Market Watch Ireland

November 2021

Filipe Infante
Country Manager

Knowledge for better health

We believe in the power of Knowledge.

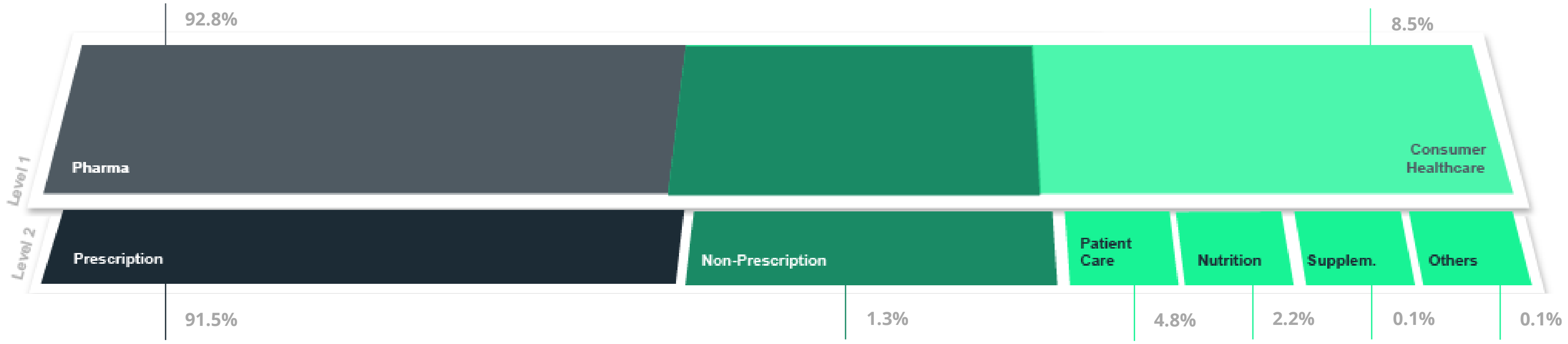
A deep knowledge of the market is the first step to deliver unique market insights. It's that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyze the market.

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

Total Market

Dynamics of the Pharmacy Channel

November 2021
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	November 2021						MAT November 2021					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	211.8 €	100.0%	14.1%	11.3	100.0%	8.5%	2,393.8 €	100.0%	11.2%	129.4	100.0%	5.8%
Pharma Market	196.5 €	92.8%	14.9%	9.0	80.3%	11.0%	2214.9	92.5%	11.8%	102.6	79.3%	5.9%
Consumer Healthcare	18.0 €	8.5%	5.0%	2.6	23.5%	-0.2%	210.5	8.8%	4.0%	31.8	24.5%	5.0%
Prescription Medicines	193.8 €	91.5%	15.0%	8.6	76.5%	11.4%	2,183.3 €	91.2%	11.9%	97.7	75.5%	6.1%
Branded	175.7 €	82.9%	15.3%	5.5	48.6%	11.1%	1,977.4 €	82.6%	12.1%	61.9	47.8%	4.0%
Generic	18.1 €	8.5%	12.2%	3.2	28.0%	11.9%	205.9 €	8.6%	10.1%	35.7	27.6%	9.8%
Non Prescription (OTC)	2.7 €	1.3%	5.6%	0.4	3.8%	2.7%	31.6 €	1.3%	4.2%	5.0	3.9%	2.4%
Branded	2.5 €	1.2%	5.3%	0.4	3.4%	2.6%	29.0 €	1.2%	1.8%	4.5	3.4%	-0.8%
Generic	0.2 €	0.1%	9.2%	0.05	0.4%	3.5%	2.5 €	0.1%	41.4%	0.5	0.4%	39.6%
Nutrition	4.6 €	2.2%	0.8%	1.7	14.8%	-0.5%	54.8 €	2.3%	4.9%	20.1	15.6%	7.0%
Patient Care	10.3 €	4.8%	6.9%	0.5	4.6%	-1.2%	118.0 €	4.9%	3.8%	6.3	4.8%	1.1%
Supplements	0.2 €	0.1%	3.9%	0.02	0.2%	0.8%	2.8 €	0.1%	1.9%	0.2	0.2%	1.9%
Others	0.3 €	0.1%	6.0%	0.01	0.1%	-8.4%	3.3 €	0.1%	0.5%	0.2	0.1%	-3.8%

HMR health market research

The dispensary retail market in November 2021 increased by +14.1% in value and +8.5% in units, when compared to the same period of the previous year.

The Pharma Market currently represents 92.8% of the total dispensary retail market with Prescription and Non-prescription medicines continuing to represent 91.5% and 1.3% respectively.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +11.8% in value and +5.9% in units while the Consumer Market is growing +4.0% in value and +5.0% in units.

Branded POM continues to consolidate it’s position as the main driver of the Pharma Market with MAT value growth at +12.1%. Generic POM sees an increase of +10.1% while both OTCs Branded and Generics show a total increase of +4.2%.

In units, POM sees a MAT increase of +4.0% for Branded and +9.8% for Generic medicines. OTCs Branded sees a decrease of -0.8% and OTC Generics an increase of +39.6% in units.

The Consumer Market continues to represent 8.5% of the total dispensary market, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 4.8% and 2.2% respectively.

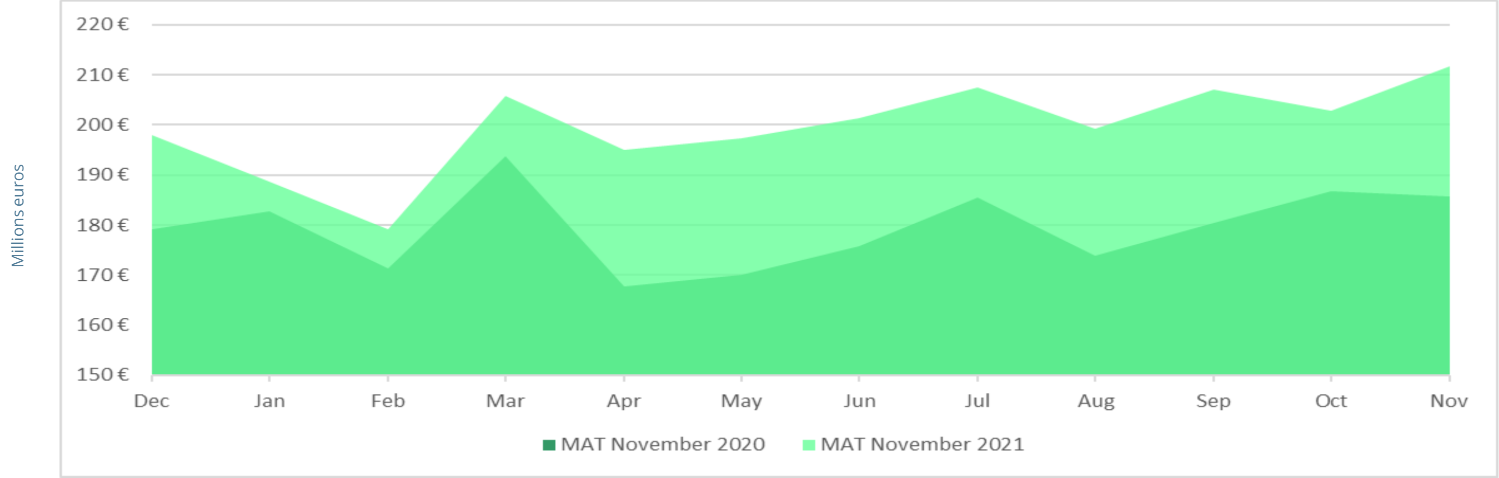
The growth in the Consumer Market continues to be steadily driven by the Nutrition segment, now performing with a MAT growth of +4.9% in value and +7.0% in units.

Published on 10th December 2021

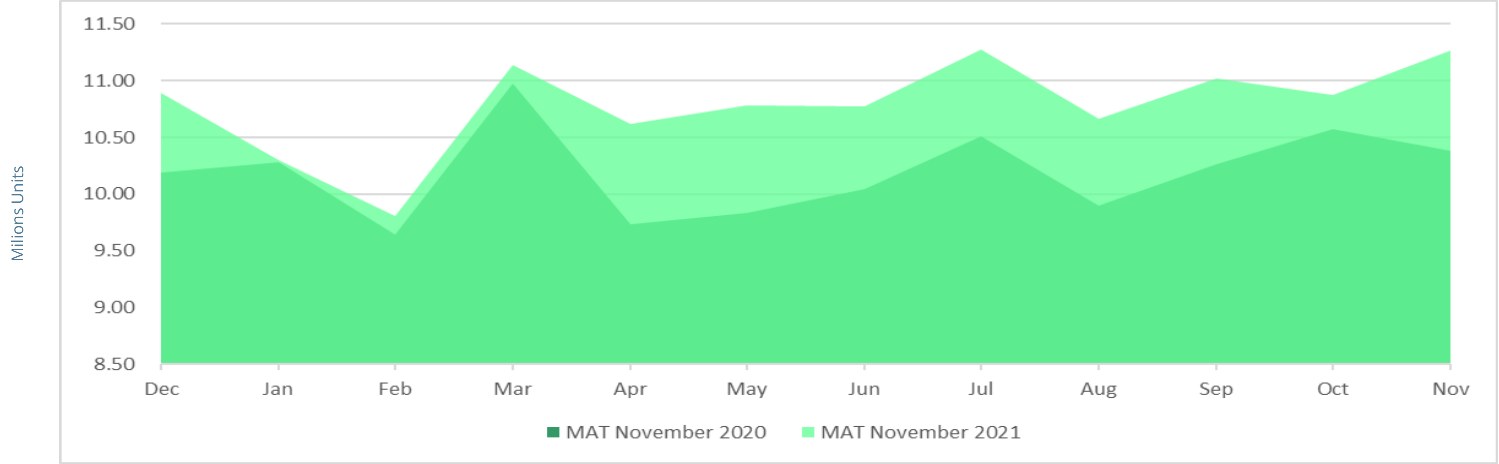
Total Market

health market research

Monthly Evolution in Value
November 2020 – November 2021



Monthly Evolution in Units
November 2020 – November 2021



Compared to November 2020, the Total Market continues to register a more pronounced variation in value than in units (+14.1% and +11% respectively).

In November 2021, a positive evolution in terms of value and units sold is observed when compared to the month of October 21 (+4.42% and +3.62% respectively).

Despite the decline observed in October, the Sell Out MAT value and units have now returned to a growth trend demonstrating the consolidation of the market.

Published on 10th December 2021

Pharma Market

Highest Absolute Variations in Value | November 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	4.6	30.4%
2	2	L04B - Anti-TNF products	2.9	18.0%
3	5	L04C - Interleukin inhibitors	2.0	34.4%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.6	16.9%
5	6	L01X - All other antineoplastics	1.4	21.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	3.6	47.8%
2	2	Kaftrio	3.3	100.0%
3	3	Amgevita	2.2	73.9%
4	4	Stelara	1.0	26.3%
5	5	Revlimid	0.7	19.3%

Highest Absolute Variations in Units | November 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	73.7	106.6%
2	4	N06A - Anti-depressants and mood stabilisers	62.8	12.2%
3	2	C10A - Cholesterol and triglyceride regulating preparations	53.6	9.2%
4	3	A02B - Antiulcerants	41.2	7.5%
5	31	J07E - Viral vaccines	31.2	61.1%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	42.5	8.1%
2	16	Atorvastatin Accord	31.1	100.0%
3	3	Eltroxin	25.6	8.7%
4	5	Ventolin	25.0	21.3%
5	21	Stilnoct	23.6	58.3%

HMR health market research

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 +4.6 M€ (+30.4%) 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 +3.6 M€ (+47.8%) and Kaftrio® with +3.3 M€ (+100%).

This month the Anti-TNF products L04B class ranks in second position with a positive variation of +2.9 M€ (+18.0%), with the Biosimilar medicine Amgevita® ranking in the top 5 brands with a growth of +2.2 M€ (+73.9%).

The Interleukin inhibitors L04C class drops from second to third position with a positive variation of +2.0 M€ (+34.4%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +1.0 M€ (+26.3%) in relation to the homologous period of 2020.

The antineoplastic drug Revlimid® returns, once again, to the top 5 brands with highest absolute variation in value, with an observed growth of +0.7 M€ (19.3%) in relation to November 2020.

The Broad spectrum penicillin J01C Class continues to hold, once again, first position in terms of highest absolute variation in units, with an absolute growth of +73.7 Thousand units (106.6%) followed by the N06A Anti-depressants and mood stabilisers class with an absolute growth of +62.8 Thousand units (12.2%).

The Class C10A Cholesterol and triglyceride regulation preparations now holds third position in the top ATC ranking with an absolute variation of +53.6 Thousand units (+9.2%). Within this market, Atorvastatin Accord holds second position in the brands ranking with an observed growth of 31.1 Thousand units (100%) in comparison to last year's homologous period.

In the Top 5 of brands with the Highest absolute variation in units, Fortisip® leads with a variation of +42.5 M units (8.1%).

Pharma Market | High-Tech

health market research

Highest Absolute Variations in Value | November 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	4.6	30.4%
2	2	L04B - Anti-TNF products	2.9	18.0%
3	4	L04C - Interleukin inhibitors	2.0	34.4%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.6	16.9%
5	5	L01X - All other antineoplastics	1.4	20.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	1	Kalydeco	3.6	47.8%
2	2	Kaftrio	3.3	100.0%
3	3	Amgevita	2.2	73.9%
4	4	Stelara	1.0	26.3%
5	5	Revlimid	0.7	19.3%

Highest Absolute Variations in Units | November 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	4.1	21.8%
2	2	L04X - Other immunosuppressants	1.5	9.3%
3	3	G03G - Gonadotrophins including other ovulation stimulants	1.3	18.6%
4	7	L04C - Interleukin inhibitors	1.2	40.5%
5	15	C06B - Pulmonary arterial hypertension (PAH) products	0.5	34.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	3.1	74.4%
2	15	Hulio	0.8	100.0%
3	10	Cosentyx	0.7	35.6%
4	37	Veletri	0.6	302.3%
5	7	Benepali	0.6	22.1%

The High-Tech Market continues to leads the overall Pharma Market in terms of absolute value variation. The ATC Classes ranking maintains the same players as demonstrated in October 2021 with the L03B class changing position once again with the L04C class. Similarly, the Brand ranking also maintains the same players as October 2021, with Kalydeco® now holding first position.

In terms of Highest Absolute Unit Variation the Anti-TNF L04B class maintains first position in the market with a growth of +4.1 Thousand Units (21.8%). Within this market, the Biosimilars Amgevita®, Hulio® and Benepali® rank in the top 5 brands.

Worth highlighting is the performance observed in the L04X Class, that now holds second position in the ranking with a growth of +1.5 Thousand units (+9.3%).

The G03G class, Gonadotrophins, including other ovulation stimulants, performs in third position with an uplift of +1.3 Thousand units (18.6%) in relation to the homologous period of 2020.

The L04C and C06B Classes maintain a position in the ranking with a variation of +1.2 Thousand units (40.5%) and +0.5 Thousand units (34.2%) respectively. Within these markets, Cosentyx® (L04C) and Veletril® (C06B) hold third and fourth position in the brand ranking.

Pharma Market | Excluding High Tech

health market research

Highest Absolute Variations in Value | November 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	B01F - Direct factor Xa inhibitors	0.8	14.0%
2	14	T03A - Diagnostic equipment and accessories	0.8	67.4%
3	9	A10S - GLP-1 agonist antidiabetics	0.7	35.1%
4	23	J07E - Viral vaccines	0.6	89.7%
5	15	A10P - SGLT2 inhibitor antidiabetics	0.6	39.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.72	69.8%
2	1	Eliquis	0.60	100.0%
3	9	Dexcom	0.52	99.0%
4	18	Forxiga	0.28	60.8%
5	8	Medtronic	0.28	34.0%

Highest Absolute Variations in Units | November 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	73.7	106.6%
2	4	N06A - Anti-depressants and mood stabilisers	62.8	12.2%
3	2	C10A - Cholesterol and triglyceride regulating preparations	53.6	9.2%
4	3	A02B - Antiulcerants	41.2	7.5%
5	31	J07E - Viral vaccines	31.2	61.1%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	42.5	8.1%
2	16	Atorvastatin Accord	31.1	100.0%
3	3	Eltroxin	25.6	8.7%
4	5	Ventolin	25.0	21.3%
5	21	Stilnoct	23.6	58.3%

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the Direct factor Xa inhibitors B01F Class leads the top 5 ATC Classes with the highest absolute variation in value of +0.8 M€ (+14.0%). Within this market, Eliquis® continues to rank in the Top 5 Brands with a variation of +0.6 M€ (100%).

The Diagnostic equipment and accessories T03A class drops to second position with a variation in value of +0.8 M€ (+67.4%). Within this market, both Dexcom® and Medtronic® seem to be contributing to the observed growth in this market as they also rank in the Top 5 Brands with a variation of +0.52 M€ (99%) and +0.28 M€ (34%) respectively.

The antidiabetic classes, A10S and A10P maintain a position in the ranking with Highest absolute variations in value. The A10S GLP-1 agonists Class dropped to third position in the raking, with a variation of +0.7 M€ (35.1%) while Ozempic® observes a growth of +0.72 M€ (69.8%) in relation to October 2020. On the other hand, the A10P SGLT2 inhibitors class continues to hold fifth position in the rankings with a performance of +0.6 M€ (39.3%) with Forxiga® performing with a positive variation of +0.28 M€ (60.8%).

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.

In the Top 5 of brands with the Highest absolute variation in units, Fortisip® leads with a variation of +42.5 M units (8.1%).

Pharma Market | Generic

Highest Absolute Variations in Value | November 2021

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	14	Amoxicillin	0.21	149.6%
2	1	Atorvastatin	0.13	10.6%
3	2	Rosuvastatin	0.13	13.0%
4	33	Posaconazole	0.11	287.9%
5	9	Sertraline	0.09	28.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	9	Pinamox	0.14	162.8%
2	5	Atorvastatin Accord	0.14	100.0%
3	6	Escitalopram Teva	0.10	50.9%
4	2	Rosuvastatin Teva Pharma	0.10	21.0%
5	18	Rosuva	0.10	102.9%

Highest Absolute Variations in Units | November 2021

INN's

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	17	Amoxicillin	33.5	229.7%
2	1	Atorvastatin	31.1	10.5%
3	9	Sertraline	22.7	29.2%
4	3	Rosuvastatin	20.2	12.3%
5	13	Omeprazole	19.2	33.0%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	5	Atorvastatin Accord	31.1	65.0%
2	8	Escitalopram Teva	22.6	100.0%
3	25	Pinamox	22.6	244.8%
4	7	Omeprazole Teva	20.8	44.4%
5	23	Rosuva	17.6	113.5%

Within the top 5 INNs entities with the highest absolute variation in value are Amoxicillin and Atorvastatin with a growth of +0.21 M€ and +0.13 M€ respectively, in comparison to last year's homologous period.

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

Pinamox® leads the Brand ranking recording the highest variation in value of +0.14 M€ (162.83%) while Atorvastatin Accord leads in terms of highest variations in units with an uplift of +31.1 Thousand Units (65%).

Published on 10th December 2021

Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | November 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	4.58	30.4%
2	5	Amgen	2.40	29.4%
3	2	Janssen	2.40	21.3%
4	3	Novartis	1.83	17.4%
5	10	AstraZeneca	1.25	30.9%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	Novo Nordisk	0.90	23.2%
2	1	GSK	0.68	10.8%
3	7	Bristol Myers Squibb	0.59	17.8%
4	10	AstraZeneca	0.54	21.1%
5	33	DexCom	0.52	99.0%

Highest Absolute Variations in Value | November 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	4.58	30.4%
2	2	Janssen	2.36	23.5%
3	4	Amgen	2.23	36.4%
4	3	Novartis	1.60	19.2%
5	13	AstraZeneca	0.71	48.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Teva	0.49	12.4%
2	5	KRKA	0.42	33.8%
3	6	Pinewood	0.33	26.4%
4	3	Clonmel	0.31	15.0%
5	4	Rowa	0.23	13.8%

HMR health market research

In both total Pharma Market and High Tech Market, Vertex continues to rank first in value, consolidating its position with a growth of +4.58 M€ (30.4%).

Amgen also continues to experience a significant value growth of +2.40 M€ (29.4%) in the total Pharma Market and of +2.23 M€ (36.4%) in the High Tech Market. Janssen continues to hold third position in the total Pharma Market with a value growth of +2.40 M€ (21.3%) while in the High Tech Market performs with an observed growth of +2.36 M€ (23.5%).

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, Novo Nordisk continues to lead with the highest absolute variation in value at +0.90 M€ (23.2%) in relation to the homologous period of 2020. In this market, GSK now holds second position in the rankings while Bristol Myers Squibb, AstraZeneca and Dexcom hold third, fourth and fifth positions respectively.

Among the Generic Market the top five companies with highest absolute variations in value maintain the same leaders as October 2021 with Teva, Krka, Pinewood, Clonmel and Rowa leading the rankings.

Top 5 Companies | By Sell-Out Units

health market research

Highest Absolute Variations in Units | November 2021

Pharma Market

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	124.3	14.8%
2	1	Teva	113.6	12.5%
3	11	KRKA	73.4	23.9%
4	7	GSK	69.3	16.6%
5	12	Pinewood	53.8	26.9%

Pharma Market | Excluding High Tech

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	124.3	14.8%
2	1	Teva	113.5	12.6%
3	11	KRKA	73.4	23.9%
4	7	GSK	69.3	16.6%
5	12	Pinewood	53.8	26.9%

Highest Absolute Variations in Units | November 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	3.44	26.5%
2	2	Merck	1.52	12.6%
3	4	Novartis	1.33	18.8%
4	9	Janssen	1.26	41.6%
5	10	Accord	0.81	35.8%

Pharma Market | Generic

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	1	Teva	85.5	12.2%
2	3	Clonmel	64.3	16.9%
3	5	KRKA	60.8	29.0%
4	6	Pinewood	55.7	29.2%
5	4	Rowa	38.6	12.0%

In the total Pharma Market, Clonmel continues to steadily rank in first position with the highest variation in units, performing with a growth of +124.3 Thousand units (14.8%). Teva is now performing in second position with a significant growth in relation to the homologous period of 2020 achieving +113.6 Thousand units (12.5%).

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. Amgen consolidates its position as leader within this market with an absolute variation of +3.44 Thousand units (26.5%) followed by Merck with an absolute variation of +1.52 Thousand units (12.6%). Also worth noting is that Accord now holds a position in the High Tech Market ranking, demonstrating a growth of +0.81 Thousand units (35.8%).

In the Generic Market the top five companies with highest absolute variations in units include Teva, Clonmel, KRKA, Pinewood 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).

HMR health market research

Knowledge for better health