
pex PharmaSequence

Warsaw, August 2023

# MONTHLY REPORT – JULY 2023

# TOTAL OPEN MARKET (SELL-OUT REPORT)

| | JULY 2023 | CHANGE IN COMPARISON TO JUNE 2023 | JANUARY 2023 | JULY 2022 | CUMULATIVE YTD 2023 | CHANGE VS 2022 |
|---|---|---|---|---|---|---|
| **TOTAL TURNOVER (PLN MILLION)** | | | | | | |
| Total open market [1] | 3,864 | -3.3% | -6.8% | 8.9% | 28,499 | 11.1% |
| Rx reimbursed [2] | 1,143 | -4.5% | -0.7% | 6.2% | 8,228 | 8.2% |
| Rx nonreimbursed [3] | 962 | -14.4% | -11.9% | 4.2% | 7,659 | 15.7% |
| Non Rx products [4] | 1,717 | 5.0% | -7.9% | 13.6% | 12,335 | 10.1% |
| **REIMBURSEMENT** | | | | | | |
| Reimbursement value (PLN million) | 866 | -4.4% | 0.2% | 6.1% | 6,191 | 7.8% |
| Reimbursement share In total turnover | 22.4% | -1.2% | 7.5% | -2.6% | 21.7% | -2.9% |
| Reimbursement share In reimbursed sales | 70.1% | 4.6% | -4.8% | -5.8% | 69.0% | -7.0% |
| **AVERAGE PRICE PER PACK (PLN)** | | | | | | |
| Total [1] | 28.3 | 0.8% | 5.2% | 9.9% | 27.6 | 10.1% |
| For reimbursed Rx products [2] | 32.2 | 1.5% | 2.8% | 4.5% | 31.6 | 3.6% |
| For nonreimbursed Rx products [3] | 33.5 | -9.6% | -4.8% | -1.2% | 35.8 | 9.8% |
| For Non Rx products [4] | 24.2 | 8.4% | 10.6% | 19.4% | 22.5 | 12.6% |
| **AVERAGE MARK-UP** | | | | | | |
| Total [1] | 25.1% | 5.0% | 1.6% | 0.9% | 24.9% | -1.1% |
| For reimbursed Rx products [2] | 19.8% | 3.4% | -4.5% | 11.6% | 19.8% | 10.2% |
| For nonreimbursed Rx products [3] | 19.1% | -0.7% | -10.9% | -10.6% | 20.4% | -8.5% |
| For Non Rx products [4] | 29.4% | 5.1% | -1.2% | -1.1% | 29.5% | 0.4% |
| **AVERAGE PHARMACY** | | | | | | |
| Number of patients in pharmacies | 4,070 | -1.7% | -9.2% | 1.2% | 30,170 | 3.5% |
| Total turnover (PLN thousand) [1] | 304 | -3.2% | -5.7% | 11.4% | 2,230 | 13.3% |

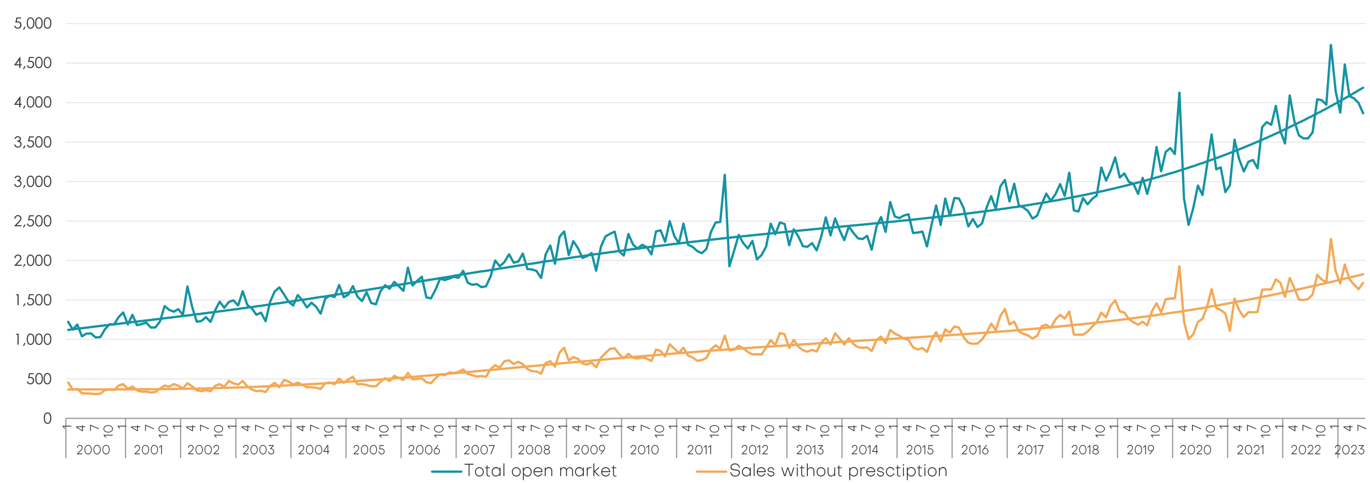
## TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

| 2023 | PHARMACY MARKET TOTAL [1] TOTAL | CHANGE VS 2022 | RX REIMBURSED PRESCRIPTIONS [2] TOTAL | CHANGE VS 2022 | RX NONREIMBURSED PRESCRIPTIONS [3] TOTAL | CHANGE VS 2022 | NON RX PRODUCTS [4] 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 | 28,499 | 11.1% | 8,228 | 8.2% | 7,659 | 15.7% | 12,335 | 10.1% |
| August | | | | | | | | |
| September | | | | | | | | |
| October | | | | | | | | |
| November | | | | | | | | |
| December | | | | | | | | |

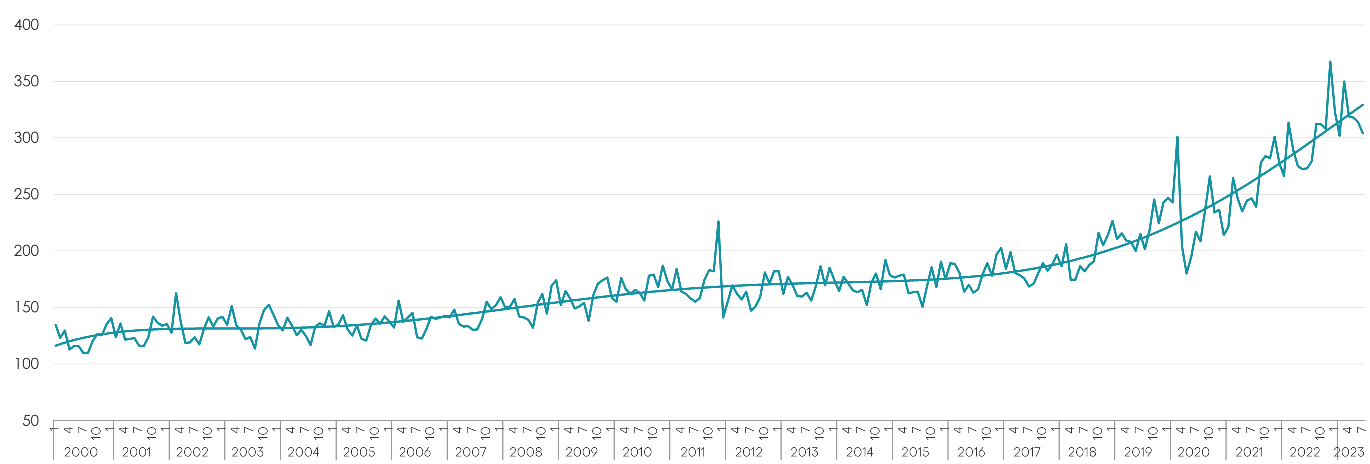
Retail sales in PLN

## TRENDS

### TOTAL MONTHLY PHARMACY SALES IN PLN MILLION




### TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN THOUSAND



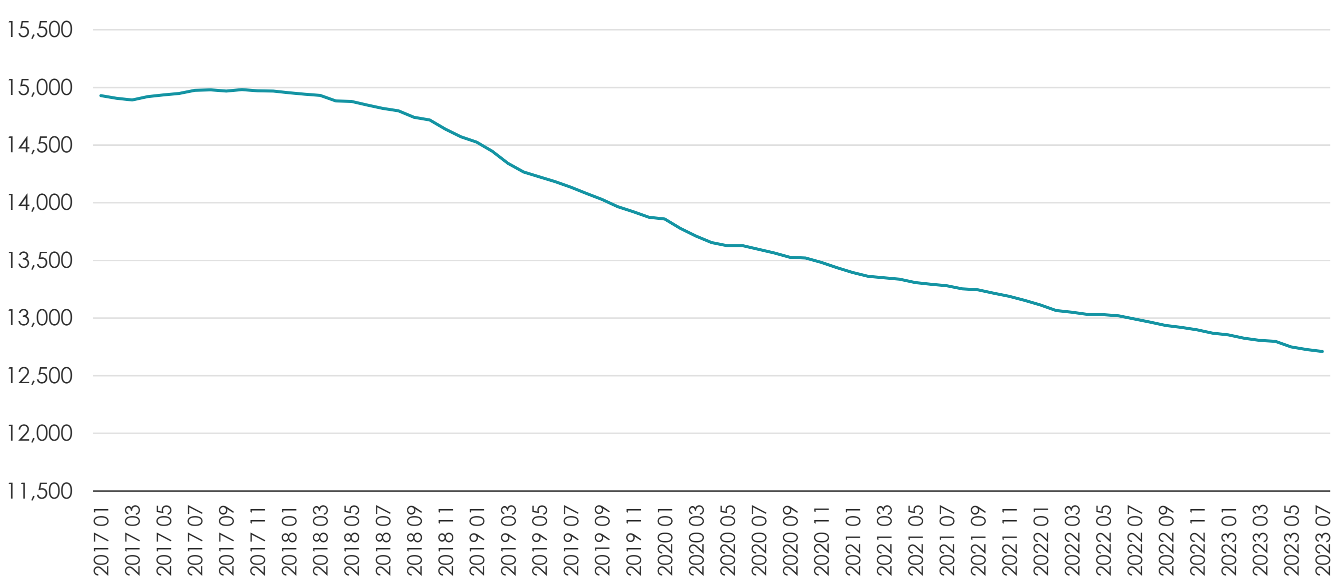
# AVERAGE PHARMACY

| | JULY'23 | YTD'2021 | JUNE'23 | CHANGE | | JULY'22 | CHANGE | | YTD'2020 | CHANGE | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | VALUE | % | | VALUE | % | | VALUE | % |
| **TOTAL TURNOVER (THOUSAND PLN)** | | | | | | | | | | | |
| Total open market [1] | 304 | 2,230 | 314 | -10.0 | -3.2% | 273 | 31.0 | 11.4% | 1,967 | 262.5 | 13.3% |
| Rx reimbursed [2] | 90 | 644 | 94 | -4.1 | -4.4% | 83 | 7.1 | 8.5% | 583 | 60.7 | 10.4% |
| Rx nonreimbursed [3] | 76 | 599 | 88 | -12.6 | -14.3% | 71 | 4.6 | 6.5% | 508 | 91.5 | 18.0% |
| Non Rx products [4] | 135 | 965 | 129 | 6.6 | 5.1% | 116 | 18.7 | 16.1% | 859 | 106.3 | 12.4% |
| **AVERAGE PRICE[5] PER PACK (PLN)** | | | | | | | | | | | |
| Total [1] | 28 | 28 | 28.1 | 0.2 | 0.8% | 25.8 | 2.5 | 9.9% | 25.1 | 2.5 | 10.1% |
| For reimbursed Rx products [2] | 32 | 32 | 31.7 | 0.5 | 1.5% | 30.8 | 1.4 | 4.5% | 30.5 | 1.1 | 3.6% |
| For nonreimbursed products [3] | 34 | 36 | 37.1 | -3.6 | -9.6% | 33.9 | -0.4 | -1.2% | 32.6 | 3.2 | 9.8% |
| For Non Rx products [4] | 24 | 22 | 22.3 | 1.9 | 8.4% | 20.2 | 3.9 | 19.4% | 19.9 | 2.5 | 12.6% |
| **AVERAGE MARK-UP*** | | | | | | | | | | | |
| Total [1] | 25.1% | 24.9% | 23.9% | 1.2% | 5.0% | 24.9% | 0.2% | 0.9% | 25.2% | -0.3% | -1.1% |
| For reimbursed Rx products [2] | 19.8% | 19.8% | 19.1% | 0.7% | 3.4% | 17.7% | 2.1% | 11.6% | 17.9% | 1.8% | 10.2% |
| For nonreimbursed Rx products [3] | 19.1% | 20.4% | 19.2% | -0.1% | -0.7% | 21.3% | -2.3% | -10.6% | 22.3% | -1.9% | -8.5% |
| For Non Rx products [4] | 29.4% | 29.5% | 28.0% | 1.4% | 5.1% | 29.8% | -0.3% | -1.1% | 29.4% | 0.1% | 0.4% |
| **NUMBER OF PATIENTS** | | | | | | | | | | | |
| Total [1] | 4,070 | 30,170 | 4,140 | -70 | -1.7% | 4,020 | 50 | 1.2% | 29,150 | 1,020 | 3.5% |
| For reimbursed Rx products [2] | 870 | 6,440 | 910 | -40 | -4.4% | 830 | 40 | 4.8% | 6,430 | 10 | 0.2% |
| For nonreimbursed Rx products [3] | 930 | 7,050 | 970 | -40 | -4.1% | 870 | 60 | 6.9% | 6,390 | 660 | 10.3% |
| For Non Rx products [4] | 3,250 | 24,320 | 3,300 | -50 | -1.5% | 3,270 | -20 | -0.6% | 23,560 | 760 | 3.2% |
| **NUMBER OF PHARMACIES - SUMMARY#** | 12,711 | 89,473 | 12,727 | -16 | -0.1% | 12,993 | -282 | -2.2% | 91,304 | -1,831 | -2.0% |

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

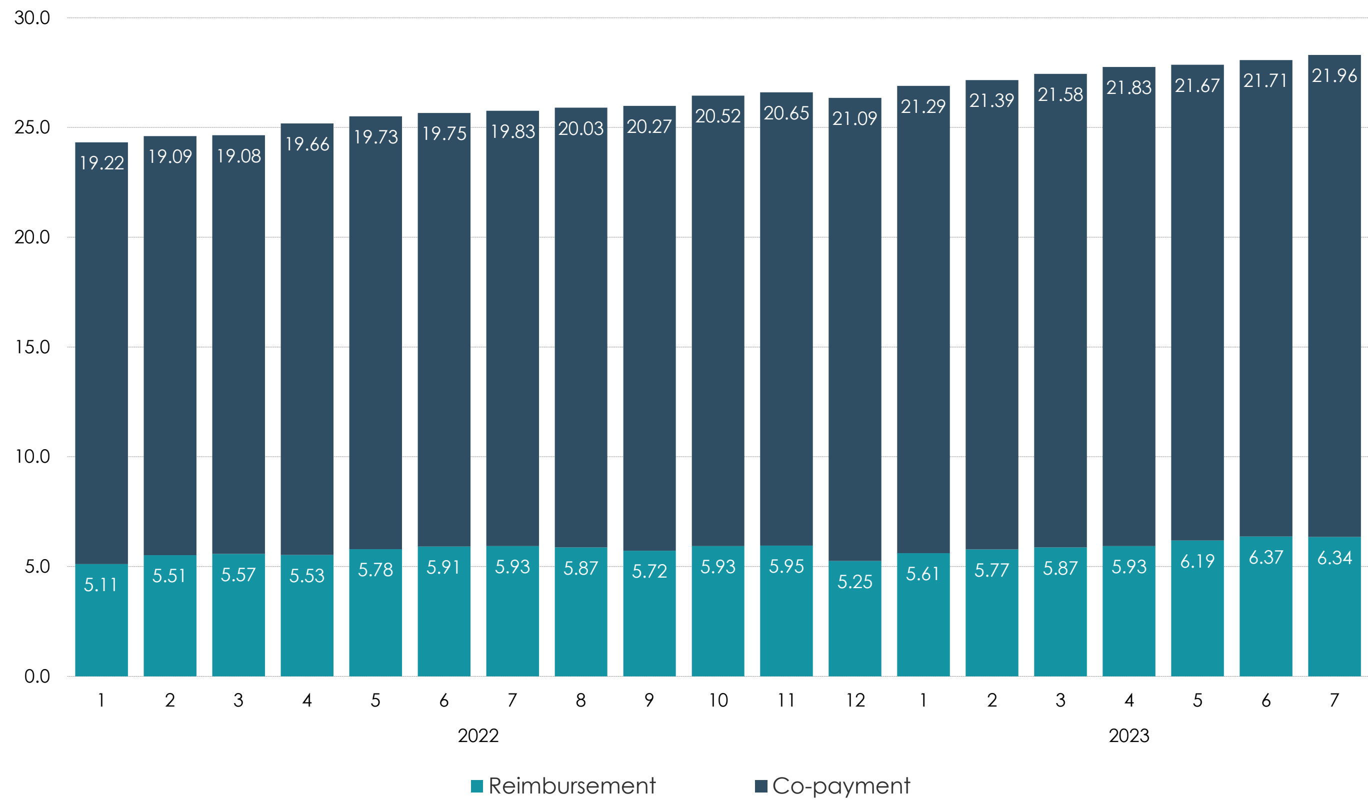
# Number of pharmacies  based on PEX's analysis.

## PHARMACIES ON THE OPEN MARKET



# PRICE

## STRUCTURE OF THE AVERAGE RETAIL 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 July 2023** saw sales go close to 3,864.1m PLN. Value of sales compared to July 2022 grew by 317.1m PLN (+8.9%). Compared to June of 2023, sales fell by approximately 132.1m PLN (-3.3%).

**Compared to the same period of 2022** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 66.4m PLN (+6.2%), sales based on non-reimbursed prescriptions grew by 39m PLN (+4.2%), the non-prescription segment grew by 205.2m PLN (+13.6%).

**Compared to the previous month**, the value of tracked segments grew for one monitored segments. Value of reimbursed prescriptions fell by 53.8m PLN (-4.5%), value of non-reimbursed RX drugs fell by 161.6m PLN (-14.4%) and value of products sold without a prescriptions grew by 81.3m PLN (+5%).

**The average retail drug price in July 2023** was 28.3 PLN and was 0.8% higher than the average price in the previous month, and 9.9% higher than the average price in July 2022. The average retail price of reimbursed prescription was 32.2 PLN (+4.5% vs July 2022), 33.5 PLN for non-reimbursed prescriptions (1.2% vs July 2022) and 24.2 PLN for products sold without a prescription (+19.4% vs July 2022).

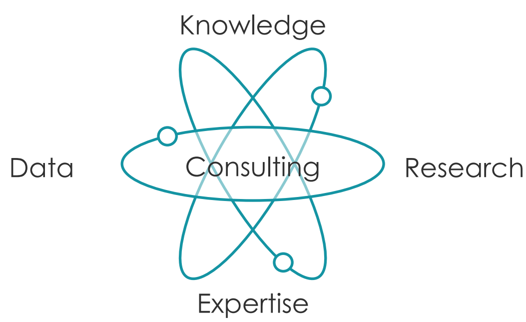
**Average pharmacy margin for all drugs in July 2023** was 25.1% and was higher by 0.9% than margin in the same period of 2022. Compared to June 2023, the average pharmacy margin was higher by 5%.

**Drug reimbursement by the National Health Fund in July** was in the amount 866m PLN, 6.1% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in July was 22.4%, fell by 0.3p.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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