

Prescription Market Trends

Pharmacy channel (Ireland)

Jan 2021



MAIN MARKET TRENDS

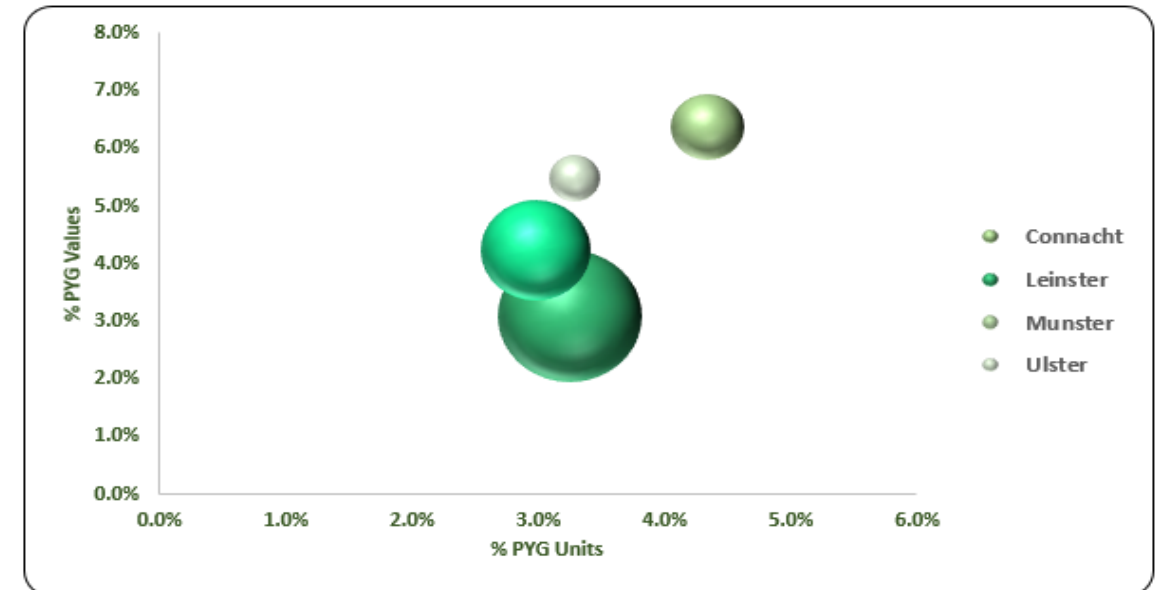
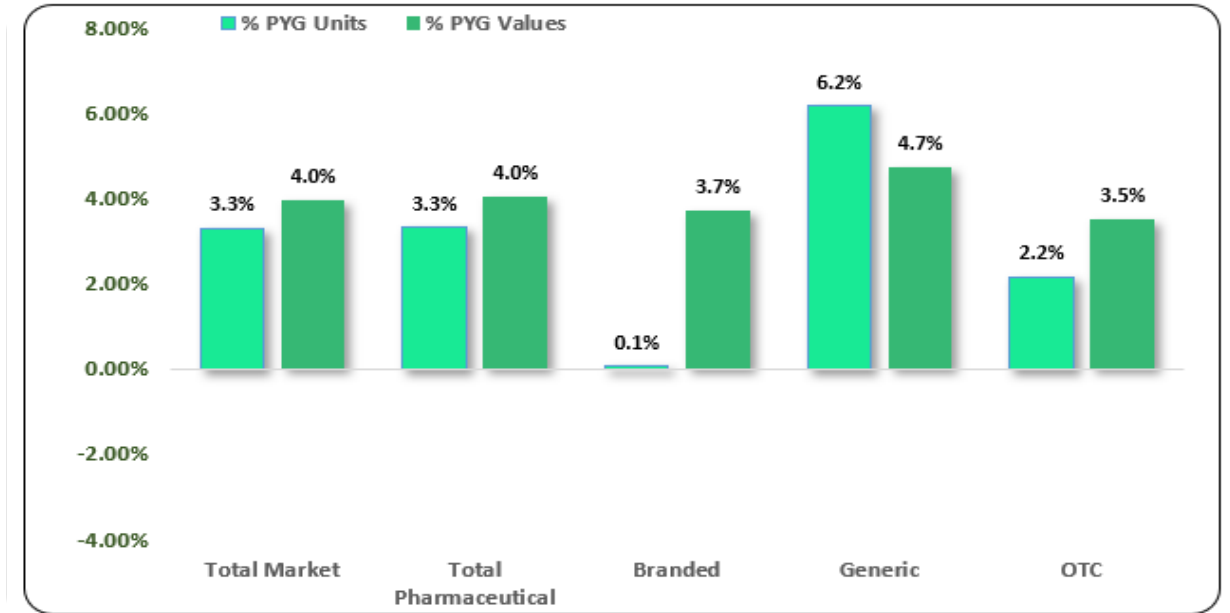
MAT January 2021 VS MAT January 2020

The **Irish Prescription** market, in the last MAT, grew 4.0% in value and 3.3% in units.

The main driver of the value growth are the innovative brands at 3.7%. Generic sees an increase of 4.7%, while the OTC sees an increase in value of 3.5%.

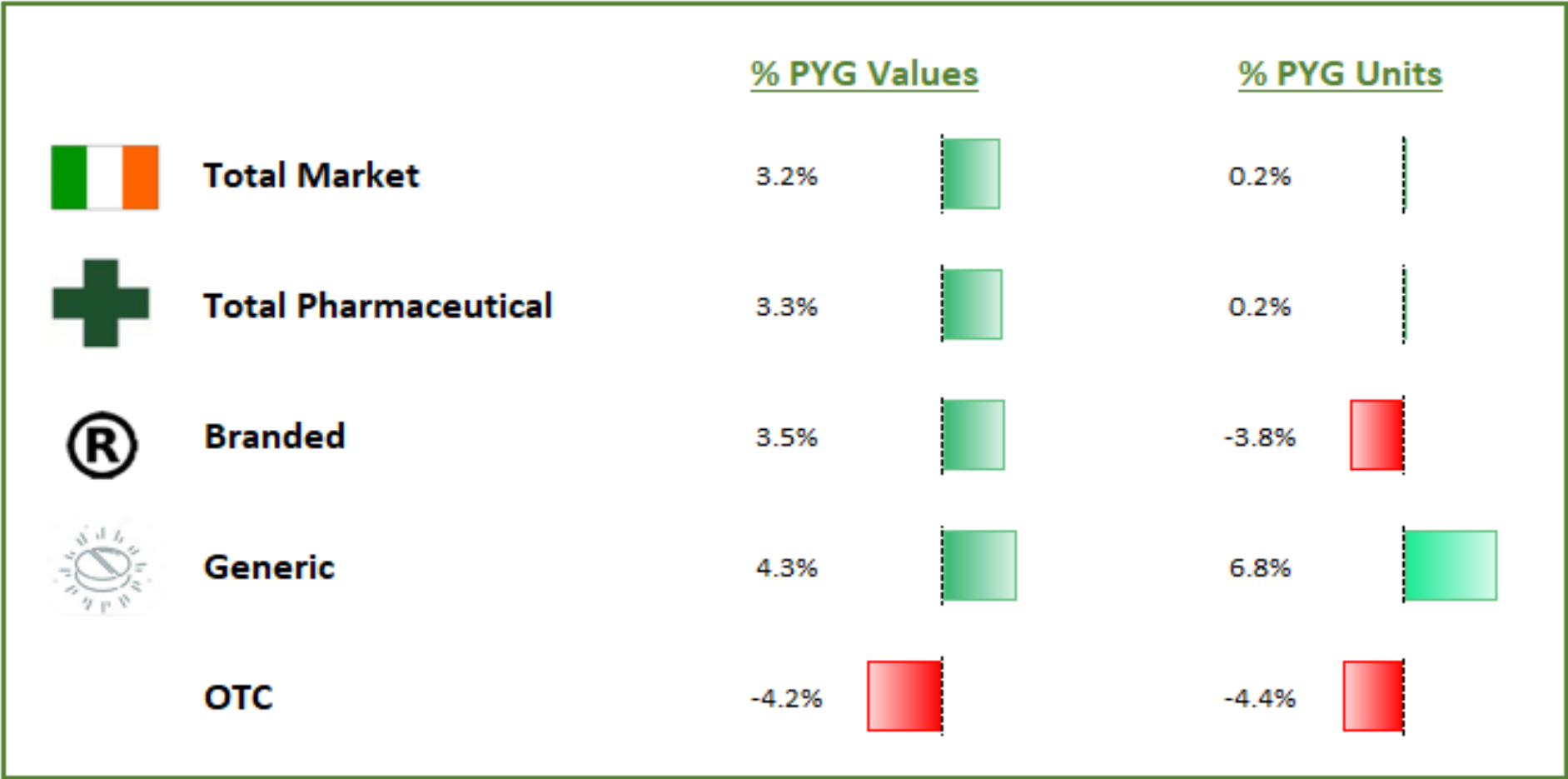
In units Generic medicines had an increase of 6.2%, Branded of 0.1% and OTCs of 2.2%.

In January Connacht has the highest PYG for Units and Values.



MARKET SEGMENT TRENDS

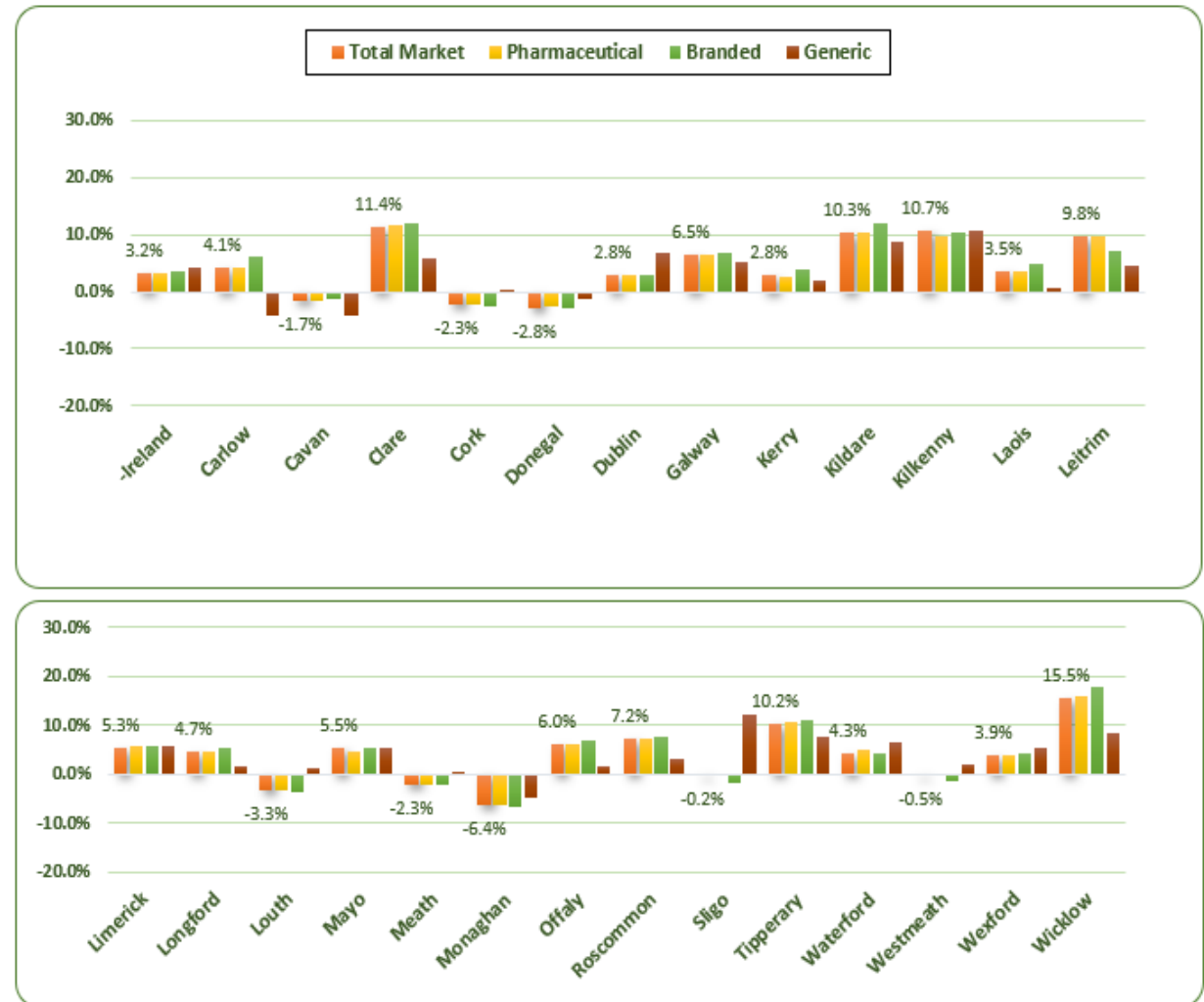
January 2021 VS January 2020



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

January 2021 VALUE VS January 2020 VALUE

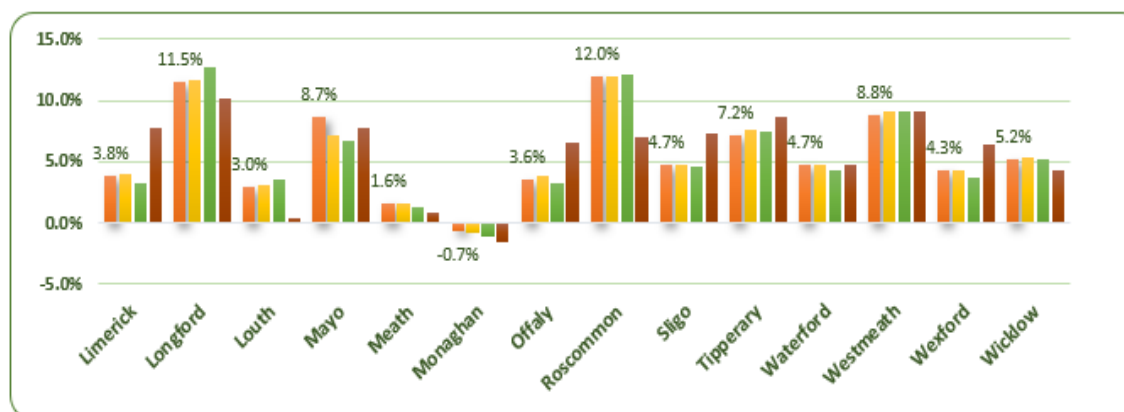
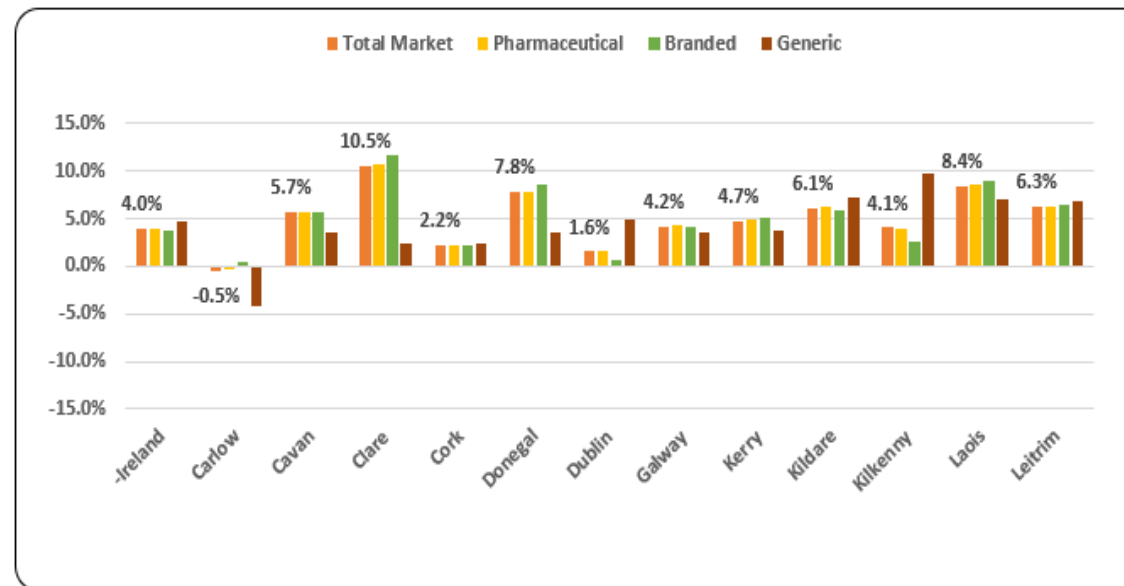
County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	3.2%	3.3%	3.5%	4.3%
Carlow	4.1%	4.2%	6.2%	-4.1%
Cavan	-1.7%	-1.6%	-1.3%	-4.2%
Clare	11.4%	11.6%	12.1%	5.8%
Cork	-2.3%	-2.1%	-2.4%	0.4%
Donegal	-2.8%	-2.7%	-2.9%	-1.4%
Dublin	2.8%	3.0%	2.8%	6.8%
Galway	6.5%	6.5%	6.8%	5.3%
Kerry	2.8%	2.8%	3.9%	1.9%
Kildare	10.3%	10.5%	12.1%	8.8%
Kilkenny	10.7%	9.6%	10.6%	10.8%
Laois	3.5%	3.6%	5.0%	0.5%
Leitrim	9.8%	9.6%	7.3%	4.7%
Limerick	5.3%	5.6%	5.7%	5.7%
Longford	4.7%	4.7%	5.4%	1.6%
Louth	-3.3%	-3.3%	-3.7%	1.3%
Mayo	5.5%	4.7%	5.2%	5.5%
Meath	-2.3%	-2.1%	-2.4%	0.4%
Monaghan	-6.4%	-6.5%	-6.7%	-5.0%
Offaly	6.0%	6.0%	7.0%	1.6%
Roscommon	7.2%	7.0%	7.8%	3.0%
Sligo	-0.2%	-0.2%	-1.9%	12.0%
Tipperary	10.2%	10.6%	11.0%	7.5%
Waterford	4.3%	4.8%	4.4%	6.3%
Westmeath	-0.5%	-0.4%	-1.4%	2.1%
Wexford	3.9%	4.0%	4.1%	5.4%
Wicklow	15.5%	15.9%	17.8%	8.3%



COUNTY PRESCRIPTION MARKET TREND BY SEGMENT

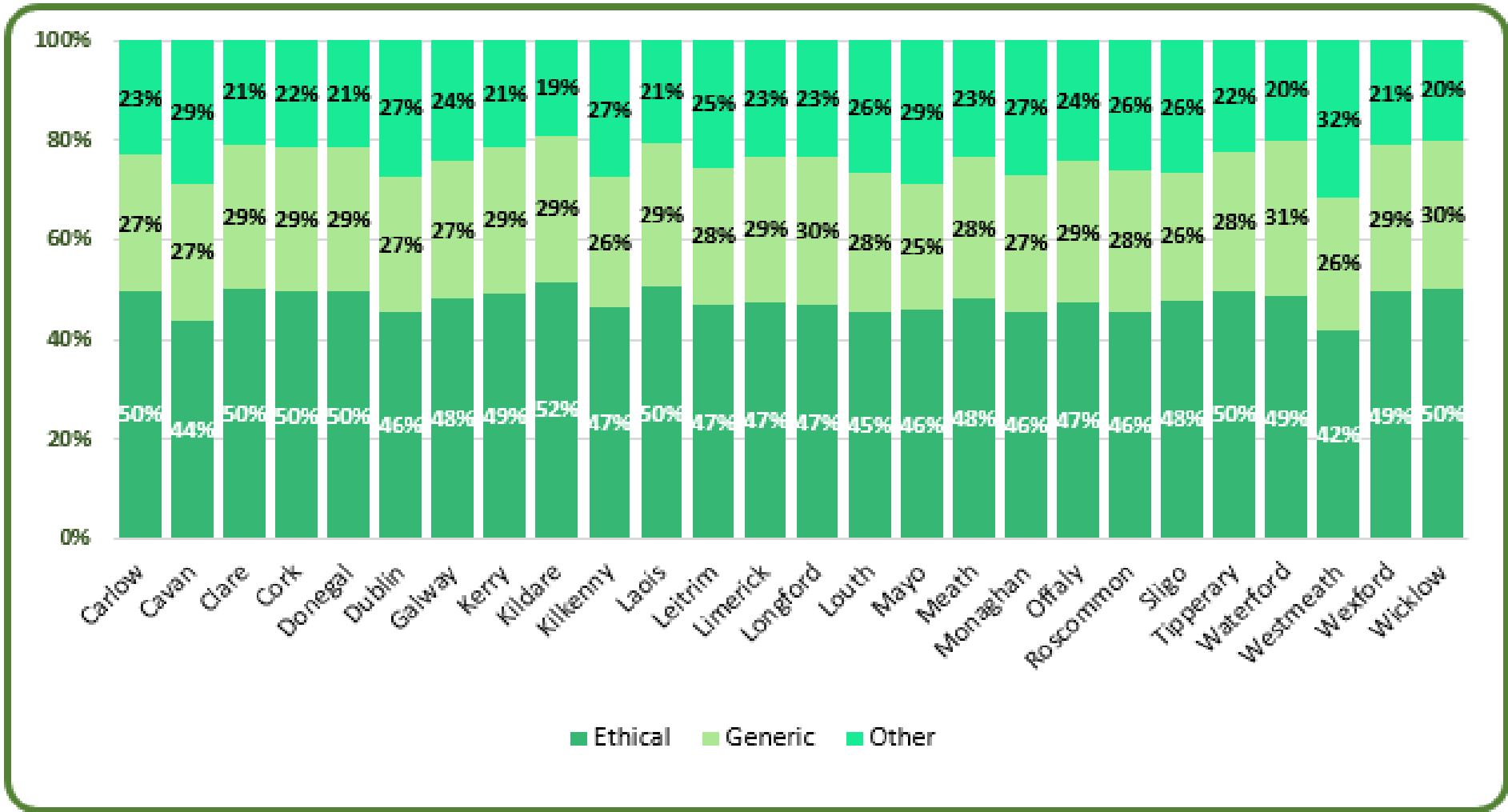
MAT January 2021 VALUE VS MAT January 2020 VALUE

County	Total Market	Pharmaceutical	Branded	Generic
-Ireland	4.0%	4.0%	3.7%	4.7%
Carlow	-0.5%	-0.3%	0.4%	-4.3%
Cavan	5.7%	5.7%	5.8%	3.7%
Clare	10.5%	10.7%	11.7%	2.4%
Cork	2.2%	2.3%	2.2%	2.4%
Donegal	7.8%	7.9%	8.6%	3.6%
Dublin	1.6%	1.7%	0.7%	4.9%
Galway	4.2%	4.3%	4.2%	3.5%
Kerry	4.7%	4.9%	5.2%	3.7%
Kildare	6.1%	6.3%	6.0%	7.2%
Kilkenny	4.1%	3.9%	2.6%	9.7%
Laois	8.4%	8.6%	8.9%	7.1%
Leitrim	6.3%	6.4%	6.6%	6.8%
Limerick	3.8%	4.1%	3.2%	7.7%
Longford	11.5%	11.6%	12.7%	10.2%
Louth	3.0%	3.1%	3.6%	0.5%
Mayo	8.7%	7.2%	6.7%	7.8%
Meath	1.6%	1.6%	1.3%	0.9%
Monaghan	-0.7%	-0.7%	-1.1%	-1.5%
Offaly	3.6%	3.8%	3.3%	6.5%
Roscommon	12.0%	12.0%	12.2%	7.1%
Sligo	4.7%	4.8%	4.7%	7.3%
Tipperary	7.2%	7.5%	7.4%	8.7%
Waterford	4.7%	4.7%	4.4%	4.8%
Westmeath	8.8%	9.1%	9.1%	9.1%
Wexford	4.3%	4.3%	3.7%	6.4%
Wicklow	5.2%	5.3%	5.2%	4.3%



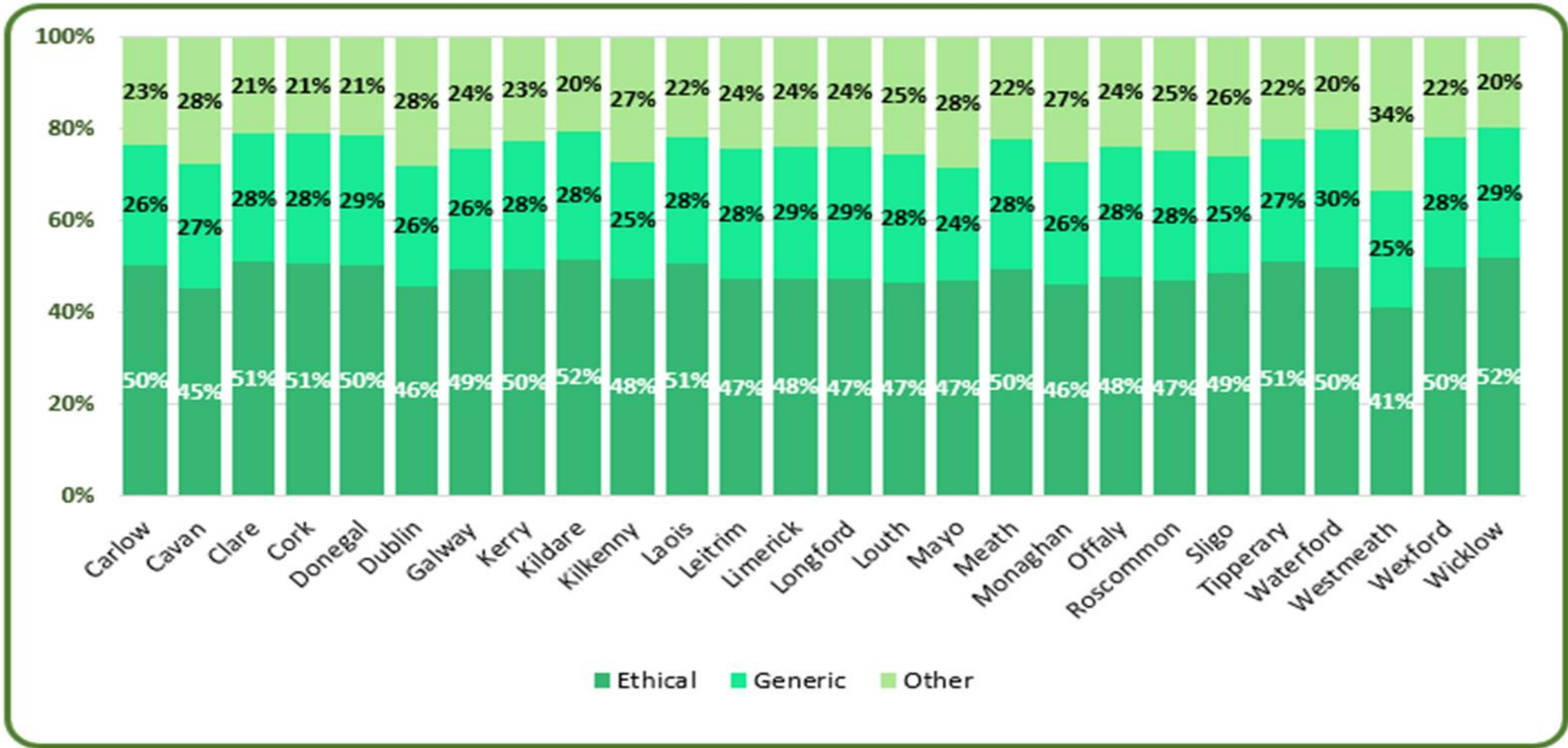
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN January 2021



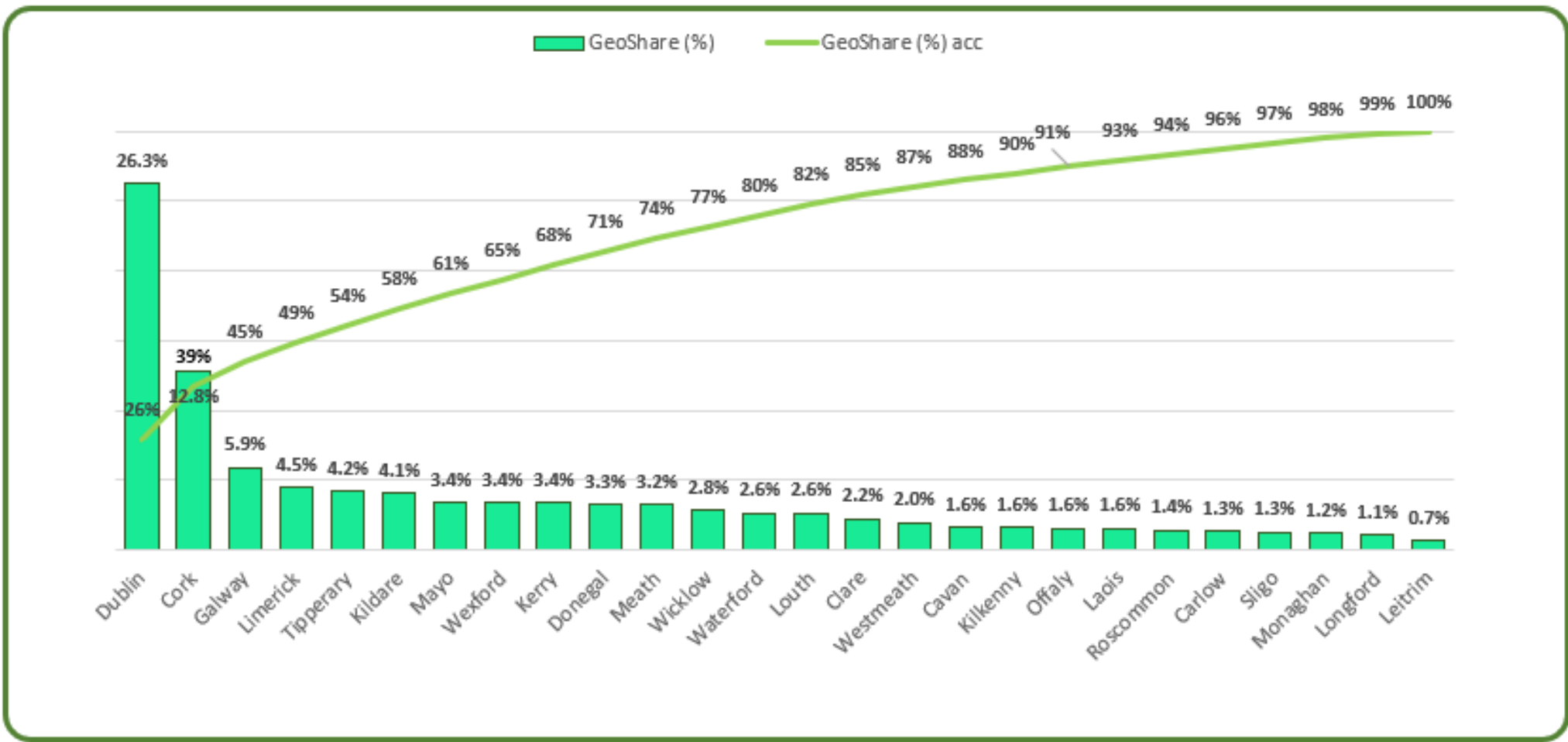
MARKET SEGMENT BY COUNTY ANALYSIS

UNITS DISPENSED IN MAT January 2021



GEOGRAPHICAL SHARE BY COUNTY

January 2021 MAT VALUE



MANUFACTURER ANALYSIS

TOTAL MARKET

Rank	Manufacturer	Values					Units				
		January 2021		MAT January 2021		Last 12 Months	January 2021		MAT January 2021		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	3%		4%			0%		3%		
1	+ Vertex Pharma UK	55%	9%	15%	7%		57%	0%	18%	0%	
2	+ Janssen-Cilag	4%	6%	9%	6%		-4%	1%	-13%	1%	
3	+ Novartis	-2%	6%	2%	6%		-5%	1%	-3%	1%	
4	+ Amgen	32%	4%	37%	4%		9%	0%	18%	0%	
5	+ Teva Pharma Ind	-1%	4%	-1%	4%		0%	9%	0%	9%	
6	+ GlaxoSmithKline IE	-5%	3%	2%	4%		-10%	4%	-5%	4%	
7	+ Abbvie	-35%	3%	-34%	4%		-42%	0%	-35%	0%	
8	+ Pfizer AG	-17%	3%	-18%	4%		-6%	1%	-5%	1%	
9	+ Celgene EU	-1%	3%	8%	3%		3%	0%	6%	0%	
10	+ Viartis	-10%	3%	-8%	3%		-4%	4%	2%	5%	
11	+ MSD	-9%	2%	-14%	2%		-2%	1%	-1%	1%	
12	+ Biogen Idec	39%	3%	95%	2%		39%	0%	99%	0%	
13	+ Bristol-Myers Squibb	17%	2%	20%	2%		15%	1%	21%	0%	
14	+ Novo Nordisk	7%	2%	9%	2%		3%	1%	4%	1%	
15	+ Accord HC	16%	2%	19%	2%		19%	9%	16%	8%	
16	+ AstraZeneca Pharma	22%	2%	16%	2%		4%	1%	6%	1%	
17	+ Roche	5%	2%	8%	2%		-15%	0%	-3%	0%	
18	+ Clonmel HC	2%	2%	3%	2%		3%	8%	3%	8%	
19	+ Boehringer Ingelheim	2%	2%	7%	2%		3%	1%	6%	1%	
20	+ Sanofi	-3%	2%	3%	2%		2%	3%	8%	3%	
21	+ Bayer AG	-19%	2%	-10%	2%		-9%	1%	-7%	1%	
22	+ Astellas	4%	2%	4%	2%		3%	0%	1%	0%	
23	+ Takeda IE	7%	1%	16%	1%		8%	1%	9%	1%	
24	+ Nutricia MD	-2%	1%	5%	1%		8%	9%	14%	9%	
25	+ UCB Pharma IE	8%	1%	8%	1%		2%	0%	4%	0%	

MANUFACTURER ANALYSIS

PHARMACEUTICAL

Rank	Manufacturer	Values						Units					
		January 2021		MAT January 2021		Last 12 Months		January 2021		MAT January 2021		Last 12 Months	
		PYG (%)	MS (%)	PYG (%)	MS (%)			PYG (%)	MS (%)	PYG (%)	MS (%)		
	Total	3%		4%				0%		3%			
1	+ Vertex Pharma UK	55%	9%	15%	7%			57%	0%	18%	0%		
2	+ Janssen-Cilag	4%	6%	9%	6%			-4%	1%	-13%	1%		
3	+ Novartis	-2%	6%	2%	6%			-5%	1%	-3%	1%		
4	+ Amgen	32%	4%	37%	4%			9%	0%	18%	0%		
5	+ Teva Pharma Ind	-1%	4%	-1%	4%			0%	9%	0%	9%		
6	+ GlaxoSmithKline IE	-5%	4%	2%	4%			-10%	4%	-5%	4%		
7	+ Abbvie	-35%	3%	-34%	4%			-42%	0%	-35%	0%		
8	+ Pfizer AG	-17%	3%	-18%	4%			-6%	1%	-5%	1%		
9	+ Celgene EU	-1%	3%	8%	3%			3%	0%	6%	0%		
10	+ Viatris	-10%	3%	-8%	3%			-4%	5%	2%	5%		
11	+ MSD	-9%	2%	-14%	3%			-2%	1%	-1%	1%		
12	+ Biogen Idec	39%	3%	95%	2%			39%	0%	99%	0%		
13	+ Bristol-Myers Squibb	17%	2%	20%	2%			15%	1%	21%	0%		
14	+ Novo Nordisk	7%	2%	9%	2%			3%	1%	4%	1%		
15	+ Accord HC	16%	2%	19%	2%			19%	9%	16%	8%		
16	+ AstraZeneca Pharma	22%	2%	16%	2%			4%	1%	6%	1%		
17	+ Roche	5%	2%	8%	2%			-15%	0%	-3%	0%		
18	+ Clonmel HC	2%	2%	3%	2%			3%	8%	3%	8%		
19	+ Boehringer Ingelheim	2%	2%	7%	2%			3%	1%	6%	1%		
20	+ Sanofi	-3%	2%	3%	2%			2%	3%	8%	3%		
21	+ Bayer AG	-19%	2%	-10%	2%			-9%	1%	-7%	1%		
22	+ Astellas	4%	2%	4%	2%			3%	0%	1%	0%		
23	+ Takeda IE	7%	1%	16%	1%			8%	1%	9%	1%		
24	+ UCB Pharma IE	8%	1%	8%	1%			2%	0%	4%	0%		
25	+ Rowa	-10%	1%	-2%	1%			-9%	4%	0%	5%		

MANUFACTURER ANALYSIS

ETHICAL

Rank	Manufacturer	Values					Units				
		January 2021		MAT January 2021		Last 12 Months	January 2021		MAT January 2021		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	3%		4%			-2%		2%		
1	+ Vertex Pharma UK	55%	10%	15%	7%		57%	0%	18%	0%	
2	+ Janssen-Cilag	4%	7%	9%	7%		-4%	1%	-13%	1%	
3	+ Novartis	-2%	6%	2%	6%		-5%	2%	-3%	2%	
4	+ Amgen	32%	5%	37%	4%		9%	0%	18%	0%	
5	+ GlaxoSmithKline IE	-5%	4%	2%	4%		-10%	6%	-5%	6%	
6	+ Abbvie	-35%	3%	-34%	4%		-42%	0%	-35%	0%	
7	+ Pfizer AG	-16%	4%	-18%	4%		-5%	1%	-5%	1%	
8	+ Celgene EU	-1%	3%	8%	3%		3%	0%	6%	0%	
9	+ Viartis	-13%	3%	-11%	3%		-3%	5%	0%	5%	
10	+ MSD	-9%	3%	-14%	3%		-2%	2%	-1%	2%	
11	+ Biogen Idec	39%	3%	95%	3%		39%	0%	99%	0%	
12	+ Bristol-Myers Squibb	17%	3%	20%	3%		15%	1%	21%	1%	
13	+ Novo Nordisk	7%	2%	9%	2%		3%	1%	4%	1%	
14	+ AstraZeneca Pharma	22%	2%	16%	2%		4%	1%	6%	1%	
15	+ Roche	5%	2%	8%	2%		-15%	0%	-3%	0%	
16	+ Boehringer Ingelheim	2%	2%	7%	2%		3%	1%	6%	1%	
17	+ Sanofi	-3%	2%	3%	2%		2%	5%	8%	4%	
18	+ Bayer AG	-19%	2%	-10%	2%		-9%	2%	-7%	2%	
19	+ Astellas	4%	2%	4%	2%		3%	1%	1%	1%	
20	+ Teva Pharma Ind	-4%	2%	-1%	2%		-11%	3%	1%	3%	
21	+ Takeda IE	7%	1%	16%	2%		8%	1%	9%	1%	
22	+ Nutricia MD	-1%	1%	5%	2%		8%	12%	14%	12%	
23	+ UCB Pharma IE	8%	2%	8%	2%		2%	1%	4%	1%	
24	+ ULM Manuf	18%	2%	22%	1%		3%	2%	14%	2%	
25	+ Merck	-20%	2%	11%	1%		-1%	0%	-12%	0%	

MANUFACTURER ANALYSIS

GENERIC

Rank	Manufacturer	Values						Units					
		January 2021		MAT January 2021		Last 12 Months		January 2021		MAT January 2021		Last 12 Months	
		PYG (%)	MS (%)	PYG (%)	MS (%)			PYG (%)	MS (%)	PYG (%)	MS (%)		
	Total	4%		5%				7%		6%			
1	+ Teva Pharma Ind	2%	25%	0%	25%			4%	26%	0%	26%		
2	+ Accord HC	17%	23%	18%	22%			25%	24%	22%	22%		
3	+ Clonmel HC	21%	12%	11%	12%			25%	13%	13%	12%		
4	+ Rowa	-10%	10%	0%	11%			-8%	11%	2%	12%		
5	+ Krka Pharma	1%	8%	-8%	8%			-2%	7%	-5%	8%		
6	+ Pinewood	-3%	6%	8%	6%			0%	4%	10%	5%		
7	+ Viatris	11%	5%	20%	5%			-6%	4%	7%	4%		
8	+ Bluefish	21%	3%	57%	3%			8%	4%	37%	4%		
9	+ Wockhardt	-13%	2%	22%	2%			-3%	2%	30%	2%		
10	+ Actavis Group	-59%	1%	-56%	1%			-44%	1%	-49%	2%		
11	+ Fannin	-40%	1%	-40%	1%			-39%	1%	-52%	1%		
12	+ Consilient Health	13%	0%	40%	0%			8%	0%	53%	0%		
13	+ Galen	50%	1%	-13%	0%			59%	0%	-9%	0%		
14	+ Tillomed Lab	-2%	0%	1%	0%			-2%	0%	1%	0%		
15	+ Azure Pharmaceuticals	1092%	0%	9706%	0%			3971%	1%	28503%	0%		
16	+ Rosemont Pharma	29%	0%	16%	0%			26%	0%	-18%	0%		
17	+ Phoenix Lab	-11%	0%	7%	0%			-11%	0%	7%	0%		
18	+ Pharmathen	13%	0%	24%	0%			13%	0%	24%	0%		
19	+ Aribamed	3%	0%	29%	0%			3%	0%	42%	0%		
20	+ Orion Corp	11%	0%	14%	0%			5%	0%	10%	0%		
21	+ Bristol Lab	1672%	0%	67761%	0%			1685%	0%	70115%	0%		
22	+ Advanz Pharma IE	33%	0%	12%	0%			55%	0%	13%	0%		
23	+ RPH Pharma	-64%	0%	-53%	0%			-64%	0%	-53%	0%		
24	+ Ranbaxy IE	-49%	0%	-37%	0%			-56%	0%	-42%	0%		
25	+ G.L. Pharma	-18%	0%	1098%	0%			-18%	0%	1098%	0%		

MANUFACTURER ANALYSIS

OTC (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		January 2021		MAT January 2021		Last 12 Months	January 2021		MAT January 2021		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	-4%		4%			-4%		2%		
1	+ Johnson & Johnson	-10%	24%	4%	24%		-8%	10%	4%	10%	
2	+ Takeda IE	8%	20%	8%	19%		9%	19%	9%	19%	
3	+ Reckitt Benckiser IE	1%	10%	7%	10%		-2%	13%	5%	13%	
4	+ Bausch & Lomb	-4%	6%	-5%	6%		-6%	8%	-5%	8%	
5	+ Rowa	88%	8%	80%	6%		95%	11%	87%	8%	
6	+ Clonmel HC	0%	5%	6%	5%		1%	12%	6%	12%	
7	+ Fannin	3%	4%	5%	4%		2%	3%	5%	3%	
8	+ HRA Pharma	-25%	3%	-8%	3%		-25%	1%	-9%	1%	
9	+ Pfizer HC	5%	3%	7%	3%		5%	2%	8%	2%	
10	+ Perrigo Co.	-10%	2%	0%	2%		-6%	1%	-1%	1%	
11	+ Sanofi	-1%	2%	7%	2%		-8%	4%	0%	4%	
12	+ Phoenix Lab	-44%	2%	-27%	2%		-45%	4%	-27%	4%	
13	+ Allergan IE	-2%	2%	-6%	2%		-6%	2%	-4%	2%	
14	+ Pinewood	-49%	1%	-30%	2%		-40%	2%	-27%	2%	
15	+ GlaxoSmithKline IE	-16%	2%	0%	1%		-18%	2%	-2%	2%	
16	+ GlaxoSmithKline HC	-10%	1%	-3%	1%		-16%	1%	-15%	1%	
17	+ Ricesteele Manuf	-5%	1%	-2%	1%		-9%	1%	-6%	1%	
18	+ Mylan	-94%	0%	-42%	1%		-94%	0%	-44%	2%	
19	+ Viartis	-13%	0%	-15%	0%		-17%	0%	-18%	0%	
20	+ RPH Pharma	-14%	0%	1%	0%		-16%	0%	-4%	0%	
21	+ Bayer AG	33%	1%	13%	0%		44%	1%	12%	0%	
22	+ Novartis	-7%	0%	-2%	0%		-7%	1%	-2%	1%	
23	+ Teofarma	18%	0%	-5%	0%		18%	0%	3%	0%	
24	+ PCO Manuf	-68%	0%	-20%	0%		-65%	0%	-20%	0%	
25	+ Teva Pharma Ind	-1%	0%	3%	0%		-6%	0%	9%	0%	

MANUFACTURER ANALYSIS

PATIENT CARE (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values						Units					
		January 2021		MAT January 2021		Last 12 Months		January 2021		MAT January 2021		Last 12 Months	
		PYG (%)	MS (%)	PYG (%)	MS (%)			PYG (%)	MS (%)	PYG (%)	MS (%)		
	Total	1%		6%				-4%		4%			
1	+ Coloplast UK	10%	12%	6%	12%			12%	6%	11%	5%		
2	+ Medtronic Minimed	1%	9%	13%	9%			6%	2%	12%	2%		
3	+ Ascensia Diabetes Care IE	5%	9%	6%	9%			5%	9%	6%	9%		
4	+ Abbott Diabetes Care	-16%	8%	-10%	9%			-9%	6%	-6%	7%		
5	+ LifeScan	11%	7%	10%	7%			11%	8%	10%	7%		
6	+ Roche Diabetes Care	-22%	5%	-7%	7%			-9%	6%	-5%	6%		
7	+ Hollister	2%	6%	6%	6%			3%	2%	6%	2%		
8	+ DexCom	202%	6%	198%	4%			183%	1%	212%	0%		
9	+ B. Braun MD	-8%	4%	6%	4%			-6%	1%	7%	1%		
10	+ Salts HC	-2%	4%	6%	4%			-2%	2%	3%	2%		
11	+ Convatec HC	-10%	3%	5%	3%			-10%	3%	6%	3%		
12	+ Becton Dickinson & Co.	2%	3%	3%	3%			0%	3%	3%	3%		
13	+ Scope Ophthalmics	9%	2%	14%	2%			9%	7%	14%	7%		
14	+ 3M IE	11%	3%	39%	2%			8%	3%	21%	3%		
15	+ Dansac	-9%	2%	-2%	2%			-12%	1%	-4%	1%		
16	+ Novo Nordisk	-2%	2%	-2%	2%			-3%	2%	-3%	2%		
17	+ C.R. Bard	-6%	2%	4%	2%			-9%	3%	7%	4%		
18	+ Eakin	3%	1%	11%	1%			11%	1%	18%	1%		
19	+ Alliance Pharma	7%	1%	2%	1%			4%	1%	3%	1%		
20	+ Lab Thea	13%	1%	22%	1%			13%	2%	23%	2%		
21	+ Medicon IE	-12%	1%	-6%	1%			0%	1%	5%	1%		
22	+ Smith & Nephew	-29%	1%	0%	1%			-16%	2%	0%	3%		
23	+ Clonmel HC	-10%	1%	-9%	1%			-15%	1%	-8%	1%		
24	+ Nutricia MD	-24%	0%	-47%	1%			13%	0%	3%	0%		
25	+ Premier MD	-49%	0%	-35%	1%			-48%	0%	-31%	0%		

MANUFACTURER ANALYSIS

SUPPLEMENTS (DISPENSED THROUGH SCRIPT)

Rank	Manufacturer	Values					Units				
		January 2021		MAT January 2021		Last 12 Months	January 2021		MAT January 2021		Last 12 Months
		PYG (%)	MS (%)	PYG (%)	MS (%)		PYG (%)	MS (%)	PYG (%)	MS (%)	
	Total	-3%		4%			1%		9%		
1	+ Bio-oil research	3%	30%	5%	29%		3%	10%	5%	10%	
2	+ Sona Nut	9%	15%	5%	15%		8%	28%	6%	28%	
3	+ MacuVision EU	-23%	6%	2%	7%		-26%	5%	1%	5%	
4	+ PrecisionBiotics	2%	6%	12%	5%		2%	3%	16%	3%	
5	+ BBI HC	-7%	4%	14%	4%		-7%	5%	0%	5%	
6	+ QM Specials	-11%	3%	-14%	3%		-7%	1%	2%	1%	
7	+ PharmaSource	-54%	2%	-44%	3%		-46%	1%	-31%	1%	
8	+ Pfizer HC	7%	3%	16%	3%		7%	8%	15%	8%	
9	+ Scope Hc	-2%	3%	30%	3%		1%	5%	30%	5%	
10	+ Medisource	9%	1%	-23%	3%		-14%	1%	-36%	1%	
11	+ Kelkin	-26%	3%	45%	3%		-24%	3%	-4%	3%	
12	+ Bausch & Lomb	-28%	2%	5%	2%		-29%	2%	5%	3%	
13	+ Pharma Nord	8%	2%	-3%	2%		22%	2%	-6%	2%	
14	+ Viatris	7%	2%	5%	1%		10%	1%	7%	1%	
15	+ Lamberts HC	-34%	1%	46%	1%		-27%	0%	104%	1%	
16	+ Elements	-28%	1%	-31%	1%		-26%	0%	-31%	0%	
17	+ Natures Aid	81%	2%	28%	1%		84%	3%	21%	2%	
18	+ Rowa	-1%	1%	109%	1%		0%	3%	110%	3%	
19	+ Solvotrin Therapeutics	43%	1%	66%	1%		42%	1%	66%	1%	
20	+ Seven Seas	30%	1%	44%	1%		7%	1%	24%	2%	
21	+ Vitabiotics	11%	1%	-5%	1%		24%	1%	2%	1%	
22	+ Symprove	689%	1%	635%	1%		689%	0%	620%	0%	
23	+ Scope Ophthalmics	18%	1%	15%	1%		17%	1%	24%	1%	
24	+ Sanofi	-7%	1%	44%	1%		-13%	1%	43%	1%	
25	+ Greenlight Supplements	-37%	0%	16%	0%		-37%	0%	16%	0%	



Knowledge for better health

Any questions related to GDPR compliance or data protection please email privacy@hmr.co.com.

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>.