



## PEX PharmaSequence monthly report - November 2018

### Total open market (sell-out report)

	November 2018	Change in comparison to			Cumulative YTD		Forecast		
		October 2018	January 2018	November 2017	2018	Change vs 2018	2018	Change vs 2017	Change vs 2016
<b>Total turnover (PLN million)</b>									
Total open market <sup>1</sup>	<b>3 012</b>	-5,3%	1,5%	9,4%	31 446	4,3%	34 563	4,8%	8,9%
Rx reimbursed <sup>2</sup>	<b>1 055</b>	-6,1%	3,6%	8,4%	11 140	4,4%	12 205	4,6%	6,1%
Rx nonreimbursed <sup>3</sup>	<b>656</b>	-5,2%	7,1%	6,6%	6 857	2,6%	7 528	3,7%	7,0%
Non Rx products <sup>4</sup>	<b>1 279</b>	-4,5%	-2,5%	11,6%	13 207	5,0%	14 567	5,3%	12,3%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>779</b>	-6,2%	6,9%	9,6%	8 168	5,8%	8 939	6,2%	11,0%
Reimbursement share in total turnover	<b>25,9%</b>	-1,0%	5,4%	0,2%	26,0%	1,7%	25,9%	1,4%	1,9%
Reimbursement share in reimbursed sales	<b>72,9%</b>	0,0%	2,0%	1,1%	72,4%	1,8%	72,3%	1,6%	4,9%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>21,1</b>	-0,1%	4,8%	3,3%	20,81	3,0%	20,8	2,7%	5,7%
For reimbursed Rx products <sup>2</sup>	<b>28,0</b>	-1,0%	1,6%	1,6%	28,0	2,2%	28,3	3,1%	4,4%
For nonreimbursed Rx products <sup>3</sup>	<b>25,7</b>	-0,9%	4,1%	2,5%	25,3	3,5%	25,1	2,2%	8,2%
For Non Rx products <sup>4</sup>	<b>16,1</b>	0,5%	4,1%	5,0%	15,7	3,8%	15,7	3,2%	6,5%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>24,9%</b>	-0,5%	-1,9%	0,2%	25,0%	-0,8%	25,0%	-1,0%	-1,9%
For reimbursed Rx products <sup>2</sup>	<b>18,8%</b>	0,7%	3,3%	3,4%	18,6%	0,6%	18,6%	0,2%	-1,0%
For nonreimbursed Rx products <sup>3</sup>	<b>22,0%</b>	-0,8%	-7,8%	-9,7%	23,0%	-7,4%	23,0%	-7,3%	-9,1%
For Non Rx products <sup>4</sup>	<b>29,7%</b>	-1,0%	0,1%	1,9%	29,5%	0,2%	29,4%	-0,1%	-1,4%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>3 770</b>	-6,0%	-1,0%	9,9%	39 870	0,9%	43 710	1,5%	2,6%
Total turnover (PLN thousand) <sup>1</sup>	<b>205</b>	-5,1%	4,3%	12,3%	2 106	4,7%	2 318	5,4%	8,3%

### - Total pharmacy turnover cumulative in PLN million -

2018	Pharmacy market total <sup>1</sup>		Rx reimbursed prescriptions <sup>2</sup>		Rx nonreimbursed prescriptions <sup>3</sup>		Non Rx products <sup>4</sup>	
	Total	Change vs 2018	Total	Change vs 2017	Total	Change vs 2017	Total	Change vs 2017
January	2 968	-1,8%	1 018	3,6%	613	-2,7%	1 312	-5,4%
February	5 784	0,3%	1 950	0,9%	1 216	-0,4%	2 575	0,0%
March	8 896	1,7%	3 024	1,0%	1 879	-0,6%	3 929	3,3%
April	11 531	0,8%	3 981	0,5%	2 471	-1,2%	4 992	1,8%
May	14 152	0,3%	4 936	0,2%	3 057	-1,8%	6 051	1,3%
June	16 943	1,2%	6 023	1,9%	3 680	-0,3%	7 110	1,2%
July	19 653	2,0%	7 003	2,5%	4 288	0,5%	8 208	2,2%
August	22 432	2,7%	7 983	3,0%	4 905	1,1%	9 368	3,2%
September	25 254	2,9%	8 962	3,1%	5 509	1,3%	1 059	3,3%
October	28 434	3,8%	10 085	4,0%	6 201	2,1%	11 928	4,3%
November	31 446	4,3%	11 140	4,4%	6 857	2,6%	13 207	5,0%
December								

#### Retail sales in PLN

PEX PharmaSequence Sp. z o.o.,  
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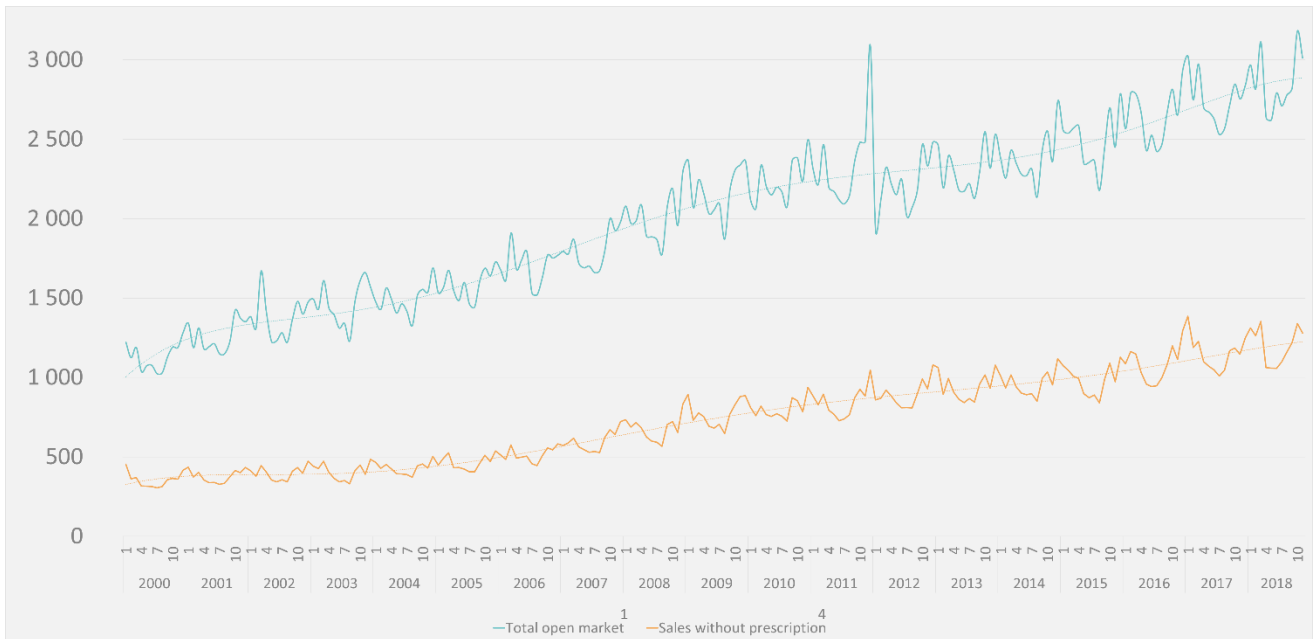
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 1 000 000 zł.



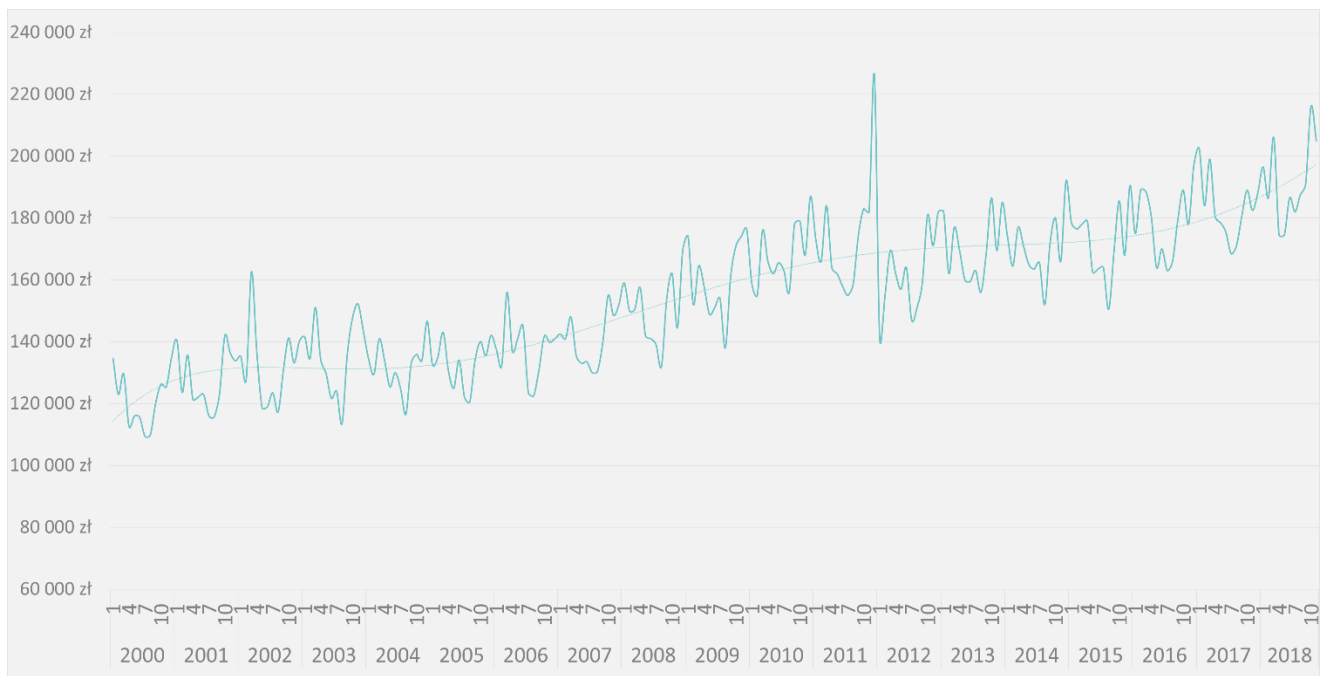
# PEX PharmaSequence monthly report - November 2018

## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



### Retail sales in PLN

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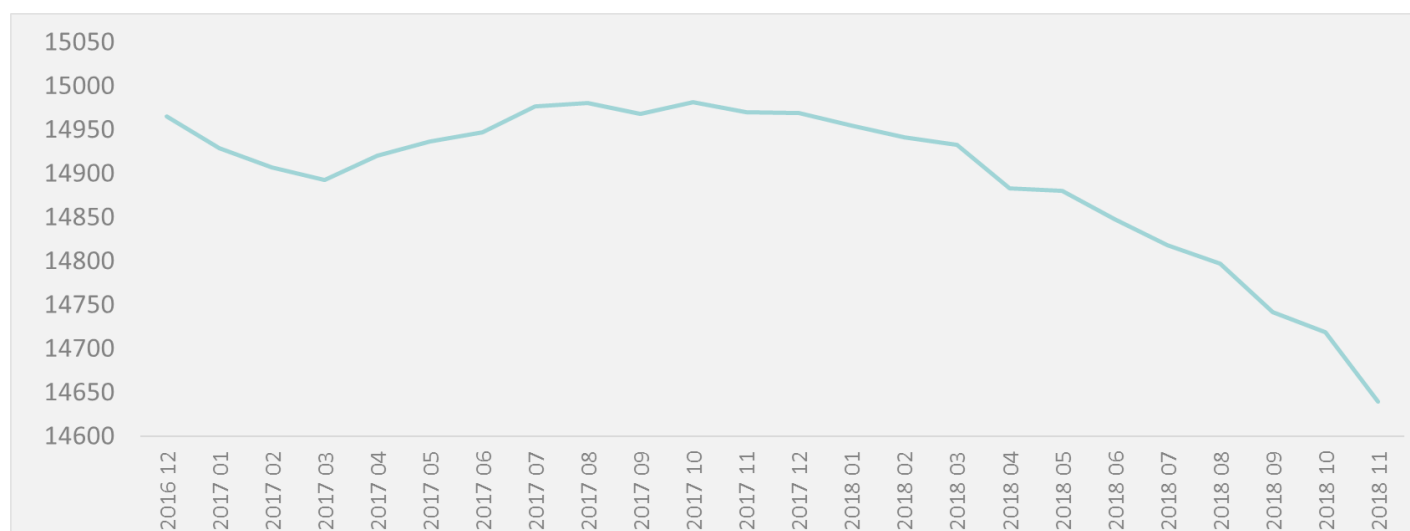
## PEX PharmaSequence monthly report - November 2018

### Average pharmacy

	November'18	YTD'2018	October'18		Change		November'17		Change		YTD'2017	Change	
			Value	%	Value	%	Value	%	Value	%			
<b>Total turnover (thousand PLN)</b>													
Total open market <sup>1</sup>	205	2 106	216	-11,0	-5,1%	183	22,5	12,3%	2 012	94,5	4,7%		
Rx reimbursed <sup>2</sup>	72	746	76	-4,5	-5,9%	65	7,3	11,3%	712	34,1	4,8%		
Rx nonreimbursed <sup>3</sup>	45	459	47	-2,3	-5,0%	41	3,9	9,5%	446	13,2	3,0%		
Non Rx products <sup>4</sup>	87	884	91	-4,0	-4,3%	76	11,1	14,6%	839	45,1	5,4%		
<b>Average price<sup>5</sup> per pack (PLN)</b>													
Total <sup>1</sup>	21,1	20,8	21,2	-0,02	-0,1%	20,5	0,7	3,3%	20,3	0,5	2,7%		
For reimbursed Rx products <sup>2</sup>	28,0	28,0	28,3	-0,3	-1,0%	27,6	0,4	1,6%	27,4	0,5	1,9%		
For nonreimbursed products <sup>3</sup>	25,7	25,3	25,9	-0,2	-0,9%	25,0	0,6	2,5%	24,6	0,7	3,0%		
For Non Rx products <sup>4</sup>	16,1	15,7	16,0	0,1	0,5%	15,4	0,8	5,0%	15,2	0,5	3,6%		
<b>Average mark-up*</b>													
Total <sup>1</sup>	24,9%	25,01%	25,0%	-0,1%	-0,5%	24,8%	0,0%	0,2%	25,2%	-0,2%	-0,8%		
For reimbursed Rx products <sup>2</sup>	19%	18,6%	18,7%	0,1%	0,7%	18,2%	0,6%	3,4%	18,5%	0,1%	0,6%		
For nonreimbursed Rx products <sup>3</sup>	22%	23,0%	22,2%	-0,2%	-0,8%	24,4%	-2,4%	-9,7%	24,8%	-1,8%	-7,4%		
For Non Rx products <sup>4</sup>	30%	29,5%	29,9%	-0,3%	-1,0%	29,1%	0,6%	1,9%	29,4%	0,1%	0,2%		
<b>Number of patients</b>													
Total <sup>1</sup>	3 770	39 870	4 010	-240	-6,0%	3 430	340	9,9%	39 510	360	0,9%		
For reimbursed Rx products <sup>2</sup>	750	7 850	800	-50	-6,3%	700	50	7,1%	7 830	20	0,3%		
For nonreimbursed Rx products <sup>3</sup>	780	8 170	830	-50	-6,0%	760	20	2,6%	8 590	-420	-4,9%		
For Non Rx products <sup>4</sup>	3 130	33 170	3 330	-200	-6,0%	2 830	300	10,6%	32 720	450	1,4%		
<b>Number of pharmacies - summary<sup>#</sup></b>													
	14 639	14 832	14 718	-79	-0,5%	14 970	-331	-2,2%	14 946	-114	-0,8%		

\*Values in „Change – value” for average mark-up in percentage points  
<sup>#</sup> Number of pharmacies based on PEX's analysis.

### - Pharmacies on the open market -



#### Retail sales in PLN

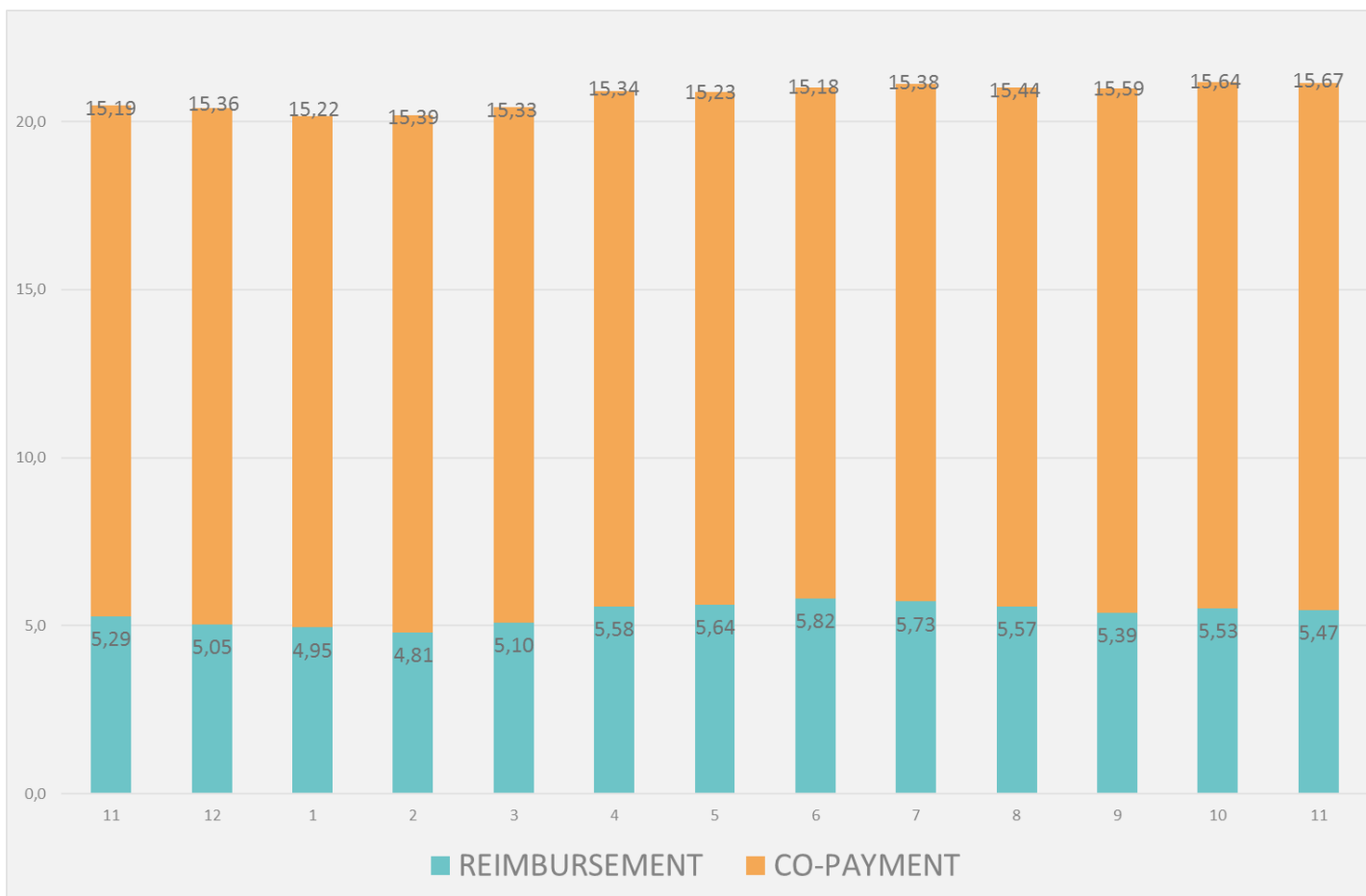
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## Price

- Structure of the average retail price<sup>5</sup> -



All amounts are retail open pharmacy sales in PLN

Most important terms:

<sup>1</sup> Total open pharmacy market sales

<sup>2</sup> Total sales of Rx products covered by NHF reimbursement

<sup>3</sup> Total sales of Rx products not covered by NHF reimbursement

<sup>4</sup> Total sales of products available without prescription, including OTC medicines, food supplements, herbs, patches, medical devices, etc.

<sup>5</sup> The calculation of the average price is based on products categorized and included in the pharmacy data database operated by PEX PharmaSequence and Kamsoft (Omnibus) – they make up 97% of the pharmacy market. For consistency in comparisons, the average prices since January of 2016 have been recalculated.

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## PEX PharmaSequence monthly report - November 2018

### PEX PharmaSequence commentary

**The pharmacy market** in November 2018 saw sales go close to 3 012m PLN. Value of sales compared to November 2017 grew by over 258m PLN (+9,4%). Compared to October of 2018, sales fell by approximately 168m PLN (-5,3%).

**Compared to the same period of 2017** the value of tracked segments was growing. The non-prescription segment grew by 133m PLN (+11,6%). Sales based on non-reimbursed prescriptions grew by approximately 40,5m PLN (+6,6%) and on reimbursed prescriptions grew by 81,5m PLN (+8,4%).

**Compared to the previous month**, value of tracked segments was falling. Value of products sold without a prescription was smaller by approximately 60,5m PLN (-4,5%), the value of non-reimbursed prescriptions was lower by almost 36m PLN (-5,2%) and of reimbursed Rx drugs fell by over 68 PLN (-6,1%).

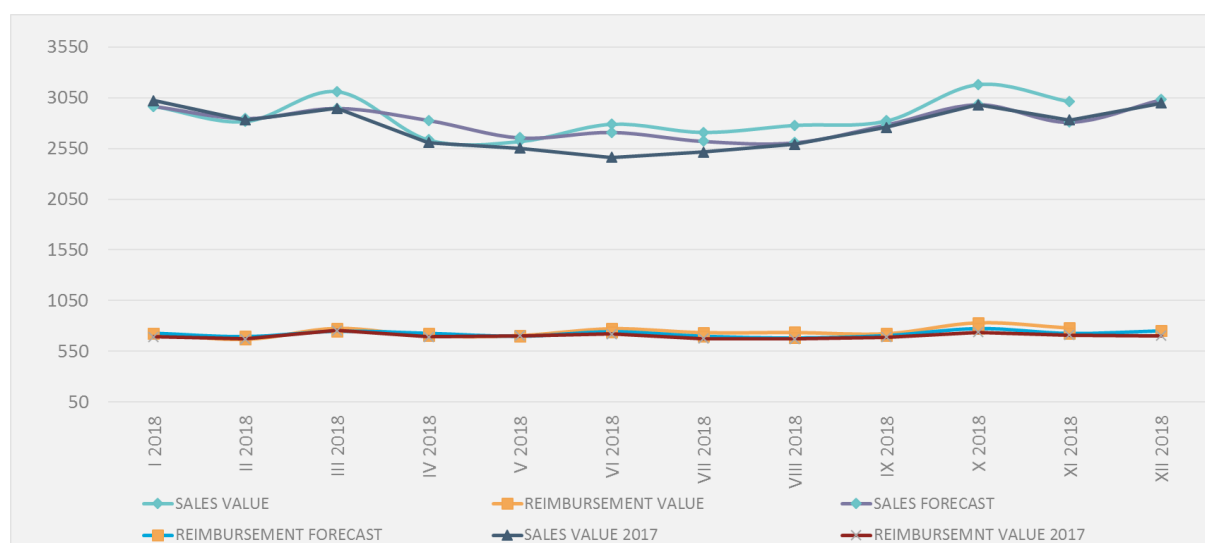
**Average pharmacy margin** for all drugs in November 2018 was 24,9% and was larger by about 0,5pp than the margin in the same period of 2017. Compared to October of 2018, the average pharmacy margin fell by approximately 0,5% (-0,1pp).

**The average retail drug price** in November 2018 was approximately 21 PLN and was 0,1% smaller than in the previous month, and 3,3% higher than the average price in November of 2017. The average retail price of reimbursed prescriptions was 28 PLN (+1,6% vs November 2017), 25,7 PLN for non-reimbursed prescriptions (+2,5% vs November 2017) and 16 PLN for products sold without a prescription (+5% vs November 2017).

**Drug reimbursement** by the National Health Fund in November was in the amount over 779m PLN, 9,6% more than in the same period of 2017. The level of patient copayment for reimbursed drugs in November was 26,4%, lower by 0,5 pp. compared to November 2017. Patient copayment for reimbursed drugs grew by over 0,3 pp compared to the previous month.

**Forecast:** By the end of 2018 sales of the entire pharmaceutical market will amount to above 34,5bn PLN, almost 5% more than in 2017. The estimated value of reimbursement will be close to 9bn PLN (+6,2% compared to 2017).

- Monthly turnover value forecast (PLN million, retail gross prices) -



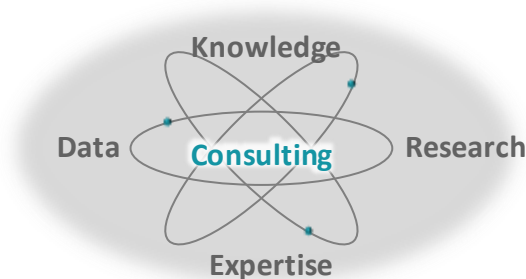
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### About us

**PEX PharmaSequence** is a Polish **consulting and research** company with its own wide-ranging resources of market data. We specialize in services for entities operating in the broadly defined healthcare market.

As a result of numerous projects, carried out over **almost 20 years** of the company's operations on the Polish market, for innovative, generic, and OTC producers, PEX PharmaSequence has gained unique expertise that allows us to provide our Clients with valuable support.



It is not without significance that our team, comprising **60+ people**, has the benefit of experience gained in service companies specializing in the pharma sector, as well as industry experience acquired in local and global pharmaceutical companies.

**Our expertise and competencies** as well as our **knowledge of the Polish pharma** market enable us to develop proposals and efficiently carry out projects, which offer added value to our Clients' business decisions.

### We would like to hear from you!

[www.pexps.pl](http://www.pexps.pl) more info

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Published on the 18th of December 2018, prepared by Błażej Górniak, Marketing Specialist based on PEX PharmaSequence data.

