



Warszawa, 30.05.2022

## MONTHLY REPORT – APRIL 2022

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## TOTAL OPEN MARKET (SELL-OUT REPORT)

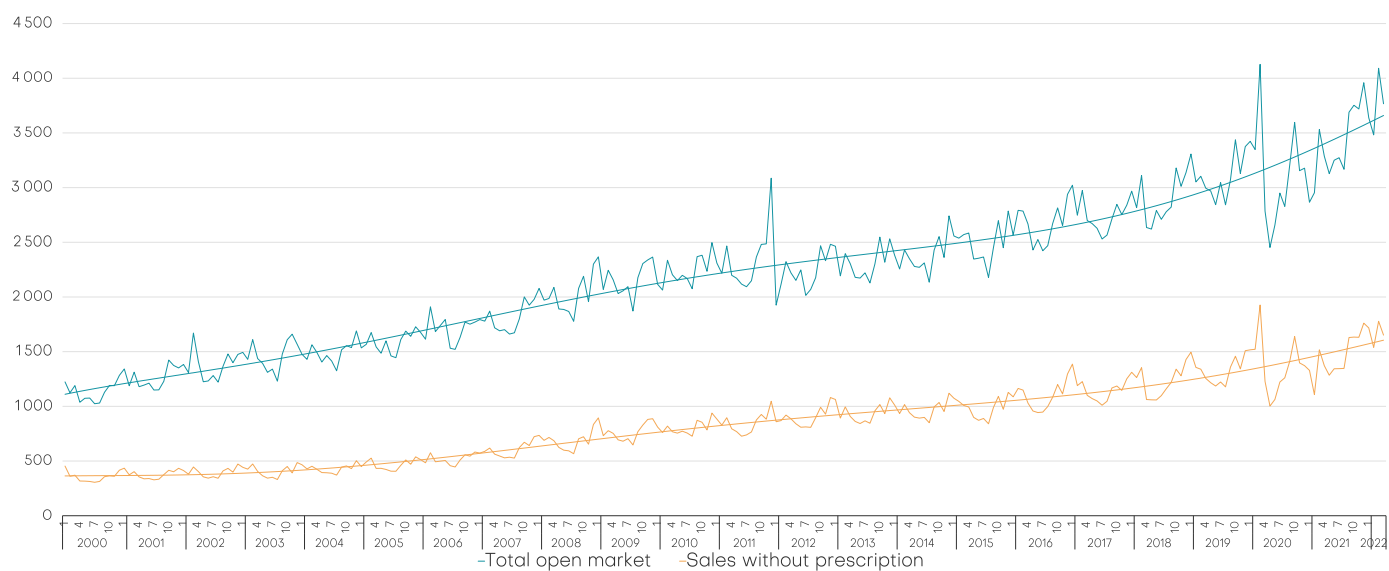
	APRIL 2022	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		MARCH 2022	JANUARY 2022	APRIL 2021	2022	CHANGE VS 2021
<b>TOTAL TURNOVER (PLN MILLION)</b>						
Total open market <sup>1</sup>	3 767	-7.9%	3.5%	14.6%	14 979	18.5%
Rx reimbursed <sup>2</sup>	1 097	-10.4%	8.4%	2.2%	4 373	8.7%
Rx nonreimbursed <sup>3</sup>	985	-6.8%	12.3%	21.1%	3 791	19.2%
Non Rx products <sup>4</sup>	1 651	-7.1%	-3.8%	20.4%	6 686	25.5%
<b>REIMBURSEMENT</b>						
Reimbursement value (PLN million)	827	-10.6%	8.1%	1.7%	3 296	8.5%
Reimbursement share in total turnover	22.0%	-2.9%	4.5%	-11.2%	22.0%	-8.5%
Reimbursement share in reimbursed sales	74.0%	-0.5%	0.0%	-0.6%	74.0%	-0.2%
<b>AVERAGE PRICE PER PACK (PLN)</b>						
Total <sup>1</sup>	25.2	2.2%	3.5%	5.2%	24.3	9.5%
For reimbursed Rx products <sup>2</sup>	30.7	0.4%	2.6%	2.4%	30.1	0.5%
For nonreimbursed Rx products <sup>3</sup>	32.7	1.7%	4.1%	7.2%	31.3	2.7%
For Non Rx products <sup>4</sup>	20.1	3.8%	1.2%	9.0%	19.2	4.0%
<b>AVERAGE MARK-UP</b>						
Total <sup>1</sup>	25.1%	-1.0%	-1.4%	2.5%	25.3%	3.1%
For reimbursed Rx products <sup>2</sup>	17.3%	-7.1%	-2.5%	-5.7%	18.0%	-2.9%
For nonreimbursed Rx products <sup>3</sup>	22.1%	-4.1%	2.1%	0.8%	22.3%	1.5%
For Non Rx products <sup>4</sup>	29.1%	-1.8%	-0.6%	1.2%	29.4%	3.2%
<b>AVERAGE PHARMACY</b>						
Number of patients in pharmacies	4 310	-5.3%	3.1%	23.5%	16 980	20.5%
Total turnover (PLN thousand) <sup>1</sup>	289	-7.8%	4.1%	17.2%	1 147	21.2%

## TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

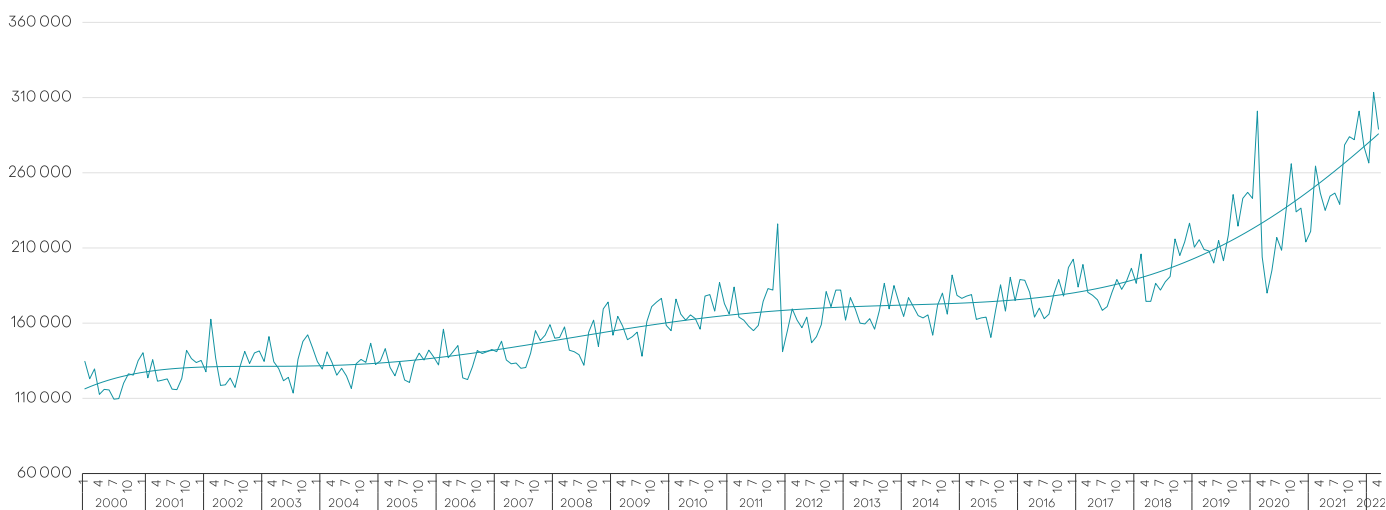
2022	PHARMACY MARKET TOTAL <sup>1</sup>		RX REIMBURSED PRESCRIPTIONS <sup>2</sup>		RX NONREIMBURSED PRESCRIPTIONS <sup>3</sup>		NON RX PRODUCTS <sup>4</sup>	
	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021
January	3 639	26.9%	1 012	18.6%	877	33.5%	1 717	29.2%
February	7 120	22.4%	2 053	12.6%	1 749	16.0%	3 256	33.6%
March	11 212	19.9%	3 276	11.1%	2 806	18.6%	5 034	27.3%
April	14 979	18.5%	4 373	8.7%	3 791	19.2%	6 686	25.5%
May								
June								
July								
August								
September								
October								
November								
December								

## TRENDS

### TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



### TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN



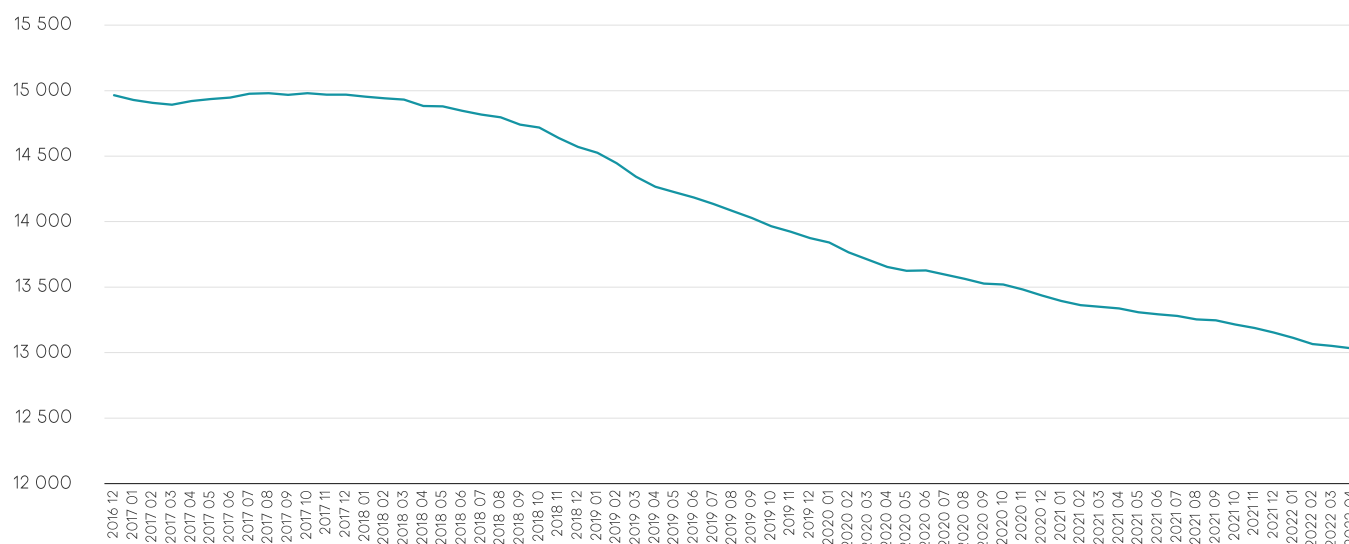
## AVERAGE PHARMACY

	APRIL'22	YTD'2021	MARCH'22	CHANGE		APRIL'21	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
<b>TOTAL TURNOVER (THOUSAND PLN)</b>											
Total open market <sup>1</sup>	289	1 147	314	-24.5	-7.8%	247	42.5	17.2%	946	200.5	21.2%
Rx reimbursed <sup>2</sup>	84	335	94	-9.6	-10.2%	80	3.7	4.6%	301	33.6	11.2%
Rx nonreimbursed <sup>3</sup>	76	290	81	-5.4	-6.7%	61	14.6	23.9%	238	52.1	21.9%
Non Rx products <sup>4</sup>	127	512	136	-9.6	-7.0%	103	23.8	23.2%	399	113.1	28.4%
<b>AVERAGE PRICE<sup>5</sup> PER PACK (PLN)</b>											
Total <sup>1</sup>	25	25	24.6	0.5	2.2%	23.9	1.2	5.2%	23.7	1.0	4.1%
For reimbursed Rx products <sup>2</sup>	31	30	30.6	0.1	0.4%	30.0	0.7	2.4%	29.6	0.8	2.6%
For nonreimbursed Rx products <sup>3</sup>	33	32	32.1	0.5	1.7%	30.5	2.2	7.2%	30.1	1.9	6.4%
For Non Rx products <sup>4</sup>	20	20	19.4	0.7	3.8%	18.4	1.7	9.0%	18.4	1.3	7.1%
<b>AVERAGE MARK-UP*</b>											
Total <sup>1</sup>	25.1%	25.4%	25.4%	-0.3%	-1.0%	24.5%	0.6%	2.5%	24.6%	0.8%	3.2%
For reimbursed Rx products <sup>2</sup>	17.3%	18.0%	18.6%	-1.3%	-7.1%	18.3%	-1.0%	-5.7%	18.5%	-0.5%	-2.9%
For nonreimbursed Rx products <sup>3</sup>	22.1%	22.3%	23.1%	-1.0%	-4.1%	21.9%	0.2%	0.8%	22.0%	0.4%	1.6%
For Non Rx products <sup>4</sup>	29.1%	29.4%	29.6%	-0.5%	-1.8%	28.7%	0.3%	1.2%	28.5%	0.9%	3.1%
<b>NUMBER OF PATIENTS</b>											
Total <sup>1</sup>	4 310	16 980	4 550	-240	-5.3%	3 490	820	23.5%	14 090	2 890	20.5%
For reimbursed Rx products <sup>2</sup>	990	3 660	1 050	-60	-5.7%	850	140	16.5%	3 290	370	11.2%
For nonreimbursed Rx products <sup>3</sup>	950	3 690	1 000	-50	-5.0%	810	140	17.3%	3 110	580	18.6%
For Non Rx products <sup>4</sup>	3 470	13 840	3 660	-190	-5.2%	2 840	630	22.2%	11 430	2 410	21.1%
<b>NUMBER OF PHARMACIES - SUMMARY<sup>#</sup></b>											
	13 033	13 066	13 051	-18	-0.1%	13 337	-286	-2.1%	13 361	-296	-2.2%

\* Wartości w kolumnach „Zmiana-Wartość” dla średniej marży podane w punktach procentowych

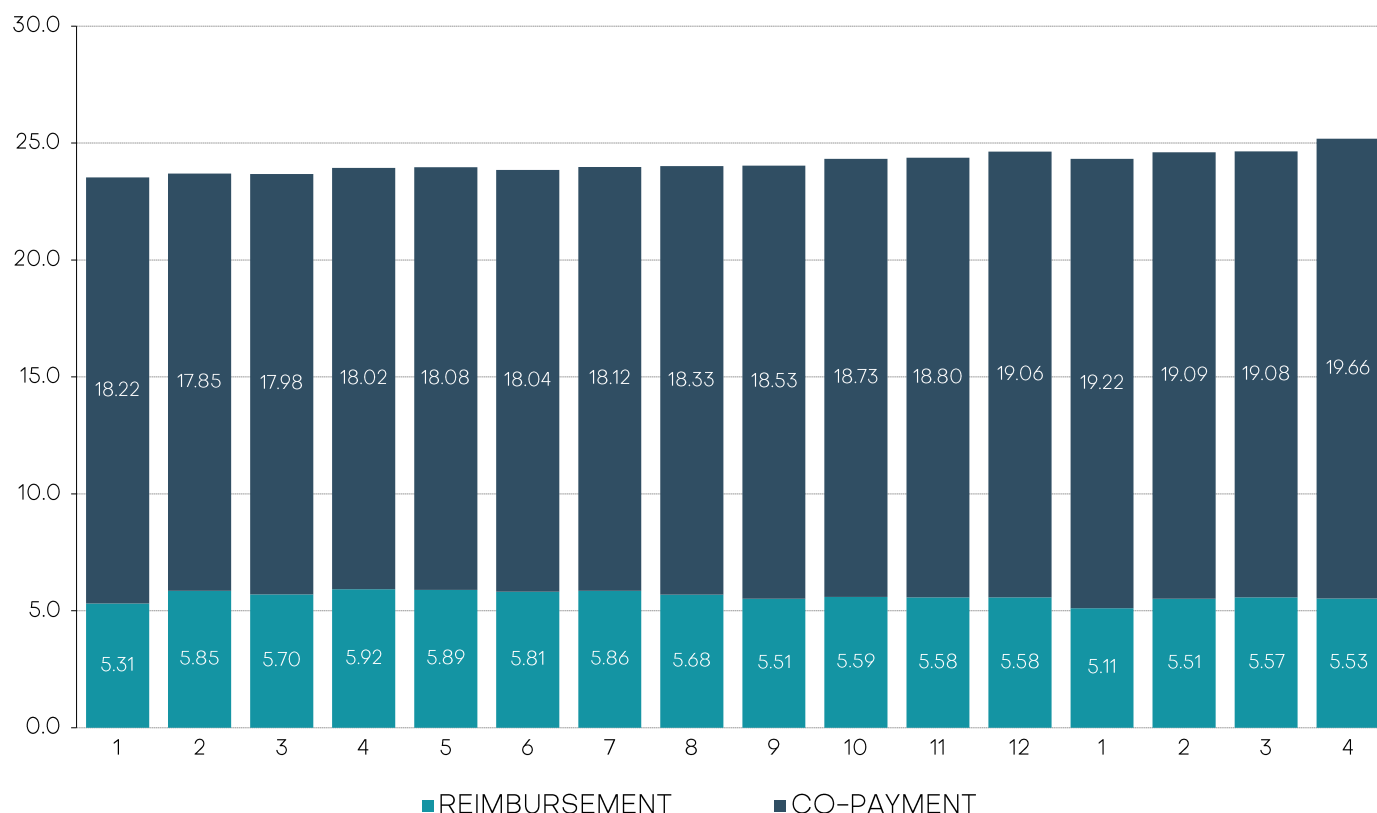
# Liczba aptek opracowana na podstawie analizy PEX PharmaSequence

## PHARMACIES ON THE OPEN MARKET



## 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.

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## PEX PHARMASEQUENCE COMMENTARY

**The pharmacy market in April 2022** saw sales go close to 3766.5m PLN. Value of sales compared to April 2021 grew by 479m PLN (+14.6%). Compared to March of 2022, sales fell by approximately 325m PLN (-7.9%).

**Compared to the same period of 2021** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 23.7m PLN (+2.2%), sales based on non-reimbursed prescriptions grew by 171.4m PLN (+21.1%), the non-prescription segment grew by 279.3m PLN (+20.4%).

**Compared to the previous month**, the value of tracked segments fell for all monitored segments. Value of reimbursed prescriptions fell by 126.7m PLN (-10.4%), value of non-reimbursed RX drugs fell by 71.9m PLN (-6.8%) and value of products sold without a prescriptions fell by 127m PLN (-7.1%).

**The average retail drug price in April 2022** was 25.2 PLN and was 2.2% higher than the average price in the previous month, and 5.2% higher than the average price in April 2021. The average retail price of reimbursed prescription was 30.7 PLN (+2.4% vs April 2021), 32.7 PLN for non-reimbursed prescriptions (+7.2% vs April 2021) and 20.1 PLN for products sold without a prescription (+9% vs April 2021).

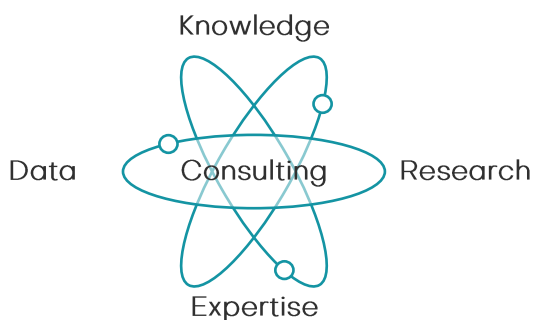
**Average pharmacy margin for all drugs in April 2022** was 25.1% and was higher by 2.5% than margin in the same period of 2021. Compared to March 2022, the average pharmacy margin was lower by 1%.

**Drug reimbursement by the National Health Fund in April** was in the amount 827m PLN, 1.7% more than in the same period of 2021. The level of patient copayment for reimbursed drugs in April was 22%, fell by 0.6p.p. compared to previous month.

## 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



**Ask us a question:**

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