



Warsaw, 29.07.2022

MONTHLY REPORT – JUNE 2022

TOTAL OPEN MARKET (SELL-OUT REPORT)

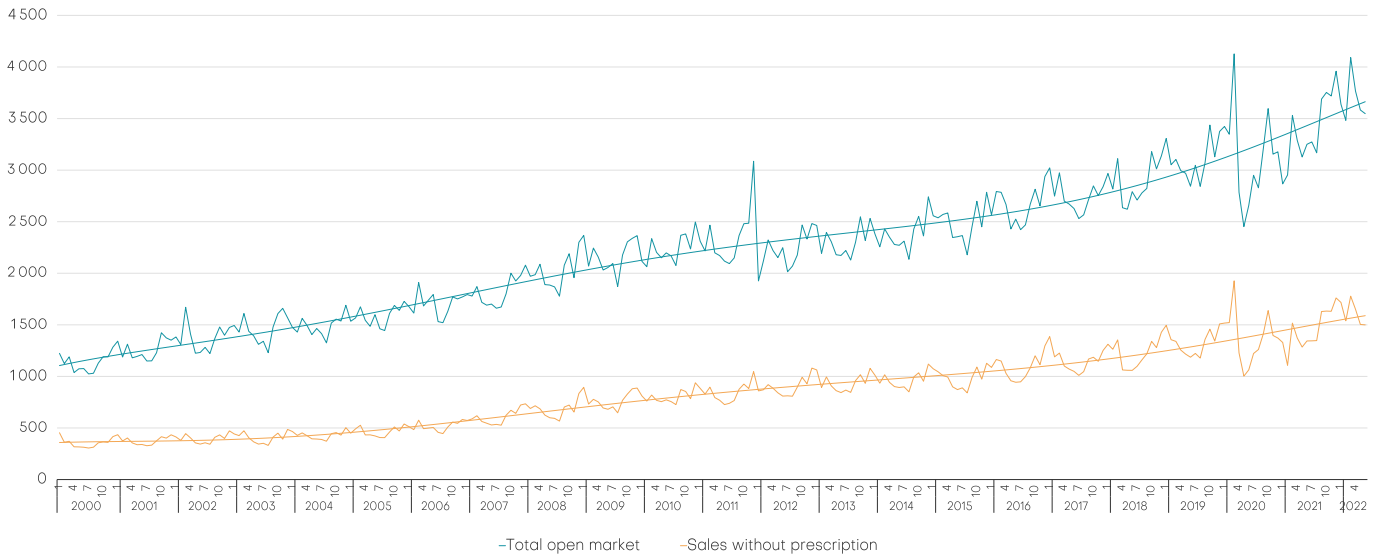
	JUNE 2022	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		MAY 2022	JANUARY 2022	JUNE 2021	2022	CHANGE VS 2021
TOTAL TURNOVER (PLN MILLION)						
Total open market ¹	3 548	-1.0%	-2.5%	9.2%	22 110	16.3%
Rx reimbursed ²	1 080	0.4%	6.7%	2.1%	6 528	7.0%
Rx nonreimbursed ³	936	-3.6%	6.7%	13.7%	5 698	18.8%
Non Rx products ⁴	1 500	-0.3%	-12.7%	11.6%	9 689	21.8%
REIMBURSEMENT						
Reimbursement value (PLN million)	817	0.6%	6.9%	3.2%	4 926	7.1%
Reimbursement share In total turnover	23.0%	1.6%	9.7%	-5.5%	22.3%	-7.9%
Reimbursement share In reimbursed sales	74.4%	0.3%	0.5%	0.9%	74.1%	0.1%
AVERAGE PRICE PER PACK (PLN)						
Total ¹	25.7	0.6%	5.5%	7.6%	24.6	10.0%
For reimbursed Rx products ²	30.6	0.5%	2.3%	2.9%	30.2	1.7%
For nonreimbursed Rx products ³	33.4	1.1%	6.4%	9.4%	31.7	4.0%
For Non Rx products ⁴	20.2	-0.2%	1.7%	9.7%	19.4	5.4%
AVERAGE MARK-UP						
Total ¹	25.3%	1.7%	-0.8%	1.2%	25.3%	2.6%
For reimbursed Rx products ²	18.0%	0.7%	1.6%	-3.9%	18.0%	-3.0%
For nonreimbursed Rx products ³	23.2%	2.7%	7.1%	2.7%	22.5%	1.8%
For Non Rx products ⁴	29.6%	1.8%	1.2%	0.7%	29.4%	2.7%
AVERAGE PHARMACY						
Number of patients in pharmacies	4 030	-2.2%	-3.6%	5.2%	25 130	17.0%
Total turnover (PLN thousand) ¹	273	-0.9%	-1.8%	11.5%	1 694	18.8%

TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

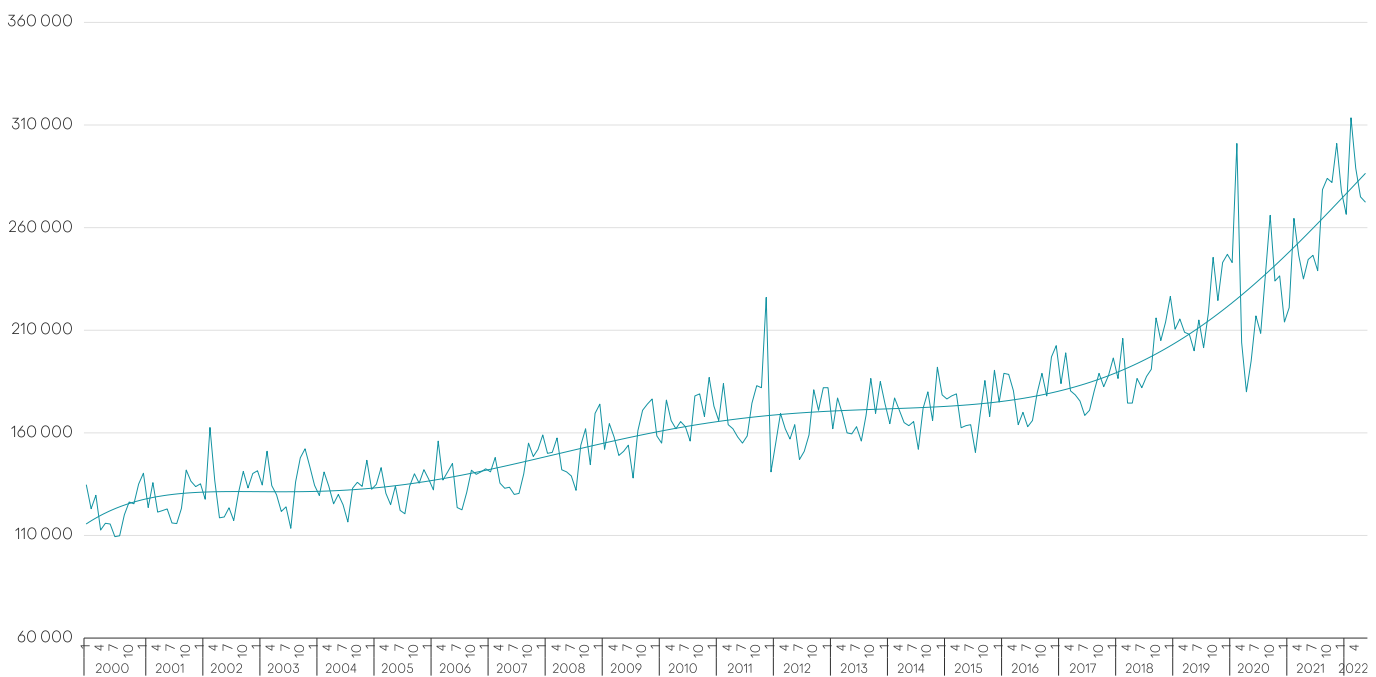
2022	PHARMACY MARKET TOTAL ¹		RX REIMBURSED PRESCRIPTIONS ²		RX NONREIMBURSED PRESCRIPTIONS ³		NON RX PRODUCTS ⁴	
	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021
January	3 639	26.9%	1 012	18.6%	877	33.5%	1 717	29.2%
February	7 120	22.4%	2 053	12.6%	1 749	16.0%	3 256	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	18 562	17.7%	5 449	8.0%	4 762	19.9%	8 190	23.9%
June	22 110	16.3%	6 528	7.0%	5 698	18.8%	9 689	21.8%
July								
August								
September								
October								
November								
December								

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN



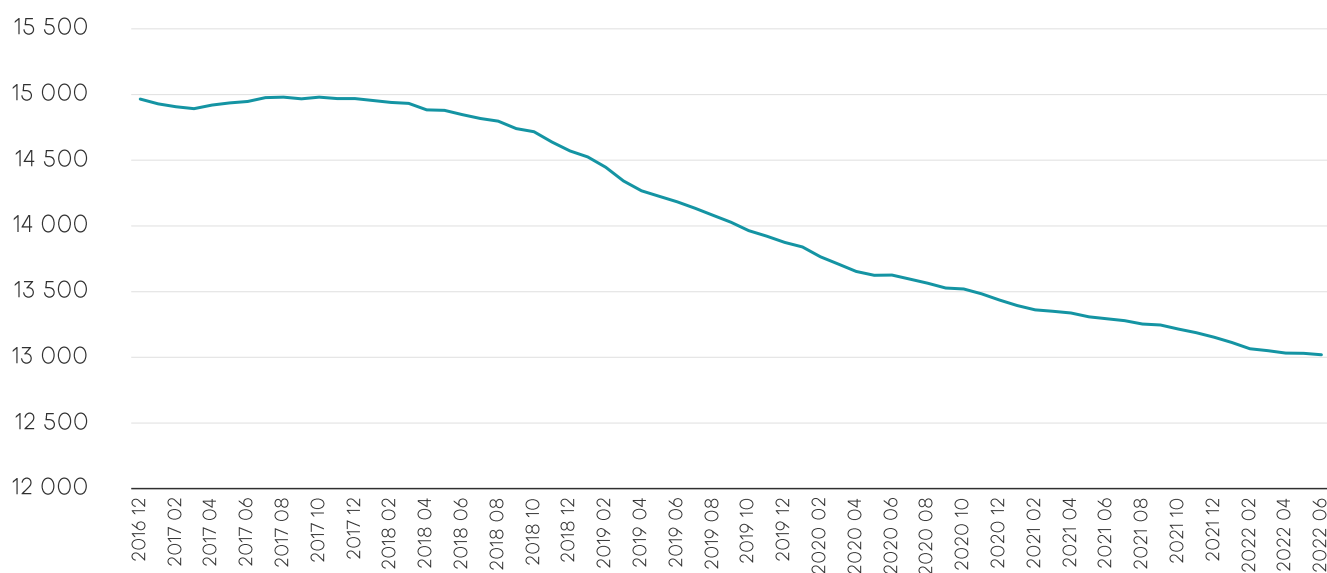
AVERAGE PHARMACY

	JUNE'22	YTD'2021	MAY'22	CHANGE		JUNE'21	CHANGE		YTD'2020	CHANGE		
				VALUE	%		VALUE	%		VALUE	%	
TOTAL TURNOVER (THOUSAND PLN)												
Total open market ¹	273	1 694	275	-2.5	-0.9%	245	28.0	11.5%	1 426	268.5	18.8%	
Rx reimbursed ²	83	500	83	0.4	0.5%	80	3.4	4.3%	457	42.8	9.4%	
Rx nonreimbursed ³	72	437	75	-2.6	-3.5%	62	10.0	16.1%	360	77.0	21.4%	
Non Rx products ⁴	115	742	115	-0.2	-0.2%	101	14.1	13.9%	596	146.1	24.5%	
AVERAGE PRICE⁵ PER PACK (PLN)												
Total ¹	26	25	25.5	0.1	0.6%	23.9	1.8	7.6%	23.8	1.2	5.1%	
For reimbursed Rx products ²	31	30	30.5	0.1	0.5%	29.7	0.9	2.9%	29.6	0.8	2.7%	
For nonreimbursed products ³	33	32	33.0	0.4	1.1%	30.5	2.9	9.4%	30.2	2.2	7.3%	
For Non Rx products ⁴	20	20	20.2	0.0	-0.2%	18.4	1.8	9.7%	18.5	1.4	7.8%	
AVERAGE MARK-UP*												
Total ¹	25.3%	25.3%	24.9%	0.4%	1.7%	25.0%	0.3%	1.2%	24.6%	0.7%	2.7%	
For reimbursed Rx products ²	18.0%	18.0%	17.9%	0.1%	0.7%	18.7%	-0.7%	-3.9%	18.5%	-0.6%	-3.0%	
For nonreimbursed Rx products ³	23.2%	22.5%	22.6%	0.6%	2.7%	22.6%	0.6%	2.7%	22.1%	0.4%	1.9%	
For Non Rx products ⁴	29.6%	29.4%	29.1%	0.5%	1.8%	29.4%	0.2%	0.7%	28.6%	0.8%	2.7%	
NUMBER OF PATIENTS												
Total ¹	4 030	25 130	4 120	-90	-2.2%	3 830	200	5.2%	21 470	3 660	17.0%	
For reimbursed Rx products ²	970	5 600	970	0	0.0%	920	50	5.4%	5 070	530	10.5%	
For nonreimbursed Rx products ³	910	5 520	920	-10	-1.1%	820	90	11.0%	4 710	810	17.2%	
For Non Rx products ⁴	3 180	20 290	3 270	-90	-2.8%	3 060	120	3.9%	17 320	2 970	17.1%	
NUMBER OF PHARMACIES - SUMMARY[#]												
	13 019	13 052	13 030	-11	-0.1%	13 293	-263	-2.0%	13 341	-289	-2.2%	

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

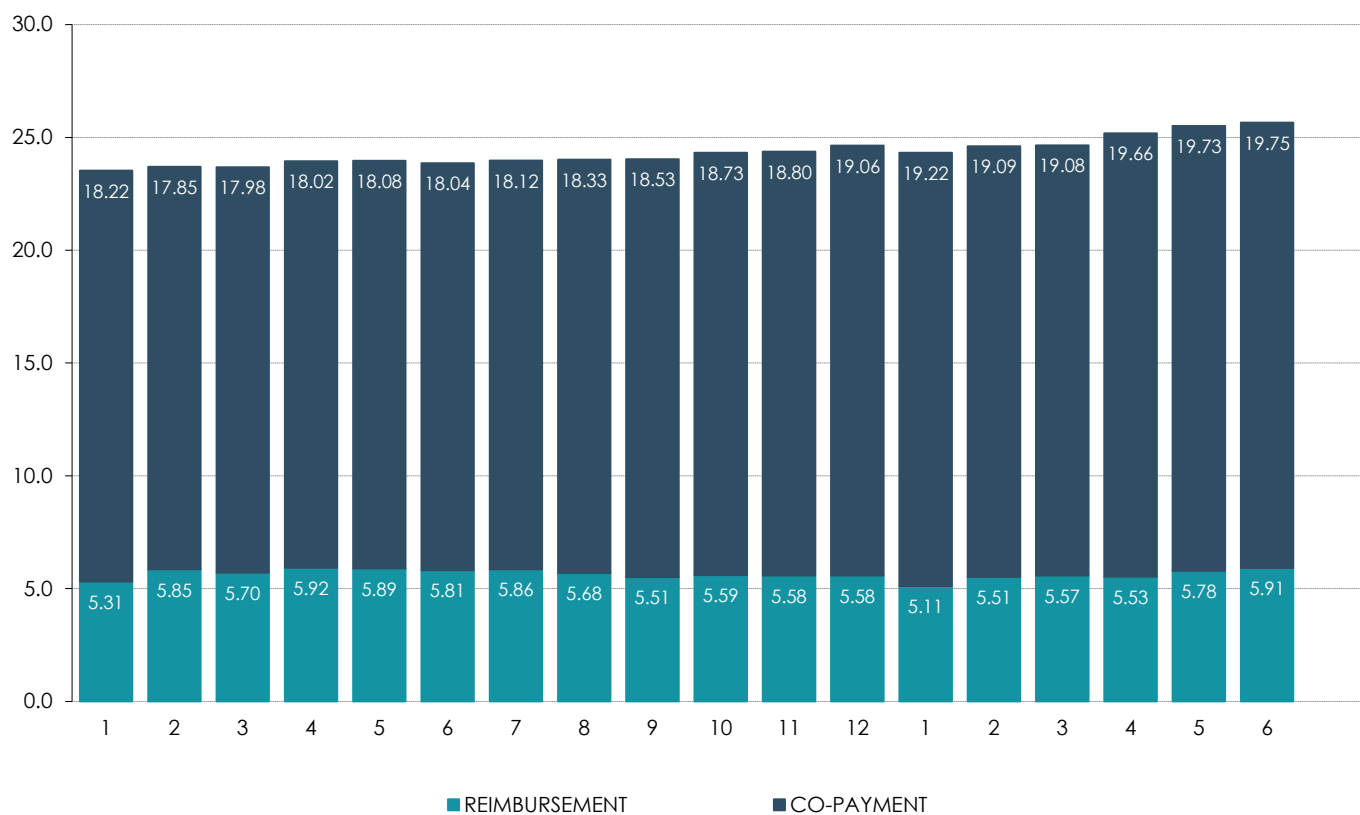
Liczba aptek opracowana na podstawie analizy PEX PharmaSequence

PHARMACIES ON THE OPEN MARKET



PRICE

STRUCTURE OF THE AVERAGE RETAIL PRICE⁵



All amounts are retail open pharmacy sales in PLN

Most important terms:

¹ Total open pharmacy market sales

² Total sales of Rx products covered by NHF reimbursement

³ Total sales of Rx products not covered by NHF reimbursement

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

⁵ The calculation of the average price is based on products categorized and included in the pharmacy data database operated by PEX PharmaSequence and Kamssoft (Omnibus) – they make up 97% of the pharmacy market.

PEX PHARMASEQUENCE COMMENTARY

The pharmacy market in June 2022 saw sales go close to 3547.7m PLN. Value of sales compared to June 2021 grew by 297.5m PLN (+9.2%). Compared to May of 2022, sales fell by approximately 35.6m PLN (-1%).

Compared to the same period of 2021 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 22.6m PLN (+2.1%), sales based on non-reimbursed prescriptions grew by 112.7m PLN (+13.7%), the non-prescription segment grew by 155.8m PLN (+11.6%).

Compared to the previous month, the value of tracked segments grew for one monitored segments. Value of reimbursed prescriptions grew by 4.2m PLN (+0.4%), value of non-reimbursed RX drugs fell by 35m PLN (-3.6%) and value of products sold without a prescriptions fell by 4.5m PLN (-0.3%).

The average retail drug price in June 2022 was 25.7 PLN and was 0.6% higher than the average price in the previous month, and 7.6% higher than the average price in June 2021. The average retail price of reimbursed prescription was 30.6 PLN (+2.9% vs June 2021), 33.4 PLN for non-reimbursed prescriptions (+9.4% vs June 2021) and 20.2 PLN for products sold without a prescription (+9.7% vs June 2021).

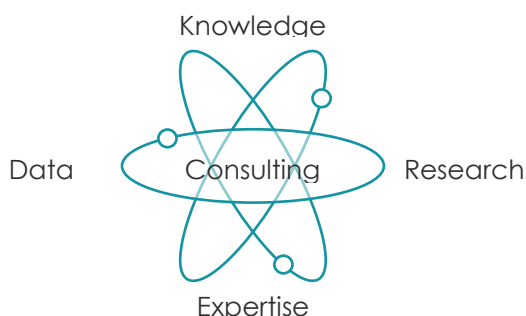
Average pharmacy margin for all drugs in June 2022 was 25.3% and was higher by 1.2% than margin in the same period of 2021. Compared to May 2022, the average pharmacy margin was higher by 1.7%.

Drug reimbursement by the National Health Fund in June was in the amount 817m PLN, 3.2% more than in the same period of 2021. The level of patient copayment for reimbursed drugs in June was 23%, grew by 0.4p.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



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Ask us a question:

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