



# PEX PharmaSequence monthly report - August 2019

## Total open market (sell-out report)

	August 2019	Change in comparison to			Cumulative YTD		Forecast		
		July 2019	January 2019	August 2018	2019	Change vs 2018	2019	Change vs 2018	Change vs 2017
<b>Total turnover (PLN million)</b>									
Total open market <sup>1</sup>	<b>2 842</b>	-6.7%	-14.0%	2.3%	24 160	7.7%	36 413	5.3%	10.4%
Rx reimbursed <sup>2</sup>	<b>989</b>	-9.2%	-8.4%	0.8%	8 318	4.2%	12 487	2.5%	7.0%
Rx nonreimbursed <sup>3</sup>	<b>652</b>	-7.8%	-7.3%	5.6%	5 402	10.1%	8 114	8.1%	11.7%
Non Rx products <sup>4</sup>	<b>1 178</b>	-3.7%	-21.2%	1.5%	10 250	9.4%	15 521	6.1%	12.2%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>740</b>	-10.2%	-7.4%	0.4%	6 229	6.8%	9 369	4.9%	11.3%
Reimbursement share in total turnover	<b>26.0%</b>	-3.7%	7.8%	-1.8%	25.8%	-0.8%	25.7%	-0.4%	0.8%
Reimbursement share in reimbursed sales	<b>73.7%</b>	-0.9%	1.3%	-0.6%	73.8%	2.1%	73.8%	1.9%	3.7%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>21.7</b>	-0.4%	3.9%	3.1%	21.1	0.4%	21.0	0.9%	3.7%
For reimbursed Rx products <sup>2</sup>	<b>28.2</b>	0.2%	1.1%	1.2%	28.2	1.2%	28.8	2.8%	4.8%
For nonreimbursed Rx products <sup>3</sup>	<b>26.9</b>	1.4%	5.0%	5.9%	26.9	5.9%	26.1	2.7%	6.0%
For Non Rx products <sup>4</sup>	<b>16.5</b>	0.4%	1.4%	4.5%	16.5	4.5%	16.2	2.5%	6.3%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>24.8%</b>	2.2%	0.1%	-1.4%	24.6%	-1.5%	24.6%	-1.6%	-2.5%
For reimbursed Rx products <sup>2</sup>	<b>19.2%</b>	1.5%	0.4%	2.6%	19.0%	2.6%	18.9%	1.1%	1.9%
For nonreimbursed Rx products <sup>3</sup>	<b>20.8%</b>	1.2%	0.4%	-9.3%	20.8%	-10.5%	21.0%	-8.0%	-15.2%
For Non Rx products <sup>4</sup>	<b>29.8%</b>	3.0%	3.4%	-0.9%	29.3%	-0.4%	28.8%	-2.3%	-2.1%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>3 650</b>	-4.5%	-13.1%	2.8%	30 280	6.4%	45 550	4.0%	5.7%
Total turnover (PLN thousand) <sup>1</sup>	<b>202</b>	-6.3%	-11.0%	7.5%	1 686	12.9%	2 563	10.5%	16.5%

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

2019	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 2018	Total	Change vs 2018	Total	Change vs 2018
January	3 307	11.4%	1 079	6.1%	704	14.9%	1 495	14.0%
February	6 359	9.9%	2 097	7.5%	1 361	11.9%	2 851	10.7%
March	9 462	6.4%	3 156	4.3%	2 045	8.8%	4 191	6.7%
April	12 457	8.0%	4 196	5.4%	2 719	10.0%	5 447	9.1%
May	15 427	9.0%	5 248	6.3%	3 397	11.1%	6 663	10.1%
June	18 271	7.8%	6 240	3.6%	4 042	9.8%	7 849	10.4%
July	21 318	8.5%	7 329	4.7%	4 750	10.8%	9 072	10.5%
August	24 160	7.7%	8 318	4.2%	5 402	10.1%	10 250	9.4%
September								
October								
November								
December								

### Retail sales in PLN

PEX PharmaSequence Sp. z o.o.,  
 ul. Kłobucka 23, 02-699 Warszawa  
 tel. 022-886-47-15, fax. 022-638-21-29  
 e-mail: biuro@pexps.pl  
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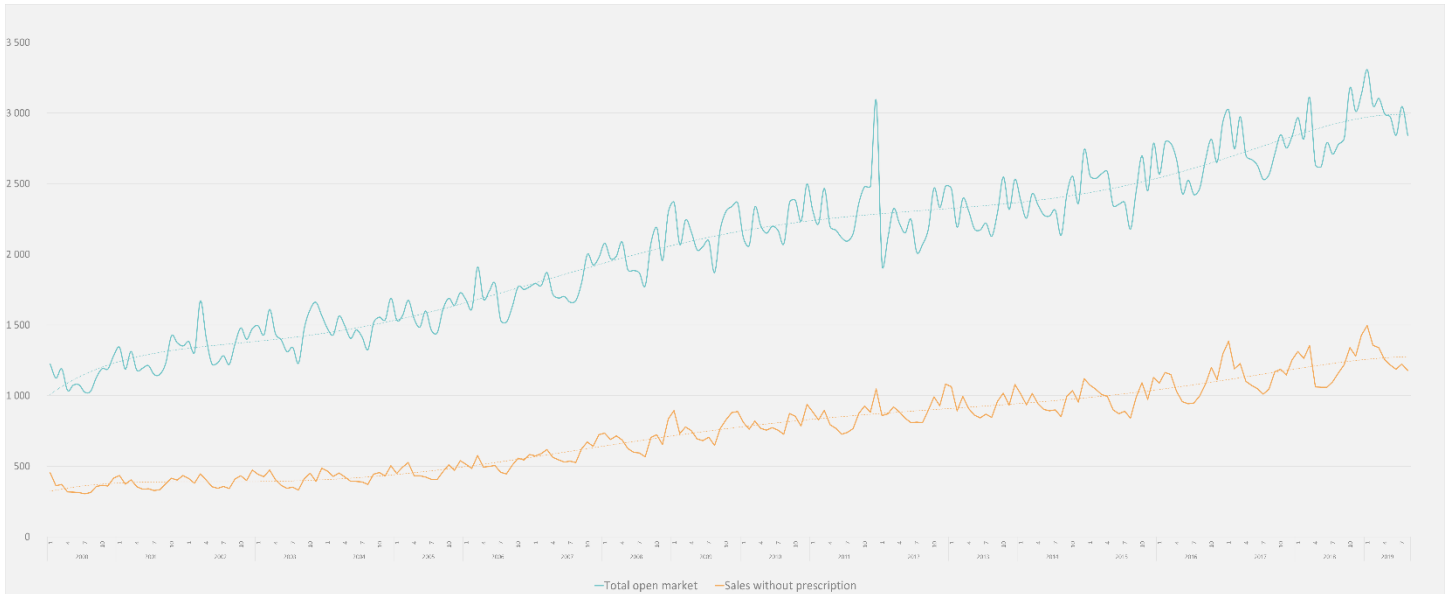
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 1 000 000 zł.



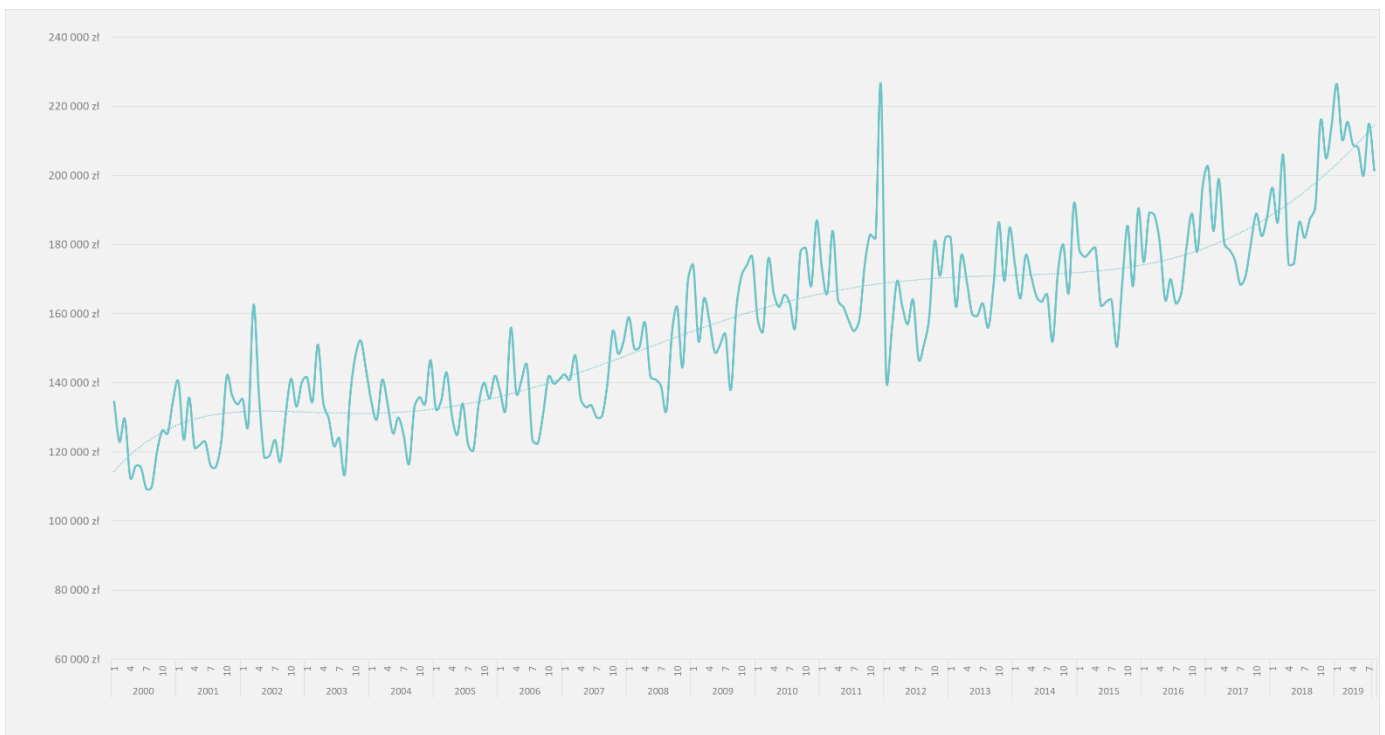
# PEX PharmaSequence monthly report - August 2019

## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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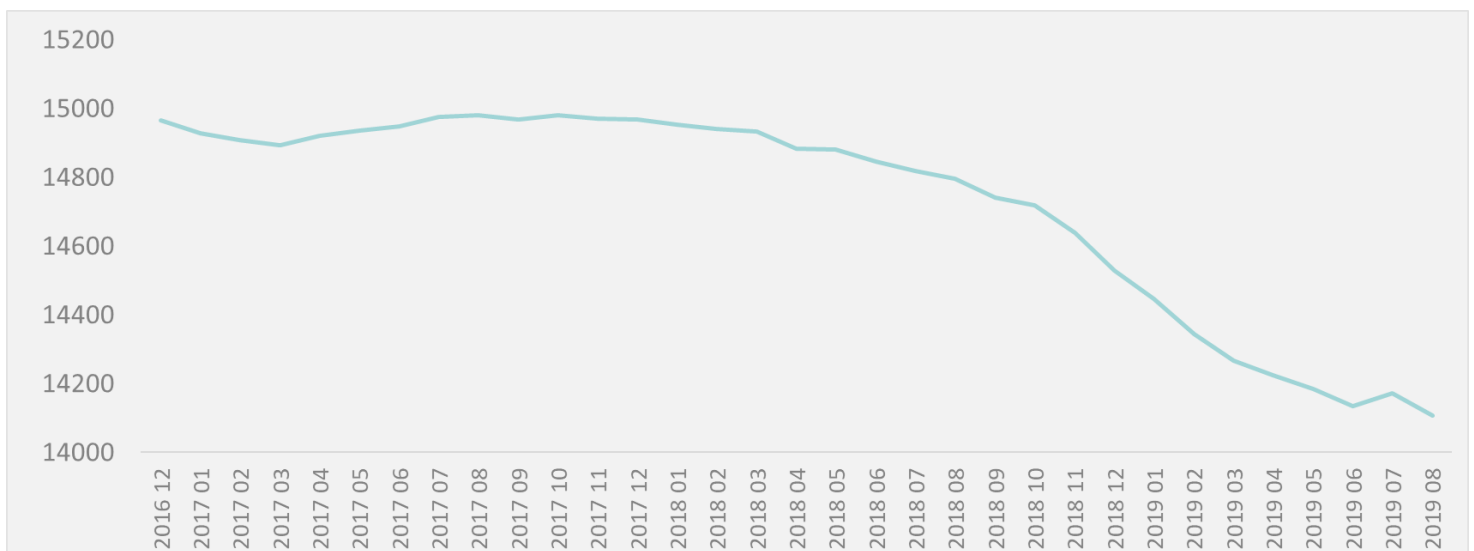
### Average pharmacy

	August'19	YTD'2019	July'19	Change		August'18	Change		YTD'2018	Change	
				Value	%		Value	%		Value	%
<b>Total turnover (thousand PLN)</b>											
Total open market <sup>1</sup>	202	1 686	215	-13.5	-6.3%	188	14.0	7.5%	1 494	192.0	12.9%
Rx reimbursed <sup>2</sup>	70	581	77	-6.8	-8.8%	66	3.9	6.0%	532	48.9	9.2%
Rx nonreimbursed <sup>3</sup>	46	377	50	-3.7	-7.4%	42	4.6	11.0%	327	50.4	15.4%
Non Rx products <sup>4</sup>	84	715	86	-2.8	-3.2%	78	5.2	6.7%	624	91.2	14.6%
<b>Average price<sup>5</sup> per pack (PLN)</b>											
Total <sup>1</sup>	21.7	21.4	21.8	-0.08	-0.4%	21.0	0.7	3.1%	20.7	0.7	3.2%
For reimbursed Rx products <sup>2</sup>	28.2	28.2	28.1	0.1	0.2%	27.8	0.3	1.2%	27.9	0.3	1.1%
For nonreimbursed products <sup>3</sup>	26.9	26.2	26.5	0.4	1.4%	25.4	1.5	5.9%	25.2	1.0	4.1%
For Non Rx products <sup>4</sup>	16.5	16.3	16.4	0.1	0.4%	15.8	0.7	4.5%	15.6	0.7	4.6%
<b>Average mark-up*</b>											
Total <sup>1</sup>	24.8%	24.61%	24.3%	0.5%	2.2%	25.2%	-0.4%	-1.4%	25.0%	-0.4%	-1.5%
For reimbursed Rx products <sup>2</sup>	19%	19.0%	18.9%	0.3%	1.5%	18.7%	0.5%	2.6%	18.6%	0.4%	2.1%
For nonreimbursed Rx products <sup>3</sup>	21%	20.8%	20.6%	0.3%	1.2%	23.0%	-2.1%	-9.3%	23.1%	-2.3%	-10.0%
For Non Rx products <sup>4</sup>	30%	29.3%	29.0%	0.9%	3.0%	30.1%	-0.3%	-0.9%	29.5%	-0.2%	-0.7%
<b>Number of patients</b>											
Total <sup>1</sup>	3 650	30 280	3 820	-170	-4.5%	3 550	100	2.8%	28 460	1820	6.4%
For reimbursed Rx products <sup>2</sup>	710	6 040	790	-80	-10.1%	690	20	2.9%	5 620	420	7.5%
For nonreimbursed Rx products <sup>3</sup>	750	6 180	810	-60	-7.4%	710	40	5.6%	5 850	330	5.6%
For Non Rx products <sup>4</sup>	3 000	25 100	3 100	-100	-3.2%	2 930	70	2.4%	23 670	1430	6.0%
<b>Number of pharmacies - summary<sup>#</sup></b>											
	14 106	14 235	14 171	-65	-0.5%	14 797	-691	-4.7%	14 882	-647	-4.3%

\*Values in „Change – value“ for average mark-up in percentage points

# Number of pharmacies based on PEX's analysis.

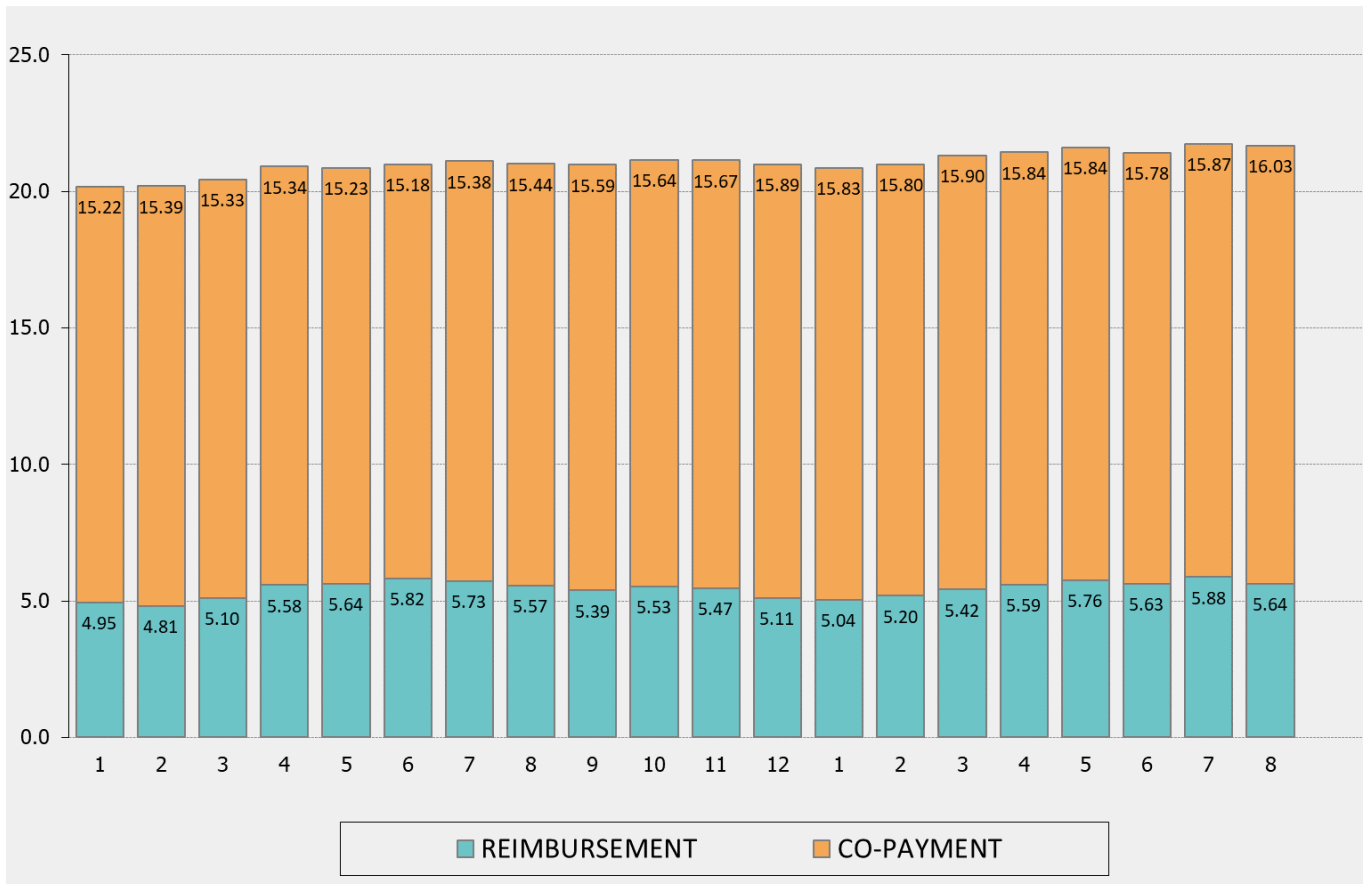
### - Pharmacies on the open market -



# PEX PharmaSequence monthly report - August 2019

## 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.

# PEX PharmaSequence monthly report - August 2019

## PEX PharmaSequence commentary

**The pharmacy market** in August 2019 saw sales go close to 2 842.4m PLN. Value of sales compared to August 2018 grew by over 63m PLN (+2.3%). Compared to July of 2019, sales fell by approximately 204.4m PLN (-6.7%).

**Compared to the same period of 2018** the value of tracked segments grew for all monitored segments. Sales based on non-reimbursed prescriptions grew by 652.3m PLN (+5.6%), the non-prescription segment grew by 17.9m PLN (+1.5%), sales based on reimbursed prescriptions grow by 8.1m PLN (+0.8%).

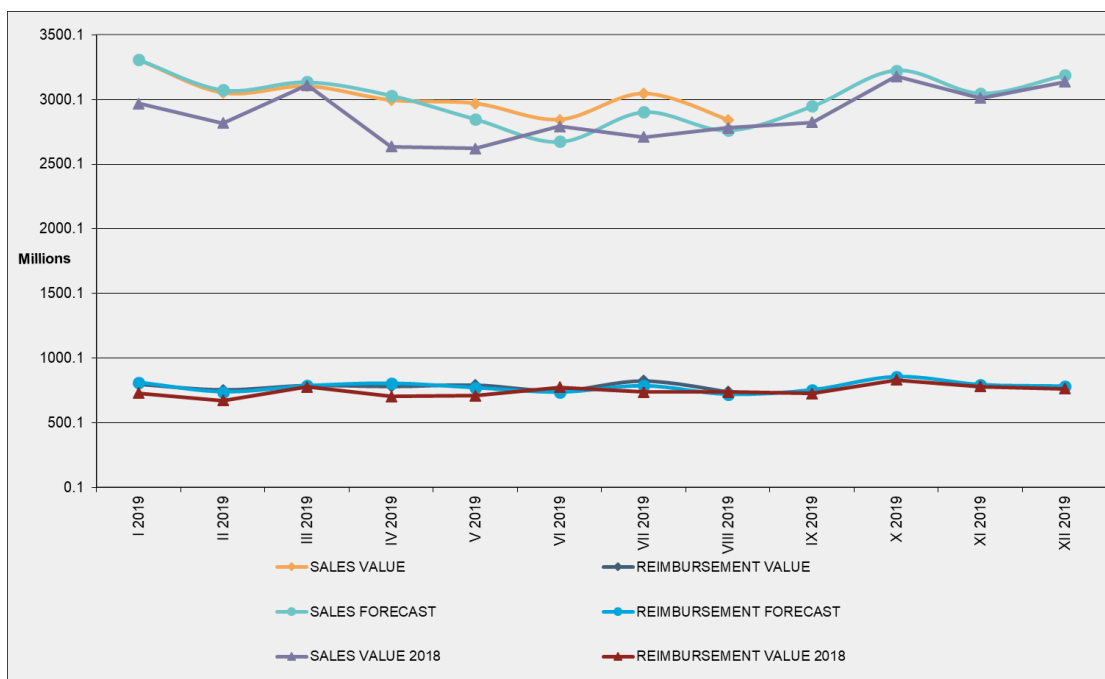
**Compared to the previous month**, value of sales fell for all monitored segments. Value of reimbursed prescriptions was lower by 100.3m PLN (-9.2%), value of non-reimbursed Rx drugs fell by 55.5m PLN (-7.8%) and value of products sold without a prescription fell by 44.7m PLN (-3.7%).

**The average retail drug price** in August 2019 was 21.7 PLN and was 0.4% lower than in the previous month, and 3.1% higher than the average price in August 2018. The average retail price of reimbursed prescriptions was 28.2 PLN (+1.2% vs August 2018), 26.9 PLN for non-reimbursed prescriptions (+5.9% vs August 2018) and 16.5 PLN for products sold without a prescription (+4.5% vs August 2018).

**Average pharmacy margin** for all drugs in August 2019 was 24.8% and was lower by about 1.4% than the margin in the same period of 2018. Compared to July 2019, the average pharmacy margin was higher by 2.2%.

**Drug reimbursement** by the National Health Fund in August was in the amount almost 740m PLN, 5.3% more than in the same period of 2018. The level of patient copayment for reimbursed drugs in August was 25.2%, higher by 0.6pp. compared to previous month.

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

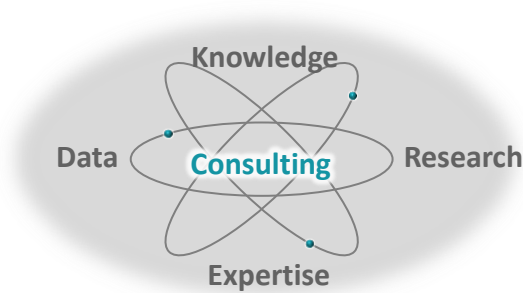


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### About us

**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!

A grey rounded rectangular box containing contact information. At the top left is a bar chart icon. To its right is the text "www.pexps.pl more info". Below this is a person icon with question marks above their head and an envelope icon below. To the right of these icons is the text "Ask us a question:", "solutions\_by\_pex@pexps.pl", and "22 886 47 15".

Published on the 18th of August 2019, prepared by Marta Mazurek, Analyst based on PEX PharmaSequence data.

