

# Pharmacy Prescription Market Trends COVID-19 Special Study

**HMR Ireland**

30th April 2020



At HMR we are committed to support every effort in this huge challenge against COVID-19 pandemic.

We have mobilised resources to better understand the evolution of the events and patient behaviours in community pharmacies.

We are focused on patients and on everyone with a role in healthcare. In an attempt to change lives and continue to advance in this new reality.

HMR would like to take this opportunity to thank all Irish pharmacies and healthcare related professionals for their daily efforts.

# Thank You.





# About us.

HMR is a multinational company specialised in developing Knowledge for the Healthcare sector.

Today, HMR is a reference company for the knowledge it can provide and for the specialised consultancy services it is able to make available to all healthcare players.

Specialised in developing Knowledge based on daily information collected at pharmacy level, HMR reinforces this information by combining data from different sources, allowing our Clients to take well informed decisions.

 **4** countries  
Portugal  
Spain  
Ireland  
Germany

 **170** Team experts

 **+200** clients in Europe

 **2.500** regular users

 **+19.500** pharmacies

# MEETING THE NEEDS OF THE PHARMACEUTICAL INDUSTRY WITH SOLUTIONS ACROSS 6 KEY AREAS



**Business  
Intelligence**



**Consulting**



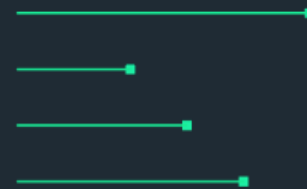
**Market  
Analytics**



**Marketing  
Management**



**Sales  
Management**



**Supply Chain  
Optimization**

## Our solutions.

We provide different types of solutions and skills to share the full power of knowledge.

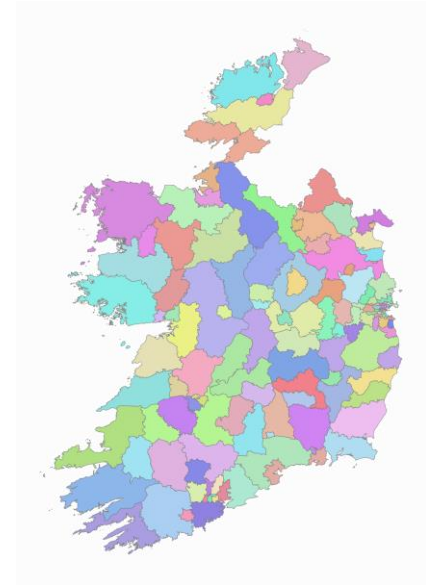
Solutions have the most suitable level of customisation to all our customers, independent of the market segment or product life cycle stage.

# INFORMATION BASED ON DISPENSARY PHARMACY SELL-OUT DATA

Represents the actual pharmaceutical products dispensed to a patient, independent of the distribution channel

## Panel.

- 73% coverage of the Irish pharmacies
- Over 75% of market sales coverage
- Geographically evenly distributed
- Balanced composition comprising 72% of the chains and groups and 68% of the independents and small group pharmacies
- The largest market data pharmacy panel



## HMR Regions.

- The highest geographical detail with 141 Regions
- 9 panel pharmacies of 13 pharmacies per region, in average
- Respect county boundaries



**HMR**  
**73%** Market coverage (numeric)  
 1.363 pharmacies from a total of  
 1.877 pharmacies

The data is received daily at transaction level and the sales of the remaining pharmacies are extrapolated on a regional basis.

# COVID-19 SPECIAL STUDY.

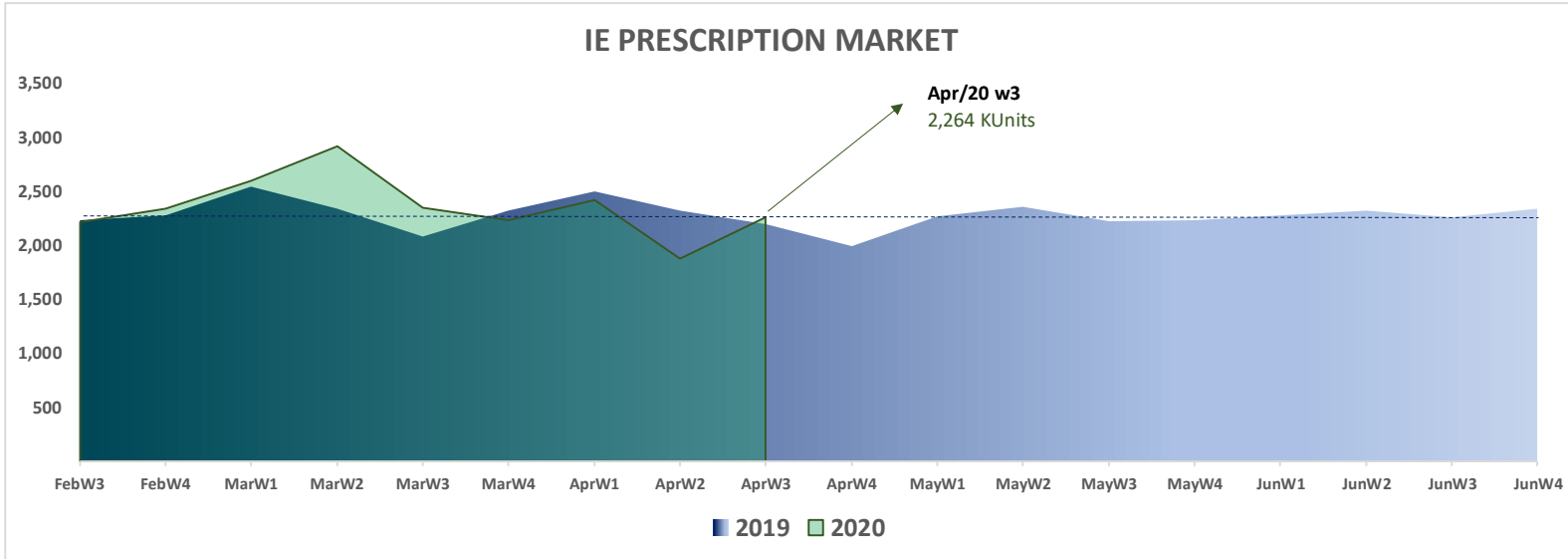
## PHARMACY PRESCRIPTION MARKET TRENDS

### Key principles of the study:

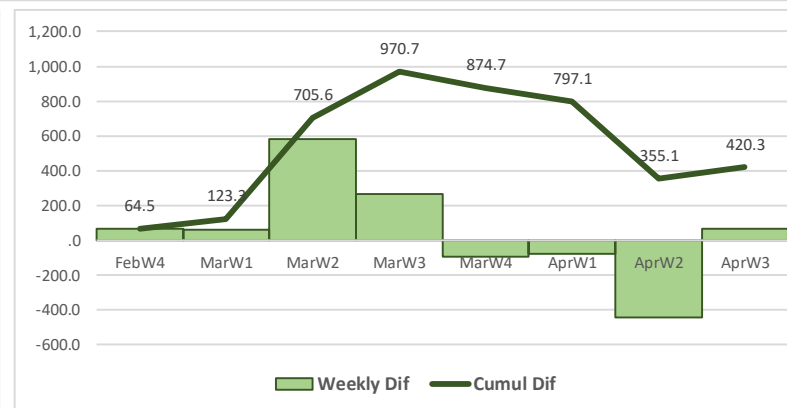
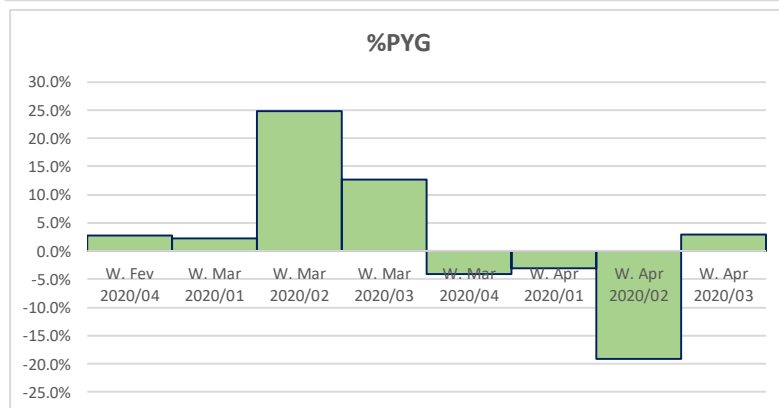
- ❖ Irish community pharmacy market data
- ❖ All community pharmacy dispensary products, detailing trends in units for main and specific segments of prescribed medicines
- ❖ Weekly data considering seven day weeks, starting on the first day of the month
- ❖ Weekly trends compared between different timepoints, namely with previous period (previous week) and previous year (same week in previous year)
- ❖ The cumulative balance in the COVID period shows the weekly accumulated unit sales difference, between 2020 and 2019, starting on the 4th week of February as the week of the first confirmed COVID-19 case in Ireland
- ❖ Considered year to date pre-COVID-19 vs last year



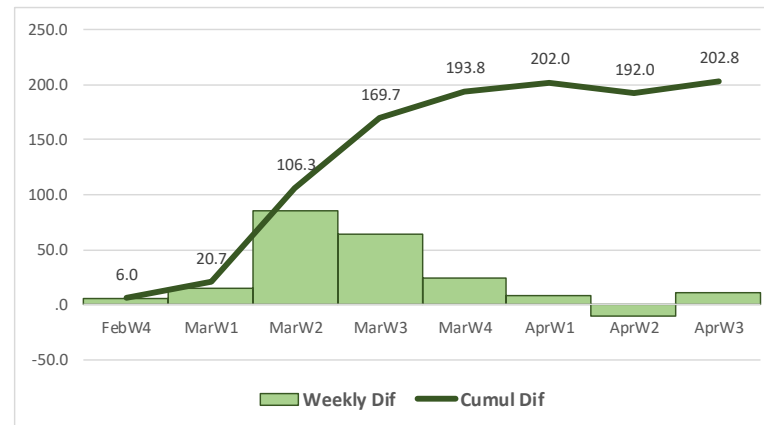
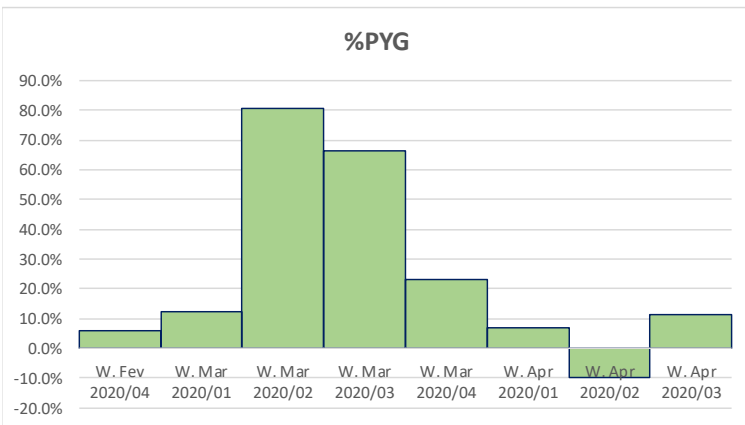
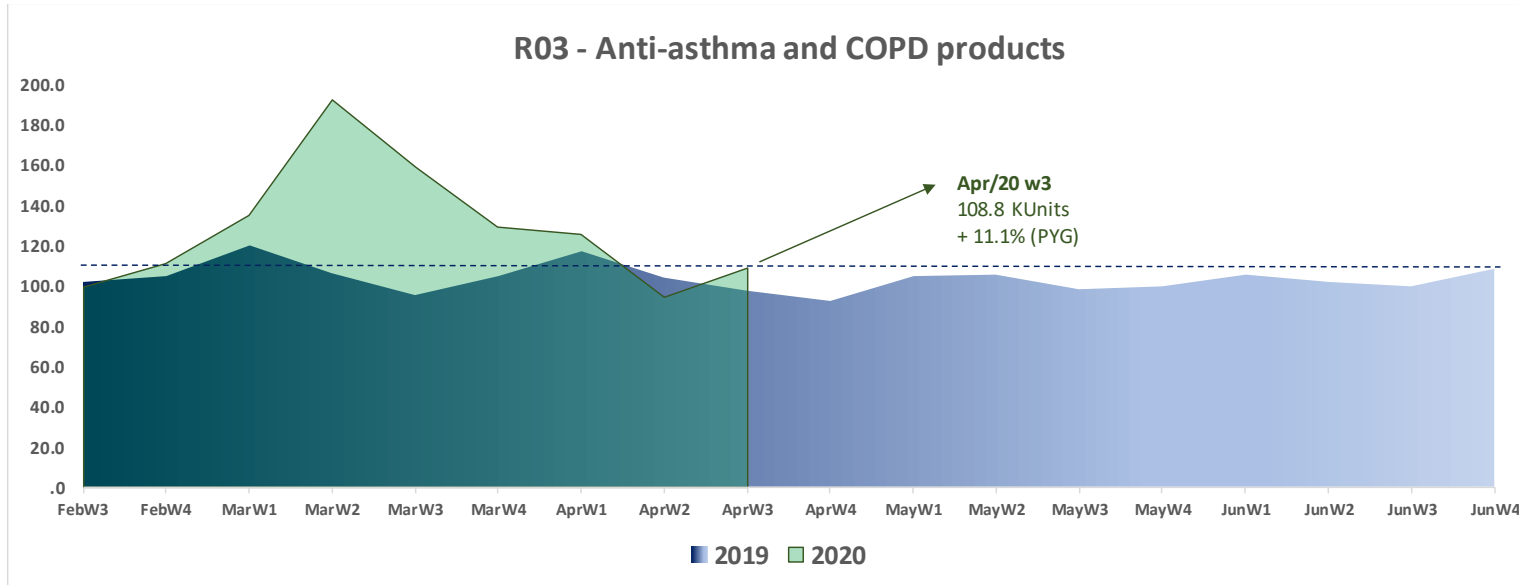
The **prescription market** shows a cumulative growth of 2.3% and seems to be stabilising, after an upper peak in the 2<sup>nd</sup> week of March and a lower peak in the 2<sup>nd</sup> week of April



- ❖ In January and February the dispensary market and its main therapeutic classes experienced weekly sales with very similar trends to the homologous weeks of 2019.
- ❖ This scenario started to change at the end of February and peaking in the second week of March.
- ❖ Lower values than last year started in the 4th week of March, peaking in the 2nd week of April and seemed to start to stabilise in the 3rd week of April.
- ❖ The cumulative balance in the COVID period shows a 2.3% increase in the units dispensed this year vs last year.



The **respiratory** market shows a cumulative growth of 23.8% and seems to be stabilising after a smooth reduction that followed the upper peak in the 2<sup>nd</sup> week of March



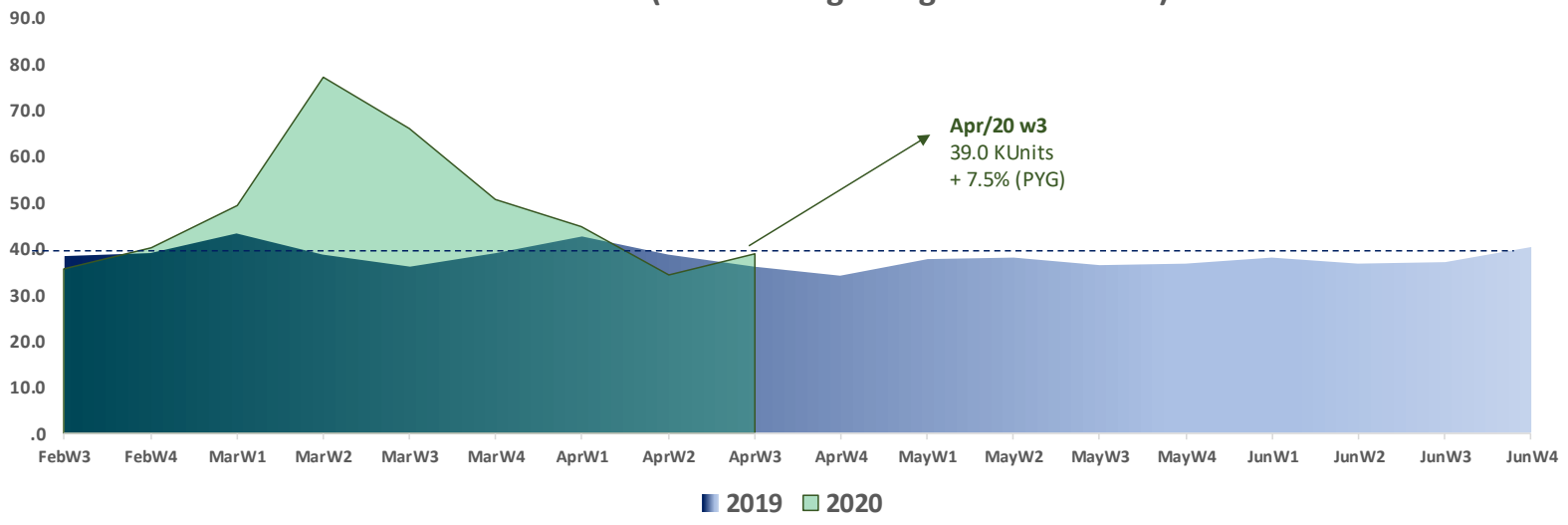
- ❖ Adults and children with long-term medical conditions including cardiac and respiratory conditions or with any condition that can compromise respiratory function were identified as groups who are at high-risk of developing severe illness from COVID-19<sup>1</sup>.
- ❖ Regardless of the efforts to assure patients that there is no national shortage of asthma and COPD medication, increasing fears around supply issues seem to have grown in these patients.
- ❖ Asthma Society of Ireland has appealed to people with asthma and COPD to refrain from stockpiling their medications during the coronavirus pandemic<sup>2</sup>.
- ❖ The cumulative balance in the COVID period shows a 23.8% increase in the units dispensed this year vs last year.



**Salbutamol** medicines achieved the highest growth in March  
 In the 2<sup>nd</sup> week of March the increase vs last year was of 98.6%

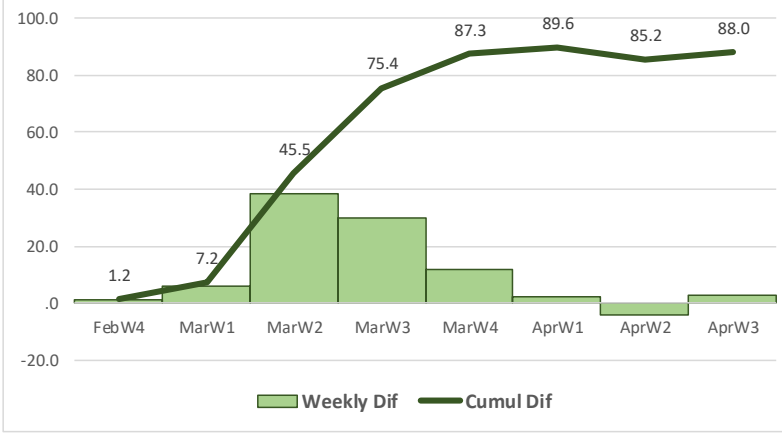
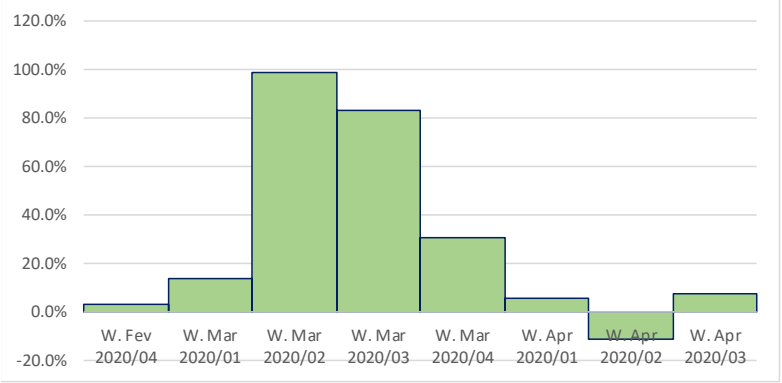


Salbutamol (Short-acting B2-agonists inhalant)

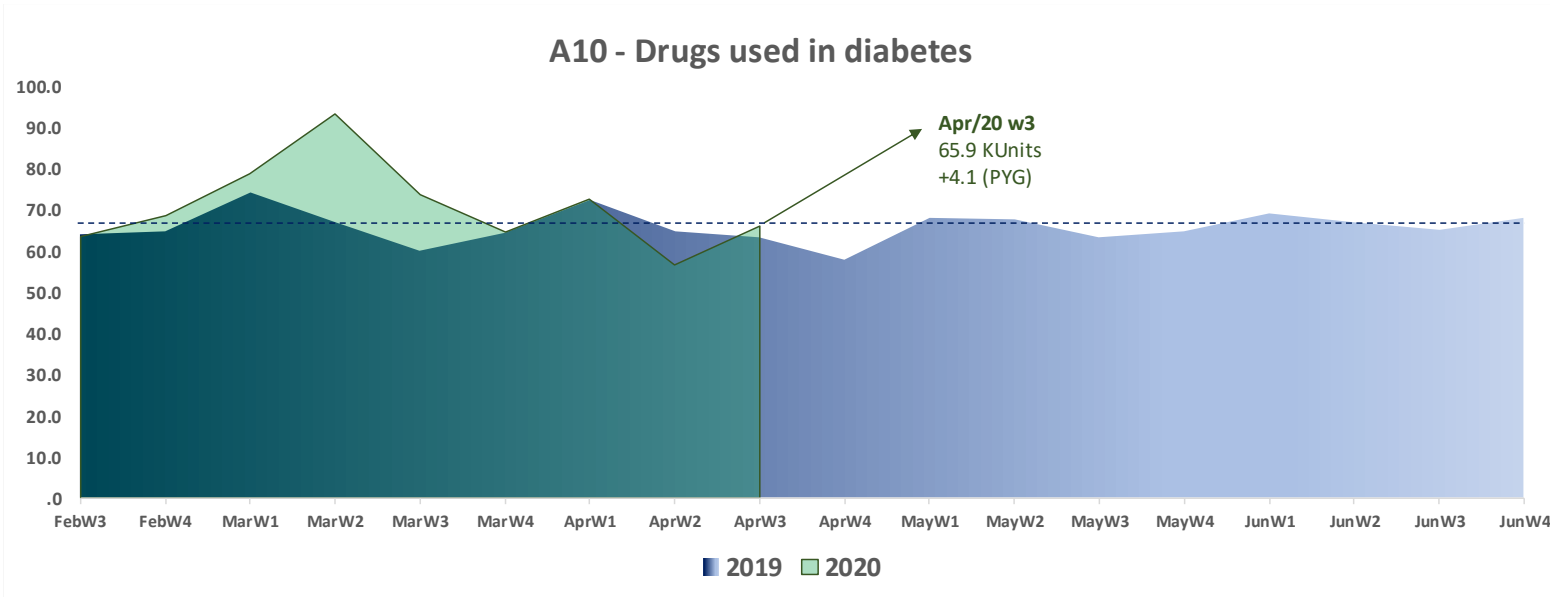


- ❖ Salbutamol is a short acting  $\beta$ 2 receptor agonist used to relieve symptoms of Asthma and COPD such as coughing, wheezing and feeling breathless<sup>1</sup>. It works by relaxing the muscles of the airways into the lungs, making it easier to breathe<sup>1</sup>.
- ❖ Salbutamol inhalers are called 'relievers' because they provide the patient a quick relief from breathing problems<sup>1</sup>.
- ❖ Salbutamol is available as an inhaler, nebuliser or in tablets, capsules or syrup for those who are not able to use an inhaler<sup>1</sup>.
- ❖ Being considered a vital medicine for these conditions, Salbutamol inhalers have been hit by an increased demand and the sales have spiked as a result of the coronavirus pandemic.
- ❖ The cumulative balance in the COVID period shows a 28% increase in the units dispensed this year vs last year.

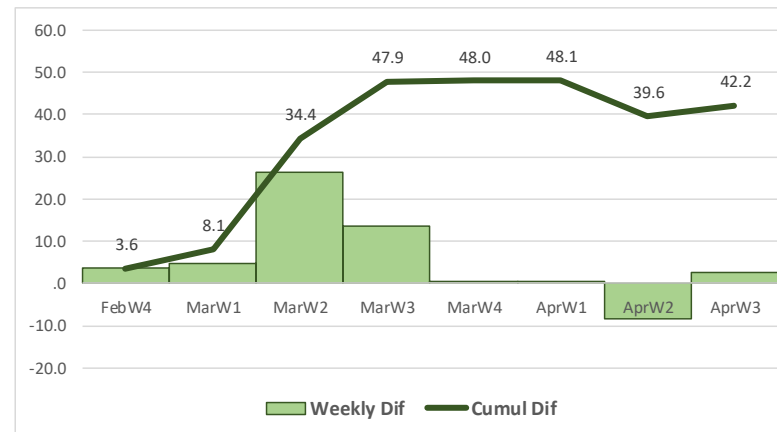
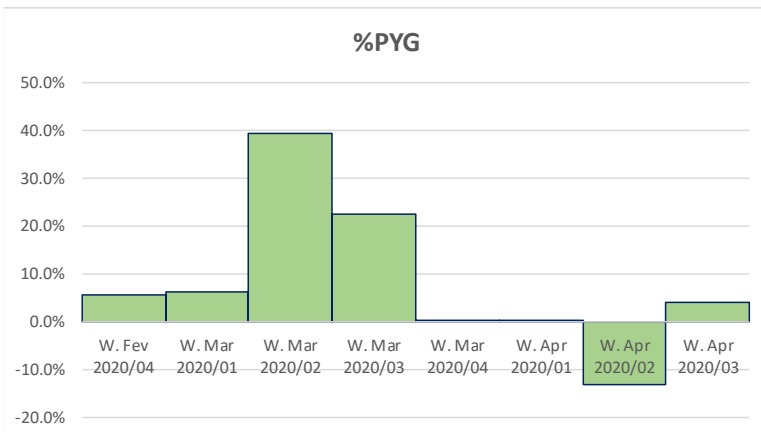
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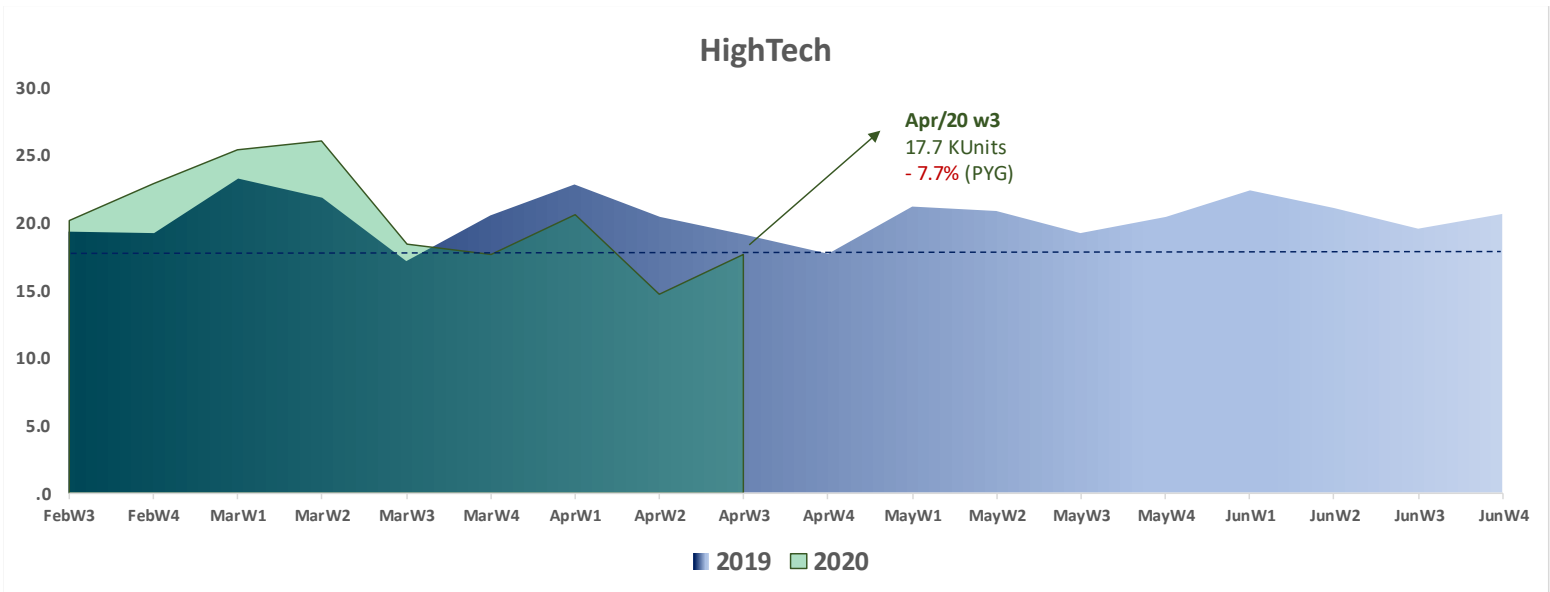
**Diabetes** market peaked in the 2<sup>nd</sup> and 3<sup>rd</sup> weeks of March keeping similar trends to last year in the remaining weeks



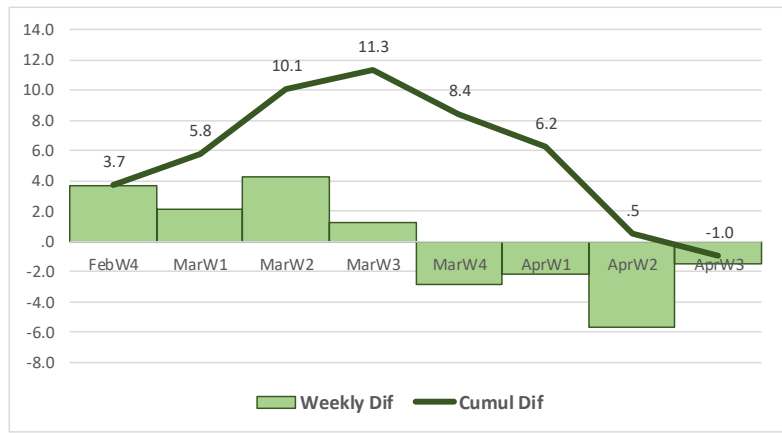
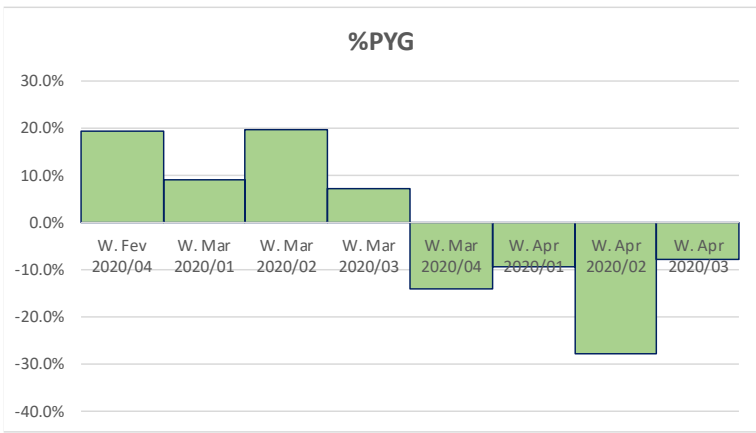
- ❖ Diabetes medicines refer to drugs which are developed to stabilize and control blood glucose levels. The market of diabetes care drugs is growing due to increased diabetes prevalence among populations.
- ❖ Diabetes represents 5% of the market value and 3% of its units.
- ❖ The cumulative balance in the COVID period shows a 7.9% increase in the units dispensed this year vs last year.



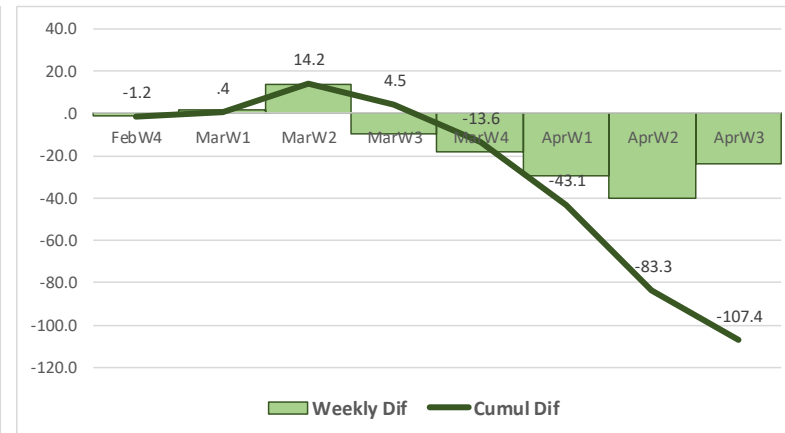
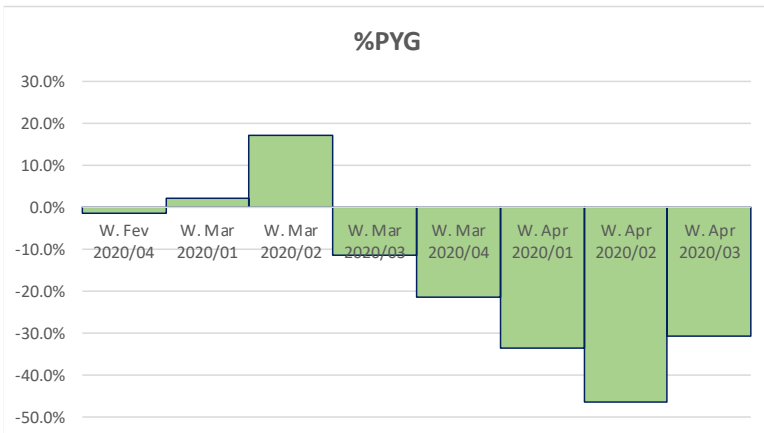
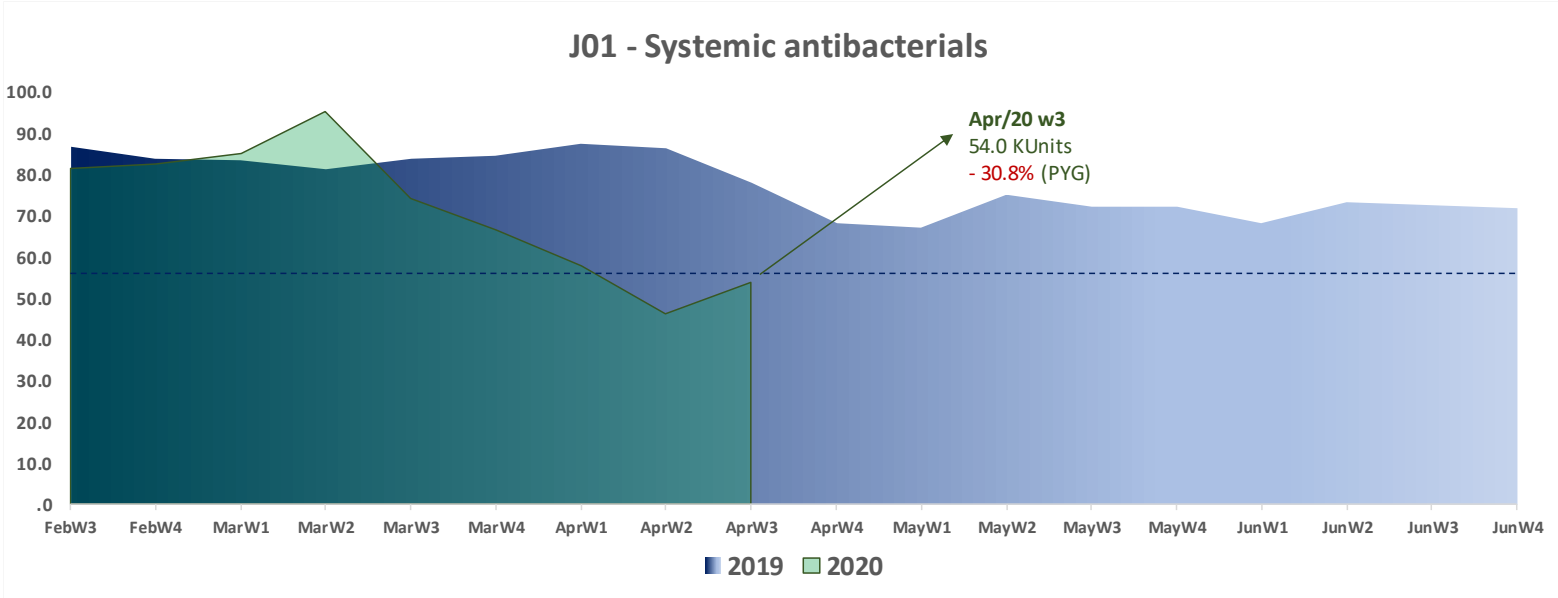
**High-tech's** cumulative balance shows a full alignment with last years performance with the slight increase occurred in March being compensated in April



- ❖ High-Tech's represents 42% of the market value and 0.9% of its units.
- ❖ Cumulative balance in the COVID period shows a 0.6% decrease in the units dispensed this year vs last year.

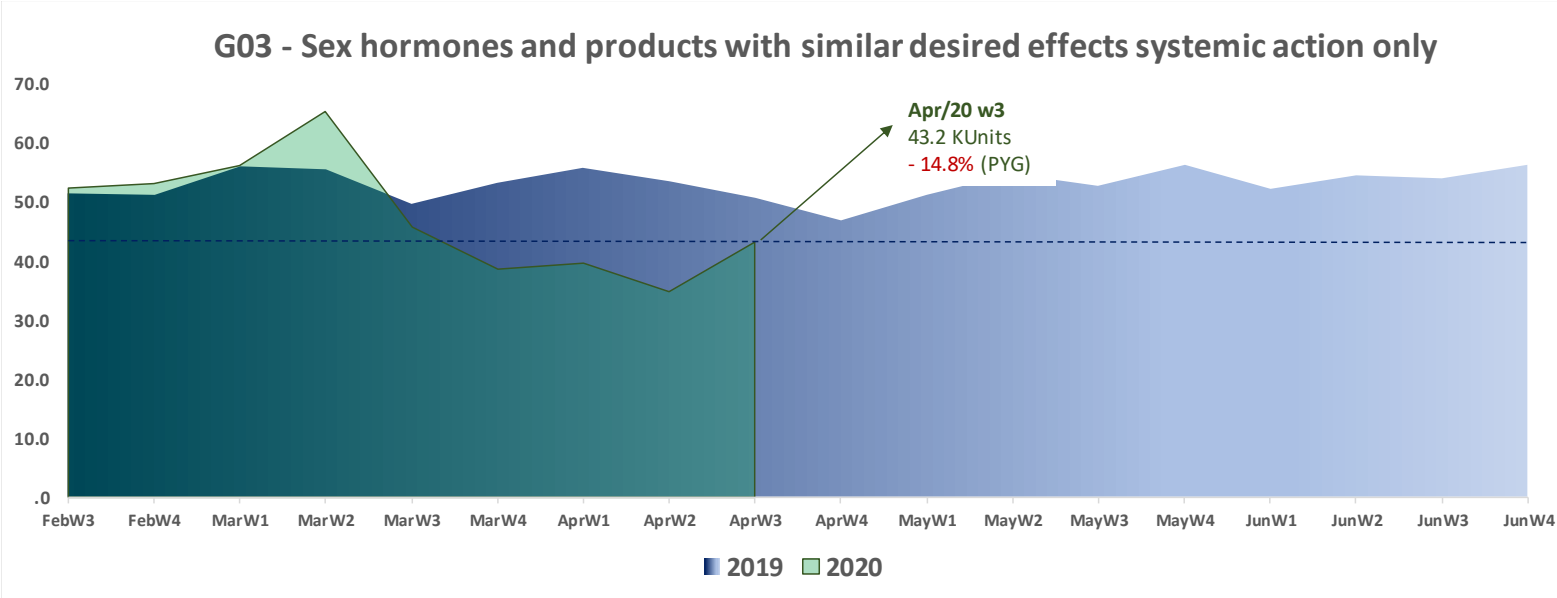


With mainly oral **antibiotics** the J01 class is showing a significant and constant units decrease vs last year

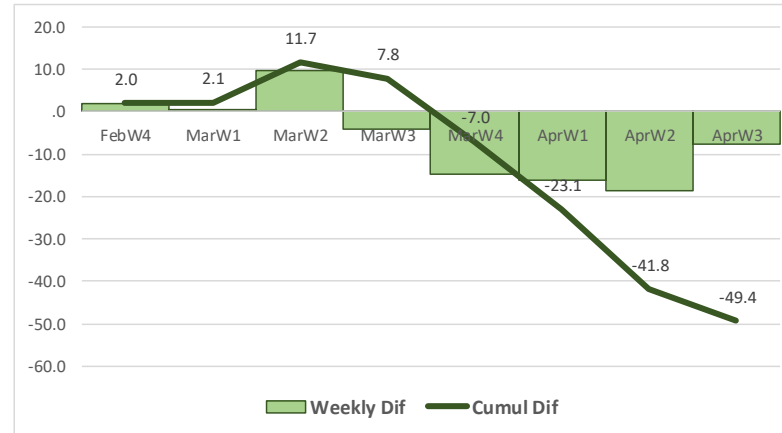
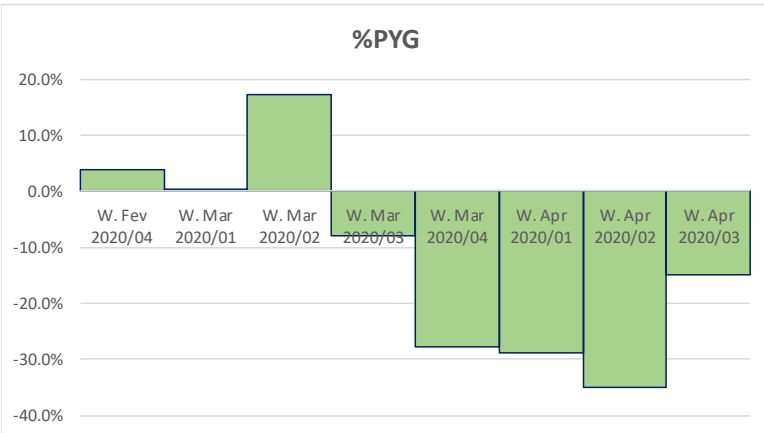


- ❖ The Systemic antibacterial market has suffered a substantial decrease leading to questions being raised regarding patient access to the healthcare system.
- ❖ The isolation measures should also be taken into consideration as a potential justification for this phenomenon. The fact that all of the population is being submitted to a mandatory isolation might be reducing the likelihood of transmission of infectious agents and potential injuries. Also schools, which are natural locations for the spread of infectious diseases, are now closed.
- ❖ The cumulative balance in the COVID period shows a 16% decrease in the units dispensed this year vs last year.

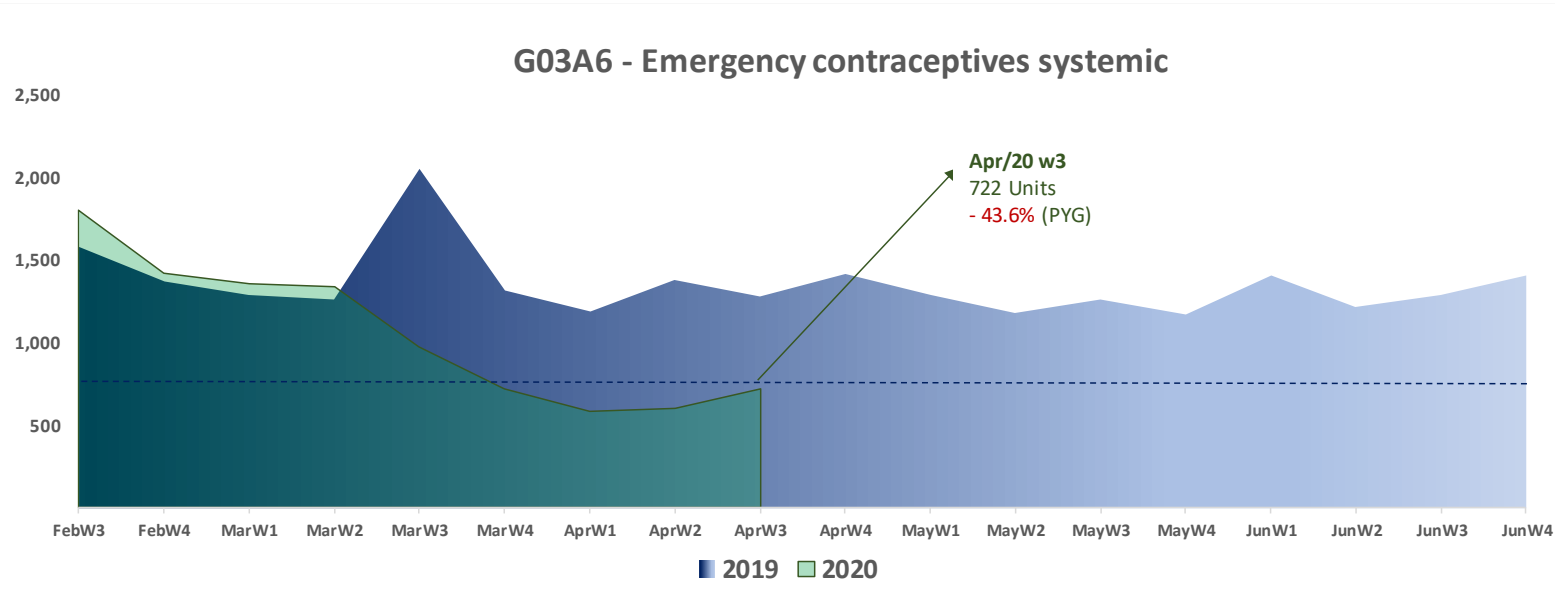
**Contraceptives** G03 class products have been decreasing and the cumulative balance is now -11.6%



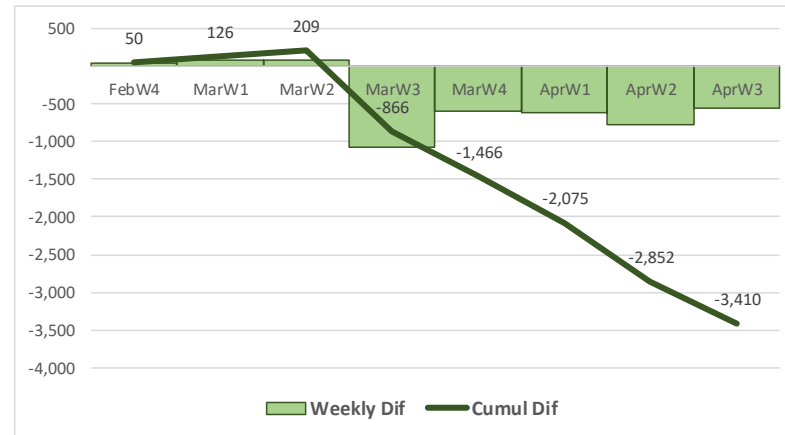
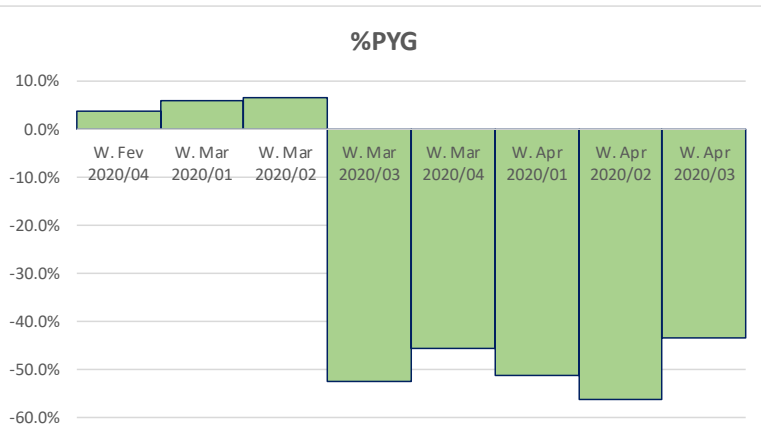
- ❖ The sex hormones and products with similar effects (G03 ATC class) had a 17% peak in the 2nd week in March and have been decreasing since
- ❖ The cumulative balance in the COVID period shows a 11.6% decrease in the units dispensed this year vs last year.



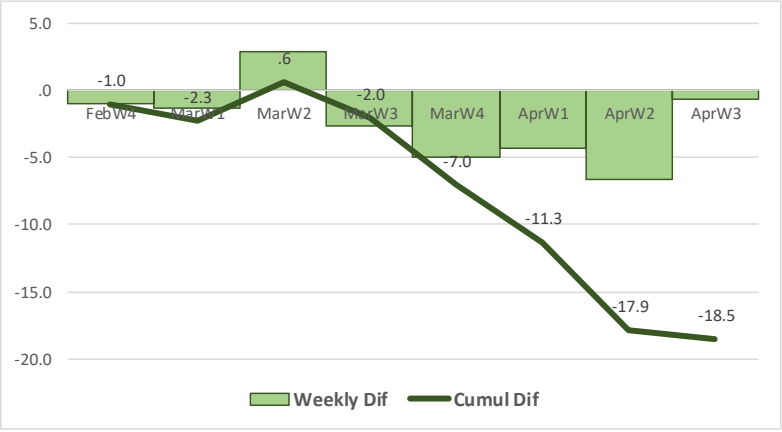
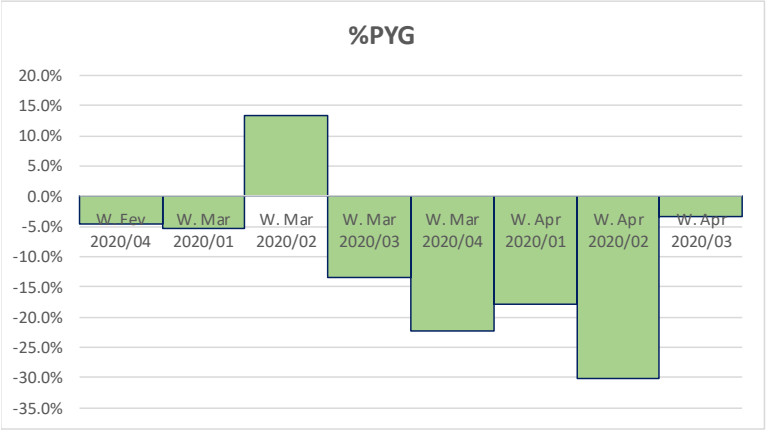
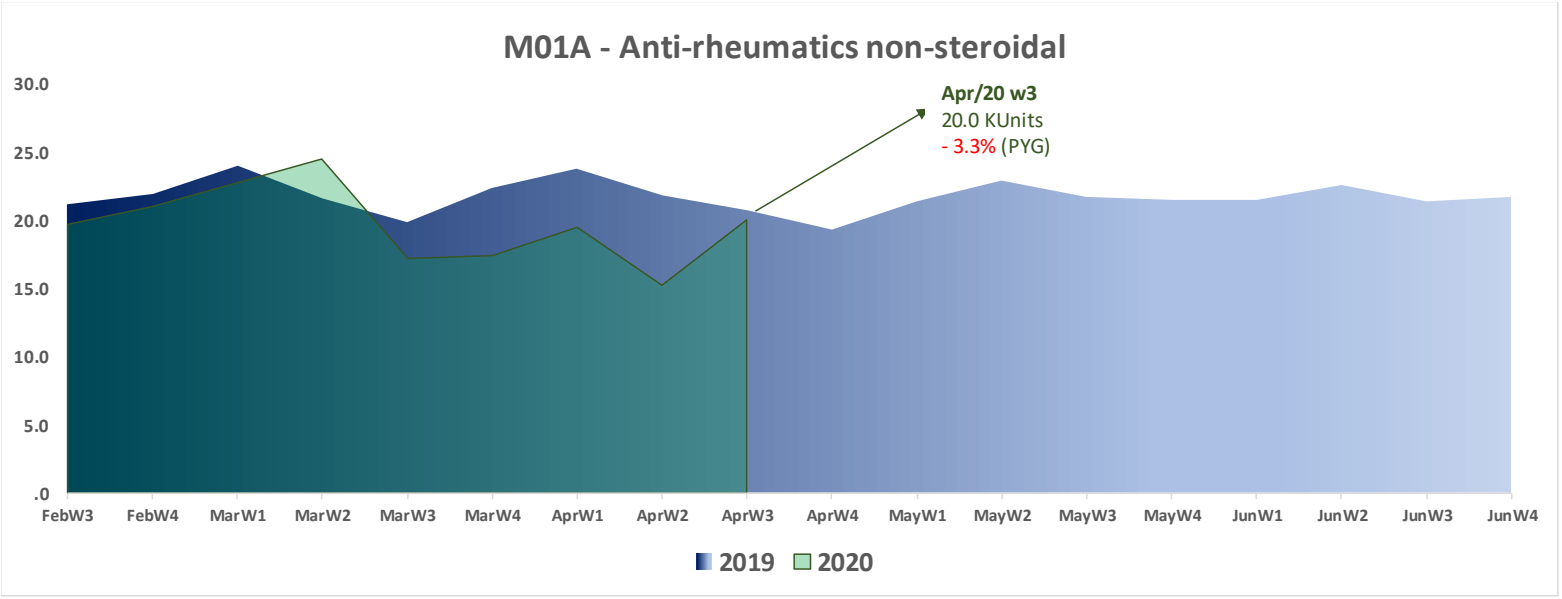
The **emergency contraceptives** were having slightly more sales than last year but that changed from 3<sup>rd</sup> week onwards



- ❖ The emergency contraceptives class was showing a slight growth vs last year, without a high peak this year and has been significantly decreasing since the 3<sup>rd</sup> week in March
- ❖ The cumulative balance in the COVID period shows a 30.7% decrease in the units dispensed this year vs last year.



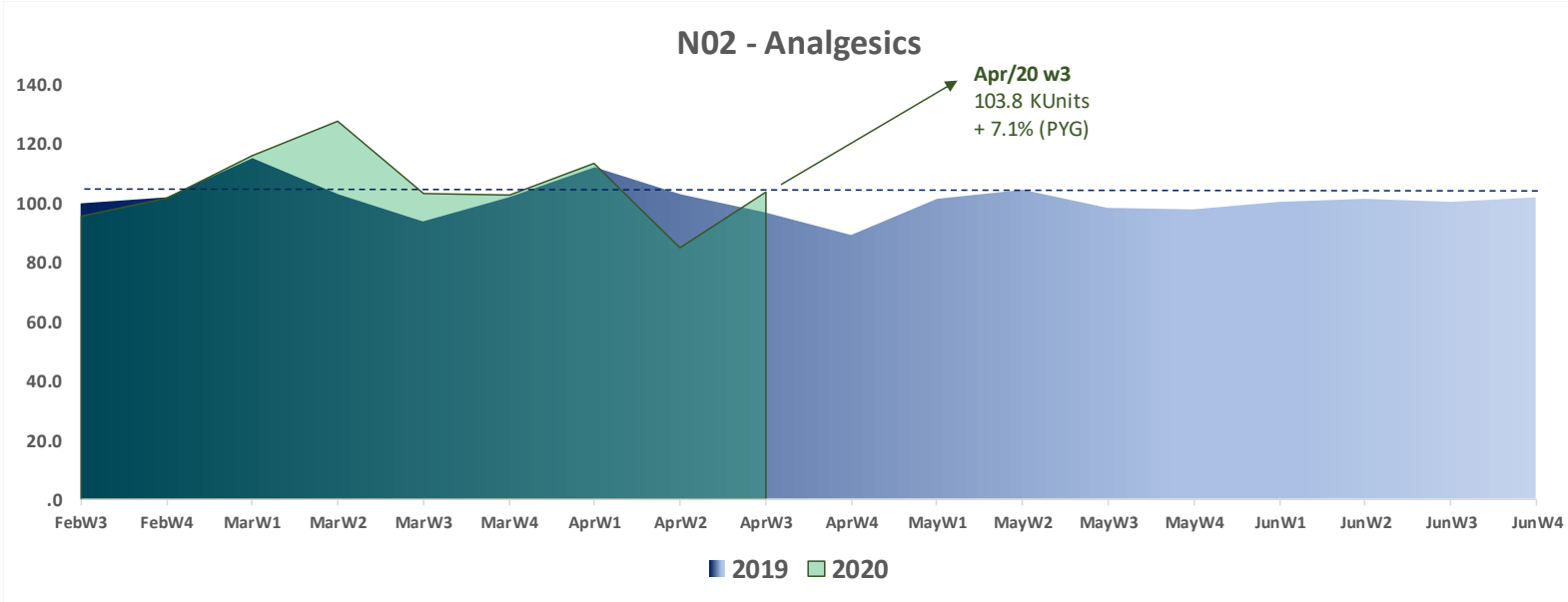
Prescription anti-inflammatory evolution, such as **Ibuprofen**, is reflecting the information from the media



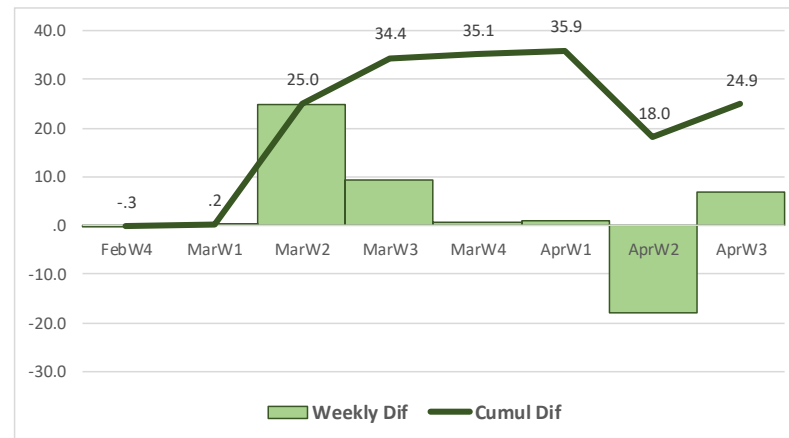
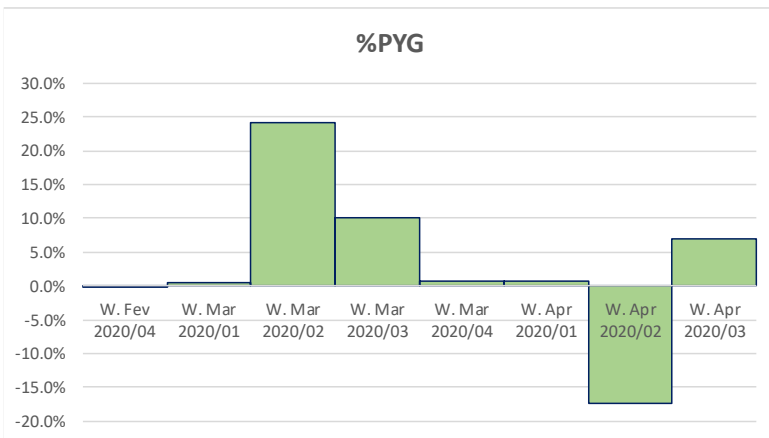
- ❖ Some reports, especially on social media, raised questions about whether non-steroidal anti-inflammatory medicines (NSAIDs) such as ibuprofen could worsen coronavirus disease (COVID-19)<sup>1</sup>.
- ❖ The French Health Minister has made a statement which recommends that paracetamol should be used and anti-inflammatory medication avoided in people with Covid-19 in France. This is based on French analysis and is not in line with the analysis and recommendations of the HSE and other EU countries<sup>1</sup>.
- ❖ HMR believes the performance showed by this market can have the influence of these previous statements. Due to the lack of evidence regarding the safety of the use of these medicines, there might be an increased concern on the prescribing.
- ❖ The data presented is representative of the community pharmacy dispensary market. Other presentations of anti-inflammatory medicines can also be sold in the OTC Market and thus are not included in this study.

<sup>1</sup><https://www.hse.ie/eng/services/news/media/pressrel/advice-about-anti-inflammatory-medication-and-covid-19.html>

# Prescription analgesics, such as paracetamol, are performing above the market

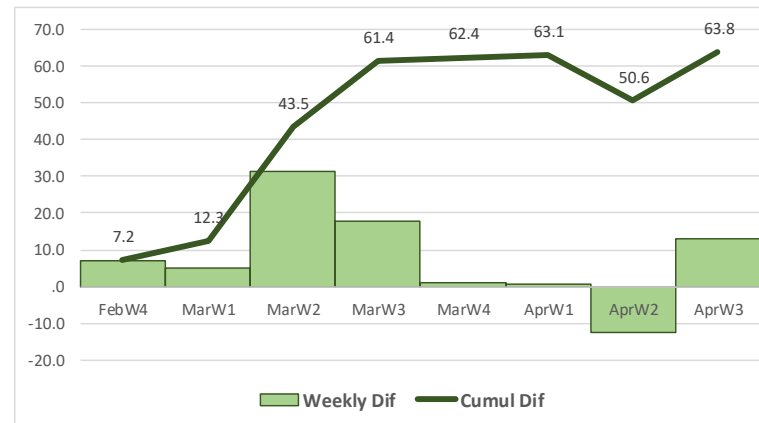
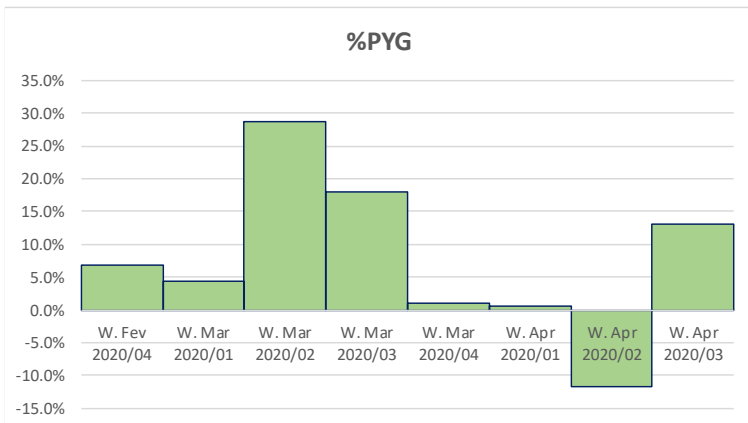
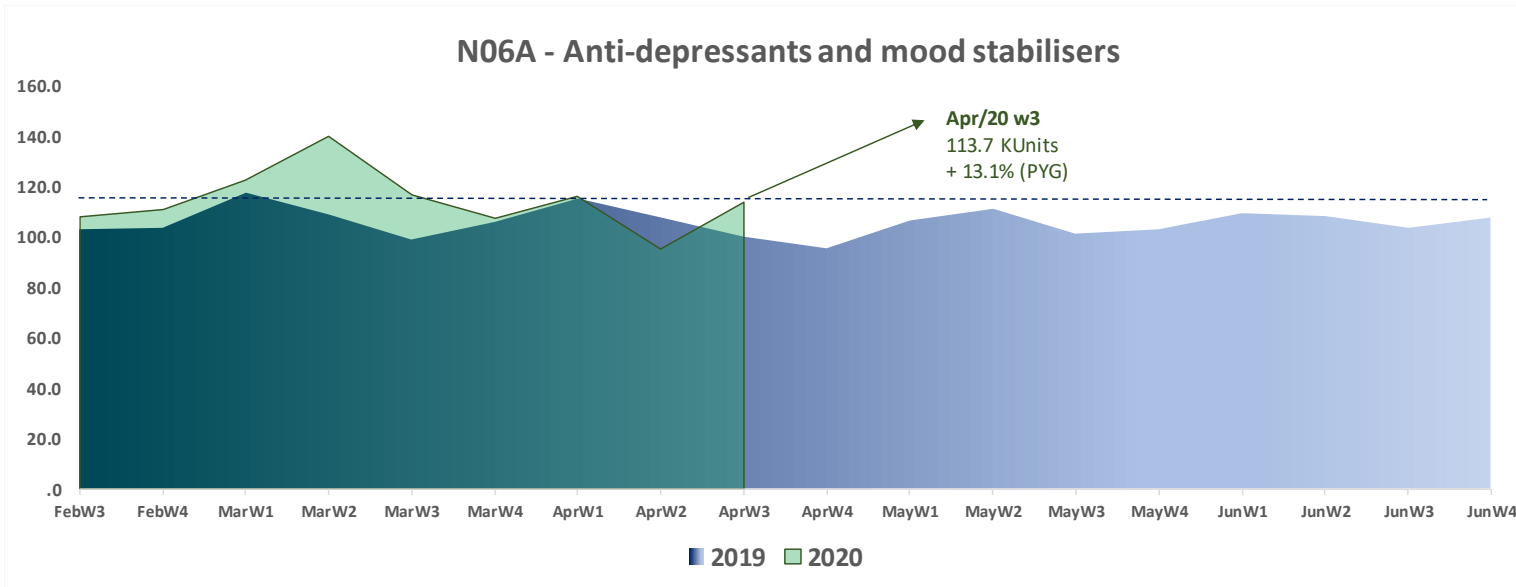


- ❖ Paracetamol remains the first choice for cases of fever and pain in COVID-19 patients.
- ❖ Recently, API Paracetamol exports from India have been compromised and have generated concerns about the supply of other APIs. This type of disruption can lead to manufacturing delays or stops ultimately leading to shortages.
- ❖ The data presented is representative of the community pharmacy dispensary market. Other presentations of anti-inflammatory medicines can also be sold in the OTC Market and thus are not included in this study.



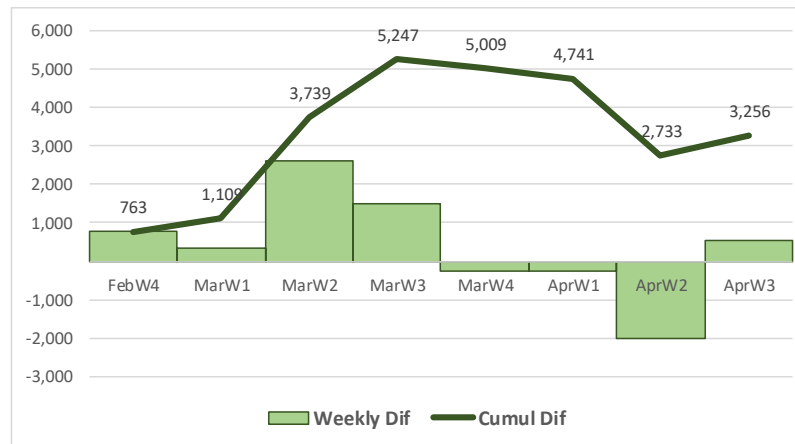
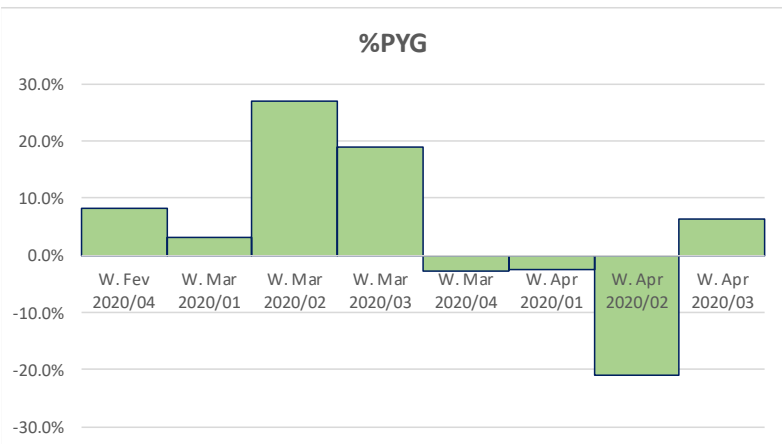
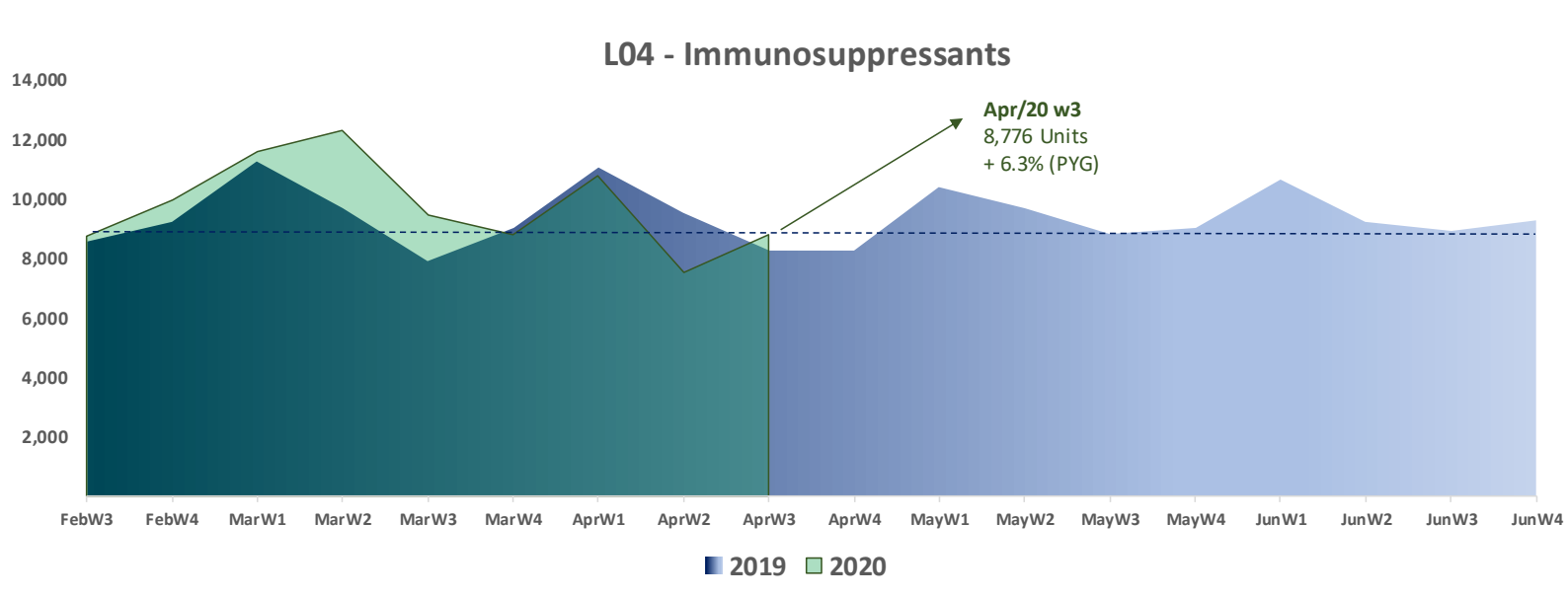


**Anti-depressants** and mood stabilisers are showing a cumulative increase in the COVID period of 7.4% with higher sales in 7 out of the 8 weeks



- ❖ Times of crisis usually generate increased levels of anxiety throughout the population changing its usage habits of anti-depressants and mood stabilizers.
- ❖ The separation and restriction of movement of people might be an unpleasant experience for those that undergo it. Separation from and loss of loved ones, the loss of freedom, uncertainty, financial loss and boredom can have psychological impact<sup>1</sup>.
- ❖ The cumulative balance in the COVID period shows a 7.4% increase in the units dispensed this year vs last year.

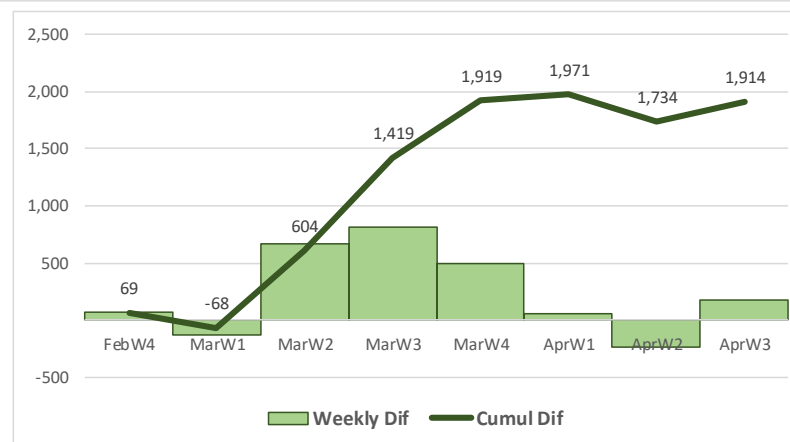
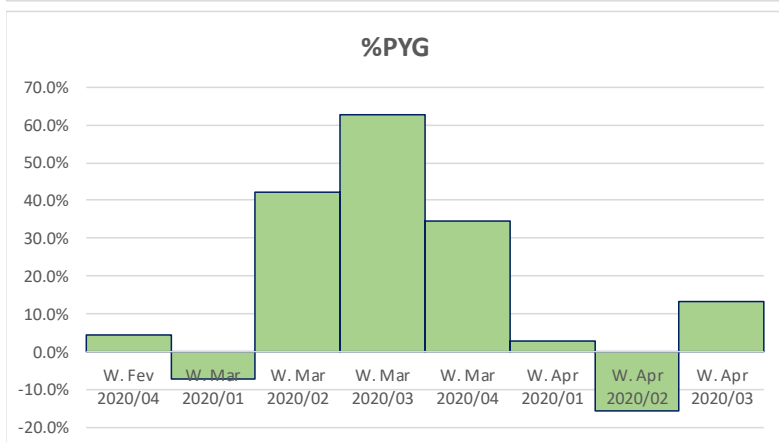
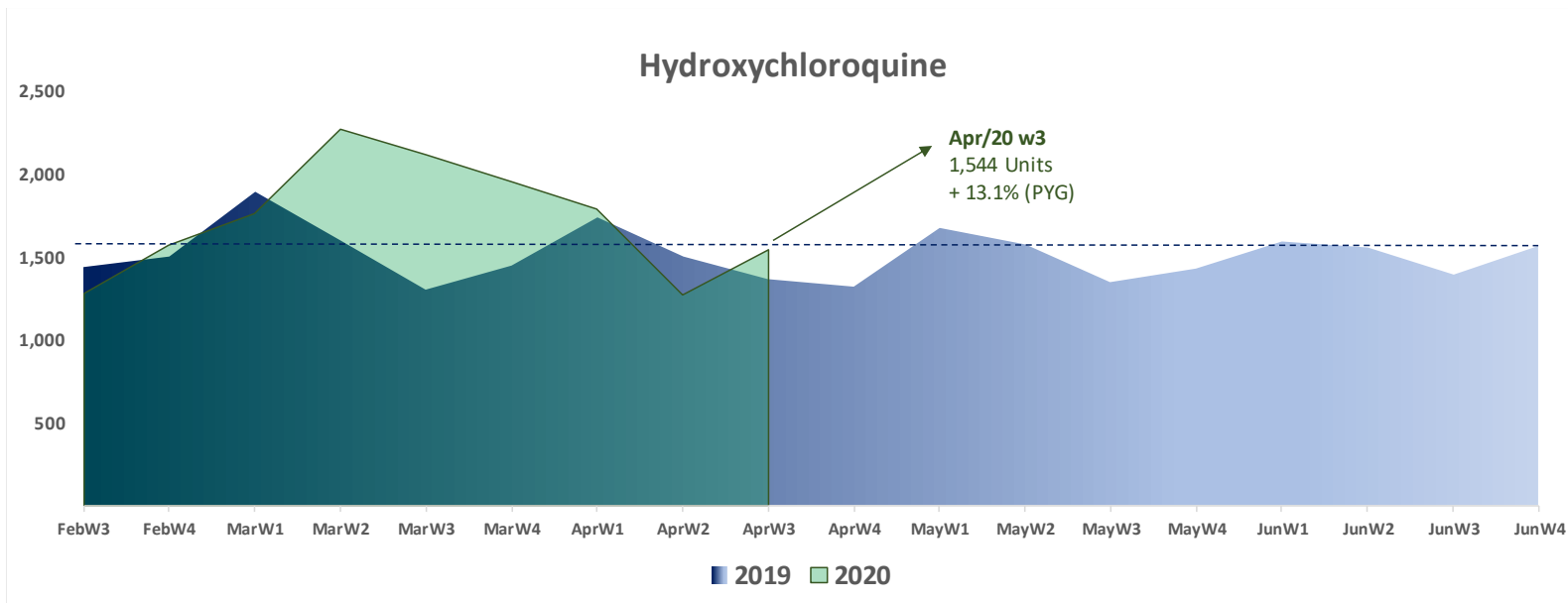
**Immunosuppressants** cumulative balance in the COVID period shows a 4.3% increase in the units dispensed this year vs last year.



- Due to the pandemic, many concerns have been raised worldwide regarding the fact that immunocompromised patients may be at higher risk of developing acute Respiratory Infection with SARS-CoV-2 (COVID-19)<sup>1,2</sup>.
- Immunomodulatory treatment leads to immunosuppression which may be sufficient to significantly increase the risk of infection<sup>2</sup>.
- These treatments are used to treat some auto-immune conditions such as inflammatory bowel disease, psoriasis and rheumatoid arthritis<sup>2</sup>.
- Immunosuppressants represent 14% of the market value.
- Arthritis Ireland’s recent publications stated that there is no evidence to date that being on an immunosuppressive treatment places the patient at higher risk of severe disease with Covid-19. However, as other infections can cause severe illness in these patients, extra care should be exercised<sup>3</sup>.
- The Irish Society for Rheumatology has published additional advice around cocooning to guide rheumatology patients who are on immunosuppressants and steroids<sup>3</sup>.

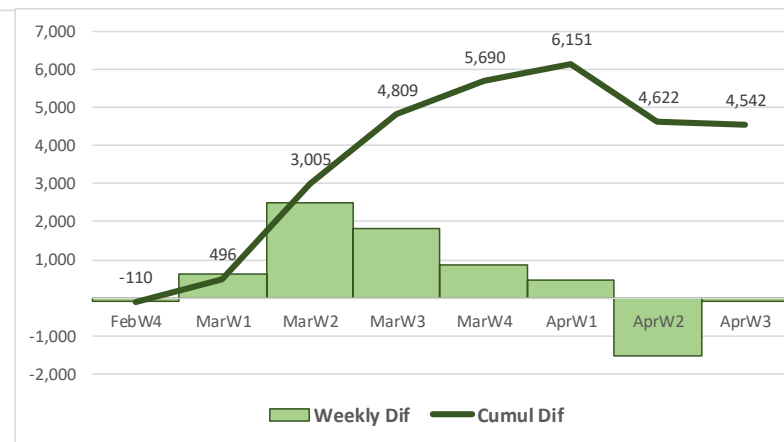
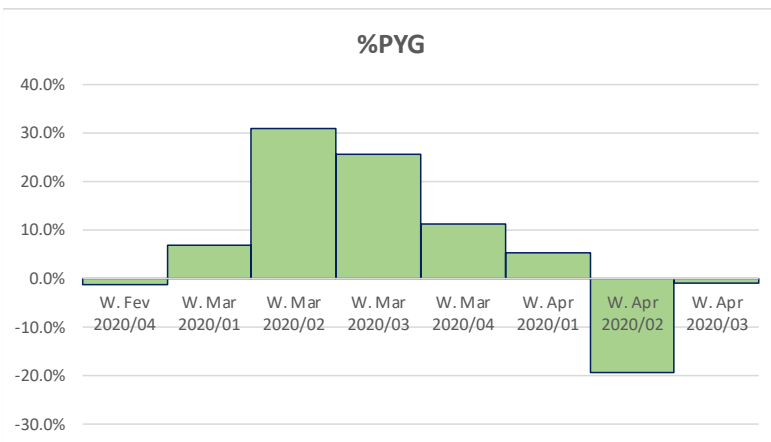
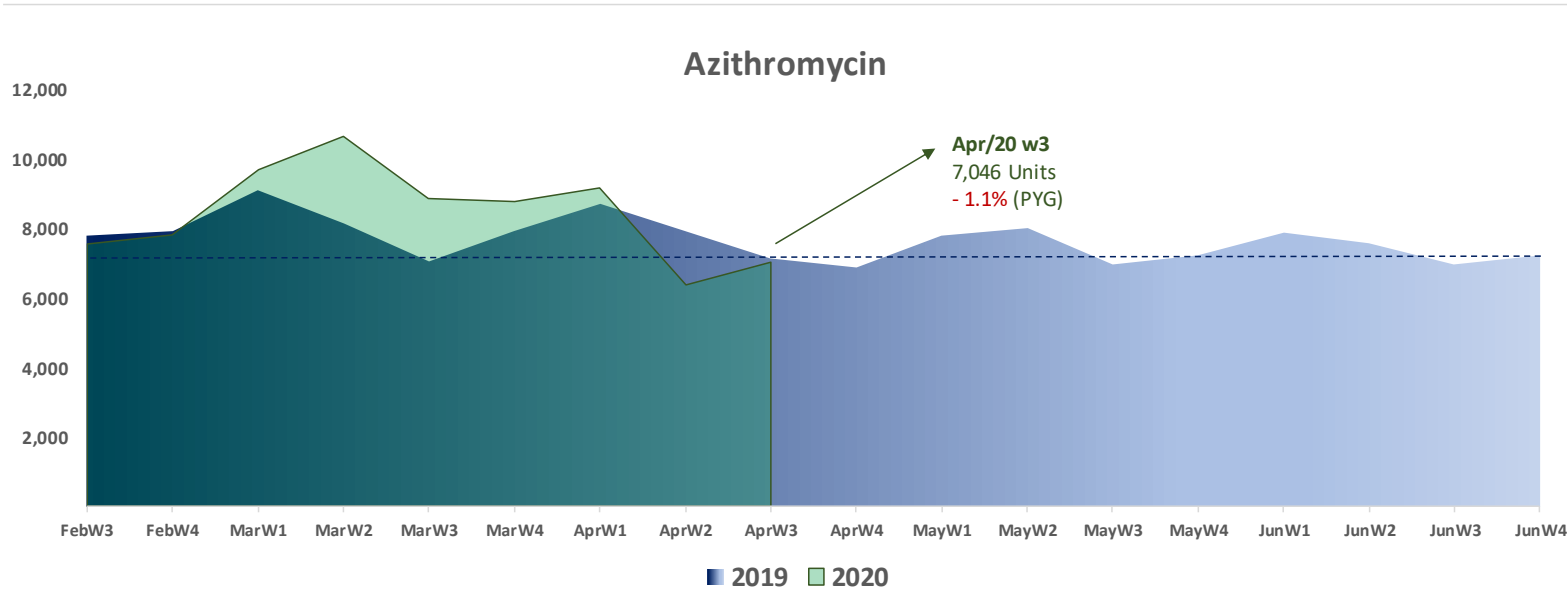
# COVID-19 Special Study | Associated therapeutics.

With significant units growth on the 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> week in March **Hydroxychloroquine** stabilised after the HSE recommendation



- ❖ Hydroxychloroquine (Plaquenil®) has been identified as having some antiviral activity against SARS-CoV-2<sup>1</sup>.
- ❖ On the 30th of March the HSE issued a communication to healthcare professionals stating that given the need to conserve national stocks and the fact that there is no evidence to support the prophylactic use of Hydroxychloroquine, this medicine should only be prescribed for hospital in-patients according to specific guidelines<sup>1</sup>.
- ❖ Hydroxychloroquine has also an important role in the on-going management of rheumatoid and lupus conditions of many individuals and stocks of this medicine are being managed in order to ensure that these patients continue to have access to their regular medication<sup>1</sup>.
- ❖ The national stock of hydroxychloroquine for COVID-19 positive patients is currently being directed to hospitals and the community stock is being preserved for existing rheumatoid and lupus patients<sup>1</sup>.

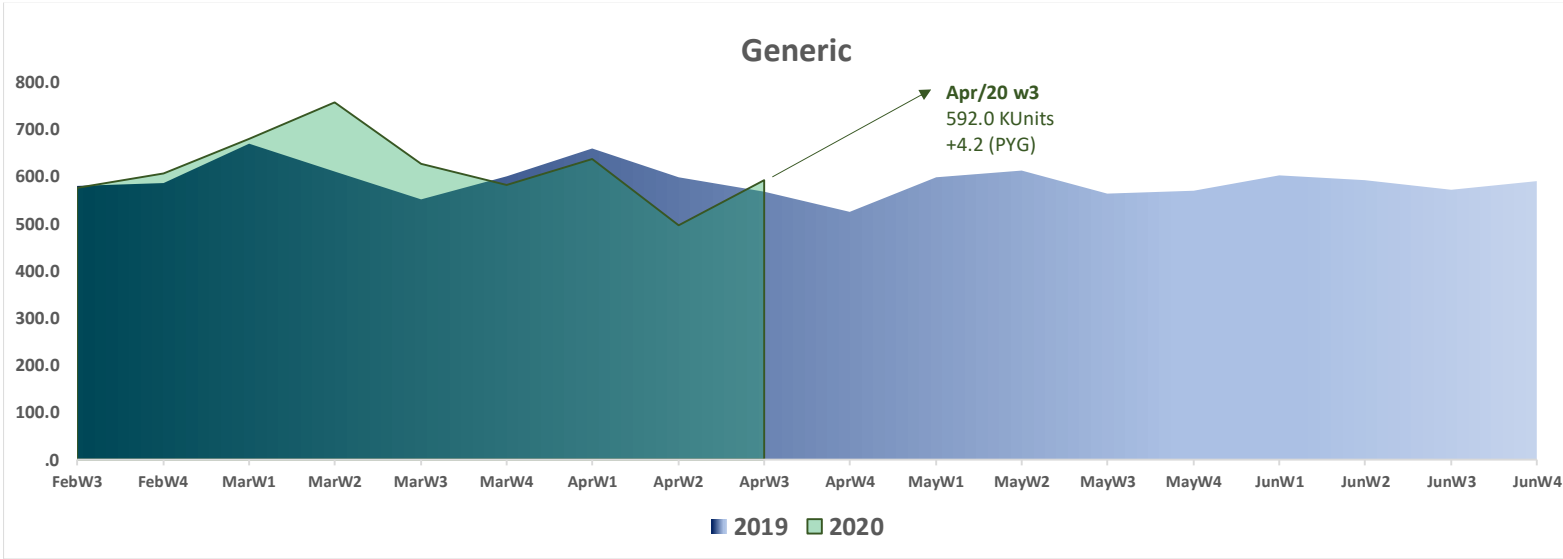
**Azithromycin** followed a similar pattern to hydroxychloroquine as this combination was reported as promising in the COVID-19 treatment



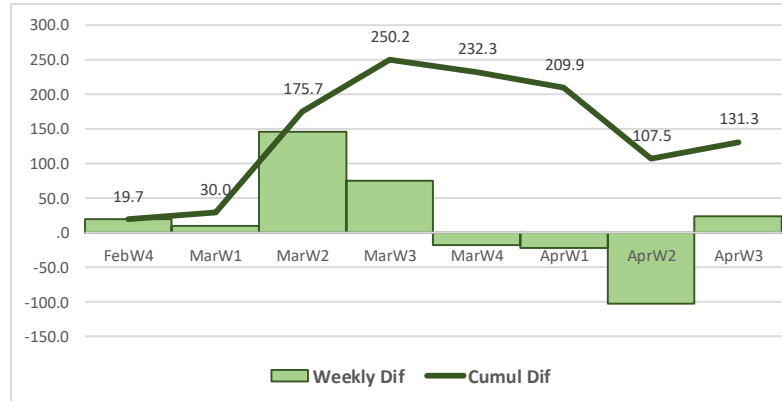
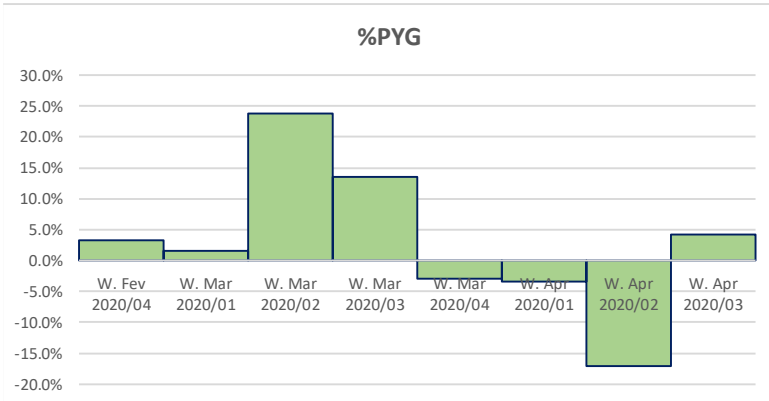
- ❖ Using azithromycin in combination with hydroxychloroquine was also reported as a promising method in the treatment associated with viral load reduction in COVID-19 patients<sup>1,2</sup>.
- ❖ The effect of Hydroxychloroquine might be reinforced by azithromycin<sup>2</sup>.
- ❖ On the 14th of April, further to the advice issued regarding the prescribing of hydroxychloroquine, the HSE has requested GPs that prescriptions of azithromycin should not be offered in the community for the management of patients with COVID-19<sup>3</sup>. Azithromycin should only be prescribed for hospital in-patients and according to specific guidance<sup>3</sup>. This guidance states that, at the time of writing, there was insufficient evidence to recommend systematic use of azithromycin and hydroxychloroquine in combination for the treatment of COVID-19<sup>3</sup>.

# COVID-19 Special Study | Generics and Geography.

# Generics are performing in alignment with the market



- ❖ Generics cumulative balance in the COVID period shows a 2.7% increase in the units dispensed this year vs last year.
- ❖ Meaning a 0.4pp above the market overall performance
- ❖ On the year to date, pre-COVID period, this market was 0.2pp above the previous year

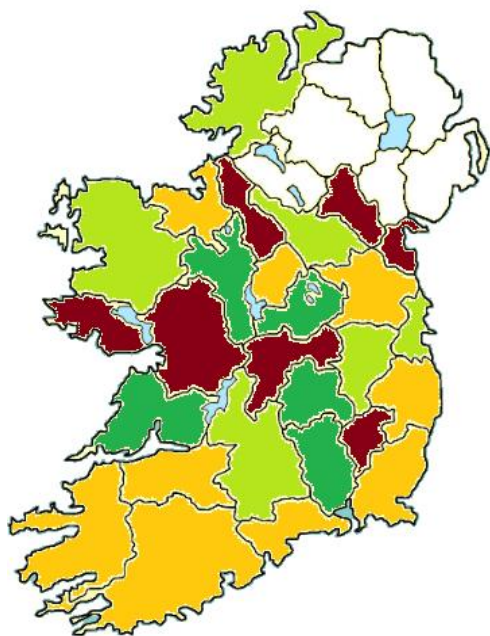


The full market cumulative balance in the COVID period **varies significantly across Counties.**

With Dublin and Roscommon taking the largest shares of the gains.

- ❖ The full market cumulative balance in the COVID period shows a 2.3% increase in the units dispensed this year vs last year.
- ❖ This evolution varies significantly across the different Counties.
- ❖ Roscommon leads the growth with 15.3%.
- ❖ Leitrim leads the decrease with -16.8%.
- ❖ The highest shares of the gains are taken by Dublin (33.5%) and Roscommon (9.4%).

## IE PRESCRIPTION MARKET



PREVIOUS YEAR GROWTH (Units)	
Feb/19 w4 - Apr/19 w3	
<b>vs</b>	
Feb/20 w4 - Apr/20 w3	
<b>%PYG (IRELAND) + 2.3%</b>	
	<b>PYG &gt;= + 4.6%</b>
	+ 2.3% <= <b>PYG</b> < + 4.6%
	0% <= <b>PYG</b> < + 2.3%
	<b>PYG &lt; 0%</b>
<b>MAX</b>	<b>ROSCOMMON (+ 15,3%)</b>
<b>MIN</b>	<b>LEITRIM ( - 16.8%)</b>

Rank	Counties	%PYG
1	Roscommon	15.3%
2	Kilkenny	7.8%
3	Westmeath	7.6%
4	Clare	7.2%
5	Laois	6.5%
...		
22	Offaly	-0.5%
23	Galway	-0.6%
24	Monaghan	-2.3%
25	Carlow	-5.8%
26	Leitrim	-16.8%

Rank	Counties	% Gains	%MS (2019)	%MS (2020)
1	Dublin	33.5%	27.0%	27.1%
2	Roscommon	9.4%	1.4%	1.6%
3	Westmeath	7.9%	2.3%	2.5%
4	Kildare	7.6%	3.8%	3.9%
5	Cork	7.4%	11.5%	11.4%





**Knowledge** for better health

Any questions related to GDPR compliance or data protection please email [privacy@hmr.co.com](mailto:privacy@hmr.co.com).

To learn more about how we comply with GDPR and, as a result, care for the security and privacy of personal data we collected from our clients, visit <http://www.hmr.co.com/Privacy-Policy>.

# We believe in the power of **Knowledge.**

In depth knowledge of the market is the first step to delivering unique market insights. Such information takes us further and gives more meaning to all the data and numbers thereby enabling efficient analysis of the market.

**Because we believe that the power of  
knowledge grows when it is shared.  
And can change lives.**

**Thank you**

