pex
PharmaSequence

Warszawa, 27.04.2023

MONTHLY REPORT – MARCH 2023

TOTAL OPEN MARKET (SELL-OUT REPORT)

	MARCH 2023	CHANGE IN COMPARISON TO FEBRUARY 2023	CHANGE IN COMPARISON TO JANUARY 2023	CHANGE IN COMPARISON TO MARCH 2022	CUMULATIVE YTD 2023	CUMULATIVE YTD CHANGE VS 2022
TOTAL TURNOVER (PLN MILLION)						
Total open market [1]	4 482	15.7%	8.1%	9.5%	12 501	11.5%
Rx reimbursed [2]	1 278	15.7%	11.0%	4.4%	3 533	7.8%
Rx nonreimbursed [3]	1 214	18.4%	11.2%	14.9%	3 331	18.7%
Non Rx products [4]	1 950	14.1%	4.5%	9.6%	5 524	9.7%
REIMBURSEMENT						
Reimbursement value (PLN million)	958	16.4%	10.9%	3.6%	2 646	7.1%
Reimbursement share In total turnover	21.4%	0.6%	2.5%	-5.4%	21.2%	-3.9%
Reimbursement share In reimbursed sales	63.1%	-13.7%	-14.2%	-15.1%	69.7%	-5.8%
AVERAGE PRICE PER PACK (PLN)						
Total [1]	27.4	1.0%	2.0%	11.3%	27.2	10.8%
For reimbursed Rx products [2]	31.3	-0.4%	0.0%	2.3%	31.3	3.5%
For nonreimbursed Rx products [3]	35.9	0.4%	2.0%	11.8%	35.7	12.2%
For Non Rx products [4]	22.2	1.4%	1.9%	14.8%	22.0	12.2%
AVERAGE MARK-UP						
Total [1]	25.1%	-4.5%	1.6%	-1.2%	25.4%	-0.2%
For reimbursed Rx products [2]	20.5%	5.1%	-0.7%	10.4%	20.3%	11.1%
For nonreimbursed Rx products [3]	21.9%	0.1%	2.5%	-4.9%	21.7%	-2.9%
For Non Rx products [4]	30.5%	-2.0%	2.5%	3.2%	30.5%	3.3%
AVERAGE PHARMACY						
Number of patients in pharmacies	4 820	15.3%	7.6%	5.9%	13 480	6.4%
Total turnover (PLN thousand) [1]	350	15.9%	8.5%	11.6%	975	13.6%

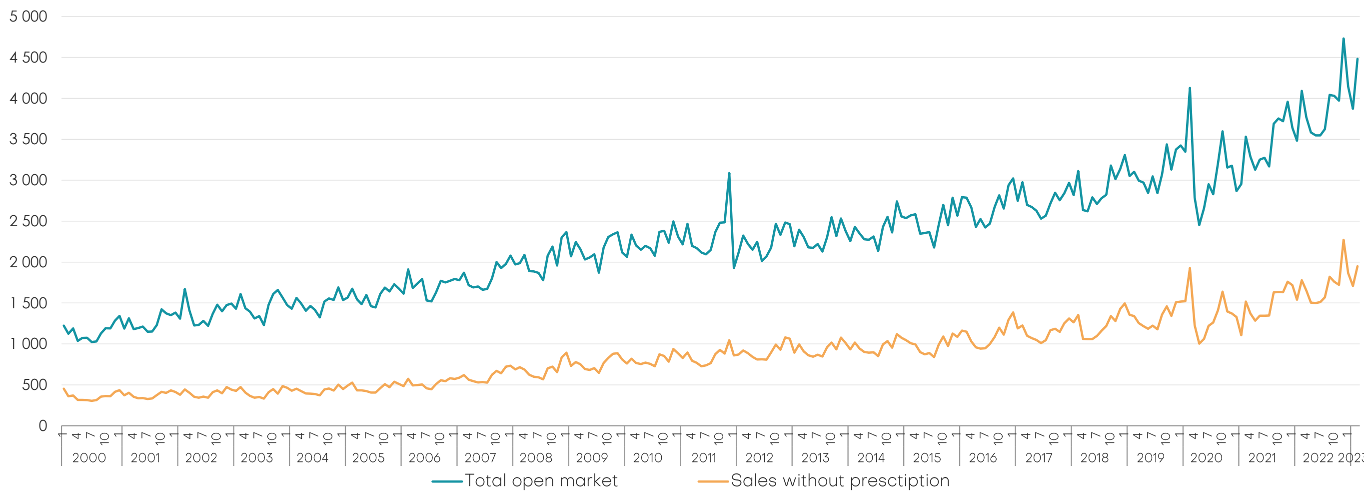
TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

2023	PHARMACY MARKET TOTAL [1] TOTAL	PHARMACY MARKET TOTAL [1] CHANGE VS 2022	RX REIMBURSED PRESCRIPTIONS [2] TOTAL	RX REIMBURSED PRESCRIPTIONS [2] CHANGE VS 2022	RX NONREIMBURSED PRESCRIPTIONS [3] TOTAL	RX NONREIMBURSED PRESCRIPTIONS [3] CHANGE VS 2022	NON RX PRODUCTS [4] TOTAL	NON RX PRODUCTS [4] CHANGE VS 2022
January	4 145	13.9%	1 151	13.8%	1 092	24.4%	1 865	8.6%
February	8 019	12.6%	2 255	9.9%	2 117	21.1%	3 574	9.8%
March	12 501	11.5%	3 533	7.8%	3 331	18.7%	5 524	9.7%
April								
May								
June								
July								
August								
September								
October								
November								
December								

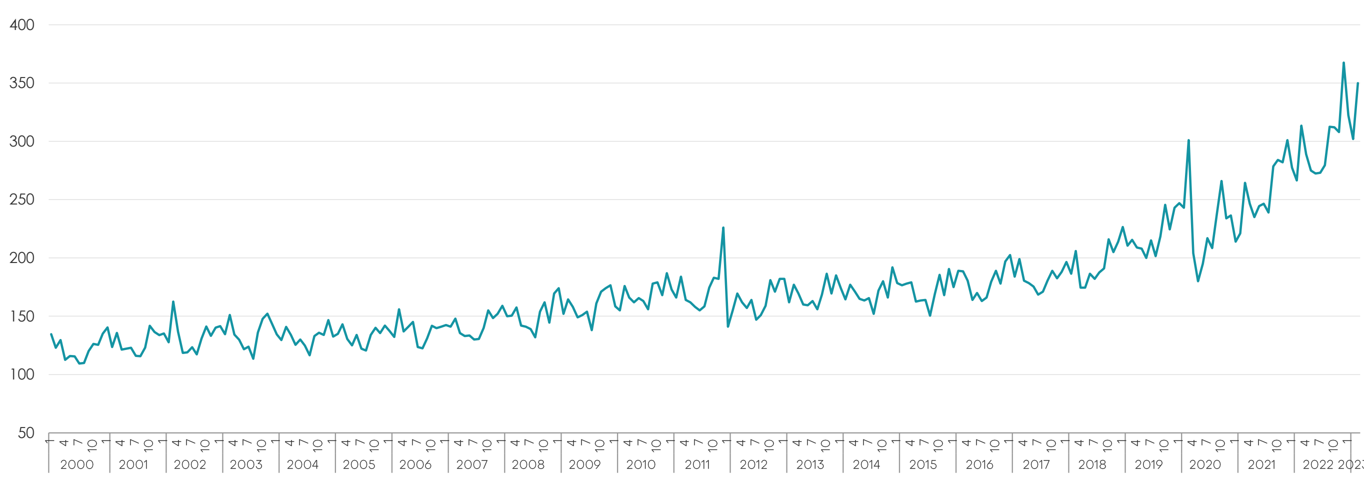
Retail sales in PLN

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN THOUSAND



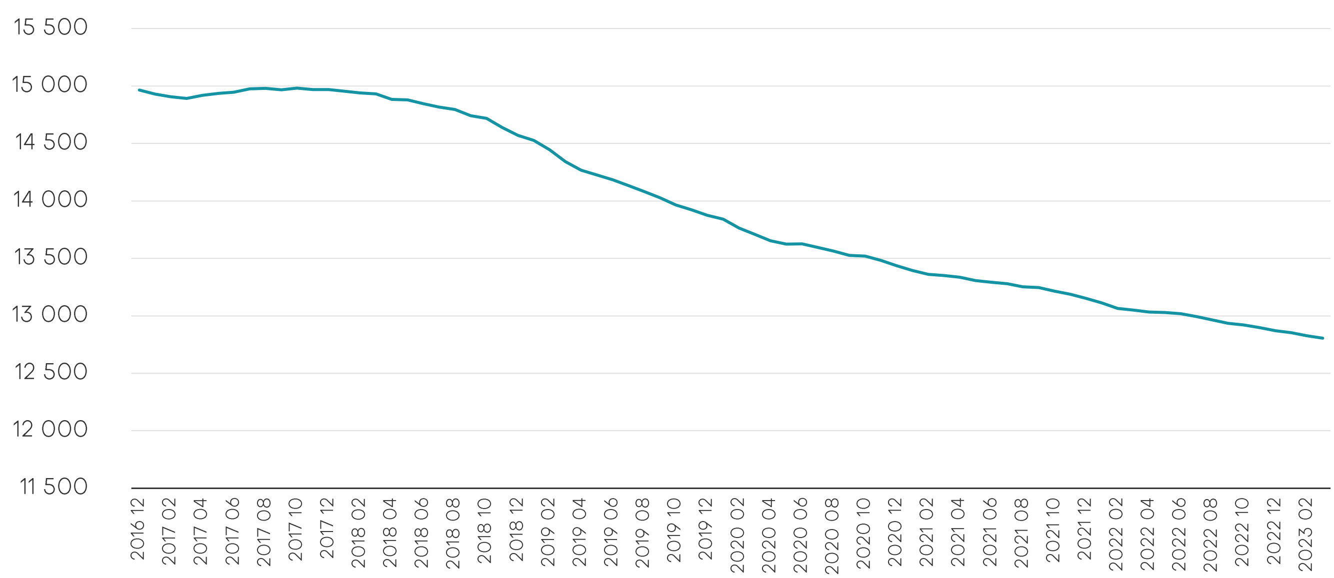
AVERRAGE PHARMACY

	MARCH'23	YTD'2021	FEBRUARY'23	CHANGE		MARCH'22	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
TOTAL TURNOVER (THOUSAND PLN)											
Total open market [1]	350	975	302	48.0	15.9%	314	36.5	11.6%	858	117.0	13.6%
Rx reimbursed [2]	100	275	86	13.7	15.9%	94	6.0	6.4%	251	24.8	9.9%
Rx nonreimbursed [3]	95	260	80	14.9	18.6%	81	13.8	17.1%	215	45.1	21.0%
Non Rx products [4]	152	431	133	19.0	14.3%	136	16.0	11.7%	385	45.6	11.8%
AVERAGE PRICE[5] PER PACK (PLN)											
Total [1]	27	27	27.2	0.3	1.0%	24.6	2.8	11.3%	24.5	2.6	10.8%
For reimbursed Rx products [2]	31	31	31.4	-0.1	-0.4%	30.6	0.7	2.3%	30.3	1.1	3.5%
For nonreimbursed products [3]	36	36	35.8	0.1	0.4%	32.1	3.8	11.8%	31.8	3.9	12.2%
For Non Rx products [4]	22	22	21.9	0.3	1.4%	19.4	2.9	14.8%	19.6	2.4	12.2%
AVERAGE MARK-UP*											
Total [1]	25.1%	25.4%	26.3%	-1.2%	-4.5%	25.4%	-0.3%	-1.2%	25.4%	-0.1%	-0.2%
For reimbursed Rx products [2]	20.5%	20.3%	19.5%	1.0%	5.1%	18.6%	1.9%	10.4%	18.2%	2.0%	11.1%
For nonreimbursed Rx products [3]	21.9%	21.7%	21.9%	0.0%	0.1%	23.1%	-1.1%	-4.9%	22.4%	-0.7%	-2.9%
For Non Rx products [4]	30.5%	30.5%	31.2%	-0.6%	-2.0%	29.6%	0.9%	3.2%	29.5%	1.0%	3.3%
NUMBER OF PATIENTS											
Total [1]	4 820	13 480	4 180	640	15.3%	4 550	270	5.9%	12 670	810	6.4%
For reimbursed Rx products [2]	1 020	2 840	880	140	15.9%	1 050	-30	-2.9%	2 670	170	6.4%
For nonreimbursed Rx products [3]	1 130	3 130	960	170	17.7%	1 000	130	13.0%	2 740	390	14.2%
For Non Rx products [4]	3 900	10 940	3 390	510	15.0%	3 660	240	6.6%	10 370	570	5.5%
NUMBER OF PHARMACIES - SUMMARY#	12 806	38 486	12 826	-20	-0.2%	13 051	-245	-1.9%	39 229	-743	-1.9%

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

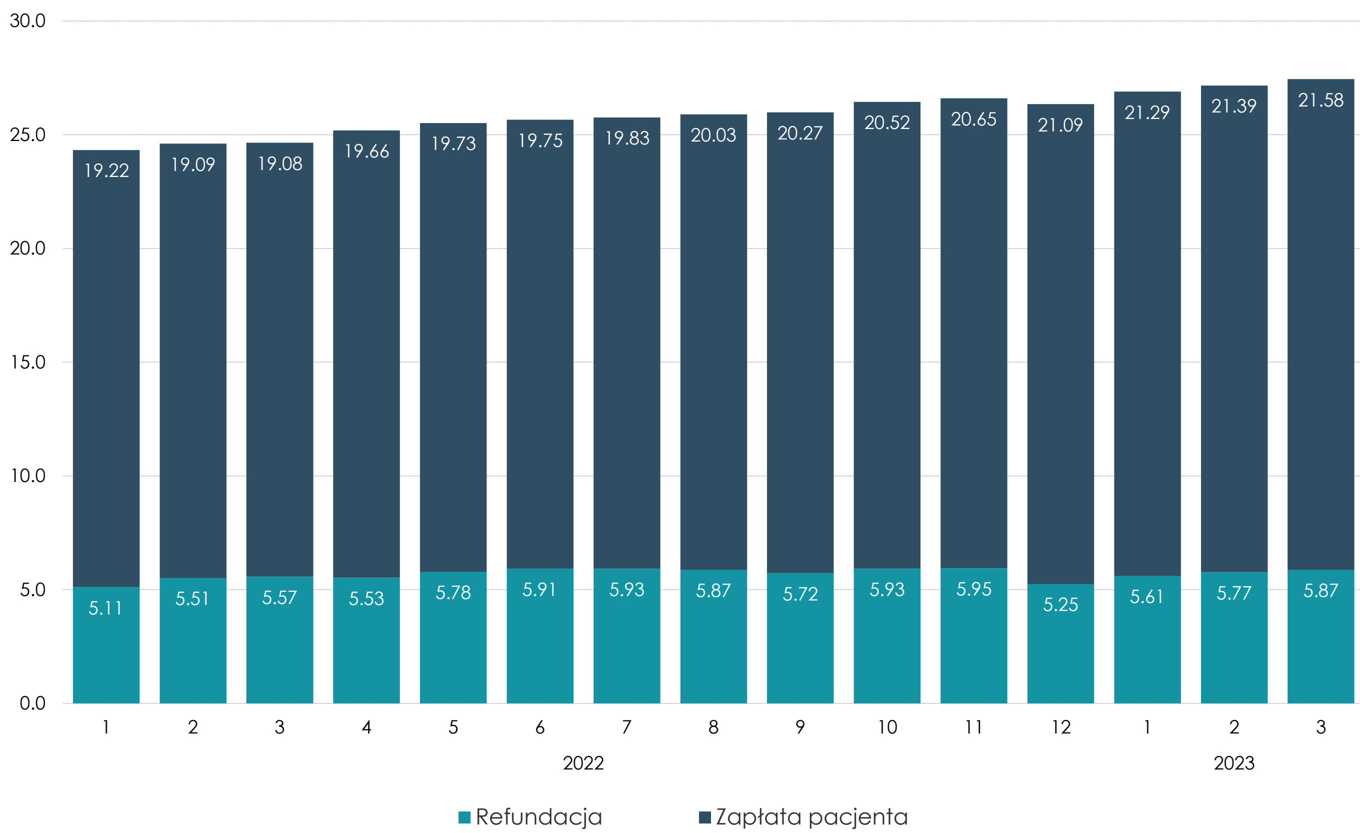
Number of pharmacies based on PEX's analysis.

PHARMACIES ON THE OPEN MARKET



PRICE

STRUCTURE OF THE AVERAGE RETAIL PRICE[5]



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 March 2023 saw sales go close to 4 482.1m PLN. Value of sales compared to March 2022 grew by 390.6m PLN (+9.5%). Compared to February of 2023, sales grew by approximately 608.6m PLN (+15.7%).

Compared to the same period of 2022 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 54m PLN (+4.4%), sales based on non-reimbursed prescriptions grew by 157.1m PLN (+14.9%), the non-prescription segment grew by 171.5m PLN (+9.6%).

Compared to the previous month, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 173.7m PLN (+15.7%), value of non-reimbursed RX drugs grew by 189m PLN (+18.4%) and value of products sold without a prescriptions grew by 240.8m PLN (+14.1%).

The average retail drug price in March 2023 was 27.4 PLN and was 1% higher than the average price in the previous month, and 11.3% higher than the average price in March 2022. The average retail price of reimbursed prescription was 31.3 PLN (+2.3% vs March 2022), 35.9 PLN for non-reimbursed prescriptions (+11.8% vs March 2022) and 22.2 PLN for products sold without a prescription (+14.8% vs March 2022).

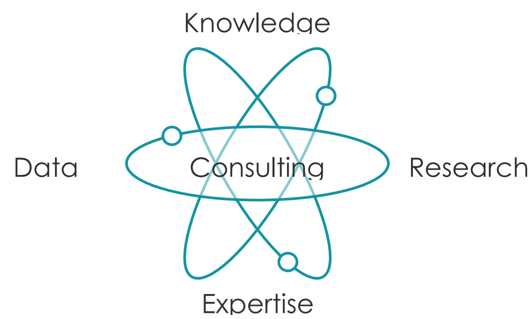
Average pharmacy margin for all drugs in March 2023 was 25.1% and was lower by 1.2% than margin in the same period of 2022. Compared to February 2023, the average pharmacy margin was lower by 4.5%.

Drug reimbursement by the National Health Fund in March was in the amount 958m PLN, 3.6% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in March was 21.4%, grew by 0.1p.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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