Market Watch Ireland

November 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.

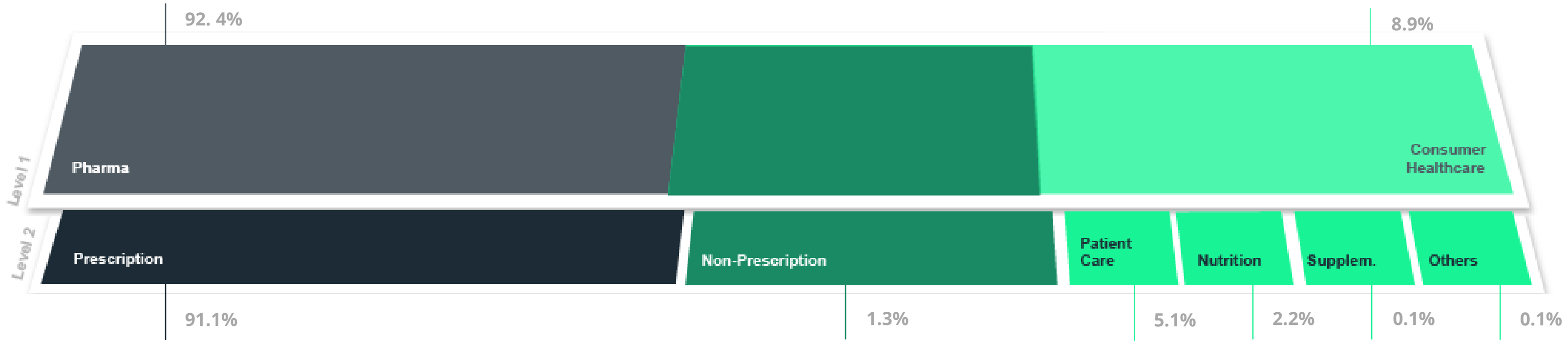
Because we believe that the power of knowledge grows when it is shared. And can change lives.

Total Market

Dynamics of the Pharmacy Channel

November 2022

Weight by segment and subsegments (value)



Dynamics of the Pharmacy Channel

By subsegments

	November 2022						MAT November 2022					
	Value			Units			Value			Units		
	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION	In Million €	MS%	VARIATION	In Millions	MS%	VARIATION
Total Market	**225.6 €**	**100.0%**	**6.5%**	**12.1**	**100.0%**	**7.2%**	**2,552.2 €**	**100.0%**	**6.6%**	**136.0**	**100.0%**	**5.1%**
Pharma Market	**208.6 €**	**92.4%**	6.1%	**9.6**	**79.7%**	6.4%	**2363.0**	**92.6%**	6.7%	**108.6**	**79.9%**	5.8%
Consumer Healthcare	**20.0 €**	**8.9%**	10.9%	**2.9**	**24.1%**	9.9%	**222.1**	**8.7%**	5.5%	**32.5**	**23.9%**	2.2%
Prescription Medicines	205.6 €	91.1%	6.1%	9.2	75.9%	6.4%	2,330.1 €	91.3%	6.7%	103.6	76.1%	6.0%
Branded	184.7 €	81.9%	5.2%	5.7	47.3%	4.5%	2,105.9 €	82.5%	6.5%	65.2	47.9%	5.3%
Generic	20.9 €	9.2%	15.2%	3.5	28.6%	9.7%	224.2 €	8.8%	8.9%	38.4	28.2%	7.4%
Non Prescription (OTC)	3.0 €	1.3%	8.9%	0.5	3.8%	6.9%	32.9 €	1.3%	4.0%	5.1	3.7%	1.8%
Branded	2.7 €	1.2%	8.5%	0.4	3.3%	6.8%	30.1 €	1.2%	3.7%	4.5	3.3%	1.7%
Generic	0.3 €	0.1%	12.8%	0.05	0.4%	7.6%	2.8 €	0.1%	6.8%	0.6	0.4%	2.4%
Nutrition	5.0 €	2.2%	9.7%	1.9	15.5%	12.0%	55.8 €	2.2%	2.0%	20.7	15.2%	2.8%
Patient Care	11.5 €	5.1%	11.9%	0.6	4.6%	5.7%	127.4 €	5.0%	8.0%	6.3	4.6%	0.8%
Supplements	0.3 €	0.1%	11.7%	0.02	0.2%	11.0%	2.8 €	0.1%	-1.1%	0.2	0.2%	-0.6%
Others	0.3 €	0.1%	14.0%	0.01	0.1%	8.6%	3.2 €	0.1%	-1.9%	0.2	0.1%	-4.2%

In November 2022 the dispensary retail market increased by +6.5% in value and +7.2% 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 in line with previous months.

In the moving annual total (MAT) analysis the market is growing at +6.6% in value and +5.1% in units.

Branded prescription medicines are the main market driver in total value, showing a MAT growth of +5.5%. With a smaller share of this market, 8.8%, the prescription Generics are performing at an higher MAT value growth rate of +8.9%.

The Consumer Healthcare Market currently represents 8.7% 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 €15.5m (+11.9%) for the month of November and €127.4m (+8.0%) for the MAT period.

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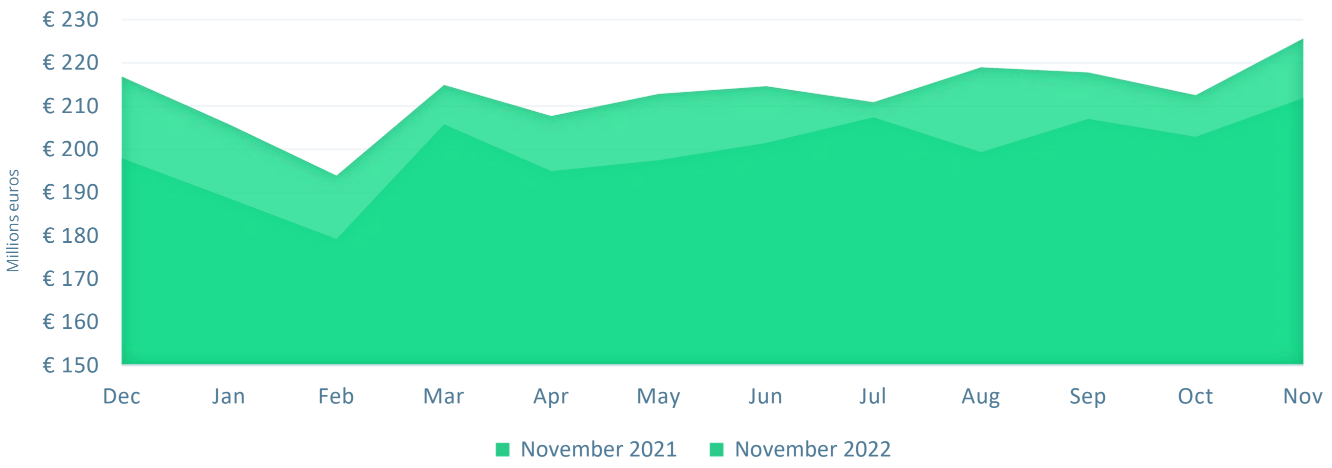
Total Market

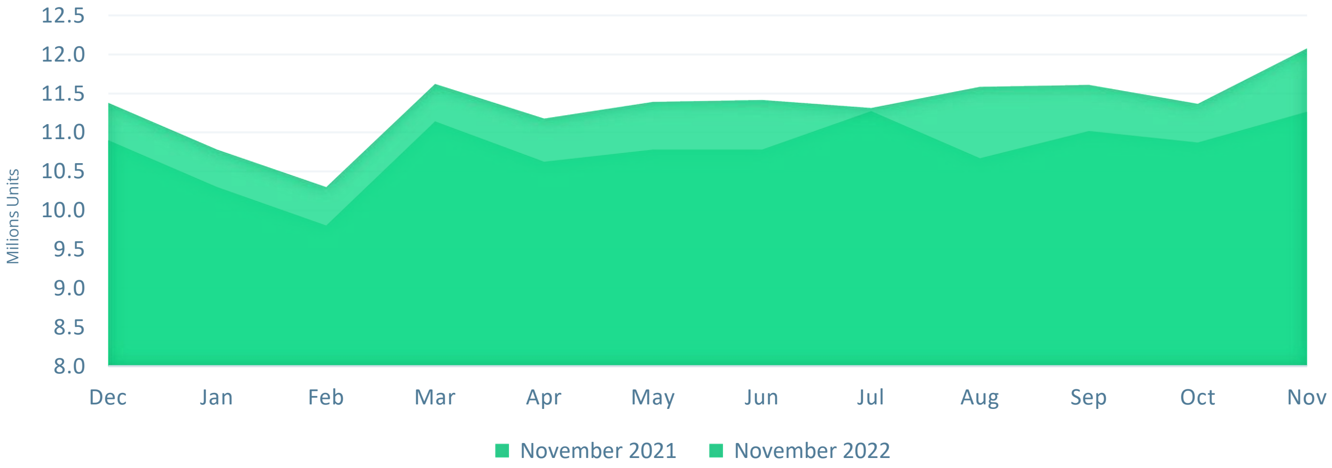
Monthly Evolution in Value

November 2021 – November 2022



Monthly Evolution in Units

November 2021 – November 2022



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Compared to the previous month of October 2022, November showed an increase of +6.2% in value and of +6.3% in units dispensed.

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Pharma Market

Highest Absolute Variations in Value | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	2.6	13.2%
2	9	A10S - GLP-1 agonist antidiabetics	1.7	60.8%
3	5	L04C - Interleukin inhibitors	1.2	14.7%
4	19	T03A - Diagnostic equipment and accessor.	0.9	46.7%
5	4	V07A - All other non-therapeutic products	0.9	8.8%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.0	31.7%
2	1	Kalydeco	1.9	16.9%
3	7	Ozempic	1.7	98.5%
4	14	Dexcom	0.8	74.2%
5	4	Stelara	0.6	13.4%

Highest Absolute Variations in Units | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	V07A - All other non-therapeutic products	227.4	11.6%
2	2	C10A - Cholesterol and triglyceride reg. pre.	56.9	8.9%
3	3	A02B - Antiulcerants	37.7	6.4%
4	32	G03C - Oestrogens excluding G3A G3E G3F	35.6	80.3%
5	16	J01C - Broad spectrum penicillins	34.4	24.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	124.4	21.9%
2	14	Lecalpin	42.3	82.1%
3	42	Oramox	29.4	180.3%
4	59	Nutricrem	23.6	177.1%
5	50	Estradot	23.6	130.2%

health market research

Of the Top 5 ATC classes with highest absolute variations in value the Cystic Fibrosis R07B class maintains leadership of the rank with +€2.6m (+13.2%) 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 +€2.0m (+31.7%) for Kaftrio® and +€1.9m (+16.9%) 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 -€3.5m.

On the bottom of the MAT ranking, the brands that lost the most value in the last 12 months are Revlimid® -€24.5m, Orkambi® - €12.1m and Humira® with -€7.6.

The GLP1 on the A10S class rank second place for the highest variation, with a positive contribution of +€1.7m (+60.8%). Ozempic® is driving the class growth with a higher growth of +€1.7m (+16.9%).

The Class V07A that includes all other non-therapeutic products holds the highest absolute variation in the units rank with +227.4 Thousand units (+11.6%). In this space Fortisip® is driving the growth.

Pharma Market | High Tech

Highest Absolute Variations in Value | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	1	R07B - Cystic fibrosis products	2.6	13.2%
2	4	L04C - Interleukin inhibitors	1.6	21.3%
3	10	D05B - Systemic antipsoriasis products	0.8	44.2%
4	3	L01H - Protein kinase inhib. antineoplastics	0.8	6.8%
5	21	N07X - All other CNS drugs	0.6	437.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Kaftrio	2.0	31.7%
2	1	Kalydeco	1.9	16.9%
3	13	Xtandi	0.8	89.6%
4	4	Stelara	0.6	13.4%
5	15	Tremfya	0.6	86.3%

Highest Absolute Variations in Units | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	L04B - Anti-TNF products	1.9	8.1%
2	5	L04C - Interleukin inhibitors	1.1	29.1%
3	21	A02B - Antiulcerants	1.1	-
4	20	N02C - Anti-migraine preparations	0.8	302.9%
5	2	L04X - Other immunosuppressants	0.8	5%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Amgevita	1.5	20.3%
2	29	Pedippi	1.1	-
3	24	Pergoveris	0.8	174%
4	41	Entyvio	0.7	803%
5	9	Cosentyx	0.6	28.3%

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.

In terms of units, 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 +1.9 Thousand units (+8.1%). With Amgevita®, from Amgen, ranking first in the units rank and the units rank with the highest variation.

Pharma Market | Excluding High Tech

health market research

Highest Absolute Variations in Value | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. M€	Var. %
1	4	A10S - GLP-1 agonist antidiabetics	1.7	60.8%
2	9	T03A - Diagnostic equipment and accessor.	0.9	46.7%
3	2	B01F - Direct factor Xa inhibitors	0.8	12.0%
4	12	A10P - SGLT2 inhibitor antidiabetics	0.7	34.0%
5	13	R03L - Anticholinergics comb with B2-agoni.	0.4	16.9%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	2	Ozempic	1.72	98.5%
2	5	Dexcom	0.78	74.2%
3	1	Eliquis	0.64	16.0%
4	9	Forxiga	0.44	59.1%
5	35	Utrogestan	0.30	128.7%

Highest Absolute Variations in Units | November 2022

ATC3

rank var abs	rank value	ATC3	Var. Abs. Th Units	Var. %
1	1	V07A - All other non-therapeutic products	227.4	11.6%
2	2	C10A - Cholesterol and triglyceride reg. prp.	56.8	8.9%
3	3	A02B - Antiulcerants	36.7	6.3%
4	32	G03C - Oestrogens excluding G3A G3E G3F	35.6	80.3%
5	16	J01C - Broad spectrum penicillins	34.4	24.1%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	1	Fortisip	124.4	21.9%
2	14	Lecalpin	42.3	82.1%
3	42	Oramox	29.4	180.3%
4	59	Nutricrem	23.6	177.1%
5	50	Estradot	23.6	130.2%

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 +€1.7m (+60.8%) with Ozempic® observing a growth of +€1.72m (+98.5%) in relation to November 2021. The A10P SGLT2 inhibitors class increased by +€0.7m (34.0%), 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 +€0.44m (+59.1%) and keeping to increase the gap to the other competitors in the class.

The Direct factor Xa inhibitors B01F Class stepped up to the third position with a growth of +€0.8m (+12.0%). 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 +€0.64m (+16.0%) 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.

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Pharma Market | Generic

Highest Absolute Variations in Value | November 2022

INN's

rank var abs	rank value	INN	Var. Abs. M€	Var. %
1	3	Lenalidomide	0.90	-
2	35	Abiraterone	0.19	-
3	6	Amoxicillin	0.19	52.4%
4	22	Paracetamol	0.12	78.4%
5	30	Dutasteride + Tamsulosin	0.10	110.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. M€	Var. %
1	6	Lenalidomide Accord	0.35	-
2	13	Lenalidomid Clonmel	0.23	-
3	4	Lecalpin	0.18	81.3%
4	32	Lenalidomide Rowex	0.15	-
5	33	Lenalidomide Teva	0.15	-

Highest Absolute Variations in Units | November 2022

INN's

rank var abs	rank value	INN	Var. Abs. Th Units	Var. %
1	13	Amoxicillin	33.6	69.9%
2	1	Atorvastatin	32.4	9.9%
3	10	Paracetamol	21.3	25.2%
4	3	Rosuvastatin	18.9	10.3%
5	5	Pantoprazole	14.2	12.0%

Brands

rank var abs	rank value	BRAND	Var. Abs. Th Units	Var. %
1	5	Lecalpin	42.3	82.1%
2	17	Oramox	29.4	180.3%
3	28	Rosuvastatin Accord	22.8	242.3%
4	13	Pantoprazole Teva	21.8	63.8%
5	18	Pantium	20.9	87.0%

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 +€0.90m.

With the highest variation in units Amoxicilin is first in the absolute variation rank and with Atorvastatin holding first position of the INN units rank.

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Top 5 Companies | By Sell-Out Value

Highest Absolute Variations in Value | November 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	2.59	13.2%
2	8	Novo Nordisk	1.88	37.5%
3	2	Novartis	1.16	9.4%
4	11	Accord	1.13	23.0%
5	32	DexCom	0.78	74.2%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	2	Novo Nordisk	1.84	38.7%
2	20	DexCom	0.78	74.2%
3	5	Bristol Myers Squibb	0.70	18.1%
4	6	Accord	0.37	8.9%
5	15	KRKA	0.33	14.5%

Highest Absolute Variations in Value | November 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Vertex	2.59	13.2%
2	3	Novartis	1.27	13.4%
3	10	Astellas	0.82	43.3%
4	18	Accord	0.76	101.6%
5	24	Celltrion	0.64	#####

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. M€	Var. %
1	1	Accord	1.06	25.3%
2	3	Clonmel	0.57	24.1%
3	5	Pinewood	0.32	20.1%
4	6	KRKA	0.22	13.0%
5	2	Teva	0.20	4.4%

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The Pharma Market and the High-Tech Market, share 3 of the companies in the top 5 with the highest absolute growth in value: Vertex, Novartis 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 +€1.84m (+38.7%) growth when compared to November 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 +€1.06m (+25.3%).

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Top 5 Companies | By Sell-Out Units

Highest Absolute Variations in Units | November 2022

Pharma Market

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	3	Nutricia	96.1	10.2%
2	2	Accord	90.9	9.5%
3	8	KRKA	64.5	17.0%
4	12	Pinewood	54.1	21.3%
5	1	Teva	53.1	5.2%

Pharma Market | Excluding High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	3	Nutricia	96.1	10.2%
2	2	Accord	89.5	9.4%
3	8	KRKA	64.5	17.0%
4	12	Pinewood	54.1	21.3%
5	1	Teva	52.1	5.1%

Highest Absolute Variations in Units | November 2022

Pharma Market | High Tech

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Amgen	1.94	11.8%
2	10	Accord	1.42	46.2%
3	23	Athena	1.07	-
4	3	Novartis	1.06	13.1%
5	24	Celltrion	1.03	10417.5%

Pharma Market | Generic

rank var abs	rank value	Company	Var. Abs. Th Units	Var. %
1	1	Accord	88.1	11.7%
2	3	Clonmel	60.1	13.5%
3	6	Pinewood	53.9	21.9%
4	2	Teva	43.7	5.6%
5	5	KRKA	41.9	15.5%

health market research

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

In the High Tech Market Amgen kept the leadership with an absolute variation of +1.94 Thousand units (+11.8%) closely followed by Accord with an absolute variation of +1.42 Thousand units (+46.2%). Athena kept a position in the ranking with the strong support of Pedippi®.

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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 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