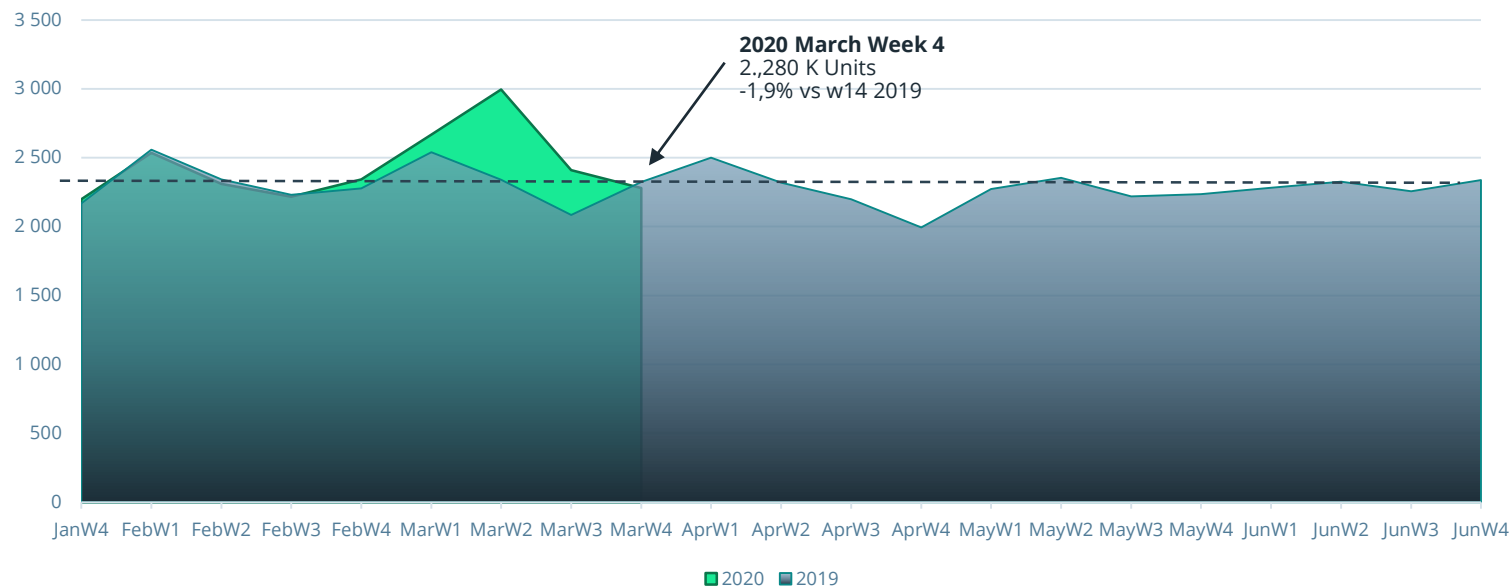


Coronavirus Weekly Special



IE Full Prescription Market

4th Week of January – 4th Week of June, 2019 vs 2020
(K Units)



% Previous Year Growth	Week 1 March/20	Week 2 March/20	Week 3 March/20	Week 4 March/20
Irish Prescription Market	+5,0%	+27,9%	+15,5%	-1,9%

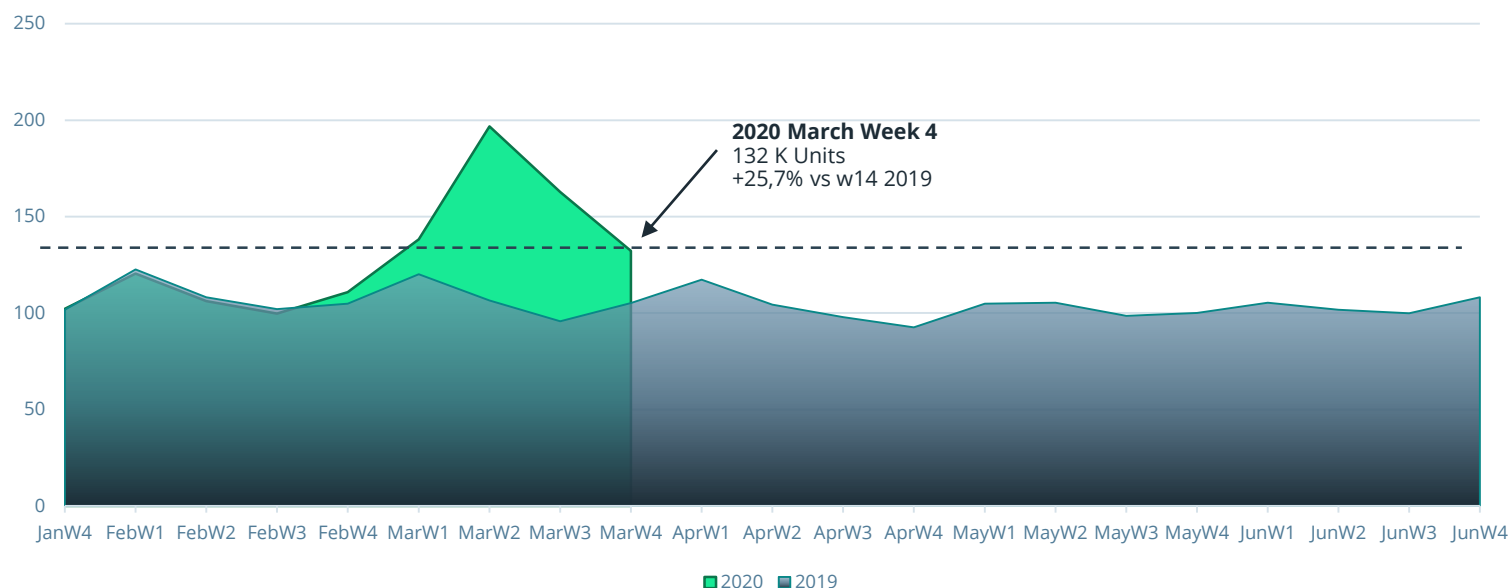
- Due to the extensive impact of the SARS-CoV-2 virus (COVID-19) pandemic, HMR developed an analysis of the weekly market evolution to understand a possible change in consumer behaviour at the pharmacy level in Ireland.
- In January and February the dispensary market and its main therapeutic classes have experienced weekly sales with very similar trends to the homologous weeks of 2019.
- This scenario started to change at the end of February ramping to a 4.7% growth in the first week of March, peaking in the second week of March with a growth of 28.1% and showing a growth of 15.4% in the third week, when compared to the exact same weeks of March 2019.
- In the 4th week of March the market has decreased by 1.9% vs last year, showing a possible supply normalisation of the market when compared to the initial weeks of March.
- The main cause of this evolution is obviously related to the impact of CV19.
- In the following slides we will analyse some of the most impacted therapeutic classes.

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Respiratory Market – R03 Anti-asthma and COPD products

4th Week of January – 4th Week of June, 2019 vs 2020
(K Units)



% Previous Year Growth	Week 1 March/20	Week 2 March/20	Week 3 March/20	Week 4 March/20
R03 – Anti-asthma and COPD products	+15,0%	+84,7%	+70,1%	25,7%

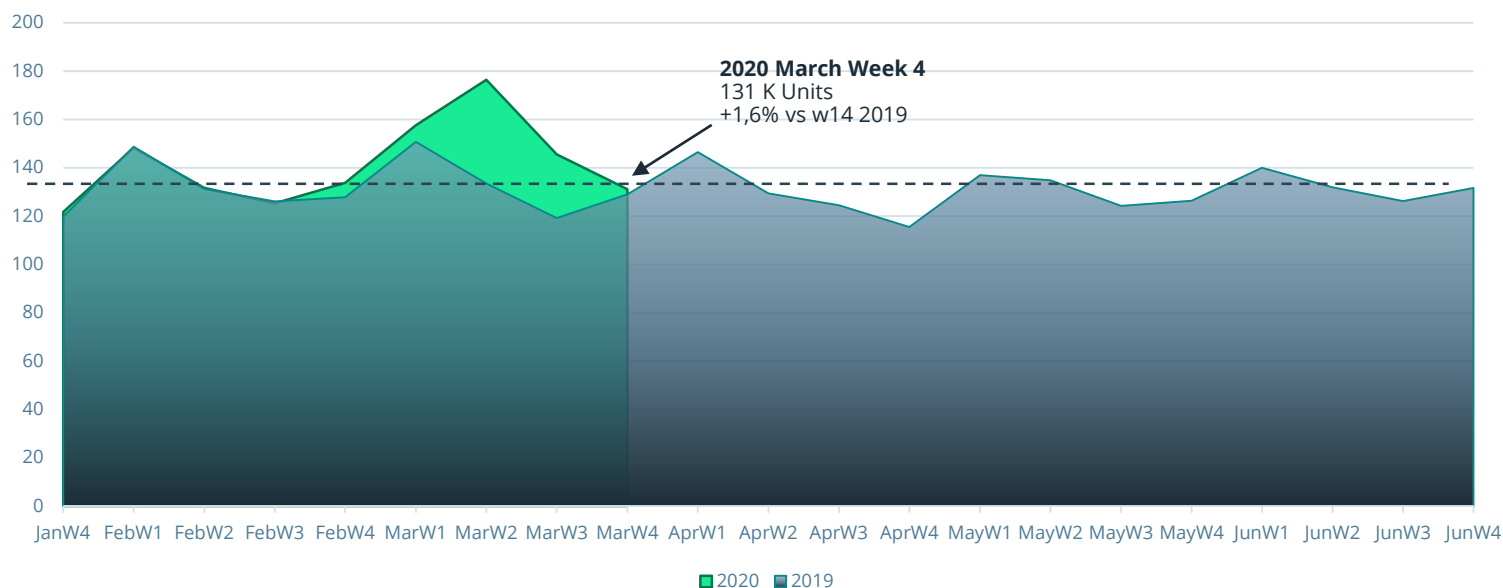
- In the Respiratory market the therapeutic area with the highest growth was the R03 ATC Class.
- For the products in this class the changing scenario started to ramp up with a 14.8% growth in the first week of March, peaking in the second week of March with a growth of 84.8% and showing a growth of 70.1% in the third week, when compared to the exact same weeks of March 2019.
- In the 4th week of March this market continues to increase at 25.7% vs last year, but continuing to show a decreasing trend since the peak of 2nd week of March possibly indicating that the market might be approaching normalisation.
- Among the three ATC2 classes analysed, from Respiratory, Nervous System and Cardiovascular the class that peaked the highest in this period was the R03 - Anti-asthma and COPD products.

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Cardiovascular Market – C10 Lipid-regulating/anti-atheroma preparations

4th Week of January – 4th Week of June, 2019 vs 2020
(K Units)



- In the Cardiovascular market the therapeutic area with the highest growth was the C10 ATC Class.
- For the products in this class the changing scenario started to ramp up with a 4.0% growth in the first week of March, peaking in the second week of March with a growth of 32.0% and showing a growth of 21.8% in the third week, when compared to the exact same weeks of March 2019.
- In the 4th week of March this market is on a slight increase of 1.6% vs last year, quickly approaching last year values since the peak of the 2nd week in March.

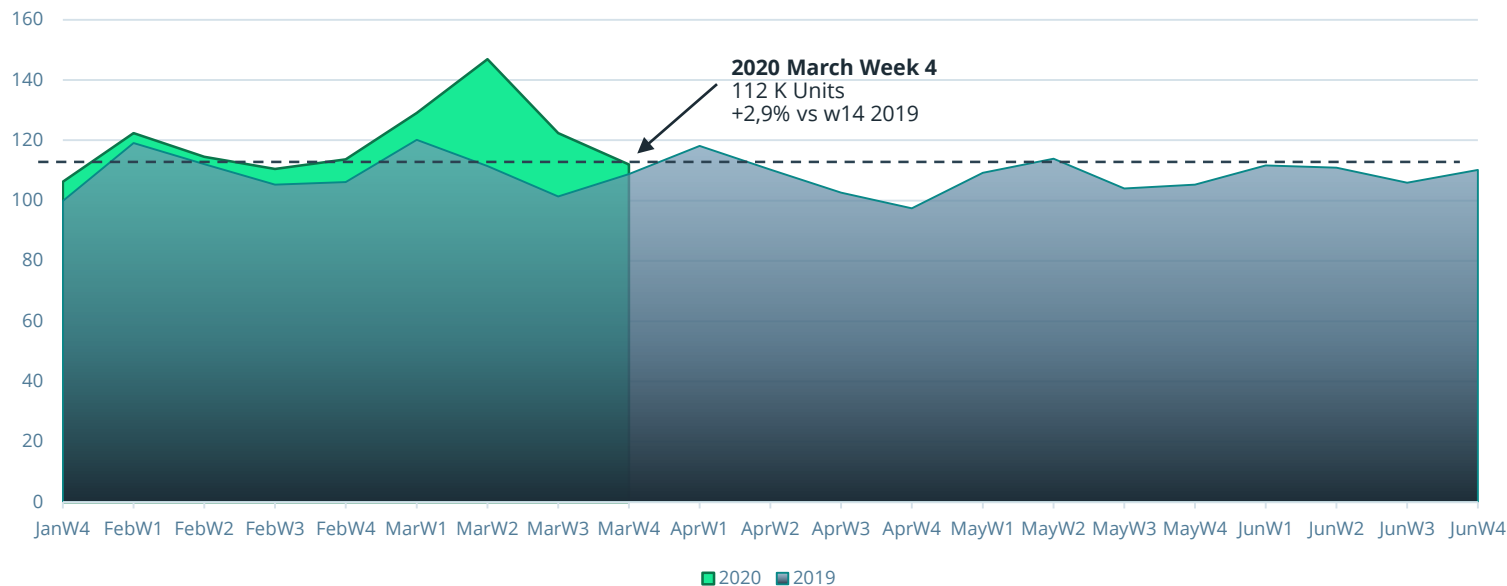
% Previous Year Growth	Week 1 March/20	Week 2 March/20	Week 3 March/20	Week 4 March/20
C10 Lipid-regulating/anti-atheroma preparations	+4,6%	+32,2%	+22,1%	+1,6%

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Nervous System Market – N06 Psych analeptics excluding anti-obesity preparations

4th Week of January – 4th Week of June 2019 vs 2020
(K Units)



% Previous Year Growth	Week 1 March/20	Week 2 March/20	Week 3 March/20	Week 4 March/20
N06 – Psych analeptics excluding anti-obesity preparations	+7,4%	+31,9%	+20,7%	+2,9%

- In the Nervous System market the therapeutic area with the highest growth was the N06 ATC Class.
- For the products in this class the changing scenario started to ramp up with a 7.2% growth in the first week of March, peaking in the second week of March with a growth of 32.1% and showing a growth of 20.7% in the third week, when compared to the exact same weeks of March 2019.
- In the 4th week of March this market is on a slight increase of 2.9% vs last year, starting to approach last years values since the peak of the 2nd week in March.
- At HMR we believe that the power of knowledge grows when it is shared. And can change lives!

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

