Market Watch Ireland

December 2021

Filipe Infante
Country Manager

Knowledge for better health

We believe in the power of Knowledge.

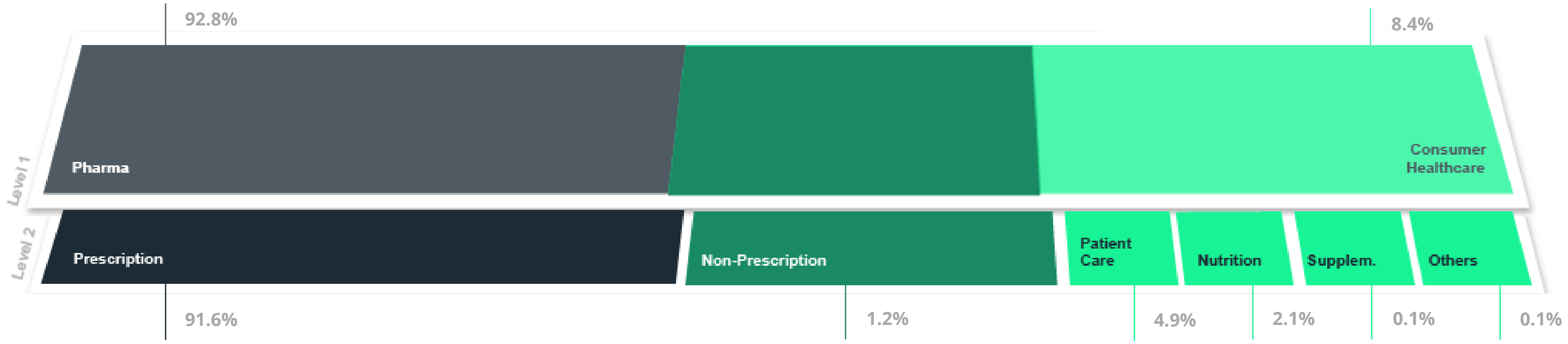
A deep knowledge of the market is the first step to deliver unique market insights. It’s that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyze the market.

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

Total Market

Dynamics of the Pharmacy Channel

December 2021
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	December 2021						MAT December 2021					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	216.8 €	100.0%	9.6%	11.4	100.0%	4.4%	2,412.7 €	100.0%	11.1%	129.9	100.0%	5.6%
Pharma Market	201.3 €	92.8%	10.3%	9.2	80.7%	6.1%	2233.7	92.6%	11.8%	103.2	79.4%	6.0%
Consumer Healthcare	18.2 €	8.4%	0.6%	2.6	23.0%	-2.0%	210.6	8.7%	3.2%	31.7	24.4%	3.8%
Prescription Medicines	198.6 €	91.6%	10.5%	8.8	77.0%	6.5%	2,202.1 €	91.3%	11.9%	98.2	75.6%	6.2%
Branded	179.9 €	83.0%	10.7%	5.5	48.5%	6.0%	1,994.8 €	82.7%	12.1%	62.2	47.9%	4.4%
Generic	18.7 €	8.6%	8.4%	3.2	28.5%	7.3%	207.4 €	8.6%	10.0%	36.0	27.7%	9.4%
Non Prescription (OTC)	2.7 €	1.2%	0.4%	0.4	3.7%	-1.8%	31.6 €	1.3%	3.7%	5.0	3.8%	1.9%
Branded	2.4 €	1.1%	-0.2%	0.4	3.3%	-2.1%	29.0 €	1.2%	1.5%	4.4	3.4%	-0.9%
Generic	0.2 €	0.1%	6.7%	0.05	0.4%	1.4%	2.6 €	0.1%	36.4%	0.5	0.4%	33.6%
Nutrition	4.5 €	2.1%	-0.9%	1.6	14.4%	-1.0%	54.7 €	2.3%	3.7%	20.1	15.5%	5.6%
Patient Care	10.5 €	4.9%	1.8%	0.5	4.6%	-4.6%	118.2 €	4.9%	3.1%	6.2	4.8%	-0.1%
Supplements	0.2 €	0.1%	0.2%	0.02	0.2%	-1.8%	2.8 €	0.1%	1.7%	0.2	0.2%	1.0%
Others	0.3 €	0.1%	-11.0%	0.01	0.1%	-12.1%	3.2 €	0.1%	-1.9%	0.2	0.1%	-5.9%

The dispensary retail market in December 2021 increased by +9.6% in value and +4.4% in units, when compared to the same period of the previous year.

The Pharma Market continues to represent 92.8% of the total dispensary retail market with Prescription and Non-prescription medicines at 91.6% and 1.2% respectively.

The moving annual total (MAT) analysis, that in December represents the whole year of 2021, shows that the Pharma Market had a growth of +11.8% in value and +6.0% in units while the Consumer Market had a growth of +3.2% in value and +3.8% in units.

Branded POM consolidated its position as the main driver of the Pharma Market with MAT value growth at +12.1%. Generic POM sees an increase of +10.0% while both OTCs Branded and Generics show a total increase of +3.7%.

In units, POM sees a MAT increase of +4.4% for Branded and +9.4% for Generic medicines. OTCs Branded sees a decrease of -0.9% and OTC Generics an increase of +33.6% in units.

The Consumer Market represents 8.4% of the total dispensary market, with Non-prescription medicines contributing 1.2% and Patient care and Nutrition segments 4.9% and 2.1% respectively.

The growth in the Consumer Market continues to be steadily driven by the Nutrition segment, now performing with a MAT growth of +3.7% in value and +5.6% in units.

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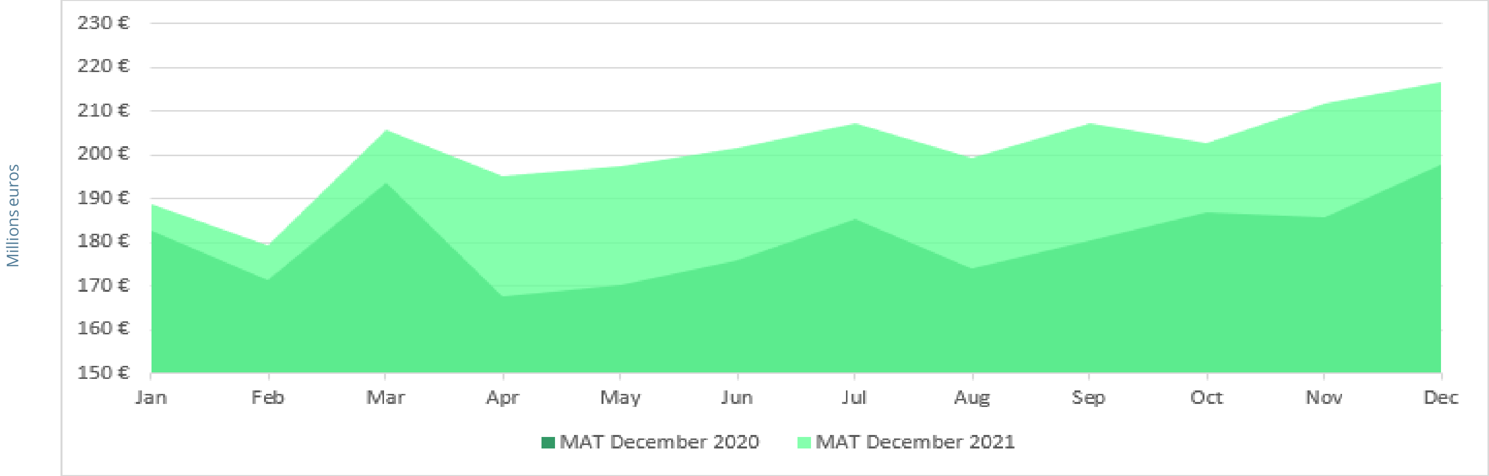
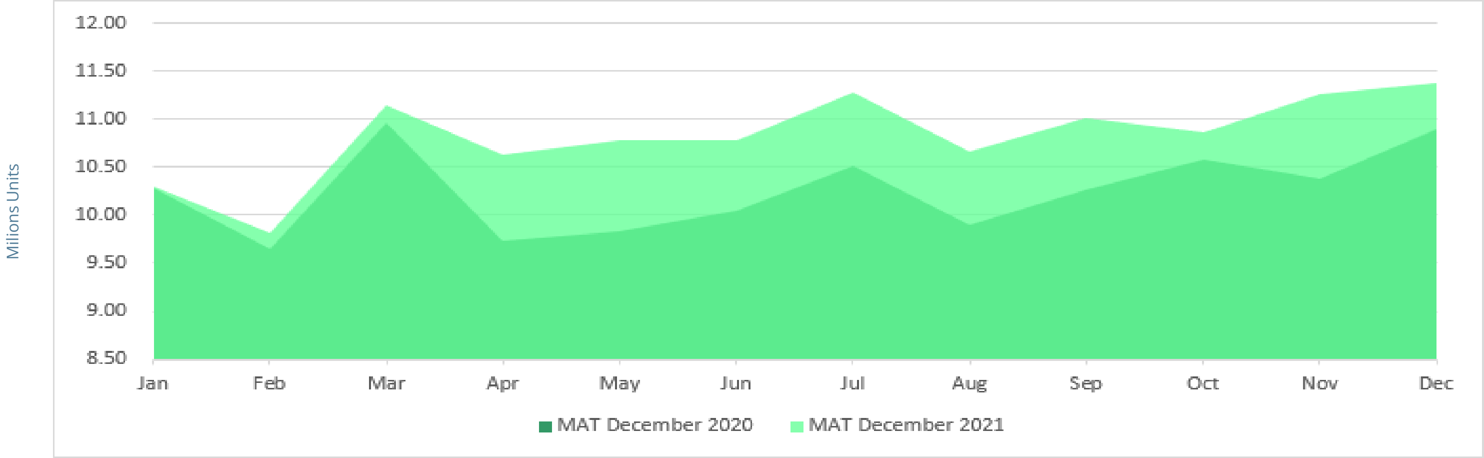
Total Market

Monthly Evolution in Value
December 2020 – December 2021



Monthly Evolution in Units
December 2020 – December 2021



Compared to December 2020, the Total Market continues to register a more pronounced variation in value than in units (+9.6% and +4.4% respectively).

In December 2021, a positive evolution in terms of value and units sold is observed when compared to the month of November 21.

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.

Pharma Market

Highest Absolute Variations in Value | December 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	3.5	21.2%
2	1	L04B - Anti-TNF products	2.5	14.5%
3	5	L04C - Interleukin inhibitors	2.0	30.8%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.4	13.1%
5	6	L01X - All other antineoplastics	1.1	16.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.8	78.7%
2	3	Amgevita	2.4	100.0%
3	1	Kalydeco	2.3	26.5%
4	4	Stelara	1.2	28.3%
5	17	Ozempic	0.7	60.5%

Highest Absolute Variations in Units | December 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	53.1	65.8%
2	4	N06A - Anti-depressants and mood stabilisers	44.3	8.0%
3	2	C10A - Cholesterol and triglyceride regulating preparations	35.6	5.7%
4	3	A02B - Antiulcerants	24.8	4.3%
5	49	G03C - Oestrogens excluding G3A G3E G3F	23.5	104.8%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	16	Atorvastatin Accord	31.9	65.2%
2	76	Astilin	25.7	100.0%
3	1	Fortisip	22.8	4.3%
4	55	Rosuva	22.5	144.9%
5	21	Stilnoct	18.7	39.2%

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 +3.5 M€ (+21.2%) in relation to the homologous period of 2020. Both Kalydeco® and Kaftrio® also continue to rank in the top of the brand rankings, Kaftrio® with +2.8 M€ (+78.7%) and Kaydeco® with +2.3 M€ (+26.5%).

The Anti-TNF products L04B class ranks continues in second position with a positive variation of +2.5 M€ (+14.5%), with the Amgen Biosimilar medicine Amgevita® stepping up one position to rank second in the top brands with a growth of +2.4 M€ (+100.0%).

The Interleukin inhibitors L04C class keeps third position with a positive variation of +2.0 M€ (+30.8%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +1.2 M€ (+28.3%) in relation to the homologous period of 2020.

The GPL1 drug Ozempic® achieves the top 5 brands with highest absolute variation in value, with an observed growth of +0.7 M€ (60.5%) in relation to December 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 +53.1 Thousand units (65.8%) followed by the N06A Anti-depressants and mood stabilisers class with an absolute growth of +44.3 Thousand units (8.0%).

The Class C10A Cholesterol and triglyceride regulation preparations also keeps third position in the top ATC ranking with an absolute variation of +35.6 Thousand units (+5.7%). Within this market, Atorvastatin Accord reached now the first position in the brand ranking with an observed growth of 31.9 Thousand units (65.2%) in comparison to last year's homologous period.

In the Top 5 of brands with the second highest absolute variation in units is now Astilin from the anti-depressants and mood stabilisers therapeutic class, with a variation of +25.7 M units (100.0%).

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Pharma Market | High-Tech

health market research

Highest Absolute Variations in Value | December 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	2	R07B - Cystic fibrosis products	3.5	21.2%
2	1	L04B - Anti-TNF products	2.6	14.5%
3	4	L04C - Interleukin inhibitors	2.0	30.8%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.4	13.2%
5	5	L01X - All other antineoplastics	1.1	16.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.8	78.7%
2	3	Amgevita	2.4	100.0%
3	1	Kalydeco	2.3	26.5%
4	4	Stelara	1.2	28.3%
5	7	Imbruvica	0.5	17.9%

Highest Absolute Variations in Units | December 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	3.7	18.0%
2	7	L04C - Interleukin inhibitors	1.0	31.4%
3	2	L04X - Other immunosuppressants	1.0	5.5%
4	25	N02C - Anti-migraine preparations	0.7	-
5	3	G03G - Gonadotrophins including other ovulation stimulants	0.6	12.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	3.4	73.6%
2	38	Veletri	0.5	100.0%
3	57	Ajovy	0.4	-
4	18	Hulio	0.4	36.8%
5	5	Benepali	0.4	13.9%

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 and November 2021. The top 4 products in the Brand ranking are the same as in last month but changed their positions while Imbruvica replaced Revlimid with a 17.9% variation.

In terms of Highest Absolute Unit Variation the Anti-TNF L04B class maintains first position in the market with a growth of +3.7 Thousand Units (18.0%). Within this market, the Biosimilars Amgevita®, Hulio® and Benepali® rank in the top 5 brands.

Worth highlighting is the performance observed of the L04X Class, that now holds third position in the ranking with a growth of +1.0 Thousand units (+5.5%).

The N02C class, Anti-migraine preparations, in forth position is new to the ranking with an uplift of +0.7 Thousand units in relation to the homologous period of 2020.

The L04C Class maintains a position in the ranking with a variation of +1.0 Thousand units (31.4%) but none of the three brands of this class, Cosentyx®, Stelara® and Dupixent®, reaches the top 5 individually.

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Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | December 2021

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	13	T03A - Diagnostic equipment and accessories	0.8	58.8%
2	9	A10S - GLP-1 agonist antidiabetics	0.7	28.8%
3	2	B01F - Direct factor Xa inhibitors	0.7	10.6%
4	14	A10P - SGLT2 inhibitor antidiabetics	0.5	32.5%
5	40	J01C - Broad spectrum penicillins	0.3	60.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	3	Ozempic	0.69	60.5%
2	8	Dexcom	0.55	100.0%
3	1	Eliquis	0.53	14.6%
4	16	Forxiga	0.28	54.3%
5	7	Medtronic	0.24	24.9%

Highest Absolute Variations in Units | December 2021

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	53.1	65.8%
2	4	N06A - Anti-depressants and mood stabilisers	44.3	8.0%
3	2	C10A - Cholesterol and triglyceride regulating preparations	35.5	5.7%
4	3	A02B - Antiulcerants	24.8	4.3%
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Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	16	Atorvastatin Accord	31.9	65.2%
2	76	Astilin	25.7	100.0%
3	1	Fortisip	22.8	4.3%
4	55	Rosuva	22.5	144.9%
5	21	Stilnoct	18.7	39.2%

When analysing the Pharma Market, excluding the medicines reimbursed under the High Tech Scheme arrangements, the T03A Diagnostic equipment and accessories stepped from second to leading position of top ATC Classes with the highest absolute variation in value, of +0.8 M€ (+58.8%). Within this market, Dexcom® and Medtronic® keep growing in the rank of the Top Brands with a variation of +0.55 M€ (100.0%) and of +0.24 M€ (24.9%), respectively.

The Direct factor Xa inhibitors B01F class drops from first to third position with a variation in value of +0.7 M€ (+10.6%). Within this market, both Eliquis® continues to lead the growth with a variation of +0.53 M€ (14.6%).

The antidiabetic classes, A10S and A10P maintain a position in the ranking with Highest absolute variations in value. The A10S GLP-1 agonists Class grew to secont position in the raking, with a variation of +0.7 M€ (28.8%) while Ozempic® observes a growth of +0.69 M€ (60.5%) in relation to November 2020. Similarly, the A10P SGLT2 inhibitors class also stepped up one position to fourth in the rankings with a performance of +0.5 M€ (32.5%) with Forxiga® performing with a positive variation of +0.28 M€ (54.3%).

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, Atorvastatin Accord® leads with a variation of +31.9 M units (65.2%).

Pharma Market | Generic

Highest Absolute Variations in Value | December 2021

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	15	Amoxicillin	0.14	79.5%
2	31	Posaconazole	0.13	222.3%
3	2	Rosuvastatin	0.10	8.9%
4	1	Atorvastatin	0.09	6.8%
5	36	Dutasteride + Tamsulosin	0.09	165.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.14	75.2%
2	9	Rosuva	0.13	100.0%
3	12	Pinamox	0.11	101.8%
4	28	Ezetimibe Krka	0.10	201.0%
5	29	Posaconazole Accord	0.09	174.1%

Highest Absolute Variations in Units | December 2021

INN's

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	1	Atorvastatin	23.3	7.4%
2	23	Amoxicillin	19.6	103.1%
3	8	Sertraline	19.4	22.4%
4	3	Rosuvastatin	14.5	8.1%
5	13	Omeprazole	13.9	21.3%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	5	Atorvastatin Accord	31.9	65.2%
2	20	Rosuva	22.5	100.0%
3	7	Escitalopram Teva	18.0	35.0%
4	28	Pinamox	17.5	149.9%
5	13	Lercanidipine Clonmel	15.1	41.9%

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Within the top 5 INNs entities with the highest absolute variation in value Amoxicillin keeps the lead with a growth of +0.14 M€, in comparison to last year's homologous period.

In relative terms, Amoxicillin, Atorvastatin and Rosuvastatin continued to perform with marked positive variations, both in value and units. Differently Sertraline kept a top 5 position in the units top 5 but lost it in the Value top 5 highest absolute variations ranking.

Pinamox® lost the leadership to Atorvastin Teva that now leads the Brand ranking recording the highest variation in value of +0.14 M€ (75.2%).

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Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | December 2021

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	3.50	21.2%
2	2	Janssen	2.77	23.1%
3	5	Amgen	2.31	27.1%
4	3	Novartis	1.31	11.4%
5	12	AstraZeneca	0.77	17.1%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.75	17.4%
2	31	DexCom	0.55	92.1%
3	7	Bristol Myers Squibb	0.52	14.9%
4	6	Clonmel	0.46	12.1%
5	10	AstraZeneca	0.41	15.1%

Highest Absolute Variations in Value | December 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	3.50	21.2%
2	2	Janssen	2.74	25.7%
3	4	Amgen	2.37	35.5%
4	3	Novartis	1.12	12.3%
5	10	Astellas	0.49	22.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	5	KRKA	0.37	27.1%
2	6	Pinewood	0.34	26.0%
3	3	Clonmel	0.33	15.3%
4	4	Rowa	0.20	11.7%
5	1	Teva	0.19	4.3%

The Pharma Market and High Tech Market, share the same top 4 players with Vertex, Janssen, Amgen and Novartis consolidating its positions with the only difference on the fifth position that is occupied by AstraZeneca on the Pharma market and by Astellas on the High Tech market.

Amgen also continues to experience a significant value growth of +2.31 M€ (27.1%) in the total Pharma Market and of +2.37 M€ (35.5%) in the High Tech Market. Janssen continues to hold third position in the total Pharma Market with a value growth of +2.77 M€ (23.1%) while in the High Tech Market performs with an observed growth of +2.74 M€ (25.7%).

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 +0.75 M€ (17.4%) in relation to the homologous period of 2020. In this market, AstraZeneca now holds fifth position in the rankings.

Among the Generic Market Krka assumed the leading position while the previous leader, Teva, dropped to the fifth position.

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | December 2021

Pharma Market

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	123.2	14.3%
2	10	KRKA	56.0	16.5%
3	12	Pinewood	50.9	24.7%
4	35	Azure	41.9	224.1%
5	1	Teva	40.0	3.9%

Pharma Market | Excluding High Tech

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	123.1	14.3%
2	10	KRKA	56.0	16.5%
3	12	Pinewood	50.9	24.7%
4	34	Azure	41.9	224.1%
5	1	Teva	39.8	3.9%

Highest Absolute Variations in Units | December 2021

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	3.49	25.1%
2	9	Janssen	1.33	41.6%
3	10	Accord	1.02	45.4%
4	3	Novartis	0.81	10.2%
5	4	Merck	0.46	5.6%

Pharma Market | Generic

rank var abs	rank valor	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	69.0	17.7%
2	6	Pinewood	53.3	27.2%
3	5	KRKA	53.2	23.3%
4	1	Teva	24.6	3.1%
5	4	Rowa	23.6	6.8%

In the total Pharma Market, Clonmel continues to rank in first position with the highest variation in units, performing with a growth of +123.2 Thousand units (14.3%). Krka is now performing in second position with a significant growth in relation to the homologous period of 2020 achieving +56.0 Thousand units (14.3%).

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

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 +3.49 Thousand units (25.1%) followed by Janssen with an absolute variation of +1.33 Thousand units (41.6%). Also worth noting is that Accord continued to hold the third position in the High Tech Market ranking, demonstrating a growth of +1.02 Thousand units (45.4%).

In the Generic Market the top five companies with highest absolute variations in units include the same companies as the ones in the similar value ranking.

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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).

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