



Warsaw, July 2023

MONTHLY REPORT – JUNE 2023

TOTAL OPEN MARKET (SELL-OUT REPORT)

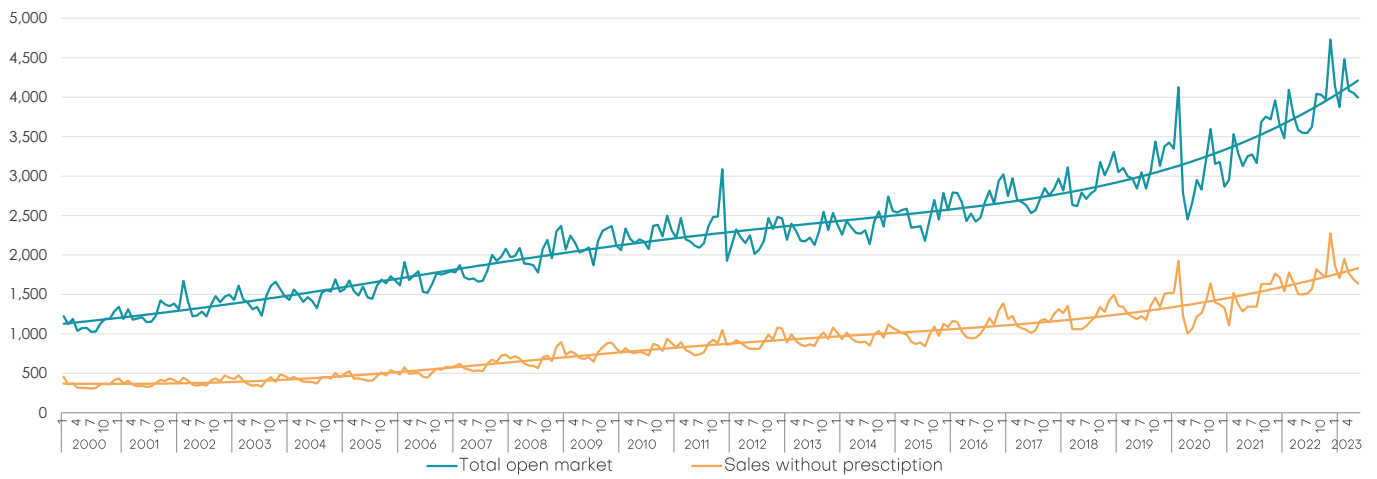
	JUNE 2023	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		MAY 2023	JANUARY 2023	JUNE 2022	2023	CHANGE VS 2022
TOTAL TURNOVER (PLN MILLION)						
Total open market ¹	3,996	-1.4%	-3.6%	12.6%	24,635	11.4%
Rx reimbursed ²	1,197	0.3%	3.9%	10.9%	7,085	8.5%
Rx nonreimbursed ³	1,124	-0.3%	2.9%	20.1%	6,696	17.5%
Non Rx products ⁴	1,636	-3.4%	-12.3%	9.1%	10,618	9.6%
REIMBURSEMENT						
Reimbursement value (PLN million)	906	0.6%	4.9%	10.9%	5,325	8.1%
Reimbursement share In total turnover	22.7%	2.1%	8.8%	-1.6%	21.6%	-3.0%
Reimbursement share In reimbursed sales	67.0%	-0.5%	-9.0%	-10.0%	68.8%	-7.2%
AVERAGE PRICE PER PACK (PLN)						
Total ¹	28.1	0.8%	4.4%	9.4%	27.5	10.2%
For reimbursed Rx products ²	31.7	0.7%	1.2%	3.5%	31.5	3.4%
For nonreimbursed Rx products ³	37.1	1.5%	5.3%	11.2%	36.2	11.8%
For Non Rx products ⁴	22.3	-0.4%	2.0%	10.3%	22.2	11.4%
AVERAGE MARK-UP						
Total ¹	23.9%	-4.1%	-3.3%	-5.5%	24.9%	-1.4%
For reimbursed Rx products ²	19.1%	-2.9%	-7.7%	6.0%	19.8%	10.0%
For nonreimbursed Rx products ³	19.2%	-4.4%	-10.2%	-17.2%	20.7%	-8.1%
For Non Rx products ⁴	28.0%	-3.3%	-6.0%	-5.4%	29.6%	0.6%
AVERAGE PHARMACY						
Number of patients in pharmacies	4,140	-1.0%	-7.6%	2.7%	26,100	3.9%
Total turnover (PLN thousand) ¹	314	-1.3%	-2.6%	15.2%	1,926	13.7%

TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

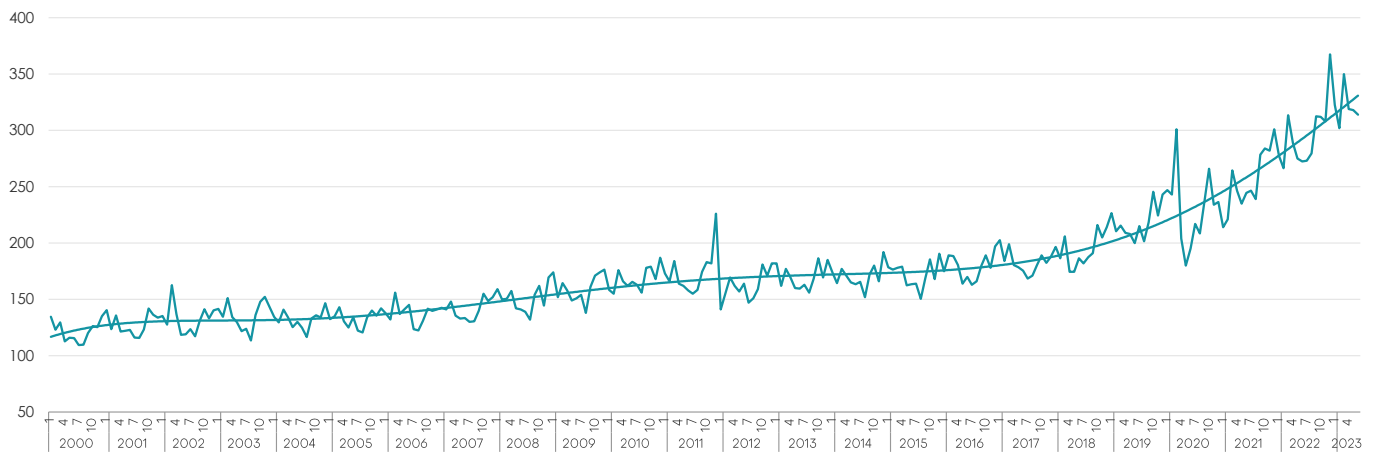
2023	PHARMACY MARKET TOTAL ¹		RX REIMBURSED PRESCRIPTIONS ²		RX NONREIMBURSED PRESCRIPTIONS ³		NON RX PRODUCTS ⁴	
	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022
January	4,145	13.9%	1,151	13.8%	1,092	24.4%	1,865	8.6%
February	8,019	12.6%	2,255	9.9%	2,117	21.1%	3,574	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	20,638	11.2%	5,889	8.1%	5,573	17.0%	8,982	9.7%
June	24,635	11.4%	7,085	8.5%	6,696	17.5%	10,618	9.6%
July								
August								
September								
October								
November								
December								

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN THOUSAND



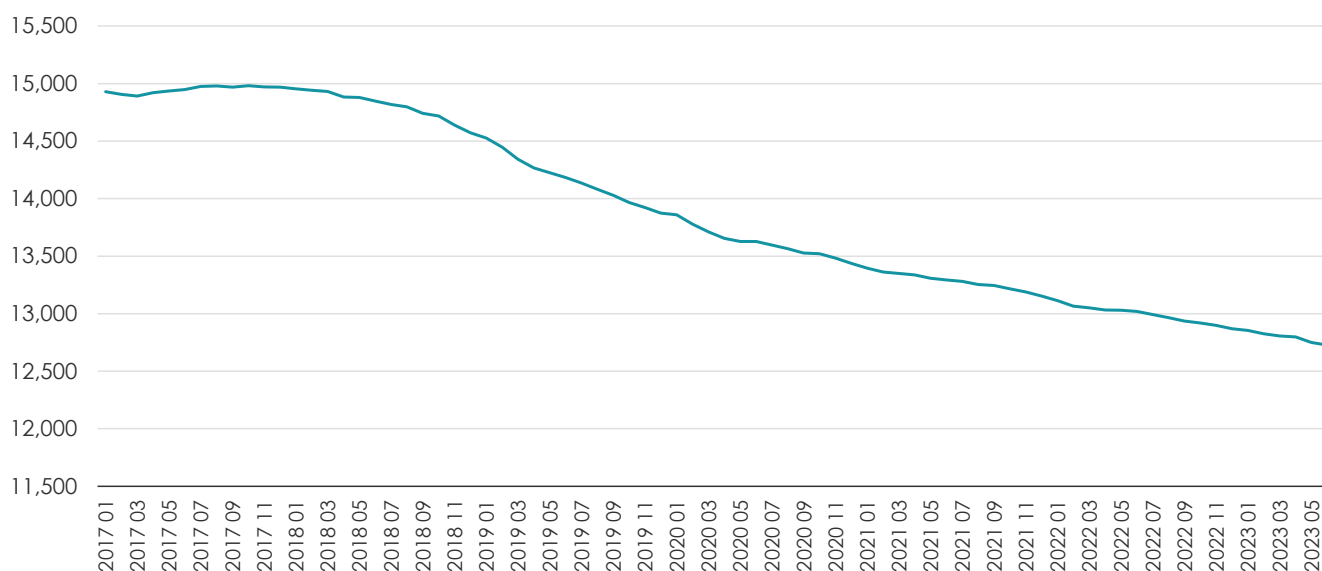
AVERAGE PHARMACY

	JUNE'23	YTD'2021	MAY'23	CHANGE		JUNE'22	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
TOTAL TURNOVER (THOUSAND PLN)											
Total open market ¹	314	1,926	318	-4.0	-1.3%	273	41.5	15.2%	1,694	231.5	13.7%
Rx reimbursed ²	94	554	94	0.4	0.5%	83	11.1	13.4%	500	53.7	10.7%
Rx nonreimbursed ³	88	523	88	-0.1	-0.1%	72	16.4	22.8%	437	86.8	19.9%
Non Rx products ⁴	129	830	133	-4.3	-3.2%	115	13.3	11.6%	742	87.5	11.8%
AVERAGE PRICE⁵ PER PACK (PLN)											
Total ¹	28	28	27.9	0.2	0.8%	25.7	2.4	9.4%	25.0	2.5	10.2%
For reimbursed Rx products ²	32	31	31.4	0.2	0.7%	30.6	1.1	3.5%	30.4	1.0	3.4%
For nonreimbursed products ³	37	36	36.6	0.5	1.5%	33.4	3.8	11.2%	32.4	3.8	11.8%
For Non Rx products ⁴	22	22	22.4	-0.1	-0.4%	20.2	2.1	10.3%	19.9	2.3	11.4%
AVERAGE MARK-UP*											
Total ¹	23.9%	24.9%	24.9%	-1.0%	-4.1%	25.3%	-1.4%	-5.5%	25.3%	-0.3%	-1.4%
For reimbursed Rx products ²	19.1%	19.8%	19.7%	-0.6%	-2.9%	18.0%	1.1%	6.0%	18.0%	1.8%	10.0%
For nonreimbursed Rx products ³	19.2%	20.7%	20.1%	-0.9%	-4.4%	23.2%	-4.0%	-17.2%	22.5%	-1.8%	-8.1%
For Non Rx products ⁴	28.0%	29.6%	29.0%	-1.0%	-3.3%	29.6%	-1.6%	-5.4%	29.4%	0.2%	0.6%
NUMBER OF PATIENTS											
Total ¹	4,140	26,100	4,180	-40	-1.0%	4,030	110	2.7%	25,130	970	3.9%
For reimbursed Rx products ²	910	5,570	910	0	0.0%	970	-60	-6.2%	5,600	-30	-0.5%
For nonreimbursed Rx products ³	970	6,120	1,020	-50	-4.9%	910	60	6.6%	5,520	600	10.9%
For Non Rx products ⁴	3,300	21,070	3,350	-50	-1.5%	3,180	120	3.8%	20,290	780	3.8%
NUMBER OF PHARMACIES - SUMMARY[#]											
	12,727	76,762	12,750	-23	-0.2%	13,019	-292	-2.2%	78,311	-1,549	-2.0%

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

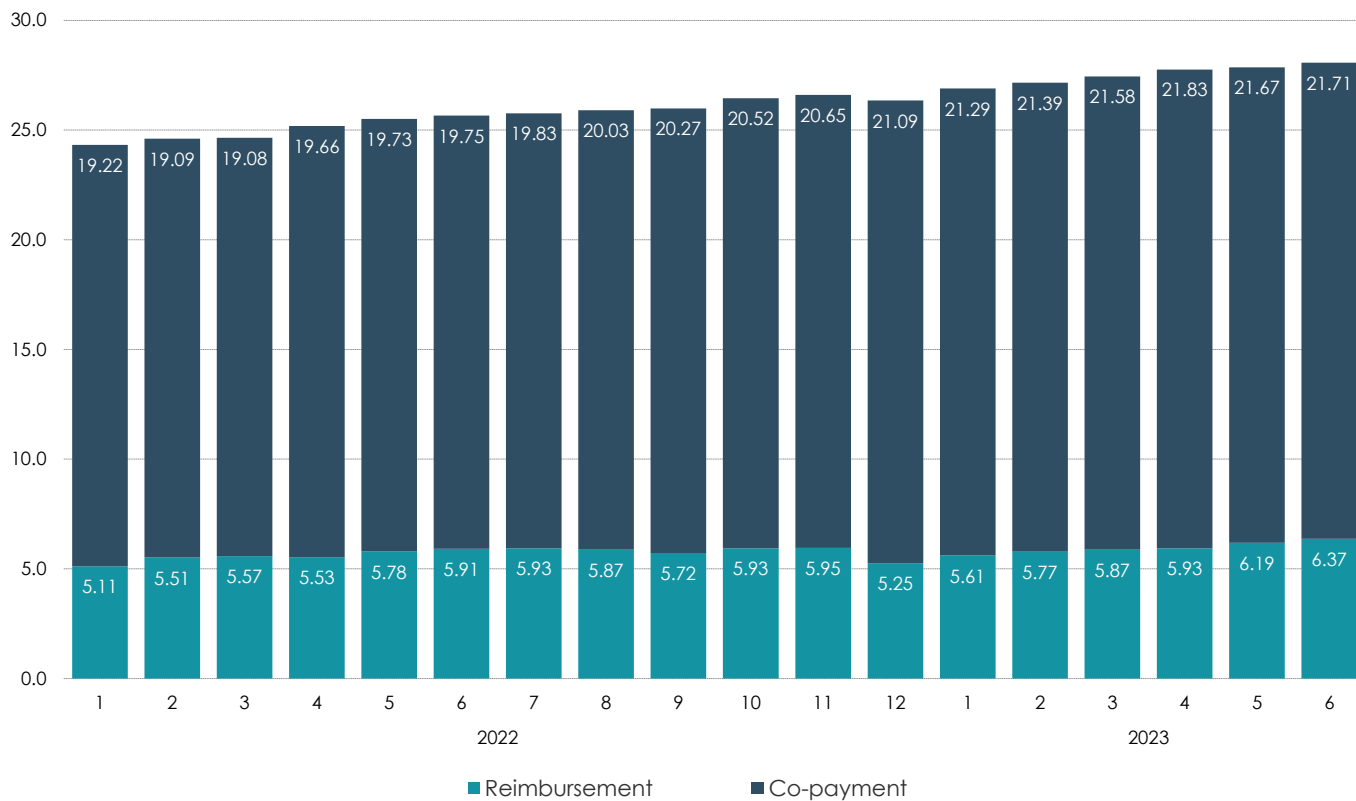
Number of pharmacies based on PEX's analysis.

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 June 2023 saw sales go close to 3,996.3m PLN. Value of sales compared to June 2022 grew by 448.6m PLN (+12.6%). Compared to May of 2023, sales fell by approximately 58.2m PLN (-1.4%).

Compared to the same period of 2022 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 117.2m PLN (+10.9%), sales based on non-reimbursed prescriptions grew by 187.8m PLN (+20.1%), the non-prescription segment grew by 136.1m PLN (+9.1%).

Compared to the previous month, the value of tracked segments grew for one monitored segments. Value of reimbursed prescriptions grew by 3.3m PLN (+0.3%), value of non-reimbursed RX drugs fell by 3.1m PLN (-0.3%) and value of products sold without a prescriptions fell by 57.7m PLN (-3.4%).

The average retail drug price in June 2023 was 28.1 PLN and was 0.8% higher than the average price in the previous month, and 9.4% higher than the average price in June 2022. The average retail price of reimbursed prescription was 31.7 PLN (+3.5% vs June 2022), 37.1 PLN for non-reimbursed prescriptions (+11.2% vs June 2022) and 22.3 PLN for products sold without a prescription (+10.3% vs June 2022).

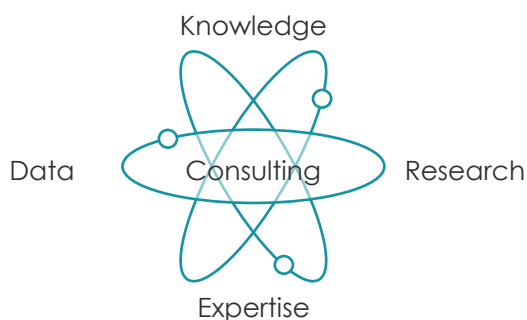
Average pharmacy margin for all drugs in June 2023 was 23.9% and was lower by 5.5% than margin in the same period of 2022. Compared to May 2023, the average pharmacy margin was lower by 4.1%.

Drug reimbursement by the National Health Fund in June was in the amount 906m PLN, 10.9% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in June was 22.7%, grew by 0.5 p.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 **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:

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Published on the 17th of July 2023,
prepared by Antoni Bremer
based on PEX PharmaSequence data.

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