

# Prescription Market Trends

Pharmacy channel (Ireland)

November 2020



# MAIN MARKET TRENDS

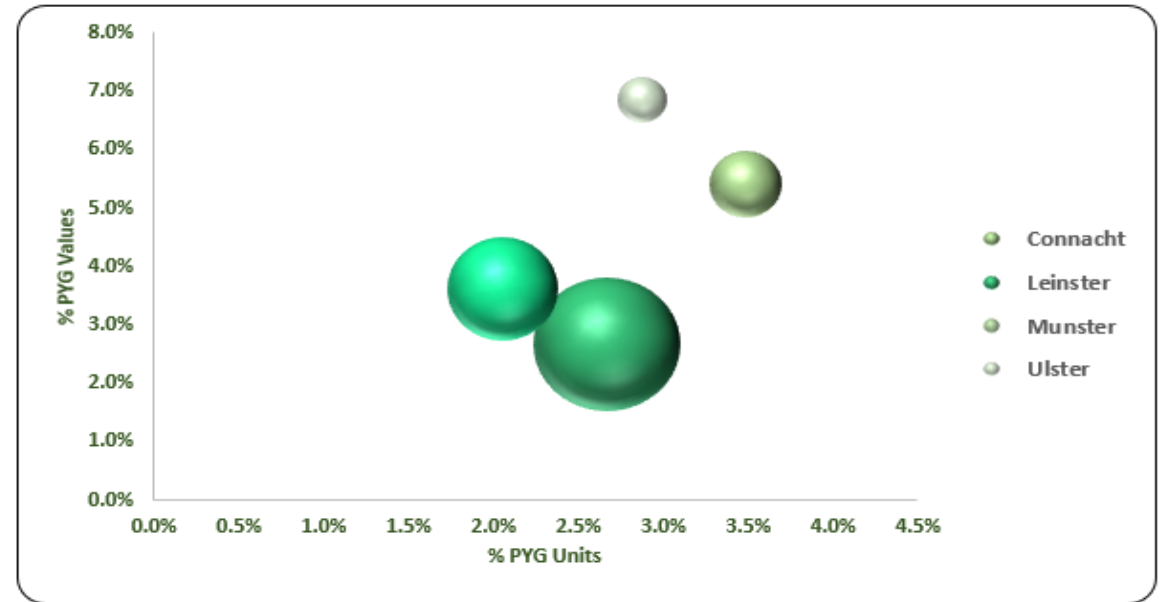
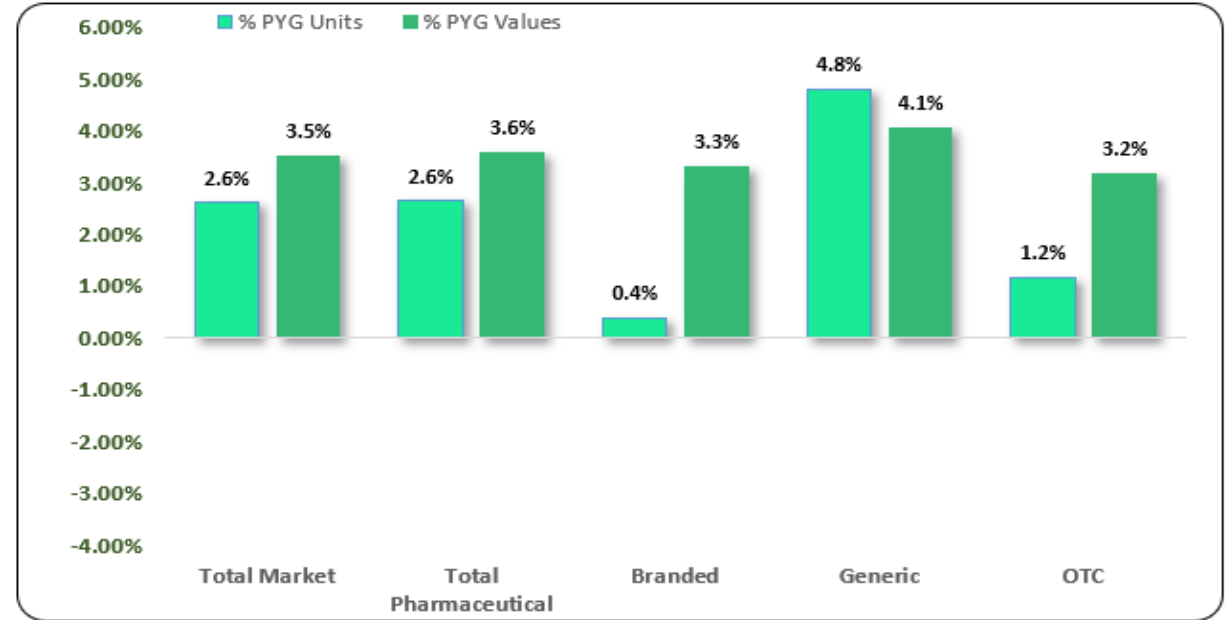
November 2020 MAT VS November 2019 MAT

The **Irish Prescription** market, in the last MAT, grew 3.5% in value and 2.6% in units.

The main driver of the value growth are the innovative brands at 3.3%. Generic sees an increase of 4.1%, while the OTC sees an increase in value of 3.2%.

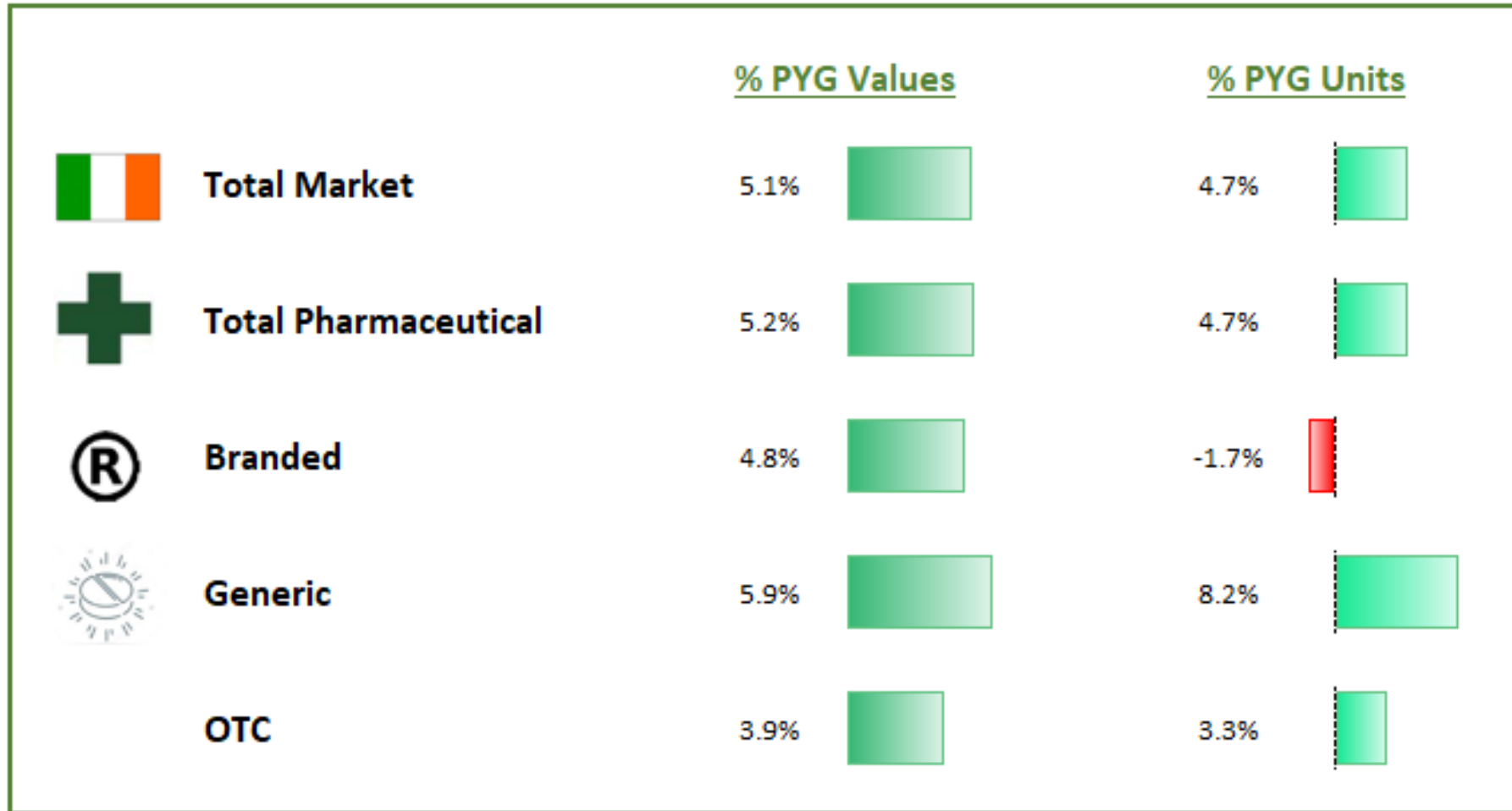
In units Generic medicines had an increase of 4.8%, Branded of 0.4% and OTCs of 1.2%.

In November Connacht has the highest PYG for Units and Ulster for Values.



# MARKET SEGMENT TRENDS

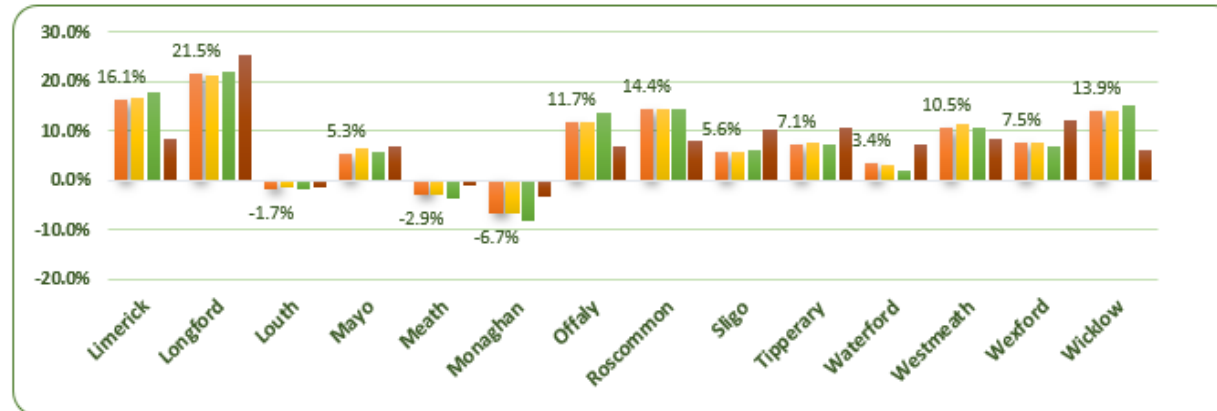
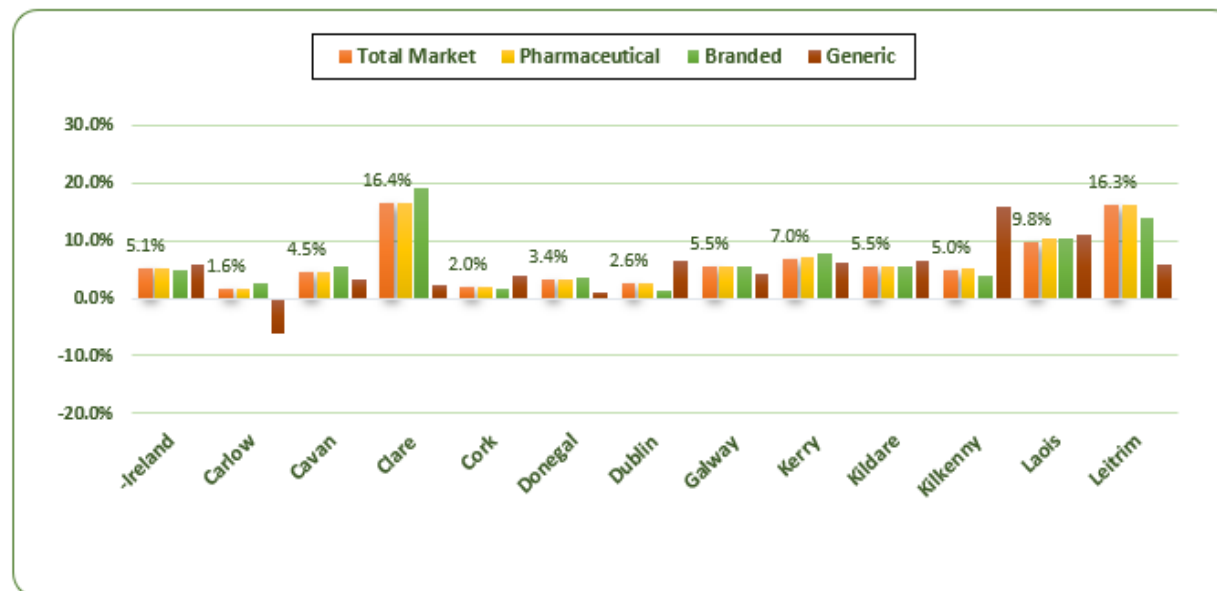
November 2020 VS November 2019



# COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

November 2020 VALUE VS November 2019 VALUE

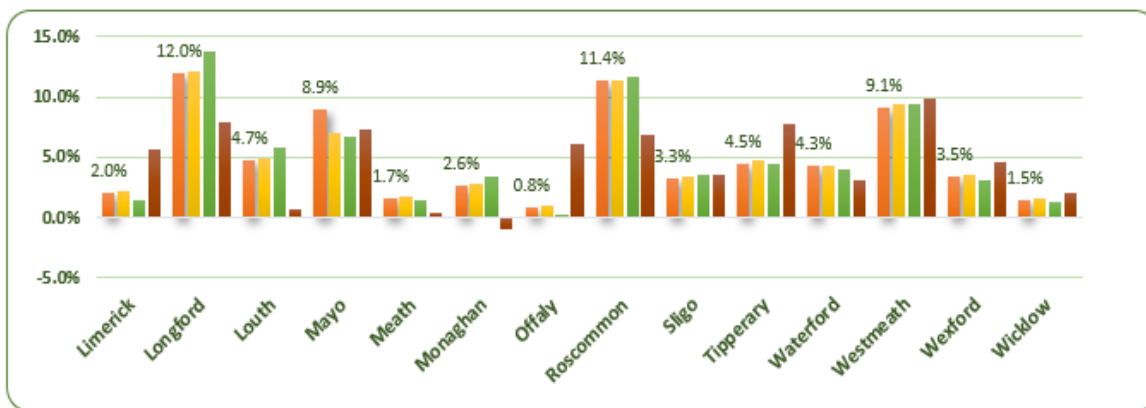
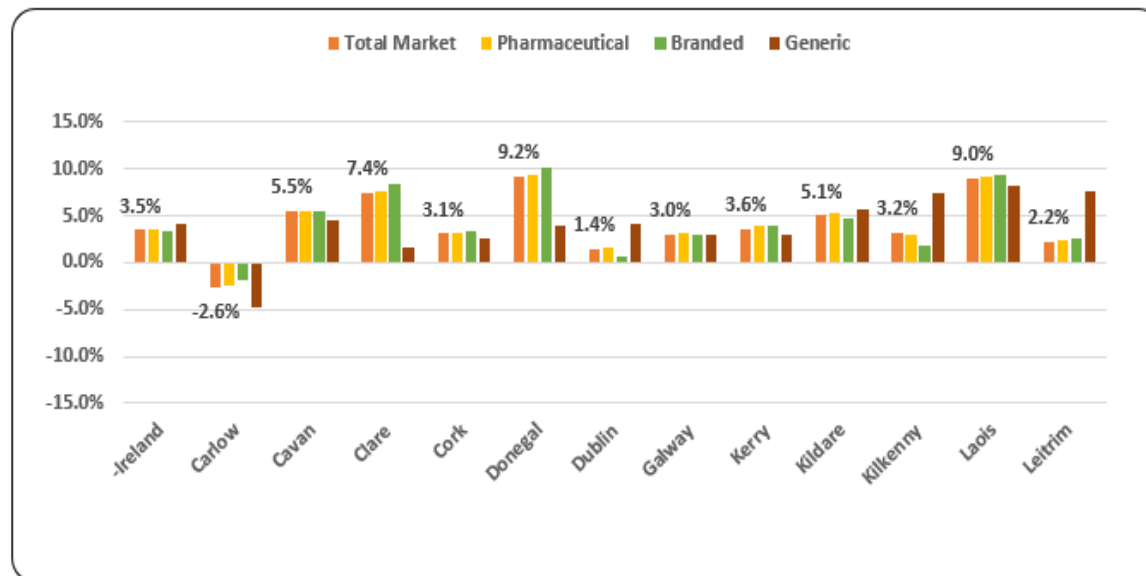
County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	5.1%	5.2%	4.8%	5.9%
Carlow	1.6%	1.7%	2.6%	-6.0%
Cavan	4.5%	4.6%	5.4%	3.1%
Clare	16.4%	16.4%	19.2%	2.2%
Cork	2.0%	2.1%	1.6%	4.1%
Donegal	3.4%	3.4%	3.6%	1.1%
Dublin	2.6%	2.6%	1.2%	6.4%
Galway	5.5%	5.5%	5.6%	4.1%
Kerry	7.0%	7.1%	7.7%	6.3%
Kildare	5.5%	5.6%	5.5%	6.4%
Kilkenny	5.0%	5.3%	4.0%	15.9%
Laois	9.8%	10.4%	10.5%	10.9%
Leitrim	16.3%	16.3%	14.1%	5.8%
Limerick	16.1%	16.6%	17.9%	8.6%
Longford	21.5%	21.3%	21.9%	25.3%
Louth	-1.7%	-1.6%	-1.9%	-1.3%
Mayo	5.3%	6.5%	5.7%	7.0%
Meath	-2.9%	-2.9%	-3.8%	-0.9%
Monaghan	-6.7%	-6.8%	-8.1%	-3.5%
Offaly	11.7%	11.9%	13.7%	7.0%
Roscommon	14.4%	14.4%	14.5%	7.9%
Sligo	5.6%	5.8%	6.2%	10.1%
Tipperary	7.1%	7.5%	7.3%	10.6%
Waterford	3.4%	3.1%	2.0%	7.2%
Westmeath	10.5%	11.2%	10.5%	8.3%
Wexford	7.5%	7.6%	6.8%	12.2%
Wicklow	13.9%	14.1%	15.3%	6.2%



# COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

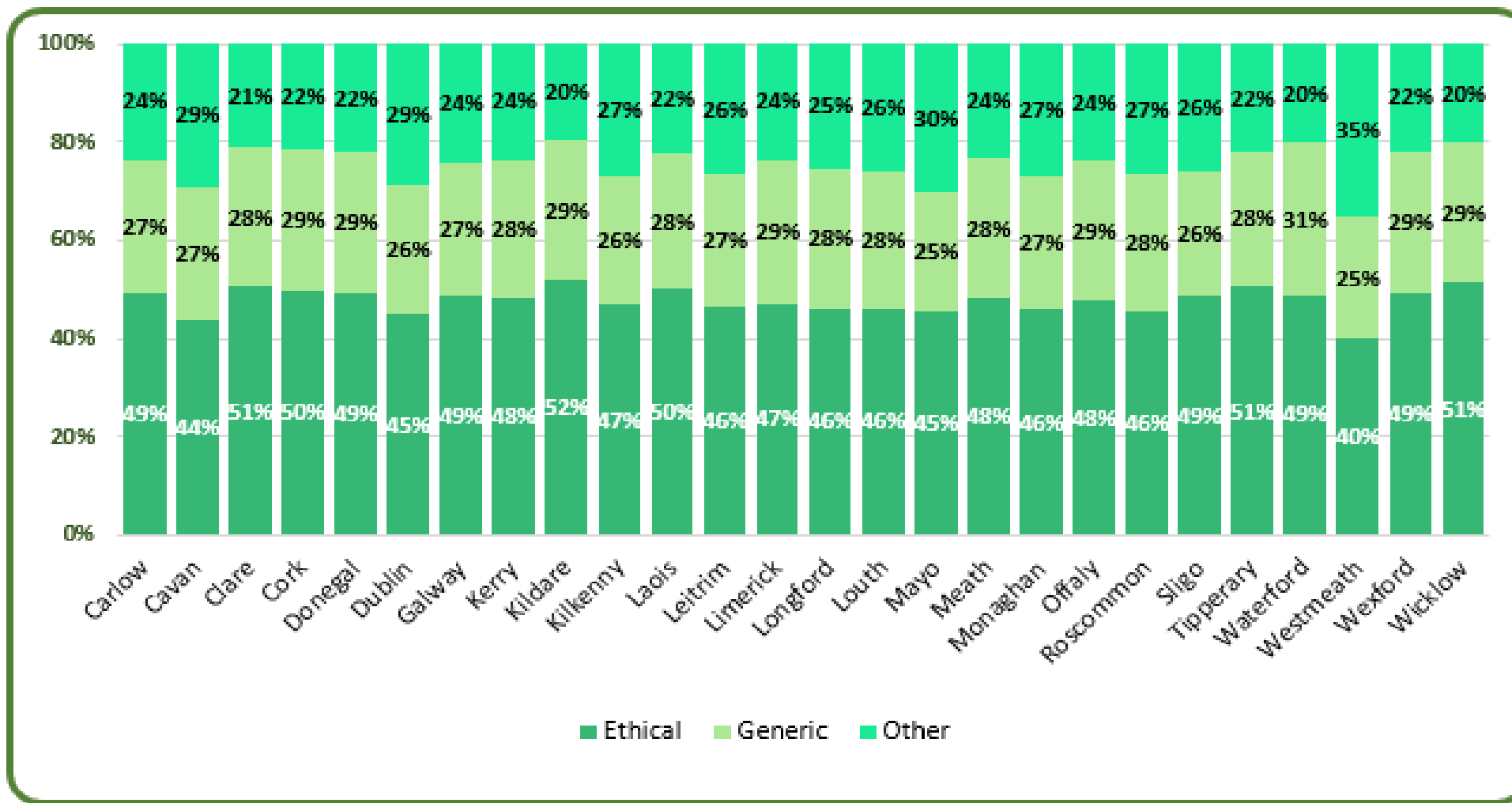
## November 2020 MAT VALUE VS November MAT VALUE

County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	3.5%	3.6%	3.3%	4.1%
Carlow	-2.6%	-2.4%	-1.9%	-4.7%
Cavan	5.5%	5.5%	5.5%	4.5%
Clare	7.4%	7.6%	8.4%	1.7%
Cork	3.1%	3.2%	3.3%	2.6%
Donegal	9.2%	9.3%	10.2%	4.0%
Dublin	1.4%	1.6%	0.7%	4.2%
Galway	3.0%	3.1%	3.1%	2.9%
Kerry	3.6%	3.9%	4.0%	3.0%
Kildare	5.1%	5.2%	4.7%	5.7%
Kilkenny	3.2%	3.0%	1.9%	7.4%
Laois	9.0%	9.3%	9.4%	8.1%
Leitrim	2.2%	2.4%	2.6%	7.5%
Limerick	2.0%	2.3%	1.5%	5.7%
Longford	12.0%	12.2%	13.8%	7.9%
Louth	4.7%	4.9%	5.8%	0.7%
Mayo	8.9%	7.0%	6.8%	7.3%
Meath	1.7%	1.7%	1.4%	0.4%
Monaghan	2.6%	2.7%	3.4%	-1.0%
Offaly	0.8%	1.0%	0.2%	6.1%
Roscommon	11.4%	11.4%	11.6%	6.8%
Sligo	3.3%	3.4%	3.6%	3.6%
Tipperary	4.5%	4.8%	4.5%	7.8%
Waterford	4.3%	4.3%	4.1%	3.2%
Westmeath	9.1%	9.4%	9.5%	9.9%
Wexford	3.5%	3.6%	3.1%	4.6%
Wicklow	1.5%	1.6%	1.2%	2.1%



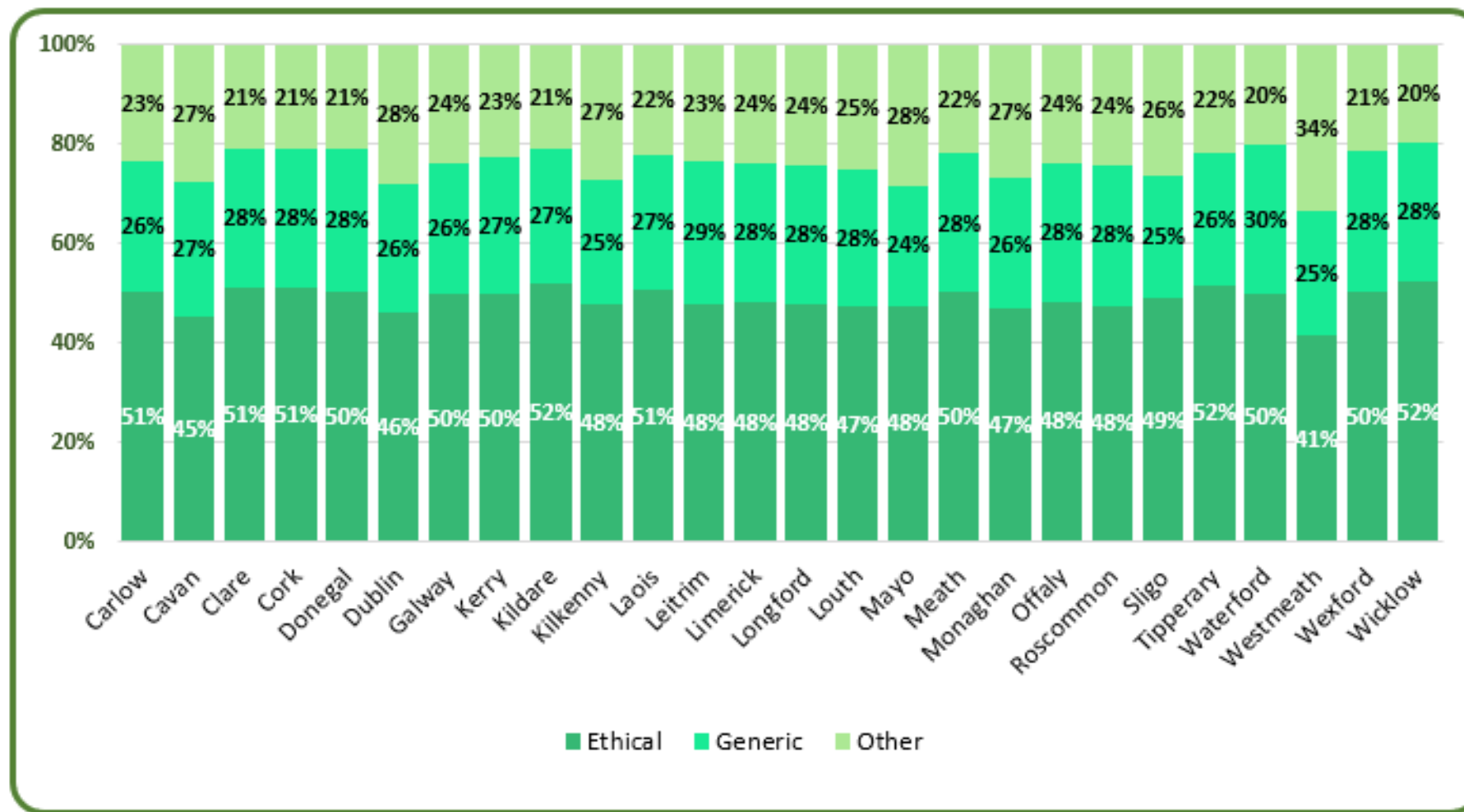
# MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN November 2020



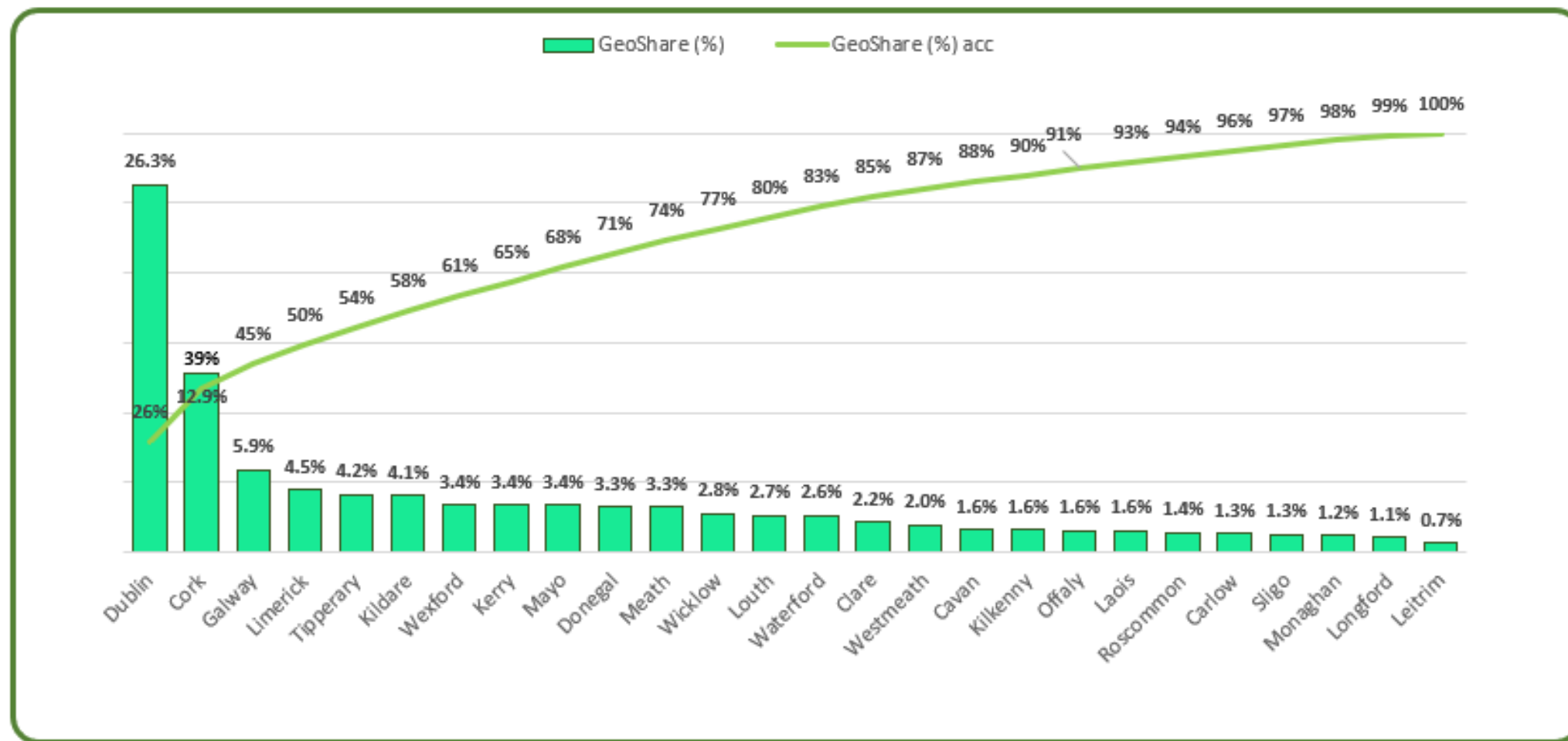
# MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN November 2020 MAT



# GEOGRAPHICAL SHARE BY COUNTY

November 2020 MAT VALUE





# MANUFACTURER ANALYSIS

## TOTAL MARKET

Rank	Manufacturer	Values						Units					
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	<b>Total</b>	5%		4%			5%		3%				
1	+ Vertex Pharma UK	44%	8%	8%	6%		48%	0%	12%	0%			
2	+ Janssen-Cilag	10%	6%	11%	6%		-9%	1%	-14%	1%			
3	+ Novartis	-1%	6%	4%	6%		-2%	1%	-3%	1%			
4	+ Pfizer AG	-27%	4%	-21%	5%		-8%	2%	-3%	2%			
5	+ Teva Pharma Ind	-4%	4%	-2%	4%		-5%	9%	0%	9%			
6	+ Abbvie	-37%	3%	-32%	4%		-39%	0%	-31%	0%			
7	+ GlaxoSmithKline IE	-5%	4%	3%	4%		-10%	4%	-3%	4%			
8	+ Amgen	37%	4%	33%	4%		16%	0%	18%	0%			
9	+ Celgene EU	0%	3%	11%	3%		0%	0%	7%	0%			
10	+ MSD	-11%	2%	-14%	3%		1%	1%	-1%	1%			
11	+ Bristol-Myers Squibb	21%	2%	19%	2%		19%	1%	20%	0%			
12	+ AstraZeneca Pharma	15%	2%	11%	2%		9%	1%	5%	1%			
13	+ Biogen Idec	59%	3%	106%	2%		61%	0%	113%	0%			
14	+ Novo Nordisk	5%	2%	9%	2%		2%	1%	4%	1%			
15	+ Mylan	22%	2%	10%	2%		-2%	4%	-1%	4%			
16	+ Accord HC	20%	2%	20%	2%		22%	8%	15%	7%			
17	+ Roche	7%	2%	7%	2%		3%	0%	5%	0%			
18	+ Clonmel HC	9%	2%	2%	2%		10%	8%	1%	8%			
19	+ Boehringer Ingelheim	5%	2%	6%	2%		4%	1%	5%	1%			
20	+ Bayer AG	-14%	2%	-7%	2%		-18%	1%	-7%	1%			
21	+ Sanofi	4%	2%	3%	2%		10%	4%	10%	3%			
22	+ Astellas	2%	2%	4%	2%		2%	0%	0%	0%			
23	+ Takeda IE	18%	1%	17%	1%		9%	1%	7%	1%			
24	+ Nutricia MD	12%	1%	4%	1%		24%	9%	12%	8%			
25	+ Rowa	-8%	1%	-1%	1%		-8%	4%	1%	5%			

# MANUFACTURER ANALYSIS

## PHARMACEUTICAL

Rank	Manufacturer	Values					Units				
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		4%			5%		3%		
1	+ Vertex Pharma UK	44%	8%	8%	6%		48%	0%	12%	0%	
2	+ Janssen-Cilag	10%	6%	11%	6%		-9%	1%	-14%	1%	
3	+ Novartis	-1%	6%	4%	6%		-2%	1%	-3%	1%	
4	+ Pfizer AG	-27%	4%	-21%	5%		-8%	2%	-3%	2%	
5	+ Teva Pharma Ind	-4%	4%	-2%	4%		-5%	9%	0%	9%	
6	+ Abbvie	-37%	3%	-32%	4%		-39%	0%	-31%	0%	
7	+ GlaxoSmithKline IE	-5%	4%	3%	4%		-10%	4%	-3%	4%	
8	+ Amgen	37%	4%	33%	4%		16%	0%	18%	0%	
9	+ Celgene EU	0%	3%	11%	3%		0%	0%	7%	0%	
10	+ MSD	-11%	2%	-14%	3%		1%	1%	-1%	1%	
11	+ Bristol-Myers Squibb	21%	2%	19%	2%		19%	1%	20%	0%	
12	+ AstraZeneca Pharma	15%	2%	11%	2%		9%	1%	5%	1%	
13	+ Biogen Idec	59%	3%	106%	2%		61%	0%	113%	0%	
14	+ Novo Nordisk	5%	2%	9%	2%		2%	1%	4%	1%	
15	+ Mylan	23%	2%	10%	2%		-2%	4%	-1%	4%	
16	+ Accord HC	20%	2%	20%	2%		22%	8%	15%	8%	
17	+ Roche	7%	2%	7%	2%		3%	0%	5%	0%	
18	+ Clonmel HC	9%	2%	2%	2%		10%	8%	1%	8%	
19	+ Boehringer Ingelheim	5%	2%	6%	2%		4%	1%	5%	1%	
20	+ Bayer AG	-14%	2%	-7%	2%		-18%	1%	-7%	1%	
21	+ Sanofi	4%	2%	3%	2%		10%	4%	10%	3%	
22	+ Astellas	2%	2%	4%	2%		2%	0%	0%	0%	
23	+ Takeda IE	18%	1%	17%	1%		9%	1%	7%	1%	
24	+ Rowa	-8%	1%	-1%	1%		-8%	4%	1%	5%	
25	+ Merck	10%	1%	22%	1%		-2%	0%	-15%	0%	

# MANUFACTURER ANALYSIS

## ETHICAL

Rank	Manufacturer	Values						Units					
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	<b>Total</b>	5%		3%			3%		2%				
1	+ Vertex Pharma UK	44%	9%	8%	7%		48%	0%	12%	0%			
2	+ Janssen-Cilag	10%	7%	11%	7%		-9%	1%	-14%	1%			
3	+ Novartis	-1%	6%	4%	7%		-2%	2%	-3%	2%			
4	+ Pfizer AG	-27%	4%	-21%	5%		-8%	3%	-3%	3%			
5	+ Abbvie	-37%	3%	-32%	4%		-39%	0%	-31%	0%			
6	+ GlaxoSmithKline IE	-5%	4%	3%	4%		-10%	6%	-3%	6%			
7	+ Amgen	37%	5%	33%	4%		16%	0%	18%	0%			
8	+ Celgene EU	0%	3%	11%	3%		0%	0%	7%	0%			
9	+ MSD	-11%	3%	-14%	3%		1%	2%	-1%	2%			
10	+ Bristol-Myers Squibb	21%	3%	19%	3%		19%	1%	20%	1%			
11	+ AstraZeneca Pharma	15%	3%	11%	3%		9%	2%	5%	2%			
12	+ Biogen Idec	59%	3%	106%	3%		61%	0%	113%	0%			
13	+ Novo Nordisk	5%	2%	9%	2%		2%	1%	4%	1%			
14	+ Roche	7%	2%	7%	2%		3%	0%	5%	0%			
15	+ Boehringer Ingelheim	5%	2%	6%	2%		4%	1%	5%	1%			
16	+ Bayer AG	-14%	2%	-7%	2%		-18%	2%	-7%	2%			
17	+ Sanofi	4%	2%	3%	2%		10%	5%	10%	4%			
18	+ Astellas	2%	2%	4%	2%		2%	1%	0%	1%			
19	+ Mylan	24%	2%	7%	2%		-2%	3%	-6%	3%			
20	+ Teva Pharma Ind	-4%	2%	-2%	2%		-9%	3%	3%	3%			
21	+ Takeda IE	18%	2%	17%	2%		9%	1%	7%	1%			
22	+ Nutricia MD	15%	1%	4%	2%		25%	12%	12%	12%			
23	+ Merck	10%	2%	22%	2%		-2%	0%	-15%	0%			
24	+ UCB Pharma IE	9%	1%	7%	1%		1%	1%	3%	1%			
25	+ ULM Manuf	26%	2%	21%	1%		13%	2%	17%	2%			

# MANUFACTURER ANALYSIS

## GENERIC

Rank	Manufacturer	Values					Units				
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	<b>6%</b>		<b>4%</b>			<b>8%</b>		<b>5%</b>		
1	+ Teva Pharma Ind	-3%	24%	-2%	25%		-4%	24%	-2%	26%	
2	+ Accord HC	22%	23%	19%	21%		31%	24%	20%	21%	
3	+ Clonmel HC	26%	13%	6%	12%		34%	13%	6%	12%	
4	+ Rowa	-6%	10%	1%	11%		-6%	11%	4%	12%	
5	+ Krka Pharma	-2%	8%	-12%	8%		0%	7%	-8%	8%	
6	+ Pinewood	6%	6%	10%	6%		8%	5%	11%	5%	
7	+ Mylan	17%	6%	20%	5%		0%	4%	10%	5%	
8	+ Bluefish	52%	3%	66%	3%		32%	4%	44%	4%	
9	+ Actavis Group	-49%	1%	-45%	2%		-31%	2%	-41%	2%	
10	+ Wockhardt	8%	2%	38%	2%		17%	2%	44%	2%	
11	+ Fannin	-52%	1%	-32%	1%		-61%	1%	-43%	1%	
12	+ Consilient Health	99%	1%	39%	0%		84%	0%	60%	0%	
13	+ Tillomed Lab	0%	0%	1%	0%		0%	0%	1%	0%	
14	+ Galen	-2%	0%	-21%	0%		0%	0%	-18%	0%	
15	+ Azure Pharmaceuticals	63845%	0%	446228%	0%		177807%	0%	#####	0%	
16	+ Rosemont Pharma	35%	0%	10%	0%		30%	0%	-28%	0%	
17	+ Phoenix Lab	0%	0%	14%	0%		0%	0%	14%	0%	
18	+ RPH Pharma	-65%	0%	-34%	0%		-65%	0%	-34%	0%	
19	+ Pharmathen	27%	0%	24%	0%		27%	0%	24%	0%	
20	+ Aribamed	63%	0%	23%	0%		62%	0%	41%	0%	
21	+ Orion Corp	12%	0%	13%	0%		6%	0%	10%	0%	
22	+ Bristol Lab	7830%	0%	129552%	0%		7919%	0%	133918%	0%	
23	+ Advanz Pharma IE	20%	0%	5%	0%		31%	0%	2%	0%	
24	+ Ranbaxy IE	-48%	0%	-20%	0%		-54%	0%	-25%	0%	
25	+ G.L. Pharma	935%	0%	2190%	0%		935%	0%	2190%	0%	

# MANUFACTURER ANALYSIS

## OTC (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	4%		4%			3%		2%		
1	+ Johnson & Johnson	1%	23%	6%	24%		6%	10%	4%	10%	
2	+ Takeda IE	9%	20%	6%	19%		10%	19%	7%	18%	
3	+ Reckitt Benckiser IE	8%	10%	6%	10%		5%	13%	4%	13%	
4	+ Bausch & Lomb	-2%	6%	-7%	6%		-2%	8%	-6%	8%	
5	+ Rowa	151%	8%	65%	5%		165%	11%	71%	7%	
6	+ Clonmel HC	15%	5%	5%	5%		15%	12%	4%	12%	
7	+ Fannin	4%	4%	3%	4%		3%	3%	3%	3%	
8	+ HRA Pharma	-9%	3%	-2%	3%		-10%	1%	-3%	1%	
9	+ Pfizer HC	2%	3%	7%	3%		2%	2%	8%	2%	
10	+ Phoenix Lab	-40%	2%	-15%	3%		-41%	3%	-16%	4%	
11	+ Perrigo Co.	-2%	2%	-2%	3%		-6%	1%	-2%	1%	
12	+ Sanofi	13%	2%	7%	2%		4%	4%	0%	4%	
13	+ Pinewood	-53%	1%	-23%	2%		-50%	2%	-22%	3%	
14	+ Allergan IE	-2%	2%	-9%	2%		-4%	2%	-6%	2%	
15	+ Mylan	-65%	1%	-22%	1%		-84%	1%	-25%	3%	
16	+ GlaxoSmithKline IE	9%	2%	2%	1%		5%	2%	0%	2%	
17	+ GlaxoSmithKline HC	4%	1%	-3%	1%		-8%	1%	-13%	1%	
18	+ Ricesteele Manuf	-12%	1%	3%	1%		-15%	1%	0%	1%	
19	+ RPH Pharma	4%	0%	1%	0%		-2%	0%	-2%	0%	
20	+ Novartis	0%	0%	-3%	0%		0%	1%	-3%	1%	
21	+ Bayer AG	54%	1%	3%	0%		63%	1%	2%	0%	
22	+ Teofarma	7%	0%	-9%	0%		14%	0%	0%	0%	
23	+ PCO Manuf	-57%	0%	-7%	0%		-56%	0%	-8%	0%	
24	+ Teva Pharma Ind	13%	0%	0%	0%		13%	0%	7%	0%	
25	+ Lab Casen-fleet	41%	0%	19%	0%		41%	0%	19%	0%	

# MANUFACTURER ANALYSIS

## PATIENT CARE (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	5%		5%			5%		3%		
1	+ Coloplast UK	6%	12%	5%	12%		12%	5%	9%	5%	
2	+ Medtronic Minimed	3%	9%	17%	9%		5%	1%	13%	2%	
3	+ Ascensia Diabetes Care IE	3%	9%	5%	9%		4%	8%	5%	9%	
4	+ Abbott Diabetes Care	-17%	8%	-9%	9%		-10%	6%	-7%	7%	
5	+ LifeScan	10%	7%	8%	7%		10%	7%	8%	7%	
6	+ Roche Diabetes Care	-7%	6%	-7%	7%		-6%	6%	-5%	6%	
7	+ Hollister	9%	6%	6%	6%		10%	2%	6%	2%	
8	+ B. Braun MD	-1%	4%	6%	4%		3%	1%	8%	1%	
9	+ Salts HC	13%	4%	6%	4%		9%	2%	3%	2%	
10	+ DexCom	227%	6%	189%	4%		217%	0%	214%	0%	
11	+ Convatec HC	7%	3%	3%	3%		14%	3%	3%	3%	
12	+ Becton Dickinson & Co.	1%	3%	2%	3%		1%	3%	1%	3%	
13	+ Scope Ophthalmics	13%	2%	14%	2%		13%	7%	15%	7%	
14	+ 3M IE	44%	3%	49%	2%		30%	3%	21%	3%	
15	+ Dansac	-2%	2%	2%	2%		-1%	1%	0%	1%	
16	+ Novo Nordisk	-5%	2%	-3%	2%		-5%	2%	-4%	2%	
17	+ C.R. Bard	2%	2%	6%	2%		5%	4%	8%	4%	
18	+ Eakin	-4%	1%	14%	1%		0%	1%	22%	1%	
19	+ Alliance Pharma	0%	1%	0%	1%		3%	1%	2%	1%	
20	+ Medicon IE	-4%	1%	-6%	1%		11%	1%	4%	1%	
21	+ Smith & Nephew	19%	1%	2%	1%		7%	3%	-4%	3%	
22	+ Lab Thea	17%	1%	25%	1%		17%	2%	26%	2%	
23	+ Nutricia MD	-54%	0%	-45%	1%		-7%	0%	0%	0%	
24	+ Clonmel HC	-1%	1%	-11%	1%		-3%	2%	-10%	1%	
25	+ Premier MD	-30%	1%	-30%	1%		-25%	0%	-25%	0%	



# MANUFACTURER ANALYSIS

## SUPPLEMENTS (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		November 2020		MAT November 2020		Last 12 Months	November 2020		MAT November 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	<b>Total</b>	<b>2%</b>		<b>5%</b>			<b>14%</b>		<b>8%</b>		
1	+ Bio-oil research	-3%	30%	3%	29%		-3%	10%	3%	10%	
2	+ Sona Nut	11%	15%	1%	14%		10%	28%	2%	28%	
3	+ MacuVision EU	9%	7%	5%	7%		7%	5%	4%	5%	
4	+ PrecisionBiotics	15%	6%	15%	5%		19%	3%	19%	3%	
5	+ BBI HC	-9%	4%	21%	4%		-9%	4%	0%	5%	
6	+ PharmaSource	-66%	3%	-35%	4%		-55%	1%	-22%	2%	
7	+ QM Specials	-27%	3%	-16%	3%		24%	2%	2%	1%	
8	+ Medisource	-13%	1%	-17%	3%		-28%	1%	-27%	2%	
9	+ Pfizer HC	30%	3%	16%	3%		26%	8%	15%	8%	
10	+ Scope Hc	54%	3%	30%	3%		53%	6%	30%	5%	
11	+ Kelkin	10%	3%	92%	3%		13%	3%	-3%	3%	
12	+ Bausch & Lomb	14%	2%	8%	2%		12%	3%	8%	3%	
13	+ Pharma Nord	2%	2%	-6%	2%		-3%	2%	-10%	2%	
14	+ Lamberts HC	24%	1%	50%	1%		23%	0%	112%	1%	
15	+ Mylan	20%	2%	1%	1%		21%	1%	3%	1%	
16	+ Elements	23%	1%	-34%	1%		10%	0%	-32%	0%	
17	+ Natures Aid	49%	1%	11%	1%		47%	3%	3%	2%	
18	+ Rowa	135%	1%	134%	1%		135%	4%	134%	3%	
19	+ Solvotrin Therapeutics	43%	1%	61%	1%		43%	1%	61%	1%	
20	+ Seven Seas	37%	1%	45%	1%		24%	1%	27%	2%	
21	+ Vitabiotics	25%	1%	-11%	1%		17%	1%	-5%	1%	
22	+ Greenlight Supplements	-26%	0%	30%	1%		-24%	0%	28%	0%	
23	+ Scope Ophthalmics	-17%	0%	34%	1%		-14%	1%	49%	1%	
24	+ Flora Manuf & Distr	52%	1%	19%	0%		49%	0%	17%	0%	
25	+ A Nelson & Co	41%	1%	8%	0%		67%	1%	24%	1%	



Knowledge for better health

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