

Prescription Market Trends

Pharmacy channel (Ireland)

October 2020



MAIN MARKET TRENDS

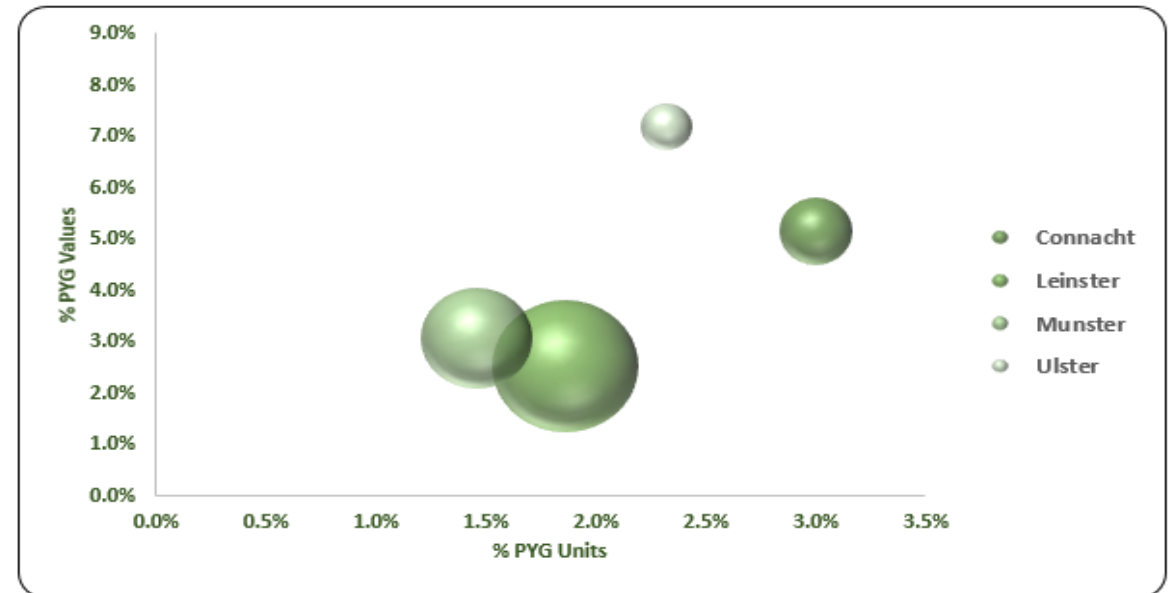
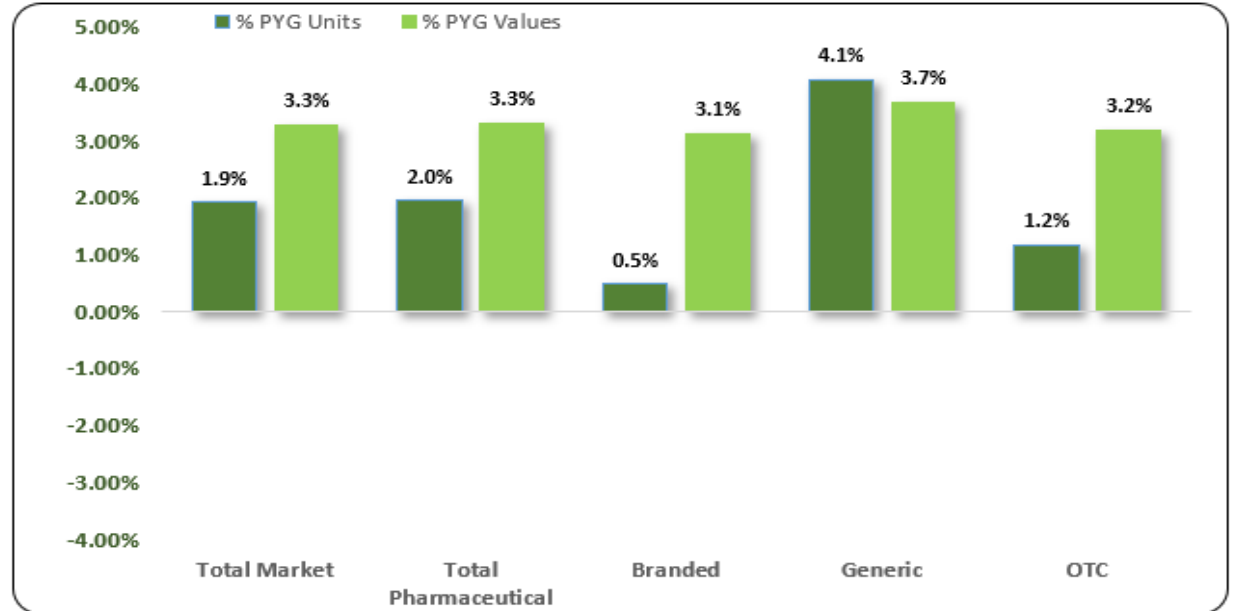
October 2020 MAT VS October 2019 MAT

The **Irish Prescription** market, in the last MAT, grew 3.3% in value and 1.9% in units.

The main driver of the value growth are the innovative brands at 3.1%. Generic sees an increase of 3.7%, while the OTC sees an increase in value of 3.2%.

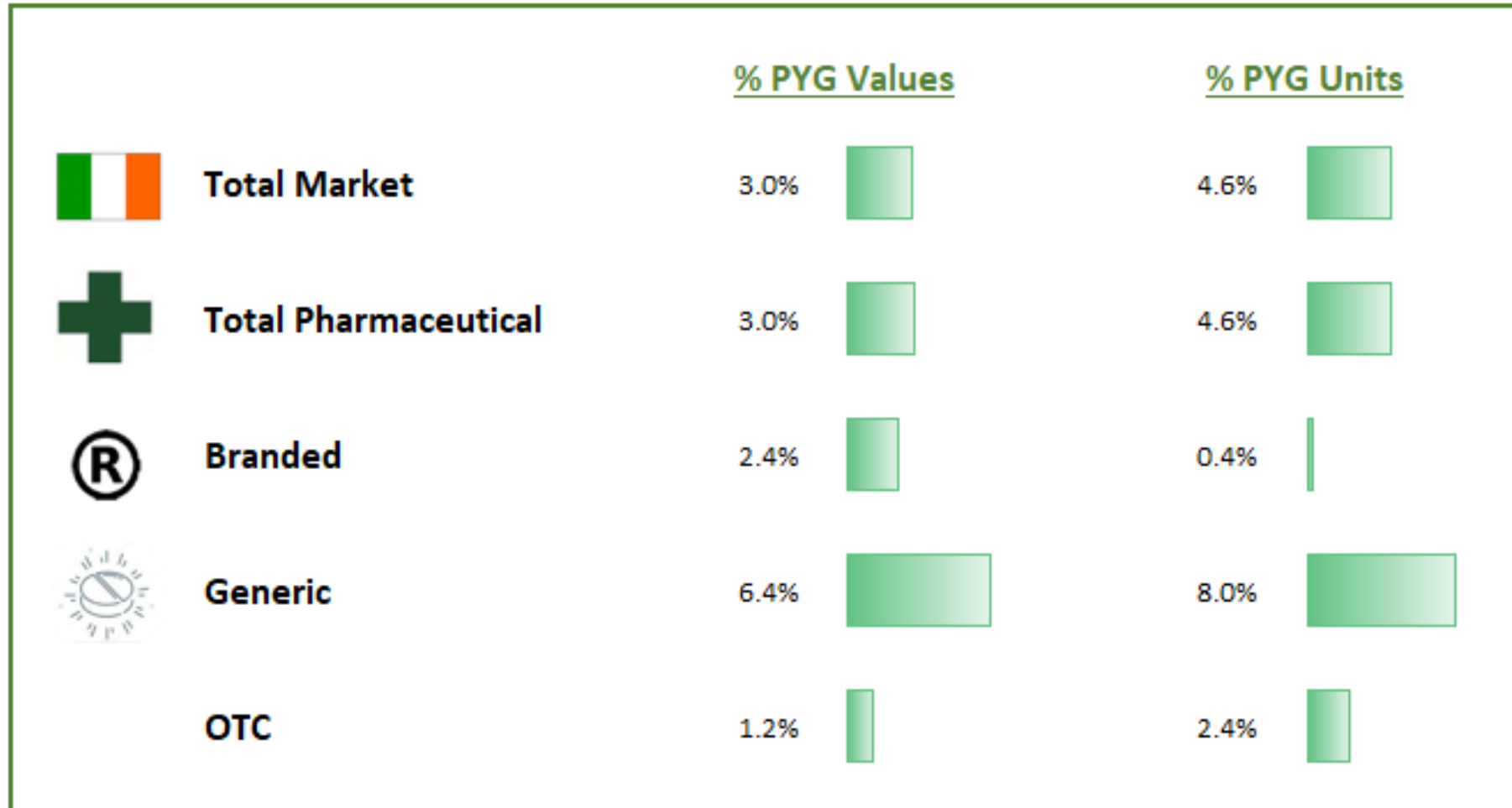
In units Generic medicines had an increase of 4.1%, Branded of 0.5% and OTCs of 1.2%.

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



MARKET SEGMENT TRENDS

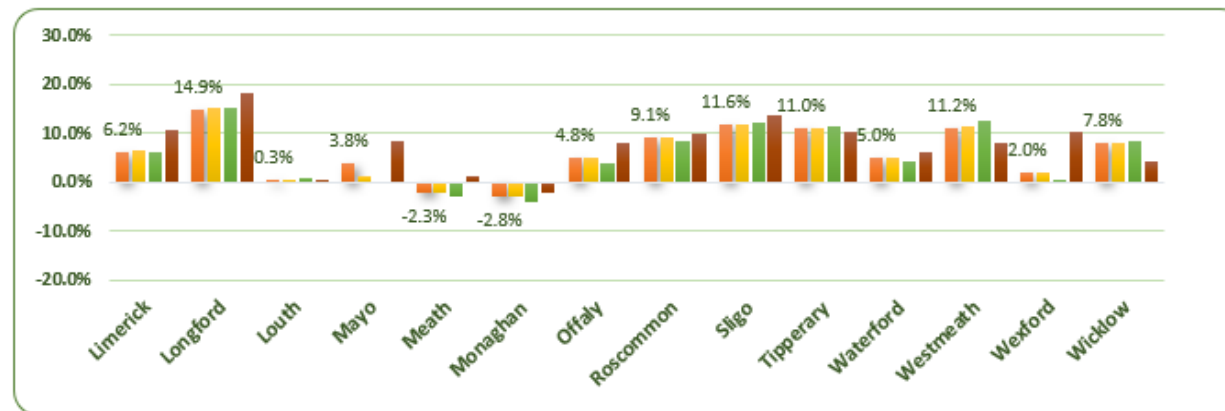
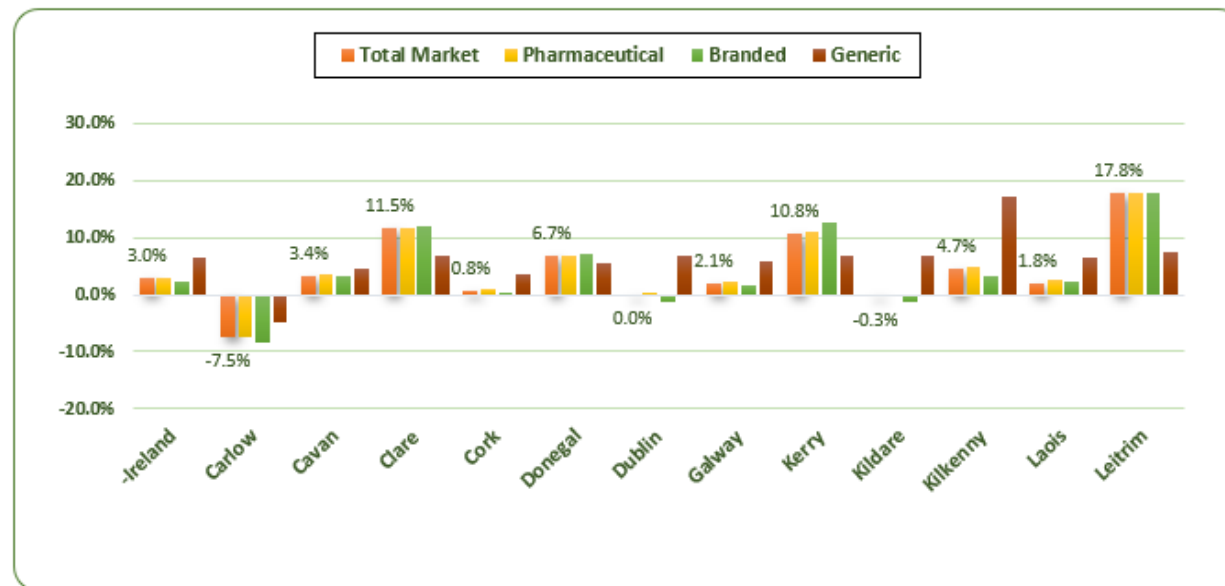
October 2020 VS October 2019



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

October 2020 VALUE VS October 2019 VALUE

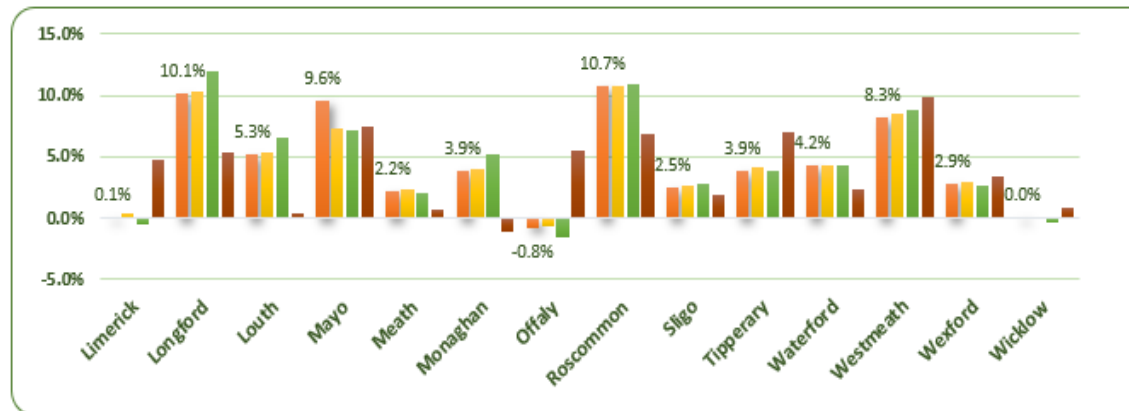
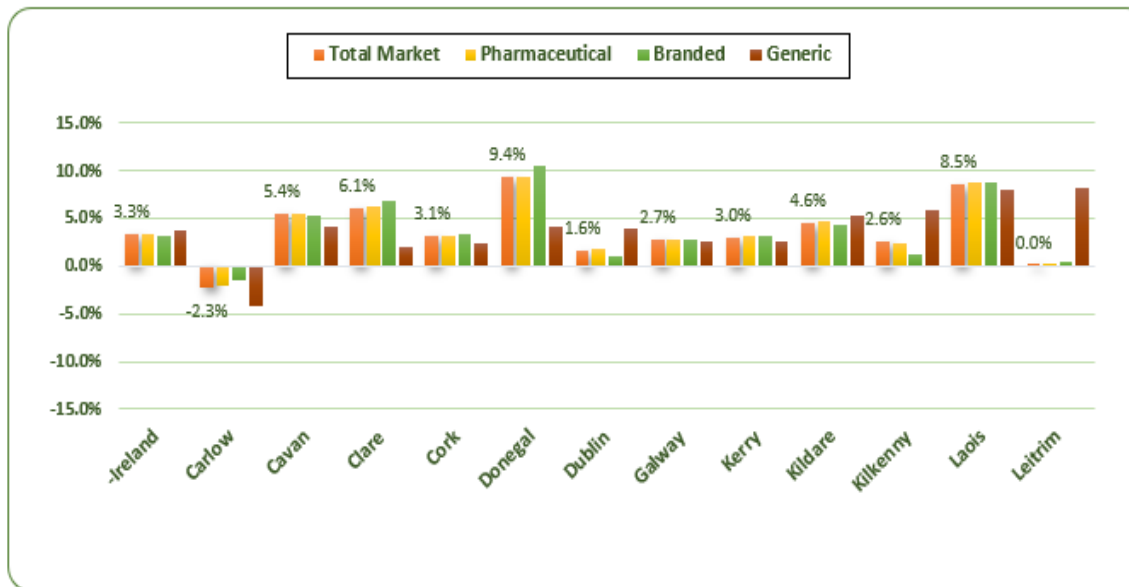
County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	3.0%	3.0%	2.4%	6.4%
Carlow	-7.5%	-7.5%	-8.2%	-4.8%
Cavan	3.4%	3.5%	3.3%	4.5%
Clare	11.5%	11.6%	11.9%	6.9%
Cork	0.8%	0.9%	0.4%	3.5%
Donegal	6.7%	6.8%	7.2%	5.6%
Dublin	0.0%	0.1%	-1.2%	6.8%
Galway	2.1%	2.2%	1.7%	5.7%
Kerry	10.8%	11.2%	12.5%	6.8%
Kildare	-0.3%	-0.2%	-1.4%	6.9%
Kilkenny	4.7%	4.8%	3.3%	17.3%
Laois	1.8%	2.6%	2.4%	6.7%
Leitrim	17.8%	17.7%	17.7%	7.4%
Limerick	6.2%	6.5%	6.0%	10.7%
Longford	14.9%	15.1%	15.0%	18.0%
Louth	0.3%	0.4%	0.8%	0.3%
Mayo	3.8%	1.1%	-0.3%	8.2%
Meath	-2.3%	-2.3%	-3.0%	1.3%
Monaghan	-2.8%	-2.9%	-4.2%	-2.1%
Offaly	4.8%	5.0%	3.9%	8.1%
Roscommon	9.1%	9.1%	8.2%	10.1%
Sligo	11.6%	11.6%	12.3%	13.6%
Tipperary	11.0%	11.1%	11.3%	10.1%
Waterford	5.0%	5.0%	4.1%	6.3%
Westmeath	11.2%	11.6%	12.3%	7.9%
Wexford	2.0%	2.0%	0.2%	10.3%
Wicklow	7.8%	8.0%	8.5%	4.1%



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

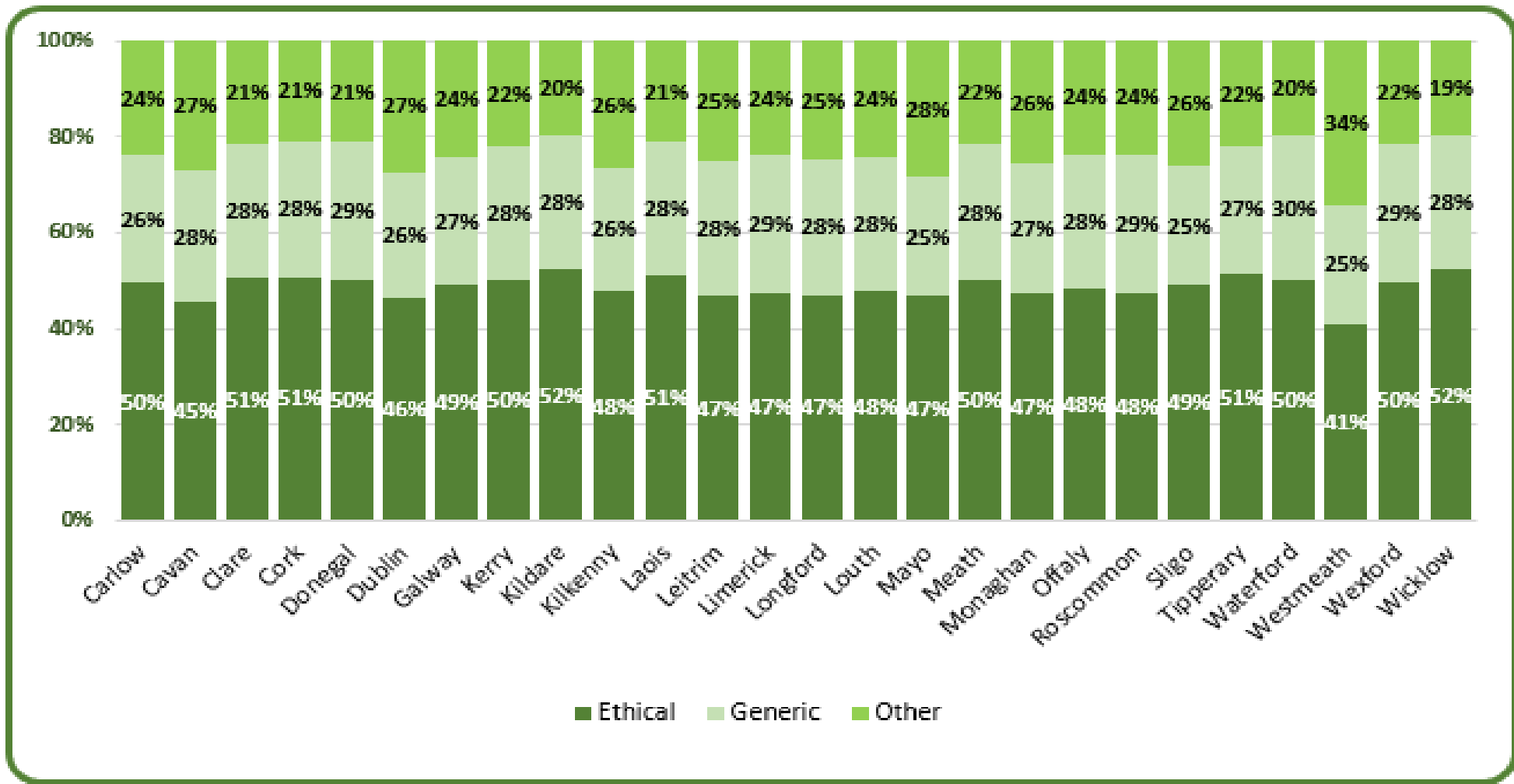
October 2020 MAT VALUE VS October MAT VALUE

County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	3.3%	3.3%	3.1%	3.7%
Carlow	-2.3%	-2.1%	-1.5%	-4.2%
Cavan	5.4%	5.4%	5.3%	4.2%
Clare	6.1%	6.2%	6.8%	2.0%
Cork	3.1%	3.2%	3.4%	2.5%
Donegal	9.4%	9.5%	10.5%	4.2%
Dublin	1.6%	1.8%	1.1%	3.9%
Galway	2.7%	2.8%	2.8%	2.7%
Kerry	3.0%	3.2%	3.2%	2.5%
Kildare	4.6%	4.7%	4.2%	5.3%
Kilkenny	2.6%	2.4%	1.3%	5.8%
Laois	8.5%	8.7%	8.7%	8.1%
Leitrim	0.0%	0.2%	0.4%	8.2%
Limerick	0.1%	0.3%	-0.5%	4.7%
Longford	10.1%	10.4%	12.0%	5.4%
Louth	5.3%	5.4%	6.6%	0.5%
Mayo	9.6%	7.3%	7.1%	7.4%
Meath	2.2%	2.3%	2.1%	0.7%
Monaghan	3.9%	4.1%	5.3%	-1.1%
Offaly	-0.8%	-0.6%	-1.6%	5.5%
Roscommon	10.7%	10.8%	11.0%	6.8%
Sligo	2.5%	2.6%	2.8%	1.9%
Tipperary	3.9%	4.2%	3.9%	7.1%
Waterford	4.2%	4.3%	4.3%	2.4%
Westmeath	8.3%	8.5%	8.9%	9.8%
Wexford	2.9%	3.0%	2.7%	3.4%
Wicklow	0.0%	0.1%	-0.3%	0.9%



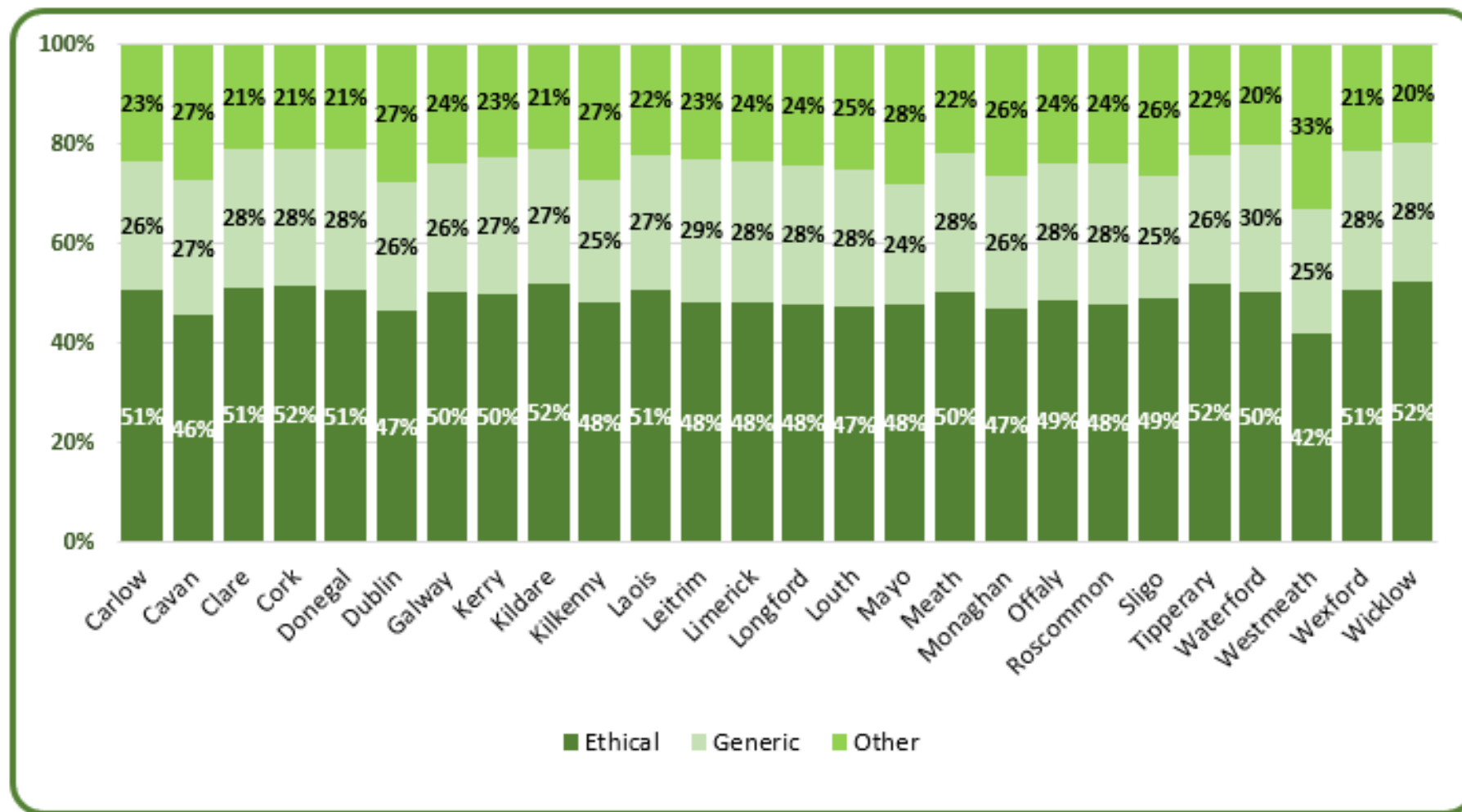
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN October 2020



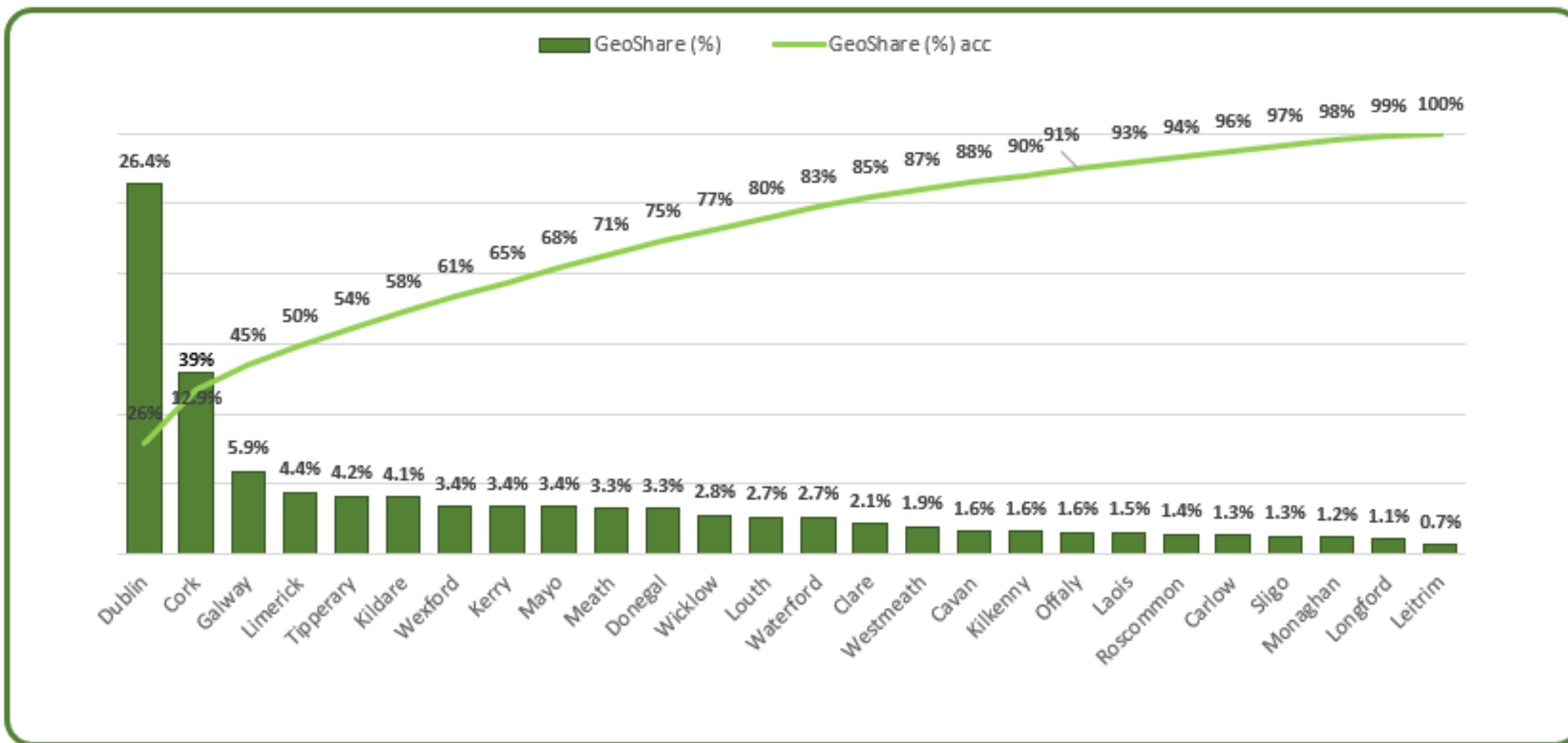
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN October 2020 MAT



GEOGRAPHICAL SHARE BY COUNTY

October 2020 MAT VALUE



MANUFACTURER ANALYSIS

TOTAL MARKET

Rank	Manufacturer	Values					Units				
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	3%		3%			5%		2%		
1	+ Vertex Pharma UK	7%	6%	5%	6%		6%	0%	10%	0%	
2	+ Novartis	-1%	6%	4%	6%		-5%	1%	-3%	1%	
3	+ Janssen-Cilag	6%	6%	11%	6%		-13%	1%	-14%	1%	
4	+ Pfizer AG	-28%	4%	-20%	5%		-6%	2%	-3%	2%	
5	+ Abbvie	-38%	3%	-31%	4%		-39%	0%	-29%	0%	
6	+ Teva Pharma Ind	-3%	4%	-2%	4%		-3%	9%	-1%	9%	
7	+ GlaxoSmithKline IE	1%	4%	4%	4%		-4%	4%	-2%	4%	
8	+ Amgen	33%	4%	31%	4%		10%	0%	17%	0%	
9	+ Celgene EU	1%	3%	13%	3%		1%	0%	9%	0%	
10	+ MSD	-10%	2%	-14%	3%		2%	1%	-2%	1%	
11	+ Bristol-Myers Squibb	19%	2%	18%	2%		21%	0%	20%	0%	
12	+ AstraZeneca Pharma	20%	3%	10%	2%		13%	1%	4%	1%	
13	+ Biogen Idec	84%	3%	108%	2%		84%	0%	118%	0%	
14	+ Novo Nordisk	7%	2%	9%	2%		4%	1%	4%	1%	
15	+ Mylan	21%	2%	8%	2%		-1%	4%	-2%	4%	
16	+ Accord HC	19%	2%	21%	2%		16%	8%	14%	7%	
17	+ Roche	1%	2%	7%	2%		2%	0%	5%	0%	
18	+ Clonmel HC	9%	2%	0%	2%		11%	8%	0%	8%	
19	+ Bayer AG	-14%	2%	-6%	2%		-11%	1%	-6%	1%	
20	+ Boehringer Ingelheim	9%	2%	6%	2%		7%	1%	4%	1%	
21	+ Sanofi	4%	2%	4%	2%		10%	4%	11%	3%	
22	+ Astellas	-2%	2%	5%	2%		2%	0%	0%	0%	
23	+ Rowa	-5%	1%	-1%	1%		-3%	4%	2%	5%	
24	+ Takeda IE	16%	1%	18%	1%		9%	1%	7%	1%	
25	+ Nutricia MD	7%	1%	2%	1%		18%	9%	9%	8%	

MANUFACTURER ANALYSIS

PHARMACEUTICAL

Rank	Manufacturer	Values						Units					
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	Total	3%		3%			5%		2%				
1	+ Vertex Pharma UK	7%	6%	5%	6%		6%	0%	10%	0%			
2	+ Novartis	-1%	6%	4%	6%		-5%	1%	-3%	1%			
3	+ Janssen-Cilag	6%	6%	11%	6%		-13%	1%	-14%	1%			
4	+ Pfizer AG	-28%	4%	-20%	5%		-6%	2%	-3%	2%			
5	+ Abbvie	-38%	3%	-31%	4%		-39%	0%	-29%	0%			
6	+ Teva Pharma Ind	-3%	4%	-2%	4%		-3%	9%	-1%	9%			
7	+ GlaxoSmithKline IE	1%	4%	4%	4%		-4%	4%	-2%	4%			
8	+ Amgen	33%	4%	31%	4%		10%	0%	17%	0%			
9	+ Celgene EU	1%	3%	13%	3%		1%	0%	9%	0%			
10	+ MSD	-10%	2%	-14%	3%		2%	1%	-2%	1%			
11	+ Bristol-Myers Squibb	19%	2%	18%	2%		21%	1%	20%	0%			
12	+ AstraZeneca Pharma	20%	3%	10%	2%		13%	1%	4%	1%			
13	+ Biogen Idec	84%	3%	108%	2%		84%	0%	118%	0%			
14	+ Novo Nordisk	7%	2%	9%	2%		4%	1%	4%	1%			
15	+ Mylan	21%	2%	8%	2%		-1%	4%	-2%	4%			
16	+ Accord HC	19%	2%	21%	2%		16%	8%	14%	7%			
17	+ Roche	1%	2%	7%	2%		2%	0%	5%	0%			
18	+ Clonmel HC	9%	2%	0%	2%		11%	8%	0%	8%			
19	+ Bayer AG	-14%	2%	-6%	2%		-11%	1%	-6%	1%			
20	+ Boehringer Ingelheim	9%	2%	6%	2%		7%	1%	4%	1%			
21	+ Sanofi	4%	2%	4%	2%		10%	4%	11%	3%			
22	+ Astellas	-2%	2%	5%	2%		2%	0%	0%	0%			
23	+ Rowa	-5%	1%	-1%	1%		-4%	4%	2%	5%			
24	+ Takeda IE	16%	1%	18%	1%		9%	1%	7%	1%			
25	+ Merck	24%	2%	25%	1%		1%	0%	-16%	0%			

MANUFACTURER ANALYSIS

ETHICAL

Rank	Manufacturer	Values						Units					
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	Total	3%		3%			3%		1%				
1	+ Vertex Pharma UK	7%	7%	5%	7%		6%	0%	10%	0%			
2	+ Novartis	-1%	6%	4%	7%		-5%	2%	-3%	2%			
3	+ Janssen-Cilag	6%	7%	11%	7%		-13%	1%	-14%	1%			
4	+ Pfizer AG	-28%	4%	-20%	5%		-6%	3%	-3%	3%			
5	+ Abbvie	-38%	4%	-31%	4%		-39%	0%	-29%	0%			
6	+ GlaxoSmithKline IE	1%	4%	4%	4%		-4%	6%	-2%	6%			
7	+ Amgen	33%	4%	31%	4%		10%	0%	17%	0%			
8	+ Celgene EU	1%	3%	13%	3%		1%	0%	9%	0%			
9	+ MSD	-10%	3%	-14%	3%		2%	2%	-2%	2%			
10	+ Bristol-Myers Squibb	19%	3%	18%	3%		21%	1%	20%	1%			
11	+ AstraZeneca Pharma	20%	3%	10%	3%		13%	2%	4%	2%			
12	+ Biogen Idec	84%	3%	108%	2%		84%	0%	118%	0%			
13	+ Novo Nordisk	7%	3%	9%	2%		4%	1%	4%	1%			
14	+ Roche	1%	2%	7%	2%		2%	0%	5%	0%			
15	+ Bayer AG	-14%	2%	-6%	2%		-11%	2%	-6%	2%			
16	+ Boehringer Ingelheim	9%	2%	6%	2%		7%	1%	4%	1%			
17	+ Sanofi	4%	2%	4%	2%		10%	5%	11%	4%			
18	+ Astellas	-2%	2%	5%	2%		2%	1%	0%	1%			
19	+ Teva Pharma Ind	-2%	2%	-2%	2%		-4%	3%	4%	3%			
20	+ Mylan	21%	2%	5%	2%		-1%	3%	-7%	3%			
21	+ Takeda IE	16%	2%	18%	2%		9%	1%	7%	1%			
22	+ Nutricia MD	10%	1%	2%	2%		18%	12%	9%	11%			
23	+ Merck	24%	2%	25%	2%		1%	1%	-16%	0%			
24	+ UCB Pharma IE	4%	1%	6%	1%		3%	1%	3%	1%			
25	+ ULM Manuf	24%	2%	21%	1%		9%	2%	18%	2%			

MANUFACTURER ANALYSIS

GENERIC

Rank	Manufacturer	Values					Units				
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	6%		4%			8%		4%		
1	+ Teva Pharma Ind	-3%	24%	-2%	26%		-3%	25%	-2%	26%	
2	+ Accord HC	20%	23%	19%	21%		22%	23%	19%	21%	
3	+ Clonmel HC	22%	13%	4%	11%		28%	13%	3%	12%	
4	+ Rowa	-2%	10%	2%	11%		-1%	11%	4%	13%	
5	+ Krka Pharma	-5%	7%	-13%	8%		0%	7%	-10%	8%	
6	+ Pinewood	15%	6%	9%	6%		20%	5%	9%	5%	
7	+ Mylan	21%	6%	20%	5%		-2%	4%	11%	5%	
8	+ Bluefish	64%	3%	70%	3%		46%	4%	46%	4%	
9	+ Actavis Group	-51%	2%	-44%	2%		-34%	2%	-42%	2%	
10	+ Wockhardt	13%	2%	44%	2%		22%	2%	49%	2%	
11	+ Fannin	-48%	1%	-26%	2%		-55%	1%	-35%	1%	
12	+ Tillomed Lab	0%	0%	0%	0%		0%	0%	0%	0%	
13	+ Consilient Health	79%	0%	31%	0%		88%	0%	53%	0%	
14	+ Galen	3%	0%	-23%	0%		5%	0%	-20%	0%	
15	+ Rosemont Pharma	43%	0%	6%	0%		32%	0%	-32%	0%	
16	+ Azure Pharmaceuticals	0%	0%	0%	0%		0%	0%	0%	0%	
17	+ Phoenix Lab	4%	0%	17%	0%		4%	0%	17%	0%	
18	+ RPH Pharma	-56%	0%	-23%	0%		-56%	0%	-24%	0%	
19	+ Pharmathen	31%	0%	24%	0%		31%	0%	24%	0%	
20	+ Aribamed	70%	0%	15%	0%		63%	0%	34%	0%	
21	+ Orion Corp	12%	0%	12%	0%		6%	0%	10%	0%	
22	+ Bristol Lab	15801%	0%	166990%	0%		16076%	0%	172501%	0%	
23	+ Advanz Pharma IE	0%	0%	3%	0%		27%	0%	0%	0%	
24	+ Ranbaxy IE	-27%	0%	-14%	0%		-35%	0%	-19%	0%	
25	+ G.L. Pharma	1260%	0%	2698%	0%		1260%	0%	2698%	0%	

MANUFACTURER ANALYSIS

OTC (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values						Units					
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	Total	1%		3%			2%		2%				
1	+ Johnson & Johnson	-3%	24%	6%	24%		2%	10%	4%	10%			
2	+ Takeda IE	9%	20%	6%	19%		10%	19%	7%	18%			
3	+ Reckitt Benckiser IE	5%	10%	6%	10%		3%	13%	3%	13%			
4	+ Bausch & Lomb	-5%	6%	-8%	6%		-5%	8%	-6%	8%			
5	+ Rowa	144%	8%	52%	5%		157%	10%	56%	6%			
6	+ Clonmel HC	10%	5%	3%	5%		14%	12%	1%	12%			
7	+ Fannin	6%	4%	2%	4%		6%	3%	2%	3%			
8	+ HRA Pharma	-15%	3%	-1%	3%		-15%	1%	-2%	1%			
9	+ Pfizer HC	4%	3%	7%	3%		4%	2%	8%	2%			
10	+ Phoenix Lab	-28%	2%	-11%	3%		-29%	4%	-12%	5%			
11	+ Perrigo Co.	-16%	2%	-3%	3%		-16%	1%	-2%	1%			
12	+ Sanofi	8%	2%	5%	2%		3%	4%	-1%	4%			
13	+ Pinewood	-47%	1%	-20%	2%		-43%	2%	-19%	3%			
14	+ Allergan IE	-3%	2%	-11%	2%		-4%	2%	-8%	2%			
15	+ Mylan	-66%	1%	-16%	2%		-83%	1%	-18%	3%			
16	+ GlaxoSmithKline IE	1%	1%	1%	1%		1%	2%	-2%	2%			
17	+ GlaxoSmithKline HC	8%	1%	-4%	1%		-1%	1%	-14%	1%			
18	+ Ricesteele Manuf	-20%	1%	3%	1%		-23%	1%	1%	1%			
19	+ RPH Pharma	4%	0%	1%	0%		2%	0%	-1%	0%			
20	+ Novartis	-7%	0%	-4%	0%		-7%	1%	-4%	1%			
21	+ Bayer AG	34%	0%	-1%	0%		41%	0%	-3%	0%			
22	+ PCO Manuf	-31%	0%	-3%	0%		-33%	0%	-4%	0%			
23	+ Teofarma	-40%	0%	-9%	0%		-34%	0%	0%	0%			
24	+ Teva Pharma Ind	10%	0%	-1%	0%		23%	0%	4%	0%			
25	+ Lab Casen-fleet	-4%	0%	12%	0%		-4%	0%	12%	0%			

MANUFACTURER ANALYSIS

PATIENT CARE (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values						Units					
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	Total	4%		5%			0%		3%				
1	+ Coloplast UK	2%	12%	5%	12%		4%	5%	9%	5%			
2	+ Medtronic Minimed	10%	9%	19%	9%		12%	2%	15%	2%			
3	+ Ascensia Diabetes Care IE	5%	9%	5%	9%		5%	9%	5%	9%			
4	+ Abbott Diabetes Care	-14%	8%	-8%	9%		-7%	7%	-7%	7%			
5	+ LifeScan	13%	7%	7%	7%		14%	7%	7%	7%			
6	+ Roche Diabetes Care	-7%	6%	-7%	7%		-6%	6%	-5%	6%			
7	+ Hollister	2%	6%	6%	6%		3%	3%	5%	2%			
8	+ B. Braun MD	-2%	4%	7%	4%		0%	1%	8%	1%			
9	+ Salts HC	6%	4%	5%	4%		2%	2%	2%	2%			
10	+ DexCom	208%	5%	181%	3%		229%	0%	211%	0%			
11	+ Convatec HC	7%	3%	1%	3%		6%	3%	1%	3%			
12	+ Becton Dickinson & Co.	5%	3%	2%	3%		3%	3%	1%	3%			
13	+ Scope Ophthalmics	10%	2%	15%	2%		10%	7%	15%	7%			
14	+ Dansac	-12%	2%	3%	2%		-15%	1%	1%	1%			
15	+ 3M IE	25%	2%	49%	2%		21%	3%	20%	3%			
16	+ Novo Nordisk	0%	2%	-3%	2%		-1%	2%	-4%	2%			
17	+ C.R. Bard	-2%	2%	7%	2%		5%	4%	8%	4%			
18	+ Eakin	10%	1%	16%	1%		14%	1%	23%	1%			
19	+ Alliance Pharma	1%	1%	-1%	1%		6%	1%	1%	1%			
20	+ Medicon IE	-7%	1%	-8%	1%		6%	1%	2%	1%			
21	+ Smith & Nephew	6%	1%	-1%	1%		-19%	2%	-4%	3%			
22	+ Lab Thea	12%	1%	27%	1%		12%	2%	29%	2%			
23	+ Nutricia MD	-49%	1%	-41%	1%		28%	0%	-3%	0%			
24	+ Premier MD	-46%	1%	-28%	1%		-41%	0%	-23%	0%			
25	+ Clonmel HC	-9%	1%	-11%	1%		-16%	1%	-9%	1%			

MANUFACTURER ANALYSIS

SUPPLEMENTS (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		October 2020		MAT October 2020		Last 12 Months	October 2020		MAT October 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	-4%		4%			9%		6%		
1	+ Bio-oil research	5%	31%	4%	29%		5%	11%	4%	10%	
2	+ Sona Nut	6%	15%	-1%	14%		7%	28%	0%	28%	
3	+ MacuVision EU	12%	7%	2%	7%		10%	5%	2%	5%	
4	+ PrecisionBiotics	14%	6%	13%	5%		19%	3%	17%	3%	
5	+ BBI HC	-10%	4%	26%	4%		-10%	5%	1%	5%	
6	+ PharmaSource	-53%	3%	-24%	4%		-41%	1%	-13%	2%	
7	+ QM Specials	0%	3%	-11%	3%		32%	2%	0%	1%	
8	+ Medisource	-79%	1%	-26%	3%		-57%	1%	-29%	2%	
9	+ Pfizer HC	24%	3%	12%	3%		23%	8%	12%	7%	
10	+ Scope Hc	43%	3%	25%	3%		47%	6%	25%	5%	
11	+ Kelkin	17%	3%	116%	3%		32%	4%	-4%	3%	
12	+ Bausch & Lomb	6%	2%	4%	2%		6%	3%	5%	3%	
13	+ Pharma Nord	3%	2%	-7%	2%		-5%	2%	-11%	2%	
14	+ Lamberts HC	-24%	1%	49%	1%		-27%	0%	109%	1%	
15	+ Mylan	3%	2%	-3%	1%		4%	1%	-1%	1%	
16	+ Elements	-24%	1%	-37%	1%		-28%	0%	-35%	0%	
17	+ Natures Aid	42%	1%	7%	1%		36%	2%	0%	2%	
18	+ Rowa	97%	1%	123%	1%		97%	4%	122%	3%	
19	+ Solvotrin Therapeutics	41%	1%	66%	1%		42%	1%	66%	1%	
20	+ Seven Seas	23%	1%	40%	1%		5%	2%	23%	2%	
21	+ Greenlight Supplements	-31%	1%	38%	1%		-26%	0%	34%	0%	
22	+ Vitabiotics	0%	0%	-15%	1%		2%	1%	-8%	1%	
23	+ Scope Ophthalmics	-26%	1%	49%	1%		-9%	1%	69%	1%	
24	+ Flora Manuf & Distr	93%	0%	11%	0%		82%	0%	9%	0%	
25	+ A Nelson & Co	22%	1%	3%	0%		42%	1%	17%	1%	



Knowledge for better health

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