Market Watch Ireland

October 2022

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Country Manager

Knowledge for better health

We believe in the power of Knowledge.

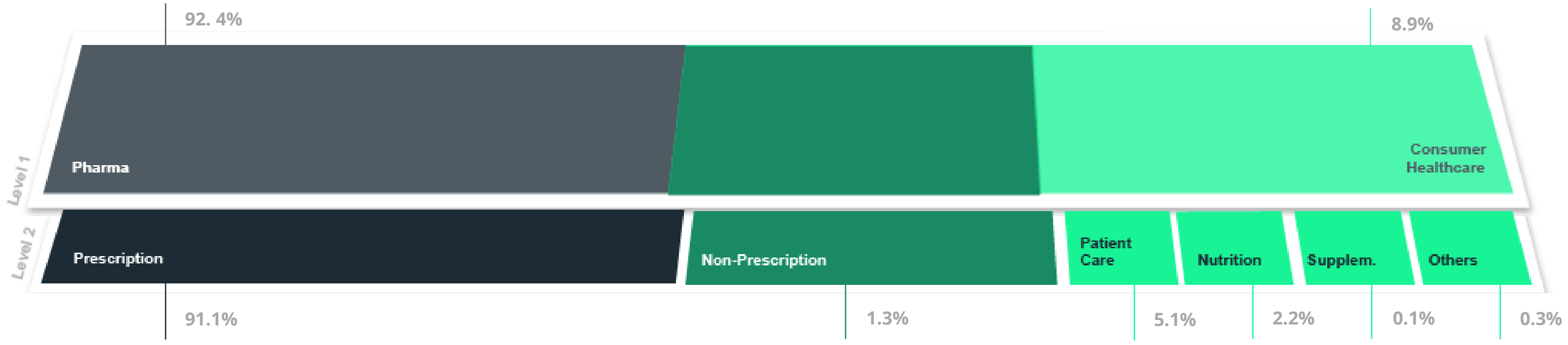
A deep knowledge of the market is the first step to deliver unique market insights. It's that information that takes us further and gives more meaning to all the data and numbers that so efficiently analyse the market.

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

Total Market

Dynamics of the Pharmacy Channel

October 2022
Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	October 2022						MAT October 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	212.5 €	100.0%	4.8%	11.4	100.0%	4.6%	2,538.4 €	100.0%	7.2%	135.2	100.0%	5.2%
Pharma Market	196.4 €	92.4%	4.4%	9.0	79.6%	3.7%	2350.9	92.6%	7.4%	108.1	79.9%	6.2%
Consumer Healthcare	18.9 €	8.9%	8.9%	2.7	24.1%	7.4%	220.2	8.7%	5.0%	32.2	23.8%	1.4%
Prescription Medicines	193.7 €	91.1%	4.4%	8.6	75.9%	3.7%	2,318.3 €	91.3%	7.4%	103.0	76.2%	6.4%
Branded	174.5 €	82.1%	3.8%	5.4	47.6%	2.3%	2,096.9 €	82.6%	7.3%	64.9	48.0%	5.8%
Generic	19.2 €	9.0%	10.2%	3.2	28.3%	6.1%	221.4 €	8.7%	8.6%	38.1	28.2%	7.6%
Non Prescription (OTC)	2.8 €	1.3%	6.3%	0.4	3.7%	3.2%	32.6 €	1.3%	3.7%	5.0	3.7%	1.4%
Branded	2.5 €	1.2%	5.8%	0.4	3.3%	2.9%	29.9 €	1.2%	3.4%	4.5	3.3%	1.3%
Generic	0.2 €	0.1%	11.6%	0.05	0.4%	5.7%	2.7 €	0.1%	6.4%	0.5	0.4%	2.0%
Nutrition	4.7 €	2.2%	8.2%	1.8	15.5%	9.7%	55.4 €	2.2%	1.2%	20.5	15.2%	1.8%
Patient Care	10.8 €	5.1%	9.8%	0.5	4.6%	4.1%	126.2 €	5.0%	7.5%	6.3	4.6%	0.2%
Supplements	0.2 €	0.1%	-1.1%	0.02	0.2%	2.5%	2.8 €	0.1%	-1.8%	0.2	0.2%	-1.4%
Others	0.3 €	0.2%	19.7%	0.01	0.1%	-0.3%	3.2 €	0.1%	-2.6%	0.2	0.1%	-5.5%

In October 2022 the dispensary retail market increased by +4.8% in value and +4.6% in units, when compared to the same period of the previous year.

The Pharma Market represented 92.4% of the total dispensary retail market with Prescription and Non-prescription medicines representing 91.1% and 1.3% respectively. Figures that are aligned with previous months.

In the moving annual total (MAT) analysis the market is growing at +7.2% in value and +5.2% in units.

Branded prescription medicines consolidated its position as the main market driver in total value, showing a MAT growth of +7.3% and Generics performing at an even higher MAT value growth rate of +8.6%.

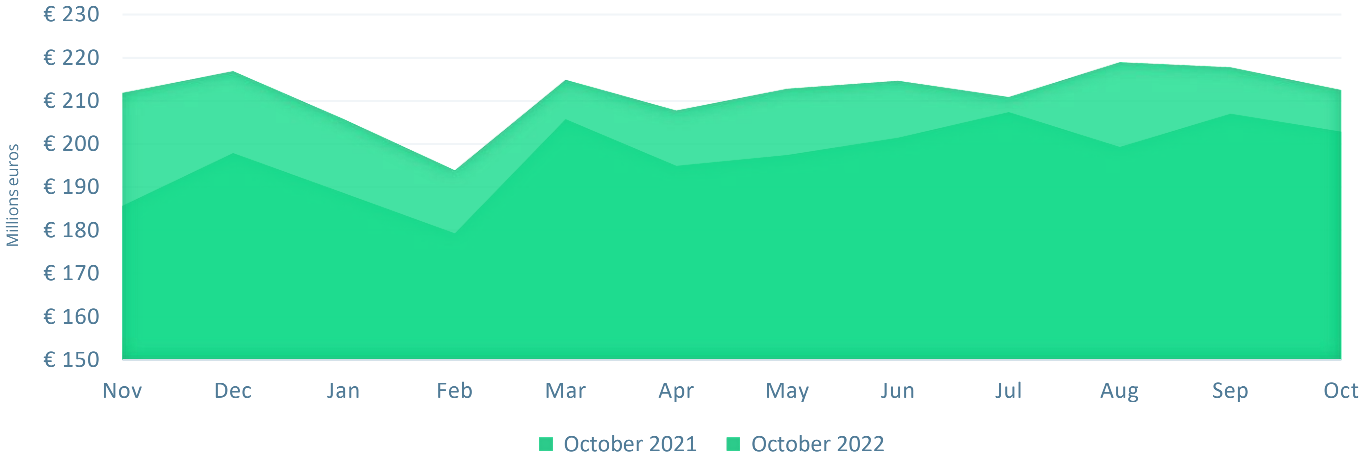
The Consumer Healthcare Market currently represents 8.9% of the total MAT dispensary market share value, with Non-prescription medicines contributing 1.3% and Patient care and Nutrition segments 5.1% and 2.2% respectively.

The highest market share in the Consumer Market continues to belong to the Patient Care segment with €10.8m (+9.8%) for the month of October and €126.2m (+7.5%) for the MAT period.

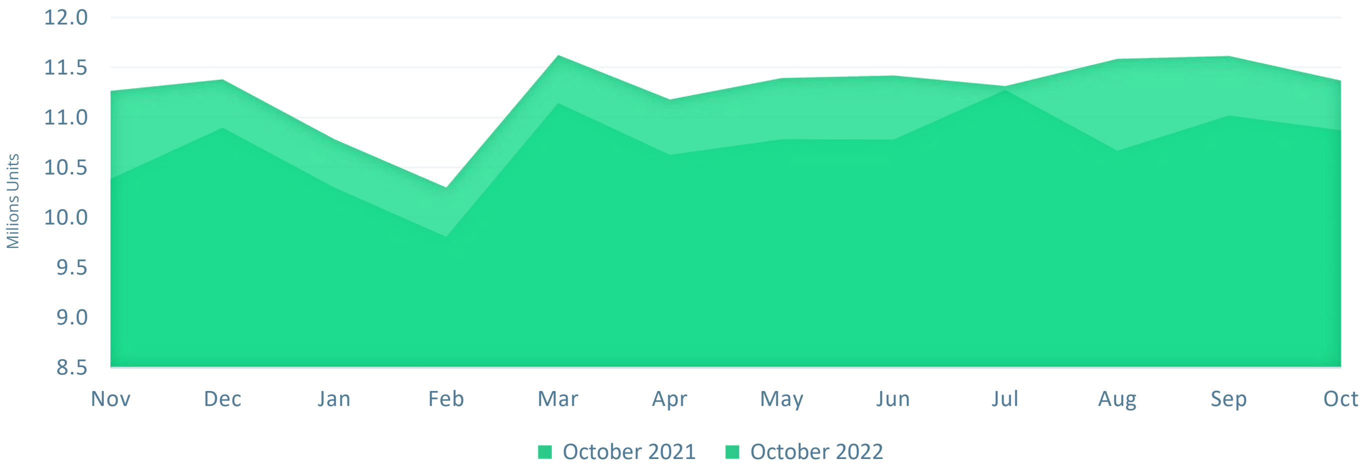
Published on 10th November 2022

Total Market

Monthly Evolution in Value
October 2021 – October 2022



Monthly Evolution in Units
October 2021 – October 2022



Compared to the previous month of September 2022, October showed a decrease of -2.4% in value and of -2.1% in units dispensed.

For this comparison we need to bear in mind that October had 5 weekends and one bank holyday, on the 31st, and September had only 4 weekends.

Published on 10th November 2022

Pharma Market

Highest Absolute Variations in Value | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	2.7	15.2%
2	10	A10S - GLP-1 agonist antidiabetics	1.6	58.3%
3	5	L04C - Interleukin inhibitors	1.0	12.6%
4	19	T03A - Diagnostic equipment and accessor.	0.8	43.2%
5	4	V07A - All other non-therapeutic products	0.7	7.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.5	47.1%
2	1	Kalydeco	1.7	16.6%
3	7	Ozempic	1.6	97.7%
4	18	Dexcom	0.7	67.5%
5	3	Amgevita	0.5	10.7%

Highest Absolute Variations in Units | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	V07A - All other non-therapeutic products	178.6	9.4%
2	2	C10A - Cholesterol and triglyceride regulating preparations	36.5	6.0%
3	33	G03C - Oestrogens excluding G3A G3E G3F	29.7	70.6%
4	3	A02B - Antiulcerants	19.4	3.4%
5	50	G03D - Progestogens excluding G3A G3F	19.2	75.7%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	105.3	19.4%
2	15	Lecalpin	27.7	54.2%
3	2	Ensure	21.6	6.3%
4	57	Nutricrem	20.4	147.7%
5	55	Estradot	20.3	125.1%

The Top 5 ATC classes and the Top 5 Brands with highest absolute variations in value added up to +€6.8m and +€6.9m, respectively. Comparing these values to the +€8.3m total market value growth in October 2022 vs October 2021 we see a strong concentration as both Top 5 ATC classes and Top 5 Brands respectively account for 82% and 84% 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 +€2.7m (+15.2%) 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 (+47.1%) for Kaftrio® and +€1.7m (+16.6%) for Kalydeco® that keeps the number one position in the brand rank value. On the opposite side, Revlimid@ showed the highest decrease with a performance of -€3.3m.

The GLP1 on the A10S class rank second place for the highest variation, with a positive contribution of +€1.6m (+58.3%). Ozempic@ is driving the class growth with a higher growth of +€1.7m (+97.7%).

The market value growth in units is not as concentrated in the Top 5 Brands as in the value analysis. With the Top 5 ATC classes holding 88.5% and the Top 5 Brands representing 61.0% of the +320.4 Thousand units of the total market units growth in October 2022 vs October 2021.

The Class V07A that includes all other non-therapeutic products holds the highest absolute variation in the units rank with +178.6 Thousand units (+9.4%). In this space Fortisip@ and Ensure@ continue to drive the growth.

Published on 10th November 2022

Pharma Market | High Tech

Highest Absolute Variations in Value | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	2.7	15.2%
2	4	L04C - Interleukin inhibitors	1.7	24.2%
3	6	L02B - Cytostatic hormone antagonists	1.4	36.9%
4	10	D05B - Systemic antipsoriasis products	0.6	34.9%
5	22	N07X - All other CNS drugs	0.5	346.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.5	47.1%
2	1	Kalydeco	1.7	16.6%
3	13	Xtandi	0.8	102.4%
4	3	Amgevita	0.5	10.7%
5	47	Vyndaqel	0.5	-

Highest Absolute Variations in Units | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	L04B - Anti-TNF products	1.6	7.4%
2	5	L04C - Interleukin inhibitors	1.4	39.4%
3	21	A02B - Antiulcerants	1.0	-
4	20	N02C - Anti-migraine preparations	0.9	493.3%
5	27	A07E - Inflammatory bowel disorder products	0.7	7409%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Amgevita	1.5	21.3%
2	32	Pedippi	1.0	-
3	44	Entyvio	0.7	7409%
4	46	Ajovy	0.7	19846%
5	4	Luveris	0.6	17.1%

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.

Recent to the market, the Pfizer medicine Vyndaqel@, for the treatment of wild-type or hereditary transthyretin amyloidosisin adult patients with cardiomyopathy, is already leading the growth in its ATC3 class (N07X - All other CNS drugs) and gaining space in the whole High-Tech segment winning the 5th position of absolute value growth with +€0.5m.

In terms of unites, the Anti-TNF products of the L04B class kept the first position of the rank and also the first position in the highest absolute variation in units with +1.6 Thousand units (+7.4%). 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 ranking third in units absolute variation with +0.7 Thousand units. One other product with less then a year have a space in the top 5, the antiulcerants Pedippi@.

Pharma Market | Excluding High Tech

health market research

Highest Absolute Variations in Value | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	A10S - GLP-1 agonist antidiabetics	1.6	58.3%
2	10	T03A - Diagnostic equipment and accessor.	0.8	43.2%
3	1	V07A - All other non-therapeutic products	0.7	7.3%
4	12	A10P - SGLT2 inhibitor antidiabetics	0.6	31.1%
5	2	B01F - Direct factor Xa inhibitors	0.5	7.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Ozempic	1.57	97.7%
2	5	Dexcom	0.66	67.5%
3	1	Eliquis	0.43	11.3%
4	10	Forxiga	0.36	52.3%
5	36	Utrogestan	0.28	142.6%

Highest Absolute Variations in Units | October 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	V07A - All other non-therapeutic products	178.6	9.4%
2	2	C10A - Cholesterol and triglyceride regulating preparations	36.4	6.0%
3	33	G03C - Oestrogens excluding G3A G3E G3F	29.7	70.6%
4	50	G03D - Progestogens excluding G3A G3F	19.2	75.7%
5	3	A02B - Antiulcerants	18.4	3.3%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	105.3	19.4%
2	15	Lecalpin	27.7	54.2%
3	2	Ensure	21.6	6.3%
4	57	Nutricrem	20.4	147.7%
5	55	Estradot	20.3	125.1%

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 +€1.6m (+58.3%) with Ozempic® observing a growth of +€1.57m (+97.7%) in relation to October 2021. The A10P SGLT2 inhibitors class increased by +€0.6m (31.1%), 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) with Forxiga® showing a growth of +€0.36m (+52.3%) and keeping to increase the gap to the other competitors in the class.

The Direct factor Xa inhibitors B01F Class hold the fourth position with a growth of +€0.5m (+7.8%). 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 +€0.43m (+11.3%) 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 | October 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var. %
1	3	Lenalidomide	0.77	-
2	50	Abiraterone	0.11	-
3	30	Dutasteride + Tamsulosin	0.10	110.3%
4	8	Amoxicillin	0.09	25.3%
5	20	Imatinib	0.07	37.5%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	7	Lenalidomide Accord	0.29	-
2	18	Lenalidomide Clonmel	0.20	-
3	21	Lenalidomide Rowex	0.18	-
4	5	Lecalpin	0.12	54.9%
5	44	Lenalidomide Teva	0.11	-

Highest Absolute Variations in Units | October 2022

INN's

rank var abs	rank value	INN	Var. Abs. Th Units	Var. %
1	1	Atorvastatin	21.9	7.0%
2	14	Amoxicillin	15.1	27.0%
3	10	Paracetamol	14.6	18.2%
4	3	Rosuvastatin	13.2	7.5%
5	42	Dutasteride + Tamsulosin	11.4	137.2%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	5	Lecalpin	27.7	54.2%
2	29	Rosuvastatin Accord	17.8	150.5%
3	19	Pinamox	17.1	76.2%
4	3	Atorvastatin Accord	16.1	21.6%
5	14	Pantoprazole Teva Pharma	13.1	38.9%

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 +€0.77m.

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

Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | October 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	2.69	15.2%
2	8	Novo Nordisk	1.68	35.0%
3	11	AstraZeneca	0.82	17.5%
4	12	Accord	0.78	16.6%
5	2	Janssen	0.75	5.8%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	2	Novo Nordisk	1.69	37.3%
2	21	DexCom	0.66	67.5%
3	6	Bristol Myers Squibb	0.41	11.1%
4	19	Pinewood	0.27	17.7%
5	17	Amgen	0.24	12.4%

Highest Absolute Variations in Value | October 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	2.69	15.2%
2	2	Janssen	0.82	7.0%
3	10	Astellas	0.82	47.7%
4	12	AstraZeneca	0.71	42.5%
5	19	Accord	0.63	97.1%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Accord	0.78	19.3%
2	3	Clonmel	0.45	19.8%
3	5	Pinewood	0.27	18.1%
4	6	KRKA	0.12	7.4%
5	7	Viatris	0.07	9.2%

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, AstraZeneca, Janssen and Accord.

When analysing the Pharma Market, excluding the medicines reimbursement under the High Tech Scheme arrangements, Novo Nordisk leads the absolute variation with a +€1.69m (+37.3%) growth when compared to October 2021, with Ozempic@ as a strong contributor to the growth and Saxenda@ ramping up.

Within 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 +€0.78m (+19.3%).

Published on 10th November 2022

Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | October 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	2	Nutricia	78.8	8.7%
2	3	Accord	68.8	7.6%
3	12	Pinewood	53.8	23.0%
4	8	KRKA	48.3	13.3%
5	20	Nualtra	29.6	31.3%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	2	Nutricia	78.8	8.7%
2	3	Accord	67.6	7.5%
3	12	Pinewood	53.8	23.0%
4	8	KRKA	48.4	13.4%
5	20	Nualtra	29.6	31.3%

Highest Absolute Variations in Units | October 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Amgen	1.88	12.2%
2	10	Accord	1.23	44.7%
3	24	Athena	0.98	-
4	25	Celltrion	0.93	-
5	11	Teva	0.82	34.6%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Accord	70.2	9.8%
2	6	Pinewood	53.7	23.7%
3	3	Clonmel	42.6	10.0%
4	5	KRKA	31.2	12.2%
5	2	Teva	10.9	1.4%

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

In the High Tech Market Amgen kept the leadership with an absolute variation of +1.88 Thousand units (+12.2%) closely followed by Accord with an absolute variation of +1.23 Thousand units (+44.7%). Athena kept a position in the ranking with the strong support of Pedippi@.

Published on 10th November 2022

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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