Market Watch Ireland

October 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 analyze the market.

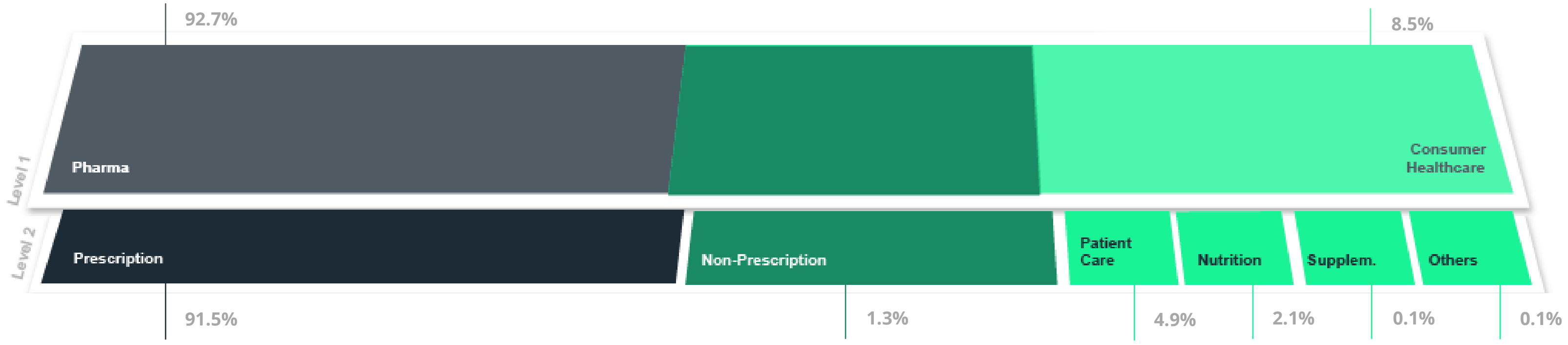
Because we believe that the power of knowledge grows when it is shared. And can change lives.

Total Market

Dynamics of the Pharmacy Channel

October 2021

Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	October 2021						MAT October 2021					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**202.9 €**	**100.0%**	**8.7%**	**10.9**	**100.0%**	**2.8%**	**2,367.6 €**	**100.0%**	**10.4%**	**128.5**	**100.0%**	**5.5%**
Pharma Market	**188.1 €**	**92.7%**	9.4%	**8.7**	**80.3%**	3.9%	**2189.4**	**92.5%**	11.0%	**101.8**	**79.2%**	5.1%
Consumer Healthcare	**17.3 €**	**8.5%**	-0.4%	**2.6**	**23.5%**	-1.6%	**209.6**	**8.9%**	4.2%	**31.8**	**24.7%**	6.2%
Prescription Medicines	185.5 €	91.5%	9.6%	8.3	76.5%	4.2%	2,158.0 €	91.1%	11.1%	96.8	75.3%	5.2%
Branded	168.2 €	82.9%	10.0%	5.3	48.6%	3.2%	1,954.0 €	82.5%	11.3%	61.4	47.7%	3.0%
Generic	17.4 €	8.6%	6.2%	3.0	27.9%	6.1%	204.0 €	8.6%	9.5%	35.4	27.6%	9.5%
Non Prescription (OTC)	2.6 €	1.3%	0.1%	0.4	3.8%	-1.8%	31.4 €	1.3%	4.0%	5.0	3.9%	2.4%
Branded	2.4 €	1.2%	-0.6%	0.4	3.4%	-2.3%	28.9 €	1.2%	1.4%	4.4	3.5%	-1.1%
Generic	0.2 €	0.1%	7.6%	0.04	0.4%	2.3%	2.5 €	0.1%	47.3%	0.5	0.4%	46.5%
Nutrition	4.3 €	2.1%	-3.2%	1.6	14.8%	-1.4%	54.7 €	2.3%	6.1%	20.1	15.7%	8.9%
Patient Care	9.9 €	4.9%	0.8%	0.5	4.6%	-1.6%	117.4 €	5.0%	3.6%	6.3	4.9%	1.7%
Supplements	0.2 €	0.1%	3.7%	0.02	0.2%	-0.8%	2.8 €	0.1%	1.8%	0.2	0.2%	2.9%
Others	0.3 €	0.1%	-4.0%	0.01	0.1%	-8.2%	3.3 €	0.1%	-1.9%	0.2	0.1%	-3.2%

The dispensary retail market in October 2021 increased by +8.7% in value and +2.8% in units, when compared to the same period of the previous year.

The Pharma Market represents 92.7% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.5% and 1.3% respectively.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +11% in value and +5.1% in units while the Consumer Market is growing +4.2% in value and +6.2% in units.

Branded POM continues to consolidate its position as the main driver for the Pharma Market with MAT value growth at +11.3%. Generic POM sees an increase of +9.5% while both OTCs Branded and Generics show a total increase of +4.0%.

In units, POM sees a MAT increase of +3% for Branded and +9.5% for Generic medicines. OTCs Branded sees a decrease of -1.1% and OTC Generics an increase of +46.5% in units.

The Consumer Market currently represents 8.5% of the total dispensary market, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 4.9% and 2.1% respectively.

The growth in the Consumer Market continues once again to be driven by the Nutrition segment with a MAT growth of +6.1% in value and +8.9% in units.

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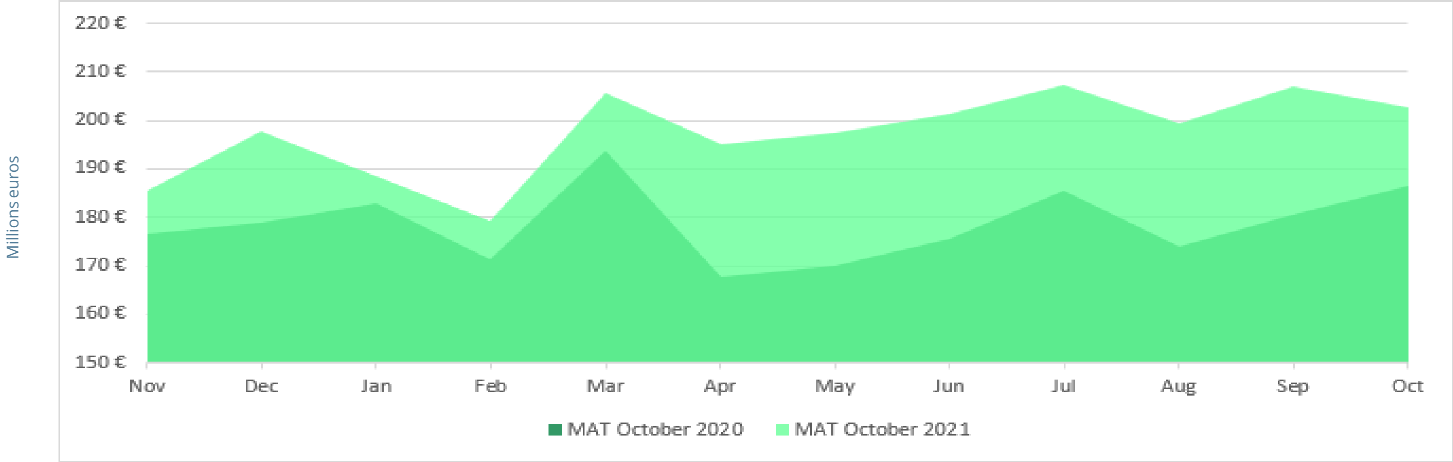
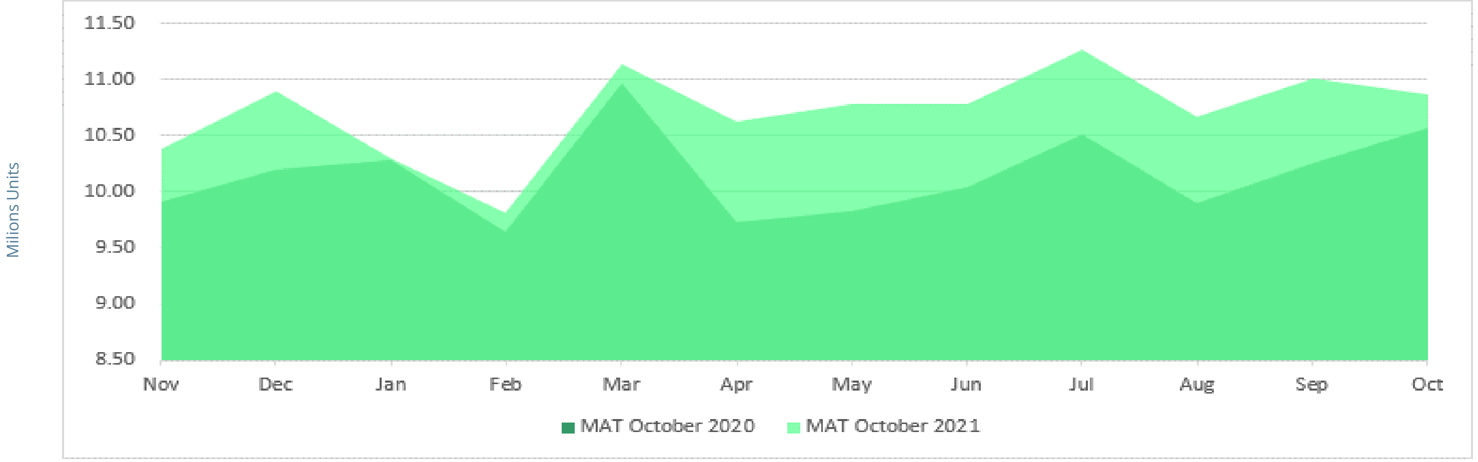
Total Market

Monthly Evolution in Value
October 2020 – October 2021



Monthly Evolution in Units
October 2020 – October 2021



Compared to October 2020, the Total Market continues to register a more pronounced variation in value than in units (+8.7% and +2.8% respectively).

In October 2021, a decline in terms of value and units sold is observed when compared to the month of September 2021 (Previous Period Growth of -2.02% and -1.33% respectively).

Despite the decline in relation to September 2021, the Sell Out MAT in value and units continues to substantially exceed the recorded values in the homologous period of 2020. However, it is also possible to observe an alteration on the seasonality trend for the month of October, when compared to the behavior registered in 2020.

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Pharma Market

Highest Absolute Variations in Value | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	6.2	53.2%
2	5	L04C - Interleukin inhibitors	2.0	33.2%
3	1	L04B - Anti-TNF products	1.8	11.1%
4	6	L01X - All other antineoplastics	0.9	13.5%
5	3	L01H - Protein kinase inhibitor antineoplastics	0.8	7.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	5.3	-
2	1	Kalydeco	4.3	100.0%
3	4	Amgevita	2.1	77.1%
4	3	Stelara	1.1	29.9%
5	18	Ozempic	0.6	56.2%

Highest Absolute Variations in Units | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	64.9	83.4%
2	4	N06A - Anti-depressants and mood stabilisers	30.8	5.9%
3	19	J07E - Viral vaccines	26.7	29.2%
4	50	G03C - Oestrogens excluding G3A G3E G3F	18.5	78.7%
5	15	N05B - Hypnotics/sedatives	16.7	10.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	46	Fluad	38.3	-
2	1	Fortisip	29.6	100.0%
3	61	Oramox	27.7	466.1%
4	16	Atorvastatin Accord	24.8	50.1%
5	100	Astilin	22.0	-

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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 +6.2 M€ (+53.2%) in relation to the homologous period of 2020. Kaftrio® and Kalydeco® lead the brand ranking, Kaftrio® with +5.3 M€ and Kalydeco® with +4.3 M€ (+100%).

The Interleukin inhibitors L04C class rises to second position this month with a positive variation of +2.0 M€ (+33.2%). Within this market, Stelara® continues to hold fourth position in the top 5 brands with a growth +1.1 M€ (+29.9%) in relation to the homologous period of 2020.

This month the Anti-TNF products L04B class drops to third position with a positive variation of +1.8 M€ (+11.1%), with the Biosimilar medicine Amgevita® ranking in the top 5 brands with a growth of +2.1 M€ (+77.1%).

Worth highlighting is the diabetes drug Ozempic® that ranks in the top 5 brands with a growth of +0.6 M€ (56.2%) in relation to October 2020.

The Broad spectrum penicillin J01C Class, now holds first position in terms of highest absolute variation in units, with an absolute growth of +64.9 Thousand units (83.4%). Within this market, Oramox lies in third place in the brand ranking with an observed growth of 27.7 Thousand units (466.1%) in comparison to last year's homologous period.

Following the beginning of 2021/2022 seasonal vaccination programme, the Class J07E Viral vaccines now holds a position in the top ATC ranking with an absolute variation of +26.7 Thousand units (+29.2%). Worth noticing is that within this market, Fluad® Tetra holds first position in the brand ranking with an absolute growth of +38.3 Thousand units.

Pharma Market | High-Tech

Highest Absolute Variations in Value | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	6.2	53.2%
2	4	L04C - Interleukin inhibitors	2.0	33.2%
3	1	L04B - Anti-TNF products	1.8	11.2%
4	5	L01X - All other antineoplastics	0.9	13.4%
5	3	L01H - Protein kinase inhibitor antineoplastics	0.8	7.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	5.3	-
2	1	Kalydeco	4.3	100.0%
3	4	Amgevita	2.1	77.1%
4	3	Stelara	1.1	29.9%
5	8	Cosentyx	0.5	25.7%

Highest Absolute Variations in Units | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	3.0	15.4%
2	6	L04C - Interleukin inhibitors	1.0	34.6%
3	17	R07B - Cystic fibrosis products	0.6	60.5%
4	15	C06B - Pulmonary arterial hypertension products	0.4	26.9%
5	2	L04X - Other immunosuppressants	0.4	2.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Amgevita	3.0	77.6%
2	15	Hulio	0.8	100.0%
3	35	Veletri	0.7	496.1%
4	46	Kaftrio	0.6	-
5	10	Cosentyx	0.5	26.4%

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 September 2021 with the L03B class changing position once again with the L04C class. On the other hand, the Brand ranking also maintains the same players as September 2021, with Kaftrio® holding now in first position.

In terms of Highest Absolute Unit Variation the market maintains the Anti-TNF L04B class in first position with a growth of +3.0 Thousand Units (15.4%). Within this market, the Biosimilars Amgevita® and Hulio® continue to rank in the top 5 brands with a variation of +3.0 Thousand units (77.6%) and +0.8 Thousand units (100%).

The L04C Class, Interleukin inhibitors steps up to second position in the ranking with a variation of +1.0 Thousand units (34.6%). Cosentyx® now holds fifth position in the brand ranking with a growth of +0.5 Thousand units (26.4%).

The Cystic fibrosis products R07B class, now holds third position in the ranking with a growth of +0.6 Thousand units (+60.5%). Within this market, Kaftrio® continues to rank, amongst the top 5 Brands with an uplift of +0.6 Thousand units, having been approved for reimbursement in October 2020.

Also worth noticing is the performance observed in the C06B Class. The Pulmonary arterial hypertension (PAH) market now holds fourth position in the ranking with a variation of +0.4 Thousand units (26.9%). The PAH drug Veletri® jumps to third position in the brand ranking with a growth of +0.7 Thousand Units (496.1%).

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Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	14	T03A - Diagnostic equipment and accessories	0.7	59.3%
2	9	A10S - GLP-1 agonist antidiabetics	0.5	24.7%
3	2	B01F - Direct factor Xa inhibitors	0.5	8.3%
4	22	J07E - Viral vaccines	0.4	37.3%
5	16	A10P - SGLT2 inhibitor antidiabetics	0.4	27.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.58	56.2%
2	9	Dexcom	0.49	100.0%
3	1	Eliquis	0.39	11.5%
4	3	Prolia	0.29	17.7%
5	19	Forxiga	0.22	47.9%

Highest Absolute Variations in Units | October 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	64.9	83.4%
2	4	N06A - Anti-depressants and mood stabilisers	30.8	5.9%
3	19	J07E - Viral vaccines	26.7	29.2%
4	50	G03C - Oestrogens excluding G3A G3E G3F	18.5	78.7%
5	15	N05B - Hypnotics/sedatives	16.7	10.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	46	Fluad	38.3	-
2	1	Fortisip	29.6	100.0%
3	61	Oramox	27.7	466.1%
4	16	Atorvastatin Accord	24.8	50.1%
5	100	Astilin	22.0	-

health market research

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€ (+59.3%). Within this market, Dexcom® continues to rank in the Top 5 Brands with a variation of +0.49 M€ (100%).

The antidiabetic classes, A10S steps up to second position in the value rankings. The Class A10S GLP-1 agonists now presents a variation of +0.5 M€ (24.7%) with Ozempic® observing a growth of +0.58 M€ (56.2%) in relation to October 2020. Within the diabetes market, the A10S SGLT2 inhibitors class is now holding fifth position with a performance of +0.4 M€ (27.7%) with Forxiga® maintaining fifth position within the top 5 Brands with a positive variation of +0.22 M€ (47.9%).

The Direct factor Xa inhibitors B01F Class steps down to third position in the ranking with a growth of +0.5 M€ (+8.3%). Within this class, Eliquis® is performing with a growth of +0.39 M€ (11.5%) 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.

The Top 5 brands with Highest Absolute Variation in units this month includes two new players such as Fluad® Tetra and Oramox with an absolute growth of +38.2 Thousand units and 27.7 Thousand units respectively.

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Pharma Market | Generic

Highest Absolute Variations in Value | October 2021

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	13	Amoxicillin	0.18	111.8%
2	43	Posaconazole	0.07	176.0%
3	9	Sertraline	0.07	21.0%
4	18	Omeprazole	0.06	29.3%
5	2	Rosuvastatin	0.04	4.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.11	57.2%
2	21	Oramox	0.10	100.0%
3	6	Escitalopram Teva	0.09	48.8%
4	16	Pinamox	0.08	80.1%
5	1	Rosuvastatin Teva Pharma	0.08	16.1%

Highest Absolute Variations in Units | October 2021

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	15	Amoxicillin	39.5	238.5%
2	11	Paracetamol	17.0	26.9%
3	9	Sertraline	17.0	21.5%
4	13	Omeprazole	15.9	27.3%
5	1	Atorvastatin	7.9	2.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	21	Oramox	27.7	466.1%
2	5	Atorvastatin Accord	24.8	100.0%
3	8	Escitalopram Teva	21.1	49.1%
4	7	Omeprazole Teva	19.2	41.7%
5	13	Lercanidipine Clonmel	16.9	60.0%

Within the top 5 INNs with highest absolute variation in value are Amoxicillin and Posaconazole with a growth of +0.18 M€ and +0.07 M€ respectively, in comparison to last year's homologous period.

In relative terms, Amoxicillin, Sertraline and Omeprazole perform with marked positive variations, both in value and units.

Atorvastatin Accord continues to lead the Brand ranking recording the highest variations in value of +0.11 M€ (57.2%) while Oramox leads in terms of highest variations in units with a growth of +27.7 Thousand Units (466.1%).

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Top 5 Companies | By Sell-Out Value

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Highest Absolute Variations in Value | October 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	6.17	53.2%
2	5	Amgen	2.21	29.1%
3	2	Janssen	2.05	18.6%
4	3	Novartis	1.11	10.1%
5	4	Bristol Myers Squibb	0.67	6.4%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	Novo Nordisk	0.50	12.4%
2	33	DexCom	0.49	99.8%
3	17	KRKA	0.44	25.7%
4	8	Bristol Myers Squibb	0.40	12.0%
5	19	Amgen	0.29	18.0%

Highest Absolute Variations in Value | October 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	6.17	53.2%
2	2	Janssen	2.02	20.6%
3	4	Amgen	1.92	32.1%
4	3	Novartis	1.00	11.6%
5	11	Astellas	0.40	18.9%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	5	KRKA	0.36	28.7%
2	1	Teva	0.29	7.2%
3	6	Pinewood	0.19	14.7%
4	3	Clonmel	0.19	9.1%
5	4	Rowa	0.12	7.2%

In both the total Pharma Market and the High Tech Market, Vertex continues to rank first in value, consolidating it's position with a growth of +6.17 M€ (53.2%).

Amgen continues to experience a significant value growth of +2.21 M€ (29.1%) in the total Pharma Market and of +1.92 M€ (32.1%) in the High Tech Market. Janssen holds third position in the total Pharma Market with a value growth of +2.05 M€ (18.6%) while it changes its previous position with Amgen in the High Tech Market performing with an observed growth of +2.02 M€ (20.6%).

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the situation remains similar to the one observed in September 2021 with Novo Nordisk leading with the highest absolute variation in value at +0.5 M€ (12.4%) in relation to the homologous period of 2020. DexCom steps up from fourth to second position in the ranking while Krka and Bristol Myers Squibb step down to third and fourth place respectively. On the other hand, Amgen maintains the same position as showed in September 2021.

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

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | October 2021

Pharma Market

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	11	KRKA	60.3	20.0%
2	1	Teva	57.4	6.2%
3	2	Clonmel	54.8	6.4%
4	47	Seqirus	38.3	-
5	41	Azure	34.4	278.5%

Pharma Market | Excluding High Tech

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	11	KRKA	60.3	20.0%
2	1	Teva	57.4	6.2%
3	2	Clonmel	54.7	6.4%
4	46	Seqirus	38.3	-
5	41	Azure	34.4	278.5%

Highest Absolute Variations in Units | October 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Amgen	2.62	20.4%
2	9	Janssen	1.30	44.8%
3	4	Novartis	1.14	16.0%
4	21	PCO	0.63	117.0%
5	19	Vertex	0.57	60.5%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Teva	47.6	6.7%
2	5	KRKA	45.5	21.6%
3	3	Clonmel	41.7	10.9%
4	6	Pinewood	31.8	16.3%
5	9	Fannin	28.2	148.1%

In the total Pharma Market, Krka now holds first position with the highest variation in units, performing with a growth of +60.3 Thousand units (20.0%). Teva holds second position, continuing to perform with a significant growth in relation to the homologous period of 2020 achieving +57.4 Thousand units (6.2%). Also worth noting is that Seqirus and Azure now hold a position in the ranking.

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

A different picture is captured for the High Tech Market, with Amgen once again leading this market with an absolute variation of +2.62 Thousand units (20.4%) followed by Janssen with an absolute variation of +1.30 Thousand units (44.8%). Also worth noting is that PCO and Vertex now hold a position in the High Tech Market ranking, demonstrating growths of +0.63 and +0.57 Thousand units respectively.

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

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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