Market Watch Ireland

July 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.

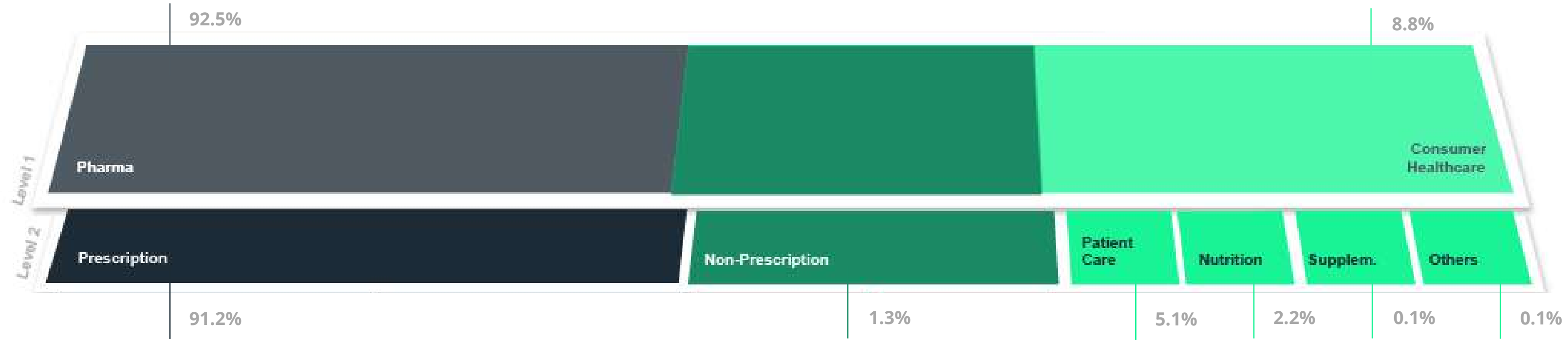
Because we believe that the power of knowledge grows when it is shared. And can change lives.

MARKET WATCH IRELAND – July 2022 – PHARMA MARKET

Total Market

Dynamics of the Pharmacy Channel

July 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	July 2022						MAT July 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**210.9 €**	**100.0%**	**1.7%**	**11.3**	**100.0%**	**0.3%**	**2,498.4 €**	**100.0%**	**8.6%**	**133.2**	**100.0%**	**5.1%**
Pharma Market	**195.0 €**	**92.5%**	1.7%	**9.0**	**79.6%**	1.1%	**2314.6**	**92.6%**	9.0%	**106.5**	**80.0%**	6.3%
Consumer Healthcare	**18.6 €**	**8.8%**	1.1%	**2.7**	**24.1%**	-2.3%	**215.8**	**8.6%**	4.0%	**31.7**	**23.8%**	0.5%
Prescription Medicines	192.3 €	91.2%	1.7%	8.6	75.9%	1.2%	2,282.6 €	91.4%	9.1%	101.5	76.2%	6.6%
Branded	173.4 €	82.2%	1.4%	5.4	47.7%	0.4%	2,067.0 €	82.7%	9.2%	64.1	48.1%	5.9%
Generic	18.8 €	8.9%	5.0%	3.2	28.2%	2.7%	215.6 €	8.6%	8.2%	37.4	28.1%	7.9%
Non Prescription (OTC)	2.7 €	1.3%	-0.3%	0.4	3.7%	-2.3%	32.0 €	1.3%	2.7%	5.0	3.7%	0.7%
Branded	2.5 €	1.2%	-0.2%	0.4	3.3%	-2.1%	29.4 €	1.2%	2.3%	4.5	3.3%	0.5%
Generic	0.2 €	0.1%	-0.9%	0.04	0.4%	-3.6%	2.6 €	0.1%	7.2%	0.5	0.4%	2.8%
Nutrition	4.7 €	2.2%	-2.6%	1.7	15.4%	-2.3%	54.6 €	2.2%	0.4%	20.1	15.1%	0.9%
Patient Care	10.7 €	5.1%	3.1%	0.5	4.7%	-2.6%	123.3 €	4.9%	6.3%	6.2	4.7%	-0.6%
Supplements	0.2 €	0.1%	-5.2%	0.02	0.2%	-3.1%	2.8 €	0.1%	-0.9%	0.2	0.2%	-2.1%
Others	0.2 €	0.1%	9.1%	0.01	0.1%	-3.1%	3.1 €	0.1%	-3.4%	0.2	0.1%	-6.6%

The dispensary retail market in July 2022 increased by +1.7% in value and +0.3% in units, when compared to the same period of the previous year.

The Pharma Market currently represents 92.5% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.2% and 1.3% respectively. Values that are aligned with previous months.

The moving annual total (MAT) analysis shows that the market is growing at +8.6% in value and +5.1% in units while the Consumer Market is growing +4.0% in value and +0.5% in units.

Branded POM consolidates its position as the main market driver with a MAT value growth of +9.2%, with Generics showing a value growth in value of +8.2%.

The Consumer Market currently represents 8.8% 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 €10.7m (5.1%) for the month of July and €123.3m (4.9%) for the MAT period.

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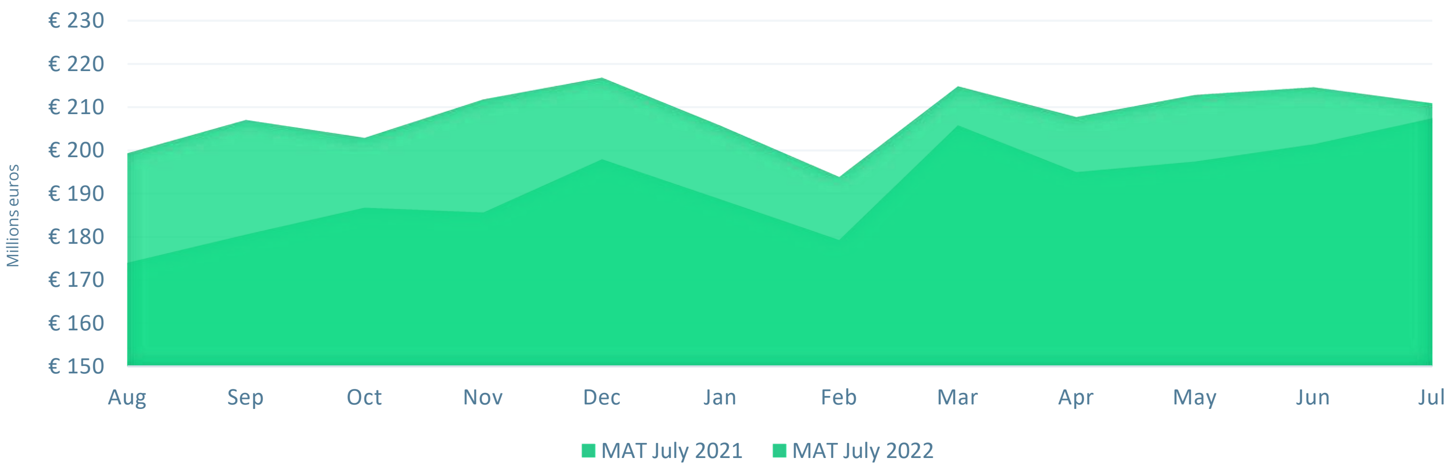
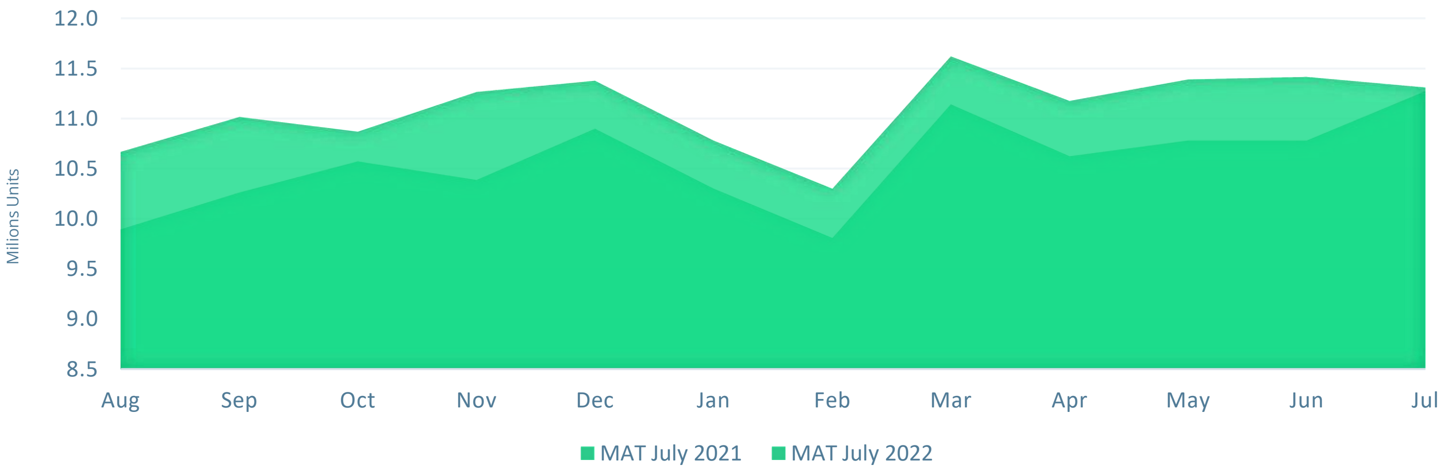
Total Market

Monthly Evolution in Value
July 2021 – July 2022



Monthly Evolution in Units
July 2021 – July 2022



July 2022 had a decrease of -1.75% in terms of value and -0.93% in units dispensed when compared to the previous month of June 2022.

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

Pharma Market

health market research

Highest Absolute Variations in Value | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	3.0	16.6%
2	5	L04C - Interleukin inhibitors	1.4	19.8%
3	10	A10S - GLP-1 agonist antidiabetics	1.1	42.8%
4	7	L02B - Cytostatic hormone antagonists	1.1	24.0%
5	20	T03A - Diagnostic equipment and accessor.	0.7	36.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.7	53.9%
2	1	Kalydeco	1.5	13.5%
3	9	Ozempic	1.2	79.8%
4	7	Zytiga	0.9	38.9%
5	3	Amgevita	0.8	18.3%

Highest Absolute Variations in Units | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	37	G03C - Oestrogens excluding G3A G3E G3F	28.1	78.8%
2	27	J01C - Broad spectrum penicillins	20.2	24.9%
3	1	C10A - Cholesterol and triglyceride reg prep	17.1	2.7%
4	56	G03D - Progestogens excluding G3A G3F	16.9	76.2%
5	45	A10P - SGLT2 inhibitor antidiabetics	11.8	29.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	19.1	3.2%
2	78	Evorel	17.2	158.3%
3	91	Utrogestan	15.7	173.4%
4	39	Augmentin	14.4	44.9%
5	75	Nutricrem	13.9	96.1%

Of the Top 5 ATC classes with highest absolute variations in value the Cystic Fibrosis R07B class maintains leadership of the rank with +€3.0m (+16.6%) 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 +€2.7m (+53.9%) for Kaftrio® and +€1.5m (+13.5%) 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 absolute variation in value with a positive contribution of +€1.4m (+19.8%). With four contributing brands on this class: 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 (+42.8%). Ozempic@ is driving the class growth with +€1.2m (+79.8%) with a higher growth than the class.

In terms of highest absolute variations in units, the Oestrogens in the G03C class are now at the top with +28.1 Thousand Units (+78.8%) mainly driven by Estradot@, Evorel@ and Oestrogel@. The Broad spectrum penicillins class J01C stepped down to second position growing by +20.2 Thousand units (+24.9%). The Anti-depressants and mood stabilisers from the N06A class lost the position on the top 5 absolute variation rank in units. In the brands Top 5 Fortisip@ holds the first position with the highest absolute variation in units with +19.1 Thousand units (+3.2%).

The Class C10A Cholesterol and triglyceride regulation preparations also kept a position in the top ATC ranking with an absolute variation of +17.1 Thousand units (+2.7%). In this space Atorvastatin and Rosuvastatin continue to lead the units dispensed.

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Pharma Market | High Tech

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Highest Absolute Variations in Value | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	L04C - Interleukin inhibitors	3.6	72.9%
2	1	R07B - Cystic fibrosis products	3.0	16.6%
3	6	L02B - Cytostatic hormone antagonists	1.8	52.7%
4	10	D05B - Systemic antipsoriasis products	0.6	35.9%
5	25	N02C - Anti-migraine preparations	0.4	-

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.7	53.9%
2	1	Kalydeco	1.5	13.5%
3	6	Zytiga	0.9	38.9%
4	14	Xtandi	0.8	123.4%
5	3	Amgevita	0.8	18.3%

Highest Absolute Variations in Units | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	4	L04C - Interleukin inhibitors	2.7	136.4%
2	1	L04B - Anti-TNF products	1.3	6.0%
3	22	N02C - Anti-migraine preparations	0.9	-
4	25	A02B - Antiulcerants	0.6	-
5	29	A07E - Inflammatory bowel disorder prods.	0.6	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Amgevita	1.8	29.0%
2	29	Pergoveris	0.7	277.0%
3	43	Pedippi	0.6	-
4	44	Ajovy	0.6	-
5	46	Entyvio	0.6	-

The High Tech Market leads the overall Pharma Market in terms of absolute value variation, with similar 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 hold second position in the highest absolute variation in units with +1.3 Thousand units (6.0%). 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 fifth 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.

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Pharma Market | Excluding High Tech

health market research

Highest Absolute Variations in Value | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	A10S - GLP-1 agonist antidiabetics	1.1	42.8%
2	10	T03A - Diagnostic equipment and access.	0.7	36.0%
3	12	A10P - SGLT2 inhibitor antidiabetics	0.5	28.6%
4	2	B01F - Direct factor Xa inhibitors	0.4	5.5%
5	28	G03D - Progestogens excluding G3A G3F	0.3	37.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Ozempic	1.19	79.8%
2	5	Dexcom	0.57	61.3%
3	1	Eliquis	0.36	9.2%
4	10	Forxiga	0.32	50.3%
5	47	Utrogestan	0.25	169.6%

Highest Absolute Variations in Units | July 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	38	G03C - Oestrogens excluding G3A G3E G3F	28.1	78.8%
2	28	J01C - Broad spectrum penicillins	20.2	24.9%
3	2	C10A - Cholesterol and triglyceride reg prep	17.1	2.7%
4	57	G03D - Progestogens excluding G3A G3F	16.9	76.2%
5	46	A10P - SGLT2 inhibitor antidiabetics	11.8	29.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	19.1	3.2%
2	78	Evorel	17.2	158.3%
3	91	Utrogestan	15.7	173.4%
4	39	Augmentin	14.4	44.9%
5	75	Nutricrem	13.9	96.1%

When analysing the Pharma Market excluding the medicines reimbursement under the High Tech Scheme arrangements, the antidiabetic classes, A10S and A10P hold first and third position in the absolute value variation rankings. The Class A10S GLP-1 agonists presents a variation of +€1.1m (+42.8%) with Ozempic® observing a growth of +€1.19m (+79.8%) in relation to July 2021. The A10P SGLT2 inhibitors class increased by +0.5 M€ (28.6%), 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) with Forxiga® showing a growth of +€0.32m (+50.3%).

The Direct factor Xa inhibitors B01F Class holds third place with a growth of +€0.4m (+5.5%). Within this class, Eliquis® is on the top position of the brand rank value and on the third position of the brands highest value variation with a growth of +€0.36m (+9.2%) 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 variation in units, with the two rankings having similar top players at both ATC Classes and Brand levels.

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Pharma Market | Generic

Highest Absolute Variations in Value | July 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var. %
1	3	Lenalidomide	0.75	-
2	23	Posaconazole	0.14	128.1%
3	18	Amoxicillin	0.11	62.1%
4	34	Dutasteride + Tamsulosin	0.08	92.6%
5	38	Azithromycin	0.04	44.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	7	Lenalidomide Rowex	0.27	-
2	8	Lenalidomide Accord	0.25	-
3	18	Posaconazole Accord	0.12	166.4%
4	37	Lenalidomide Teva	0.12	-
5	51	Lenalidomide Clonme	0.10	-

Highest Absolute Variations in Units | July 2022

INN's

rank var abs	rank value	INN	Var. Abs. Th Units	Var. %
1	11	Paracetamol	16.9	21.6%
2	1	Atorvastatin	13.7	4.2%
3	8	Sertraline	10.4	10.7%
4	28	Amoxicillin	10.2	51.6%
5	43	Dutasteride + Tamsulosin	9.8	117.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	22	Rosuvastatin Clonmel	10.5	42.7%
2	66	Rowalief	9.5	366.8%
3	11	Lercanidipine Clonme	9.1	20.2%
4	4	Paracetamol Accord	7.7	10.2%
5	16	Bisoprolol Accord	7.4	20.6%

Within the top 5 INNs with highest absolute variation in value Lenalidomide, used to treat adults with multiple myeloma, continued as the clear leader with a growth of +€0.75m.

With the highest variation in units Atorvastation is now second in the absolute variation rank but holds first position of the rank.

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MARKET WATCH IRELAND – July 2022 – PHARMA MARKET

Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | July 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	3.02	16.6%
2	2	Janssen	1.73	13.7%
3	10	Novo Nordisk	0.99	20.3%
4	3	Novartis	0.74	6.2%
5	12	AstraZeneca	0.58	13.1%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	3	Novo Nordisk	0.99	21.2%
2	23	DexCom	0.57	61.3%
3	5	Bristol Myers Squibb	0.36	9.5%
4	42	Consilient Health	0.19	39.6%
5	33	Phoenix Labs	0.13	15.1%

Highest Absolute Variations in Value | July 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	3.02	16.6%
2	3	Novartis	2.96	40.7%
3	2	Janssen	1.83	16.3%
4	10	Astellas	0.85	53.5%
5	13	AstraZeneca	0.56	39.3%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Accord	0.33	7.8%
2	3	Clonmel	0.27	11.3%
3	4	Rowa	0.22	12.4%
4	6	Pinewood	0.09	6.3%
5	5	KRKA	0.07	4.4%

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, Novartis 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 +€0.99m (+21.2%) growth when compared to July 2021, with Ozempic@ as a strong contributor to the growth and Saxenda@ starting to ramp up..

Among the Generic Market Accord kept the leading position ahead of competition both on the rank value and the rank value with the highest absolute variation with +€0.33m (+7.8%).

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Top 5 Companies | By Sell-Out Units

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Highest Absolute Variations in Units | July 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	13	ULM All Manufacturers	33.4	24.8%
2	3	Clonmel	32.8	3.5%
3	12	Pinewood	28.3	12.6%
4	10	KRKA	27.1	7.2%
5	26	Consilient Health	22.1	28.5%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	13	ULM All Manufacturers	33.4	24.8%
2	3	Clonmel	32.5	3.5%
3	12	Pinewood	28.3	12.6%
4	10	KRKA	27.1	7.2%
5	26	Consilient Health	22.1	28.5%

Highest Absolute Variations in Units | July 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	4	Novartis	2.34	37.5%
2	1	Amgen	2.23	14.6%
3	10	Accord	1.04	34.5%
4	9	Janssen	0.74	20.0%
5	11	Teva	0.70	29.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	3	Clonmel	47.7	11.0%
2	6	Pinewood	27.8	12.9%
3	5	KRKA	20.3	7.7%
4	1	Teva	15.3	1.9%
5	2	Accord	8.0	1.0%

The group of companies with Exempt Medicinal Products (Unlicensed Medicines) arrangements stepped directly to the first position of the highest absolute variation in units of both the pharma market and the pharma market excluding the High Tech medicines with +33.4 Thousand units (+24.8%). In the Pharma Market and the Pharma Market Excluding the High-Tech, the same five companies share a similar ranking of highest absolute variation. Consilient Health is now ranking fifth on both rankings, +€22.1m (+28.5%), with a significative contribute from Evorel@.

In the High Tech Market Novartis stepped up to the leadership with an absolute variation of +2.34 Thousand units (+37.5%) closely followed by Amgen with an absolute variation of +2.23 Thousand units (+14.6%).

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HMR

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 January 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).

HMR health market research

Knowledge for better health