Market Watch Ireland

August 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 analyse the market.

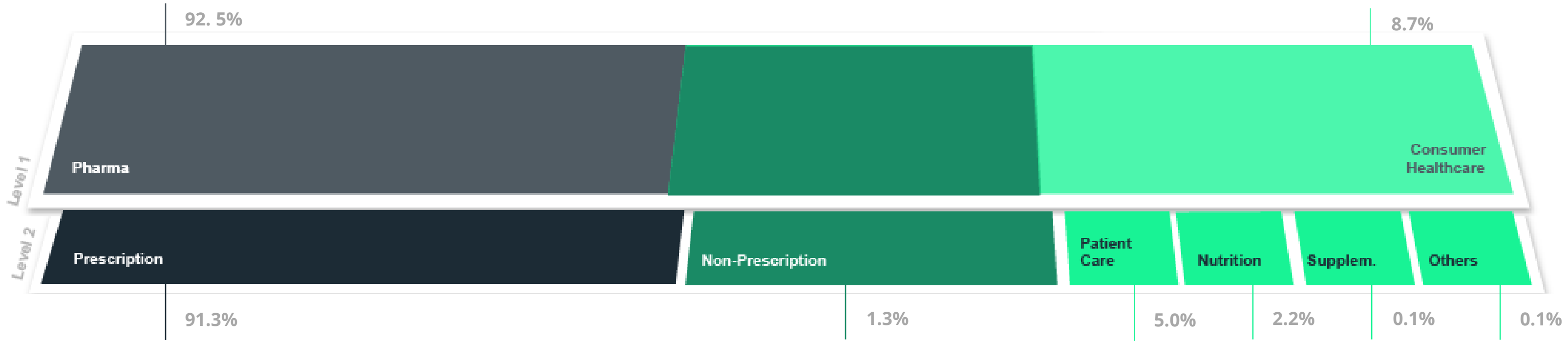
Because we believe that the power of knowledge grows when it is shared. And can change lives.

MARKET WATCH IRELAND – August 2022 – PHARMA MARKET

Total Market

Dynamics of the Pharmacy Channel

August 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	August 2022						MAT August 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**219.0 €**	**100.0%**	**9.9%**	**11.6**	**100.0%**	**8.6%**	**2,518.0 €**	**100.0%**	**8.3%**	**134.1**	**100.0%**	**5.2%**
Pharma Market	**202.6 €**	**92.5%**	9.9%	**9.2**	**79.4%**	9.0%	**2333.0**	**92.7%**	8.6%	**107.3**	**80.0%**	6.4%
Consumer Healthcare	**19.1 €**	**8.7%**	8.8%	**2.8**	**24.3%**	6.9%	**217.3**	**8.6%**	4.2%	**31.9**	**23.8%**	0.7%
Prescription Medicines	199.8 €	91.3%	10.0%	8.8	75.7%	9.2%	2,300.7 €	91.4%	8.7%	102.2	76.2%	6.7%
Branded	180.4 €	82.4%	9.6%	5.5	47.5%	8.4%	2,082.8 €	82.7%	8.8%	64.5	48.1%	6.0%
Generic	19.4 €	8.9%	13.2%	3.3	28.2%	10.6%	217.9 €	8.7%	8.3%	37.7	28.1%	7.8%
Non Prescription (OTC)	2.8 €	1.3%	8.2%	0.4	3.7%	6.2%	32.2 €	1.3%	2.9%	5.0	3.7%	0.9%
Branded	2.6 €	1.2%	8.2%	0.4	3.3%	6.3%	29.6 €	1.2%	2.6%	4.5	3.3%	0.7%
Generic	0.2 €	0.1%	8.1%	0.05	0.4%	4.8%	2.7 €	0.1%	6.6%	0.5	0.4%	2.2%
Nutrition	4.9 €	2.2%	7.1%	1.8	15.7%	8.0%	54.9 €	2.2%	0.5%	20.3	15.1%	1.1%
Patient Care	10.9 €	5.0%	10.2%	0.5	4.6%	4.0%	124.3 €	4.9%	6.5%	6.2	4.6%	-0.4%
Supplements	0.2 €	0.1%	0.4%	0.02	0.2%	1.9%	2.8 €	0.1%	-0.9%	0.2	0.2%	-1.9%
Others	0.3 €	0.1%	-0.5%	0.01	0.1%	2.6%	3.1 €	0.1%	-3.8%	0.2	0.1%	-6.1%

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In August 2022 the dispensary retail market increased by +9.9% in value and +8.6% in units, when compared to the same period of the previous year.

The Pharma Market represented 92.5% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.3% and 1.3% respectively. Figures that are aligned with previous months.

In the moving annual total (MAT) analysis the market is growing at +8.3% in value and +5.2% in units.

Branded POM consolidated its position as the main market driver in value with a MAT growth of +8.8%, where Generics are showing a value growth of +8.3%.

The Consumer Market currently represents 8.6% of the total MAT dispensary market share 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 €10.9m (+7.1%) for the month of August and €124.3m (+4.9%) for the MAT period.

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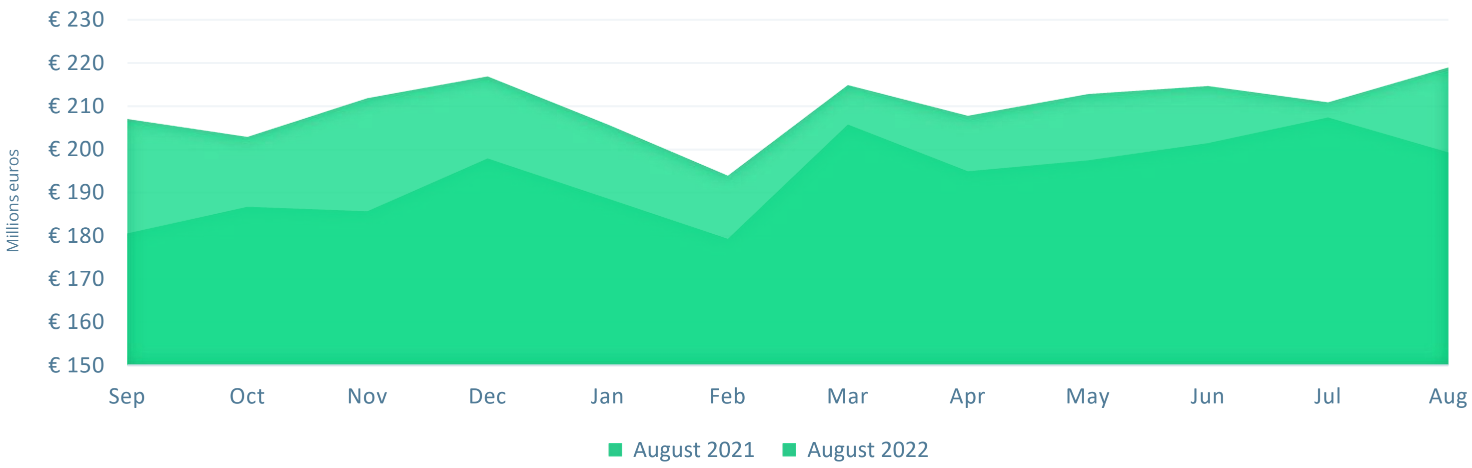
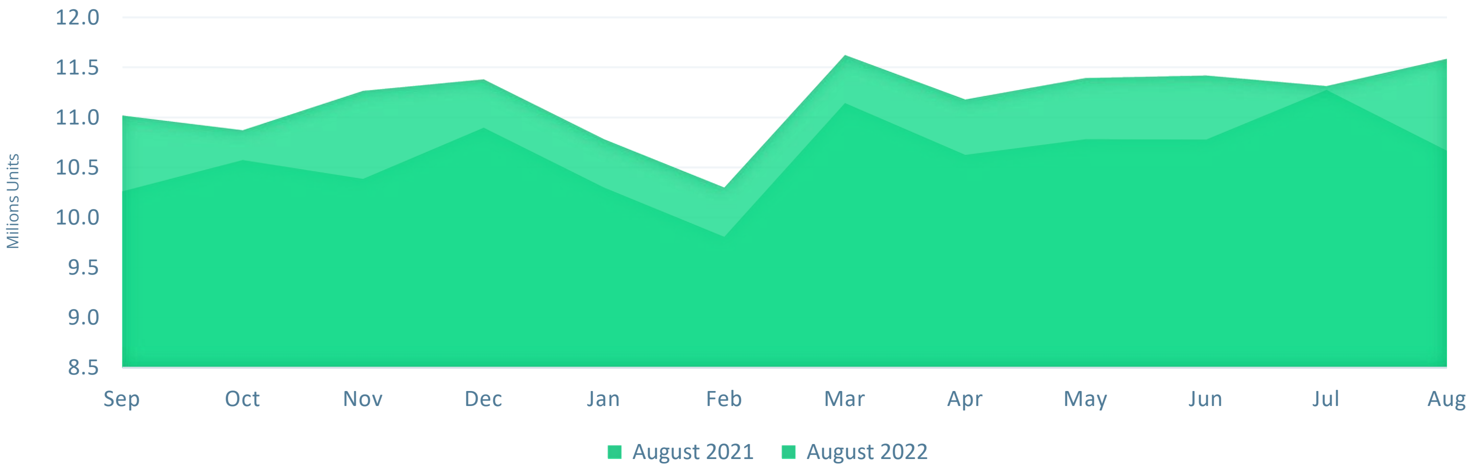
Total Market

Monthly Evolution in Value
August 2021 – August 2022



Monthly Evolution in Units
August 2021 – August 2022



August 2022, when compared to the previous year, has returned to the similar gap level that it was having before July. Compared to the previous month of July 2022, August showed a growth of 3.8% in terms of value and 2.4% in units dispensed.

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

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Pharma Market

health market research

Highest Absolute Variations in Value | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	4.8	26.7%
2	7	L02B - Cytostatic hormone antagonists	1.6	33.4%
3	10	A10S - GLP-1 agonist antidiabetics	1.4	55.1%
4	5	L04C - Interleukin inhibitors	1.4	18.6%
5	2	L04B - Anti-TNF products	1.0	5.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	3.4	66.8%
2	1	Kalydeco	2.8	27.6%
3	9	Ozempic	1.4	93.0%
4	3	Amgevita	1.1	25.9%
5	7	Zytiga	1.0	42.6%

Highest Absolute Variations in Units | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	C10A - Cholesterol and triglyceride regulating preparations	65.7	10.8%
2	3	N06A - Anti-depressants and mood stabilisers	50.2	9.2%
3	2	A02B - Antiulcerants	45.2	8.0%
4	4	N02B - Non-narcotics and anti-pyretics	34.3	9.2%
5	34	G03C - Oestrogens excluding G3A G3E G3F	33.5	92.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	91.7	16.4%
2	2	Ensure	23.4	6.4%
3	58	Nutricrem	21.9	161.7%
4	90	Utrogestan	16.8	175.9%
5	3	Eltroxin	16.3	5.2%

The Top 5 ATC classes and the Top 5 Brands with highest absolute variations in value added up to +€10.2m and +€9.7m, respectively. Comparing these values to the +€19.3m total market value growth in August 2022 vs August 2021 we see that both Top 5 ATC classes and Top 5 Brands on their own account for more than half of the market value growth.

Of the Top 5 ATC classes with highest absolute variations in value the Cystic Fibrosis R07B class maintains leadership of the rank with +€4.8m (+26.7%) 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 +€3.4m (+66.8%) for Kaftrio® and +€2.8m (+27.6%) for Kalydeco® that keeps the number one position in the brand rank value.

The GLP1 on the A10S class rank third place for the highest variation, with a positive contribution of +€1.4m (+55.1%). Ozempic@ is driving the class growth with a similar growth of +€1.4m (+93.0%).

The market value growth in units is not as concentrated in the Top 5 ATC classes and the Top 5 Brands as in the value analysis. With the Top 5 ATC classes holding 30.0% and the Top 5 Brands representing 22.3% of the +763.3 Thousand units of the total market units growth in August 2022 vs August 2021.

In terms of highest absolute variations in units, the Oestrogens in the G03C class are now in the top with +33.5 Thousand Units (+92.4%) mainly driven by Estradot@, Evorel@ and Oestrogel@. The Broad spectrum penicillins class J01C stepped out of the top 5 growth rank this month. In the brands Top 5 Fortisip@ holds the first position with the highest absolute variation in units with +91.7 Thousand units (+16.4%).

The Class C10A Cholesterol and triglyceride regulation preparations is first in the rank and also first in the highest absolute variation in units rank with +65.7 Thousand units (+10.8%). 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 | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	4.8	26.7%
2	4	L04C - Interleukin inhibitors	3.6	66.1%
3	6	L02B - Cytostatic hormone antagonists	2.3	65.5%
4	2	L04B - Anti-TNF products	1.0	5.5%
5	9	M01C - Specific anti-rheumatic agents	0.8	38.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	3.4	66.8%
2	1	Kalydeco	2.8	27.6%
3	3	Amgevita	1.1	25.9%
4	13	Xtandi	1.0	168.1%
5	6	Zytiga	1.0	42.6%

Highest Absolute Variations in Units | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	L04B - Anti-TNF products	3.2	14.8%
2	5	L04C - Interleukin inhibitors	2.8	129.7%
3	2	L04X - Other immunosuppressants	1.0	6.0%
4	21	N02C - Anti-migraine preparations	1.0	-
5	11	M01C - Specific anti-rheumatic agents	0.8	37.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Amgevita	2.3	37.8%
2	38	Pedippi	0.8	-
3	43	Entyvio	0.7	-
4	20	Roactemra	0.7	81.2%
5	46	Ajovy	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 stepped up to first position in the highest absolute variation in units with +3.2 Thousand units (14.8%). With Amgevita@, from Amgen, ranking first in the units rank and the units rank with the highest variation.

The high-tech M01C Specific anti-rheumatic agents jumped to the value top 5 mainly due to the recovery of @Roactemra from the down peak held in August 2021.

The A07E Inflammatory bowel disorder product, Entyvio@, from Takeda, is now ranking third in units absolute variation with +0.7 Thousand units. Two other products with less then a year have a space in the top 5 the Antiulcerants Pedippi@ and the Anti-migrain Ajovy@.

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Pharma Market | Excluding High Tech

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Highest Absolute Variations in Value | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	A10S - GLP-1 agonist antidiabetics	1.4	55.1%
2	2	B01F - Direct factor Xa inhibitors	0.9	13.6%
3	10	T03A - Diagnostic equipment and accessories	0.8	43.4%
4	12	A10P - SGLT2 inhibitor antidiabetics	0.6	36.8%
5	13	R03L - Anticholinergics in combinations with B2-agonists	0.4	18.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Ozempic	1.38	93.0%
2	1	Eliquis	0.67	17.9%
3	5	Dexcom	0.60	65.4%
4	10	Forxiga	0.39	61.9%
5	46	Utrogestan	0.27	170.5%

Highest Absolute Variations in Units | August 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	2	C10A - Cholesterol and triglyceride regulating preparations	65.6	10.8%
2	4	N06A - Anti-depressants and mood stabilisers	50.2	9.2%
3	3	A02B - Antiulcerants	44.4	7.9%
4	5	N02B - Non-narcotics and anti-pyretics	34.3	9.2%
5	35	G03C - Oestrogens excluding G3A G3E G3F	33.5	92.4%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	91.7	16.4%
2	2	Ensure	23.4	6.4%
3	58	Nutricrem	21.9	161.7%
4	90	Utrogestan	16.8	175.9%
5	3	Eltroxin	16.3	5.2%

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 +€1.4m (+55.1%) with Ozempic® observing a growth of +€1.38m (+93.0%) in relation to August 2021. The A10P SGLT2 inhibitors class increased by +€0.6m (36.8%), 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 +€0.39m (+61.9%) and keeping to increase the gap to the other competitors in the class.

The Direct factor Xa inhibitors B01F Class hold the second position with a growth of +€0.9m (+13.6%). Within this class, Eliquis® is on the top position of the brand rank value and on the second position of the brands highest value variation with a growth of +€0.67m (+17.9%) 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.

Pharma Market | Generic

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Highest Absolute Variations in Value | August 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var. %
1	3	Lenalidomide	0.80	-
2	35	Dutasteride + Tamsulosin	0.10	115.1%
3	27	Posaconazole	0.09	66.6%
4	24	Amoxicillin	0.08	45.8%
5	8	Sertraline	0.07	19.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	5	Lenalidomide Accord	0.33	-
2	12	Lenalidomide Rowex	0.24	-
3	33	Lenalidomide Clonmel	0.13	-
4	52	Lenalidomide Teva	0.10	-
5	23	Posaconazole Accord	0.08	99.9%

Highest Absolute Variations in Units | August 2022

INN's

rank var abs	rank value	INN	Var. Abs. Th Units	Var. %
1	1	Atorvastatin	38.3	12.4%
2	10	Paracetamol	22.5	29.6%
3	3	Rosuvastatin	21.0	12.0%
4	6	Sertraline	18.1	19.4%
5	2	Bisoprolol	17.5	9.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	3	Atorvastatin Accord	15.8	21.8%
2	8	Atorvastatin Pinewoo	12.4	21.3%
3	16	Bisoprolol Accord	12.3	36.0%
4	5	Paracetamol Accord	12.1	16.7%
5	21	Rosuvastatin Clonmel	11.9	46.6%

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 +€0.80m.

With the highest variation in units Atorvastation is now first in the absolute variation rank and also holds first position of the INN units rank.

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Top 5 Companies | By Sell-Out Value

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Highest Absolute Variations in Value | August 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	4.77	26.7%
2	2	Janssen	2.00	15.7%
3	9	Novo Nordisk	1.45	30.7%
4	4	Amgen	1.40	15.0%
5	3	Novartis	1.15	9.7%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	3	Novo Nordisk	1.44	32.1%
2	6	Bristol Myers Squibb	0.65	17.9%
3	23	DexCom	0.60	65.4%
4	1	GSK	0.34	5.4%
5	15	KRKA	0.34	16.0%

Highest Absolute Variations in Value | August 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	4.77	26.7%
2	3	Novartis	3.08	41.7%
3	2	Janssen	2.07	18.1%
4	4	Amgen	1.19	16.2%
5	10	Astellas	1.05	67.6%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Accord	0.77	18.8%
2	3	Clonmel	0.49	21.6%
3	4	Rowa	0.32	18.5%
4	6	Pinewood	0.26	18.8%
5	5	KRKA	0.23	14.5%

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, Novartis 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 +€1.44m (+32.1%) growth when compared to August 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 +€0.77m (+18.8%).

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Top 5 Companies | By Sell-Out Units

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Highest Absolute Variations in Units | August 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	2	Accord	91.9	10.1%
2	4	Clonmel	87.9	9.9%
3	9	KRKA	64.1	17.9%
4	3	Nutricia	58.6	6.2%
5	1	Teva	51.3	5.3%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	2	Accord	90.6	10.0%
2	4	Clonmel	87.6	9.9%
3	9	KRKA	64.0	17.9%
4	3	Nutricia	58.6	6.2%
5	1	Teva	50.6	5.2%

Highest Absolute Variations in Units | August 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Amgen	3.35	22.6%
2	3	Novartis	2.89	47.2%
3	10	Accord	1.23	44.3%
4	25	Athena	0.79	-
5	21	Takeda	0.77	131.9%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Accord	80.1	11.1%
2	3	Clonmel	75.9	18.2%
3	6	Pinewood	48.6	23.6%
4	2	Teva	46.0	6.1%
5	5	KRKA	42.9	16.9%

The pharma market and the market excluding the high-tech share the exact companies under the same order: Accord, Clonmel, Krka, Nutricia and Teva.

In the High Tech Market Amgen stepped up to the leadership with an absolute variation of +3.35 Thousand units (+22.6%) closely followed by Novartis with an absolute variation of +2.89 Thousand units (+47.2%), and Athena jumped to the fourth position of the ranking with the support of Pedippi@.

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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).

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