Market Watch Ireland

July 2021

Knowledge for better health

Published on 16th August 2021

We believe in the power of Knowledge.

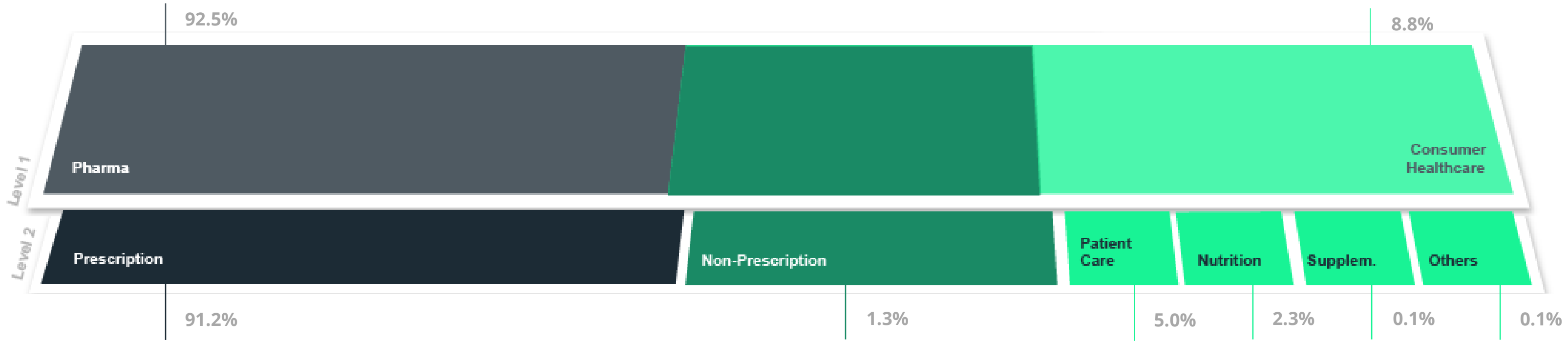
A deep knowledge of the market is the first step to deliver unique market insights. It’s that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyze the market.

Because we believe that the power of knowledge grows when it is shared. And can change lives.

Total Market

Dynamics of the Pharmacy Channel

July 2021
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	July 2021						MAT July 2021					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	208.0 €	100.0%	12.2%	11.3	100.0%	7.3%	2,300.2 €	100.0%	8.1%	126.7	100.0%	5.0%
Pharma Market	192.4 €	92.5%	12.6%	8.9	79.1%	7.7%	2123.8	92.3%	8.4%	100.1	79.0%	3.9%
Consumer Healthcare	18.4 €	8.8%	6.4%	2.8	24.7%	5.5%	207.5	9.0%	4.6%	31.5	24.9%	8.3%
Prescription Medicines	189.7 €	91.2%	12.8%	8.5	75.3%	7.9%	2,092.6 €	91.0%	8.4%	95.2	75.1%	4.0%
Branded	171.7 €	82.5%	12.8%	5.4	47.7%	6.4%	1,893.4 €	82.3%	8.5%	60.5	47.8%	1.5%
Generic	18.0 €	8.6%	12.1%	3.1	27.6%	10.4%	199.2 €	8.7%	8.1%	34.6	27.3%	8.7%
Non Prescription (OTC)	2.7 €	1.3%	4.0%	0.4	3.8%	3.7%	31.2 €	1.4%	4.0%	5.0	3.9%	2.7%
Branded	2.5 €	1.2%	2.2%	0.4	3.4%	1.5%	28.7 €	1.2%	0.8%	4.4	3.5%	-1.8%
Generic	0.2 €	0.1%	29.3%	0.05	0.4%	25.7%	2.5 €	0.1%	65.7%	0.5	0.4%	67.3%
Nutrition	4.8 €	2.3%	5.8%	1.8	15.8%	7.5%	54.3 €	2.4%	8.1%	19.9	15.7%	12.1%
Patient Care	10.4 €	5.0%	7.9%	0.5	4.8%	1.4%	116.0 €	5.0%	3.0%	6.3	4.9%	2.0%
Supplements	0.2 €	0.1%	-3.0%	0.02	0.2%	-2.9%	2.8 €	0.1%	1.4%	0.2	0.2%	5.5%
Others	0.2 €	0.1%	-6.6%	0.01	0.1%	-12.0%	3.3 €	0.1%	14.8%	0.2	0.1%	3.3%

The dispensary retail market in July 2021 increased by +12.2% in value and +7.3% in units, when compared to the same period of the previous year.

The Pharma Market currently represents 92.5% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.2% and 1.3% respectively.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +8.4% in value and +3.9% in units while the Consumer Market shows growth of +4.6% in value and 8.3% in units.

The main driver of the Pharma Market MAT value growth continues to be the Branded POM at +8.5%. Generic POM shows an increase of +8.1% while both OTCs Branded and Generics demonstrate a total increase of +4%.

In units, the POM had a MAT increase of +1.5% for Branded and +8.7% for Generic medicines. OTCs Branded sees a decrease of -1.8% and OTC Generics an increase of +67.3% in units.

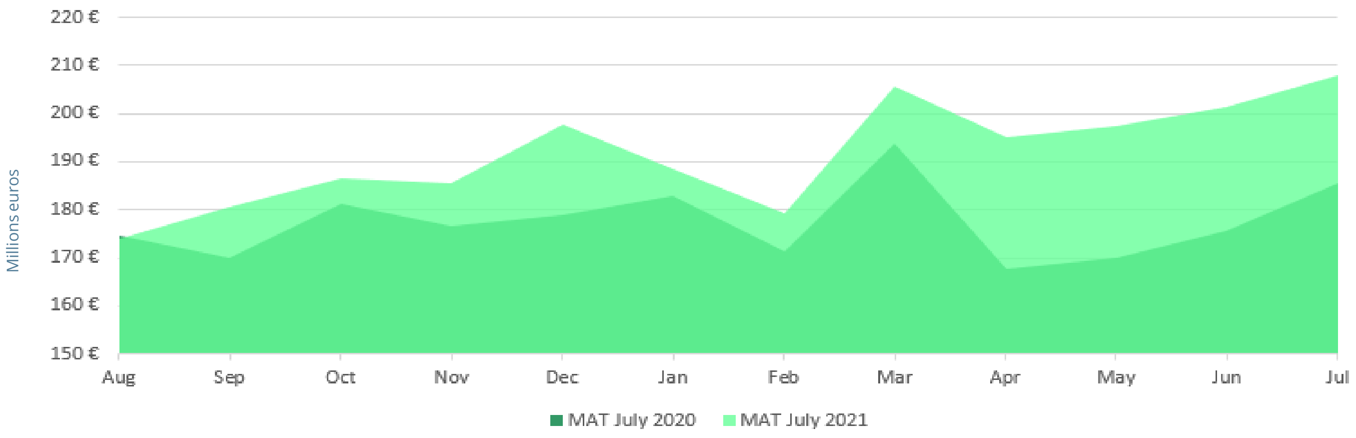
The Consumer Market currently represents 8.8% of the total dispensary market, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 5% and 2.3% respectively.

The growth in the Consumer Market is driven once again by the Nutrition segment with a MAT of +8.1% in value and +12.1% in units.

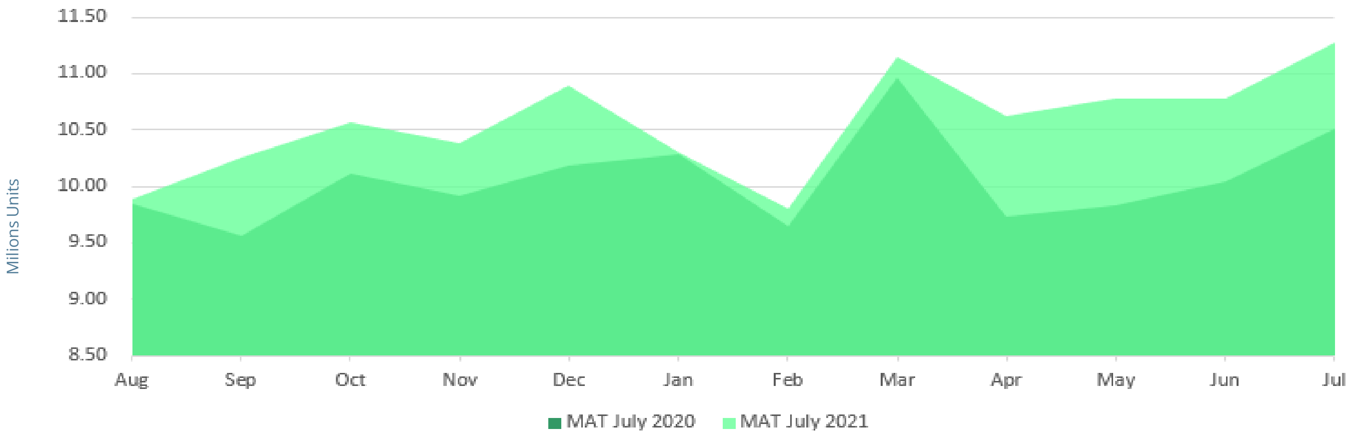
MARKET WATCH IRELAND – July 2021 – PHARMA MARKET

Total Market

Monthly Evolution in Value
July 2020 – July 2021



Monthly Evolution in Units
July 2020 – July 2021



Compared to July 2020, the Total Market continues to demonstrate a more pronounced variation in value than in units (+12.2% and +7.3% respectively).

In July 21, a positive evolution in terms of value and units is observed when compared to the month of June 21 (+3.3% and +4.6% respectively).

Sell Out MAT value and units continues to maintain the trend of exceeding the values registered in 2020, preserving the seasonality trends.

Pharma Market

health market research

Highest Absolute Variations in Value | July 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	7.00	62.18%
2	1	L04B - Anti-TNF products	1.74	10.43%
3	5	L01X - All other antineoplastics	1.51	22.59%
4	6	L04C - Interleukin inhibitors	1.34	22.84%
5	3	L01H - Protein kinase inhibitor antineoplastics	1.18	12.15%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	5.67	108.84%
2	2	Kaftrio	4.99	100.00%
3	5	Amgevita	2.13	93.01%
4	41	Zejula	0.87	-
5	3	Stelara	0.64	16.67%

Highest Absolute Variations in Units | July 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	50.26	9.66%
2	2	C10A - Cholesterol and triglyceride regulating preparations	37.94	6.34%
3	3	A02B - Antiulcerants	34.75	6.26%
4	5	N02B - Non-narcotics and anti-pyretics	30.92	8.51%
5	18	R06A - Systemic antihistamines	21.23	19.62%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	88.72	17.41%
2	76	Astilin	28.35	100.00%
3	15	Atorvastatin Accord	25.56	51.00%
4	2	Ensure	23.57	6.56%
5	16	Paracetamol Accord	23.52	45.62%

Of the Top 5 ATC classes with highest absolute value variation the Cystic Fibrosis R07B class continues to lead manifesting in the highest variation +7 M€ (+62.18%) in relation to the homologous period in 2020. Both Kalydeco® and Kaftrio® also continue to rank in first and second place respectively in the brand rankings, Kalydeco® with +5.67 M€ (+108.84%) and Kaftrio® with +4.99 M€ (+100%).

The Anti-TNF products, L04B class, ranks in second position this month with a positive variation of +1.74 M€ (+10.43%). This market includes the Biosimilar medicine Amgevita® that also continues to rank in the top 5 brands with a growth +2.13 M€ (+93.01%) in relation to the homologous period of 2020.

Also to be noted is the variation observed in the Interleukin inhibitors L04C class, with a positive variation of +1.34 M€ (+22.84%). Within this market, Stelara® continues to rank in the top 5 brands with a growth +0.64 M€ (+16.67%) in relation to July 2020.

The growth observed for Zejula® (+0.87 M€), reflects the effect of it's recent approval of reimbursment under High Tech scheme in March 21.

In terms of highest absolute variations in units, the Anti-depressants and mood stabilisers class N06A continues to lead with an absolute growth of +50.26 Thousand units (9.66%). Within this market, Astilin® is now performing in second place in the Brand ranking, having only been approved for reimbursment in March 21.

Also worth noting is the R06A Class which now has a place in the top ATC ranking with an absolute variation of +21.23 Thousand units (+19.62%), potentially indicating a higher incidence of hayfever in comparison to last year homologous period.

Fortisip® continues to perform steadily as the leading brand in terms of absolute variation in units presenting a strong growth of +88.72 Thousand units (+17.41%) in relation to July 2020. Whithin the same market, Ensure® also ranks in the top Brands with a variation of 23.57 Thousand units (+6.56%).

Pharma Market | High-Tech

health market research

Highest Absolute Variations in Value | July 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	7.00	62.18%
2	1	L04B - Anti-TNF products	1.75	10.49%
3	4	L01X - All other antineoplastics	1.49	22.44%
4	5	L04C - Interleukin inhibitors	1.34	22.84%
5	3	L01H - Protein kinase inhibitor antineoplastics	1.18	12.16%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	5.67	108.84%
2	2	Kaftrio	4.99	100.00%
3	5	Amgevita	2.13	93.01%
4	29	Zejula	0.87	-
5	3	Stelara	0.64	16.67%

Highest Absolute Variations in Units | July 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	3.008	15.65%
2	3	G03G - Gonadotrophins including other ovulation stimulants	2.699	33.35%
3	4	H01C - Hypothalamic hormones	1.555	24.43%
4	7	L04C - Interleukin inhibitors	0.837	28.48%
5	2	L04X - Other immunosuppressants	0.648	3.90%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	3	Amgevita	2.972	93.68%
2	4	Luveris	1.642	100.00%
3	1	Cetrotide	1.451	27.41%
4	16	Hulio	0.962	133.61%
5	7	Gonal-F	0.867	34.25%

As expected, the High-Tech Market maintains it's leadership of the overall Pharma Market in terms of absolute value variation, with the ranking maintaining the same leaders at both ATC Class and Brand level.

The Anti-TNF products L04B class continues to lead with the highest variation in units at +3.008 Thousand units (15.65%). Within this market, the Biosimilars, Amgevita® and Hulio® , continue to also rank in the top 5 brands with a variation of +2.972 Thousand units (93.68%) and +0.962 Thousand units (133.61%) respectively.

The G03G Gonadotrophin class including other ovulation stimulants, now ranks in second place with a growth +2.699 Thousand units (+33.35%) with both Luveris® and Gonal-F® ranking among the top 5 Brands with variations of +1.642 Thousand units (100%) and +0.867 Thousand units (34.25%) respectively.

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | July 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	17	T03A - Diagnostic equipment and accessories	0.75	70.89%
2	2	B01F - Direct factor Xa inhibitors	0.63	10.66%
3	9	A10S - GLP-1 agonist antidiabetics	0.48	22.39%
4	61	J07E - Viral vaccines	0.41	1246.28%
5	19	A10P - SGLT2 inhibitor antidiabetics	0.40	28.87%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Eliquis	0.59	17.82%
2	10	Dexcom	0.54	100.00%
3	4	Ozempic	0.51	51.72%
4	50	Covid-19 Vaccine Janssen	0.40	-
5	54	Duodopa	0.37	31662.15%

Highest Absolute Variations in Units | July 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	50.26	9.66%
2	2	C10A - Cholesterol and triglyceride regulating preparations	37.86	6.33%
3	3	A02B - Antiulcerants	34.75	6.26%
4	5	N02B - Non-narcotics and anti-pyretics	30.92	8.51%
5	18	R06A - Systemic antihistamines	21.23	19.62%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	88.72	17.41%
2	76	Astilin	28.35	100.00%
3	15	Atorvastatin Accord	25.56	51.00%
4	2	Ensure	23.57	6.56%
5	16	Paracetamol Accord	23.52	45.62%

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme, the Diagnostic equipment and accessories T03A class leads the top 5 ATC Classes with the highest absolute variation in value +0.75 M€ (+70.89%). Dexcom® sensors appear to be behind the observed growth in this market, performing in the Top 5 Brands with a variation of +0.54 M€ (100%).

Continuing with highest absolute variations in value, the Direct factor Xa inhbitors ranks the B01F Class, in second place with a growth of +0.63 M€ (+10.66%). This class includes Eliquis® that presented a growth of +0.59 M€ (17.82%) in comparison to last year's homologous period. To note - since the 1st November 2020, there is no longer the requirement to submit an online reimbursement application for any of the direct acting oral anticoagulants.

Within the antidiabetic classes, the Class A10S GLP-1 agonists presents a variation of +0.48 M€ (22.39%) with Ozempic® manifesting a growth of +0.51 M€ (51.72%). Also worth noticing is the variation observed in the A10P SGLT2 inhibitors class of +0.4 M€ (28.87%) that could potentially be related to the recent approvals for extension of therapeutic indications (such as Heart Failure and Chronic kidney disease).

The Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, leads the overall Pharma market in terms of absolute unit variation, with the rankings maintaining the same leaders at both ATC Classes and Brand level.

Pharma Market | Generic

health market research

Highest Absolute Variations in Value | July 2021

INN's

rank var abs	rank value		INN	Var. Abs. M€	Var.
1	49	+	Posaconazole	0.10	2311.31%
2	1	+	Atorvastatin	0.10	7.86%
3	2	+	Rosuvastatin	0.09	9.01%
4	17	+	Omeprazole	0.08	36.84%
5	9	+	Sertraline	0.07	23.38%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.11	55.79%
2	6	Escitalopram Teva	0.10	100.00%
3	2	Rosuvastatin Teva Pharma	0.09	20.23%
4	19	Lactulose Fresenius	0.08	85.06%
5	7	Omeprazole Teva	0.08	49.30%

Highest Absolute Variations in Units | July 2021

INN's

rank var abs	rank valor		ATC3	Var. Abs. Th Units	Var.
1	11	+	Paracetamol	25.32	47.85%
2	1	+	Atorvastatin	23.01	7.59%
3	12	+	Omeprazole	20.23	34.92%
4	9	+	Sertraline	18.68	23.87%
5	3	+	Rosuvastatin	14.41	8.55%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	4	Atorvastatin Accord	25.56	51.00%
2	5	Paracetamol Accord	23.60	100.00%
3	8	Escitalopram Teva	23.45	54.76%
4	7	Omeprazole Teva	22.53	49.29%
5	18	Lactulose Fresenius	18.94	85.06%

Within The Generic Market the top 5 INNs with highest absolute variation in value are Posaconazole and Atorvastatin that present a growth of +0.10 M€, in comparison to last year's homologous period. It is also noteworthy that in January 2020 the first Posaconazole generic was approved for reimbursment under the High Tech Scheme.

In relative terms Atorvastatin, Rosuvastatin, Omeprazole and Sertraline present marked positive variations, both in value and units.

Atorvastatin Accord takes the lead in Brand ranking presenting the highest variations both in value +0.11 M€ (55.79%) and in units +25.56 Thousand Units (51%).

In terms of greatest absolute variation in units, the INN Paracetamol leads with a variation of +25.32 Thousand units (47.85%). Paracetamol Accord is in the main responsible for this variation performing in second place in the top 5 Brand ranking with a variation of +23.6 Thousand units (100%) in relation to July 2020.

Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | July 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	+ Vertex Pharma UK	7.00	62.18%
2	5	+ Amgen	2.07	27.19%
3	2	+ Janssen-Cilag	1.44	12.92%
4	3	+ Novartis	1.05	9.57%
5	6	+ GlaxoSmithKline IE	0.87	12.59%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	+ Novo Nordisk	0.66	16.50%
2	7	+ Bristol-Myers Squibb	0.56	17.37%
3	34	+ DexCom	0.54	141.14%
4	17	+ Krka Pharma	0.43	24.23%
5	6	+ Clonmel HC	0.42	11.89%

Highest Absolute Variations in Value | July 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	+ Vertex Pharma UK	7.00	62.18%
2	4	+ Amgen	1.95	34.27%
3	2	+ Janssen-Cilag	1.34	13.53%
4	3	+ Novartis	0.95	11.10%
5	19	+ GlaxoSmithKline IE	0.79	307.24%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	2	+ Accord HC	0.52	13.79%
2	3	+ Clonmel HC	0.41	21.15%
3	1	+ Teva Pharma Ind	0.34	8.30%
4	5	+ Krka Pharma	0.31	23.71%
5	6	+ Pinewood	0.20	15.45%

In both total Pharma Market and High Tech Market, Vertex ranks first in value, consolidating its position with a growth of 7 M€ (62.18%). Amgen is also experiencing a significant value growth of +2.07 M€ (27.19%) in the total Pharma Market and +1.95 M€ (34.27%) in the High Tech Market.

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the scenario changes and Novo Nordisk leads with the highest absolute variation in value at +0.66 M€ (16.50%) in relation to the homologous period of 2020. Also noteworthy is the Dexcom ranking in third place with a variation of +0.54 M€ (141.14%) which is aligned to the growth previously observed for Dexcom brand®.

Among the Generic Market the top five companies with highest absolute variations in value include Accord, Clonmel, Teva, Krka and Pinewood.

MARKET WATCH IRELAND – July 2021 – PHARMA MARKET

Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | July 2021

Pharma Market

rank var abs	rank valor		Company	Var. Abs. Th Units	Var.
1	4	+	Clonmel HC	114.29	14.04%
2	2	+	Nutricia MD	97.89	10.80%
3	3	+	Accord HC	79.98	9.01%
4	1	+	Teva Pharma Ind	75.16	7.97%
5	11	+	Krka Pharma	58.30	18.41%

Pharma Market | Excluding High Tech

rank var abs	rank valor		Company	Var. Abs. Th Units	Var.
1	4	+	Clonmel HC	114.22	14.04%
2	2	+	Nutricia MD	97.89	10.80%
3	3	+	Accord HC	79.14	8.94%
4	1	+	Teva Pharma Ind	75.28	8.00%
5	11	+	Krka Pharma	58.31	18.41%

Highest Absolute Variations in Units | July 2021

Pharma Market | High Tech

rank var abs	rank value		Company	Var. Abs. Th Units	Var.
1	1	+	Merck	4.005	30.97%
2	2	+	Amgen	2.623	20.76%
3	12	+	Viatris	1.064	81.53%
4	6	+	Biogen Idec	0.988	17.73%
5	5	+	Novartis	0.850	11.87%

Pharma Market | Generic

rank var abs	rank valor		Company	Var. Abs. Th Units	Var.
1	2	+	Accord HC	97.08	14.54%
2	3	+	Clonmel HC	81.25	23.04%
3	1	+	Teva Pharma Ind	61.93	8.46%
4	5	+	Krka Pharma	38.41	17.04%
5	6	+	Pinewood	20.98	10.75%

In the total Pharma Market, Clonmel ranks first with the highest variation in units, performing with a growth of +114.29 Thousand units (14.04%). Nutricia is also performing with a significant growth in relation to the homologous period of 2020 achieving +97.89 Thousand units (10.80%) with Fortisip® steadly performing as leading brand in terms of absolute variation in units in the total Pharma Market.

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the scenario remains unchanged.

On the other hand, a different picture is captured for the High Tech Market, with Merck leading this market with an absolute variation of +4.005 Thousand units (30.97%).

In the Generic Market the top five companies with highest absolute variations in units include the same players and ranking order as the variations in value: Accord, Clonmel, Teva, Krka and Pinewood.

HMR

Glossary

Scope
Analysis of pharmaceutical market main trends and dynamics

Frequency
Monthly

Periods
MAT - Moving Annual Total (last 12 months)
YTD - Year To Date (from January to current month)

Variables
Units – Number of packs dispensed
Values - Trade value of packs dispensed, in euros
Sell-Out - Represents the products dispensed by pharmacies to patients

Analysed market
Irish community pharmacies dispensary data

Pharmacy panel
Full market information based on a panel of 1,378 Pharmacies, representing a numeric coverage of 73%

Segments

- **Pharma Market** – Includes all medicines dispensed in community pharmacies from the dispensary. Comprises of licensed and exempt medicinal products (ULM/EMP).
    - **Prescription Market** – All prescription only medicines (POM).
        - Prescription branded medicines – Non-generic POM.
        - Prescription generic medicines – Generic POM.
    - **Non-Prescription Market (OTC)** – All non prescription medicines.
        - Non-Prescription branded OTC – Non-generic OTCs.
        - Non-Prescription generic OTC – Generic OTCs.
- **Consumer Healthcare** – Includes products dispensed in community pharmacies from the dispensary, such as health products reimbursed by the national health system or non-prescription medicines (OTC).
    - **Patient Care** – Products intended for the care of patients. Comprises of mainly medical devices present in markets as diabetes, continence or ostomy.
    - **Nutrition** – Nutritional products. Comprises of mainly food for special medical purposes and special diets.
    - **Supplements** – Food supplements intended to complement normal diets.
    - **Other Consumer Healthcare** – All other health products dispensed with low market expression (e.g. dermocosmetics, raw materials, veterinary).

HMR health market research

Knowledge for better health