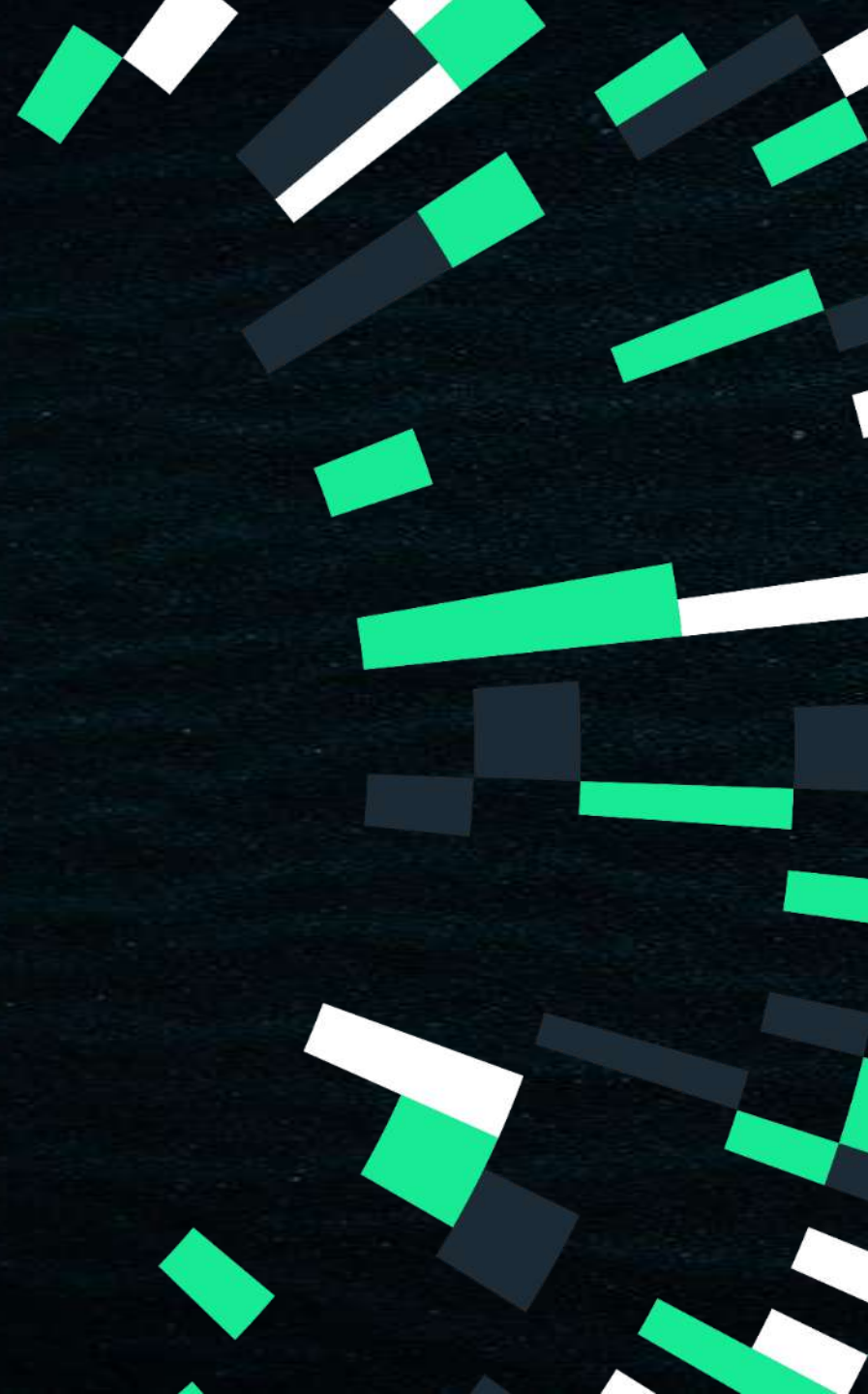


# Market Watch Ireland

May 2022

**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.**

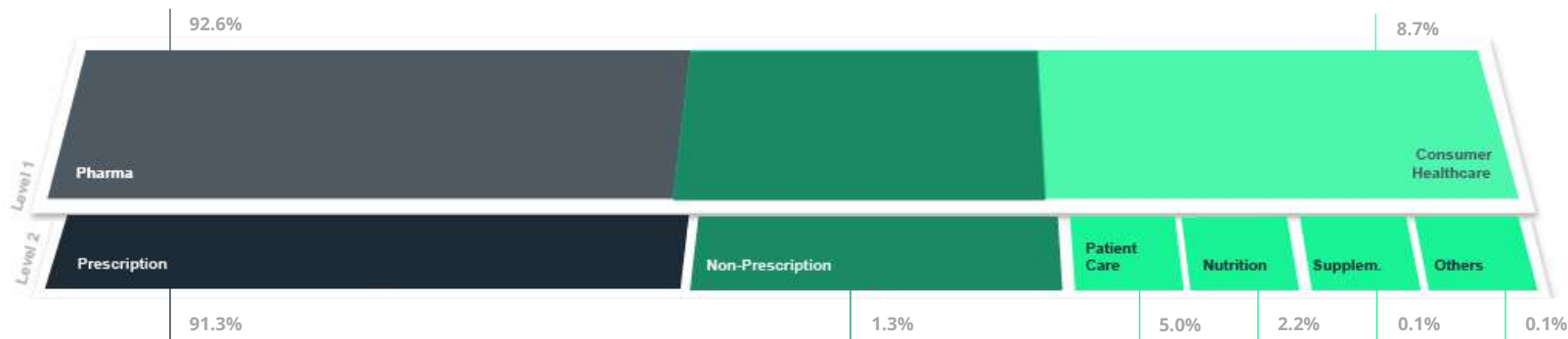


# Total Market

## Dynamics of the Pharmacy Channel

May 2022

Weight by segment and subsegments (value)



In May 2022 the dispensary retail market increased by +7.8% in value and +5.7% in units, when compared to the same period of the previous year.

The total market holds now a total MAT value of €2,481.7m with 132.5m units dispensed, meaning an average trade price per unit of €18.7.

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 +10.7% in value and +7.0% in units while the Consumer Market is growing +4.3% in value and +1.4% in units.

## Dynamics of the Pharmacy Channel

By subsegments

	May 2022						MAT May 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
<b>Total Market</b>	<b>212.8 €</b>	<b>100.0%</b>	<b>7.8%</b>	<b>11.4</b>	<b>100.0%</b>	<b>5.7%</b>	<b>2,481.7 €</b>	<b>100.0%</b>	<b>10.2%</b>	<b>132.5</b>	<b>100.0%</b>	<b>5.8%</b>
<b>Pharma Market</b>	<b>197.1 €</b>	<b>92.6%</b>	<b>8.0%</b>	<b>9.1</b>	<b>80.1%</b>	<b>7.5%</b>	<b>2,299.4</b>	<b>92.7%</b>	<b>10.7%</b>	<b>105.8</b>	<b>79.8%</b>	<b>7.0%</b>
<b>Consumer Healthcare</b>	<b>18.5 €</b>	<b>8.7%</b>	<b>4.7%</b>	<b>2.7</b>	<b>23.7%</b>	<b>-0.6%</b>	<b>214.3</b>	<b>8.6%</b>	<b>4.3%</b>	<b>31.7</b>	<b>23.9%</b>	<b>1.4%</b>
<b>Prescription Medicines</b>	194.3 €	91.3%	8.1%	8.7	76.3%	7.8%	2,267.4 €	91.4%	10.8%	100.8	76.1%	7.3%
Branded	175.5 €	82.5%	7.9%	5.5	48.1%	6.7%	2,054.3 €	82.8%	11.0%	63.8	48.1%	6.5%
Generic	18.8 €	8.8%	10.4%	3.2	28.2%	9.6%	213.1 €	8.6%	9.2%	37.0	28.0%	8.7%
<b>Non Prescription (OTC)</b>	2.7 €	1.3%	3.5%	0.4	3.7%	2.2%	32.0 €	1.3%	3.4%	5.0	3.8%	1.5%
Branded	2.5 €	1.2%	3.4%	0.4	3.3%	2.4%	29.3 €	1.2%	2.5%	4.5	3.4%	0.7%
Generic	0.2 €	0.1%	4.5%	0.05	0.4%	1.0%	2.6 €	0.1%	13.8%	0.5	0.4%	9.0%
<b>Nutrition</b>	4.7 €	2.2%	-1.8%	1.7	15.0%	-1.6%	54.6 €	2.2%	1.5%	20.1	15.2%	2.1%
<b>Patient Care</b>	10.7 €	5.0%	8.2%	0.5	4.7%	0.7%	121.9 €	4.9%	6.4%	6.2	4.7%	-0.5%
<b>Supplements</b>	0.2 €	0.1%	-5.0%	0.02	0.2%	-2.5%	2.8 €	0.1%	-0.8%	0.2	0.2%	-1.6%
<b>Others</b>	0.2 €	0.1%	8.4%	0.01	0.1%	-3.5%	3.1 €	0.1%	-6.8%	0.2	0.1%	-7.9%

Branded Prescription Only Medicines (POM) represented 82.5% of the whole market value in April and Generic POM accounted for 28.0% of the whole market in units, with similar market shares on the MAT analysis.

Specifically looking at the High-Tech market, in May these medicines represented 65.7% of the market value but only 2.1% of the total units dispensed.

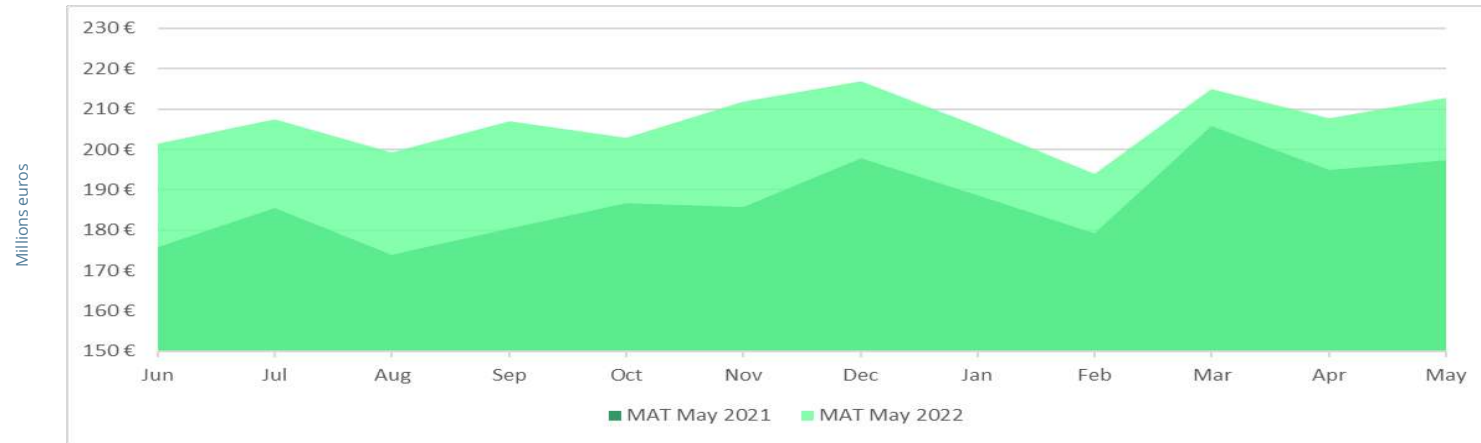
The Consumer Market currently represents 8.6% of the total dispensary market value, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 4.9% and 2.2% respectively.

The highest market share in the Consumer Market continues to belong to the Patient Care segment with €10.7m (4.9%) for the month of May and €121.9m (4.9%) for the MAT period.

# Total Market

## Monthly Evolution in Value

May 2021 – May 2022

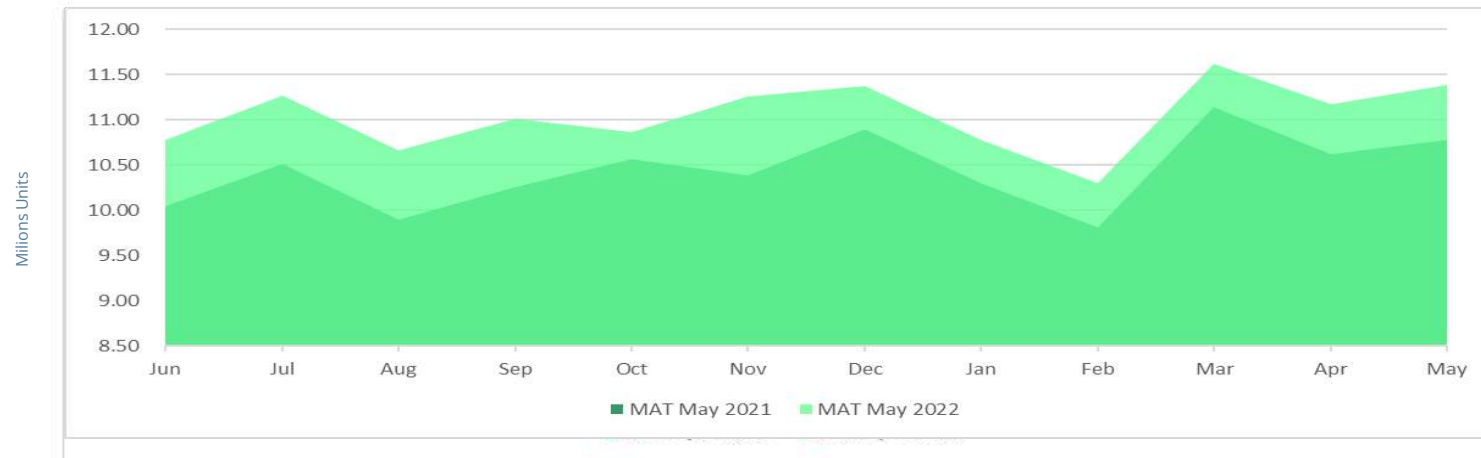


Compared to May 2021, the Total Market continues to register a more pronounced variation in value than in units.

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

## Monthly Evolution in Units

May 2021 – May 2022



# Pharma Market



## Highest Absolute Variations in Value | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	4.5	26.1%
2	5	L04C - Interleukin inhibitors	1.6	23.5%
3	14	A10S - GLP-1 agonist antidiabetics	1.0	42.1%
4	8	L02B - Cytostatic hormone antagonists	1.0	22.7%
5	3	L01H - Protein kinase inhibitor antineoplastics	0.8	7.0%

## Highest Absolute Variations in Units | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	18	J01C - Broad spectrum penicillins	53.5	72.8%
2	2	C10A - Cholesterol and triglyceride regulating preparations	44.3	7.3%
3	4	N06A - Anti-depressants and mood stabilisers	39.9	7.3%
4	40	G03C - Oestrogens excluding G3A G3E G3F	34.0	116.4%
5	3	A02B - Antiulcerants	28.7	5.1%

### Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.9	62.9%
2	1	Kalydeco	2.1	100.0%
3	3	Amgevita	1.2	29.2%
4	11	Ozempic	1.0	76.9%
5	7	Zytiga	0.7	33.9%

### Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	13	Paracetamol Accord	39.1	91.4%
2	1	Fortisip	37.2	100.0%
3	84	Evorel	18.4	246.8%
4	40	Augmentin	16.4	55.3%
5	15	Atorvastatin Accord	15.8	24.4%

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 +€4.5m (+26.1%) 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 +€2.9m (+62.9%) for Kaftrio® and +€2.1m (+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 -€0.502m (-20.6%).

The Interleukin inhibitors L04C class ranks in second place with a positive variation of +€1.6m (+23.5%). Within this market, Stelara® lost its position in the top 5 brands in relation to last month. Together with Skyrizi®, Dupixent® and Cosentyx® the four brands in the L04C ATC class are showing an aggregate growth of 31.1% in units and 23.5% in value when compared with May 2021.

For the third 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 +€1.2m (+29.2%). 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 +53.5 Thousand units (+72.8%). 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 +39.9 Thousand units (+7.3%). In the Top 5 of brands with the third highest absolute variation in units is Fortisip with a variation of +37.2 Thousand units (+100.0%).

The Class C10A Cholesterol and triglyceride regulation preparations also kept a position in the top ATC ranking with an absolute variation of +44.3 Thousand units (+7.3%). Within this market, Atorvastatin Accord is on the fifth position in the brand variation ranking with an observed growth of +15.8 Thousand units (+24.4%) in comparison to last year's homologous period.

# Pharma Market | High-Tech



## Highest Absolute Variations in Value | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	4.5	26.1%
2	4	L04C - Interleukin inhibitors	1.6	23.5%
3	6	L02B - Cytostatic hormone antagonists	1.5	46.3%
4	3	L01H - Protein kinase inhibitor antineoplastics	0.8	7.0%
5	2	L04B - Anti-TNF products	0.6	3.7%

## Highest Absolute Variations in Units | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	L04B - Anti-TNF products	2.6	12.6%
2	5	L04C - Interleukin inhibitors	1.1	31.1%
3	23	N02C - Anti-migraine preparations	0.9	-
4	2	L04X - Other immunosuppressants	0.6	3.6%
5	30	A07E - Inflammatory bowel disorder products	0.5	-

### Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.9	62.9%
2	1	Kalydeco	2.1	100.0%
3	3	Amgevita	1.2	29.2%
4	6	Zytiga	0.7	33.9%
5	17	Xtandi	0.7	136.6%

### Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.3	41.3%
2	43	Ajovy	0.6	100.0%
3	9	Cosentyx	0.5	23.6%
4	54	Entyvio	0.5	-
5	36	Pergoveris	0.5	158.0%

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

The Anti-TNF products of the L04B class continues to lead with the highest variation in units with +2.6 Thousand units (.5%). With Amgevita@ ranking first in the units rank and the units rank with the highest variation.

Zytiga@ and Xtandi@ are leading the previous year growth value on their L02B Cytostatic Hormone Antagonists and ranking 4<sup>th</sup> and 5<sup>th</sup> on the absolute value variation ranking.

The new anti migraine medicine Ajovy@, from Teva, kept the second position in the units absolute variation ranking with +0.6 Thousand units (100.0%).

On the eighth month with sales the A07E Inflammatory bowel disorder product, Entyvio@, from Takeda, is now ranking fourth in units absolute variation with +0.5 Thousand units.

# Pharma Market | Excluding High Tech



## Highest Absolute Variations in Value | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	7	A10S - GLP-1 agonist antidiabetics	1.0	42.1%
2	11	T03A - Diagnostic equipment and accessories	0.7	47.0%
3	2	B01F - Direct factor Xa inhibitors	0.7	11.2%
4	14	A10P - SGLT2 inhibitor antidiabetics	0.6	34.0%
5	28	G03D - Progestogens excluding G3A G3F	0.3	51.1%

## Highest Absolute Variations in Units | May 2022

### ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	18	J01C - Broad spectrum penicillins	53.5	72.8%
2	2	C10A - Cholesterol and triglyceride regulating preparations	44.3	7.3%
3	4	N06A - Anti-depressants and mood stabilisers	39.9	7.3%
4	40	G03C - Oestrogens excluding G3A G3E G3F	34.0	116.4%
5	3	A02B - Antiulcerants	28.3	5.0%

### Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Ozempic	1.02	76.9%
2	1	Eliquis	0.55	100.0%
3	6	Dexcom	0.55	68.1%
4	11	Forxiga	0.33	55.7%
5	3	Prolia	0.28	14.2%

### Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	13	Paracetamol Accord	39.1	91.4%
2	1	Fortisip	37.2	100.0%
3	84	Evorel	18.4	246.8%
4	40	Augmentin	16.4	55.3%
5	15	Atorvastatin Accord	15.8	24.4%

When analysing the Pharma Market excluding the medicines reimbursement under the High Tech Scheme arrangements, the antidiabetic classes, A10S and A10P hold first and fourth position in the absolute value variation rankings. The Class A10S GLP-1 agonists presents a variation of +€1.0m (+42.1%) with Ozempic® observing a growth of +€1.02m (+76.9%) in relation to May 2021. The A10P SGLT2 inhibitors class increased by +0.6 M€ (34.0%), 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® stepped up ahead of Prolia® with a growth of +€0.33m (+55.7%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +€0.7m (+11.2%). 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 +€0.55m (+100.0%) in comparison to last year's homologous period. In this class Eliquis® is followed by Lixiana® as the brands with the highest growth.

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 | May 2022

### INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	3	Lenalidomide	0.65	-
2	16	Amoxicillin	0.14	87.5%
3	26	Posaconazole	0.10	100.7%
4	32	Dutasteride + Tamsulosin	0.08	102.0%
5	7	Sertraline	0.07	18.4%

### Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	5	Lenalidomide Accord	0.29	-
2	9	Lenalidomide Rowex	0.22	100.0%
3	18	Pinamox	0.09	96.4%
4	55	Lenalidomide Clonmel	0.09	-
5	27	Posaconazole Accord	0.07	86.1%

Within the top 5 INNs with the highest absolute variation in value Lenalidomide kept the first position with a growth of +€0.65m.

Sertraline that entered the top 5 highest value variation two months ago kept the fifth position with a growth of +€0.07m (+18.4%).

In units Paracetamol Accord had the highest increase with 39.0 Thousand units (+91.2%), followed by Atorvastatin Accord.

## Highest Absolute Variations in Units | May 2022

### INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	11	Paracetamol	38.5	83.7%
2	1	Atorvastatin	27.5	8.9%
3	19	Amoxicillin	24.3	144.0%
4	6	Sertraline	16.9	18.6%
5	3	Rosuvastatin	15.9	9.1%

### Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	4	Paracetamol Accord	39.0	91.2%
2	5	Atorvastatin Accord	15.8	100.0%
3	32	Pinamox	14.5	152.3%
4	11	Lercanidipine Clonmel	13.0	31.7%
5	40	Doxycycline Pinewood	12.9	201.9%



# Top 5 Companies | By Sell-Out Value



## Highest Absolute Variations in Value | May 2022

### Pharma Market

rank abs	var value	Company	Var. Abs. M€	Var.
1	1	Vertex	4.47	26.1%
2	2	Janssen	1.90	15.5%
3	4	Amgen	1.30	14.4%
4	12	AstraZeneca	1.04	24.7%
5	10	Novo Nordisk	1.01	22.4%

### Pharma Market | Excluding High Tech

rank abs	var value	Company	Var. Abs. M€	Var.
1	3	Novo Nordisk	0.96	22.3%
2	26	DexCom	0.55	68.1%
3	7	Bristol Myers Squibb	0.54	15.4%
4	5	Clonmel	0.36	9.4%
5	9	AstraZeneca	0.32	11.3%

The total Pharma Market and the High-Tech Market, share 4 of the companies in the top 5 with the highest absolute growth in value: Vertex, Janssen, Amgen and AstraZeneca.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +€0.96m (+22.3%) growth when compared to May 2021, with Ozempic@ driving a significant growth.

Among the Generic Market Accord stepped ahead of competition leading the rank value and the rank with the highest absolute variation with +€0.48m (+11.7%). Accord is also leading in the ranking value.

## Highest Absolute Variations in Value | May 2022

### Pharma Market | High Tech

rank abs	var value	Company	Var. Abs. M€	Var.
1	1	Vertex	4.47	26.1%
2	2	Janssen	1.92	17.5%
3	4	Amgen	1.02	14.4%
4	12	Astellas	0.74	51.9%
5	13	AstraZeneca	0.72	53.9%

### Pharma Market | Generic

rank abs	var value	Company	Var. Abs. M€	Var.
1	1	Accord	0.48	11.7%
2	3	Clonmel	0.41	18.9%
3	4	Rowa	0.35	20.6%
4	6	Pinewood	0.22	16.4%
5	2	Teva	0.20	4.8%

# Top 5 Companies | By Sell-Out Units



## Highest Absolute Variations in Units | May 2022

### Pharma Market

rank	var abs	rank value	Company	Var. Abs. Th Units	Var.
1		2	Clonmel	71.1	7.9%
2		3	Accord	69.9	7.7%
3		12	Pinewood	54.9	26.2%
4		1	Teva	50.4	5.2%
5		6	GSK	47.1	11.1%

### Pharma Market | Excluding High Tech

rank	var abs	rank value	Company	Var. Abs. Th Units	Var.
1		2	Clonmel	70.9	7.8%
2		3	Accord	68.8	7.6%
3		12	Pinewood	54.9	26.2%
4		1	Teva	49.8	5.1%
5		6	GSK	47.0	11.1%

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. This month Clonmel stepped ahead of Teva leading the rank of the three segments.

In the High Tech Market Amgen kept the leadership with an absolute variation of +1.96 Thousand units (+13.2%) followed by Accord with an absolute variation of +1.08 Thousand units (+40.6%).

## Highest Absolute Variations in Units | May 2022

### Pharma Market | High Tech

rank	var abs	rank value	Company	Var. Abs. Th Units	Var.
1		1	Amgen	1.96	13.2%
2		10	Accord	1.08	40.6%
3		3	Novartis	1.01	13.3%
4		11	Teva	0.65	26.3%
5		9	Janssen	0.55	14.5%

### Pharma Market | Generic

rank	var abs	rank value	Company	Var. Abs. Th Units	Var.
1		3	Clonmel	78.1	19.7%
2		2	Accord	66.0	9.3%
3		6	Pinewood	51.7	25.7%
4		1	Teva	49.7	6.5%
5		5	KRKA	42.5	17.5%

# 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 May 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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