health market research

Market Watch Ireland

June 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.

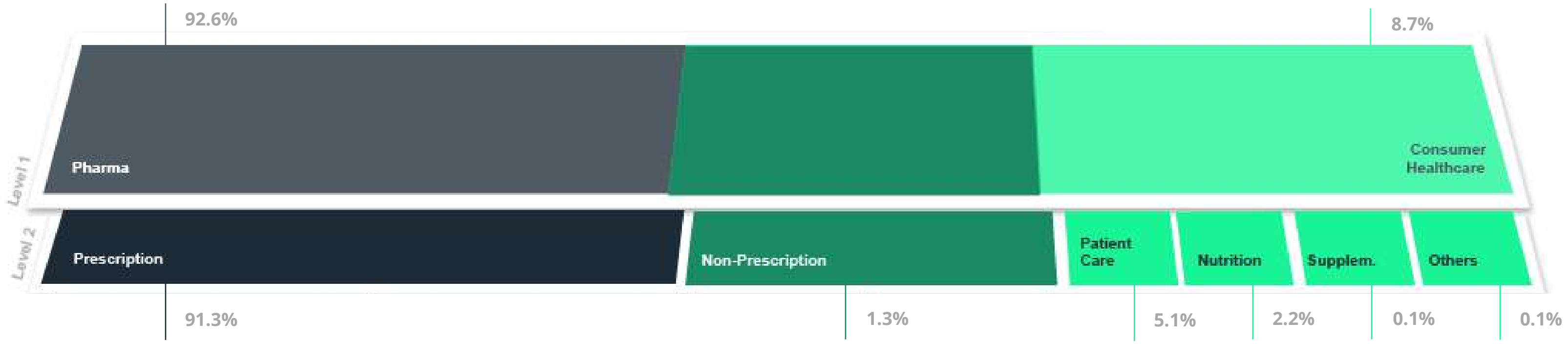
Because we believe that the power of knowledge grows when it is shared. And can change lives.

MARKET WATCH IRELAND – June 2022 – PHARMA MARKET

Total Market

Dynamics of the Pharmacy Channel

June 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	June 2022						MAT June 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**214.6 €**	**100.0%**	6.5%	**11.4**	**100.0%**	5.9%	**2,494.9 €**	**100.0%**	9.5%	**133.2**	**100.0%**	5.7%
Pharma Market	**198.6 €**	**92.6%**	6.4%	**9.1**	**80.0%**	6.9%	**2311.4**	**92.6%**	9.9%	**106.4**	**79.9%**	6.9%
Consumer Healthcare	**18.7 €**	**8.7%**	7.0%	**2.7**	**23.8%**	2.1%	**215.6**	**8.6%**	4.4%	**31.8**	**23.9%**	1.2%
Prescription Medicines	195.9 €	91.3%	6.5%	8.7	76.2%	7.2%	2,279.3 €	91.4%	10.1%	101.4	76.1%	7.2%
Branded	177.1 €	82.5%	6.2%	5.5	48.1%	6.6%	2,064.6 €	82.8%	10.2%	64.1	48.1%	6.5%
Generic	18.8 €	8.8%	9.4%	3.2	28.1%	8.3%	214.7 €	8.6%	8.9%	37.3	28.0%	8.6%
Non Prescription (OTC)	2.7 €	1.3%	2.8%	0.4	3.7%	1.8%	32.0 €	1.3%	3.1%	5.0	3.8%	1.2%
Branded	2.5 €	1.2%	2.7%	0.4	3.3%	1.8%	29.4 €	1.2%	2.5%	4.5	3.3%	0.8%
Generic	0.2 €	0.1%	3.4%	0.05	0.4%	1.4%	2.6 €	0.1%	9.6%	0.5	0.4%	5.0%
Nutrition	4.7 €	2.2%	1.6%	1.7	15.1%	1.8%	54.7 €	2.2%	1.2%	20.2	15.1%	1.8%
Patient Care	10.9 €	5.1%	10.7%	0.5	4.6%	3.5%	123.0 €	4.9%	6.7%	6.2	4.7%	-0.3%
Supplements	0.2 €	0.1%	-1.6%	0.02	0.2%	-3.6%	2.8 €	0.1%	-0.8%	0.2	0.2%	-2.1%
Others	0.2 €	0.1%	21.3%	0.01	0.1%	-4.3%	3.1 €	0.1%	-4.4%	0.2	0.1%	-7.3%

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The dispensary retail market in June 2022 increased by +6.5% in value and +5.9% 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 previous months.

The moving annual total (MAT) analysis shows that the market is growing at +9.9% in value and +6.9% in units while the Consumer Market is growing +4.4% in value and +1.2% in units.

Branded POM consolidates its position as the main market driver with a MAT value growth of +10.2%, but in June Generics showed a higher growth in value than Branded with +9.4% and +6.2%, respectively.

The Consumer Market currently represents 8.7% of the total dispensary market value, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 5.1% and 2.2% respectively.

The highest market share in the Consumer Market continues to belong to the Patient Care segment with €10.9m (5.1%) for the month of June and €123.0m (4.9%) for the MAT period.

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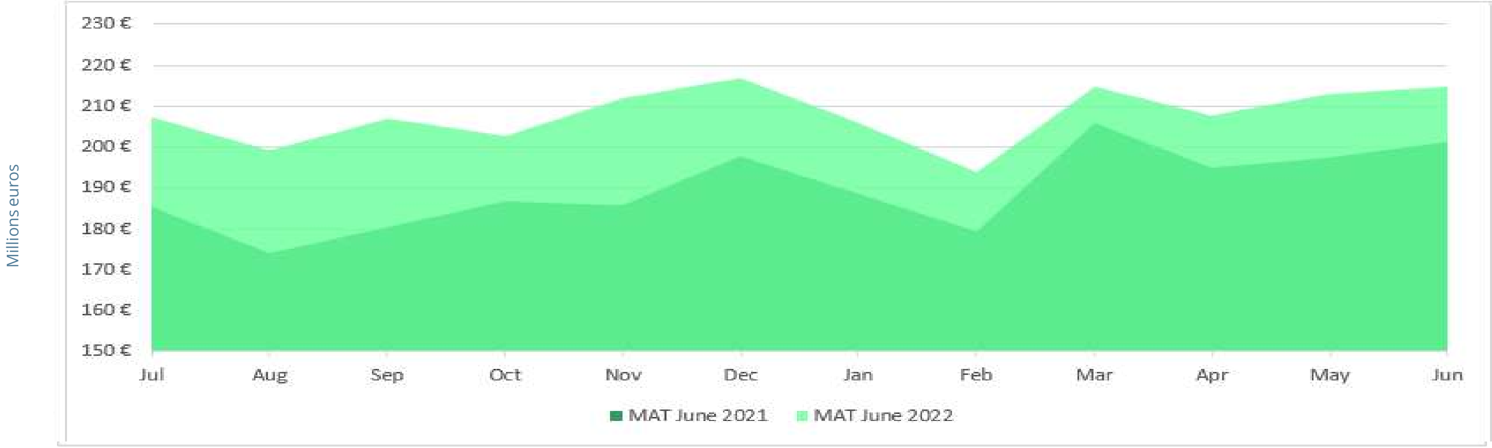
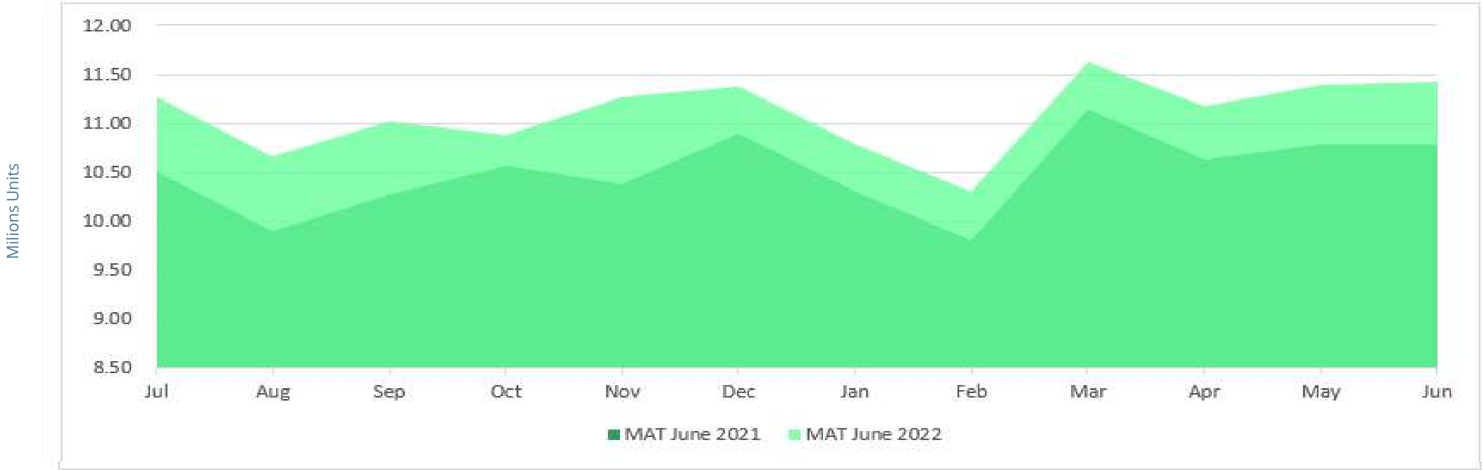
Total Market

Monthly Evolution in Value
June 2021 – June 2022



Monthly Evolution in Units
June 2021 – June 2022



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

In June 2022, an increase of +0.8% in terms of value and +0.2% in units dispensed was observed when compared to the previous month of May 2022.

Published on 11th July 2022

Pharma Market

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Highest Absolute Variations in Value | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	1	R07B - Cystic fibrosis products	3.3	17.5%
2	5	L04C - Interleukin inhibitors	1.7	23.5%
3	11	A10S - GLP-1 agonist antidiabetics	1.1	46.5%
4	8	L02B - Cytostatic hormone antagonists	0.8	17.5%
5	20	T03A - Diagnostic equipment and accessories	0.8	48.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.6	51.8%
2	1	Kalydeco	1.7	15.7%
3	3	Amgevita	1.2	28.6%
4	11	Ozempic	1.2	84.4%
5	4	Stelara	0.9	19.8%

Highest Absolute Variations in Units | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	18	J01C - Broad spectrum penicillins	47.7	62.0%
2	1	C10A - Cholesterol and triglyceride regulating preparations	44.3	7.3%
3	3	N06A - Anti-depressants and mood stabilisers	35.5	6.5%
4	39	G03C - Oestrogens excluding G3A G3E G3F	30.7	94.7%
5	2	A02B - Antiulcerants	26.4	4.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Ensure	34.3	9.4%
2	1	Fortisip	23.9	4.2%
3	36	Augmentin	19.2	63.0%
4	16	Paracetamol Acc.	18.2	29.6%
5	83	Evorel	16.8	181.7%

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 +€3.3m (+17.5%) 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 (+51.8%) for Kaftrio® and +€1.7m (+15.7%) for Kalydeco® that keeps the number one position in the brand rank value.

The Interleukin inhibitors L04C class ranks in second place for the highest variation with a positive contribution of +€1.7m (+23.5%). With growth on the four brands of this market: Cosentix@, Stelara@, Dupixent@ and Skyrizi@.

The GLP1 on the A10S class rank third place for the highest variation with a positive contribution of +€1.1m (+46.5%). Ozempic@ is driving the class growth with +€1.2m (+84.4%) increasing more than the own class.

In terms of highest absolute variations in units, the ranking kept the same leader with Broad spectrum penicillins class J01C growing by +47.7 Thousand units (+62.0%). 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 +35.5 Thousand units (+6.5%). In the Top 5 of brands with the second highest absolute variation in units is Fortisip with a variation of +23.9 Thousand units (+4.2%).

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%). In this space Atorvastatin and Rosuvastatin continue to lead the units dispensed.

Pharma Market | High-Tech

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Highest Absolute Variations in Value | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	4	L04C - Interleukin inhibitors	3.7	76.1%
2	1	R07B - Cystic fibrosis products	3.3	17.5%
3	6	L02B - Cytostatic hormone antagonists	1.3	38.0%
4	10	D05B - Systemic antipsoriasis products	0.7	43.4%
5	3	L01H - Protein kinase inhibitor antineoplastics	0.6	5.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Kaftrio	2.6	51.8%
2	1	Kalydeco	1.7	15.7%
3	3	Amgevita	1.2	28.6%
4	4	Stelara	0.9	19.8%
5	17	Xtandi	0.7	108.5%

Highest Absolute Variations in Units | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	5	L04C - Interleukin inhibitors	2.7	140.4%
2	1	L04B - Anti-TNF products	2.5	11.8%
3	22	N02C - Anti-migraine preparations	0.9	-
4	26	A02B - Antiulcerants	0.7	-
5	30	A07E - Inflammatory bowel disorder products	0.6	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	1	Amgevita	2.4	40.4%
2	41	Pedippi	0.7	-
3	46	Ajovy	0.6	-
4	51	Entyvio	0.6	-
5	8	Aranesp	0.5	17.9%

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

The Cytostatic Hormone Antagonists of the L02B class are ranking third in the highest variation in value with Zytiga@ and Xtandi@ on the top positions but with Erleada@ and now Nubeqa@ starting to gain space.

The Anti-TNF products of the L04B class ranks now second in the highest variation in units with +2.5 Thousand units (11.8%). With Amgevita@, from Amgen, ranking first in the units rank and the units rank with the highest variation.

The A07E Inflammatory bowel disorder product, Entyvio@, from Takeda, is now ranking fourth in units absolute variation with +0.6 Thousand units. Two other products with less then a year have a space in the top 5: Pedippi and Ajovy.

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var.
1	5	A10S - GLP-1 agonist antidiabetics	1.1	46.5%
2	11	T03A - Diagnostic equipment and accessories	0.8	48.1%
3	2	B01F - Direct factor Xa inhibitors	0.6	9.8%
4	13	A10P - SGLT2 inhibitor antidiabetics	0.6	35.1%
5	28	G03D - Progestogens excluding G3A G3F	0.3	46.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	2	Ozempic	1.16	84.4%
2	5	Dexcom	0.56	64.6%
3	1	Eliquis	0.52	14.2%
4	10	Forxiga	0.35	59.9%
5	7	Medtronic	0.32	33.8%

Highest Absolute Variations in Units | June 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	19	J01C - Broad spectrum penicillins	47.7	62.0%
2	2	C10A - Cholesterol and triglyceride regulating preparations	44.3	7.3%
3	4	N06A - Anti-depressants and mood stabilisers	35.5	6.5%
4	40	G03C - Oestrogens excluding G3A G3E G3F	30.7	94.7%
5	3	A02B - Antiulcerants	25.7	4.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	2	Ensure	34.3	9.4%
2	1	Fortisip	23.9	4.2%
3	36	Augmentin	19.2	63.0%
4	16	Paracetamol Accord	18.2	29.6%
5	83	Evorel	16.8	181.7%

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 +€1.1m (+46.5%) with Ozempic® observing a growth of +€1.16m (+84.4%) in relation to June 2021. The A10P SGLT2 inhibitors class increased by +0.6 M€ (35.1%), continuing to benefit from the positive impact of the extension of therapeutic indications of products within this class (such as Heart Failure and Chronic kidney disease). Forxiga® stepped up with a growth of +€0.32m (+33.8%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +€0.6m (+9.82%). Within this class, Eliquis® is in the top position of the brand rank value and on the third position of the brands highest value variation a growth of +€0.52m (+14.2%) 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 same top 5 at both ATC Classes and Brand level.

Pharma Market | Generic

Highest Absolute Variations in Value | June 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var.
1	4	Lenalidomide	0.64	-
2	15	Amoxicillin	0.16	94.8%
3	26	Posaconazole	0.09	87.9%
4	32	Dutasteride + Tamsulosin	0.09	101.8%
5	21	Ondansetron	0.07	39.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var.
1	7	Lenalidomide Accord	0.26	-
2	10	Lenalidomide Rowex	0.22	-
3	15	Pinamox	0.11	115.9%
4	58	Lenalidomide Clonmel	0.08	-
5	26	Posaconazole Accord	0.08	108.2%

Highest Absolute Variations in Units | June 2022

INN's

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var.
1	1	Atorvastatin	27.8	9.0%
2	20	Amoxicillin	20.7	111.5%
3	11	Paracetamol	18.8	28.9%
4	3	Rosuvastatin	16.1	9.3%
5	6	Sertraline	15.4	16.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var.
1	5	Paracetamol Accord	18.2	29.6%
2	4	Atorvastatin Accord	14.2	21.5%
3	41	Doxycycline Pinewood	12.8	208.2%
4	33	Pinamox	12.7	128.5%
5	11	Lercanidipine Clonmel	11.9	27.9%

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Within the top 5 INNs with highest absolute variation in value Lenalidomide, used to treat adults with multiple myeloma, is now the clear leader with a growth of +€0.64m.

With the highest variation in units Atorvastation continues to lead followed by Amoxicilin.

Top 5 Companies | By Sell-Out Value

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Highest Absolute Variations in Value | June 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs.	Var.
1	1	Vertex	3.28	17.5%
2	2	Janssen	1.94	15.4%
3	10	Novo Nordisk	1.19	26.2%
4	4	Amgen	1.06	11.3%
5	3	Novartis	0.85	7.2%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs.	Var.
1	3	Novo Nordisk	1.13	26.0%
2	23	DexCom	0.56	64.6%
3	7	Bristol Myers Squibb	0.52	14.5%
4	5	Clonmel	0.36	9.4%
5	27	Medtronic	0.32	33.8%

Highest Absolute Variations in Value | June 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var.
1	1	Vertex	3.28	17.5%
2	3	Novartis	2.82	39.1%
3	2	Janssen	1.95	17.2%
4	4	Amgen	0.92	12.5%
5	10	Astellas	0.70	44.6%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs.	Var.
1	1	Accord	0.46	11.3%
2	3	Clonmel	0.36	16.2%
3	4	Rowa	0.33	19.9%
4	2	Teva	0.25	5.8%
5	6	Pinewood	0.23	16.5%

The 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 Novartis.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +€1.13m (+26.0%) growth when compared to June 2021, with Ozempic@ driving a significative growth.

Among the Generic Market Accord stepped ahead of competition again leading the rank value and the rank value with the highest absolute variation with +€0.46m (+11.3%).

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Top 5 Companies | By Sell-Out Units

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Highest Absolute Variations in Units | June 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	84.8	9.5%
2	1	Teva	58.7	6.0%
3	3	Accord	53.8	5.9%
4	12	Pinewood	49.4	23.1%
5	10	KRKA	44.3	12.5%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	2	Clonmel	84.6	9.5%
2	1	Teva	58.0	5.9%
3	3	Accord	52.7	5.8%
4	12	Pinewood	49.4	23.1%
5	10	KRKA	44.3	12.5%

Highest Absolute Variations in Units | June 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	1	Amgen	2.71	18.0%
2	3	Novartis	2.65	43.9%
3	10	Accord	1.19	43.7%
4	8	Janssen	1.07	26.2%
5	11	Teva	0.74	30.3%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var.
1	3	Clonmel	71.0	17.4%
2	1	Teva	56.2	7.4%
3	2	Accord	47.6	6.6%
4	6	Pinewood	46.7	22.7%
5	5	KRKA	37.5	15.2%

In the 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 +2.71 Thousand units (+18.0%) closely followed by Novartis with an absolute variation of +2.65 Thousand units (+43.9%).

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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 June 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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