Market Watch Ireland

February 2022

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Country Manager

Knowledge for better health

We believe in the power of Knowledge.

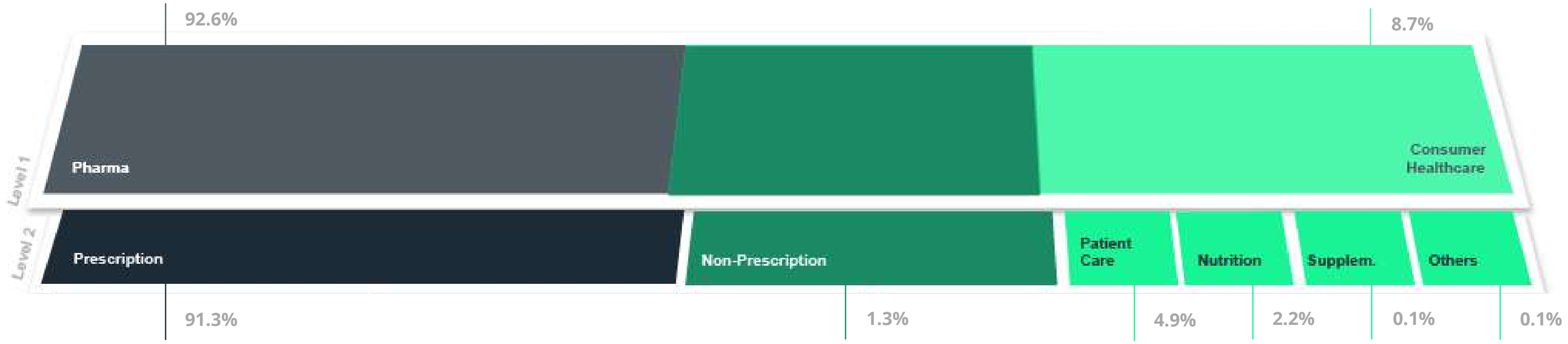
A deep knowledge of the market is the first step to deliver unique market insights. It's that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyze the market.

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

Total Market

Dynamics of the Pharmacy Channel

February 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	February 2022						MAT February 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	193.9 €	100.0%	8.2%	10.3	100.0%	5.0%	2,444.5 €	100.0%	11.9%	130.9	100.0%	6.2%
Pharma Market	179.6 €	92.6%	8.3%	8.2	79.9%	6.4%	2264.1	92.6%	12.5%	104.1	79.6%	7.0%
Consumer Healthcare	16.8 €	8.7%	6.4%	2.5	23.9%	-0.2%	212.1	8.7%	4.0%	31.7	24.2%	3.2%
Prescription Medicines	177.1 €	91.3%	8.3%	7.8	76.1%	6.8%	2,232.4 €	91.3%	12.7%	99.2	75.8%	7.2%
Branded	160.9 €	83.0%	8.8%	5.0	48.2%	6.9%	2,023.2 €	82.8%	12.9%	62.8	48.0%	6.0%
Generic	16.2 €	8.4%	4.2%	2.9	27.9%	6.5%	209.2 €	8.6%	10.1%	36.3	27.7%	9.3%
Non Prescription (OTC)	2.5 €	1.3%	3.0%	0.4	3.7%	0.0%	31.7 €	1.3%	4.5%	5.0	3.8%	2.3%
Branded	2.3 €	1.2%	2.6%	0.3	3.3%	-0.2%	29.1 €	1.2%	2.8%	4.4	3.4%	0.2%
Generic	0.2 €	0.1%	7.4%	0.04	0.4%	1.5%	2.6 €	0.1%	28.6%	0.5	0.4%	24.2%
Nutrition	4.2 €	2.2%	-0.6%	1.6	15.2%	0.5%	54.8 €	2.2%	3.4%	20.1	15.4%	4.6%
Patient Care	9.6 €	4.9%	10.8%	0.5	4.7%	-2.3%	119.6 €	4.9%	4.5%	6.2	4.8%	0.0%
Supplements	0.2 €	0.1%	-0.1%	0.02	0.2%	-1.2%	2.8 €	0.1%	2.2%	0.2	0.2%	1.1%
Others	0.3 €	0.1%	8.6%	0.01	0.1%	-0.6%	3.2 €	0.1%	-5.5%	0.2	0.1%	-6.0%

In February 2022 the dispensary retail market increased by +8.2% in value and +5.0% 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 91.3% and 1.3% respectively. Values that are aligned with last month.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +12.5% in value and +7.0% in units while the Consumer Market is growing +4.0% in value and +3.2% in units.

Branded POM consolidated its position in February as the main driver for the Pharma Market with MAT value growth at +12.9%. Generic POM sees an increase of +7.0% while both OTCs Branded and Generics demonstrate a total value increase of +4.5%.

In units, POM sees a MAT increase of +6.0% for Branded and +9.3% for Generic medicines. OTCs Branded sees a small increase of +0.2% and OTC Generics an increase of +24.2% in units.

In the February 2022 MAT the Prescription Generics show a market share of +27.7% in units and of 8.6% in value.

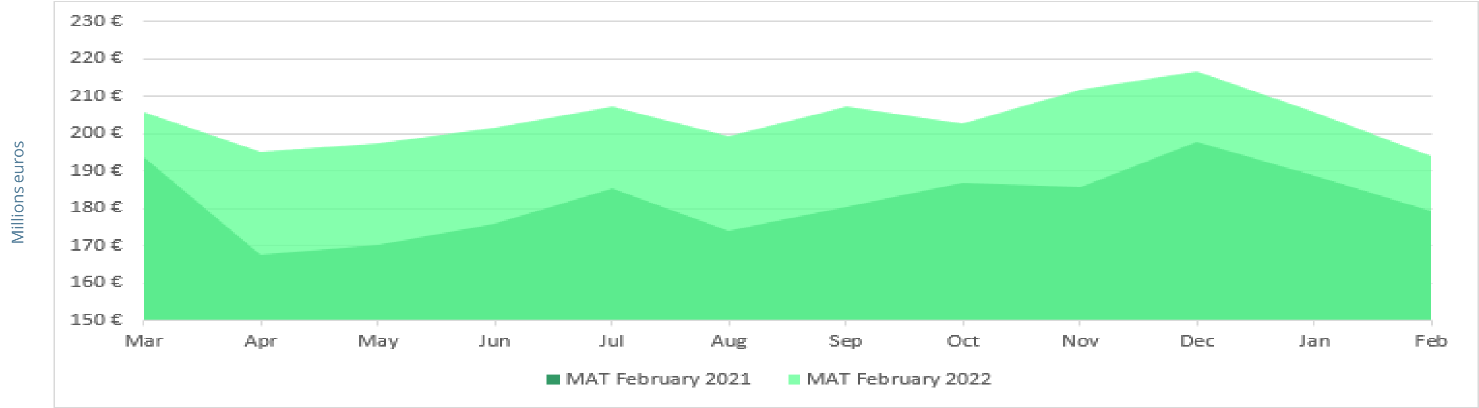
The Consumer Market currently represents 8.7% of the total dispensary market, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 4.9% and 2.2% respectively.

The growth in the Consumer Market continues to be driven by the Nutrition segment with a MAT growth of +3.4% in value and +4.6% in units.

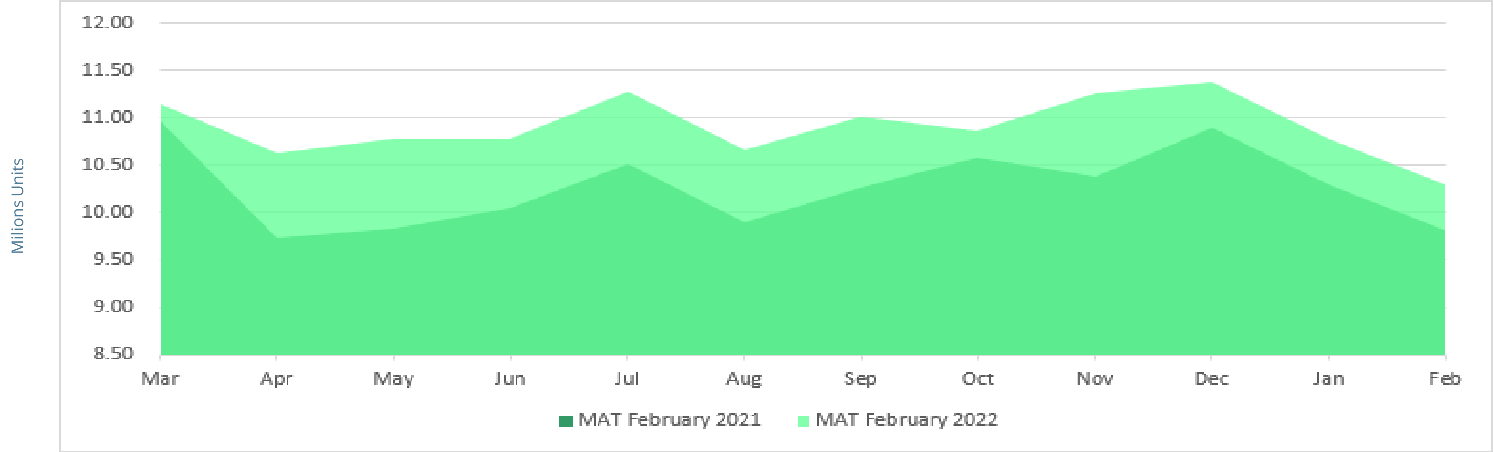
Published on 16th March 2022

Total Market

Monthly Evolution in Value
February 2021 – February 2022



Monthly Evolution in Units
February 2021 – February 2022



Compared to February 2021, the Total Market continues to register a more pronounced variation in value than in units.

In February 2022, a decline in terms of value and units dispensed is observed when compared to the month of January 2022.

Despite the decline in relation to January 2022, 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.

Pharma Market

health market research

Highest Absolute Variations in Value | February 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.5	16.0%
2	5	L04C - Interleukin inhibitors	1.7	28.3%
3	2	L04B - Anti-TNF products	1.5	9.2%
4	22	T03A - Diagnostic equipment and accessories	0.7	55.7%
5	16	A10S - GLP-1 agonist antidiabetics	0.7	33.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.0	51.3%
2	3	Amgevita	1.7	100.0%
3	1	Kalydeco	1.1	12.6%
4	4	Stelara	0.8	20.1%
5	17	Ozempic	0.7	66.0%

Highest Absolute Variations in Units | February 2022

ATC3

rank var abs	rank valor	ATC3	Var. Abs. Th Units	Var.
1	20	J01C - Broad spectrum penicillins	51.3	93.4%
2	3	N06A - Anti-depressants and mood stabilisers	31.9	6.3%
3	1	C10A - Cholesterol and triglyceride regulating preparations	30.2	5.4%
4	45	G03C - Oestrogens excluding G3A G3E G3F	26.3	121.1%
5	2	A02B - Antiulcerants	24.1	4.6%

Brands

rank var abs	rank valor	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	43.4	8.6%
2	15	Atorvastatin Accord	27.3	100.0%
3	62	Astilin	19.8	194.2%
4	9	Paralief	19.0	25.8%
5	97	Pinamox	15.5	280.2%

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 +2.5 M€ (+16.0%) 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 +2.0 M€ (+51.3%) for Kaftrio® and +1.1 M€ (+12.6%) for Kalydeco®. On the same ATC class Orkambi® had the highest market value decrease with -0.6 M€ (-23.8%).

The Interleukin inhibitors L04C class ranks in second place with a positive variation of +1.7 M€ (+28.3%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +0.8 M€ (+20.1%) in relation to the homologous period of 2021 and with a total market value ahead of the other two brands in this class, Cosentyx@ and Dupixent@.

This month also the Anti-TNF products L04B class kept their ranks position, with a positive variation of +1.5 M€ (+9.2%), with the Biosimilar medicine Amgevita® ranking in the top 5 brands with a growth of +1.7 M€ (+51.3%). In this class Idacio@, from Fresenius Kabi, is showing the highest percentual previous year value growth.

In terms of highest absolute variations in units, the ranking won a new leader with Broad spectrum penicillins class J01C growing by +51.3 Thousand units (+93.4%). While the leader in last January, the Anti-depressants and mood stabilisers from the N06A class stepped to second position with a growth of +31.9 Thousand units (+6.3%). 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 +19.8 Thousand units (+194.2%)

The Class C10A Cholesterol and triglyceride regulation preparations also keeps a position in the top ATC ranking with an absolute variation of +30.2 Thousand units (+5.4%). Within this market, Atorvastatin Accord is on the second position in the brand ranking with an observed growth of +27.3 Thousand units (+100.0%) in comparison to last year's homologous period.

Pharma Market | High-Tech

Highest Absolute Variations in Value | February 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.5	16.0%
2	4	L04C - Interleukin inhibitors	1.7	28.3%
3	2	L04B - Anti-TNF products	1.5	9.2%
4	10	D05B - Systemic antipsoriasis products	0.6	53.0%
5	7	L02B - Cytostatic hormone antagonists	0.6	16.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.0	51.3%
2	3	Amgevita	1.7	100.0%
3	1	Kalydeco	1.1	12.6%
4	4	Stelara	0.8	20.1%
5	7	Cosentyx	0.5	24.4%

Highest Absolute Variations in Units | February 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	2.2	11.8%
2	6	L04C - Interleukin inhibitors	1.0	32.2%
3	25	N02C - Anti-migraine preparations	0.6	-
4	18	D05B - Systemic antipsoriasis products	0.4	36.0%
5	32	A07E - Inflammatory bowel disorder prods.	0.3	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.4	54.9%
2	38	Pergoveris	0.6	100.0%
3	9	Cosentyx	0.5	24.2%
4	58	Ajovy	0.4	-
5	68	Entyvio	0.3	-

The High-Tech Market leads the overall Pharma Market in terms of absolute value variation, with the same top 3 maintaining their ranking at both ATC Classes and Brand level.

The L04C - Interleukin inhibitors hold the second position with a growth of +1.7 M€ (+28.3%) keeping two brands in the top five rank: Stelara® and Cosentix®. The D05B - Systemic antipsoriasis products class won the 4th position in the rank with the strong contribution from Tremfya® and Taltz@.

The top 5 products in the Brand ranking are the same as in last month of January 2022.

In terms of Highest Absolute Unit Variation the Anti-TNF L04B class maintains first position in the market with a growth of +2.2 Thousand Units (+11.8%). Within this market, the Biosimilar Amgevita® continues to show the highest growth.

The N02C class, Anti-migraine preparations, stepped up to the third position with +0.6 Thousand units in relation to the homologous period of 2021 with Ajovy@ now in the fourth position of the rank.

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Pharma Market | Excluding High Tech

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Highest Absolute Variations in Value | February 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	13	T03A - Diagnostic equipment and accessories	0.7	55.7%
2	8	A10S - GLP-1 agonist antidiabetics	0.7	33.1%
3	2	B01F - Direct factor Xa inhibitors	0.6	9.9%
4	14	A10P - SGLT2 inhibitor antidiabetics	0.5	33.6%
5	30	G03D - Progestogens excluding G3A G3F	0.3	62.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.71	66.0%
2	1	Eliquis	0.47	100.0%
3	6	Dexcom	0.47	78.3%
4	8	Medtronic	0.26	32.7%
5	14	Forxiga	0.25	52.0%

Highest Absolute Variations in Units | February 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	21	J01C - Broad spectrum penicillins	51.3	93.4%
2	4	N06A - Anti-depressants and mood stabilisers	31.9	6.3%
3	2	C10A - Cholesterol and triglyceride regulating preparations	30.1	5.4%
4	46	G03C - Oestrogens excluding G3A G3E G3F	26.3	121.1%
5	3	A02B - Antiulcerants	24.1	4.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	43.4	8.6%
2	15	Atorvastatin Accord	27.3	100.0%
3	62	Astilin	19.8	194.2%
4	9	Paralief	19.0	25.8%
5	97	Pinamox	15.5	280.2%

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€ (+55.7%). Within this market, Dexcom® and Medtronic® rank in the Top 5 Brands with a variation of +0.47 M€ (78.3%) and +0.26 M€ (+32.7%) respectively.

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€ (+33.1%) with Ozempic® observing a growth of +0.71 M€ (+66.0%) in relation to February 2021. The A10P SGLT2 inhibitors class ranks in fourth place with an increase of +0.5 M€ (33.6%), 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 +0.25 M€ (+52.0%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +0.6 M€ (+9.9%). Within this class, Eliquis® is performing with a growth of +0.47 M€ (+100.0%) 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 two rankings having the exact same top 5 at both ATC Classes and Brand level.

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Pharma Market | Generic

Highest Absolute Variations in Value | February 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	17	Amoxicillin	0.12	103.5%
2	27	Posaconazole	0.11	183.1%
3	35	Dutasteride + Tamsulosin	0.07	130.4%
4	7	Sertraline	0.06	18.1%
5	19	Lansoprazole	0.04	22.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	18	Pinamox	0.10	144.1%
2	26	Posaconazole Accord	0.09	100.0%
3	5	Atorvastatin Accord	0.08	46.6%
4	37	Ezetimibe Krka	0.06	134.4%
5	12	Olanzapine Teva	0.05	36.6%

Highest Absolute Variations in Units | February 2022

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	21	Amoxicillin	23.4	253.4%
2	1	Atorvastatin	18.5	6.5%
3	7	Sertraline	14.7	18.1%
4	3	Rosuvastatin	11.6	7.3%
5	12	Omeprazole	11.5	19.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	4	Atorvastatin Accord	27.3	62.3%
2	32	Pinamox	15.5	100.0%
3	7	Escitalopram Teva	14.1	29.2%
4	29	Sertraline Krka	12.0	110.2%
5	11	Lercanidipine Clonmel	11.6	32.7%

Within the top 5 INNs entities with the highest absolute variation in value Amoxicillin recovered the first position with a growth of +0.12 M€ in comparison to last year's homologous period. The February 2022 absolute variation the antifungal Posaconazole fell to the second position with +0.11 M€ (+183.1%)

Sertraline entered this month top 5 highest value variation directly to the fourth position with a growth of +0.06 M€ (+18.1%) followed by Lansoprazole with +0.04 M€ (+22.1%).

The amoxicillin antibiotic Pinamox@ leads the Brand value ranking.

Amoxicilin leads both highest absolute variations rankings, units and value.

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Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | February 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	2.52	16.0%
2	2	Janssen	1.83	16.6%
3	5	Amgen	1.77	22.4%
4	10	AstraZeneca	0.84	21.1%
5	13	Novo Nordisk	0.66	16.6%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.65	17.2%
2	29	DexCom	0.47	78.3%
3	7	Bristol Myers Squibb	0.46	14.5%
4	9	AstraZeneca	0.35	14.7%
5	6	Clonmel	0.34	10.1%

Highest Absolute Variations in Value | February 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	2.52	16.0%
2	2	Janssen	1.84	18.7%
3	4	Amgen	1.53	24.9%
4	13	AstraZeneca	0.49	30.6%
5	3	Novartis	0.47	5.5%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	5	KRKA	0.26	20.9%
2	6	Pinewood	0.18	15.1%
3	3	Clonmel	0.17	8.8%
4	4	Rowa	0.16	10.6%
5	2	Accord	0.07	1.9%

The total Pharma Market and the High Tech Market, share the same top 4 players with the highest absolute growth in value with Vertex, Janssen, Amgen and AstraZeneca consolidating its positions with the only difference on the fifth position that belongs now to Novo Nordisk on the Pharma market and to Novartis 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 +0.65 M€ (+17.2%) growth when compared to February 2021, with Ozempic@ driving a significative growth.

Among the Generic Market Krka kept the leading growth position with +0.26 M€ (+20.9%).

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | February 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	104.3	13.3%
2	10	KRKA	53.1	17.6%
3	1	Teva	41.6	4.6%
4	12	Pinewood	36.5	19.9%
5	7	GSK	34.6	8.9%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	104.2	13.3%
2	10	KRKA	53.1	17.6%
3	1	Teva	41.4	4.6%
4	12	Pinewood	36.5	19.9%
5	7	GSK	34.8	9.0%

Highest Absolute Variations in Units | February 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	2.69	21.2%
2	9	Janssen	0.85	27.3%
3	10	Accord	0.77	34.1%
4	4	Novartis	0.38	5.3%
5	23	Sanofi	0.36	64.6%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	5	KRKA	51.4	25.5%
2	3	Clonmel	47.2	12.9%
3	6	Pinewood	39.0	22.4%
4	1	Teva	29.0	4.1%
5	4	Rowa	17.3	5.7%

In the total Pharma Market Clonmel continues to steadily rank in first position with the highest variation in units, performing with a growth of +104.3 Thousand units (+13.3%). KRKA also continues to perform in second place with a significant growth in relation to the homologous period of 2021 achieving +53.1 Thousand units (+17.6%).

In terms of unit variation for the Pharma Market excluding the medicines reimbursed under the High Tech Scheme arrangements the ranking shows the same players as in the total Pharma Market.

In the High Tech Market Amgen kept the leadership with an absolute variation of +2.69 Thousand units (+21.2%) followed by Janssen with an absolute variation of +0.85 Thousand units (+27.3%).

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 February 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