Market Watch Ireland

April 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.

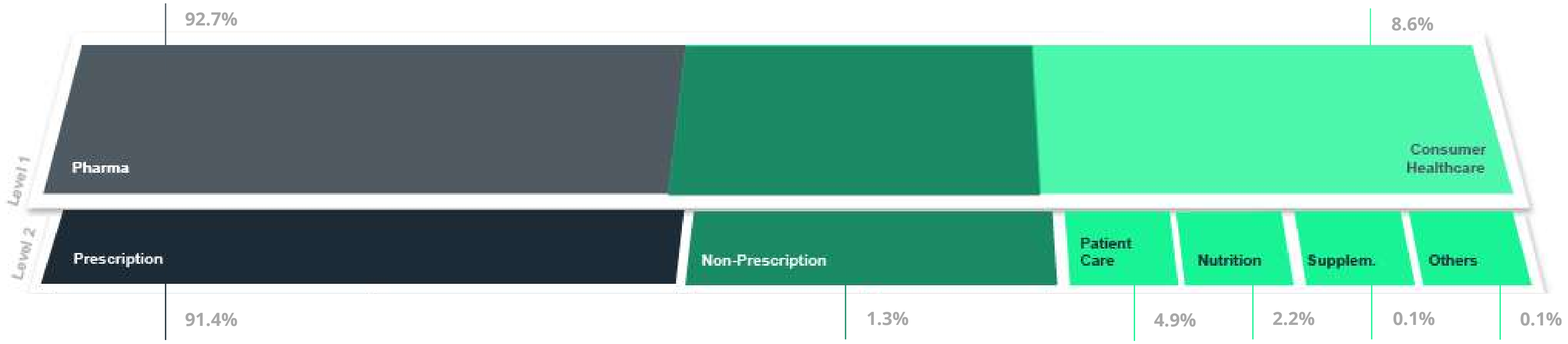
Because we believe that the power of knowledge grows when it is shared. And can change lives.

MARKET WATCH IRELAND – April 2022 – PHARMA MARKET

Total Market

Dynamics of the Pharmacy Channel

April 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	April 2022						MAT April 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	207.7 €	100.0%	6.6%	11.2	100.0%	5.2%	2,466.3 €	100.0%	10.9%	131.9	100.0%	6.1%
Pharma Market	192.5 €	92.7%	6.7%	8.9	80.0%	6.4%	2284.7	92.6%	11.4%	105.2	79.7%	7.2%
Consumer Healthcare	17.9 €	8.6%	4.1%	2.7	23.7%	0.8%	213.5	8.7%	4.7%	31.7	24.0%	2.2%
Prescription Medicines	189.8 €	91.4%	6.8%	8.5	76.3%	6.7%	2,252.8 €	91.3%	11.5%	100.2	76.0%	7.5%
Branded	171.6 €	82.6%	6.6%	5.3	47.9%	5.1%	2,041.5 €	82.8%	11.7%	63.4	48.1%	6.6%
Generic	18.2 €	8.7%	8.7%	3.2	28.4%	9.4%	211.4 €	8.6%	9.5%	36.8	27.9%	8.9%
Non Prescription (OTC)	2.7 €	1.3%	3.1%	0.4	3.7%	1.2%	31.9 €	1.3%	3.9%	5.0	3.8%	1.9%
Branded	2.5 €	1.2%	2.9%	0.4	3.3%	1.3%	29.2 €	1.2%	2.7%	4.4	3.4%	0.6%
Generic	0.2 €	0.1%	5.5%	0.05	0.4%	0.9%	2.6 €	0.1%	18.6%	0.5	0.4%	13.7%
Nutrition	4.6 €	2.2%	-0.2%	1.7	15.1%	1.5%	54.7 €	2.2%	2.6%	20.2	15.3%	3.2%
Patient Care	10.2 €	4.9%	7.6%	0.5	4.6%	-1.2%	121.1 €	4.9%	6.4%	6.2	4.7%	-0.2%
Supplements	0.2 €	0.1%	-7.6%	0.02	0.2%	-6.7%	2.8 €	0.1%	0.5%	0.2	0.2%	-0.8%
Others	0.2 €	0.1%	-23.4%	0.01	0.1%	-11.1%	3.1 €	0.1%	-9.2%	0.2	0.1%	-7.7%

In April 2022 the dispensary retail market increased by +6.6% in value and +5.2% in units, when compared to the same period of the previous year.

The total market holds now a total MAT value of €2,466.3m with 131.9m units dispensed, meaning an average trade price per unit of €18.7.

The Pharma Market currently represents 92.7% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.4% and 1.3% respectively.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +11.4% in value and +7.2% in units while the Consumer Market is growing +4.7% in value and +2.2% in units.

Branded Prescription Only Medicines (POM) represented 82.6% of the whole market value in April and Generic POM accounted for 28.4% of the whole market in units, with similar market shares on the MAT analysis.

Specifically looking at the High-Tech market, these medicines represented in April 65.0% of the market value and only 2.1% of the total units dispensed.

In the MAT of March 2022 the Prescription Generics showed a market share of 27.9% 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 highest market share in the Consumer Market continues to belong to the Patient Care segment with €10.2m (4.9%) for the month of April and €121.1m (4.9%) for the MAT period.

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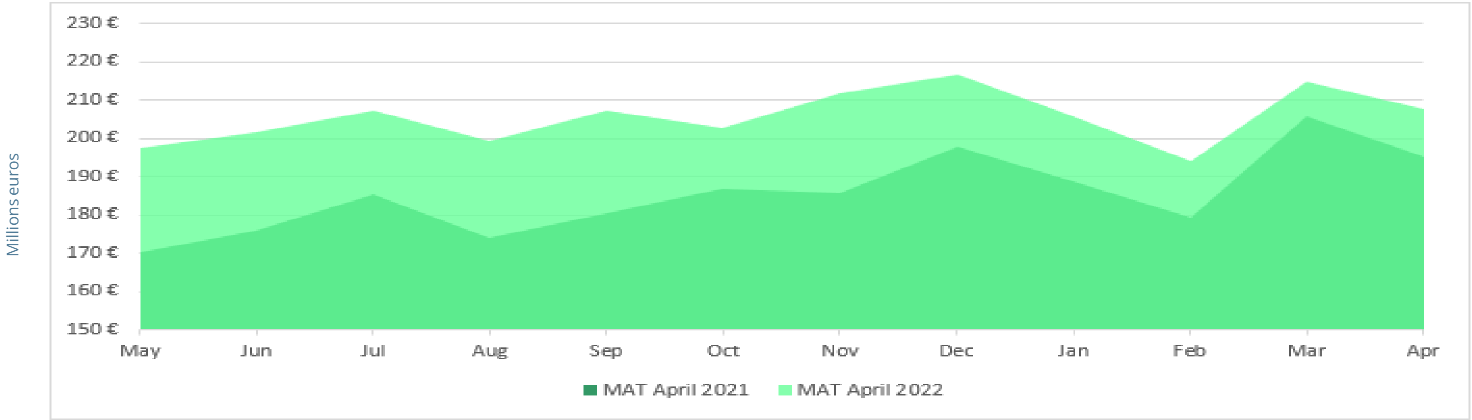
Total Market

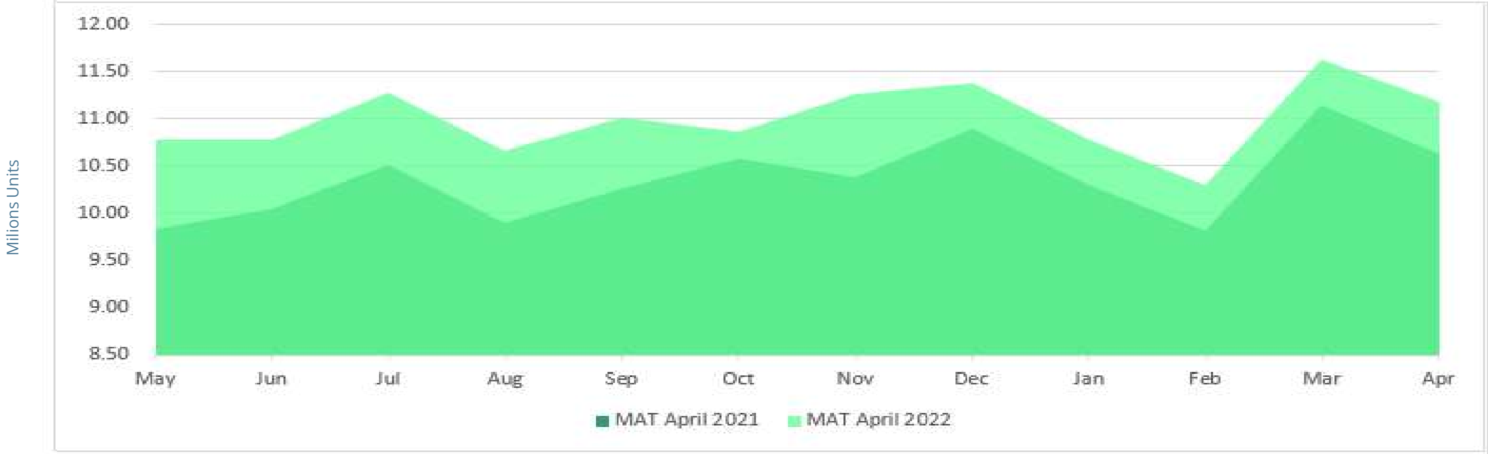
Monthly Evolution in Value

April 2021 – April 2022



Monthly Evolution in Units

April 2021 – April 2022



Compared to April 2021, the Total Market continues to register a more pronounced variation in value than in units but the gap difference seems to be narrowing since May 2021, especially in the values analysis.

In April 2022, a decrease in terms of value and units dispensed is observed when compared to the previous month of March 2022, that can in part be justified by the difference in the total number of days in the two months compared.

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Pharma Market

Highest Absolute Variations in Value | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	3.5	20.4%
2	5	L04C - Interleukin inhibitors	1.8	27.2%
3	15	A10S - GLP-1 agonist antidiabetics	0.9	38.2%
4	8	L02B - Cytostatic hormone antagonists	0.7	16.7%
5	24	D05B - Systemic antipsoriasis products	0.7	54.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.6	60.4%
2	1	Kalydeco	1.4	100.0%
3	4	Amgevita	1.1	28.6%
4	3	Stelara	0.9	22.8%
5	13	Ozempic	0.9	71.7%

Highest Absolute Variations in Units | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	19	J01C - Broad spectrum penicillins	49.8	73.0%
2	1	C10A - Cholesterol and triglyceride regulating preparations	42.0	7.0%
3	3	N06A - Anti-depressants and mood stabilisers	35.4	6.5%
4	42	G03C - Oestrogens excluding G3A G3E G3F	29.7	117.0%
5	2	A02B - Antiulcerants	25.0	4.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	58.7	10.9%
2	9	Paracetamol Accord	46.7	100.0%
3	14	Atorvastatin Accord	25.4	48.0%
4	102	Evorel	16.6	322.0%
5	16	Tritace	16.6	28.0%

Of the Top 5 ATC classes with highest absolute variations in value the Cystic Fibrosis R07B class maintains leadership of the highest variation rank with +€3.7m (+20.4%) compared to the homologous period of 2021. Both Kaftrio® and Kalydeco® continue to rank in the top 5 of the brand values variation ranking, with +€2.6m (+60.4%) for Kaftrio® and +€1.4m (+100.0%) for Kalydeco® that keeps to be the number one brand in the value rank. On the same ATC class Orkambi® had a decrease of -€0.538m (-19.8%).

The Interleukin inhibitors L04C class ranks in second place with a positive variation of +€1.8m (+27.2%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +€0.9m (+22.8%) in relation to the homologous period of 2021. Together with Skyrizi@, Dupixent@ and Cosentyx@ the four brands in the L04C ATC class are showing a growth an aggregate growth of 30.7% in units when compared with April 2021.

For the second consecutive month the Anti-TNF products in the L04B class lost their position in the top 5 with the highest variation, but one brand, Amgevita®, from this class is still on the brands ranking on the third position with a growth of +€1.1m (+28.60%). In this class Idacio@, from Fresenius Kabi, continues to show the highest percentual previous year value growth.

In terms of highest absolute variations in units, the ranking kept the same leader with Broad spectrum penicillins class J01C growing by +49.8 Thousand units (+73.0%). While the leader in last January, the Anti-depressants and mood stabilisers from the N06A class, stepped to second position in February and to third position in march, kept the third position with a growth of +35.4 Thousand units (+6.5%). In the Top 5 of brands with the third highest absolute variation in units is Fortisip with a variation of +58.7 Thousand units (+10.9%).

The Class C10A Cholesterol and triglyceride regulation preparations also kept a position in the top ATC ranking with an absolute variation of +42.0 Thousand units (+7.0%). Within this market, Atorvastatin Accord is on the third position in the brand ranking with an observed growth of +25.4 Thousand units (+48.0%) in comparison to last year's homologous period. With 76 brands in the C10A this class is growing at 7.0% in units but decreasing at -4.0% in value.

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Pharma Market | High-Tech

Highest Absolute Variations in Value | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	3.5	20.4%
2	4	L04C - Interleukin inhibitors	1.8	27.2%
3	7	L02B - Cytostatic hormone antagonists	0.8	18.3%
4	10	D05B - Systemic antipsoriasis products	0.7	55.2%
5	3	L01H - Protein kinase inhibitor antineoplastics	0.7	6.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.6	60.4%
2	1	Kalydeco	1.4	100.0%
3	4	Amgevita	1.1	28.6%
4	3	Stelara	0.9	22.8%
5	25	Tremfya	0.6	150.4%

Highest Absolute Variations in Units | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	2.0	9.5%
2	5	L04C - Interleukin inhibitors	1.1	30.7%
3	23	N02C - Anti-migraine preparations	0.8	-
4	2	L04X - Other immunosuppressants	0.5	2.8%
5	30	A07E - Inflammatory bowel disorder products	0.4	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.2	40.6%
2	50	Ajovy	0.5	100.0%
3	59	Entyvio	0.4	-
4	9	Cosentyx	0.4	18.8%
5	17	Stelara	0.4	28.4%

HMR health market research

The High-Tech Market leads the overall Pharma Market in terms of absolute value variation, with the same leaders maintaining their ranking in both ATC3 and Brand rankings.

The Anti-TNF products of the L04B class continues to lead with the highest variation in units with +2.0 Thousand units (9.5%). With Amgevita@ ranking first in the units rank and the units rank with the highest variation.

The new anti migraine medicine Ajovy@, from Teva, stepped up from third to second position in the units absolute variation ranking with +0.5 Thousand units (100.0%).

On the seventh month with sales the A07E Inflammatory bowel disorder product, Entyvio@, from Takeda, is ranking third in units absolute variation with +0.4 Thousand units.

health market research

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	7	A10S - GLP-1 agonist antidiabetics	0.9	38.2%
2	12	T03A - Diagnostic equipment and accessories	0.7	45.6%
3	2	B01F - Direct factor Xa inhibitors	0.7	10.8%
4	14	A10P - SGLT2 inhibitor antidiabetics	0.5	32.6%
5	39	J01C - Broad spectrum penicillins	0.3	81.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Ozempic	0.88	71.7%
2	1	Eliquis	0.52	100.0%
3	6	Dexcom	0.51	69.5%
4	11	Forxiga	0.31	55.0%
5	65	Utrogestan	0.23	305.2%

Highest Absolute Variations in Units | April 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	20	J01C - Broad spectrum penicillins	49.8	73.0%
2	2	C10A - Cholesterol and triglyceride regulating preparations	42.0	7.0%
3	4	N06A - Anti-depressants and mood stabilisers	35.4	6.5%
4	43	G03C - Oestrogens excluding G3A G3E G3F	29.7	117.0%
5	3	A02B - Antiulcerants	24.9	4.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	58.7	10.9%
2	9	Paracetamol Accord	46.7	100.0%
3	14	Atorvastatin Accord	25.4	48.0%
4	102	Evorel	16.6	322.0%
5	16	Tritace	16.6	28.0%

When analysing the Pharma Market excluding the medicines reimbursement under the High Tech Scheme arrangements, the antidiabetic classes, A10S and A10P hold now first and fourth position in the absolute value variation rankings. The Class A10S GLP-1 agonists presents a variation of +€0.9m (+38.2%) with Ozempic® observing a growth of +€0.88m (+71.7%) in relation to April 2021. The A10P SGLT2 inhibitors class increased by +0.5 M€ (32.6%), 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 growth of +€0.31m (+55.0%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +€0.6m (+8.2%). Within this class, Eliquis® is in the top position of the brand rank value and on the second position of the brands highest value variation a growth of +€0.52m (+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.

Pharma Market | Generic

Highest Absolute Variations in Value | April 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	4	Lenalidomide	0.50	-
2	17	Amoxicillin	0.13	86.3%
3	33	Dutasteride + Tamsulosin	0.08	108.7%
4	29	Paracetamol	0.08	76.0%
5	7	Sertraline	0.06	17.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	10	Lenalidomide Accord	0.21	-
2	16	Lenalidomide Rowex	0.19	100.0%
3	23	Paracetamol Accord	0.08	93.6%
4	22	Pinamox	0.08	90.5%
5	5	Atorvastatin Accord	0.07	32.4%

Highest Absolute Variations in Units | April 2022

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	6	Paracetamol	46.4	78.2%
2	1	Atorvastatin	26.0	8.5%
3	22	Amoxicillin	19.8	130.2%
4	3	Rosuvastatin	15.7	9.2%
5	8	Sertraline	15.3	17.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Paracetamol Accord	46.6	82.8%
2	5	Atorvastatin Accord	25.4	100.0%
3	7	Escitalopram Teva	15.1	28.5%
4	65	Metformin Pinewood	11.5	1017.2%
5	38	Pinamox	11.4	131.9%

Within the top 5 INNs with the highest absolute variation in value Lenalidomide kept the first position with a growth of +€0.50m with Revlimid@ having generic competition from Accord, Rowex and Teva.

Sertraline that had entered the top 5 highest value variation last month lost now one position to fifth with a growth of +€0.06m (+17.3%).

In units Paracetamol had the highest increase with 46.4 Thousand units (+78.2%), followed by Atorvastatin that keeps it first position in the units ranking.

Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | April 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	3.50	20.4%
2	2	Janssen	2.29	19.6%
3	4	Amgen	1.11	12.7%
4	3	Novartis	0.85	7.3%
5	10	Novo Nordisk	0.83	18.8%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.79	18.8%
2	7	Bristol Myers Squibb	0.52	14.9%
3	26	DexCom	0.51	69.5%
4	6	Clonmel	0.27	7.2%
5	1	GSK	0.24	3.8%

Highest Absolute Variations in Value | April 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	3.50	20.4%
2	2	Janssen	2.36	22.8%
3	4	Amgen	0.93	13.5%
4	3	Novartis	0.75	8.0%
5	13	AstraZeneca	0.56	44.7%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Accord	0.44	11.0%
2	4	Rowa	0.34	20.0%
3	3	Clonmel	0.26	11.9%
4	5	KRKA	0.18	12.3%
5	2	Teva	0.17	4.1%

The total Pharma Market and the High-Tech Market, share the same top 4 companies with the highest absolute growth in value: Vertex, Janssen, Amgen and Novartis.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +€0.79m (+18.8%) growth when compared to April 2021, with Ozempic@ driving a significative growth.

Among the Generic Market Accord stepped ahead of competition leading the rank value and the rank with the highest absolute variation with +€0.44m (+11.0%).

Top 5 Companies |By Sell-Out Units

Highest Absolute Variations in Units | April 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Accord	91.7	10.2%
2	1	Teva	63.0	6.6%
3	4	Clonmel	58.5	6.6%
4	12	Pinewood	47.6	23.3%
5	10	KRKA	44.2	12.9%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Accord	90.8	10.1%
2	1	Teva	62.5	6.5%
3	4	Clonmel	58.5	6.6%
4	12	Pinewood	47.6	23.3%
5	10	KRKA	44.2	12.9%

Highest Absolute Variations in Units | April 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	2.24	15.8%
2	9	Janssen	0.97	29.2%
3	10	Accord	0.81	32.1%
4	3	Novartis	0.49	6.2%
5	11	Teva	0.47	19.6%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Accord	84.3	11.9%
2	3	Clonmel	62.6	15.8%
3	1	Teva	51.5	6.9%
4	6	Pinewood	45.6	23.3%
5	5	KRKA	42.9	18.3%

HMR health market research

In the total Pharma Market, the Pharma Market Excluding the High-Tech and the Generic Market the same five companies share the ranking of highest absolute variation. Teva leads the rank of the three segments.

In the High Tech Market Amgen kept the leadership with an absolute variation of +2.24 Thousand units (+15.8%) followed by Janssen with an absolute variation of +0.97 Thousand units (+29.2%).

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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 April 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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