health market research

Market Watch Ireland

September 2021

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Country Manager

Knowledge for better health

We believe in the power of Knowledge.

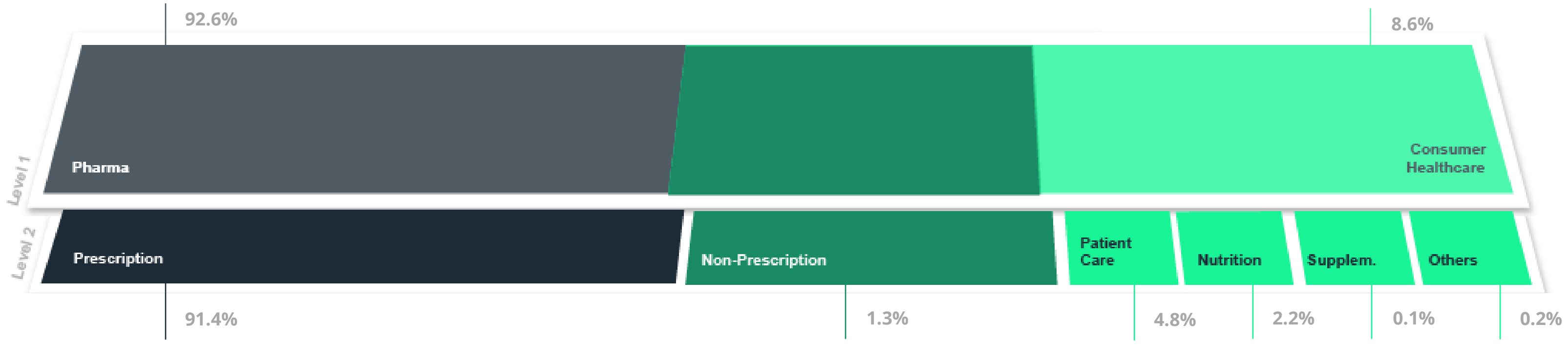
A deep knowledge of the market is the first step to deliver unique market insights. It’s that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyse the market.

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

Total Market

Dynamics of the Pharmacy Channel

September 2021
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	September 2021						MAT September 2021					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	207.0 €	100.0%	14.7%	11.0	100.0%	7.4%	2,351.4 €	100.0%	10.0%	128.2	100.0%	5.6%
Pharma Market	191.8 €	92.6%	15.4%	8.7	79.3%	7.6%	2173.2	92.4%	10.4%	101.4	79.1%	5.0%
Consumer Healthcare	17.9 €	8.6%	6.2%	2.7	24.5%	5.8%	209.7	8.9%	4.8%	31.8	24.8%	7.3%
Prescription Medicines	189.2 €	91.4%	15.6%	8.3	75.5%	7.9%	2,141.7 €	91.1%	10.5%	96.4	75.2%	5.1%
Branded	171.6 €	82.9%	16.0%	5.3	47.9%	6.5%	1,938.8 €	82.5%	10.6%	61.2	47.7%	2.7%
Generic	17.6 €	8.5%	11.3%	3.0	27.6%	10.3%	202.9 €	8.6%	9.5%	35.2	27.5%	9.6%
Non Prescription (OTC)	2.6 €	1.3%	4.4%	0.4	3.8%	2.6%	31.4 €	1.3%	4.1%	5.0	3.9%	2.8%
Branded	2.4 €	1.2%	3.7%	0.4	3.4%	1.9%	28.9 €	1.2%	1.3%	4.4	3.5%	-1.1%
Generic	0.2 €	0.1%	13.2%	0.04	0.4%	8.8%	2.5 €	0.1%	53.6%	0.5	0.4%	53.7%
Nutrition	4.6 €	2.2%	6.6%	1.7	15.6%	7.9%	54.9 €	2.3%	7.3%	20.2	15.7%	10.4%
Patient Care	10.0 €	4.8%	6.6%	0.5	4.8%	2.4%	117.3 €	5.0%	3.9%	6.3	4.9%	1.8%
Supplements	0.2 €	0.1%	5.6%	0.02	0.2%	0.8%	2.8 €	0.1%	1.2%	0.2	0.2%	3.7%
Others	0.4 €	0.2%	3.4%	0.02	0.1%	-2.7%	3.3 €	0.1%	2.6%	0.2	0.1%	-1.0%

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The dispensary retail market in September 2021 increased by +14.7% in value and +7.4% in units, when compared to the same period of the previous year.

The Pharma Market currently represents 92.6% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.4% and 1.3% respectively.

The moving annual total (MAT) analysis shows the Pharma Market growing at +10.4% in value and +5.0% in units and the Consumer Market growing at +4.8% in value and +7.3% in units.

The main driver of the Pharma Market MAT value growth continues to be the Branded POM at +10.6%. Generic POM sees an increase of +9.5% while both OTCs Branded and Generics show a total increase of +4.1%.

In units, POM sees a MAT increase of +2.7% for Branded and +9.6% for Generic medicines. OTCs Branded sees a decrease of -1.1% and OTC Generics an increase of +53.79% in units.

The Consumer Market currently represents 8.6% of the total dispensary market, with Non-prescription medicines contributing 1.3% with Patient care and Nutrition segments 4.8% and 2.2% respectively.

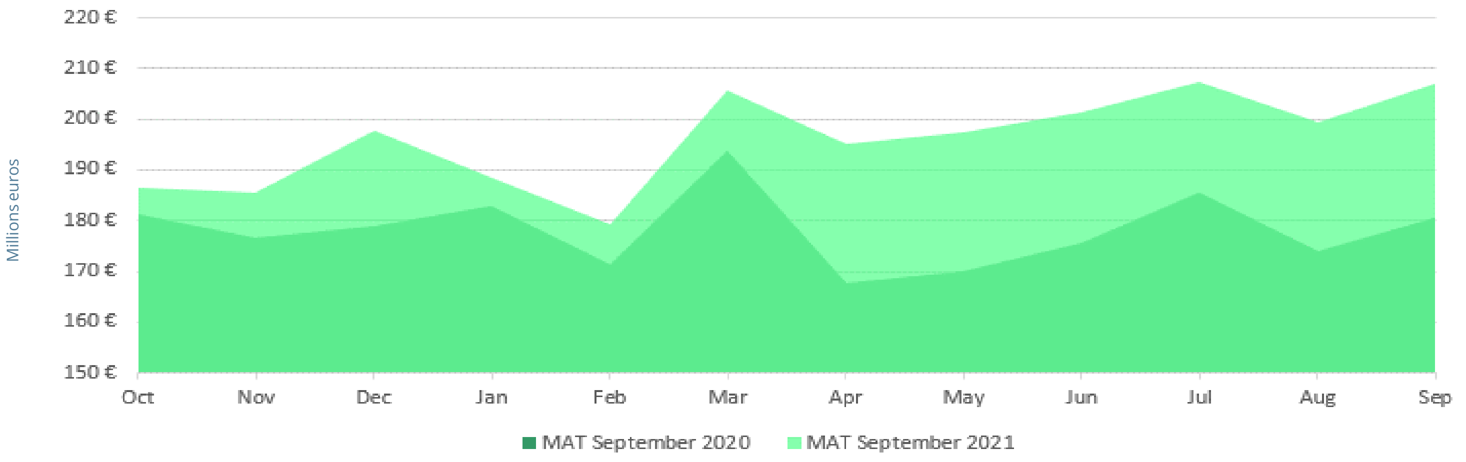
The growth in the Consumer Market continues to be driven by the Nutrition segment with a MAT growth of +7.3% in value and +10.4% in units.

Published on 12th October 2021

Total Market

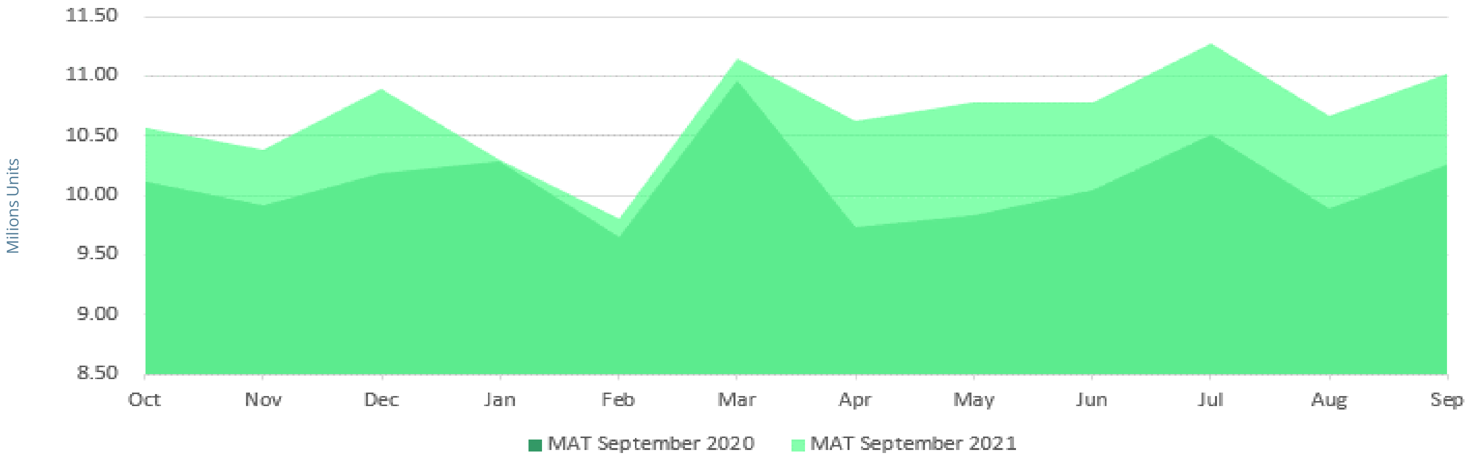
Monthly Evolution in Value

September 2020 – September 2021



Monthly Evolution in Units

September 2020 – September 2021



Compared to September 2020, the Total Market continues to register a more pronounced variation in value than in units (+14.7% and +7.4% respectively).

In September 2021, a positive evolution in terms of value and units sold is observed when compared to the month of August 2021 (+3.87% and +3.29% 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

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Highest Absolute Variations in Value | September 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs.	Var.
1	1	R07B - Cystic fibrosis products	9.2	83.6%
2	2	L04B - Anti-TNF products	2.5	15.2%
3	5	L04C - Interleukin inhibitors	1.9	31.4%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.8	19.0%
5	6	L01X - All other antineoplastics	1.1	17.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	6.8	137.9%
2	2	Kaftrio	5.9	100.0%
3	3	Amgevita	2.5	98.3%
4	4	Stelara	0.9	23.3%
5	9	Cosentyx	0.7	33.3%

Highest Absolute Variations in Units | September 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	53.7	10.6%
2	3	A02B - Antiulcerants	40.8	7.6%
3	2	C10A - Cholesterol and triglyceride regulating preparations	39.7	6.9%
4	5	N02B - Non-narcotics and anti-pyretics	31.0	8.7%
5	15	N05B - Hypnotics/sedatives	23.8	16.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	84.8	17.0%
2	16	Atorvastatin Accord	26.3	100.0%
3	80	Astilin	26.0	-
4	14	Esomeprazole Krka	25.5	48.5%
5	15	Paracetamol Accord	24.7	47.8%

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 +9.2 M€ (+83.6%) 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 +6.8 M€ (+137.9%) and Kaftrio® with +5.9 M€ (+100%).

The Anti-TNF products L04B class moves to second position this month with a positive variation of +2.5 M€ (+15.2%), with the Biosimilar medicine Amgevita® continuing to rank in the top 5 brands with a growth of +2.5 M€ (+98.3%).

The Interleukin inhibitors L04C drops to third place despite a positive variation of +1.9 M€ (+31.4%). Within this market, Stelara® continues to hold it's position in the top 5 brands with a growth +0.9 M€ (+23.3%) in relation to the homologous period of 2020. Additionally, within this market, Cosentyx® nw ranks in the top 5 brands with a growth of +0.7 M€ (33.3%) in relation to September 2020. Of note is that in September 2021, a new pack of Cosentyx® (300mg pre-fil pen) was approved for reimbursement under the High Tech Scheme.

The Anti-depressants and mood stabilisers class N06A consolidates its leading position in terms of highest absolute variation in units, with an absolute growth of +53.7 Thousand units (10.6%). Additionally, this ranking maintains the same players as the previous month with the Antiulcerants A02B class now holding second position in the ranking.

Worth highlighting is that Esomeprazole Krka now holds a position in the Top 5 brands with an absolute growth of +25.5 Thousand units (48.5%).

Pharma Market | High-Tech

Highest Absolute Variations in Value | September 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	9.2	83.6%
2	2	L04B - Anti-TNF products	2.5	15.3%
3	4	L04C - Interleukin inhibitors	1.9	31.4%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.8	19.0%
5	5	L01X - All other antineoplastics	1.1	17.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	6.8	137.9%
2	2	Kaftrio	5.9	100.0%
3	3	Amgevita	2.5	98.3%
4	4	Stelara	0.9	23.3%
5	8	Cosentyx	0.7	33.3%

Highest Absolute Variations in Units | September 2021

ATC3

rank var abs	rank valu e	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	3.8	20.3%
2	3	G03G - Gonadotrophins including other ovulation stimulants	1.7	16.9%
3	4	H01C - Hypothalamic hormones	1.3	17.1%
4	2	L04X - Other immunosuppressants	1.2	7.9%
5	7	L04C - Interleukin inhibitors	1.2	40.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Amgevita	3.4	99.1%
2	1	Cetrotide	1.1	100.0%
3	16	Hulio	0.9	108.8%
4	11	Cosentyx	0.7	39.4%
5	42	Kaftrio	0.6	-

As expected, the High-Tech Market continues to lead the overall Pharma Market in terms of absolute value variation. The ATC Classes ranking maintains the same players as demonstrated in August 2021 with the L04C class changing position with the L03B class. On the other hand, the Brand ranking maintains the same leaders up to fourth position, with Cosentyx® now claiming the last position in the ranking.

In terms of Highest Absolute Unit Variation the market maintains the same players for ATC Classes as demonstrated in last month's report, with the L04C class changing its position with H01C.

The Anti-TNF products L04B class remains at number one with the highest variation in units with +3.8 Thousand units (20.3%). Within this market, the Biosimilars Amgevita® and Hulio® continue to hold a strong position in the ranking of the top 5 brands with a variation of +3.4 Thousand units (99.1%) and +0.9 Thousand units (108.8%) respectively.

The G03G0 class, Gonadotrophins, including other ovulation stimulants, continues to rank in second place in the highest unit variation, with a growth of +1.7 Thousand units (+16.9%).

The H01C Class, Hypothalamic hormones steps up to third position with a variation of +1.3 Thousand units (17.1%). Within this market, Cetrotide® now ranks in second position in the top 5 brands with a growth of +1.1 Thousand units (100%) in relation to September 2020.

On the other hand, the L04C Class, Interleukin inhibitors, changes its position and now ranks in fifth place with a variation of +1.2 Thousand units (40.9%) with Cosentyx® now holding the fourth position in the brand ranking with a growth of +0.7 Thousand units (39.4%).

The Cystic Fibrosis drug Kaftrio®, now holds fifth position in the top 5 brands with highest absolute variation in units with an uplift of +0.6 Thousand units, having been approved for reimbursement in October 2020.

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | September 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	16	T03A - Diagnostic equipment and accessories	0.7	65.9%
2	2	B01F - Direct factor Xa inhibitors	0.6	10.3%
3	9	A10S - GLP-1 agonist antidiabetics	0.5	25.7%
4	17	A10P - SGLT2 inhibitor antidiabetics	0.4	32.7%
5	10	M05B - Bone calcium regulators	0.4	20.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.55	54.1%
2	1	Eliquis	0.54	100.0%
3	10	Dexcom	0.51	116.8%
4	2	Prolia	0.40	24.7%
5	20	Forxiga	0.22	49.1%

Highest Absolute Variations in Units | September 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	3	N06A - Anti-depressants and mood stabilisers	53.7	10.6%
2	2	A02B - Antiulcerants	40.8	7.6%
3	1	C10A - Cholesterol and triglyceride regulating preparations	39.7	6.9%
4	4	N02B - Non-narcotics and anti-pyretics	31.0	8.7%
5	14	N05B - Hypnotics/sedatives	23.8	16.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	84.8	17.0%
2	16	Atorvastatin Accord	26.3	100.0%
3	80	Astilin	26.0	-
4	14	Esomeprazole Krka	25.5	48.5%
5	15	Paracetamol Accord	24.7	47.8%

When analysing the Pharma Market, excluding the medicines reimbursed 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 +0.7 M€ (+65.9%). Within this market, Dexcom® continues to also rank in the Top 5 Brands with a variation of +0.51 M€ (116.8%).

The Direct factor Xa inhibitors B01F Class once again holds second place with a growth of +0.6 M€ (+10.3%). Within this class, Eliquis® is performing with a growth of +0.54 M€ (100%) 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 +0.5 M€ (25.7%) with Ozempic® stepping up to pole position with an observed growth of +0.55 M€ (54.1%) in relation to September 2020. The A10P SGLT2 inhibitors class maintains its position in fourth place with a variation of +0.4 M€ (32.7%), with Forxiga® also within the top 5 Brands with a variation of +0.22 M€ (49.1%).

The Bone calcium regulators class M05B now holds a position in the top 5 ATC Classes performing with a variation in value of +0.4 M€ (+20.4%). This growth is predominantly being lead by Prolia® which is performing with a growth of +0.4 M€ (+24.7%) in comparison to last year's homologous period.

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.

Esomeprazole Krka now holds a position on the Top 5 brands with an absolute growth of +25.5 Thousand units (48.5%).

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Pharma Market | Generic

Highest Absolute Variations in Value | September 2021

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	2	Rosuvastatin	0.10	10.5%
2	44	Posaconazole	0.10	531.3%
3	1	Atorvastatin	0.10	7.7%
4	9	Sertraline	0.09	29.6%
5	18	Amoxicillin	0.07	36.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.11	62.5%
2	1	Rosuvastatin Teva Pharma	0.11	100.0%
3	6	Escitalopram Teva	0.10	55.7%
4	7	Omeprazole Teva	0.08	46.4%
5	11	Olanzapine Teva	0.07	54.2%

Highest Absolute Variations in Units | September 2021

INN's

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	11	Paracetamol	26.1	48.8%
2	9	Sertraline	23.0	30.9%
3	1	Atorvastatin	21.9	7.4%
4	12	Omeprazole	18.9	33.0%
5	3	Rosuvastatin	16.2	10.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	5	Atorvastatin Accord	26.3	55.9%
2	4	Paracetamol Accord	24.7	100.0%
3	8	Escitalopram Teva	23.7	56.7%
4	7	Omeprazole Teva	21.1	46.4%
5	2	Rosuvastatin Teva Pharma	17.1	23.1%

Rosuvastatin and Posaconazole continue to lead the top 5 INNs with highest absolute variation in value. This month, Rosuvastatin and Posaconazole both perform with a growth of +0.1 M€.

Amoxicillin now ranks in fifth position, performing with an absolute variation in value of +0.07 M€ (+36.2%) in comparison to last year's homologous period. This behaviour might potentially be explained by the lifting of COVID-19 restrictions. As a reminder that last year's restrictions were associated with a substantial reduction in community dispensing of antibiotics.

In relative terms, Atorvastatin, Rosuvastatin 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€ (62.5%) and in units of +26.3 Thousand Units (55.9%).

In terms of highest absolute variation in units, the INN and Brand rankings perform with the same players and similar variations to those of August 2021.

Top 5 Companies |By Sell-Out Value

Highest Absolute Variations in Value | September 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex Pharma UK	9.18	83.6%
2	5	Amgen	2.90	39.9%
3	2	Janssen-Cilag	2.27	20.8%
4	3	Novartis	1.67	15.8%
5	4	Bristol-Myers Squibb	1.03	10.3%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	Novo Nordisk	0.71	18.4%
2	17	Krka Pharma	0.56	35.0%
3	7	Bristol-Myers Squibb	0.53	16.6%
4	33	DexCom	0.51	116.8%
5	19	Amgen	0.41	25.2%

Highest Absolute Variations in Value | September 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex Pharma UK	9.18	83.6%
2	4	Amgen	2.49	44.2%
3	2	Janssen-Cilag	2.20	22.6%
4	3	Novartis	1.55	18.7%
5	13	AstraZeneca Pharma	0.62	55.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Teva Pharma Ind	0.42	10.6%
2	5	Krka Pharma	0.42	35.2%
3	3	Clonmel HC	0.30	15.0%
4	2	Accord HC	0.26	6.8%
5	4	Rowa	0.18	10.9%

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In the total Pharma and High Tech Markets, Vertex continues to rank first in value, consolidating its position with a growth of +9.18 M€ (83.6%).

Amgen once again changes its position with Jassen-Cilag and now ranks second in both the total Pharma and the High Tech Markets with an observed growth of +2.9 M€ (39.9%) and +2.49 M€ (44.2%) respectively.

Jassen-Cilag has moved to third place and continues to experience a significant value growth of +2.27 M€ (20.8%) in the total Pharma Market and of +2.20 M€ (22.6%) in the High Tech Market.

Bristol-Myers Squibb now holds fifth position in the Pharma Market, with an observed growth of +1.03 M€ (10.3%).

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the situation remains similar to the one observed in August 2021 with Novo Nordisk leading with the highest absolute variation in value at +0.71 M€ (18.4%) in relation to the homologous period of 2020. Additionally, Krka Pharma steps up from fourth to second position in the rankings. On the other hand, Bristol-Myers Squibb and Dexcom have moved down to third and fourth place respectively. Amgen now holds fifth position in this market, performing with an observed growth of +0.41 M€ (25.2%).

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

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | September 2021

Pharma Market

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Nutricia MD	107.7	12.4%
2	11	Krka Pharma	80.5	28.0%
3	1	Teva Pharma Ind	79.4	8.6%
4	4	Clonmel HC	78.5	9.4%
5	10	Sanofi	40.6	12.1%

Pharma Market | Excluding High Tech

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Nutricia MD	107.7	12.4%
2	11	Krka Pharma	80.5	28.0%
3	1	Teva Pharma Ind	79.3	8.7%
4	4	Clonmel HC	78.4	9.4%
5	10	Sanofi	40.6	12.1%

Highest Absolute Variations in Units | September 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Amgen	4.05	33.8%
2	1	Merck	2.20	14.2%
3	3	Novartis	1.75	25.7%
4	9	Janssen-Cilag	1.03	36.6%
5	12	Viatris	0.92	66.0%

Pharma Market | Generic

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	1	Teva Pharma Ind	68.8	9.7%
2	3	Clonmel HC	57.2	15.5%
3	5	Krka Pharma	56.2	27.7%
4	2	Accord HC	48.4	7.2%
5	4	Rowa	29.2	9.2%

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In the total Pharma Market, Nutricia MD now holds first position with the highest variation in units, performing with a growth of +107.7 Thousand units (12.4%). Krka Pharma also steps up from fourth to second position in the rakings with a significant growth in relation to the homologous period of 2020 achieving +80.5 Thousand units (28.0%).

Teva maintain its position in the Pharma Market ranking while Clonmel, previously occupying first position, is now performing in fourth place with a registered growth of +78.5 Thousand units (9.4%).

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 once again leading with an absolute variation of +4.05 Thousand units (33.8%) followed by Merck with an absolute variation of +2.20 Thousand units (14.2%). Novartis changes its position with Jassen-Cilag and now ranks in third place in the High Tech Market ranking, demonstrating a growth of +1.75 Thousand units (25.7%).

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

Published on 12th October 2021

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