



Warsaw, September 2023

# MONTHLY REPORT – AUGUST 2023

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## TOTAL OPEN MARKET (SELL-OUT REPORT)

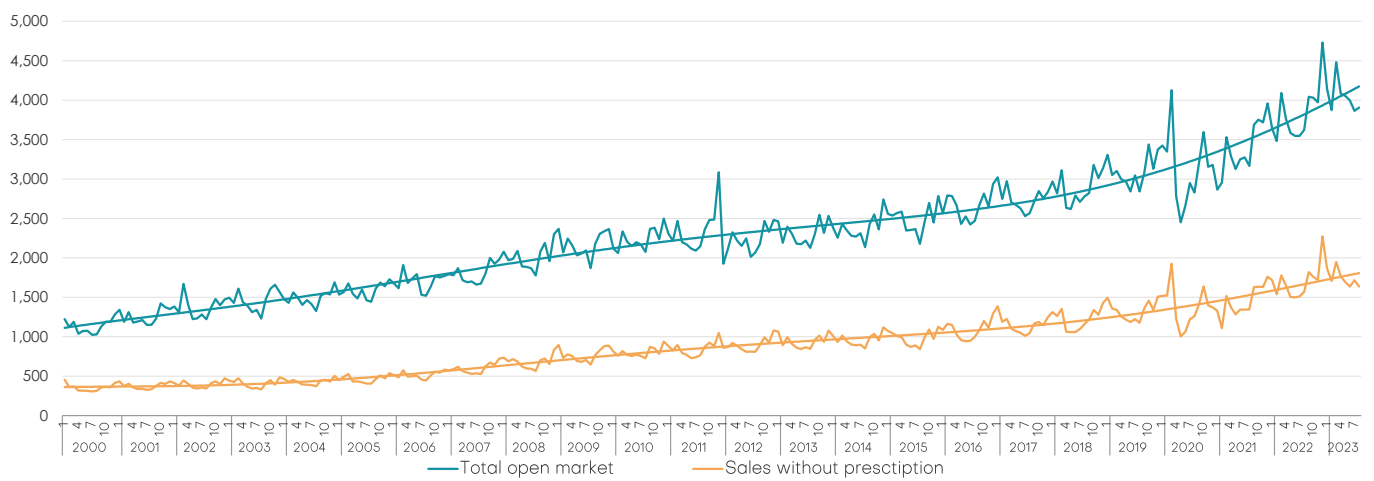
	AUGUST 2023	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		JULY 2023	JANUARY 2023	AUGUST 2022	2023	CHANGE VS 2022
<b>TOTAL TURNOVER (PLN MILLION)</b>						
Total open market <sup>1</sup>	3,905	1.1%	-5.8%	7.8%	32,404	10.7%
Rx reimbursed <sup>2</sup>	1,143	0.0%	-0.7%	6.1%	9,372	7.9%
Rx nonreimbursed <sup>3</sup>	1,086	12.8%	-0.6%	15.3%	8,744	15.6%
Non Rx products <sup>4</sup>	1,635	-4.8%	-12.3%	4.2%	13,970	9.4%
<b>REIMBURSEMENT</b>						
Reimbursement value (PLN million)	871	0.5%	0.7%	6.0%	7,062	7.6%
Reimbursement share In total turnover	22.3%	-0.5%	7.0%	-1.6%	21.8%	-2.8%
Reimbursement share In reimbursed sales	70.0%	-0.1%	-5.0%	-6.4%	69.1%	-6.9%
<b>AVERAGE PRICE PER PACK (PLN)</b>						
Total <sup>1</sup>	28.4	0.3%	5.6%	9.6%	27.7	10.1%
For reimbursed Rx products <sup>2</sup>	32.0	-0.7%	2.1%	4.3%	31.6	3.7%
For nonreimbursed Rx products <sup>3</sup>	38.2	14.0%	8.5%	11.3%	36.1	10.0%
For Non Rx products <sup>4</sup>	22.6	-6.5%	3.4%	10.4%	22.5	12.3%
<b>AVERAGE MARK-UP</b>						
Total <sup>1</sup>	25.7%	2.6%	4.2%	0.5%	25.0%	-0.9%
For reimbursed Rx products <sup>2</sup>	19.7%	-0.4%	-4.9%	7.0%	19.8%	9.8%
For nonreimbursed Rx products <sup>3</sup>	19.2%	0.9%	-10.1%	-10.9%	20.3%	-8.8%
For Non Rx products <sup>4</sup>	31.9%	8.4%	7.1%	3.6%	29.8%	0.8%
<b>AVERAGE PHARMACY</b>						
Number of patients in pharmacies	4,100	0.7%	-8.5%	0.7%	34,270	3.2%
Total turnover (PLN thousand) <sup>1</sup>	308	1.2%	-4.7%	10.0%	2,537	12.9%

## TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

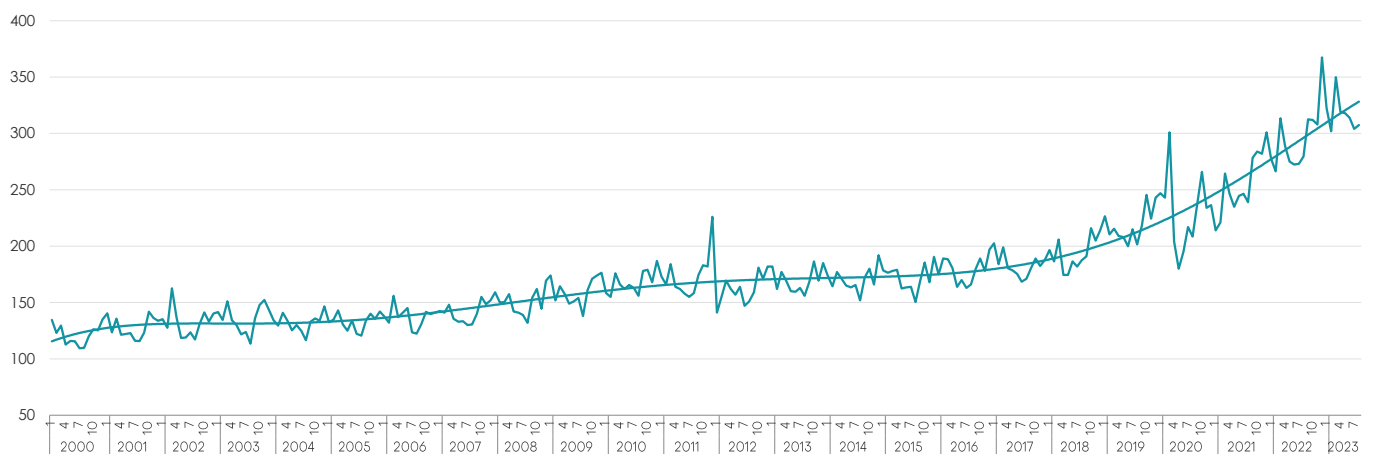
2023	PHARMACY MARKET TOTAL <sup>1</sup>		RX REIMBURSED PRESCRIPTIONS <sup>2</sup>		RX NONREIMBURSED PRESCRIPTIONS <sup>3</sup>		NON RX PRODUCTS <sup>4</sup>	
	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022
January	4,145	13.9%	1,151	13.8%	1,092	24.4%	1,865	8.6%
February	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	28,499	11.1%	8,228	8.2%	7,659	15.7%	12,335	10.1%
August	32,404	10.7%	9,372	7.9%	8,744	15.6%	13,970	9.4%
September								
October								
November								
December								

## TRENDS

### TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



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



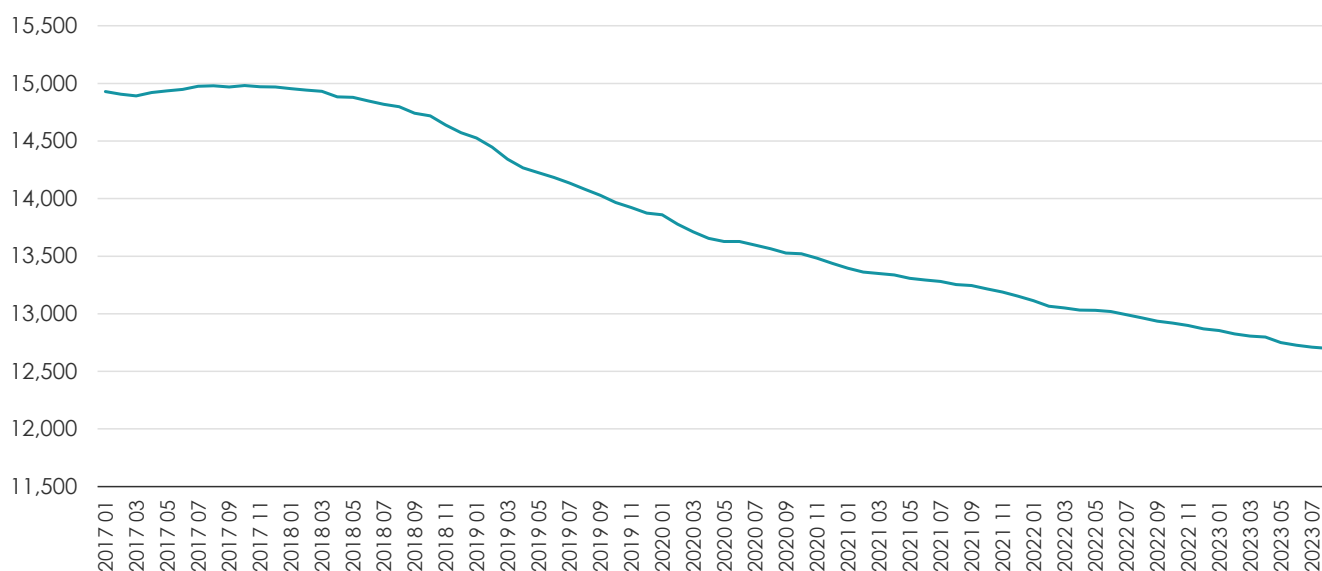
## AVERAGE PHARMACY

	AUGUST'23	YTD'2021	JULY'23	CHANGE		AUGUST'22	CHANGE		YTD'2020	CHANGE	
				VALUE	%		VALUE	%		VALUE	%
<b>TOTAL TURNOVER (THOUSAND PLN)</b>											
Total open market <sup>1</sup>	308	2,537	304	3.5	1.2%	280	28.0	10.0%	2,247	290.5	12.9%
Rx reimbursed <sup>2</sup>	90	734	90	0.1	0.1%	83	6.9	8.3%	666	67.6	10.1%
Rx nonreimbursed <sup>3</sup>	85	685	76	9.8	12.9%	73	12.9	17.7%	580	104.4	18.0%
Non Rx products <sup>4</sup>	129	1,094	135	-6.3	-4.7%	121	7.7	6.4%	980	114.0	11.6%
<b>AVERAGE PRICE<sup>5</sup> PER PACK (PLN)</b>											
Total <sup>1</sup>	28	28	28.3	0.1	0.3%	25.9	2.5	9.6%	25.2	2.5	10.1%
For reimbursed Rx products <sup>2</sup>	32	32	32.2	-0.2	-0.7%	30.6	1.3	4.3%	30.5	1.1	3.7%
For nonreimbursed products <sup>3</sup>	38	36	33.5	4.7	14.0%	34.4	3.9	11.3%	32.8	3.3	10.0%
For Non Rx products <sup>4</sup>	23	22	24.2	-1.6	-6.5%	20.4	2.1	10.4%	20.0	2.5	12.3%
<b>AVERAGE MARK-UP*</b>											
Total <sup>1</sup>	25.7%	25.0%	25.1%	0.7%	2.6%	25.6%	0.1%	0.5%	25.3%	-0.2%	-0.9%
For reimbursed Rx products <sup>2</sup>	19.7%	19.8%	19.8%	-0.1%	-0.4%	18.4%	1.3%	7.0%	18.0%	1.8%	9.8%
For nonreimbursed Rx products <sup>3</sup>	19.2%	20.3%	19.1%	0.2%	0.9%	21.6%	-2.4%	-10.9%	22.2%	-1.9%	-8.8%
For Non Rx products <sup>4</sup>	31.9%	29.8%	29.4%	2.5%	8.4%	30.8%	1.1%	3.6%	29.6%	0.2%	0.8%
<b>NUMBER OF PATIENTS</b>											
Total <sup>1</sup>	4,100	34,270	4,070	30	0.7%	4,070	30	0.7%	33,220	1,050	3.2%
For reimbursed Rx products <sup>2</sup>	870	7,310	870	0	0.0%	830	40	4.8%	7,260	50	0.7%
For nonreimbursed Rx products <sup>3</sup>	920	7,970	930	-10	-1.1%	870	50	5.7%	7,260	710	9.8%
For Non Rx products <sup>4</sup>	3,270	27,590	3,250	20	0.6%	3,320	-50	-1.5%	26,880	710	2.6%
<b>NUMBER OF PHARMACIES - SUMMARY#</b>											
	12,699	102,172	12,711	-12	-0.1%	12,965	-266	-2.1%	104,269	-2,097	-2.0%

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

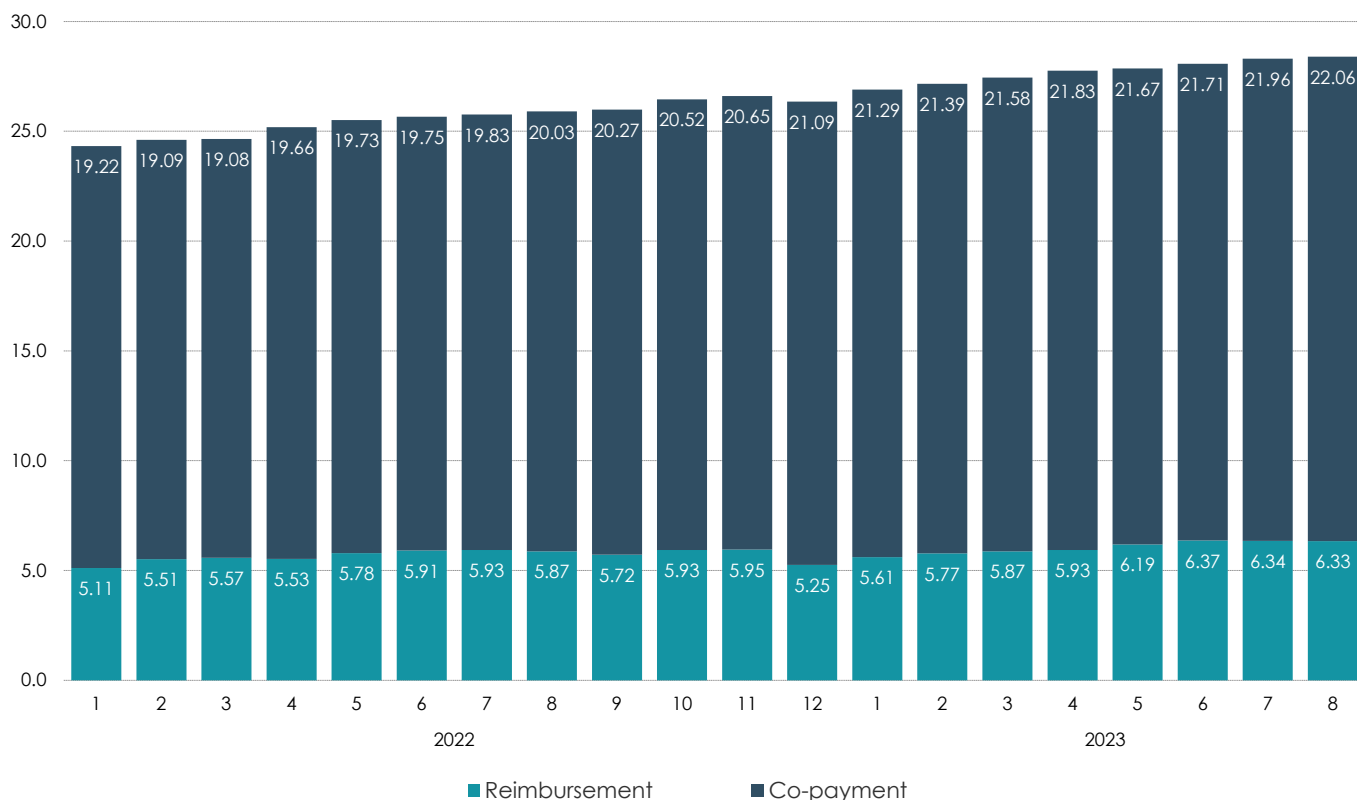
# Number of pharmacies based on PEX's analysis.

## PHARMACIES ON THE OPEN MARKET



# PRICE

## STRUCTURE OF THE AVERAGE RETAIL PRICE<sup>5</sup>



### All amounts are retail open pharmacy sales in PLN

Most important terms:

<sup>1</sup> Total open pharmacy market sales

<sup>2</sup> Total sales of Rx products covered by NHF reimbursement

<sup>3</sup> Total sales of Rx products not covered by NHF reimbursement

<sup>4</sup> Total sales of products available without prescription, including OTC medicines, food supplements, herbs, patches, medical devices, etc.

<sup>5</sup> 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.

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## PEX PHARMASEQUENCE COMMENTARY

**The pharmacy market in August 2023** saw sales go close to 3,904.9m PLN. Value of sales compared to August 2022 grew by 281.2m PLN (+7.8%). Compared to July of 2023, sales grew by approximately 40.8m PLN (+1.1%).

**Compared to the same period of 2022** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 65.4m PLN (+6.1%), sales based on non-reimbursed prescriptions grew by 144.2m PLN (+15.3%), the non-prescription segment grew by 65.6m PLN (+4.2%).

**Compared to the previous month**, the value of tracked segments grew for two monitored segments. Value of reimbursed prescriptions grew by 0.5m PLN (+0,05%), value of non-reimbursed RX drugs grew by 123.4m PLN (+12.8%) and value of products sold without a prescriptions fell by 81.9m PLN (-4.8%).

**The average retail drug price in August 2023** was 28.4 PLN and was 0.3% higher than the average price in the previous month, and 9.6% higher than the average price in August 2022. The average retail price of reimbursed prescription was 32 PLN (+4.3% vs August 2022), 38.2 PLN for non-reimbursed prescriptions (+11.3% vs August 2022) and 22.6 PLN for products sold without a prescription (+10.4% vs August 2022).

**Average pharmacy margin for all drugs in August 2023** was 25.7% and was higher by 0.5% than margin in the same period of 2022. Compared to July 2023, the average pharmacy margin was higher by 2.6%.

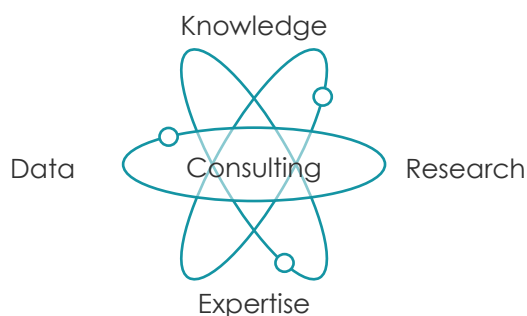
**Drug reimbursement by the National Health Fund in August** was in the amount 871m PLN, 6% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in August was 77.7%, grew by 0.1p.p. compared to previous month.

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## 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](http://www.pexps.pl) more info



**Ask us a question:**

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