Market Watch Ireland

January 2022

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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.

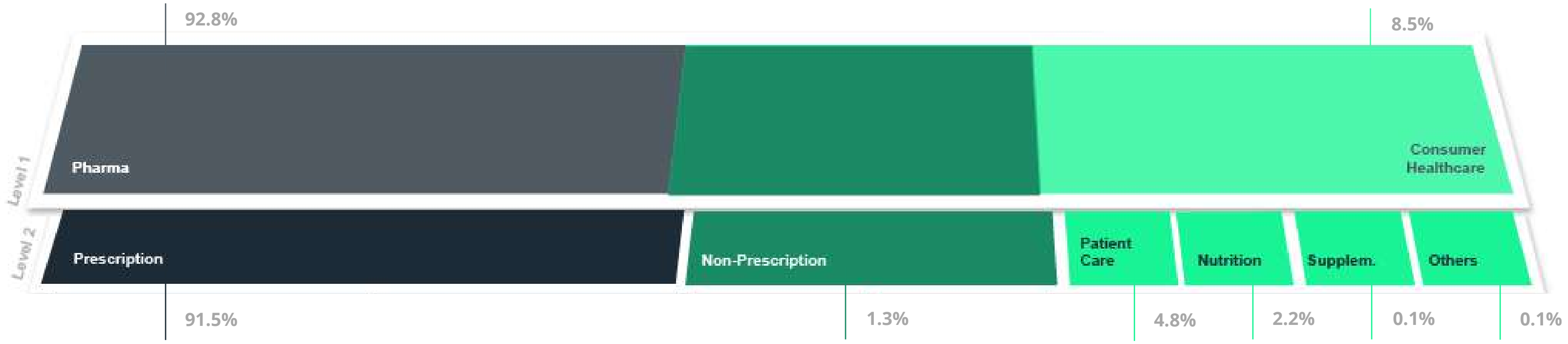
Because we believe that the power of knowledge grows when it is shared. And can change lives.

HMR health market research

Total Market

Dynamics of the Pharmacy Channel

January 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	January 2022						MAT January 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	205.7 €	100.0%	9.1%	10.8	100.0%	4.7%	2,429.8 €	100.0%	11.6%	130.4	100.0%	6.0%
Pharma Market	190.9 €	92.8%	9.6%	8.6	79.9%	5.6%	2250.4	92.6%	12.3%	103.6	79.5%	6.5%
Consumer Healthcare	17.5 €	8.5%	2.9%	2.6	23.9%	0.9%	211.1	8.7%	3.4%	31.7	24.3%	3.7%
Prescription Medicines	188.3 €	91.5%	9.7%	8.2	76.1%	5.9%	2,218.8 €	91.3%	12.4%	98.7	75.7%	6.7%
Branded	170.8 €	83.0%	10.0%	5.2	48.1%	5.8%	2,010.2 €	82.7%	12.7%	62.5	47.9%	5.3%
Generic	17.4 €	8.5%	7.0%	3.0	28.0%	6.1%	208.5 €	8.6%	10.3%	36.1	27.7%	9.4%
Non Prescription (OTC)	2.6 €	1.3%	2.2%	0.4	3.7%	-1.0%	31.7 €	1.3%	4.2%	5.0	3.8%	2.2%
Branded	2.4 €	1.2%	1.9%	0.4	3.3%	-1.1%	29.1 €	1.2%	2.3%	4.4	3.4%	-0.3%
Generic	0.2 €	0.1%	5.3%	0.04	0.4%	0.3%	2.6 €	0.1%	32.7%	0.5	0.4%	29.0%
Nutrition	4.4 €	2.2%	1.6%	1.6	15.2%	1.7%	54.8 €	2.3%	3.8%	20.1	15.4%	5.3%
Patient Care	9.9 €	4.8%	4.4%	0.5	4.7%	0.1%	118.6 €	4.9%	3.3%	6.2	4.8%	0.2%
Supplements	0.2 €	0.1%	0.7%	0.02	0.2%	-1.6%	2.8 €	0.1%	2.0%	0.2	0.2%	0.9%
Others	0.3 €	0.1%	-19.2%	0.01	0.1%	-9.7%	3.2 €	0.1%	-5.5%	0.2	0.1%	-6.7%

The dispensary retail market in January 2022 increased by +9.1% in value and +4.7% 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 representing 91.5% and 1.3% respectively. Values that are aligned with last December's.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +12.3% in value and +6.5% in units while the Consumer Market is growing +3.4% in value and +3.7% in units.

Branded POM consolidates it's position in January as the main driver for the Pharma Market with MAT value growth at +10.0%. Generic POM sees an increase of +7.0% while both OTCs Branded and Generics demonstrate a total value increase of +2.2%.

In units, POM sees a MAT increase of +5.3% for Branded and +9.4% for Generic medicines. OTCs Branded sees a decrease of -0.3% and OTC Generics an increase of +29.0% 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 4.8% and 2.2% respectively.

The growth in the Consumer Market continues to be driven by the Nutrition segment with a MAT growth of +3.8% in value and +5.3% in units.

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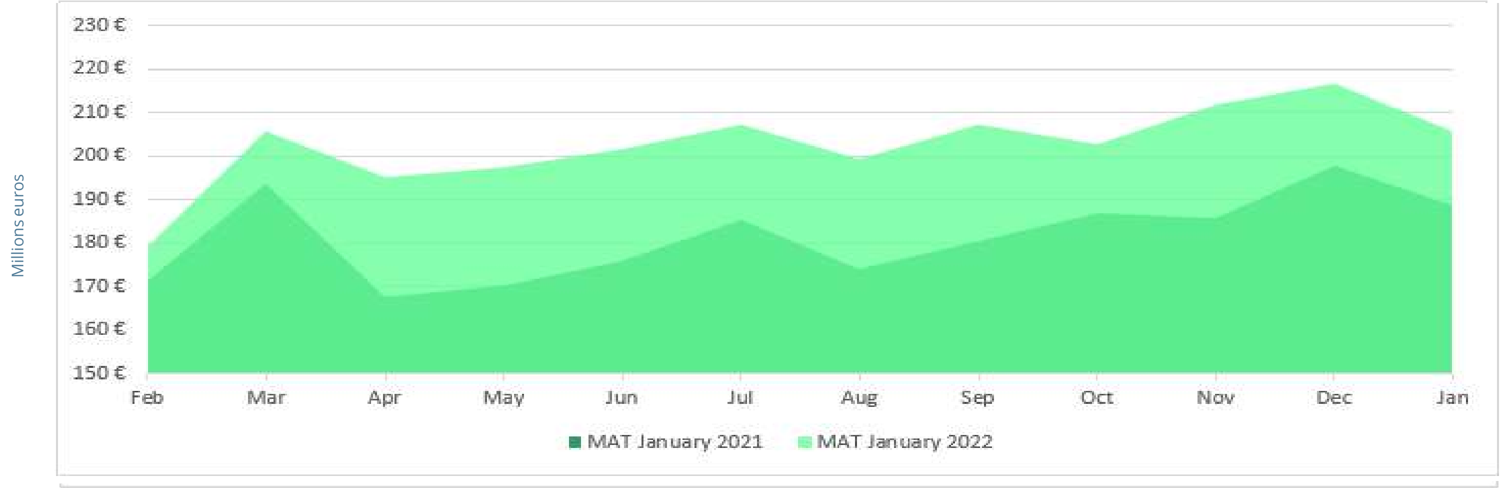
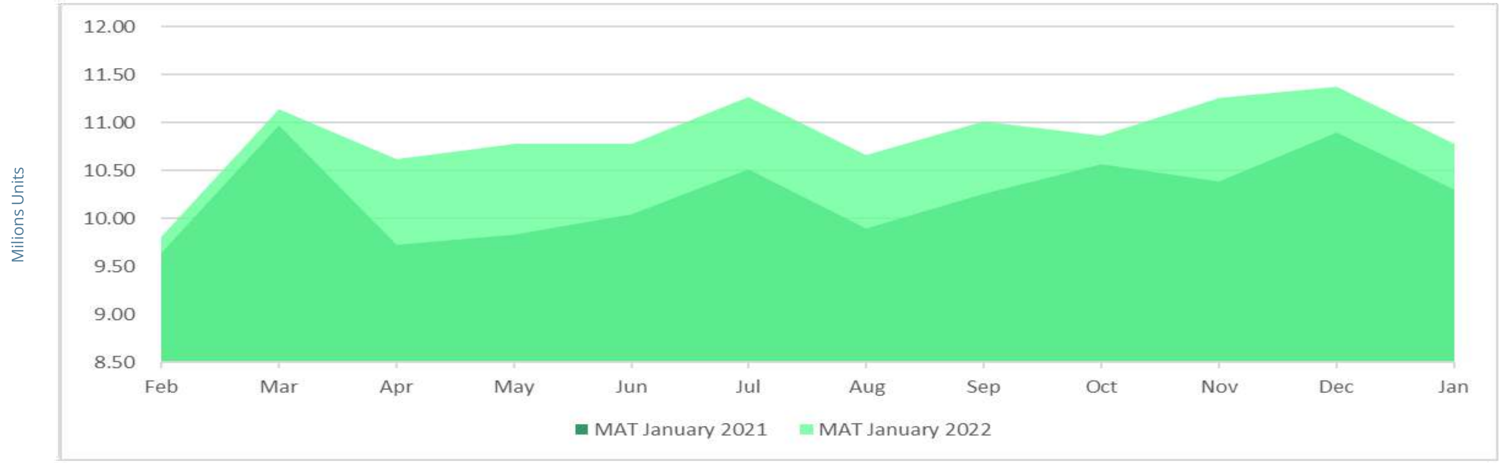
Total Market

Monthly Evolution in Value
January 2021 – January 2022



Monthly Evolution in Units
January 2021 – January 2022



Compared to January 2021, the Total Market continues to register a more pronounced variation in value than in units, +9.1% and +4.7% respectively.

In January 2022, a decline in terms of value and units sold is observed when compared to the month of December 2021, -5.1% and -5.3% respectively.

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

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Pharma Market

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Highest Absolute Variations in Value | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.2	12.4%
2	5	L04C - Interleukin inhibitors	2.1	35.2%
3	2	L04B - Anti-TNF products	1.5	8.8%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.2	12.3%
5	22	T03A - Diagnostic equipment and accessories	0.7	56.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.2	53.7%
2	4	Amgevita	1.8	100.0%
3	1	Kalydeco	1.3	13.8%
4	3	Stelara	1.2	31.5%
5	17	Ozempic	0.7	66.5%

Highest Absolute Variations in Units | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	3	N06A - Anti-depressants and mood stabilisers	37.9	7.2%
2	1	C10A - Cholesterol and triglyceride regulating preparations	30.3	5.2%
3	45	G03C - Oestrogens excluding G3A G3E G3F	27.7	126.1%
4	27	J01C - Broad spectrum penicillins	26.3	39.9%
5	2	A02B - Antiulcerants	24.3	4.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	49.9	9.7%
2	15	Atorvastatin Accord	30.2	100.0%
3	66	Astilin	22.2	291.1%
4	57	Rosuva	20.1	139.1%
5	9	Paralief	18.7	23.9%

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 +2.2 M€ (+12.4%) in relation to the homologous period of 2021. Both Kaftrio® and Kalydeco® continue to rank first and third place respectively in brand values variation ranking, with +2.2 M€ (+53.7%) for Kaftrio® and +1.3 M€ (+113.8%) for Kalydeco®. On the same ATC class Orkambi® had the highest decrease with -1.2 M€.

The Interleukin inhibitors L04C class now ranks in second place, having changed position with the Anti-TNF products, with a positive variation of +2.1 M€ (+35.2%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +1.2 M€ (+31.5%) in relation to the homologous period of 2021.

This month the Anti-TNF products L04B class ranks in third position with a positive variation of +1.5 M€ (+8.8%), with the Biosimilar medicine Amgevita® ranking in the top 5 brands with a growth of +1.8 M€ (+100.0%).

Worth highlighting is the diabetes drug Ozempic® that now ranks in the top 5 brands with a growth of +0.7 M€ (66.5%) in relation to January 2021.

In terms of highest absolute variations in units, the ranking won a new leader with Anti-depressants and mood stabilisers class N06A growing by +37.9 Thousand units (+7.2%). While the leader in last December, the antibiotics from the J01C - Broad spectrum penicillins class stepped to 4th position with a growth of +26.3 Thousand units (+39.9%). In the Top 5 of brands with the third highest absolute variation in units is Astilin from the anti-depressants and mood stabilisers therapeutic class, with a variation of +22.2 M units (+291.1%)

The Class C10A Cholesterol and triglyceride regulation preparations also keeps a position in the top ATC ranking with an absolute variation of +30.3 Thousand units (+5.2%). Within this market, Atorvastatin Accord is now on the second position in the brand ranking with an observed growth of +30.2 Thousand units (+100.0%) in comparison to last year's homologous period.

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Pharma Market | High-Tech

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Highest Absolute Variations in Value | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.2	12.4%
2	4	L04C - Interleukin inhibitors	2.1	35.2%
3	2	L04B - Anti-TNF products	1.5	8.8%
4	3	L01H - Protein kinase inhibitor antineoplastics	1.2	12.4%
5	7	L02B - Cytostatic hormone antagonists	0.6	16.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.2	53.7%
2	4	Amgevita	1.8	100.0%
3	1	Kalydeco	1.3	13.8%
4	3	Stelara	1.2	31.5%
5	8	Cosentyx	0.5	24.1%

Highest Absolute Variations in Units | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	2.3	11.8%
2	6	L04C - Interleukin inhibitors	1.1	37.0%
3	2	L04X - Other immunosuppressants	0.5	3.4%
4	29	N02C - Anti-migraine preparations	0.5	-
5	15	C06B - Pulmonary arterial hypertension (PAH) products	0.4	26.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.5	53.6%
2	38	Veletri	0.6	100.0%
3	10	Cosentyx	0.5	25.9%
4	45	Pergoveris	0.4	200.4%
5	18	Stelara	0.4	31.4%

The High-Tech Market continues to leads the overall Pharma Market in terms of absolute value variation showing the same top 4 players.

The L04C - Interleukin inhibitors hold the second position with a growth of +2.1 M€ (+35.2%) keeping two brands in the top five rank: Stelara® and Cosentix®. The L01H - Protein kinase inhibitor antineoplastics kept a place in the rank with the contribution of Ibrance® good performance.

The top 4 products in the Brand ranking are the same as in last month but changed their positions while Cosentix® replaced Imbruvica with a +0.5 M€ (+24.1%) variation.

In terms of Highest Absolute Unit Variation the Anti-TNF L04B class maintains first position in the market with a growth of +2.3 Thousand Units (+11.8%). Within this market, the Biosimilar Amgevita® continues to show the highest growth.

The N02C class, Anti-migraine preparations, kept the forth position achieved last month with an uplift of +0.5 Thousand units in relation to the homologous period of 2021. Zomig® and Imigran® continue to lead the class sales units but with Sumatriptan and Zolmitriptan from Accord leading the class units growth.

The L04C Class maintains the second position in the ranking with a variation of +1.1 Thousand units (+37.0%) with two of the three brands of this class, Cosentyx® and Stelara®, reaching the top 5 individually but with Dupixent® having the highest percentual growth of them, with (+100.0%).

Pharma Market | Excluding High Tech

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Highest Absolute Variations in Value | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	13	T03A - Diagnostic equipment and accessories	0.7	56.6%
2	8	A10S - GLP-1 agonist antidiabetics	0.7	32.9%
3	2	B01F - Direct factor Xa inhibitors	0.6	10.9%
4	14	A10P - SGLT2 inhibitor antidiabetics	0.5	33.2%
5	10	M05B - Bone calcium regulators	0.4	19.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.72	66.5%
2	1	Eliquis	0.53	100.0%
3	8	Dexcom	0.49	81.5%
4	2	Prolia	0.40	24.3%
5	15	Forxiga	0.28	56.7%

Highest Absolute Variations in Units | January 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	4	N06A - Anti-depressants and mood stabilisers	37.9	7.2%
2	2	C10A - Cholesterol and triglyceride regulating preparations	30.3	5.2%
3	46	G03C - Oestrogens excluding G3A G3E G3F	27.7	126.1%
4	28	J01C - Broad spectrum penicillins	26.3	39.9%
5	3	A02B - Antiulcerants	24.3	4.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	49.9	9.7%
2	15	Atorvastatin Accord	30.2	100.0%
3	66	Astilin	22.2	291.1%
4	57	Rosuva	20.1	139.1%
5	9	Paralief	18.7	23.9%

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 +0.7 M€ (+56.6%). Within this market, Dexcom® kept a position in the brands ranking but Medtronic® abandoned the top 5.

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +0.6 M€ (+10.9%). Within this class, Eliquis® is performing with a growth of +0.53 M€ (+100.0%) 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 +0.7 M€ (+32.9%) with Ozempic® observing a growth of +0.72 M€ (+66.5%) in relation to January 2021. The A10P SGLT2 inhibitors class ranks in fourth place with an increase of +0.5 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). Forxiga® keeps its place in the top 5 with a +0.28 M€ (+56.7%).

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 two rankings having the same leaders at both ATC Classes and Brand level.

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Pharma Market | Generic

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Highest Absolute Variations in Value | January 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	29	Posaconazole	0.13	251.7%
2	34	Dutasteride + Tamsulosin	0.09	174.8%
3	1	Atorvastatin	0.09	6.8%
4	22	Amoxicillin	0.07	45.2%
5	2	Rosuvastatin	0.07	6.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Atorvastatin Accord	0.13	76.4%
2	10	Rosuva	0.12	100.0%
3	24	Posaconazole Accord	0.11	308.2%
4	33	Ezetimibe Krka	0.08	198.6%
5	6	Escitalopram Teva	0.07	31.3%

Highest Absolute Variations in Units | January 2022

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	Atorvastatin	21.5	7.2%
2	7	Sertraline	17.0	20.2%
3	13	Omeprazole	13.2	21.7%
4	33	Amoxicillin	11.2	95.7%
5	3	Rosuvastatin	10.2	6.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	4	Atorvastatin Accord	30.2	66.4%
2	21	Rosuva	20.1	100.0%
3	7	Escitalopram Teva	15.8	31.4%
4	8	Omeprazole Teva	13.6	26.5%
5	13	Lercanidipine Clonmel	13.5	39.4%

Within the top 5 INNs entities with the highest absolute variation in value Amoxicillin dropped from first to fourth position in comparison to last month having a growth of +0.07 M€ in comparison to last year's homologous period. The January 2021 absolute variation leader is now the antifungal Posaconazole with +0.13 M€ (+251.7%)

In relative terms, Dutasteride + Tamsulosin grew from fourth position to second with a growth of +0.09 M€ (+174.8%), with Combodart® losing sales especially to Pinewood and Accord.

Atorvastatin Accord once again leads the Brand ranking recording the highest variations both in value of +0.13 M€ (+76.4%) and in units of +30.2 Thousand Units (+66.4%).

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Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | January 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	2	Janssen	2.50	22.1%
2	1	Vertex	2.15	12.4%
3	5	Amgen	2.04	24.9%
4	3	Novartis	1.36	12.5%
5	12	Novo Nordisk	0.77	18.5%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.77	19.5%
2	7	Bristol Myers Squibb	0.52	15.6%
3	30	DexCom	0.49	81.5%
4	18	Amgen	0.41	24.9%
5	6	Clonmel	0.37	10.3%

Highest Absolute Variations in Value | January 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	2	Janssen	2.46	24.4%
2	1	Vertex	2.15	12.4%
3	4	Amgen	1.62	24.9%
4	3	Novartis	1.15	13.2%
5	22	Sanofi	0.40	190.8%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	5	KRKA	0.31	24.1%
2	3	Clonmel	0.25	12.4%
3	6	Pinewood	0.23	18.4%
4	4	Rowa	0.23	13.9%
5	1	Teva	0.18	4.2%

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The Pharma Market and the 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 belongs now to Novo Nordisk on the Pharma market and by Sanofi on the High Tech market.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +0.77 M€ (+19.5%) growth when compared to January 2021, with Ozempic@ driving a significative growth.

Among the Generic Market Krka kept the leading growth position.

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | January 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	103.3	12.6%
2	10	KRKA	52.7	16.4%
3	2	Nutricia	39.4	4.4%
4	34	Azure	37.2	165.3%
5	12	Pinewood	31.5	16.2%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	103.2	12.6%
2	10	KRKA	52.7	16.4%
3	2	Nutricia	39.4	4.4%
4	32	Azure	37.2	165.3%
5	12	Pinewood	31.5	16.2%

Highest Absolute Variations in Units | January 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	2.87	22.0%
2	9	Janssen	1.32	44.3%
3	10	Accord	0.93	42.1%
4	4	Novartis	0.71	9.6%
5	20	PCO	0.46	55.7%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	53.7	14.3%
2	5	KRKA	52.1	24.3%
3	6	Pinewood	34.4	18.6%
4	4	Rowa	27.5	8.6%
5	1	Teva	26.0	3.5%

In the total Pharma Market, Clonmel continues to steadily rank in first position with the highest variation in units, performing with a growth of +103.3 Thousand units (+12.6%). KRKA is now performing in second place with a significant growth in relation to the homologous period of 2021 achieving +52.7 Thousand units (+16.4%).

In terms of unit variation for the Pharma Market excluding the medicines reimbursed under the High Tech Scheme arrangements, Clonmel and Krka kept first and second position when compared to December 2021.

In the High Tech Market Amgen kept the leadership with an absolute variation of +2.87 Thousand units (+22.0%) followed by Janssen with an absolute variation of +1.32 Thousand units (+44.3%).

Also worth noting is that PCO now holds a position in the High Tech Market ranking, demonstrating a growth of +0.46 Thousand units (+55.7%).

Among the Generic Market the top five companies with highest absolute variations in units are the same as in the last few months only with slight variations in its order.

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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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