



hmr

HEALTH MARKET RESEARCH  
Ireland

# Prescription Market Trends

Pharmacy channel

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December 2019

# MAIN MARKET TRENDS

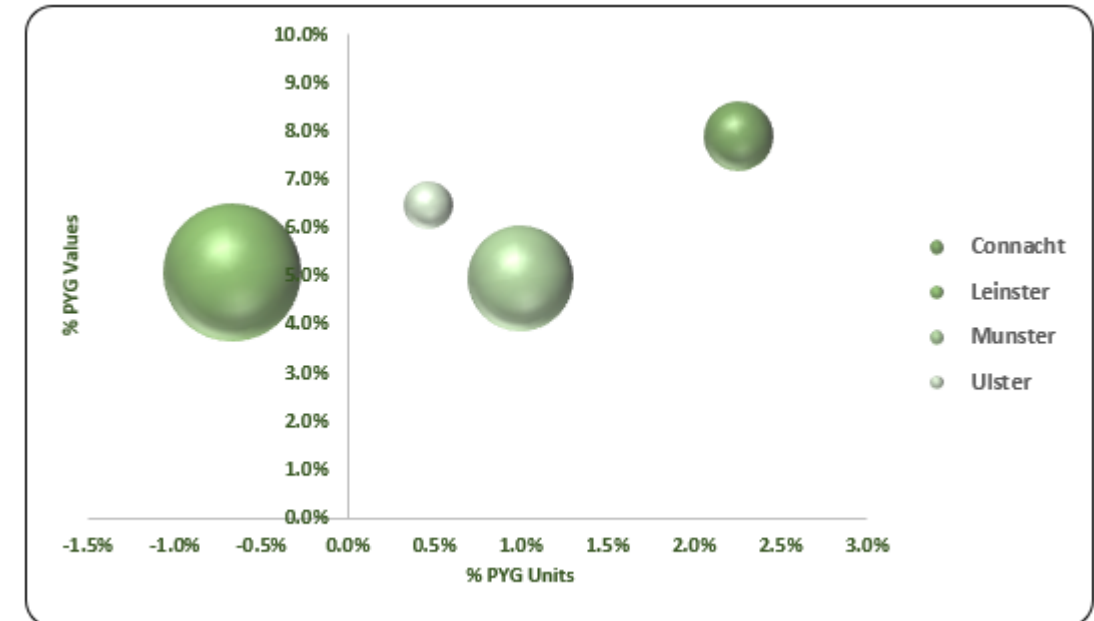
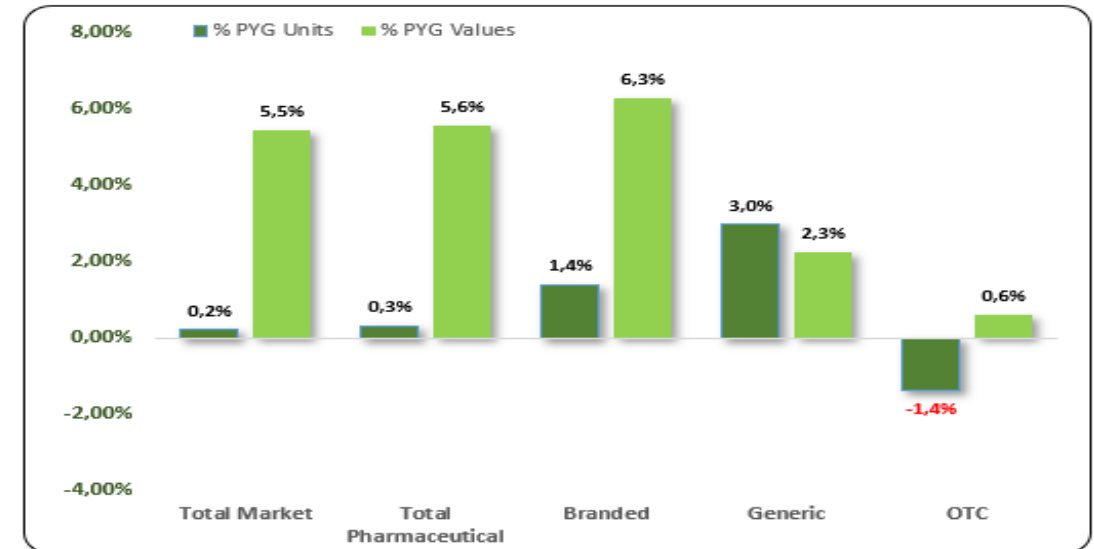
FULL YEAR 2019 VS 2018

The Irish Prescription market has grown in 2019 by 5.5% in Value and grown in Units by 0.2%.

The main driver of the value growth are the innovative brands at 6.3%. Generic sees an increase of 2.3%, while the OTC sees a slight increase in value of 0.6%.

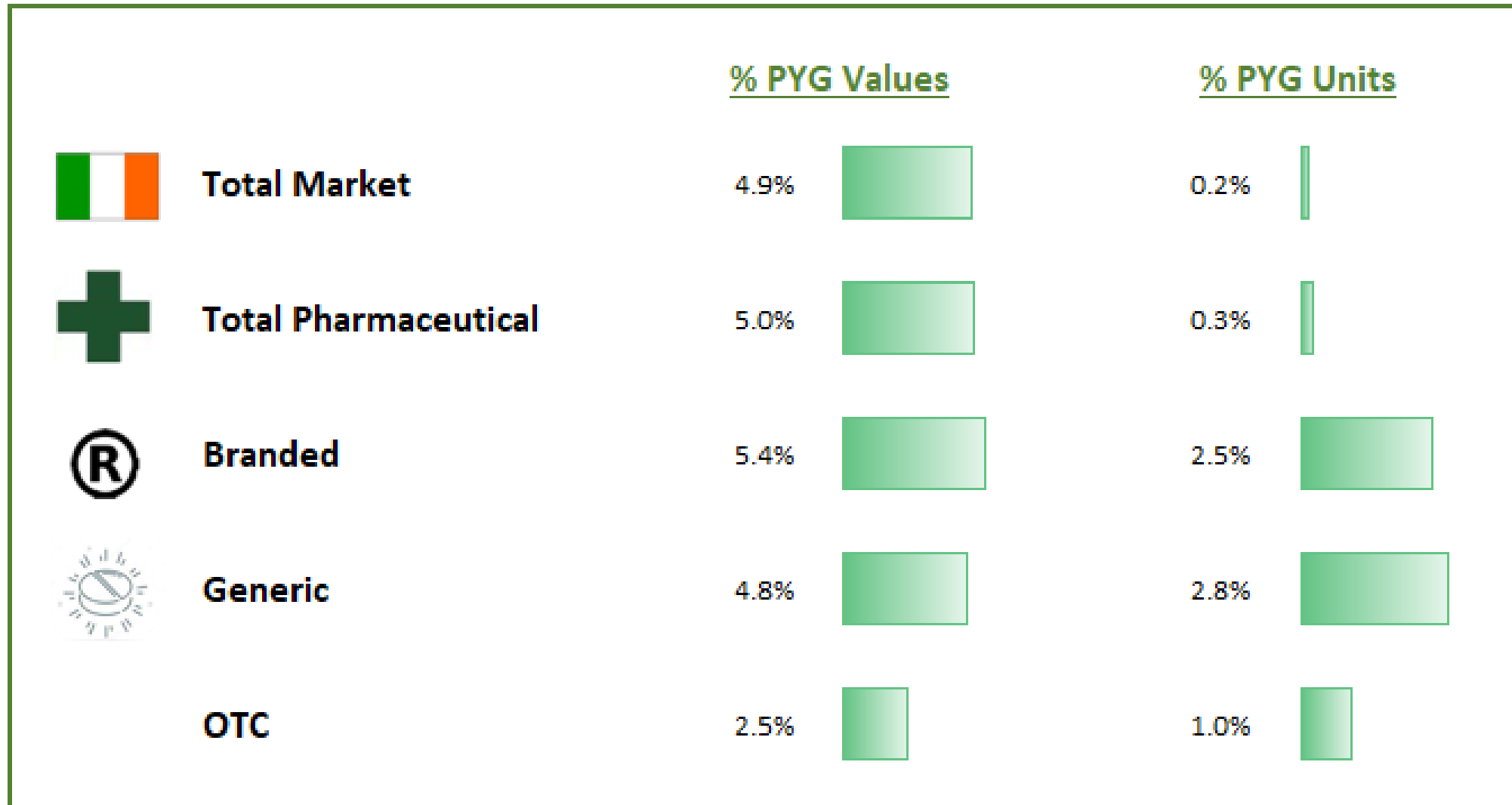
Although an increase in units in generic medicines dispensed of 3.0% we can only see a slight increase in branded of 1.4%, but a reduction in OTC of -1.4%.

Connacht has the highest in both PYG for Value, and Units for December.



# MARKET SEGMENT TRENDS

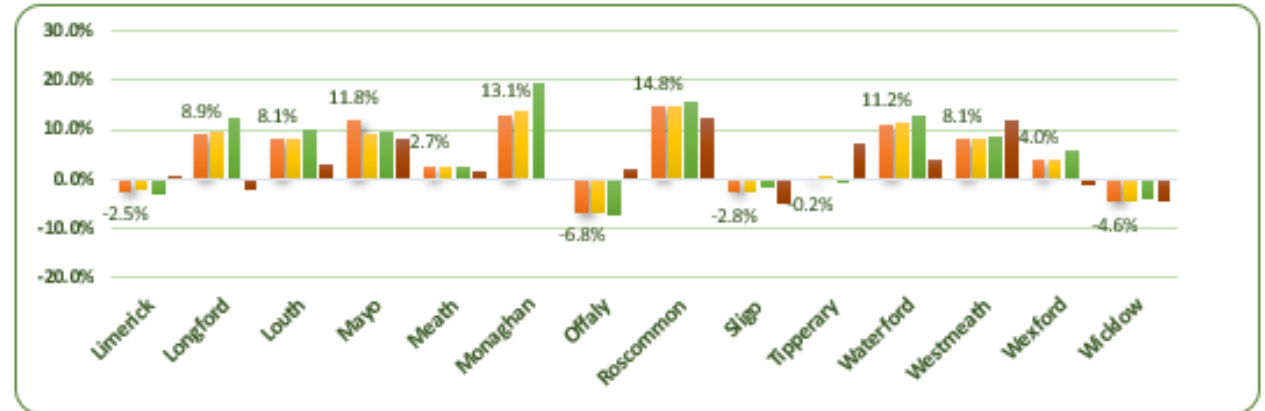
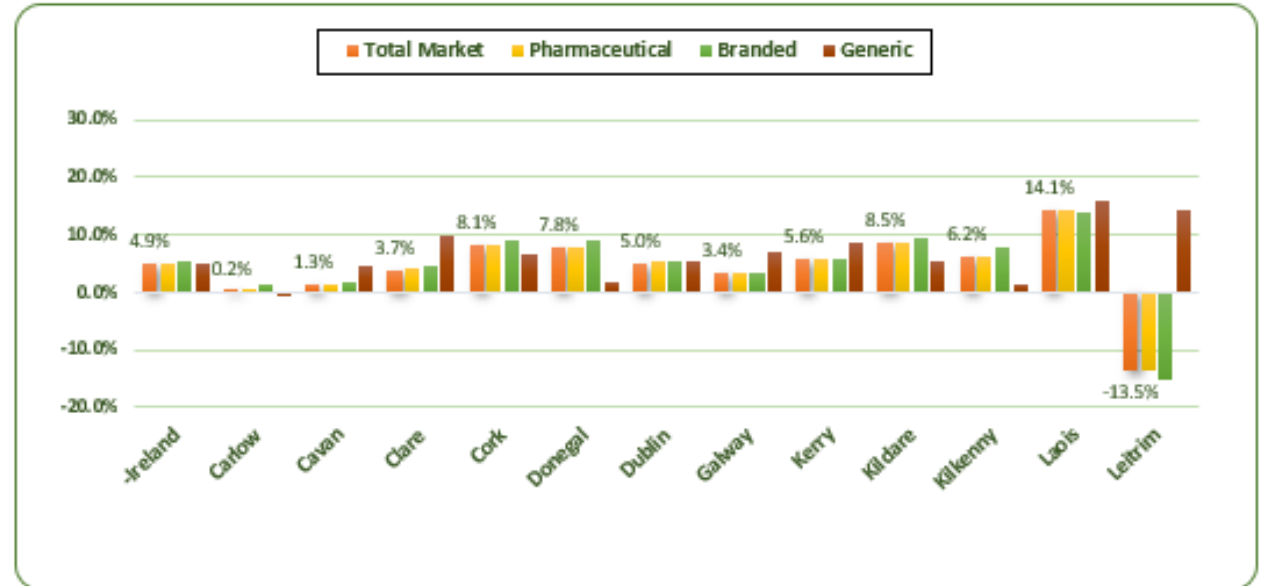
DECEMBER 2019 VS DECEMBER 2018



# COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

DECEMBER 2019 VALUE VS DECEMBER 2018 VALUE

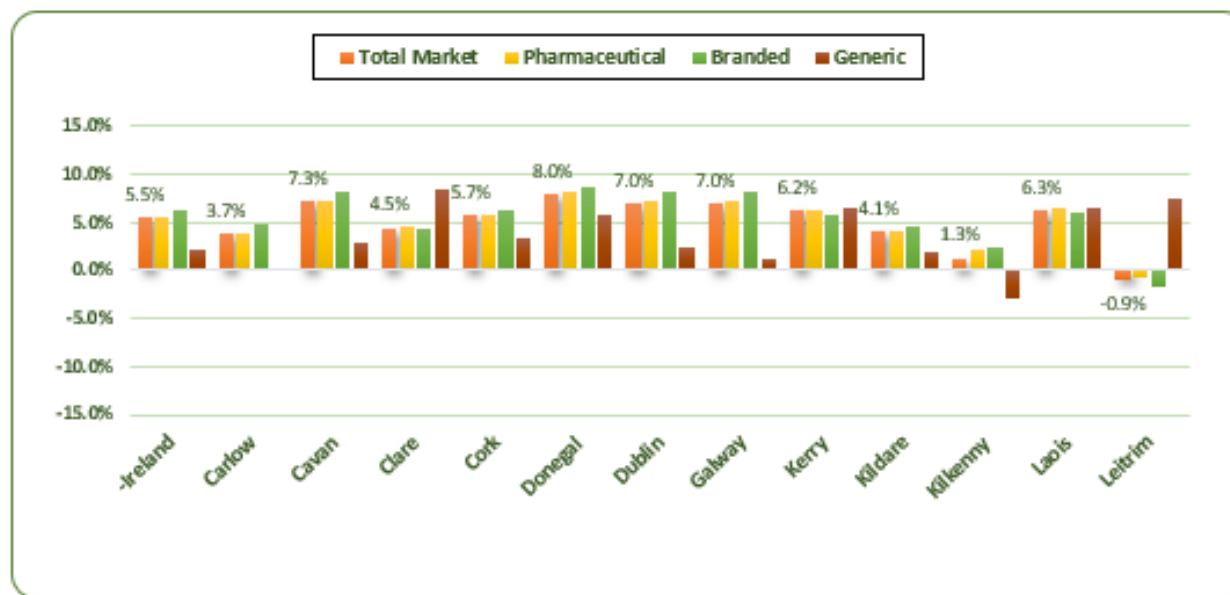
County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	4.9%	5.0%	5.4%	4.8%
Carlow	0.2%	0.5%	1.3%	-0.8%
Cavan	1.3%	1.1%	1.7%	4.7%
Clare	3.7%	4.1%	4.5%	9.9%
Cork	8.1%	8.1%	9.0%	6.6%
Donegal	7.8%	7.9%	8.9%	1.5%
Dublin	5.0%	5.3%	5.5%	5.5%
Galway	3.4%	3.4%	3.4%	7.0%
Kerry	5.6%	5.9%	5.8%	8.5%
Kildare	8.5%	8.5%	9.3%	5.4%
Kilkenny	6.2%	6.3%	7.6%	1.3%
Laois	14.1%	14.4%	13.8%	15.7%
Leitrim	-13.5%	-13.5%	-15.2%	14.3%
Limerick	-2.5%	-2.4%	-2.9%	0.8%
Longford	8.9%	9.5%	12.4%	-2.3%
Louth	8.1%	8.2%	10.2%	3.1%
Mayo	11.8%	9.2%	9.8%	8.0%
Meath	2.7%	2.6%	2.6%	1.7%
Monaghan	13.1%	14.1%	19.4%	-0.4%
Offaly	-6.8%	-6.8%	-7.3%	2.2%
Roscommon	14.8%	14.8%	15.9%	12.5%
Sligo	-2.8%	-2.6%	-1.7%	-5.1%
Tipperary	-0.2%	0.2%	-0.6%	7.2%
Waterford	11.2%	11.7%	12.7%	3.7%
Westmeath	8.1%	8.2%	8.6%	12.1%
Wexford	4.0%	4.2%	5.8%	-1.1%
Wicklow	-4.6%	-4.5%	-3.9%	-4.5%



# COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

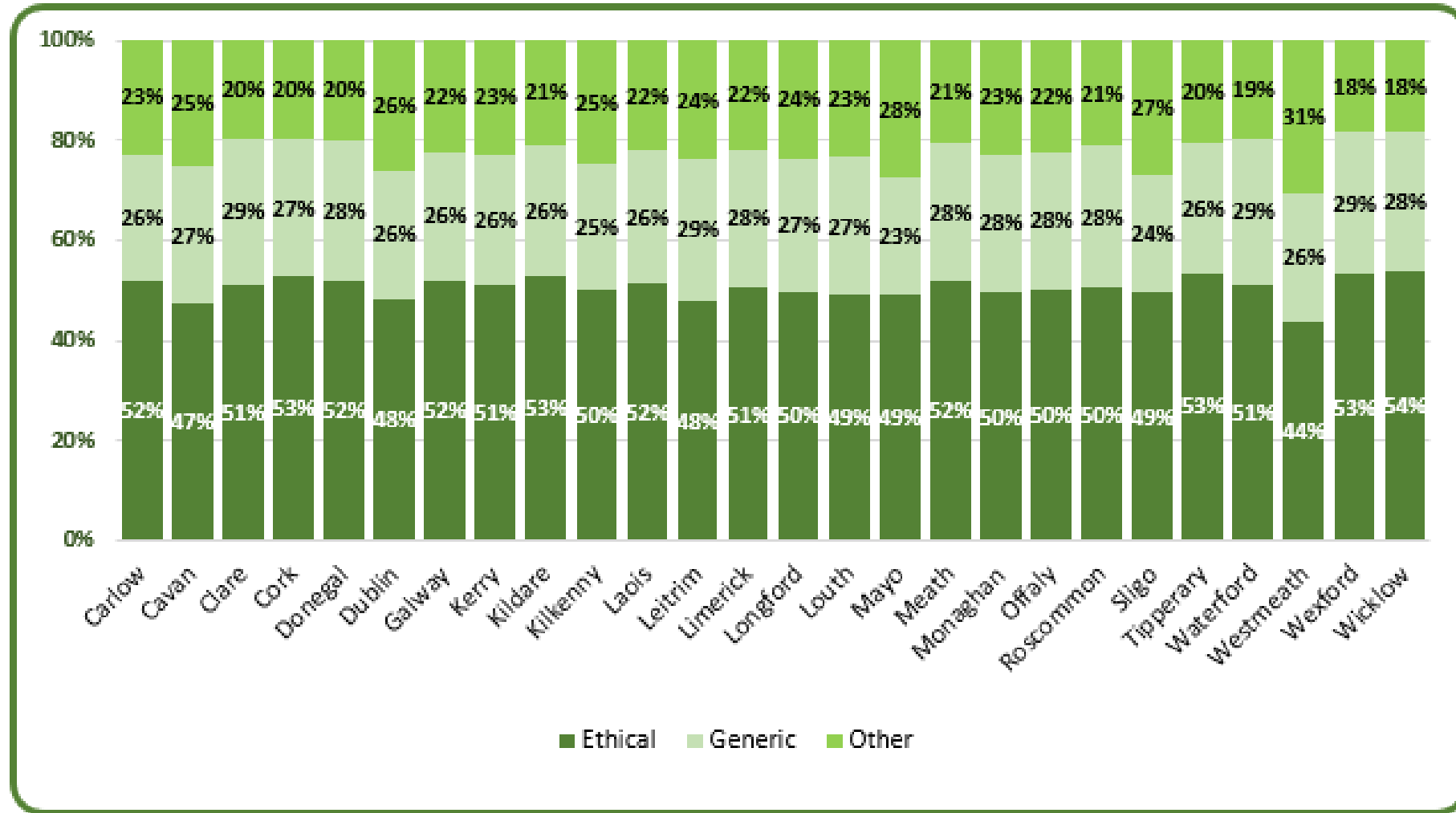
FULL YEAR 2019 VS 2018

County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	5.5%	5.6%	6.3%	2.3%
Carlow	3.7%	3.9%	4.9%	0.3%
Cavan	7.3%	7.3%	8.2%	2.8%
Clare	4.5%	4.6%	4.3%	8.5%
Cork	5.7%	5.7%	6.3%	3.5%
Donegal	8.0%	8.1%	8.6%	5.9%
Dublin	7.0%	7.2%	8.3%	2.5%
Galway	7.0%	7.1%	8.1%	1.3%
Kerry	6.2%	6.2%	5.7%	6.6%
Kildare	4.1%	4.2%	4.6%	2.0%
Kilkenny	1.3%	2.1%	2.3%	-2.9%
Laois	6.3%	6.5%	5.9%	6.5%
Leitrim	-0.9%	-0.8%	-1.8%	7.6%
Limerick	-0.5%	-0.4%	0.0%	-1.8%
Longford	8.2%	8.2%	9.0%	1.8%
Louth	3.5%	3.6%	4.9%	-0.3%
Mayo	12.0%	11.5%	12.2%	8.5%
Meath	3.8%	3.9%	3.9%	2.9%
Monaghan	1.8%	2.4%	4.1%	-3.5%
Offaly	-1.7%	-1.7%	-1.5%	-1.1%
Roscommon	9.7%	9.8%	10.5%	7.1%
Sligo	5.3%	5.5%	6.3%	-0.6%
Tipperary	5.9%	6.1%	6.5%	2.6%
Waterford	8.7%	9.0%	10.8%	1.0%
Westmeath	0.5%	0.7%	1.1%	0.0%
Wexford	5.4%	5.6%	6.6%	0.1%
Wicklow	-0.7%	-0.6%	0.1%	-4.3%



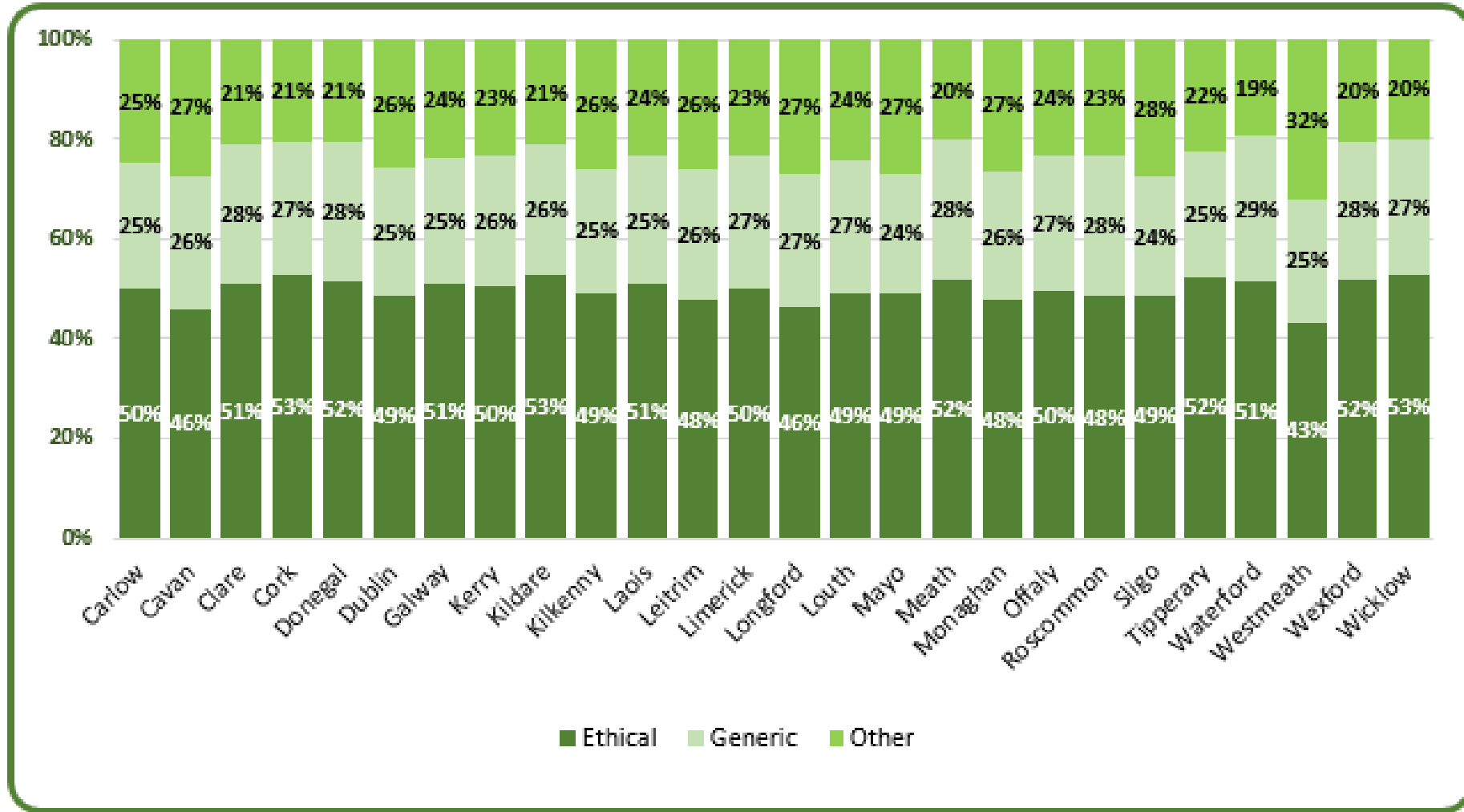
# MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN DECEMBER 2019



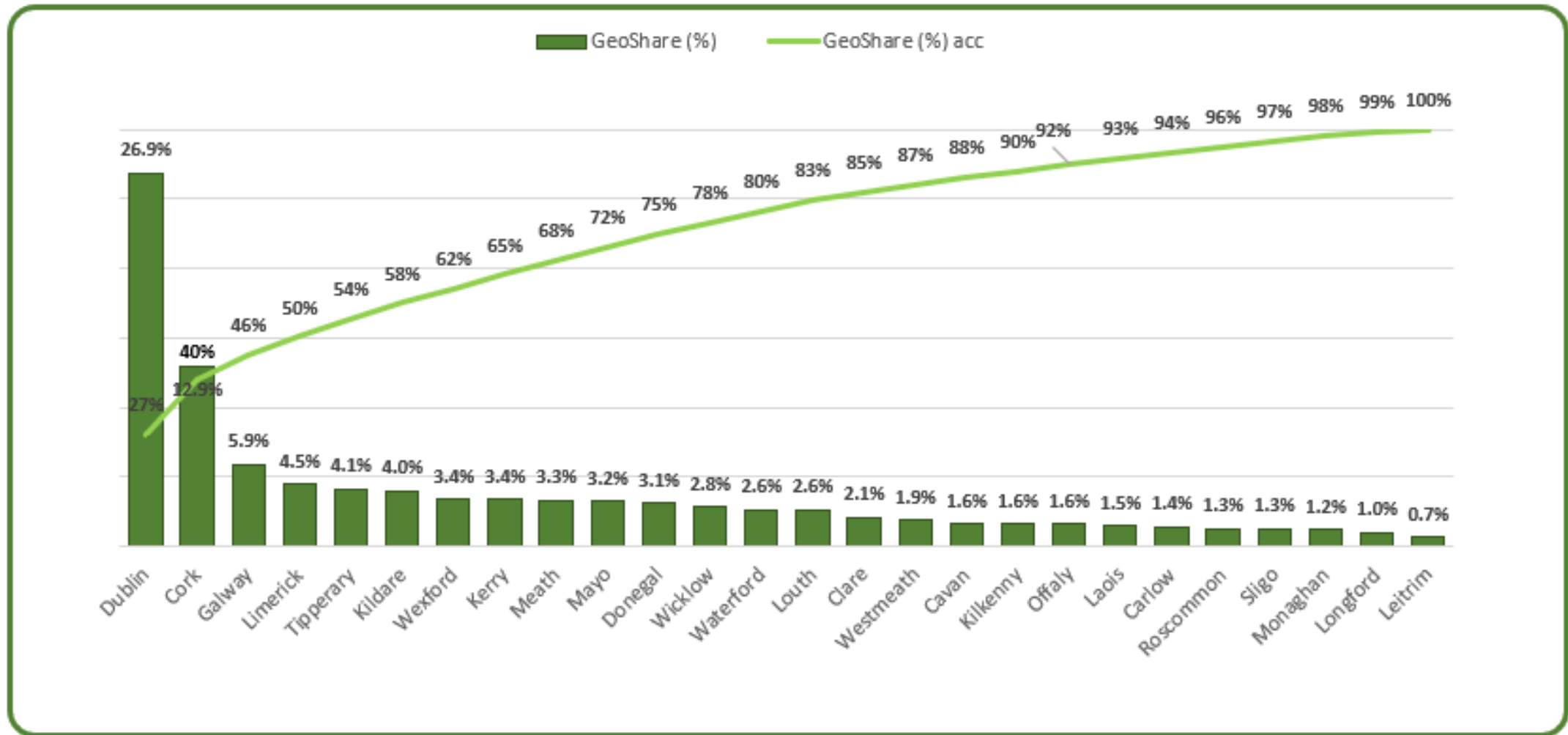
# MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN FULL YEAR OF 2019



# GEOGRAPHICAL SHARE BY COUNTY

FULL YEAR 2019 VALUE





# MANUFACTURER ANALYSIS

## TOTAL MARKET

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		5%			0%		0%		
1	+ Novartis	9%	6%	9%	6%		0%	1%	4%	1%	
2	+ Vertex Pharma UK	16%	6%	21%	6%		31%	0%	35%	0%	
3	+ Pfizer AG	-8%	6%	2%	6%		-2%	2%	-5%	2%	
4	+ Abbvie	-28%	5%	-15%	6%		-18%	0%	-6%	0%	
5	+ Janssen-Cilag	18%	5%	26%	5%		-7%	1%	2%	1%	
6	+ Teva Pharma Ind	-2%	4%	-8%	4%		-1%	10%	-8%	9%	
7	+ GlaxoSmithKline IE	6%	4%	5%	4%		4%	5%	3%	5%	
8	+ Celgene EU	13%	3%	18%	3%		5%	0%	10%	0%	
9	+ MSD	-10%	3%	-10%	3%		-2%	1%	-3%	2%	
10	+ Amgen	22%	3%	8%	3%		19%	0%	12%	0%	
11	+ AstraZeneca Pharma	2%	2%	-1%	2%		0%	1%	-3%	1%	
12	+ Novo Nordisk	8%	2%	12%	2%		3%	1%	6%	1%	
13	+ Bayer AG	3%	2%	3%	2%		-5%	1%	-6%	1%	
14	+ Bristol-Myers Squibb	17%	2%	15%	2%		15%	0%	4%	0%	
15	+ Roche	8%	2%	9%	2%		47%	0%	4%	0%	
16	+ Clonmel HC	-3%	2%	1%	2%		-6%	8%	-2%	8%	
17	+ Mylan	10%	2%	9%	2%		4%	4%	5%	4%	
18	+ Boehringer Ingelheim	2%	2%	3%	2%		-1%	1%	-3%	1%	
19	+ Sanofi	7%	2%	5%	2%		21%	3%	17%	3%	
20	+ Astellas	7%	2%	9%	2%		1%	0%	6%	0%	
21	+ Accord HC	46%	2%	58%	2%		26%	5%	46%	5%	
22	+ Rowa	1%	1%	-9%	1%		5%	5%	-3%	5%	
23	+ Nutricia MD	-7%	1%	-3%	1%		-4%	8%	-3%	8%	
24	+ UCB Pharma IE	5%	1%	8%	1%		4%	0%	4%	0%	
25	+ Biogen Idec	83%	2%	25%	1%		97%	0%	32%	0%	

# MANUFACTURER ANALYSIS

## PHARMACEUTICAL

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		6%			0%		0%		
1	+ Novartis	9%	6%	9%	6%		0%	1%	4%	1%	
2	+ Vertex Pharma UK	16%	6%	21%	6%		31%	0%	35%	0%	
3	+ Pfizer AG	-8%	6%	2%	6%		-2%	2%	-5%	2%	
4	+ Abbvie	-28%	5%	-15%	6%		-18%	0%	-6%	0%	
5	+ Janssen-Cilag	18%	5%	26%	5%		-7%	1%	2%	1%	
6	+ Teva Pharma Ind	-3%	4%	-8%	4%		-1%	10%	-8%	9%	
7	+ GlaxoSmithKline IE	6%	4%	5%	4%		4%	5%	3%	5%	
8	+ Celgene EU	13%	3%	18%	3%		5%	0%	10%	0%	
9	+ MSD	-10%	3%	-10%	3%		-2%	1%	-3%	2%	
10	+ Amgen	22%	3%	8%	3%		19%	0%	12%	0%	
11	+ AstraZeneca Pharma	2%	2%	-1%	2%		0%	1%	-3%	1%	
12	+ Novo Nordisk	8%	2%	12%	2%		3%	1%	6%	1%	
13	+ Bayer AG	3%	2%	3%	2%		-5%	1%	-6%	1%	
14	+ Bristol-Myers Squibb	17%	2%	15%	2%		15%	0%	4%	0%	
15	+ Roche	8%	2%	9%	2%		47%	0%	4%	0%	
16	+ Clonmel HC	-3%	2%	1%	2%		-6%	8%	-2%	8%	
17	+ Mylan	10%	2%	9%	2%		4%	4%	5%	4%	
18	+ Boehringer Ingelheim	2%	2%	3%	2%		-1%	1%	-3%	1%	
19	+ Sanofi	7%	2%	5%	2%		21%	3%	17%	3%	
20	+ Astellas	7%	2%	9%	2%		1%	0%	6%	0%	
21	+ Accord HC	46%	2%	58%	2%		26%	5%	46%	5%	
22	+ Rowa	1%	1%	-9%	1%		5%	5%	-3%	5%	
23	+ UCB Pharma IE	5%	1%	8%	1%		4%	0%	4%	0%	
24	+ Nutricia MD	-6%	1%	-3%	1%		-4%	8%	-3%	8%	
25	+ Biogen Idec	83%	2%	25%	1%		97%	0%	32%	0%	

# MANUFACTURER ANALYSIS

## ETHICAL

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		6%			-1%		-1%		
1	+ Novartis	9%	7%	9%	7%		0%	2%	4%	2%	
2	+ Vertex Pharma UK	16%	7%	21%	7%		31%	0%	35%	0%	
3	+ Pfizer AG	-8%	6%	2%	7%		-2%	3%	-4%	3%	
4	+ Abbvie	-28%	5%	-15%	6%		-18%	0%	-6%	0%	
5	+ Janssen-Cilag	18%	6%	26%	6%		-7%	1%	2%	1%	
6	+ GlaxoSmithKline IE	6%	4%	5%	4%		4%	7%	3%	6%	
7	+ Celgene EU	13%	4%	18%	3%		5%	0%	10%	0%	
8	+ MSD	-10%	3%	-10%	3%		-2%	2%	-3%	2%	
9	+ Amgen	22%	3%	8%	3%		19%	0%	12%	0%	
10	+ AstraZeneca Pharma	2%	3%	-1%	3%		0%	2%	-3%	2%	
11	+ Novo Nordisk	8%	2%	12%	2%		3%	1%	6%	1%	
12	+ Bayer AG	3%	2%	3%	2%		-5%	2%	-6%	2%	
13	+ Bristol-Myers Squibb	17%	2%	15%	2%		15%	1%	4%	1%	
14	+ Roche	8%	2%	9%	2%		47%	0%	4%	0%	
15	+ Boehringer Ingelheim	2%	2%	3%	2%		-1%	1%	-3%	1%	
16	+ Sanofi	7%	2%	5%	2%		21%	4%	17%	4%	
17	+ Teva Pharma Ind	-3%	2%	-6%	2%		4%	3%	-8%	3%	
18	+  Tollan	7%	2%	9%	2%		1%	1%	6%	1%	
19	+ Mylan	6%	2%	8%	2%		-3%	4%	2%	4%	
20	+ Nutricia MD	-6%	1%	-3%	2%		-4%	10%	-3%	10%	
21	+ UCB Pharma IE	5%	1%	8%	1%		4%	1%	4%	1%	
22	+ Biogen Idec	83%	2%	25%	1%		97%	0%	32%	0%	
23	+ Merck Serono	76%	1%	23%	1%		-23%	0%	-13%	1%	
24	+ ULM Manuf	26%	1%	39%	1%		32%	2%	52%	1%	
25	+ Lilly	20%	1%	13%	1%		6%	0%	2%	0%	

# MANUFACTURER ANALYSIS

## GENERIC

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		2%			3%		3%		
1	+ Teva Pharma Ind	-2%	26%	-9%	27%		-3%	27%	-8%	28%	
2	+ Accord HC	42%	19%	52%	17%		26%	17%	36%	16%	
3	+ Clonmel HC	-5%	10%	4%	11%		-9%	11%	4%	12%	
4	+ Rowa	6%	12%	-7%	11%		10%	13%	-1%	13%	
5	+ Krka Pharma	-19%	8%	-5%	9%		-18%	8%	1%	9%	
6	+ Pinewood	10%	7%	-2%	6%		6%	5%	-4%	5%	
7	+ Actavis Group	-40%	4%	-30%	5%		-35%	5%	-23%	6%	
8	+ Mylan	29%	5%	12%	5%		23%	5%	11%	4%	
9	+ Fannin	19%	2%	12%	2%		41%	2%	33%	2%	
10	+ Bluefish	88%	2%	92%	2%		54%	4%	50%	3%	
11	+ Wockhardt	91%	2%	63%	1%		94%	2%	72%	2%	
12	+ Galen	-25%	0%	0%	0%		-22%	0%	2%	0%	
13	+ PCO Manuf	0%	0%	-1%	0%		0%	0%	-1%	0%	
14	+ Consilient Health	19%	0%	-7%	0%		39%	0%	-5%	0%	
15	+ Rosemont Pharma	0%	0%	14%	0%		-40%	0%	0%	0%	
16	+ Phoenix Lab	46%	0%	99%	0%		46%	0%	99%	0%	
17	+ RPH Pharma	54%	0%	232%	0%		45%	0%	217%	0%	
18	+ Orion Corp	6%	0%	-5%	0%		5%	0%	-6%	0%	
19	+ Pharmathen	25%	0%	25%	0%		25%	0%	43%	0%	
20	+ Ranbaxy IE	54%	0%	-25%	0%		46%	0%	-22%	0%	
21	+ Aribamed	-11%	0%	-5%	0%		9%	0%	4%	0%	
22	+ Apotex EU	-25%	0%	74%	0%		1%	0%	87%	0%	
23	+ Advanz Pharma IE	-15%	0%	12%	0%		-21%	0%	15%	0%	
24	+ Baxter Hc	-18%	0%	2%	0%		-18%	0%	2%	0%	
25	+ Fresenius Kabi AG	5%	0%	108%	0%		5%	0%	108%	0%	

# MANUFACTURER ANALYSIS

OTC (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	3%		1%			1%		-1%		
1	+ Johnson & Johnson	8%	22%	9%	23%		3%	9%	9%	10%	
2	+ Takeda IE	3%	18%	3%	19%		4%	17%	5%	17%	
3	+ Reckitt Benckiser IE	1%	10%	-1%	10%		-2%	13%	-2%	13%	
4	+ Bausch & Lomb	-10%	6%	-6%	7%		-8%	8%	-5%	9%	
5	+ Clonmel HC	-5%	5%	-4%	5%		-7%	11%	-5%	12%	
6	+ Fannin	-3%	4%	-6%	4%		-4%	3%	-6%	3%	
7	+ Rowa	16%	4%	9%	3%		18%	5%	8%	4%	
8	+ HRA Pharma	20%	4%	12%	3%		18%	1%	11%	1%	
9	+ Phoenix Lab	17%	4%	0%	3%		17%	8%	0%	5%	
10	+ Pfizer AG	4%	3%	4%	3%		5%	2%	4%	2%	
11	+ Pinewood	-9%	3%	-14%	3%		-13%	4%	-15%	4%	
12	+ Perrigo Co.	-14%	2%	-1%	3%		-4%	1%	2%	1%	
13	+ Sanofi	6%	2%	1%	2%		3%	4%	0%	4%	
14	+ Allergan IE	-20%	2%	-24%	2%		-17%	2%	-32%	2%	
15	+ Mylan	5%	2%	2%	2%		10%	4%	6%	4%	
16	+ GlaxoSmithKline IE	-3%	1%	-1%	1%		-5%	1%	-4%	2%	
17	+ GlaxoSmithKline HC	1%	1%	1%	1%		-1%	1%	1%	1%	
18	+ Ricesteele Manuf	16%	1%	-2%	1%		15%	1%	-3%	1%	
19	+ Bayer AG	-4%	0%	-12%	1%		7%	1%	-9%	1%	
20	+ RPH Pharma	-5%	0%	-1%	0%		8%	0%	8%	0%	
21	+ Novartis	-8%	0%	-10%	0%		-8%	1%	-10%	1%	
22	+ Teofarma	-9%	0%	15%	0%		1%	0%	11%	0%	
23	+ PCD Manuf	5%	0%	-10%	0%		5%	0%	-10%	0%	
24	+ Gedeon Richter	-12%	0%	-6%	0%		-12%	0%	-6%	0%	
25	+ Teva Pharma Ind	-12%	0%	-9%	0%		0%	0%	-10%	0%	



# MANUFACTURER ANALYSIS

## PATIENT CARE (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	4%		6%			0%		3%		
1	+ Coloplast UK	6%	12%	8%	12%		8%	5%	9%	5%	
2	+ Abbott Diabetes Care	-4%	10%	8%	10%		-10%	7%	-3%	7%	
3	+ Ascensia Diabetes Care IE	2%	9%	5%	9%		1%	9%	5%	8%	
4	+ Medtronic Minimed	30%	9%	33%	8%		20%	2%	23%	1%	
5	+ Roche Diabetes Care	-12%	7%	-11%	8%		-6%	7%	-5%	7%	
6	+ LifeScan	1%	7%	1%	7%		1%	7%	0%	7%	
7	+ Hollister	9%	6%	4%	6%		6%	3%	4%	2%	
8	+ B. Braun MD	0%	4%	4%	4%		1%	1%	4%	1%	
9	+ Salts HC	8%	4%	10%	4%		9%	2%	9%	2%	
10	+ Convatec HC	-9%	3%	-2%	3%		-15%	3%	-7%	3%	
11	+ Becton Dickinson & Co.	0%	3%	3%	3%		-4%	3%	2%	3%	
12	+ Dansac	28%	2%	24%	2%		23%	1%	22%	1%	
13	+ Scope Ophthalmics	19%	2%	24%	2%		21%	7%	27%	6%	
14	+ Novo Nordisk	-6%	2%	-6%	2%		-6%	2%	-7%	2%	
15	+ C.R. Bard	10%	2%	7%	2%		8%	4%	6%	4%	
16	+ 3M IE	51%	2%	29%	2%		17%	3%	14%	3%	
17	+ DexCom	144%	2%	113%	1%		177%	0%	124%	0%	
18	+ Eakin	25%	2%	7%	1%		35%	1%	6%	1%	
19	+ Nutricia MD	-29%	1%	-3%	1%		-22%	0%	-19%	0%	
20	+ Alliance Pharma	-4%	1%	6%	1%		-1%	1%	6%	1%	
21	+ Medicon IE	-10%	1%	-12%	1%		1%	1%	4%	1%	
22	+ Premier MD	-6%	1%	11%	1%		-1%	0%	11%	0%	
23	+ Smith & Nephew	-18%	1%	-14%	1%		-19%	2%	-3%	3%	
24	+ Lab Thea	44%	1%	64%	1%		45%	2%	64%	2%	
25	+ Clonmel HC	-19%	1%	-3%	1%		-10%	1%	6%	2%	

# MANUFACTURER ANALYSIS

SUPPLEMENTS (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2019		MAT December 2019		Last 12 Months	December 2019		MAT December 2019		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		3%			-3%		2%		
1	+ Bio-oil research	-2%	28%	1%	29%		-2%	10%	1%	11%	
2	+ Sona Nut	-13%	14%	-3%	15%		-12%	28%	-4%	29%	
3	+ MacuVision EU	-10%	7%	-10%	7%		-10%	5%	-10%	5%	
4	+ PharmaSource	13%	5%	19%	6%		19%	2%	18%	2%	
5	+ PrecisionBiotics	32%	5%	16%	5%		32%	3%	16%	3%	
6	+ Medisource	218%	6%	-13%	4%		174%	3%	44%	3%	
7	+ QM Specials	-6%	4%	21%	4%		20%	2%	26%	2%	
8	+ BBI HC	48%	4%	29%	4%		2%	5%	4%	5%	
9	+ Pfizer AG	5%	3%	2%	3%		7%	7%	3%	7%	
10	+ Scope Hc	3%	3%	23%	2%		5%	5%	24%	4%	
11	+ Bausch & Lomb	-12%	2%	-15%	2%		-11%	3%	-15%	3%	
12	+ Pharma Nord	-10%	2%	-5%	2%		-6%	2%	-4%	2%	
13	+ Elements	-39%	1%	-5%	2%		-25%	0%	-2%	1%	
14	+ Kelkin	566%	2%	407%	2%		-12%	3%	35%	4%	
15	+ Mylan	-10%	1%	-8%	1%		-10%	1%	-8%	1%	
16	+ Lamberts HC	24%	1%	-29%	1%		35%	1%	-41%	0%	
17	+ Natures Aid	-45%	1%	80%	1%		-50%	2%	81%	2%	
18	+ Solvotrin Therapeutics	53%	1%	102%	1%		53%	1%	101%	1%	
19	+ Blackhall Pharma Distr	0%	1%	56%	1%		3%	1%	53%	1%	
20	+ Vitabiotics	-29%	0%	0%	1%		-14%	1%	2%	1%	
21	+ Seven Seas	3%	1%	-7%	1%		-2%	2%	-11%	1%	
22	+ Rowa	39%	1%	3%	0%		39%	3%	3%	2%	
23	+ A Nelson & Co	-7%	0%	-6%	0%		-7%	1%	-6%	1%	
24	+ Greenlight Supplements	117%	0%	386%	0%		57%	0%	296%	0%	
25	+ Scope Ophthalmics	213%	1%	359%	0%		418%	1%	781%	1%	

**THANK YOU**

**OBRIGADO**

**GO RAIBH MAITH AGAT**

**DANKE**



**GRACIAS**

**MERCI**

**Θ'EMATA**

**GRAZIE**