Market Watch Ireland

August 2021

Knowledge for better health

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.

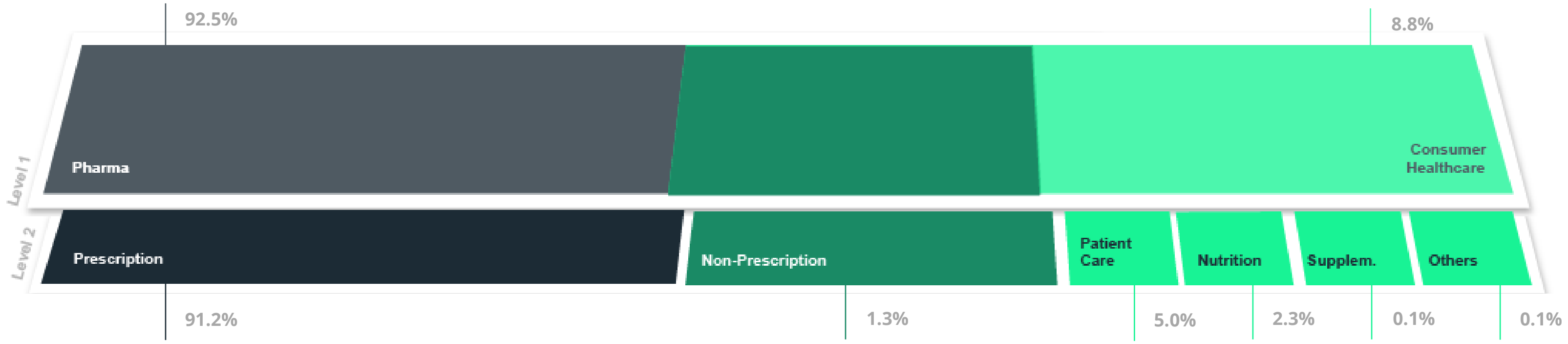
MARKET WATCH IRELAND – August 2021 – PHARMA MARKET

Total Market

Dynamics of the Pharmacy Channel

August 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 August 2021 increased by +14.4% in value and +7.7% 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. Values that are aligned with July's growth.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +9.7% in value and +4.8% in units while the Consumer Market is growing +4.9% in value and +7.9% in units.

Branded POM consolidates it's position as the main driver for the Pharma Market with MAT value growth at +9.8%. Generic POM sees an increase of +9.2% while both OTCs Branded and Generics demonstrate a total increase of +4.2%.

In units, POM sees a MAT increase of +2.4% for Branded and +9.5% for Generic medicines. OTCs Branded sees a decrease of -1.2% and OTC Generics an increase of +60.9% in units.

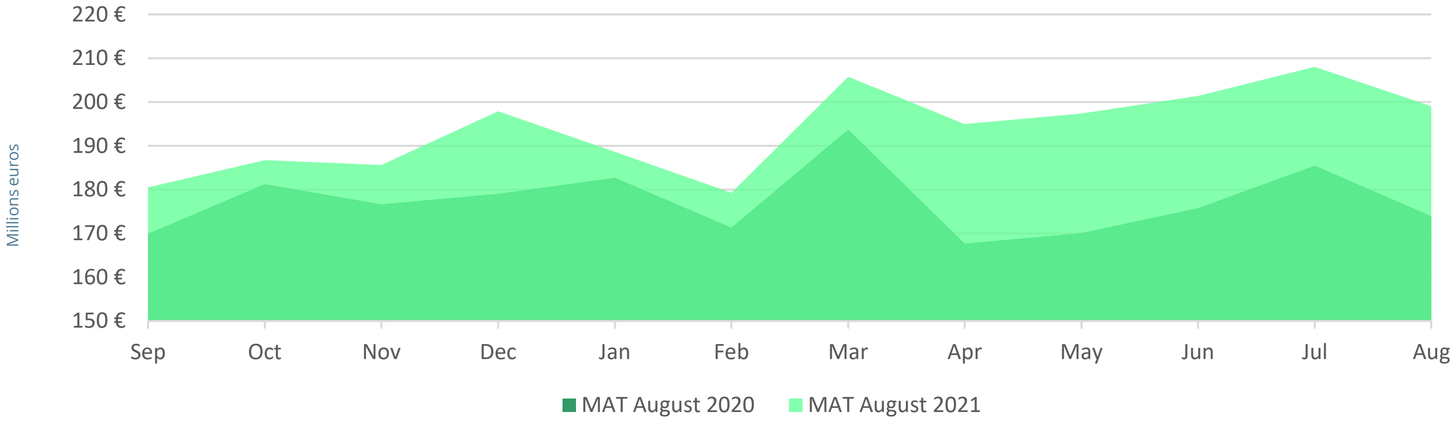
The Consumer Market currently represents 8.8% of the total dispensary market, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 5% and 2.3% respectively.

The growth in the Consumer Market continues to be driven by the Nutrition segment with a MAT growth of +7.9% in value and +11.4% in units.

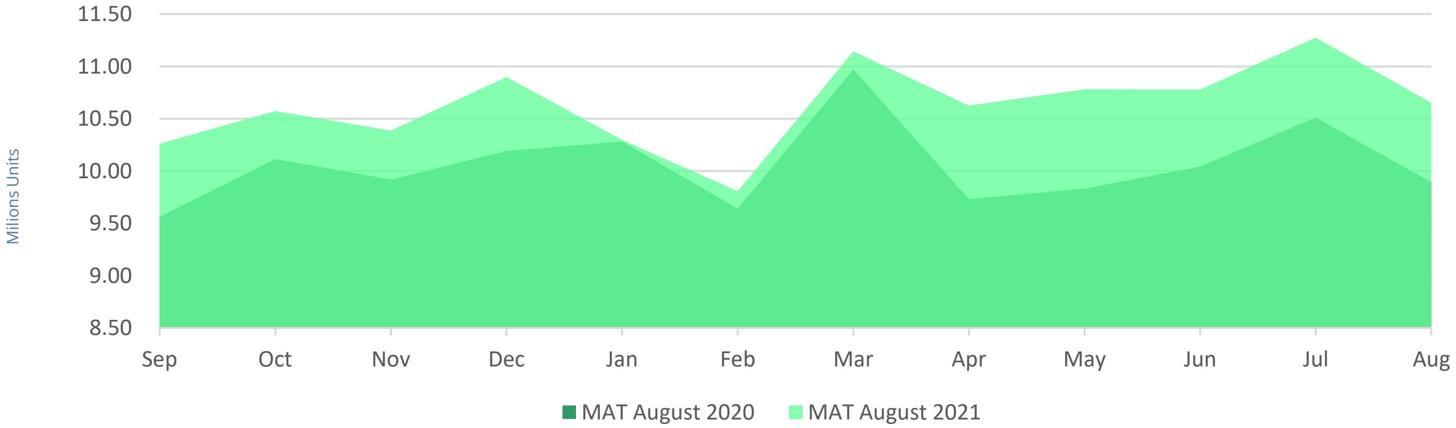
Published on 26th September 2021

Total Market

Monthly Evolution in Value
August 2020 – August 2021



Monthly Evolution in Units
August 2020 – August 2021



Compared to August 2020, the Total Market continues to register a more pronounced variation in value than in units (+14.4% and +7.7% respectively).

In August 2021, a decline in terms of value and units sold is observed when compared to the month of July 21 (-4.3% and -5.5% respectively).

Despite the decline in relation to July 2021, the Sell Out MAT in value and units continues to substantially exceed the recorded values in the homologous period of 2020 and demonstrates the perseverance of similar seasonality trends.

Published on 26th September 2021

Pharma Market

Highest Absolute Variations in Value | August 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	7.5	72.3%
2	5	L04C - Interleukin inhibitors	2.3	43.2%
3	2	L04B - Anti-TNF products	2.1	13.6%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.9	21.8%
5	6	L01X - All other antineoplastics	1.1	17.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	5.6	120.3%
2	2	Kaftrio	5.0	100.0%
3	4	Amgevita	2.1	95.1%
4	3	Stelara	1.6	47.2%
5	5	Revlimid	0.7	20.2%

Highest Absolute Variations in Units | August 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	53.9	11.0%
2	2	C10A - Cholesterol and triglyceride regulating preparations	42.5	7.6%
3	3	A02B - Antiulcerants	41.4	8.0%
4	5	N02B - Non-narcotics and anti-pyretics	34.8	10.3%
5	14	N05B - Hypnotics/sedatives	23.2	16.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	62.1	12.5%
2	70	Astilin	28.8	100.0%
3	2	Ensure	28.1	8.3%
4	16	Atorvastatin Accord	25.0	52.7%
5	15	Paracetamol Accord	24.6	51.1%

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Of the Top 5 ATC classes with highest absolute variations in value the Cystic Fibrosis R07B class continues to maintain leadership demonstrating the highest variation at +7.49 M€ (+72.34%) in relation to the homologous period of 2020. Both Kalydeco® and Kaftrio® also continue to rank in first and second place respectively in brand rankings, Kalydeco® with +5.60 M€ (+120.28%) and Kaftrio® with +5.02 M€ (+100%).

The Interleukin inhibitors L04C class now ranks in second place with a positive variation of +2.29 M€ (+43.15%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +1.55 M€ (+47.20%) in relation to the homologous period of 2020.

This month the Anti-TNF products L04B class ranks in third position with a positive variation of +2.13 M€ (+13.61%), with the Biosimilar medicine Amgevita® ranking in the top 5 brands with a growth of +2.14 M€ (+95.09%).

Worth highlighting is the antineoplastic drug Revlimid® that now ranks in the top 5 brands with a growth of +0.71 M€ (20.16%) in relation to August 2020.

In terms of highest absolute variations in units, the ranking maintains the same leader as the previous month, with Anti-depressants and mood stabilisers class N06A leading with an absolute growth of +53.89 Thousand units (11%).

The Class N05B Hypnotics/Sedatives now holds a position in the top ATC ranking with an absolute variation of +23.24 Thousand units (+16.04%).

The Top 5 brands with Highest Absolute Variation in units maintain the same players as observed in July 2021.

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Pharma Market | High-Tech

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Highest Absolute Variations in Value | August 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	7.5	72.3%
2	5	L04C - Interleukin inhibitors	2.3	43.2%
3	2	L04B - Anti-TNF products	2.1	13.6%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.9	21.8%
5	6	L01X - All other antineoplastics	1.1	17.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	5.6	120.3%
2	2	Kaftrio	5.0	100.0%
3	4	Amgevita	2.1	95.1%
4	3	Stelara	1.6	47.2%
5	5	Revlimid	0.7	20.2%

Highest Absolute Variations in Units | August 2021

ATC3

rank var abs	rank valu e	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	3.4	19.0%
2	3	G03G - Gonadotrophins including other ovulation stimulants	1.5	17.5%
3	7	L04C - Interleukin inhibitors	1.1	41.2%
4	2	L04X - Other immunosuppressants	1.0	6.5%
5	4	H01C - Hypothalamic hormones	0.7	11.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Amgevita	3.0	95.8%
2	16	Hulio	0.9	100.0%
3	4	Luveris	0.8	19.3%
4	7	Benepali	0.7	29.5%
5	3	Cetrotide	0.6	10.9%

The High-Tech Market leads the overall Pharma Market in terms of absolute value variation, with the same leaders maintaining their ranking at both ATC Classes and Brand level.

In terms of Highest Absolute Unit Variation the market maintains the same ranking for ATC Classes as demonstrated in July 2021.

The Anti-TNF products L04B class continues to lead with the highest variation in units with +3.441 Thousand units (18.99%). Within this market, the Biosimilars Amgevita®, Hulio® and Benepali® also rank in the top 5 brands with a variation of +2.984 Thousand units (95.76%), +0.929 Thousand units (100%) and +0.782 Thousand units (19.28%) respectively. The continued growth observed in these products reinforces the impact of the MMP recommendations on best-value biological medicines.

The G03G0 class, Gonadotrophins, including other ovulation stimulants, continues to rank in second place in the highest unit variation, with a growth of +1.527 Thousand units (+17.51%). Within this market, Luveris® ranks, once again, amongst the top 5 Brands with a variation of +0.782 Thousand units (19.28%).

The L04C Class, Interleukin inhibitors, changes its position and now ranks in third place with a variation of +1.129 Thousand units (41.21%) in relation to the homologous period of 2020.

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | August 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	16	T03A - Diagnostic equipment and accessories	0.7	66.7%
2	2	B01F - Direct factor Xa inhibitors	0.6	11.4%
3	9	A10S - GLP-1 agonist antidiabetics	0.5	27.1%
4	18	A10P - SGLT2 inhibitor antidiabetics	0.4	33.2%
5	7	N06A - Anti-depressants and mood stabilisers	0.3	9.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Eliquis	0.56	17.6%
2	4	Ozempic	0.54	100.0%
3	10	Dexcom	0.50	122.2%
4	3	Prolia	0.26	15.6%
5	8	Medtronic	0.22	27.1%

Highest Absolute Variations in Units | August 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	53.9	11.0%
2	2	C10A - Cholesterol and triglyceride regulating preparations	42.5	7.5%
3	3	A02B - Antiulcerants	41.4	8.0%
4	5	N02B - Non-narcotics and anti-pyretics	34.8	10.3%
5	14	N05B - Hypnotics/sedatives	23.2	16.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	62.1	12.5%
2	70	Astilin	28.8	100.0%
3	2	Ensure	28.1	8.3%
4	16	Atorvastatin Accord	25.0	52.7%
5	15	Paracetamol Accord	24.6	51.1%

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, the Diagnostic equipment and accessories T03A class continues to lead the top 5 ATC Classes with the highest absolute variation in value of +0.71 M€ (+66.74%). Within this market, Dexcom® and Medtronic® rank in the Top 5 Brands with a variation of +0.50 M€ (122.19%) and +0.22 M€ (27.12%) respectively.

The Direct factor Xa inhibitors B01F Class holds second place with a growth of +0.64 M€ (+11.40%). Within this class, Eliquis® is performing with a growth of +0.56 M€ (17.60%) in comparison to last year's homologous period.

The antidiabetic classes, A10S and A10P, continue to maintain their position in the value rankings. The Class A10S GLP-1 agonists now presents a variation of +0.55 M€ (27.11%) with Ozempic® observing a growth of +0.54 M€ (100%) in relation to August 2020. The A10P SGLT2 inhibitors class now ranks in fourth place with an increase of +0.43 M€ (33.20%), continuing to benefit from the positive impact of the recent approvals for extension of therapeutic indications of products within this class (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.

The Top 5 brands with Highest Absolute Variation in units maintain the same players as observed in July 2021.

Pharma Market | Generic

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Highest Absolute Variations in Value | August 2021

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	36	Posaconazole	0.12	992.8%
2	2	Rosuvastatin	0.11	11.1%
3	1	Atorvastatin	0.10	8.6%
4	9	Sertraline	0.08	27.4%
5	17	Omeprazole	0.08	39.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.11	57.6%
2	1	Rosuvastatin Teva Pharma	0.10	100.0%
3	6	Escitalopram Teva	0.10	56.8%
4	7	Omeprazole Teva	0.08	51.6%
5	13	Venlafex	0.07	59.2%

Highest Absolute Variations in Units | August 2021

INN's

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	11	Paracetamol	26.2	52.9%
2	1	Atorvastatin	23.9	8.3%
3	9	Sertraline	20.7	28.8%
4	12	Omeprazole	20.2	37.3%
5	3	Rosuvastatin	16.9	10.7%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	5	Atorvastatin Accord	25.0	52.7%
2	4	Paracetamol Accord	24.6	100.0%
3	8	Escitalopram Teva	23.3	58.2%
4	7	Omeprazole Teva	22.1	51.6%
5	2	Rosuvastatin Teva Pharma	16.3	22.7%

Within the top 5 INNs with highest absolute variation in value are Posaconazole and Rosuvastatin with a growth of +0.12 M€ and +0.11 M€ respectively, in comparison to last year's homologous period. It is also noteworthy that in January 2020 the first Posaconazole generic was approved for reimbursement under the High Tech Scheme.

In relative terms, Atorvastatin, Rosuvastatin, Omeprazole and Sertraline continue to perform with marked positive variations both in value and units.

Atorvastatin Accord once again leads the Brand ranking recording the highest variations both in value of +0.11 M€ (57.63%) and in units of +24.95 Thousand Units (52.74%).

In terms of highest absolute variation in units, the INN ranking performs with the same players and similar variations to those of July 2021. In Brand ranking, the first four places are maintained by the same players as the previous month with Rosuvastatin Teva Pharma now holding fifth place with a variation +16.29 Thousand Units (22.68%) in comparison to last year's homologous period.

Top 5 Companies | By Sell-Out Value

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Highest Absolute Variations in Value | August 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex Pharma UK	7.49	72.3%
2	2	Janssen-Cilag	2.54	25.0%
3	5	Amgen	2.29	32.6%
4	3	Novartis	1.56	15.1%
5	15	AstraZeneca Pharma	1.08	32.7%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	Novo Nordisk	0.71	18.8%
2	7	Bristol-Myers Squibb	0.55	17.7%
3	33	DexCom	0.50	122.2%
4	17	Krka Pharma	0.49	30.1%
5	6	Clonmel HC	0.36	10.5%

Highest Absolute Variations in Value | August 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex Pharma UK	7.49	72.3%
2	2	Janssen-Cilag	2.46	27.4%
3	4	Amgen	2.02	37.9%
4	3	Novartis	1.45	17.8%
5	13	AstraZeneca Pharma	0.87	99.3%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	2	Accord HC	0.45	12.4%
2	1	Teva Pharma Ind	0.39	10.1%
3	5	Krka Pharma	0.38	32.4%
4	3	Clonmel HC	0.35	18.1%
5	6	Pinewood	0.17	13.8%

In both total Pharma Market and High Tech Market, Vertex continues to rank first in value, consolidating it's position with a growth of +7.49 M€ (72.34%).

Jassen-Cilag changes position with Amgen and now ranks second in both the total Pharma and the High Tech Markets with an observed growth of +2.54 M€ (25.01%) and +2.46 M€ (27.42%) respectively.

Now in third place, Amgen continues to experience a significant value growth of +2.29 M€ (32.61%) in the total Pharma Market and of +2.02M€ (37.94%) in the High Tech Market.

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the situation remains similar to the one observed in July 2021 with Novo Nordisk leading with the highest absolute variation in value at +0.71 M€ (18.78%) in relation to the homologous period of 2020.

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

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Top 5 Companies |By Sell-Out Units

Highest Absolute Variations in Units | August 2021

Pharma Market

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	4	Clonmel HC	95.9	12.1%
2	3	Accord HC	85.6	10.4%
3	1	Teva Pharma Ind	77.5	8.7%
4	11	Krka Pharma	70.2	24.4%
5	2	Nutricia MD	67.8	7.8%

Pharma Market | Excluding High Tech

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	4	Clonmel HC	95.8	12.1%
2	3	Accord HC	84.9	10.3%
3	1	Teva Pharma Ind	77.3	8.7%
4	11	Krka Pharma	70.2	24.4%
5	2	Nutricia MD	67.8	7.8%

Highest Absolute Variations in Units | August 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Amgen	3.02	25.7%
2	1	Merck	2.04	15.0%
3	9	Janssen-Cilag	1.16	44.9%
4	4	Novartis	1.11	16.4%
5	12	Viatris	0.99	74.2%

Pharma Market | Generic

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Accord HC	86.6	13.7%
2	3	Clonmel HC	70.6	20.3%
3	1	Teva Pharma Ind	64.8	9.4%
4	5	Krka Pharma	53.3	26.7%
5	4	Rowa	24.8	8.1%

In the total Pharma Market, Clonmel continues to steadily rank in first position with the highest variation in units, performing with a growth of +95.93 Thousand units (12.10%). Accord is now performing in second place with a significant growth in relation to the homologous period of 2020 achieving +85.63 Thousand units (10.36%).

In terms of unit variation for the Pharma Market excluding the medicines reimbursed under the High Tech Scheme arrangements, the situation remains unchanged.

On the other hand, a different picture is captured for the High Tech Market, with Amgen now leading this market with an absolute variation of +3.020 Thousand units (25.66%) followed by Merck with an absolute variation of +2.044 Thousand units (15.00%). Also worth noting is that Jassen-Cilag now holds a position in the High Tech Market ranking, demonstrating a growth of +1.164 Thousand units (44.95%).

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

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).

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Knowledge for better health