

Prescription Market Trends

Pharmacy channel (Ireland)

DECEMBER 2020



MAIN MARKET TRENDS

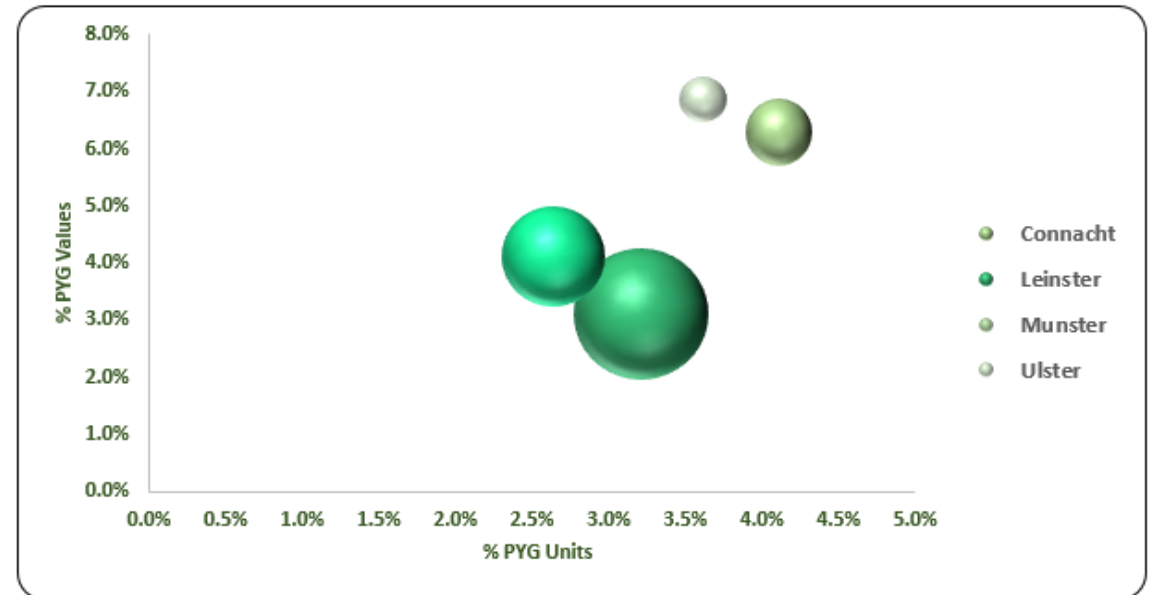
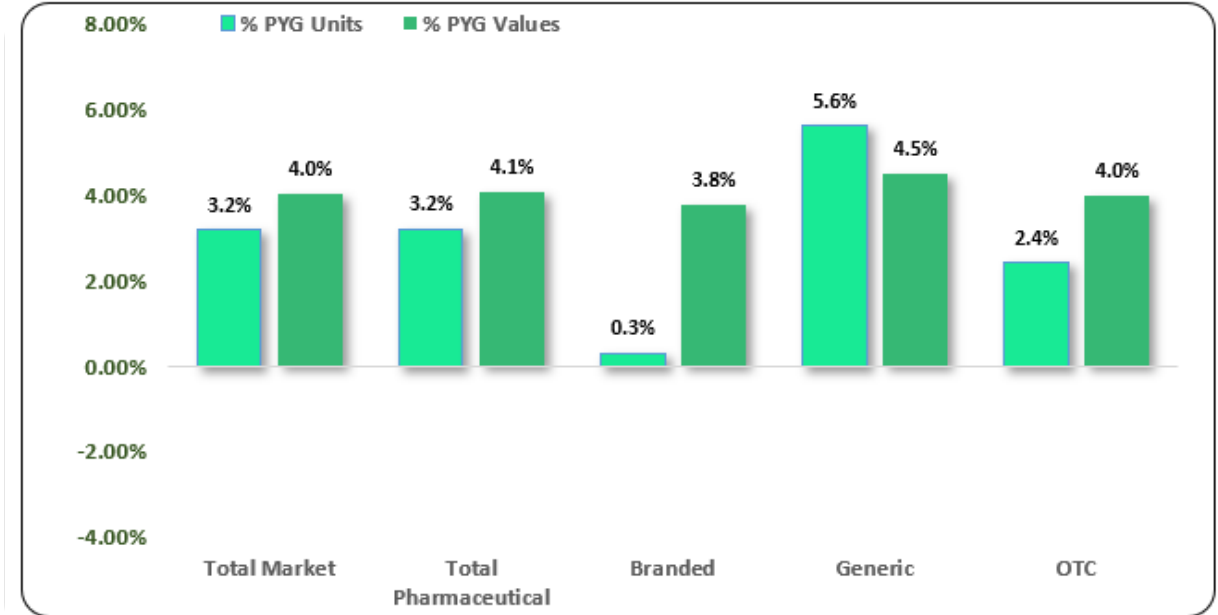
MAT December 2020 VS MAT December 2019

The **Irish Prescription** market, in the last MAT, grew 4.0% in value and 3.2% in units.

The main driver of the value growth are the innovative brands at 3.8%. Generic sees an increase of 4.5%, while the OTC sees an increase in value of 4.0%.

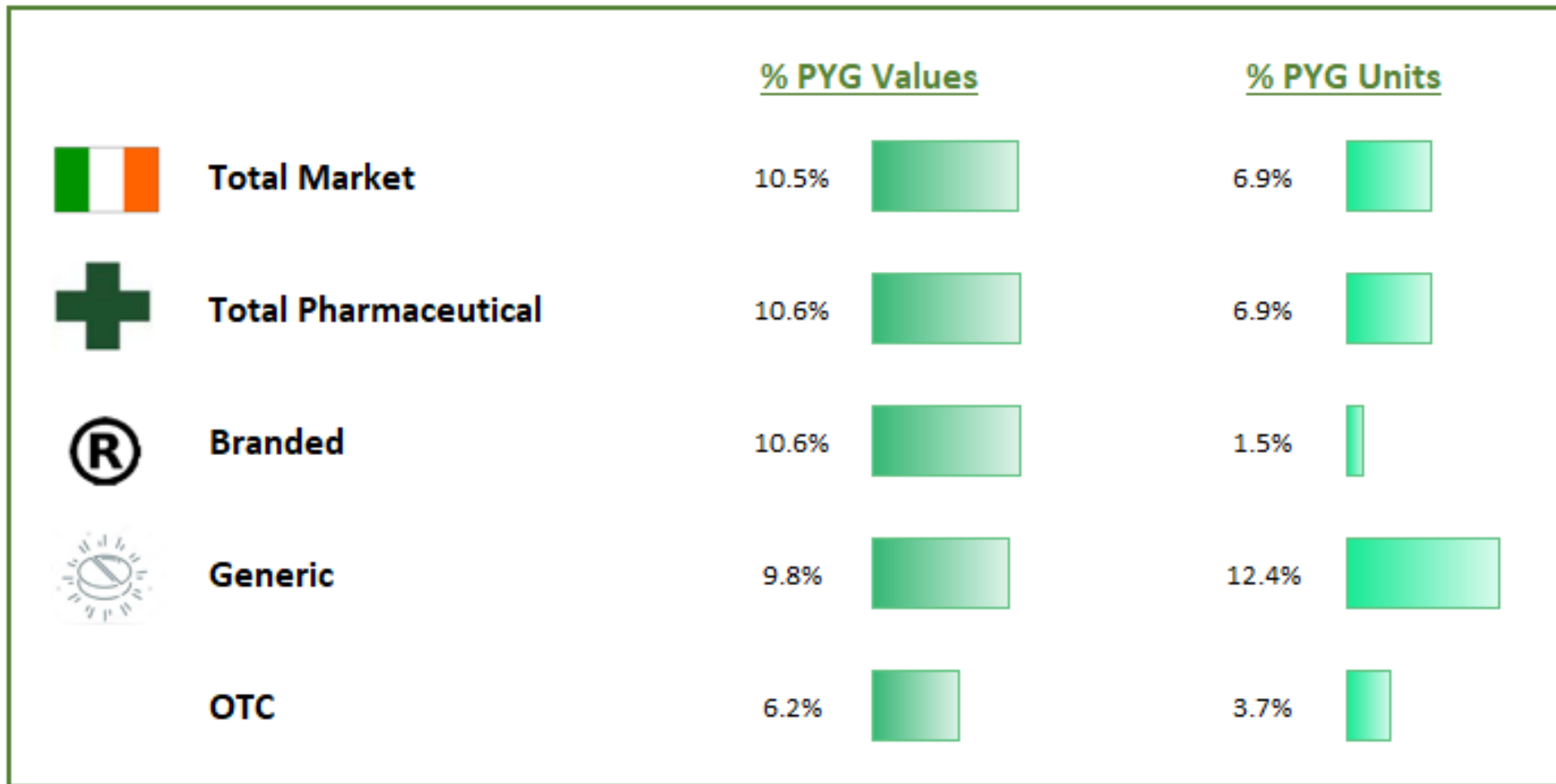
In units Generic medicines had an increase of 5.6%, Branded of 0.3% and OTCs of 2.4%.

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



MARKET SEGMENT TRENDS

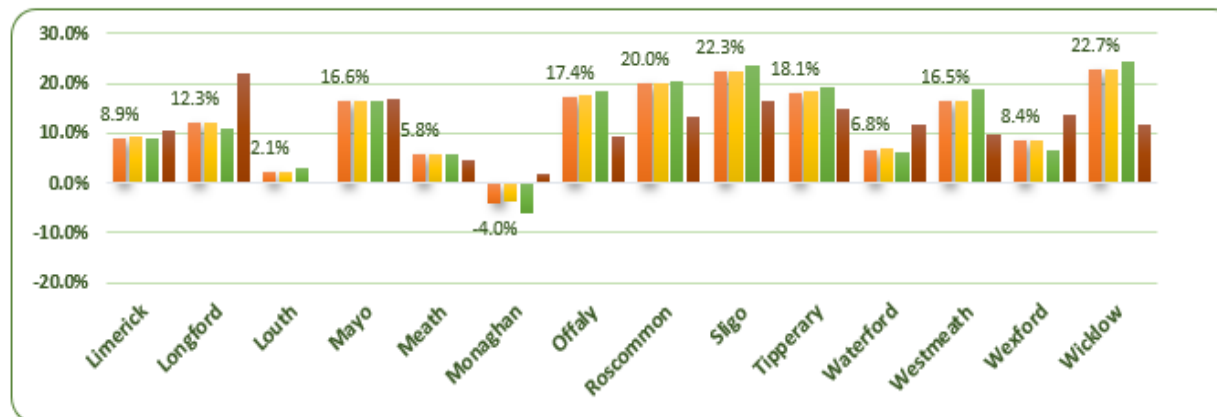
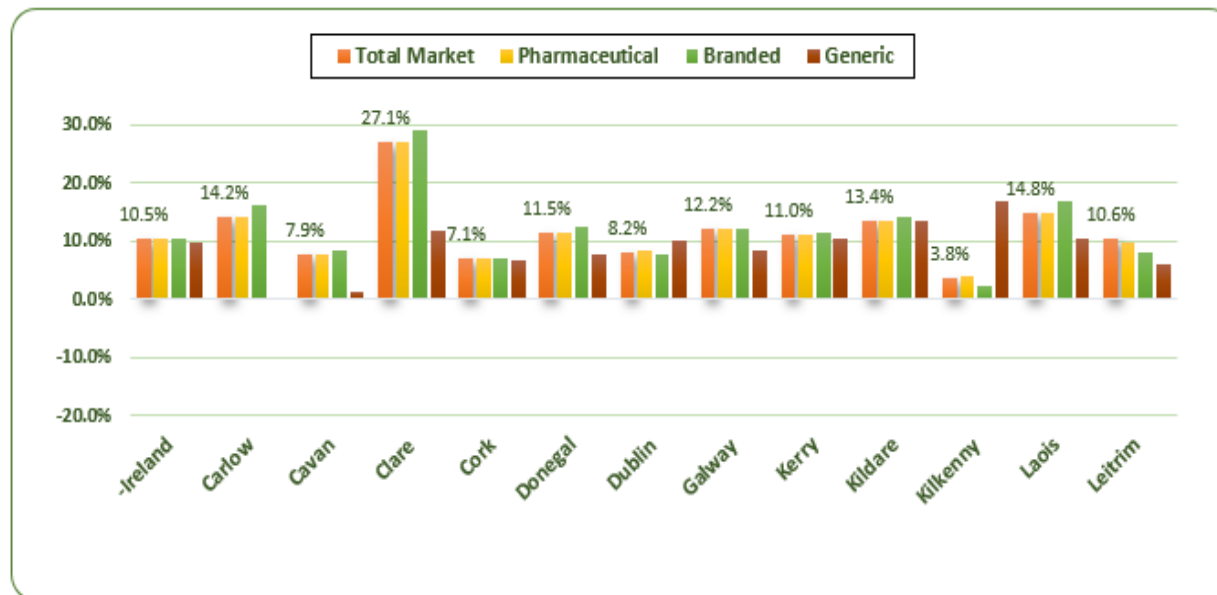
December 2020 VS December 2019



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

December 2020 VALUE VS December 2019 VALUE

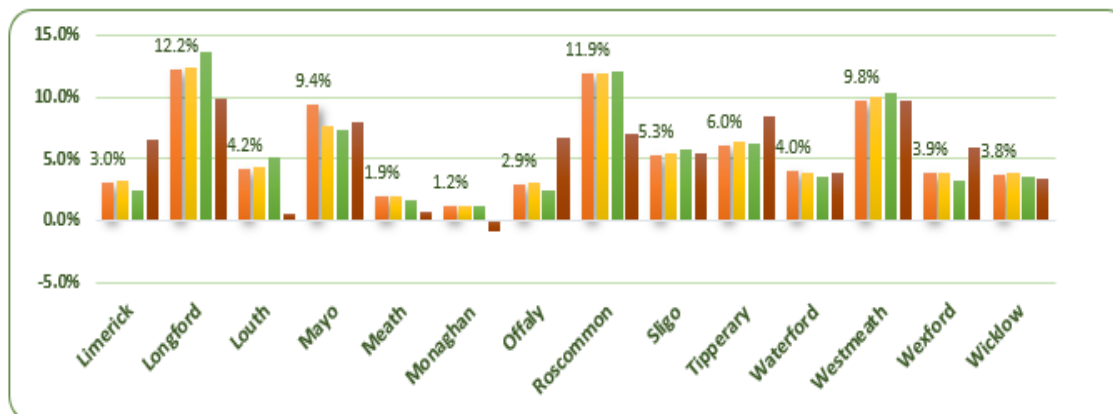
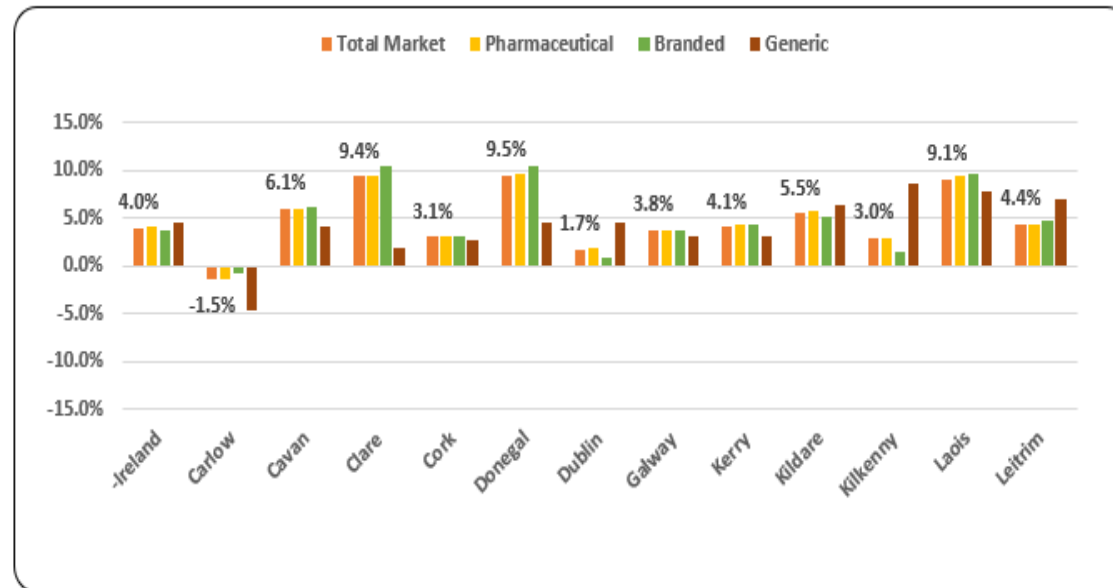
County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	10.5%	10.6%	10.6%	9.8%
Carlow	14.2%	14.2%	16.3%	0.2%
Cavan	7.9%	7.9%	8.6%	1.3%
Clare	27.1%	27.2%	29.1%	11.8%
Cork	7.1%	7.1%	6.9%	6.9%
Donegal	11.5%	11.6%	12.5%	7.6%
Dublin	8.2%	8.3%	7.9%	10.3%
Galway	12.2%	12.2%	12.2%	8.5%
Kerry	11.0%	11.1%	11.4%	10.4%
Kildare	13.4%	13.6%	14.1%	13.6%
Kilkenny	3.8%	4.0%	2.3%	17.0%
Laois	14.8%	14.9%	17.0%	10.5%
Leitrim	10.6%	9.7%	8.0%	6.2%
Limerick	8.9%	9.3%	9.0%	10.4%
Longford	12.3%	12.2%	11.1%	22.1%
Louth	2.1%	2.2%	2.9%	0.3%
Mayo	16.6%	16.7%	16.4%	17.1%
Meath	5.8%	5.9%	6.0%	4.8%
Monaghan	-4.0%	-3.9%	-6.1%	1.8%
Offaly	17.4%	17.6%	18.4%	9.3%
Roscommon	20.0%	20.0%	20.5%	13.2%
Sligo	22.3%	22.5%	23.6%	16.4%
Tipperary	18.1%	18.3%	19.1%	14.9%
Waterford	6.8%	6.8%	6.3%	11.7%
Westmeath	16.5%	16.6%	18.9%	9.7%
Wexford	8.4%	8.5%	6.7%	13.7%
Wicklow	22.7%	22.9%	24.5%	11.6%



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

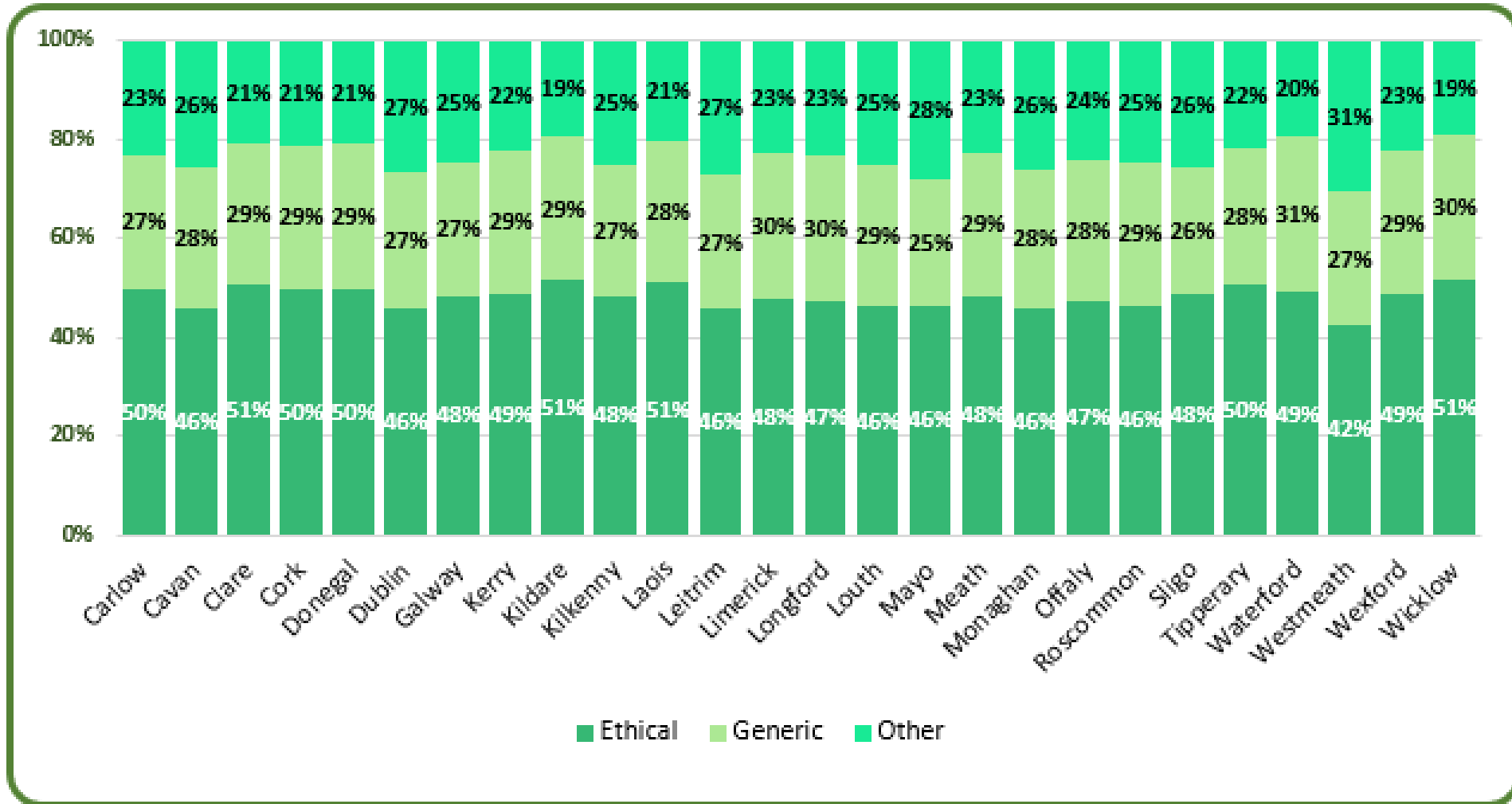
MAT December 2020 VALUE VS MAT December VALUE

County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	4.0%	4.1%	3.8%	4.5%
Carlow	-1.5%	-1.3%	-0.7%	-4.6%
Cavan	6.1%	6.1%	6.1%	4.2%
Clare	9.4%	9.5%	10.5%	1.9%
Cork	3.1%	3.1%	3.1%	2.6%
Donegal	9.5%	9.6%	10.5%	4.5%
Dublin	1.7%	1.9%	0.9%	4.6%
Galway	3.8%	3.8%	3.8%	3.1%
Kerry	4.1%	4.3%	4.4%	3.2%
Kildare	5.5%	5.7%	5.2%	6.4%
Kilkenny	3.0%	2.9%	1.5%	8.7%
Laois	9.1%	9.4%	9.7%	7.8%
Leitrim	4.4%	4.4%	4.8%	6.9%
Limerick	3.0%	3.3%	2.5%	6.5%
Longford	12.2%	12.4%	13.7%	9.9%
Louth	4.2%	4.4%	5.2%	0.5%
Mayo	9.4%	7.7%	7.4%	8.0%
Meath	1.9%	2.0%	1.7%	0.6%
Monaghan	1.2%	1.2%	1.2%	-0.8%
Offaly	2.9%	3.1%	2.4%	6.7%
Roscommon	11.9%	11.9%	12.1%	7.0%
Sligo	5.3%	5.4%	5.7%	5.4%
Tipperary	6.0%	6.3%	6.2%	8.4%
Waterford	4.0%	3.9%	3.6%	3.9%
Westmeath	9.8%	10.1%	10.4%	9.7%
Wexford	3.9%	3.9%	3.2%	5.9%
Wicklow	3.8%	3.9%	3.6%	3.5%



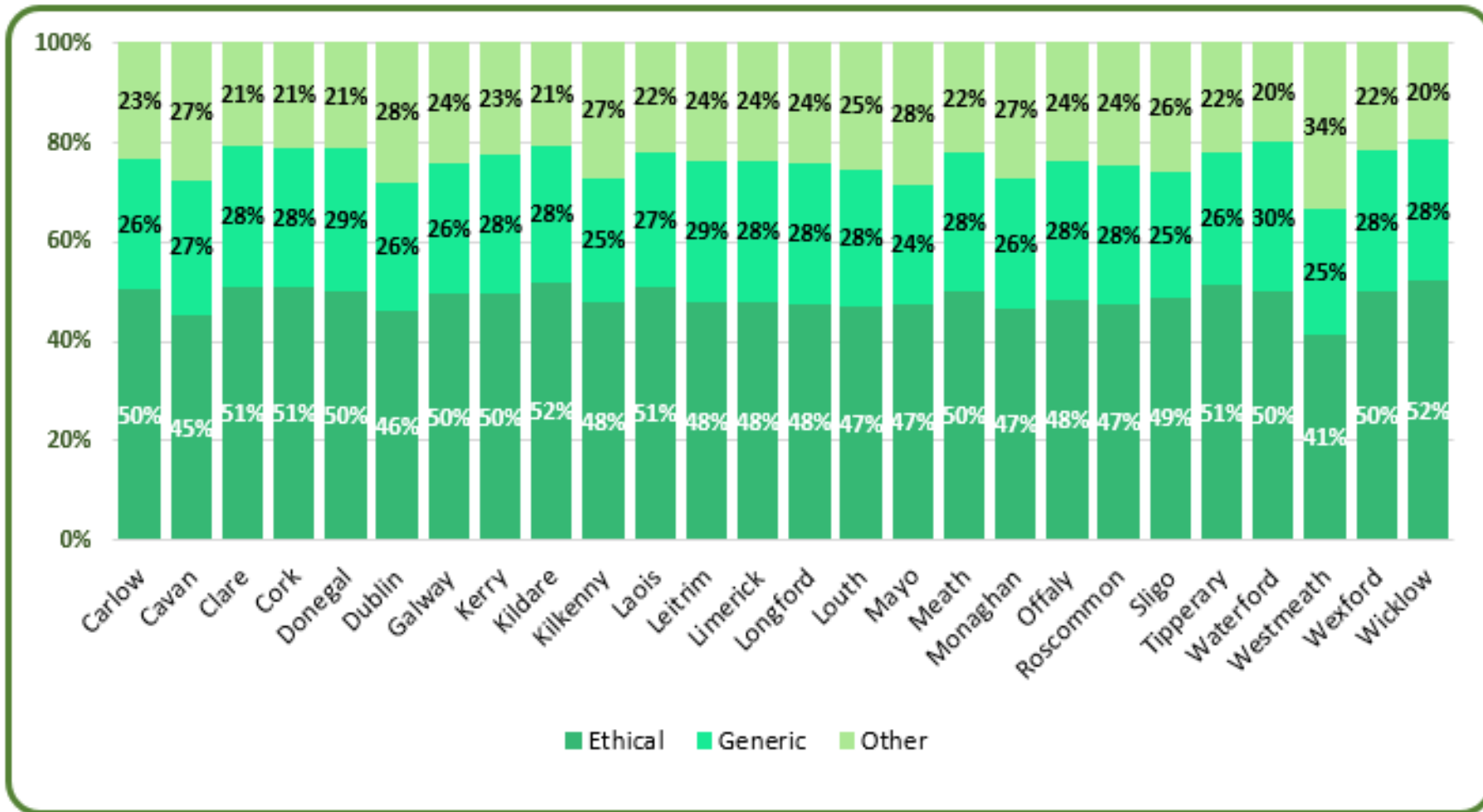
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN December 2020



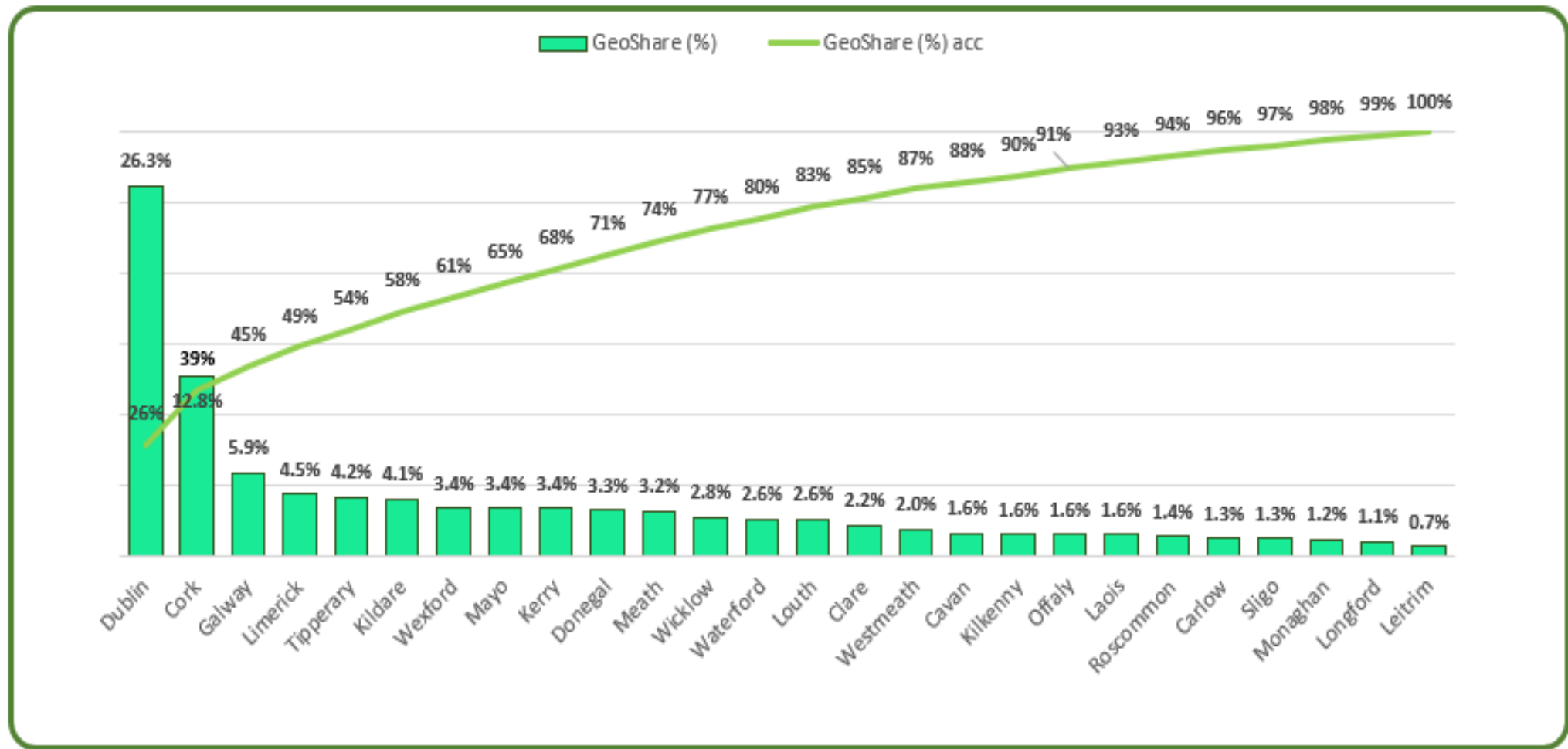
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN MAT December 2020



GEOGRAPHICAL SHARE BY COUNTY

December 2020 MAT VALUE



MANUFACTURER ANALYSIS

TOTAL MARKET

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	11%		4%			7%		3%		
1	+ Vertex Pharma UK	54%	8%	11%	6%		57%	0%	15%	0%	
2	+ Janssen-Cilag	14%	6%	10%	6%		1%	1%	-13%	1%	
3	+ Novartis	6%	6%	3%	6%		4%	1%	-3%	1%	
4	+ Pfizer AG	-20%	4%	-22%	4%		-4%	2%	-3%	2%	
5	+ Teva Pharma Ind	4%	4%	-1%	4%		4%	9%	0%	9%	
6	+ Amgen	50%	4%	36%	4%		30%	0%	19%	0%	
7	+ GlaxoSmithKline IE	-2%	4%	2%	4%		-11%	4%	-4%	4%	
8	+ Abbvie	-31%	3%	-32%	4%		-33%	0%	-33%	0%	
9	+ Celgene EU	7%	3%	10%	3%		9%	0%	7%	0%	
10	+ MSD	-3%	2%	-14%	3%		5%	1%	-1%	1%	
11	+ Biogen Idec	63%	3%	102%	2%		66%	0%	108%	0%	
12	+ Bristol-Myers Squibb	24%	2%	20%	2%		25%	1%	21%	0%	
13	+ AstraZeneca Pharma	25%	3%	13%	2%		10%	1%	6%	1%	
14	+ Novo Nordisk	13%	2%	9%	2%		9%	1%	4%	1%	
15	+ Mylan	29%	2%	12%	2%		0%	4%	-1%	4%	
16	+ Accord HC	25%	2%	20%	2%		30%	9%	16%	8%	
17	+ Roche	6%	2%	7%	2%		-25%	0%	-1%	0%	
18	+ Clonmel HC	9%	2%	2%	2%		10%	8%	2%	8%	
19	+ Boehringer Ingelheim	11%	2%	7%	2%		9%	1%	5%	1%	
20	+ Bayer AG	-9%	2%	-8%	2%		-4%	1%	-7%	1%	
21	+ Sanofi	5%	2%	3%	2%		9%	3%	9%	3%	
22	+ Astellas	10%	2%	4%	2%		8%	0%	1%	0%	
23	+ Takeda IE	12%	1%	16%	1%		14%	1%	8%	1%	
24	+ Nutricia MD	9%	1%	5%	1%		18%	8%	14%	9%	
25	+ Merck	3%	1%	18%	1%		2%	0%	-13%	0%	

MANUFACTURER ANALYSIS

PHARMACEUTICAL

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	11%		4%			7%		3%		
1	+ Vertex Pharma UK	54%	8%	11%	7%		57%	0%	15%	0%	
2	+ Janssen-Cilag	14%	6%	10%	6%		1%	1%	-13%	1%	
3	+ Novartis	6%	6%	3%	6%		4%	1%	-3%	1%	
4	+ Pfizer AG	-20%	4%	-22%	4%		-4%	2%	-3%	2%	
5	+ Teva Pharma Ind	4%	4%	-1%	4%		4%	9%	0%	9%	
6	+ Amgen	50%	4%	36%	4%		30%	0%	19%	0%	
7	+ GlaxoSmithKline IE	-2%	4%	2%	4%		-11%	4%	-4%	4%	
8	+ Abbvie	-31%	3%	-32%	4%		-33%	0%	-33%	0%	
9	+ Celgene EU	7%	3%	10%	3%		9%	0%	7%	0%	
10	+ MSD	-3%	2%	-14%	3%		5%	1%	-1%	1%	
11	+ Biogen Idec	63%	3%	102%	2%		66%	0%	108%	0%	
12	+ Bristol-Myers Squibb	24%	2%	20%	2%		25%	1%	21%	0%	
13	+ AstraZeneca Pharma	25%	3%	13%	2%		10%	1%	6%	1%	
14	+ Novo Nordisk	13%	2%	9%	2%		9%	1%	4%	1%	
15	+ Mylan	29%	2%	12%	2%		0%	4%	-1%	4%	
16	+ Accord HC	25%	2%	20%	2%		30%	9%	16%	8%	
17	+ Roche	6%	2%	7%	2%		-25%	0%	-1%	0%	
18	+ Clonmel HC	9%	2%	3%	2%		9%	8%	3%	8%	
19	+ Boehringer Ingelheim	11%	2%	7%	2%		9%	1%	5%	1%	
20	+ Bayer AG	-9%	2%	-8%	2%		-4%	1%	-7%	1%	
21	+ Sanofi	5%	2%	3%	2%		9%	3%	9%	3%	
22	+ Astellas	10%	2%	4%	2%		8%	0%	1%	0%	
23	+ Takeda IE	12%	1%	16%	1%		14%	1%	8%	1%	
24	+ Merck	3%	1%	18%	1%		2%	0%	-13%	0%	
25	+ Rowa	-6%	1%	-2%	1%		-5%	4%	0%	5%	

MANUFACTURER ANALYSIS

ETHICAL

Rank	Manufacturer	Values						Units					
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months		
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)			
	Total	11%		4%			5%		2%				
1	+ Vertex Pharma UK	54%	9%	11%	7%		57%	0%	15%	0%			
2	+ Janssen-Cilag	14%	7%	10%	7%		1%	1%	-13%	1%			
3	+ Novartis	6%	6%	3%	7%		4%	2%	-3%	2%			
4	+ Pfizer AG	-20%	4%	-22%	5%		-4%	3%	-3%	3%			
5	+ Amgen	50%	5%	36%	4%		30%	0%	19%	0%			
6	+ GlaxoSmithKline IE	-2%	4%	2%	4%		-11%	6%	-4%	6%			
7	+ Abbvie	-31%	3%	-32%	4%		-33%	0%	-33%	0%			
8	+ Celgene EU	7%	3%	10%	3%		9%	0%	7%	0%			
9	+ MSD	-3%	3%	-14%	3%		5%	2%	-1%	2%			
10	+ Biogen Idec	63%	3%	102%	3%		66%	0%	108%	0%			
11	+ Bristol-Myers Squibb	24%	3%	20%	3%		25%	1%	21%	1%			
12	+ AstraZeneca Pharma	25%	3%	13%	3%		10%	2%	6%	2%			
13	+ Novo Nordisk	13%	3%	9%	2%		9%	1%	4%	1%			
14	+ Roche	6%	2%	7%	2%		-25%	0%	-1%	0%			
15	+ Boehringer Ingelheim	11%	2%	7%	2%		9%	1%	5%	1%			
16	+ Bayer AG	-9%	2%	-8%	2%		-4%	2%	-7%	2%			
17	+ Sanofi	5%	2%	3%	2%		9%	5%	9%	4%			
18	+ Astellas	10%	2%	4%	2%		8%	1%	1%	1%			
19	+ Mylan	31%	2%	10%	2%		0%	3%	-5%	3%			
20	+ Teva Pharma Ind	0%	2%	-2%	2%		-9%	3%	2%	3%			
21	+ Takeda IE	12%	1%	16%	2%		14%	1%	8%	1%			
22	+ Nutricia MD	13%	1%	5%	2%		18%	12%	14%	12%			
23	+ Merck	3%	1%	18%	2%		2%	0%	-13%	0%			
24	+ UCB Pharma IE	11%	1%	7%	1%		6%	1%	3%	1%			
25	+ ULM Manuf	37%	2%	23%	1%		20%	2%	16%	2%			

MANUFACTURER ANALYSIS

GENERIC

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	10%		5%			12%		6%		
1	+ Teva Pharma Ind	7%	25%	-1%	25%		8%	26%	-1%	26%	
2	+ Accord HC	26%	23%	19%	22%		38%	24%	22%	22%	
3	+ Clonmel HC	30%	12%	9%	12%		36%	13%	10%	12%	
4	+ Rowa	-6%	10%	0%	11%		-5%	11%	2%	12%	
5	+ Krka Pharma	6%	8%	-10%	8%		6%	7%	-6%	8%	
6	+ Pinewood	-3%	6%	8%	6%		-6%	5%	9%	5%	
7	+ Mylan	19%	5%	21%	5%		1%	4%	8%	5%	
8	+ Bluefish	38%	3%	62%	3%		20%	4%	41%	4%	
9	+ Wockhardt	2%	2%	31%	2%		12%	2%	38%	2%	
10	+ Actavis Group	-56%	1%	-54%	1%		-41%	1%	-49%	2%	
11	+ Fannin	-48%	1%	-38%	1%		-59%	1%	-51%	1%	
12	+ Consilient Health	52%	0%	42%	0%		42%	0%	60%	0%	
13	+ Tillomed Lab	6%	0%	1%	0%		6%	0%	1%	0%	
14	+ Galen	23%	0%	-18%	0%		25%	0%	-15%	0%	
15	+ Azure Pharmaceuticals	39290%	0%	181956%	0%		92192%	0%	397295%	0%	
16	+ Rosemont Pharma	30%	0%	13%	0%		27%	0%	-24%	0%	
17	+ Phoenix Lab	7%	0%	11%	0%		7%	0%	11%	0%	
18	+ Pharmathen	34%	0%	25%	0%		34%	0%	25%	0%	
19	+ Aribamed	36%	0%	28%	0%		33%	0%	44%	0%	
20	+ Orion Corp	18%	0%	14%	0%		13%	0%	10%	0%	
21	+ Bristol Lab	81799%	0%	128174%	0%		82390%	0%	132437%	0%	
22	+ RPH Pharma	-73%	0%	-49%	0%		-73%	0%	-49%	0%	
23	+ Advanz Pharma IE	40%	0%	9%	0%		43%	0%	7%	0%	
24	+ Ranbaxy IE	-48%	0%	-29%	0%		-56%	0%	-35%	0%	
25	+ G.L. Pharma	322%	0%	1666%	0%		322%	0%	1666%	0%	

MANUFACTURER ANALYSIS

OTC (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	6%		4%			4%		2%		
1	+ Johnson & Johnson	11%	23%	6%	24%		15%	10%	5%	10%	
2	+ Takeda IE	14%	20%	7%	19%		15%	19%	8%	19%	
3	+ Reckitt Benckiser IE	12%	11%	7%	10%		10%	14%	5%	13%	
4	+ Bausch & Lomb	0%	6%	-6%	6%		1%	8%	-5%	8%	
5	+ Rowa	127%	8%	75%	6%		138%	11%	82%	7%	
6	+ Clonmel HC	13%	5%	6%	5%		15%	12%	5%	12%	
7	+ Fannin	8%	4%	4%	4%		9%	3%	4%	3%	
8	+ HRA Pharma	-9%	3%	-5%	3%		-9%	1%	-5%	1%	
9	+ Pfizer HC	11%	3%	8%	3%		11%	2%	8%	2%	
10	+ Perrigo Co.	10%	2%	-1%	3%		1%	1%	-2%	1%	
11	+ Sanofi	5%	2%	7%	2%		4%	4%	0%	4%	
12	+ Phoenix Lab	-50%	2%	-23%	2%		-51%	4%	-23%	4%	
13	+ Allergan IE	2%	2%	-7%	2%		-2%	2%	-5%	2%	
14	+ Pinewood	-58%	1%	-28%	2%		-53%	2%	-26%	3%	
15	+ GlaxoSmithKline IE	12%	1%	3%	1%		6%	1%	1%	2%	
16	+ Mylan	-70%	1%	-28%	1%		-88%	0%	-34%	3%	
17	+ GlaxoSmithKline HC	-3%	1%	-3%	1%		-15%	0%	-15%	1%	
18	+ Ricstele Manuf	-32%	1%	-2%	1%		-35%	1%	-6%	1%	
19	+ RPH Pharma	12%	0%	3%	0%		12%	0%	-1%	0%	
20	+ Novartis	1%	0%	-2%	0%		1%	1%	-2%	1%	
21	+ Bayer AG	63%	0%	9%	0%		70%	1%	7%	0%	
22	+ Teofarma	36%	0%	-6%	0%		32%	0%	2%	0%	
23	+ PCO Manuf	-60%	0%	-12%	0%		-58%	0%	-13%	0%	
24	+ Teva Pharma Ind	6%	0%	2%	0%		-1%	0%	8%	0%	
25	+ Lab Casen-fleet	-1%	0%	16%	0%		-1%	0%	16%	0%	

MANUFACTURER ANALYSIS

PATIENT CARE (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	10%		6%			10%		4%		
1	+ Coloplast UK	13%	12%	5%	12%		17%	6%	10%	5%	
2	+ Medtronic Minimed	13%	9%	16%	9%		13%	2%	13%	2%	
3	+ Ascensia Diabetes Care IE	10%	9%	6%	9%		10%	9%	6%	9%	
4	+ Abbott Diabetes Care	-12%	8%	-9%	9%		-5%	6%	-7%	7%	
5	+ LifeScan	16%	7%	9%	7%		17%	7%	9%	7%	
6	+ Roche Diabetes Care	-4%	6%	-6%	7%		-4%	6%	-5%	6%	
7	+ Hollister	6%	6%	6%	6%		8%	2%	6%	2%	
8	+ B. Braun MD	11%	4%	7%	4%		12%	1%	9%	1%	
9	+ DexCom	218%	6%	195%	4%		205%	1%	215%	0%	
10	+ Salts HC	12%	4%	6%	4%		9%	2%	3%	2%	
11	+ Convatec HC	15%	3%	5%	3%		23%	4%	6%	3%	
12	+ Becton Dickinson & Co.	9%	3%	3%	3%		11%	3%	2%	3%	
13	+ Scope Ophthalmics	19%	2%	14%	2%		18%	7%	14%	7%	
14	+ 3M IE	24%	2%	46%	2%		21%	3%	22%	3%	
15	+ Dansac	-3%	2%	0%	2%		-4%	1%	-2%	1%	
16	+ Novo Nordisk	1%	2%	-3%	2%		0%	2%	-3%	2%	
17	+ C.R. Bard	-1%	2%	6%	2%		7%	4%	8%	4%	
18	+ Eakin	-6%	1%	11%	1%		-4%	1%	18%	1%	
19	+ Alliance Pharma	5%	1%	1%	1%		8%	1%	2%	1%	
20	+ Medicon IE	-6%	1%	-6%	1%		8%	1%	5%	1%	
21	+ Smith & Nephew	18%	1%	5%	1%		43%	3%	1%	3%	
22	+ Lab Thea	27%	1%	24%	1%		27%	2%	25%	2%	
23	+ Clonmel HC	3%	1%	-9%	1%		27%	2%	-7%	1%	
24	+ Premier MD	-21%	0%	-31%	1%		-28%	0%	-27%	0%	
25	+ Nutricia MD	-61%	0%	-48%	1%		-16%	0%	1%	0%	

MANUFACTURER ANALYSIS

SUPPLEMENTS (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		December 2020		MAT December 2020		Last 12 Months	December 2020		MAT December 2020		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	3%		4%			10%		9%		
1	+ Bio-oil research	14%	30%	5%	29%		14%	11%	5%	10%	
2	+ Sona Nut	10%	15%	3%	15%		8%	27%	4%	28%	
3	+ MacuVision EU	-3%	6%	6%	7%		-4%	5%	5%	5%	
4	+ PrecisionBiotics	4%	5%	13%	5%		9%	3%	17%	3%	
5	+ BBI HC	13%	5%	19%	4%		13%	5%	1%	5%	
6	+ PharmaSource	-57%	2%	-40%	3%		-42%	1%	-27%	1%	
7	+ QM Specials	15%	5%	-14%	3%		25%	2%	2%	1%	
8	+ Scope Hc	37%	3%	33%	3%		36%	6%	32%	5%	
9	+ Pfizer HC	19%	3%	17%	3%		17%	8%	15%	8%	
10	+ Kelkin	20%	3%	76%	3%		5%	3%	-1%	3%	
11	+ Medisource	-77%	1%	-32%	3%		-63%	1%	-38%	1%	
12	+ Bausch & Lomb	-7%	2%	8%	2%		-7%	2%	8%	3%	
13	+ Pharma Nord	3%	2%	-5%	2%		-8%	1%	-10%	2%	
14	+ Mylan	17%	2%	4%	1%		18%	1%	6%	1%	
15	+ Lamberts HC	-9%	1%	47%	1%		-1%	0%	107%	1%	
16	+ Elements	-6%	1%	-32%	1%		-23%	0%	-32%	0%	
17	+ Natures Aid	57%	1%	21%	1%		53%	3%	14%	2%	
18	+ Rowa	67%	1%	134%	1%		67%	4%	134%	3%	
19	+ Solvotrin Therapeutics	97%	1%	64%	1%		96%	1%	64%	1%	
20	+ Seven Seas	-14%	1%	44%	1%		-21%	1%	26%	2%	
21	+ Vitabiotics	47%	1%	-7%	1%		39%	1%	-1%	1%	
22	+ Sanofi	116%	1%	63%	1%		120%	2%	64%	1%	
23	+ Greenlight Supplements	-52%	0%	19%	1%		-53%	0%	19%	0%	
24	+ Scope Ophthalmics	-13%	0%	22%	1%		-11%	1%	34%	1%	
25	+ Flora Manuf & Distr	-1%	1%	19%	0%		-2%	0%	16%	0%	



Knowledge for better health

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