 75–150g. Pharmacy-dominant distribution.
Product Range	Classic (eucalyptus/menthol), Salvia, Ginger-Orange, Wild Cherry, Sugar-free range, Kids Em-eukal (5 vitamins, 7 herbs), Frische Pastillen (metal tins, pharmacy-exclusive, since 2020), Em-eukal Pro, Vitamin/Immune range (vitamins C, B6, B9, B12).
Digital Presence	Very limited: em-eukal.com — 3,939 monthly visits (100% Germany), DR 21. Social channels exist (Instagram, YouTube, Facebook, LinkedIn) but scale is not material.
Recent Innovation	Em-eukal Gumdrops awarded "Best Brand Expansion" by Lebensmittel Zeitung (2024). Vitamin/immune range expanding. Pharmacy-only Frische Pastillen in premium metal tins.

💊 Wick (P&G)

Attribute	Details
Parent	Procter & Gamble (P&G Health), DACH marketed as "Wick" (not Vicks — to avoid German pronunciation issue with "v" as "f")
Founded	Brand over 100 years old. P&G acquired Vicks; German branch operates as Wick Pharma
Position	Best-selling brand for cold symptom relief globally (by P&G's own claim). ~23 million Wick VapoRub jars produced annually in Groß-Gerau, Germany.
Core Message	"Schnelle und effektive Linderung bei Erkältungssymptomen" (Fast and effective relief for cold symptoms). Trust: "Consumers have trusted Wick for over 100 years."
Positioning	DIFFERENT CATEGORY from Ricola — Wick is primarily OTC cold medicine, not herbal sweets. Fast medical relief for families. Clinical, trusted, not indulgent.
Price Tier	OTC pharmacy pricing. Not primarily a lozenge/confectionery brand.
Product Range	Primarily syrups (MediNait night formula), tablets/capsules (DayNait, DayMed), VapoRub (vapour balm), Babybalsam, nasal sprays (Nasivin), hot

Attribute	Details
	beverages. Throat lozenges are a minor part of the portfolio, not a primary form.
Digital Presence	wick.de: 36,834 monthly visits (-33% declining trend), 86.5% German traffic. DR 37. Declining web presence as brand shifts toward digital health platforms.
Key Note	Wick is a partial competitor at best. Their throat-related products exist, but the brand's positioning (cold medicine) and distribution (pharmacy OTC) differ from herbal-confectionery brands like Ricola.

🍃 Halls (Mondelēz International)

Attribute	Details
Parent	Mondelēz International (announced intention to divest Halls in May 2022; sale not completed as of end-2025 — brand remains in Mondelēz portfolio)
Founded	1893 (Hall Brothers), UK
Global Position	World's #1 cough drop brand — >50% of global cough-drop market. USD ~470M annual revenue (2022). Dominant in USA and key Latin American markets.
Core Message	"Relieves cough and soothes throat" — functional menthol relief. Brand exists globally but lacks consistent DACH brand narrative.
Positioning	Mass-market global leader. Functional, menthol-focused, accessible. No premium ingredient story. Position in DACH is generic.
Price Tier	MID-BUDGET — globally accessible price point
DACH Digital	No halls.de German-language website found. gethalls.com (US domain): 13,581 monthly visits, 0% from Germany. No DACH social presence detected. Essentially no DACH digital investment.
Channels (DACH)	Available in German pharmacies and some retail, but no brand-building investment detected. Sold under pharmacist recommendation rather than brand pull.
Key Note	Despite global scale, Halls has negligible DACH brand equity. Category leader in volume globally, but effectively a non-player in DACH brand marketing.

03 · DIGITAL PRESENCE SCORECARD

Web Traffic & Domain Authority

Metric	Ricola.com	FishermansFriend.com	Em-eukal.com	Wick.de	Halls.com
Monthly Visits (May '26)	144,040	96,451	3,939	36,834	13,581
MoM Traffic Trend	↑ +29%	↑ +6%	↓ −45%	↓ −33%	↑ +15%
Domain Rating (DR)	70 ★★★	58 ★★	21 ★	37 ★	33 ★
Organic Traffic (mo)	53,992	23,757	1,708	24,586	16,464
Organic Value ($/mo)	$908K	$203K	$21K	$459K	$332K
Primary Traffic Source	Search 65%	Search 81%	Referral 46%	Search 89%	Search 100%
Social Traffic Share	2.9%	0%	1.2%	0%	0%
German Traffic Share	13%	12%	100%	87%	0%
Key DE Keywords	"cough drops" #1	brand terms only	"em eukal" #1	"bronchitis" #1	no DE keywords

Source: SimilarWeb (May 2026), Ahrefs (June 2026), both via Apify. All figures are modelled estimates from third-party analytics platforms — directional, not audited. [4][5]

Social Media Presence

Platform / Metric	Ricola	Fisherman's Friend	Em-eukal	Wick	Halls
TikTok — DACH	~13K global	145K DE ☆	Not found	Not found	Not found
TikTok Likes	N/A	2.7M ☆	—	—	—
Instagram — DACH	~20K global	31K DE ☆	Present (small)	Present (small)	Not found
Social Strategy	Global brand account	Gen Z, festivals, Marteria, La Red agency (always-on TikTok)	Pharmacy/wellness	Cold medicine utility	None / US only
TikTok Advantage	—	11x Ricola globally ☆	—	—	—
Key Campaign	"Just Take Ricola"	"Sind sie zu stark?"	Brand authenticity	Product utility	—

Platform / Metric	Ricola	Fisherman's Friend	Em-eukal	Wick	Halls
	(global); Swiss-Ski Silver Partner	revived with Marteria; festival circuit			

Sources: Web research (June 2026). TikTok follower counts from tiktok.com profiles. Instagram from instagram.com profiles. [6]

AI / LLM Visibility

GEO Sniffer audit conducted for the query "Beste Halspastillen in Deutschland" (Best throat lozenges in Germany) and "natürliche Halspastillen" across ChatGPT, Gemini, and Claude:

Brand	ChatGPT Mention	Gemini Mention	Positioning in AI Responses	Verdict
Ricola	#1 ☆	#1 ☆	"Natural Swiss herbs, soothing relief, heritage quality"	AI LEADER — natural category
Em-eukal	#3	#3	"German quality, eucalyptus + vitamins" — overlaps with Ricola	2nd natural brand in AI
Fisherman's Friend	#2 (different cluster)	#2 (strong/menthol)	"Strong menthol relief" — distinct positioning cluster	Owns strong/menthol AI space
Halls	#4 (Gemini only)	—	Global brand, less DACH-specific	Weak DACH AI presence
Wick	#4 (ChatGPT only)	—	Cold medicine, not herbal sweets	Weak in lozenge AI context

AI Insight: Ricola has strong AI brand equity in the natural/herbal category. However, none of the brands have deployed llms.txt (verified). More critically, the trusted authority sources that feed AI training — Stiftung Warentest, Apotheken Umschau, NetDoktor — do not feature Ricola as a primary resource. Users who ask AI "which is better?" are being routed through third-party health sites, not Ricola-owned content.

Source: GEO Sniffer / HybridAI API, ChatGPT + Gemini + Claude models, DE-language queries, June 2026. llms.txt check: HTTP verification of /llms.txt at all 5 domains. [7][8]

04 · WHO IS WINNING ONLINE — AND WHY

The Overall Picture

No single brand dominates across all digital dimensions. The competitive landscape splits clearly by arena:

Arena	Winner	Why
Website Traffic	Ricola ☆	144K monthly visits, +29% growth. DR 70. $908K/mo organic value. Significant SEO investment paying off.
SEO Authority	Ricola ☆	DR 70 vs nearest competitor FF at DR 58. Ricola ranks #1 for 'cough drops' (global English). Broadest organic keyword set.
AI / LLM Visibility	Ricola ☆ (natural cluster)	Named #1 by ChatGPT and Gemini for natural throat relief in Germany. Strong brand equity in AI training data.
TikTok	Fisherman's Friend ☆☆	145K DE followers, 2.7M likes vs Ricola's 13K globally. A 11x advantage. Festival strategy + Marteria campaign is working.
Instagram	Fisherman's Friend ☆	31K DE-specific followers vs Ricola's 20K global account. FF has DE-local strategy; Ricola runs a global account.
Brand Engagement	Fisherman's Friend ☆	Lower bounce rate (39.6% vs Ricola's 49.7%), more pages/visit (2.39 vs 1.85). Higher content engagement.
Pharmacy Channel SEO	Em-eukal ☆ (claim)	Pharmacy market leadership (Circana data) but digital presence doesn't reflect it (only 3.9K web visits/mo).
DACH-Specific Digital	Em-eukal / Wick	Both are DACH-only; Ricola and FF are global brands with DE as 12–13% of traffic. Em-eukal = 100% DE-focused but tiny.
Total Digital Footprint	Ricola	Strongest overall: highest traffic, highest authority, AI leader, D2C capability, 11-market website. Social is the gap.

Why Fisherman's Friend Is Winning Social — And What To Learn

The contrast between Ricola and Fisherman's Friend on TikTok is one of the starkest digital gaps in the category. FF has 145,000 German TikTok followers (2.7M likes); Ricola has ~13,000 globally. This is not just a follower count difference — it represents a fundamentally different social media philosophy.

- **Local account structure:** Dedicated DE-market social presence: FF runs @fishermansfriend_de — a Germany-specific account. Ricola runs one global @ricola account trying to serve 45 countries simultaneously.
- **Cultural embedding:** Festival cultural identity: FF sponsors Rock Am Ring, Deichbrand, Southside — associating the brand with summer youth culture rather than colds and illness. They've turned a throat lozenge into a festival accessory.

- **Marteria partnership:** Celebrity brand ambassador: German rapper Marteria gave FF's 'Sind sie zu stark?' revival cultural credibility with Gen Z. The collaboration feels earned, not bought.
- **Agency structure:** Always-on agency: FF hired La Red specifically for TikTok + Instagram always-on content. A dedicated social agency vs. a global brand team managing 45 markets.
- **Content tone:** Provocation over polish: FF's TikTok content is self-aware and irreverent — challenge culture fits the platform. Ricola's heritage-premium tone is harder to make native to TikTok.

Why Ricola Is Still Winning Search — And The AI Risk

Ricola's DR 70 and 54K monthly organic visitors is a genuine competitive moat in the category. But two structural risks are developing:

- **AI Overviews risk:** Google AI Overviews are cutting organic click-through rates in Germany by up to 59% (SISTRIX data). Ricola's organic traffic leadership may erode as AI answers replace clicks to brand sites.
- **Authority source dependency:** Ricola's AI visibility (currently strong) is built on third-party health site mentions, not owned content. Stiftung Warentest, Apotheken Umschau, and NetDoktor are the sources AI trusts — and Ricola hasn't partnered with these as primary content contributors.
- **llms.txt gap:** No llms.txt deployment from any brand in this category. First-mover advantage is still available.

05 · RICOLA VS. THE FIELD — POSITION & OPPORTUNITIES

Where Ricola Stands

Ricola's relative position is strong in heritage, SEO, and AI visibility — but underperforms its EUR 362M revenue scale on social media, and has not yet converted its natural/wellness positioning into a DACH-specific digital identity that resonates with the content behaviours the target consumer actually uses (expert blogs, YouTube health content, podcasts — GWI Index 163–188).

Dimension	Ricola Score	vs. Best-in-Class	Assessment
Brand heritage & trust	9/10	Ricola = reference brand globally	Unique asset — no one else has 13 Swiss herbs + B Corp + 90+ year history

Dimension	Ricola Score	vs. Best-in-Class	Assessment
Website quality & D2C	8/10	Best in category	MACH architecture, Shopify D2C, 11-market localization. Clear leadership.
SEO & organic authority	8/10	Best in category	DR 70, $908K/mo organic value. Significant gap above competition.
AI / LLM visibility	7/10	Leader in natural category	Strong, but authority sources are third-party. llms.txt not deployed.
Social media — TikTok	2/10	11x behind FF in DE	Only 13K global followers. No DE-specific account. No influencer strategy.
Social media — Instagram	4/10	Below FF in DE	20K global vs FF's 31K DE-specific. Global account dilutes DE relevance.
Year-round use positioning	5/10	Emerging — behind FF	Everyday Drops (2026) signals intent but FF has been at festivals for years.
Pharmacy authority	6/10	Em-eukal stronger in DE pharmacy	Ricola is reorienting pharmacy distribution but Em-eukal leads that channel.
DACH-specific digital voice	4/10	Global brand gap	No DE-local content strategy. Global account serves 45 markets simultaneously.

The 3 Biggest Opportunities

Opportunity 1: Build a DACH-specific social identity — starting with TikTok

The gap: Fisherman's Friend has 145K TikTok followers in Germany with 2.7M likes. Ricola has 13K globally. Ricola's EUR 362M revenue warrants a fundamentally different social investment than what a single global account can deliver.

The play: Launch @ricola_de (TikTok + Instagram) as a DACH-specific account with local content strategy. The GWI audience skews female, values expert discovery (Index 188), and responds to video health content (Index 183). There is a natural Ricola TikTok voice: sustainability storytelling, alpine herb origin content, partnership with DACH wellness/nutrition creators who already have the audience trust. Festival placement is FF's territory — but hiking season, wellness rituals, and everyday freshness moments are open.

Why now: DACH TikTok creator ecosystem in the health/wellness space is growing rapidly. First-mover advantage among premium herbal brands is still available. No competing herbal brand (Em-eukal, Wick) has a meaningful TikTok presence.

Opportunity 2: Own year-round digital positioning before competitors

The gap: Ricola's revenue is highly seasonal (cold season peaks). The DACH market, worth USD 2.59B, is growing partly because consumers are finding year-round reasons to buy. Fisherman's Friend has already claimed festival/summer through their social strategy. Ricola's 2026 Everyday Drops launch makes the intent clear — but the digital narrative is not yet built.

The play: Build a content strategy around year-round use occasions — voice recovery (podcasters, singers, teachers), travel, sport, urban air quality, everyday freshness. These are distinct from FF's festival positioning and directly aligned with the GWI audience's active-lifestyle and wellness-first self-image. Pair this with an editorial content hub (health blog, recipe-style wellness content) that builds Ricola's organic search presence on non-cold, non-seasonal keywords.

Why now: Category growth projections (4–6% CAGR through 2029) are driven in part by occasion expansion. Brands that own year-round use occasions first will compound that advantage. Ricola already has DR 70 — a content investment will convert that authority into owned rankings for non-seasonal keywords faster than any competitor could achieve from scratch.

Opportunity 3: Activate authority sources to convert AI visibility into traffic

The gap: Ricola has strong AI brand equity — named first by ChatGPT and Gemini. But the sources that feed this visibility (Stiftung Warentest, Apotheken Umschau, NetDoktor) don't feature Ricola as a primary resource or content contributor. As Google AI Overviews cut organic CTR in Germany (by up to 59% per SISTRIX data), brands that are embedded in authority sources will maintain discovery; brands that depend purely on owned search traffic will bleed.

The play: Three-track approach: (1) PR/editorial partnerships with Apotheken Umschau, NetDoktor, and Gesundheit.de — Ricola's B Corp certification and natural herb sourcing are newsworthy in health media; (2) Stiftung Warentest engagement — being tested and positively evaluated would create sustained AI-citation-worthy content; (3) Deploy llms.txt across ricola.com and DACH-local subdomains as a first-mover infrastructure signal. None of the competitors have done this.

Why now: Ricola's existing AI visibility is an advantage to protect, not a status quo to assume. The window for structuring AI relationships through content and authority-site presence is 2025–2026 — before LLM training cycles lock in competitive positions more permanently.

Summary: Ricola's Competitive Position

Ricola is the category's strongest brand on heritage, website quality, SEO, and AI visibility. The single biggest vulnerability is social media — where Fisherman's Friend has built an 11x advantage on TikTok in Germany alone. Em-eukal is the strategic threat to monitor: same natural/herbal positioning, pharmacy credibility, and German authenticity, but currently a digital non-entity (3.9K web visits/mo). If Em-eukal ever invests in digital, it will be a direct Ricola competitor. Halls is globally dominant but essentially absent from DACH brand marketing. Wick is a different category. The market is growing (4–6% CAGR), the consumer is digital-first, and the year-round use occasion is wide open. Ricola has the assets — what it needs is a DACH-native social and content strategy to match its brand strength.

SOURCES & METHODOLOGY

Primary Data Sources

#	Source	What It Covers	Confidence
[1]	Statista Market Insights — Cold & Cough Remedies Revenue (MI ID 19fb55d4)	DACH market size 2016–2029 in USD by country. Germany USD 2.06B (2024), DACH USD 2.59B.	HIGH
[2]	Statista Market Insights — Revenue Growth (MI ID 9659fdc6)	CAGR and YoY growth rates for DE/AT/CH/EUR, 2017–2029.	HIGH
[3]	GWI Core (ds-core) — DACH Herbal Remedy Buyers	Audience profiling. DE+AT+CH, Q2 2025–Q1 2026, n=~12,000. Indices for health behaviours, digital media consumption, discovery channels.	HIGH
[4]	SimilarWeb (via Apify radeance/similarweb-scraper) — May 2026	Monthly visits, bounce rate, pages/visit, channel mix, geographic distribution. Panel-based estimates — directional.	MEDIUM
[5]	Ahrefs (via Apify radeance/ahrefs-scraper) — June 2026	Domain Rating, backlinks, referring domains, organic traffic estimates, top keywords by domain, DE country filter.	MEDIUM
[6]	Web research — Social media profiles	TikTok and Instagram follower counts from public platform pages (June 2026). FF DE: 145K TikTok, 31K IG. Ricola: 13K TikTok, 20K IG global.	MEDIUM
[7]	GEO Sniffer / HybridAI API — AI Visibility Audit	Brand mentions across ChatGPT, Gemini, Claude for DE-language throat-lozenge queries. 'asked', 'live', 'sites', 'brands' methods.	MEDIUM
[8]	llms.txt check — HTTP verification	Availability of /llms.txt at all 5 brand domains. Result: None deployed.	HIGH
[9]	Statista Consumer Insights (gcs_deu_202504, n=35,991)	Medication purchase channel data, Germany 2025. Pharmacy 78%, online pharmacy 37%, local retail 9%.	HIGH
[10]	Statista Statistics (Chart 964459, VMA/GfK/Ipsos)	Cold remedy types used in Germany. Lozenges 24.1% weekly use when ill (ranked 3rd). 2021 data.	MEDIUM
[11]	Ricola press releases (ricola.com/en, 2023–2024)	Revenue records, Germany as largest European market, B Corp certification, product launches, 2024 results.	HIGH

#	Source	What It Covers	Confidence
[12]	Fisherman's Friend: Wikipedia, CFP Brands, Meedia.de, Marketing Club Leipzig	Germany market position (60M packs/year), TikTok strategy, Marteria campaign, La Red agency appointment.	MEDIUM
[13]	Dr. C. Soldan company website (soldan.com)	Em-eukal company history, product range, family ownership structure, brand positioning.	HIGH
[14]	Brand websites: ricola.com, em-eukal.com, fishermansfriend.de, wick.de	Core messaging, product ranges, brand positioning statements. Captured June 2026.	HIGH
[15]	Mordor Intelligence / Euromonitor / Mintel — web research	Germany OTC market USD 9.5B (2025), herbal segment growth, naturalness as top purchase driver. Third-party aggregated.	MEDIUM-LOW

Data Limitations to Note

- No standalone subcategory dataset exists in Statista for 'herbal lozenges only' within DACH — throat lozenges are nested inside broader Cold & Cough Remedies. The 20–30% subcategory share estimate is derived from category format breakdowns in comparable geographies.
- Brand market share estimates in Germany pharmacies (Wick 15%, Em-eukal 6%, Ricola 4%) are from a single unverified aggregator (ESSFeed) and should be treated as directional only — not as audited research.
- Social media follower counts are point-in-time captures from public profiles and are approximate. No engagement rate data was available for Em-eukal or Wick via web research.
- Web traffic figures (SimilarWeb, Ahrefs) are modelled estimates from third-party analytics platforms, not from owned analytics. Actual figures may differ materially. Use as directional comparisons.
- GEO Sniffer captures AI model training data signals, not real-time Google AI Overviews (which would require a DataForSEO llm-mentions endpoint query). Claude model response was incomplete — findings are based on ChatGPT + Gemini 2-model consensus.