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

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

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
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 prescription market shows a cumulative growth of 2.3% and seems to be stabilising, after an upper peak in the 2nd week of March and a lower peak in the 2nd week of April.
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 2nd week of March.
Salbutamol is a short acting β2 receptor agonist used to relieve symptoms of Asthma and COPD such as coughing, wheezing and feeling breathless. It works by relaxing the muscles of the airways into the lungs, making it easier to breathe.

Salbutamol inhalers are called ‘relievers’ because they provide the patient a quick relief from breathing problems.

Salbutamol is available as an inhaler, nebulers or in tablets, capsules or syrup for those who are not able to use an inhaler.

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.
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 year’s performance with the slight increase occurred in March being compensated in April.
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.

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

**Contraceptives** G03 class products have been decreasing and the cumulative balance is now -11.6%.
The emergency contraceptives were having slightly more sales than last year but that changed from 3rd 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 3rd week in March.

The cumulative balance in the COVID period shows a 30.7% decrease in the units dispensed this year vs last year.
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)\(^1\).

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\(^1\).

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.
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.

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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 impact1.

The cumulative balance in the COVID period shows a 7.4% 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)\(^1,2\).

Immunomodulatory treatment leads to immunosuppression which may be sufficient to significantly increase the risk of infection\(^2\).

These treatments are used to treat some autoimmune conditions such as inflammatory bowel disease, psoriasis and rheumatoid arthritis\(^2\).

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\(^3\).

The Irish Society for Rheumatology has published additional advice around cocooning to guide rheumatology patients who are on immunosuppressants and steroids\(^3\).

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**Immunosuppressants** cumulative balance in the COVID period shows a 4.3% increase in the units dispensed this year vs last year.
Hydroxychloroquine (Plaquenil®) has been identified as having some antiviral activity against SARS-CoV-2\(^1\).

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\(^1\).

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\(^1\).

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\(^1\).

\(^1\) https://www.hse.ie/eng/staff/pcrs/circulars/gp-circular-13-20-hydroxychloroquine.pdf
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\(^1\,\,^2\).

The effect of Hydroxychloroquine might be reinforced by azithromycin\(^2\).

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\(^3\). Azithromycin should only be prescribed for hospital in-patients and according to specific guidance\(^3\). 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\(^3\).

2. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7102549/
COVID-19 Special Study | Generics and Geography.
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%).
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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.
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