Market Watch Ireland

September 2022

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Country Manager

Knowledge for better health

We believe in the power of Knowledge.

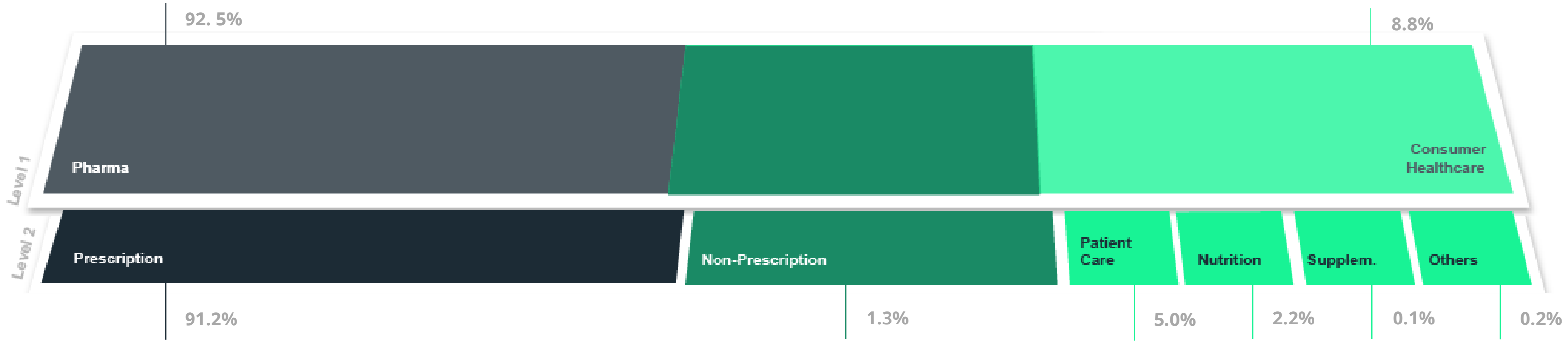
A deep knowledge of the market is the first step to deliver unique market insights. It's that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyse the market.

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

Total Market

Dynamics of the Pharmacy Channel

September 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	September 2022						MAT September 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**217.8 €**	**100.0%**	**5.2%**	**11.6**	**100.0%**	**5.4%**	**2,528.8 €**	**100.0%**	**7.5%**	**134.7**	**100.0%**	**5.0%**
Pharma Market	**201.4 €**	**92.5%**	5.0%	**9.2**	**79.4%**	5.5%	**2342.6**	**92.6%**	7.8%	**107.7**	**80.0%**	6.2%
Consumer Healthcare	**19.2 €**	**8.8%**	7.2%	**2.8**	**24.3%**	4.7%	**218.6**	**8.6%**	4.3%	**32.0**	**23.8%**	0.6%
Prescription Medicines	198.6 €	91.2%	5.0%	8.8	75.7%	5.6%	2,310.2 €	91.4%	7.9%	102.7	76.2%	6.5%
Branded	179.3 €	82.3%	4.5%	5.5	47.6%	4.8%	2,090.5 €	82.7%	7.8%	64.8	48.1%	5.9%
Generic	19.3 €	8.9%	10.1%	3.3	28.1%	7.0%	219.7 €	8.7%	8.2%	37.9	28.1%	7.6%
Non Prescription (OTC)	2.8 €	1.3%	7.4%	0.4	3.7%	4.3%	32.4 €	1.3%	3.2%	5.0	3.7%	1.0%
Branded	2.6 €	1.2%	7.2%	0.4	3.3%	4.2%	29.8 €	1.2%	2.9%	4.5	3.3%	0.9%
Generic	0.2 €	0.1%	9.5%	0.05	0.4%	4.7%	2.7 €	0.1%	6.3%	0.5	0.4%	1.9%
Nutrition	4.8 €	2.2%	3.4%	1.8	15.6%	5.3%	55.0 €	2.2%	0.3%	20.3	15.1%	0.9%
Patient Care	11.0 €	5.0%	9.5%	0.5	4.7%	3.3%	125.2 €	5.0%	6.8%	6.3	4.6%	-0.3%
Supplements	0.2 €	0.1%	-0.4%	0.02	0.2%	3.6%	2.8 €	0.1%	-1.4%	0.2	0.2%	-1.7%
Others	0.3 €	0.2%	-4.5%	0.02	0.1%	-3.7%	3.1 €	0.1%	-4.6%	0.2	0.1%	-6.2%

HMR health market research

In September 2022 the dispensary retail market increased by +5.2% in value and +5.4% 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 91.2% and 1.3% respectively. Figures that are aligned with previous months.

In the moving annual total (MAT) analysis the market is growing at +7.5% in value and +5.0% in units.

Branded prescription medicines consolidated its position as the main market driver in value with a MAT growth of +8.2%, where Generics are showing an MAT value growth of +8.2%.

The Consumer Healthcare 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 5.0% and 2.2% respectively.

The highest market share in the Consumer Market continues to belong to the Patient Care segment with €11.0m (+9.5%) for the month of September and €125.2m (+6.8%) for the MAT period.

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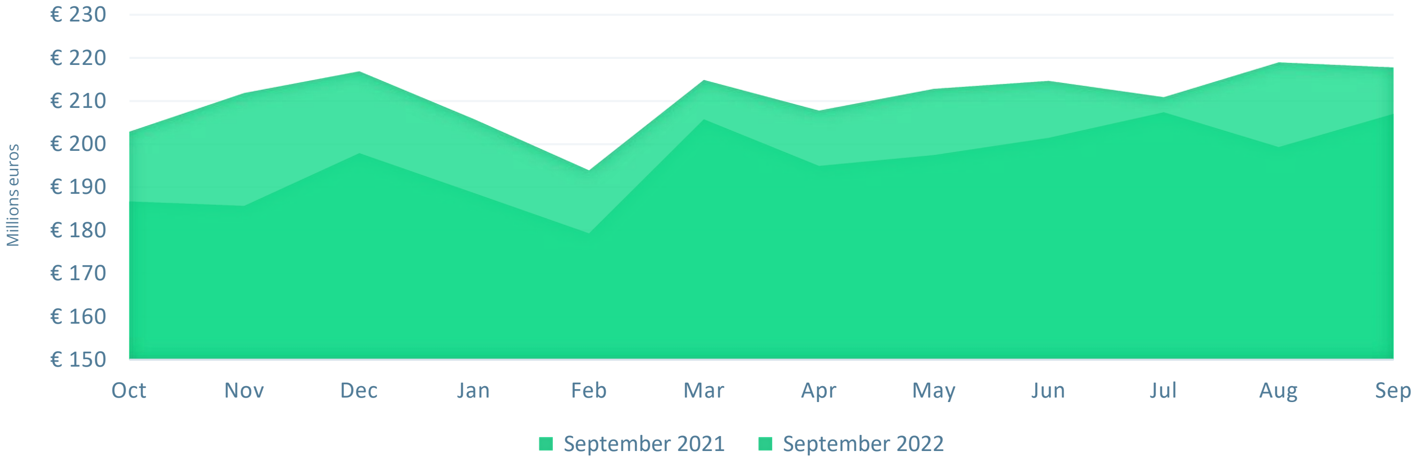
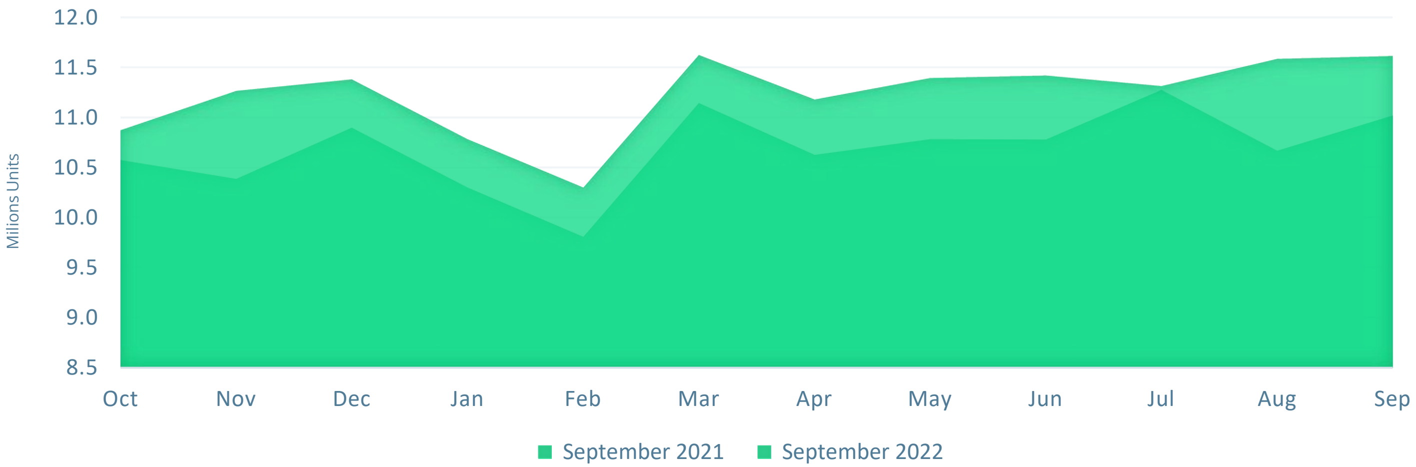
Total Market

Monthly Evolution in Value
September 2021 – September 2022



Monthly Evolution in Units
September 2021 – September 2022



Compared to the previous month of August 2022, September showed a decrease of -0.53% in terms of value but a growth of +0.22% in units dispensed.

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Pharma Market

HMR health market research

Highest Absolute Variations in Value | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	2.0	9.9%
2	10	A10S - GLP-1 agonist antidiabetics	1.4	54.5%
3	5	L04C - Interleukin inhibitors	1.3	16.9%
4	7	L02B - Cytostatic hormone antagonists	1.0	21.1%
5	20	T03A - Diagnostic equipment and accessories	0.8	44.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.5	42.9%
2	8	Ozempic	1.5	93.9%
3	1	Kalydeco	0.9	7.6%
4	4	Stelara	0.7	15.0%
5	7	Zytiga	0.6	26.6%

Highest Absolute Variations in Units | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	C10A - Cholesterol and triglyceride regulating preparations	48.1	7.8%
2	3	N06A - Anti-depressants and mood stabilisers	30.7	5.5%
3	33	G03C - Oestrogens excluding G3A G3E G3F	30.0	75.0%
4	2	A02B - Antiulcerants	28.1	4.9%
5	54	G03D - Progestogens excluding G3A G3F	18.5	74.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	81.5	14.0%
2	64	Nutricrem	19.4	140.9%
3	11	Atorvastatin Accord	18.4	25.1%
4	80	Utrogestan	17.4	153.9%
5	65	Estradot	17.2	111.1%

The Top 5 ATC classes and the Top 5 Brands with highest absolute variations in value added up to +€6.6m and +€6.2m, respectively. Comparing these values to the +€9.7m total market value growth in September 2022 vs September 2021 we see a strong concentration as both Top 5 ATC classes and Top 5 Brands respectively account for 68% and 65% 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 +€2.0m (+9.9%) 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 +€2.5m (+42.9%) for Kaftrio® and +€0.9m (+7.6%) for Kalydeco® that keeps the number one position in the brand rank value.

The GLP1 on the A10S class rank second place for the highest variation, with a positive contribution of +€1.4m (+54.5%). Ozempic@ is driving the class growth with a higher growth of +€1.5m (+93.9%).

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 32.1% and the Top 5 Brands representing 31.8% of the +484.5 Thousand units of the total market units growth in September 2022 vs September 2021.

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

Highest Absolute Variations in Value | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	L04C - Interleukin inhibitors	2.8	44.9%
2	1	R07B - Cystic fibrosis products	2.0	9.9%
3	6	L02B - Cytostatic hormone antagonists	1.7	47.2%
4	9	M01C - Specific anti-rheumatic agents	0.6	28.7%
5	10	D05B - Systemic antipsoriasis products	0.6	34.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.5	42.9%
2	1	Kalydeco	0.9	7.6%
3	14	Xtandi	0.9	119.5%
4	4	Stelara	0.7	15.0%
5	6	Zytiga	0.6	26.6%

Highest Absolute Variations in Units | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	5	L04C - Interleukin inhibitors	2.0	69.7%
2	1	L04B - Anti-TNF products	1.6	7.0%
3	23	A02B - Antiulcerants	0.9	-
4	20	N02C - Anti-migraine preparations	0.8	461.9%
5	27	A07E - Inflammatory bowel disorder products	0.7	-

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Amgevita	1.5	21.8%
2	38	Pedippi	0.9	-
3	45	Entyvio	0.7	-
4	46	Ajovy	0.6	-
5	30	Pergoveris	0.6	149.5%

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.

In terms of unites, the Anti-TNF products of the L04B class stepped up to first position of the rank but second position in the highest absolute variation in units with +1.6 Thousand units (7.0%). 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 September 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@.

Pharma Market | Excluding High Tech

Highest Absolute Variations in Value | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	A10S - GLP-1 agonist antidiabetics	1.4	54.5%
2	10	T03A - Diagnostic equipment and accessories	0.8	44.1%
3	2	B01F - Direct factor Xa inhibitors	0.7	10.7%
4	12	A10P - SGLT2 inhibitor antidiabetics	0.6	33.4%
5	26	G03D - Progestogens excluding G3A G3F	0.3	34.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Ozempic	1.46	93.9%
2	5	Dexcom	0.61	64.3%
3	1	Eliquis	0.56	14.6%
4	10	Forxiga	0.39	58.4%
5	41	Utrogestan	0.28	149.4%

Highest Absolute Variations in Units | September 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	2	C10A - Cholesterol and triglyceride regulating preparations	48.1	7.8%
2	4	N06A - Anti-depressants and mood stabilisers	30.7	5.5%
3	34	G03C - Oestrogens excluding G3A G3E G3F	30.0	75.0%
4	3	A02B - Antiulcerants	27.3	4.7%
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Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
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2	64	Nutricrem	19.4	140.9%
3	11	Atorvastatin Accord	18.4	25.1%
4	80	Utrogestan	17.4	153.9%
5	65	Estradot	17.2	111.1%

When analysing the Pharma Market excluding the medicines reimbursement under the High Tech Scheme arrangements, the antidiabetic classes, A10S and A10P hold first and fourth position in the absolute value variation rankings. The Class A10S GLP-1 agonists presents a variation of +€1.4m (+54.5%) with Ozempic® observing a growth of +€1.46m (+93.9%) in relation to September 2021. The A10P SGLT2 inhibitors class increased by +€0.6m (33.4%), 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 (+58.4%) and keeping to increase the gap to the other competitors in the class.

The Direct factor Xa inhibitors B01F Class hold the third position with a growth of +€0.7m (+10.7%). 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 +€0.56m (+14.6%) 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 variation in units, with the two rankings having similar top players at both ATC Classes and Brand levels.

Pharma Market | Generic

Highest Absolute Variations in Value | September 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var. %
1	3	Lenalidomide	0.80	-
2	27	Posaconazole	0.10	88.8%
3	32	Dutasteride + Tamsulosin	0.10	115.0%
4	16	Amoxicillin	0.07	25.6%
5	18	Ezetimibe	0.06	25.6%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	7	Lenalidomide Accord	0.29	-
2	14	Lenalidomide Rowex	0.21	-
3	19	Lenalidomide Clonmel	0.19	-
4	48	Lenalidomide Teva	0.11	-
5	24	Posaconazole Accord	0.08	97.4%

Highest Absolute Variations in Units | September 2022

INN's

rank var abs	rank value	INN	Var. Abs. Th Units	Var. %
1	1	Atorvastatin	27.2	8.6%
2	3	Rosuvastatin	17.2	9.7%
3	11	Paracetamol	12.9	16.2%
4	6	Sertraline	12.8	13.1%
5	41	Dutasteride + Tamsulosin	11.8	142.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	3	Atorvastatin Accord	18.4	25.1%
2	28	Rosuvastatin Accord	15.0	100.2%
3	13	Bisoprolol Accord	12.7	36.2%
4	19	Rosuvastatin Clonmel	12.4	44.8%
5	6	Atorvastatin Pinewood	12.1	20.0%

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 Atorvastatin is 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

Highest Absolute Variations in Value | September 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	1.99	9.9%
2	8	Novo Nordisk	1.50	31.1%
3	2	Janssen	1.41	10.7%
4	12	AstraZeneca	0.97	21.7%
5	3	Novartis	0.97	7.9%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	2	Novo Nordisk	1.50	32.8%
2	22	DexCom	0.61	64.3%
3	6	Bristol Myers Squibb	0.54	14.4%
4	7	Clonmel	0.32	8.2%
5	19	Pinewood	0.24	15.8%

Highest Absolute Variations in Value | September 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	3	Novartis	2.28	27.4%
2	1	Vertex	1.99	9.9%
3	2	Janssen	1.43	12.0%
4	10	Astellas	0.84	51.0%
5	11	AstraZeneca	0.80	51.7%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Accord	0.73	18.0%
2	3	Clonmel	0.53	22.9%
3	6	Pinewood	0.24	16.1%
4	5	KRKA	0.17	10.4%
5	4	Rowa	0.13	7.1%

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, AstraZeneca 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 +€1.50m (+32.8%) growth when compared to September 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 +€0.73m (+18.0%).

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Top 5 Companies | By Sell-Out Units

health market research

Highest Absolute Variations in Units | September 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	4	Clonmel	78.6	8.6%
2	3	Accord	74.4	8.1%
3	12	Pinewood	51.0	22.2%
4	9	KRKA	49.6	13.5%
5	1	Nutricia	46.1	4.7%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	4	Clonmel	78.4	8.6%
2	3	Accord	73.1	8.0%
3	12	Pinewood	51.0	22.2%
4	9	KRKA	49.5	13.5%
5	1	Nutricia	46.1	4.7%

Highest Absolute Variations in Units | September 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Amgen	2.07	12.9%
2	3	Novartis	1.45	19.7%
3	10	Accord	1.33	48.3%
4	24	Athena	0.86	-
5	8	Janssen	0.82	21.2%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Accord	72.9	10.1%
2	3	Clonmel	70.8	16.6%
3	6	Pinewood	50.5	22.7%
4	5	KRKA	34.1	13.1%
5	2	Teva	3.5	0.5%

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

In the High Tech Market Amgen kept the leadership with an absolute variation of +2.07 Thousand units (+12.9%) closely followed by Novartis with an absolute variation of +1.45 Thousand units (+19.7%). Athena kept the fourth position of the ranking with the strong support of Pedippi@.

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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