



Warszawa, 22.05.2023

MONTHLY REPORT – APRIL 2023

TOTAL OPEN MARKET (SELL-OUT REPORT)

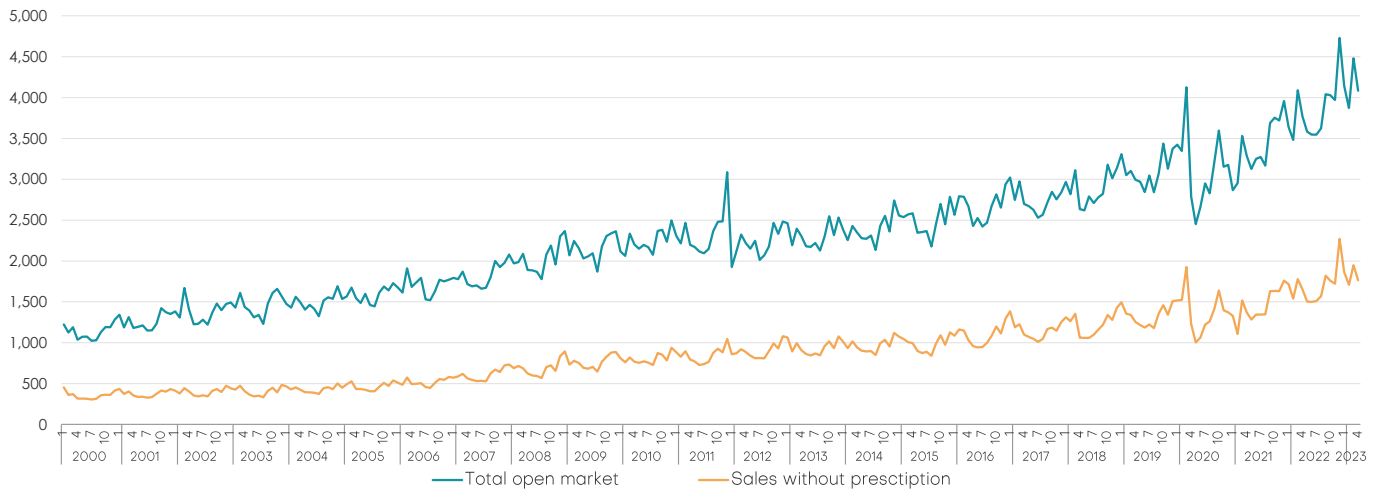
	APRIL 2023	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		MARCH 2023	JANUARY 2023	APRIL 2022	2023	CHANGE VS 2022
TOTAL TURNOVER (PLN MILLION)						
Total open market ¹	4,083	-8.9%	-1.5%	8.4%	16,584	10.7%
Rx reimbursed ²	1,162	-9.0%	1.0%	6.0%	4,695	7.4%
Rx nonreimbursed ³	1,115	-8.2%	2.1%	13.1%	4,446	17.3%
Non Rx products ⁴	1,765	-9.5%	-5.3%	6.9%	7,289	9.0%
REIMBURSEMENT						
Reimbursement value (PLN million)	873	-8.9%	1.0%	5.5%	3,518	6.7%
Reimbursement share In total turnover	21.4%	0.0%	2.5%	-2.6%	21.2%	-3.6%
Reimbursement share In reimbursed sales	69.4%	9.8%	-5.8%	-6.3%	69.6%	-5.9%
AVERAGE PRICE PER PACK (PLN)						
Total ¹	27.8	1.2%	3.2%	10.2%	27.3	10.6%
For reimbursed Rx products ²	31.7	1.3%	1.2%	3.2%	31.4	3.5%
For nonreimbursed Rx products ³	36.6	1.8%	3.8%	12.0%	35.9	12.1%
For Non Rx products ⁴	22.4	0.7%	2.6%	11.4%	22.1	12.0%
AVERAGE MARK-UP						
Total ¹	24.6%	-2.0%	-0.4%	-2.2%	25.2%	-0.7%
For reimbursed Rx products ²	19.1%	-6.8%	-7.5%	10.7%	20.0%	11.0%
For nonreimbursed Rx products ³	19.6%	-10.6%	-8.3%	-11.3%	21.2%	-5.0%
For Non Rx products ⁴	28.9%	-5.3%	-2.9%	-0.5%	30.1%	2.4%
AVERAGE PHARMACY						
Number of patients in pharmacies	4,300	-10.8%	-4.0%	-0.2%	17,780	4.7%
Total turnover (PLN thousand) ¹	319	-8.9%	-1.1%	10.4%	1,294	12.8%

TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

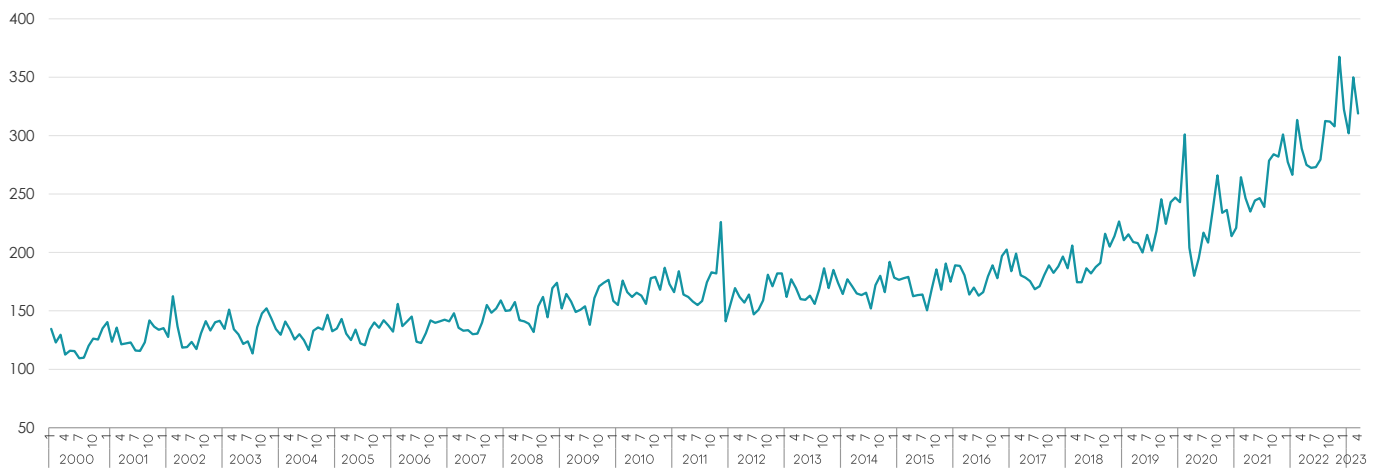
2023	PHARMACY MARKET TOTAL ¹		RX REIMBURSED PRESCRIPTIONS ²		RX NONREIMBURSED PRESCRIPTIONS ³		NON RX PRODUCTS ⁴	
	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022
January	4,145	13.9%	1,151	13.8%	1,092	24.4%	1,865	8.6%
February	8,019	12.6%	2,255	9.9%	2,117	21.1%	3,574	9.8%
March	12,501	11.5%	3,533	7.8%	3,331	18.7%	5,524	9.7%
April	16,584	10.7%	4,695	7.4%	4,446	17.3%	7,289	9.0%
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 THOUSAND



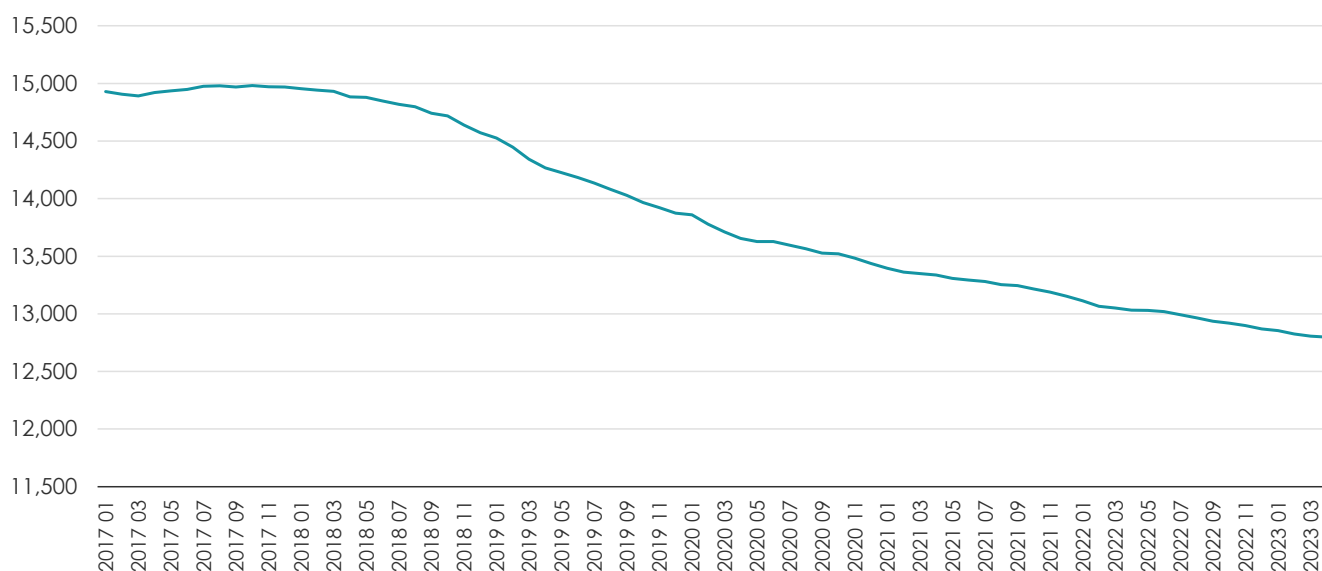
AVERAGE PHARMACY

	APRIL'23		YTD'2021		MARCH'23		CHANGE		APRIL'22		CHANGE		YTD'2020		CHANGE	
	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%
TOTAL TURNOVER (THOUSAND PLN)																
Total open market ¹	319	1,294	350	-31.0	-8.9%	289	30.0	10.4%	1,147	147.0	12.8%					
Rx reimbursed ²	91	366	100	-8.9	-9.0%	84	6.7	7.9%	335	31.5	9.4%					
Rx nonreimbursed ³	87	347	95	-7.7	-8.2%	76	11.5	15.2%	290	56.6	19.5%					
Non Rx products ⁴	138	568	152	-14.3	-9.4%	127	11.2	8.9%	512	56.8	11.1%					
AVERAGE PRICE⁵ PER PACK (PLN)																
Total ¹	28	27	27.4	0.3	1.2%	25.2	2.6	10.2%	24.7	2.6	10.6%					
For reimbursed Rx products ²	32	31	31.3	0.4	1.3%	30.7	1.0	3.2%	30.4	1.0	3.5%					
For nonreimbursed products ³	37	36	35.9	0.7	1.8%	32.7	3.9	12.0%	32.0	3.9	12.1%					
For Non Rx products ⁴	22	22	22.2	0.2	0.7%	20.1	2.3	11.4%	19.7	2.4	12.0%					
AVERAGE MARK-UP*																
Total ¹	24.6%	25.2%	25.1%	-0.5%	-2.0%	25.1%	-0.5%	-2.2%	25.4%	-0.2%	-0.7%					
For reimbursed Rx products ²	19.1%	20.0%	20.5%	-1.4%	-6.8%	17.3%	1.8%	10.7%	18.0%	2.0%	11.0%					
For nonreimbursed Rx products ³	19.6%	21.2%	21.9%	-2.3%	-10.6%	22.1%	-2.5%	-11.3%	22.3%	-1.1%	-5.0%					
For Non Rx products ⁴	28.9%	30.1%	30.5%	-1.6%	-5.3%	29.1%	-0.1%	-0.5%	29.4%	0.7%	2.4%					
NUMBER OF PATIENTS																
Total ¹	4,300	17,780	4,820	-520	-10.8%	4,310	-10	-0.2%	16,980	800	4.7%					
For reimbursed Rx products ²	910	3,750	1,020	-110	-10.8%	990	-80	-8.1%	3,660	90	2.5%					
For nonreimbursed Rx products ³	1,000	4,130	1,130	-130	-11.5%	950	50	5.3%	3,690	440	11.9%					
For Non Rx products ⁴	3,480	14,420	3,900	-420	-10.8%	3,470	10	0.3%	13,840	580	4.2%					
NUMBER OF PHARMACIES - SUMMARY[#]																
	12,799	51,285	12,806	-7	-0.1%	13,033	-234	-1.8%	52,262	-977	-1.9%					

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

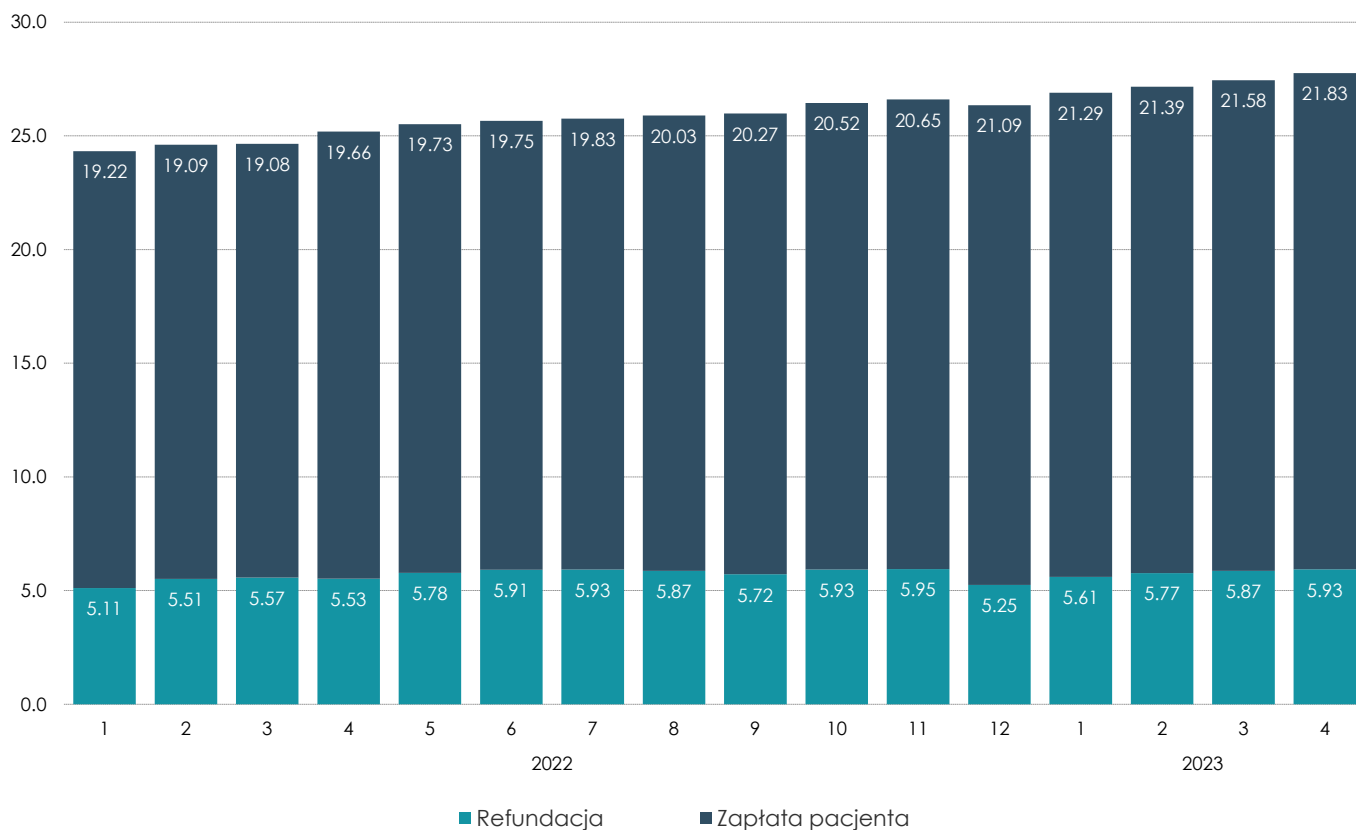
Number of pharmacies based on PEX's analysis.

PHARMACIES ON THE OPEN MARKET



PRICE

STRUCTURE OF THE AVERAGE RETAIL 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 April 2023 saw sales go close to 4,082.9m PLN. Value of sales compared to April 2022 grew by 316.3m PLN (+8.4%). Compared to March of 2023, sales fell by approximately 399.2m PLN (-8.9%).

Compared to the same period of 2022 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 65.6m PLN (+6%), sales based on non-reimbursed prescriptions grew by 129.2m PLN (+13.1%), the non-prescription segment grew by 113.9m PLN (+6.9%).

Compared to the previous month, the value of tracked segments fell for all monitored segments. Value of reimbursed prescriptions fell by 115.1m PLN (-9%), value of non-reimbursed RX drugs fell by 99.7m PLN (-8.2%) and value of products sold without a prescriptions fell by 184.5m PLN (-9.5%).

The average retail drug price in April 2023 was 27.8 PLN and was 1.2% higher than the average price in the previous month, and 10.2% higher than the average price in April 2022. The average retail price of reimbursed prescription was 31.7 PLN (+3.2% vs April 2022), 36.6 PLN for non-reimbursed prescriptions (+12% vs April 2022) and 22.4 PLN for products sold without a prescription (+11.4% vs April 2022).

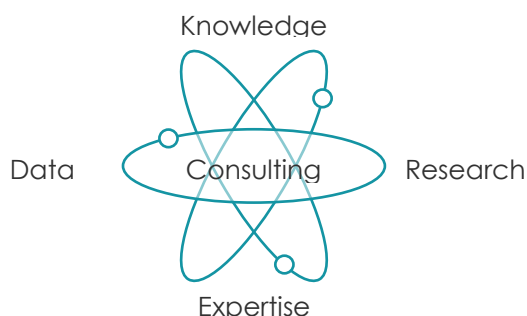
Average pharmacy margin for all drugs in April 2023 was 24.6% and was lower by 2.2% than margin in the same period of 2022. Compared to March 2023, the average pharmacy margin was lower by 2%.

Drug reimbursement by the National Health Fund in April was in the amount 873m PLN, 5.5% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in April was 21.4% and remained at the previous month's level.

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 **50+ 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 22nd of May 2023,
prepared by Antoni Bremer
based on PEX PharmaSequence data.

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PEX PharmaSequence Sp. z o.o.
ul. Migdałowa 4D lok. 46, 02-796 Warszawa
tel.: (+48) 22 886 47 15
fax (+48) 22 638 21 29
biuro@pexps.pl

