



Warsaw, 21.11.2022

MONTHLY REPORT – OCTOBER 2022

TOTAL OPEN MARKET (SELL-OUT REPORT)

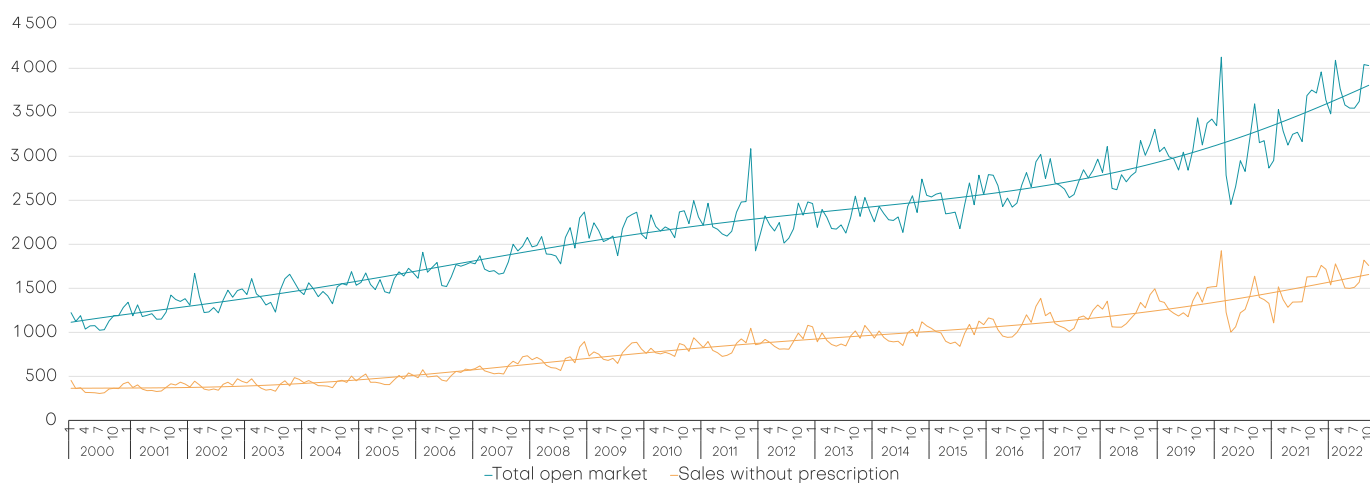
	OCTOBER 2022	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		SEPTEMBER 2022	JANUARY 2022	OCTOBER 2021	2022	CHANGE VS 2021
TOTAL TURNOVER (PLN MILLION)						
Total open market ¹	4 031	-0.3%	10.8%	7.4%	37 354	13.5%
Rx reimbursed ²	1 197	1.7%	18.3%	3.7%	11 057	5.9%
Rx nonreimbursed ³	1 037	2.7%	18.1%	11.0%	9 608	16.2%
Non Rx products ⁴	1 759	-3.3%	2.5%	7.7%	16 350	17.6%
REIMBURSEMENT						
Reimbursement value (PLN million)	903	1.6%	18.2%	4.7%	8 357	6.3%
Reimbursement share In total turnover	22.4%	1.9%	6.7%	-2.5%	22.4%	-6.3%
Reimbursement share In reimbursed sales	74.1%	-0.2%	0.1%	0.8%	74.2%	0.4%
AVERAGE PRICE PER PACK (PLN)						
Total ¹	26.5	1.8%	8.7%	8.7%	25.2	5.3%
For reimbursed Rx products ²	31.4	1.1%	4.9%	3.5%	30.6	2.6%
For nonreimbursed Rx products ³	34.3	0.4%	9.5%	10.1%	32.7	7.2%
For Non Rx products ⁴	21.2	1.4%	6.5%	10.3%	20.0	7.4%
AVERAGE MARK-UP						
Total ¹	25.2%	-2.8%	-1.1%	0.9%	25.3%	1.8%
For reimbursed Rx products ²	19.4%	-2.3%	9.4%	8.1%	18.4%	-0.6%
For nonreimbursed Rx products ³	21.1%	-5.7%	-2.5%	-5.9%	22.1%	-1.5%
For Non Rx products ⁴	32.4%	9.2%	10.7%	9.5%	29.9%	3.0%
AVERAGE PHARMACY						
Number of patients in pharmacies	4 420	-1.3%	5.7%	0.0%	42 120	11.1%
Total turnover (PLN thousand) ¹	312	-0.2%	12.4%	9.9%	2 871	16.1%

TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

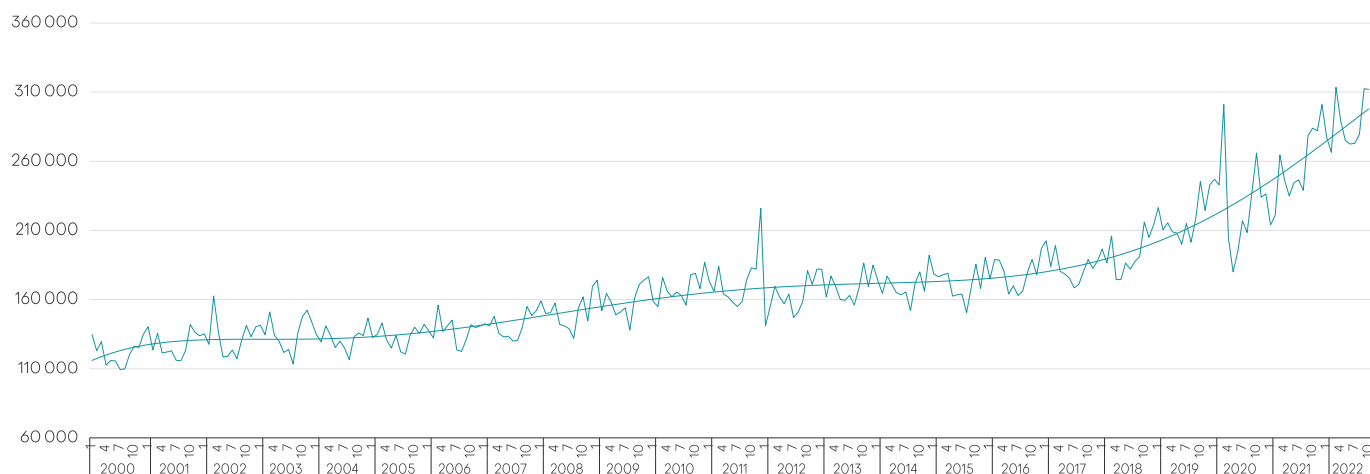
2022	PHARMACY MARKET TOTAL ¹		RX REIMBURSED PRESCRIPTIONS ²		RX NONREIMBURSED PRESCRIPTIONS ³		NON RX PRODUCTS ⁴	
	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021	TOTAL	CHANGE VS 2021
January	3 639	26.9%	1 012	18.6%	877	33.5%	1 717	29.2%
February	7 120	22.4%	2 053	12.6%	1 749	16.0%	3 256	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	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	37 354	13.5%	11 057	5.9%	9 608	16.2%	16 350	17.6%
November								
December								

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN



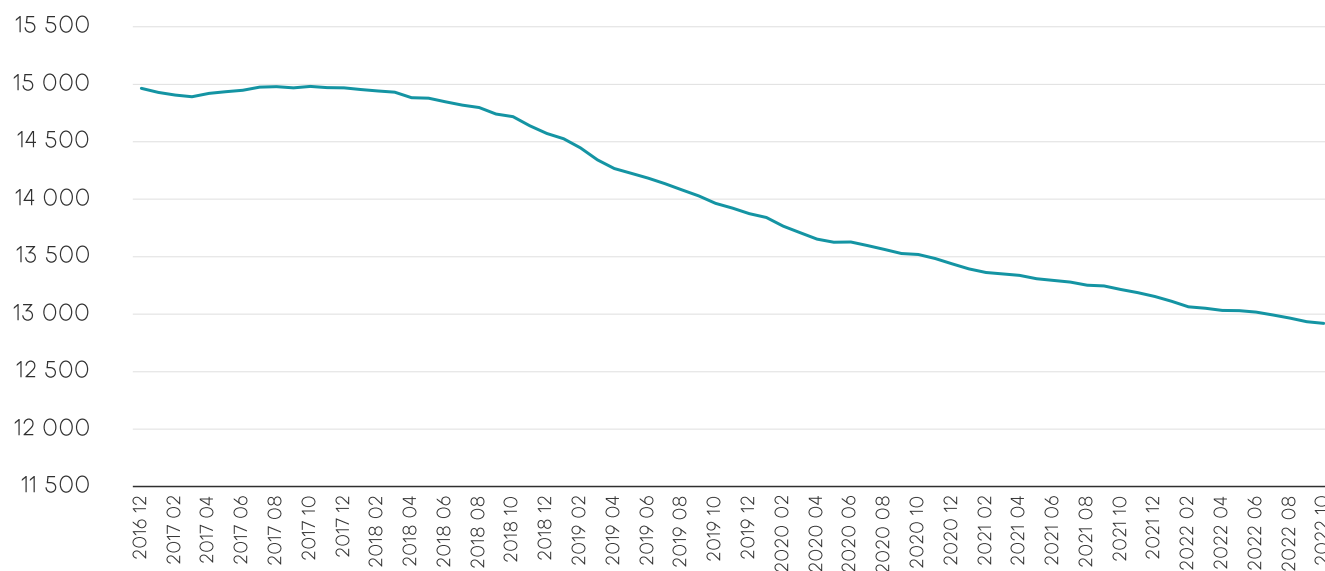
AVERAGE PHARMACY

	OCTOBER'22	YTD'2021	SEPTEMBER'22	CHANGE		OCTOBER'21	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
TOTAL TURNOVER (THOUSAND PLN)											
Total open market ¹	312	2 871	313	-0.5	-0.2%	284	28.0	9.9%	2 474	397.5	16.1%
Rx reimbursed ²	93	850	91	1.7	1.8%	87	5.3	6.1%	785	64.5	8.2%
Rx nonreimbursed ³	80	739	78	2.2	2.9%	71	9.5	13.5%	621	117.0	18.8%
Non Rx products ⁴	136	1 257	141	-4.5	-3.2%	124	12.6	10.2%	1 046	210.9	20.2%
AVERAGE PRICE⁵ PER PACK (PLN)											
Total ¹	26	25	26.0	0.5	1.8%	24.3	2.1	8.7%	23.9	1.5	6.3%
For reimbursed Rx products ²	31	31	31.0	0.3	1.1%	30.3	1.0	3.5%	29.8	0.9	2.9%
For nonreimbursed products ³	34	33	34.2	0.1	0.4%	31.2	3.1	10.1%	30.5	2.6	8.5%
For Non Rx products ⁴	21	20	20.8	0.3	1.4%	19.2	2.0	10.3%	18.6	1.6	8.6%
AVERAGE MARK-UP*											
Total ¹	25.2%	25.3%	25.9%	-0.7%	-2.8%	25.0%	0.2%	0.9%	24.8%	0.5%	1.9%
For reimbursed Rx products ²	19.4%	18.3%	19.9%	-0.5%	-2.3%	17.9%	1.5%	8.1%	18.5%	-0.1%	-0.7%
For nonreimbursed Rx products ³	21.1%	22.1%	22.4%	-1.3%	-5.7%	22.4%	-1.3%	-5.9%	22.4%	-0.3%	-1.3%
For Non Rx products ⁴	32.4%	29.9%	29.7%	2.7%	9.2%	29.6%	2.8%	9.5%	29.0%	0.9%	3.0%
NUMBER OF PATIENTS											
Total ¹	4 420	42 120	4 480	-60	-1.3%	4 420	0	0.0%	37 910	4 210	11.1%
For reimbursed Rx products ²	930	9 100	910	20	2.2%	1 030	-100	-9.7%	8 900	200	2.2%
For nonreimbursed Rx products ³	980	9 190	950	30	3.2%	950	30	3.2%	8 170	1 020	12.5%
For Non Rx products ⁴	3 600	34 170	3 690	-90	-2.4%	3 560	40	1.1%	30 530	3 640	11.9%
NUMBER OF PHARMACIES - SUMMARY#											
	12 920	13 012	12 935	-15	-0.1%	13 215	-280	-2.1%	13 304	-292	-2.2%

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

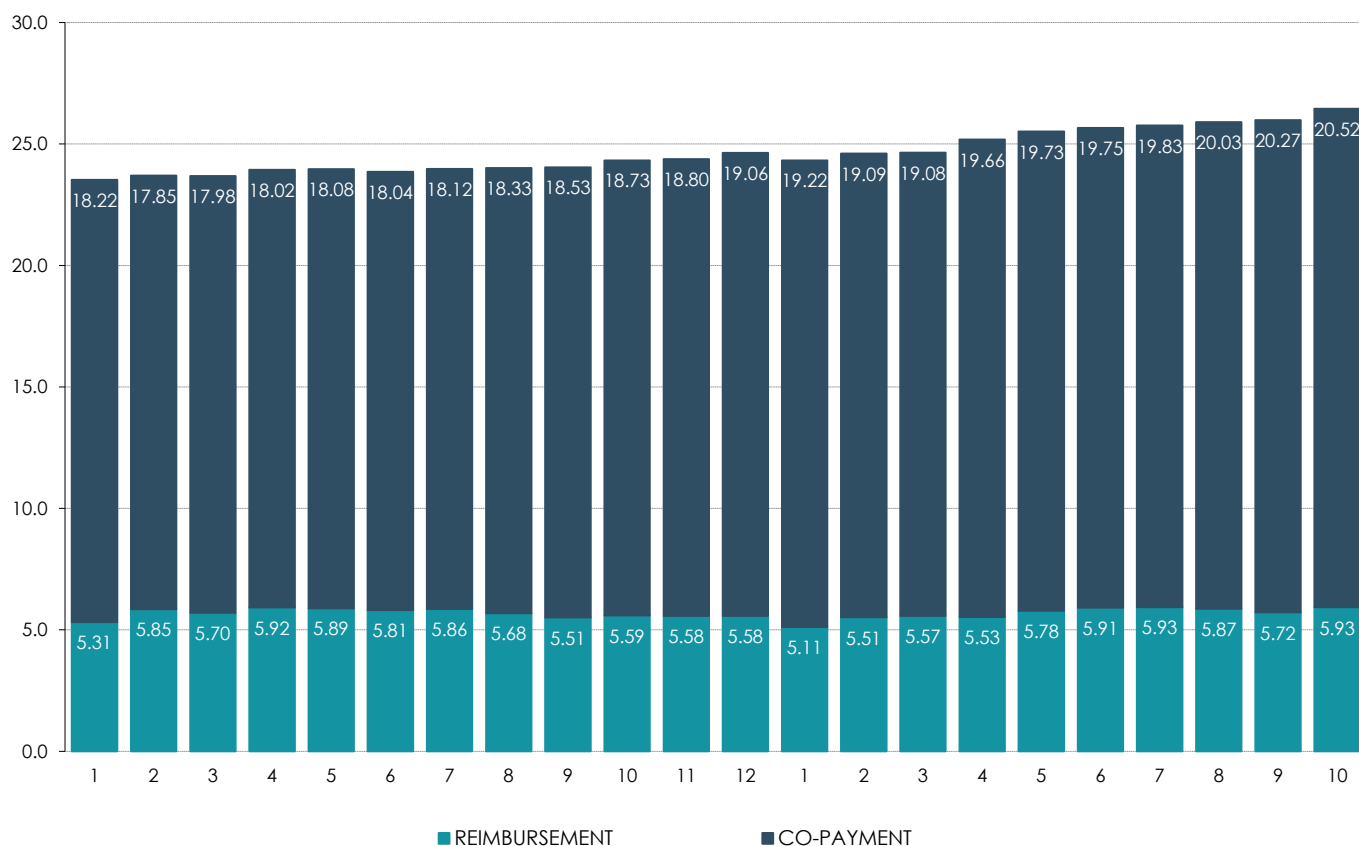
Number of pharmacies based on PEX's analysis.

PHARMACIES ON THE OPEN MARKET



PRICE

STRUCTURE OF THE AVERAGE RETAIL PRICES⁵



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 October 2022 saw sales go close to 4 031m PLN. Value of sales compared to October 2021 grew by 278m PLN (+7.4%). Compared to September of 2022, sales fell by approximately 11.1m PLN (-0.3%).

Compared to the same period of 2021 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 42.5m PLN (+3.7%), sales based on non-reimbursed prescriptions grew by 102.5m PLN (+11%), the non-prescription segment grew by 126m PLN (+7.7%).

Compared to the previous month, the value of tracked segments grew for two monitored segments. Value of reimbursed prescriptions grew by 20.4m PLN (+1.7%), value of non-reimbursed RX drugs grew by 27.7m PLN (+2.7%) and value of products sold without a prescriptions fell by 60.8m PLN (-3.3%).

The average retail drug price in October 2022 was 26.5 PLN and was 1.8% higher than the average price in the previous month, and 8.7% higher than the average price in October 2021. The average retail price of reimbursed prescription was 31.4 PLN (+3.5% vs October 2021), 34.3 PLN for non-reimbursed prescriptions (+10.1% vs October 2021) and 21.2 PLN for products sold without a prescription (+10.3% vs October 2021).

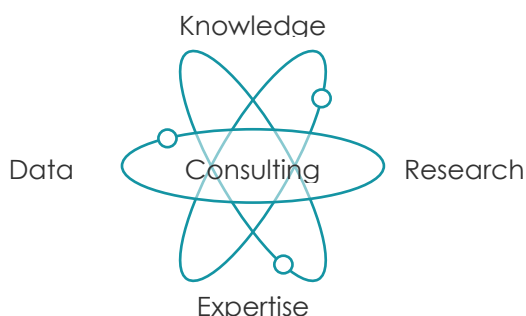
Average pharmacy margin for all drugs in October 2022 was 25.2% and was higher by 0.9% than margin in the same period of 2021. Compared to September 2022, the average pharmacy margin was lower by 2.8%.

Drug reimbursement by the National Health Fund in October was in the amount 903m PLN, 4.7% more than in the same period of 2021. The level of patient copayment for reimbursed drugs in October was 22.4%, 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



www.pexps.pl more info



Ask us a question:

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