Market Watch Ireland

March 2022

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Country Manager

Knowledge for better health

We believe in the power of Knowledge.

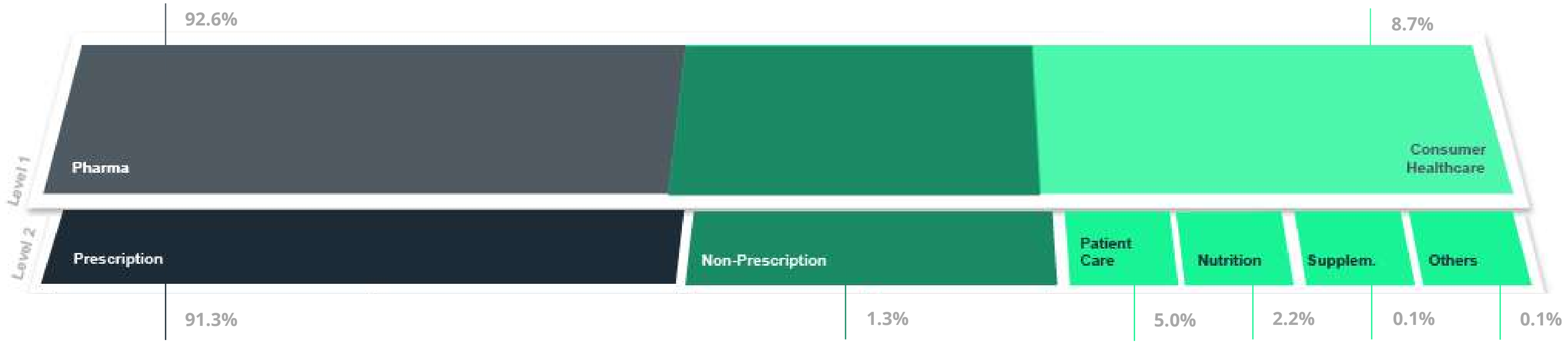
A deep knowledge of the market is the first step to deliver unique market insights. It’s that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyze the market.

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

Total Market

Dynamics of the Pharmacy Channel

March 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	March 2022						MAT March 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	214.9 €	100.0%	4.4%	11.6	100.0%	4.3%	2,453.6 €	100.0%	11.7%	131.4	100.0%	6.5%
Pharma Market	199.0 €	92.6%	4.4%	9.3	80.2%	5.7%	2272.5	92.6%	12.2%	104.6	79.7%	7.4%
Consumer Healthcare	18.7 €	8.7%	4.1%	2.7	23.5%	-0.9%	212.8	8.7%	4.9%	31.7	24.1%	2.7%
Prescription Medicines	196.1 €	91.3%	4.5%	8.9	76.5%	6.0%	2,240.7 €	91.3%	12.4%	99.7	75.9%	7.7%
Branded	177.6 €	82.7%	4.5%	5.6	48.4%	6.1%	2,030.8 €	82.8%	12.6%	63.2	48.1%	6.9%
Generic	18.5 €	8.6%	4.2%	3.3	28.1%	5.9%	209.9 €	8.6%	9.9%	36.5	27.8%	9.2%
Non Prescription (OTC)	2.8 €	1.3%	2.4%	0.4	3.8%	0.7%	31.8 €	1.3%	4.3%	5.0	3.8%	2.2%
Branded	2.6 €	1.2%	1.7%	0.4	3.4%	0.2%	29.2 €	1.2%	2.9%	4.4	3.4%	0.5%
Generic	0.2 €	0.1%	10.5%	0.05	0.4%	4.7%	2.6 €	0.1%	23.8%	0.5	0.4%	18.9%
Nutrition	4.7 €	2.2%	-1.4%	1.7	14.9%	-1.0%	54.7 €	2.2%	3.3%	20.1	15.3%	3.7%
Patient Care	10.7 €	5.0%	8.2%	0.5	4.6%	-1.3%	120.4 €	4.9%	6.2%	6.2	4.7%	0.3%
Supplements	0.2 €	0.1%	-4.4%	0.02	0.2%	-4.8%	2.8 €	0.1%	2.2%	0.2	0.2%	0.7%
Others	0.3 €	0.1%	-19.2%	0.01	0.1%	-10.2%	3.1 €	0.1%	-5.5%	0.2	0.1%	-6.4%

In March 2022 the dispensary retail market increased by +4.4% in value and +4.3% in units, when compared to the same period of the previous year.

The market holds now a total MAT value of € 2,453.6 Millions with 131.4 Million units dispensed, meaning an average trade price per unit of €18.68.

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.

The moving annual total (MAT) analysis shows that the Pharma Market is growing at +12.2% in value and +7.4% in units while the Consumer Market is growing +4.9% in value and +2.7% in units.

Branded Prescription Only Medicines (POM) represented 82.7% of the whole market value in March, Generic POM accounted for 28.1% of the whole market units, with similar market shares on the MAT analysis as well.

Specifically looking at the High-Techs market, these medicines represented 63.5% of the market value but only 2.1% of the total units dispensed.

In March 2022 MAT the Prescription Generics showed 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 5.0% and 2.2% respectively.

The highest market share in the Consumer Market continues to belong to the Patient Care segment with €10.7m (5.0%) for the month of March and €120.4m (6.2%) for the MAT period.

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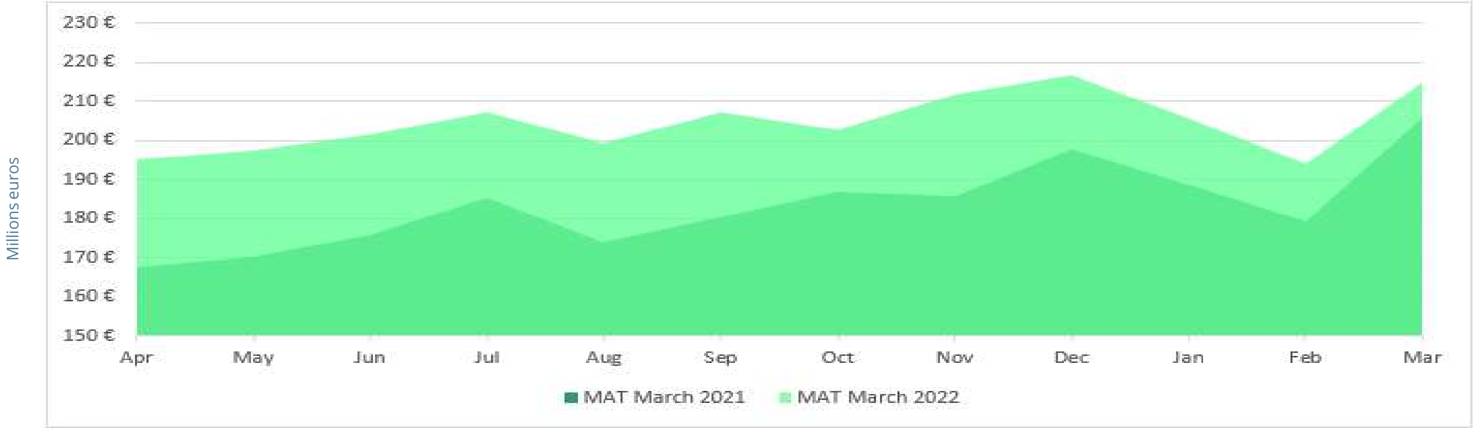
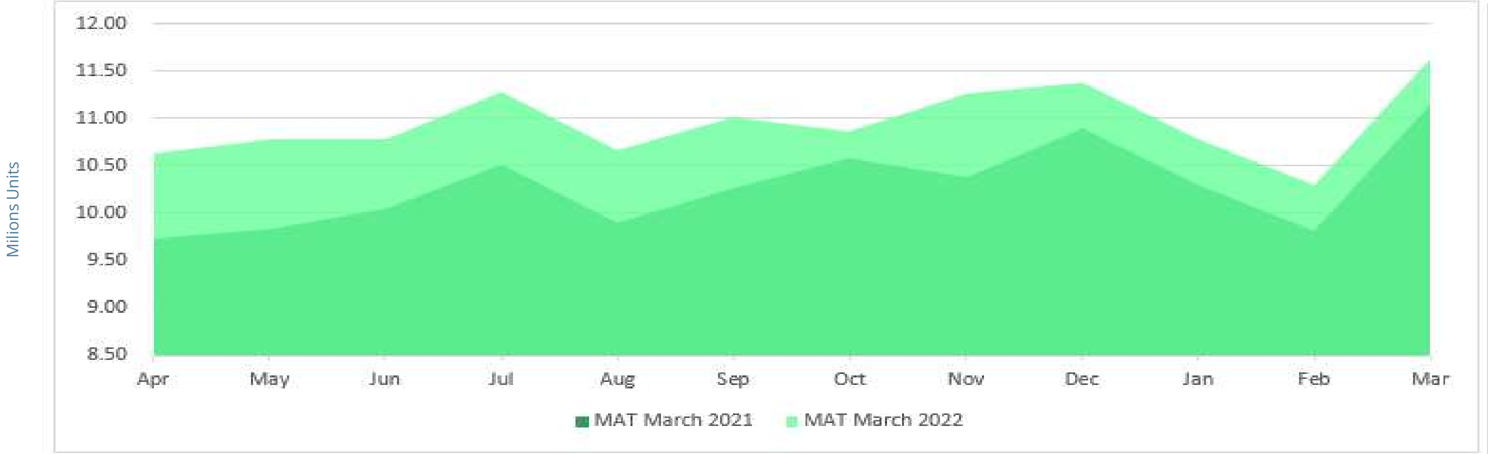
Total Market

Monthly Evolution in Value
March 2021 – March 2022



Monthly Evolution in Units
March 2021 – March 2022



Compared to March 2021, the Total Market continues to register a more pronounced variation in value than in units but this time with only a 0.13 pp variation.

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

Pharma Market

Highest Absolute Variations in Value | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.7	15.3%
2	5	L04C - Interleukin inhibitors	1.9	27.1%
3	17	A10S - GLP-1 agonist antidiabetics	0.8	31.6%
4	21	T03A - Diagnostic equipment and accessories	0.7	48.3%
5	23	D05B - Systemic antipsoriasis products	0.6	38.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.2	47.1%
2	4	Amgevita	1.1	100.0%
3	3	Stelara	0.9	19.6%
4	1	Kalydeco	0.9	8.2%
5	15	Ozempic	0.8	61.5%

Highest Absolute Variations in Units | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	16	J01C - Broad spectrum penicillins	76.0	119.4%
2	43	G03C - Oestrogens excluding G3A G3E G3F	30.5	120.4%
3	3	N06A - Anti-depressants and mood stabilisers	28.9	5.0%
4	1	C10A - Cholesterol and triglyceride regulating preparations	26.8	4.2%
5	35	H02A - Systemic corticosteroids plain	24.8	52.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	33.5	5.9%
2	16	Atorvastatin Accord	23.7	100.0%
3	39	Augmentin	22.3	83.4%
4	5	Ventolin	20.1	16.7%
5	89	Pinamox	19.0	278.0%

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 +€2.7m (+15.3%) 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 +€2.2m (+47.1%) for Kaftrio® and +€0.9m (+8.2%) for Kalydeco®. On the same ATC class Orkambi® had a significative decrease with -€0.273m.

The Interleukin inhibitors L04C class ranks in second place with a positive variation of +€1.9m (+27.1%). Within this market, Stelara® continues to hold its position in the top 5 brands with a growth +€0.9m (+19.6%) in relation to the homologous period of 2021. Skyrizi@ has now joined this ATC where Cosentyx@ and Dupixent@ continue to develop.

This month the Anti-TNF products L04B class lost their position in the top 5 with the highest variation, but one brand from this class is still on the brands ranking, that is the Biosimilar medicine Amgevita® ranking second with a growth of +€1.1m (+100.0%). 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 kept the same leader with Broad spectrum penicillins class J01C growing by +76.0 Thousand units (+119.4%). 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 with a growth of +28.9 Thousand units (+5.0%). In the Top 5 of brands with the third highest absolute variation in units is Fortisip with a variation of +33.5 Thousand units (+5.9%).

The Class C10A Cholesterol and triglyceride regulation preparations also kept a position in the top ATC ranking with an absolute variation of +26.8 Thousand units (+4.2%). Within this market, Atorvastatin Accord is on the second position in the brand ranking with an observed growth of +33.5 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 | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	2.7	15.3%
2	4	L04C - Interleukin inhibitors	1.9	27.1%
3	10	D05B - Systemic antipsoriasis products	0.6	38.9%
4	7	L02B - Cytostatic hormone antagonists	0.4	9.8%
5	18	L01L - PARP inhibitor antineoplastics	0.4	99.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.2	47.1%
2	4	Amgevita	1.1	100.0%
3	3	Stelara	0.9	19.6%
4	1	Kalydeco	0.9	8.2%
5	7	Cosentyx	0.5	21.6%

Highest Absolute Variations in Units | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	1.6	7.1%
2	6	L04C - Interleukin inhibitors	1.2	35.0%
3	24	N02C - Anti-migraine preparations	0.7	-
4	2	L04X - Other immunosuppressants	0.7	3.8%
5	31	A07E - Inflammatory bowel disorder products	0.4	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.2	40.5%
2	11	Cosentyx	0.5	100.0%
3	52	Ajovy	0.5	-
4	66	Entyvio	0.4	-
5	44	Pergoveris	0.4	155.6%

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

The Anti-TNF products L04B class continues to lead with the highest variation in units with +1.6 Thousand units (7.1%).

The new anti migraine medicine Ajovy@, from Teva, is now ranking third in the units absolute variation ranking.

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Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	8	A10S - GLP-1 agonist antidiabetics	0.8	31.6%
2	14	A10P - SGLT2 inhibitor antidiabetics	0.5	32.2%
3	2	B01F - Direct factor Xa inhibitors	0.5	8.2%
4	38	J01C - Broad spectrum penicillins	0.5	118.8%
5	30	G03D - Progestogens excluding G3A G3F	0.3	43.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	4	Ozempic	0.77	61.5%
2	6	Dexcom	0.50	100.0%
3	1	Eliquis	0.45	12.1%
4	13	Forxiga	0.30	53.3%
5	8	Medtronic	0.28	30.7%

Highest Absolute Variations in Units | March 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	17	J01C - Broad spectrum penicillins	76.0	119.4%
2	44	G03C - Oestrogens excluding G3A G3E G3F	30.5	120.4%
3	4	N06A - Anti-depressants and mood stabilisers	28.9	5.0%
4	2	C10A - Cholesterol and triglyceride regulating preparations	26.7	4.2%
5	36	H02A - Systemic corticosteroids plain	24.8	52.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Fortisip	33.5	5.9%
2	16	Atorvastatin Accord	23.7	100.0%
3	39	Augmentin	22.3	83.4%
4	5	Ventolin	20.1	16.7%
5	89	Pinamox	19.0	278.0%

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 second position the absolute value variation rankings. The Class A10S GLP-1 agonists now presents a variation of +€0.8m (+31.6%) with Ozempic® observing a growth of +€0.77m (+61.5%) in relation to march 2021. The A10P SGLT2 inhibitors class increase by +0.5 M€ (32.2%), 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 +€0.30m (+53.3%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +€0.6m (+8.2%). Within this class, Eliquis® is performing with a growth of +€0.45m (+12.1%) 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

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Highest Absolute Variations in Value | March 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	24	Lenalidomide	0.23	-
2	14	Amoxicillin	0.18	132.7%
3	30	Posaconazole	0.11	147.9%
4	33	Clarithromycin	0.08	103.2%
5	38	Dutasteride + Tamsulosin	0.07	92.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	29	Lenalidomide Rowex	0.14	-
2	10	Pinamox	0.14	100.0%
3	57	Lenalidomide Accord	0.09	-
4	31	Posaconazole Accord	0.07	108.0%
5	6	Atorvastatin Accord	0.06	28.8%

Highest Absolute Variations in Units | March 2022

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	19	Amoxicillin	31.1	260.3%
2	1	Atorvastatin	17.0	5.3%
3	7	Sertraline	14.9	16.0%
4	31	Clarithromycin	12.8	103.5%
5	3	Rosuvastatin	11.5	6.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	5	Atorvastatin Accord	23.7	43.4%
2	29	Pinamox	19.0	100.0%
3	7	Escitalopram Teva	14.6	26.4%
4	63	Metformin Pinewood	12.7	10401.9%
5	32	Amoclav	12.3	108.2%

Within the top 5 INNs with the highest absolute variation in value Amoxicillin lost the first position to Lenalidomide that is showing a growth of +€0.23m with Revlimid@ having generic competition from Rowex, Accord and Teva. The February 2022 absolute variation the antifungal Posaconazole fell to the third position with +0.11 M€ (+147.9%)

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@ lost first position and is now second on the absolute variation brand value ranking.

Amoxicilin keeps its place in the top 5 in both highest absolute variations rankings, units and value.

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Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | March 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	2.75	15.3%
2	2	Janssen	1.56	12.3%
3	5	Amgen	0.96	10.3%
4	10	Novo Nordisk	0.68	15.0%
5	3	Novartis	0.60	4.9%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.69	16.0%
2	29	DexCom	0.50	67.1%
3	9	AstraZeneca	0.48	17.6%
4	7	Bristol Myers Squibb	0.45	12.4%
5	5	Clonmel	0.42	10.9%

Highest Absolute Variations in Value | March 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	2.75	15.3%
2	2	Janssen	1.60	14.0%
3	4	Amgen	0.76	10.4%
4	3	Novartis	0.58	6.0%
5	22	Sanofi	0.49	234.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	4	Rowa	0.27	15.7%
2	5	KRKA	0.21	14.5%
3	3	Clonmel	0.21	9.4%
4	6	Pinewood	0.20	14.3%
5	2	Accord	0.08	1.9%

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The total Pharma Market and the High Tech Market, share the same top 3 companies with the highest absolute growth in value: Vertex, Janssen and Amgen.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +€0.69m (+16.0%) growth when compared to march 2021, with Ozempic@ driving a significative growth.

Among the Generic Market Rowa stepped ahead of Krka in the leading growth position with +€0.27m (+15.7%).

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | March 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	103.9	11.5%
2	1	Teva	59.9	5.9%
3	6	GSK	56.8	13.0%
4	10	KRKA	52.5	15.2%
5	12	Pinewood	47.7	22.7%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	103.9	11.5%
2	1	Teva	59.4	5.8%
3	6	GSK	56.7	13.0%
4	10	KRKA	52.5	15.2%
5	12	Pinewood	47.7	22.7%

Highest Absolute Variations in Units | March 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	2.19	14.3%
2	10	Accord	0.95	37.7%
3	3	Novartis	0.82	10.1%
4	9	Janssen	0.56	14.9%
5	11	Teva	0.50	19.4%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	54.5	13.1%
2	5	KRKA	50.1	21.3%
3	6	Pinewood	48.1	24.0%
4	1	Teva	33.2	4.2%
5	4	Rowa	16.7	4.9%

In the total Pharma Market Clonmel continues to steadily rank in first position with the highest variation in units, performing with a growth of +103.9 Thousand units (+11.5%).

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 +2.19 Thousand units (+14.3%) followed by Accord with an absolute variation of +0.95 Thousand units (+37.7%).

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 March 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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