pex
PharmaSequence

Warszawa, 26.10.2022

MONTHLY REPORT – SEPTEMBER 2022

TOTAL OPEN MARKET (SELL-OUT REPORT)

	SEPTEMEBR 2022	CHANGE IN COMPARISON TO AUGUST 2022	JANUARY 2022	SEPTEMBER 2021	CUMULATIVE YTD 2022	CHANGE VS 2021
TOTAL TURNOVER (PLN MILLION)						
Total open market [1]	4 042	11.5%	11.1%	9.6%	33 323	14.3%
Rx reimbursed [2]	1 177	9.1%	16.3%	3.9%	9 859	6.1%
Rx nonreimbursed [3]	1 009	7.2%	15.0%	12.3%	8 572	16.9%
Non Rx products [4]	1 820	16.0%	6.0%	11.7%	14 591	18.9%
REIMBURSEMENT						
Reimbursement value (PLN million)	889	8.3%	16.3%	5.2%	7 454	6.6%
Reimbursement share In total turnover	22.0%	-2.9%	4.7%	-4.0%	22.4%	-6.8%
Reimbursement share In reimbursed sales	74.2%	-0.7%	0.3%	1.1%	74.2%	0.3%
AVERAGE PRICE PER PACK (PLN)						
Total [1]	26.0	0.3%	6.8%	8.1%	25.0	11.1%
For reimbursed Rx products [2]	31.0	1.3%	3.7%	2.9%	30.5	1.1%
For nonreimbursed Rx products [3]	34.2	-0.5%	9.1%	10.3%	32.5	4.7%
For Non Rx products [4]	20.8	2.0%	5.0%	10.1%	19.8	4.7%
AVERAGE MARK-UP						
Total [1]	25.9%	1.2%	1.7%	-1.2%	25.3%	1.6%
For reimbursed Rx products [2]	19.9%	7.9%	11.9%	5.7%	18.0%	-2.8%
For nonreimbursed Rx products [3]	22.4%	3.7%	3.4%	-11.5%	22.3%	-1.0%
For Non Rx products [4]	29.7%	-3.7%	1.4%	-1.8%	29.6%	2.2%
AVERAGE PHARMACY						
Number of patients in pharmacies	4 480	10.1%	7.2%	2.5%	37 700	12.6%
Total turnover (PLN thousand) [1]	313	11.8%	12.6%	12.2%	2 559	16.9%

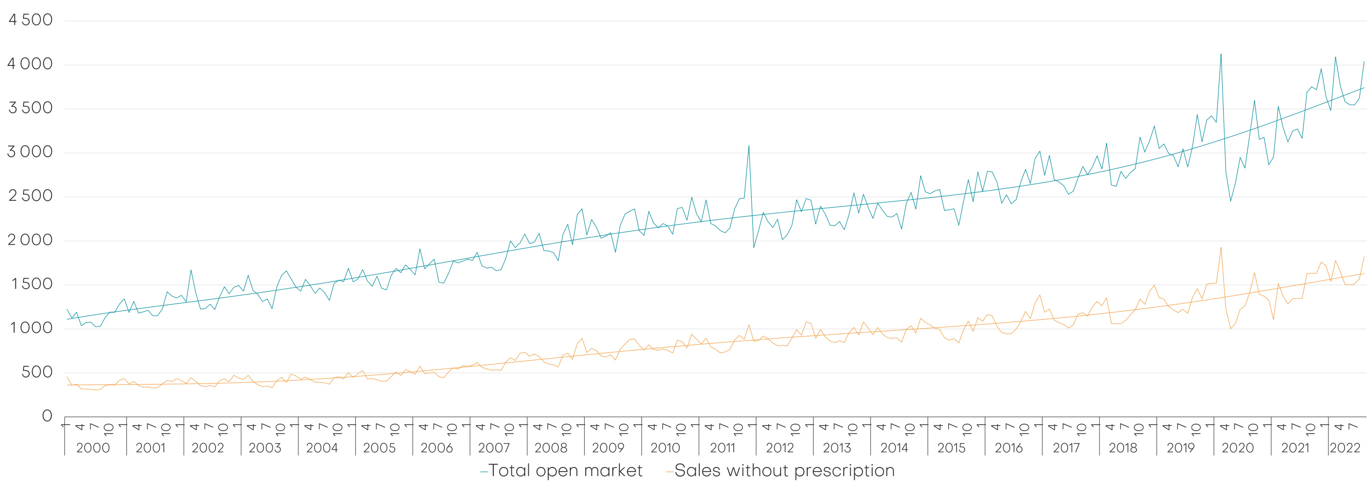
TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

2022	PHARMACY MARKET TOTAL [1] TOTAL	CHANGE VS 2021	RX REIMBURSED PRESCRIPTIONS [2] TOTAL	CHANGE VS 2021	RX NONREIMBURSED PRESCRIPTIONS [3] TOTAL	CHANGE VS 2021	NON RX PRODUCTS [4] 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	25 657	15.1%	7 605	6.2%	6 621	17.5%	11 201	20.5%
August	29 280	15.0%	8 683	6.4%	7 563	17.6%	12 771	20.0%
September	33 322	14.3%	9 859	6.1%	8 572	16.9%	14 591	18.9%
October								
November								
December								

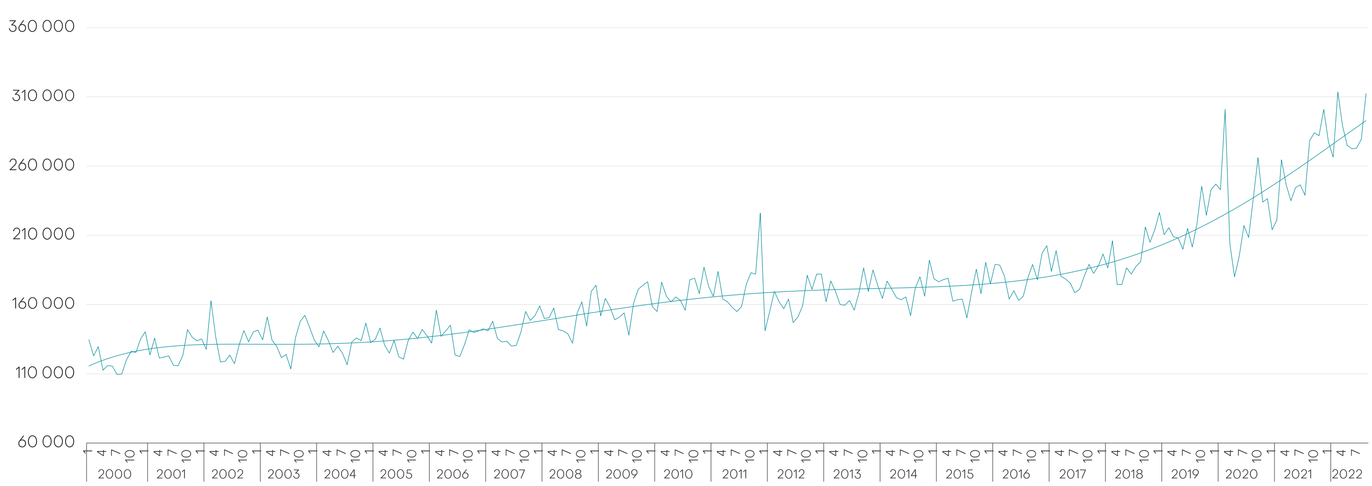
Retail sales in PLN

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN



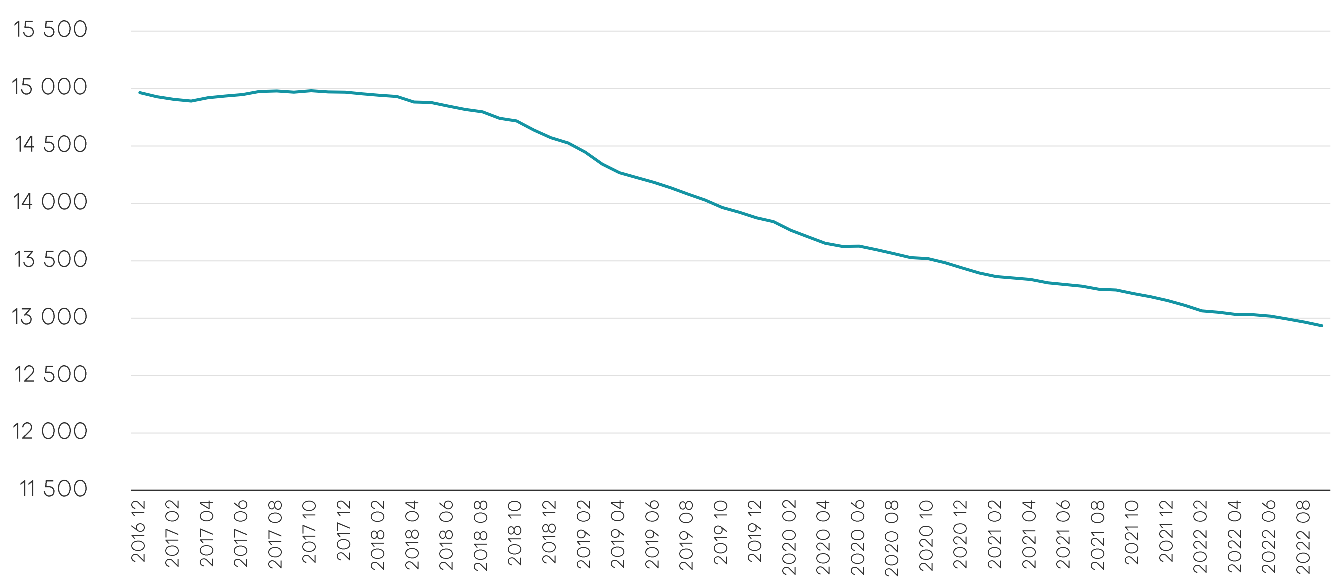
AVERRAGE PHARMACY

	SEPTEMBER'22	YTD'2021	AUGUST'22	CHANGE		SEPTEMBER'21	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
TOTAL TURNOVER (THOUSAND PLN)											
Total open market [1]	313	2 559	280	33.0	11.8%	279	34.0	12.2%	2 190	369.5	16.9%
Rx reimbursed [2]	91	757	83	7.8	9.4%	86	5.4	6.4%	698	59.2	8.5%
Rx nonreimbursed [3]	78	658	73	5.4	7.4%	68	10.2	15.0%	551	107.5	19.5%
Non Rx products [4]	141	1 120	121	19.7	16.2%	123	17.7	14.4%	922	198.3	21.5%
AVERAGE PRICE[5] PER PACK (PLN)											
Total [1]	26	25	25.9	0.1	0.3%	24.0	1.9	8.1%	23.9	1.4	6.0%
For reimbursed Rx products [2]	31	31	30.6	0.4	1.3%	30.2	0.9	2.9%	29.7	0.8	2.8%
For nonreimbursed products [3]	34	33	34.4	-0.2	-0.5%	31.0	3.2	10.3%	30.4	2.5	8.4%
For Non Rx products [4]	21	20	20.4	0.4	2.0%	18.9	1.9	10.1%	18.5	1.6	8.4%
AVERAGE MARK-UP*											
Total [1]	25.9%	25.3%	25.6%	0.3%	1.2%	26.2%	-0.3%	-1.2%	24.8%	0.5%	2.0%
For reimbursed Rx products [2]	19.9%	18.2%	18.4%	1.5%	7.9%	18.8%	1.1%	5.7%	18.5%	-0.3%	-1.7%
For nonreimbursed Rx products [3]	22.4%	22.3%	21.6%	0.8%	3.7%	25.3%	-2.9%	-11.5%	22.4%	-0.2%	-0.8%
For Non Rx products [4]	29.7%	29.6%	30.8%	-1.1%	-3.7%	30.2%	-0.5%	-1.8%	29.0%	0.7%	2.3%
NUMBER OF PATIENTS											
Total [1]	4 480	37 700	4 070	410	10.1%	4 370	110	2.5%	33 490	4 210	12.6%
For reimbursed Rx products [2]	910	8 170	830	80	9.6%	1 000	-90	-9.0%	7 870	300	3.8%
For nonreimbursed Rx products [3]	950	8 210	870	80	9.2%	910	40	4.4%	7 220	990	13.7%
For Non Rx products [4]	3 690	30 570	3 320	370	11.1%	3 540	150	4.2%	26 970	3 600	13.3%
NUMBER OF PHARMACIES - SUMMARY#	12 935	13 023	12 965	-30	-0.2%	13 246	-281	-2.1%	13 314	-291	-2.2%

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

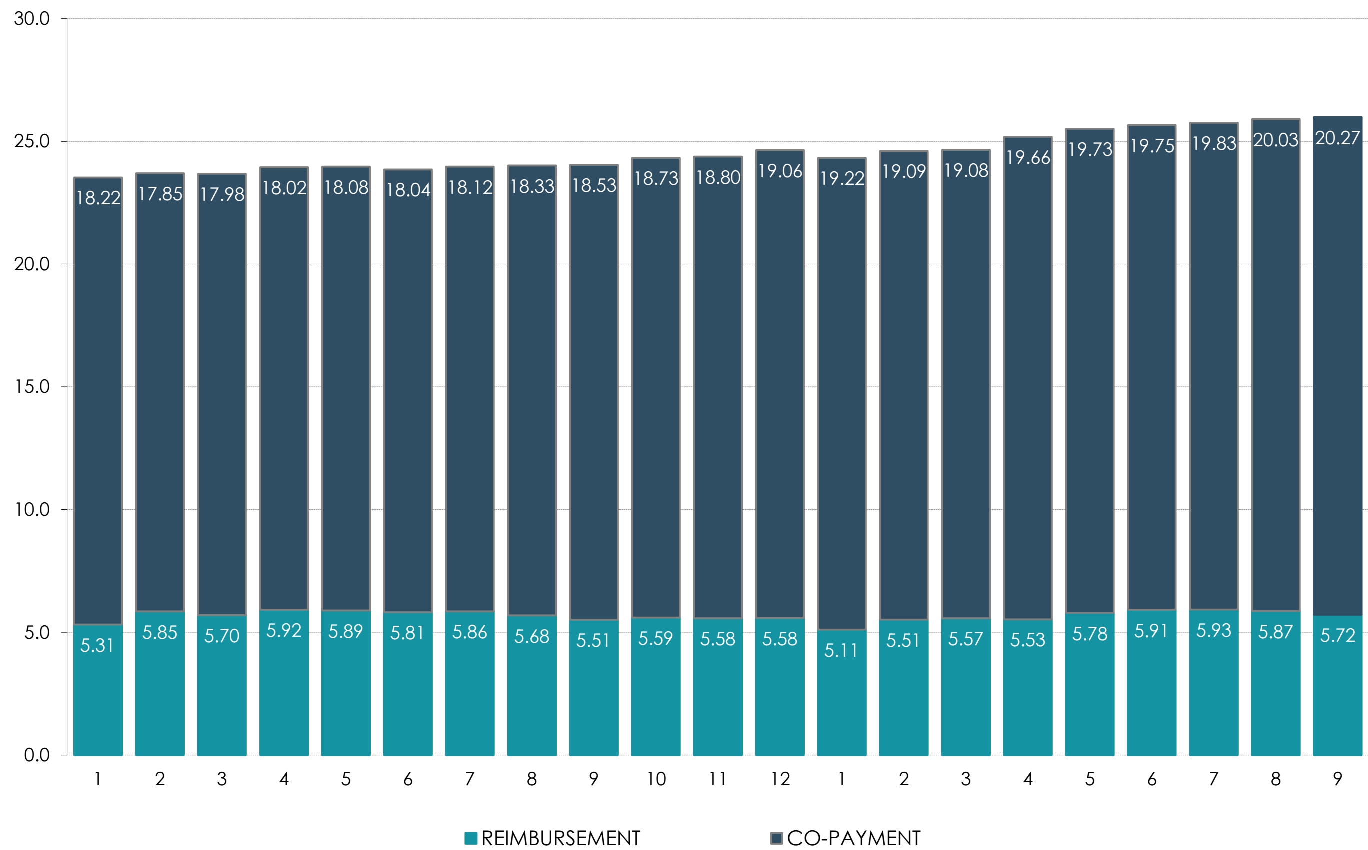
Number of pharmacies based on PEX's analysis.

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 Kamsoft (Omnibus) – they make up 97% of the pharmacy market.

PEX PHARMASEQUENCE COMMENTARY

The pharmacy market in September 2022 saw sales go close to 4042.2m PLN. Value of sales compared to September 2021 grew by 353.2m PLN (+9.6%). Compared to August of 2022, sales grew by approximately 418.5m PLN (+11.5%).

Compared to the same period of 2021 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 43.8m PLN (+3.9%), sales based on non-reimbursed prescriptions grew by 110.2m PLN (+12.3%), the non-prescription segment grew by 191m PLN (+11.7%).

Compared to the previous month, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 98.6m PLN (+9.1%), value of non-reimbursed RX drugs grew by 67.4m PLN (+7.2%) and value of products sold without a prescriptions grew by 250.6m PLN (+16%).

The average retail drug price in September 2022 was 26 PLN and was 0.3% higher than the average price in the previous month, and 8.1% higher than the average price in September 2021. The average retail price of reimbursed prescription was 31 PLN (+2.9% vs September 2021), 34.2 PLN for non-reimbursed prescriptions (+10.3% vs September 2021) and 20.8 PLN for products sold without a prescription (+10.1% vs September 2021).

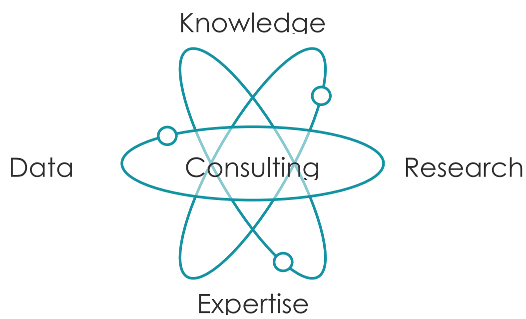
Average pharmacy margin for all drugs in September 2022 was 25.9% and was lower by 1.2% than margin in the same period of 2021. Compared to August 2022, the average pharmacy margin was higher by 1.2%.

Drug reimbursement by the National Health Fund in September was in the amount 889m PLN, 5.2% more than in the same period of 2021. The level of patient copayment for reimbursed drugs in September was 22%, fell by 0.7p.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 more info

Ask us a question:
solutions_by_pex@pexps.pl
22 886 47 15

Published on the 26st of September 2022,
prepared by Antoni Bremer,
based on PEX PharmaSequence data.

PEX PharmaSequence Sp. z o.o.
ul. Kłobucka 23, 02-699 Warszawa
tel.: (+48) 22 886 47 15
fax (+48) 22 638 21 29
biuro@pexps.pl