



Warsaw, November 2023

# MONTHLY REPORT – OCTOBER 2023

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## TOTAL OPEN MARKET (SELL-OUT REPORT)

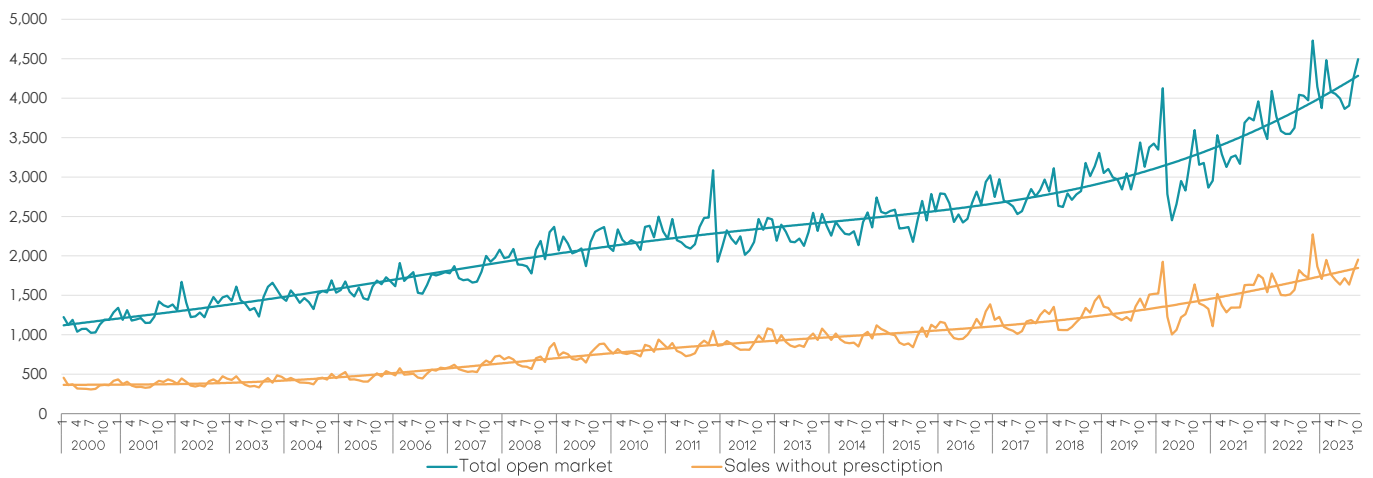
	OCTOBER 2023	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		SEPTEMBER 2023	JANUARY 2023	OCTOBER 2022	2023	CHANGE VS 2022
<b>TOTAL TURNOVER (PLN MILLION)</b>						
Total open market <sup>1</sup>	4,494	5.5%	8.4%	11.5%	41,156	10.2%
Rx reimbursed <sup>2</sup>	1,315	3.0%	14.2%	9.9%	11,964	8.2%
Rx nonreimbursed <sup>3</sup>	1,183	4.6%	8.4%	14.2%	11,059	15.1%
Non Rx products <sup>4</sup>	1,954	8.1%	4.8%	11.1%	17,731	8.4%
<b>REIMBURSEMENT</b>						
Reimbursement value (PLN million)	1,126	5.3%	30.3%	24.6%	9,257	10.8%
Reimbursement share In total turnover	25.1%	-0.2%	20.2%	11.8%	22.5%	0.5%
Reimbursement share In reimbursed sales	84.2%	2.4%	14.4%	13.7%	75.9%	2.3%
<b>AVERAGE PRICE PER PACK (PLN)</b>						
Total <sup>1</sup>	28.9	0.9%	7.4%	9.2%	27.9	10.0%
For reimbursed Rx products <sup>2</sup>	32.6	1.1%	4.3%	4.0%	31.8	3.7%
For nonreimbursed Rx products <sup>3</sup>	38.3	0.4%	8.8%	11.6%	36.6	10.4%
For Non Rx products <sup>4</sup>	23.4	1.5%	7.0%	10.4%	22.6	11.9%
<b>AVERAGE MARK-UP</b>						
Total <sup>1</sup>	26.7%	4.5%	8.2%	6.0%	25.3%	-0.2%
For reimbursed Rx products <sup>2</sup>	19.9%	-2.8%	-3.9%	2.5%	19.8%	8.3%
For nonreimbursed Rx products <sup>3</sup>	24.1%	21.5%	12.9%	14.4%	20.6%	-6.8%
For Non Rx products <sup>4</sup>	30.6%	0.8%	2.5%	-5.7%	30.0%	0.2%
<b>AVERAGE PHARMACY</b>						
Number of patients in pharmacies	4,570	3.6%	2.0%	3.4%	43,250	2.7%
Total turnover (PLN thousand) <sup>1</sup>	355	5.7%	9.9%	13.6%	3,227	12.4%

## TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

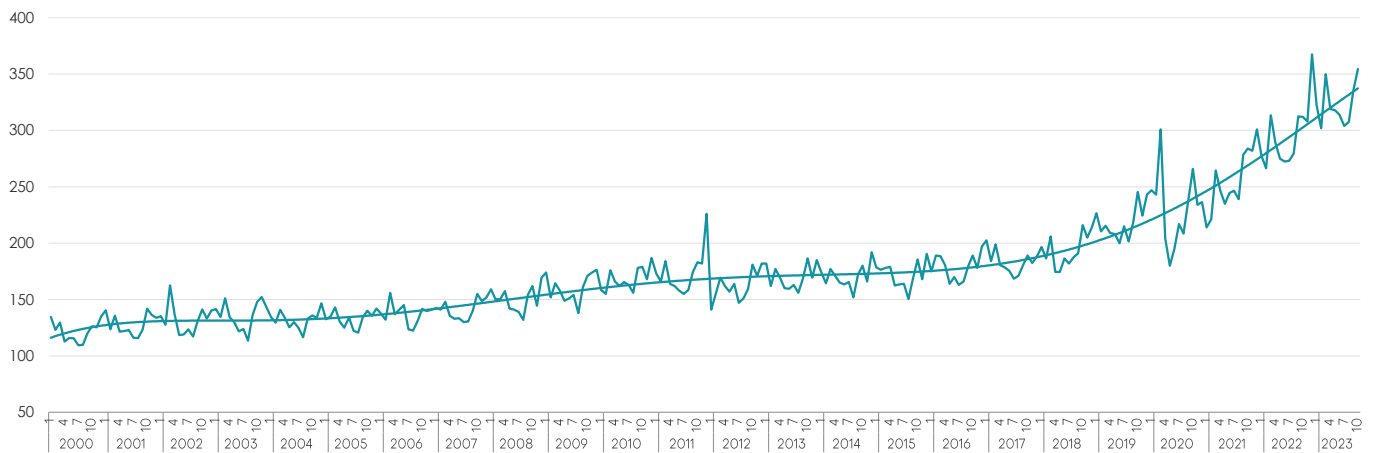
2023	PHARMACY MARKET TOTAL <sup>1</sup>		RX REIMBURSED PRESCRIPTIONS <sup>2</sup>		RX NONREIMBURSED PRESCRIPTIONS <sup>3</sup>		NON RX PRODUCTS <sup>4</sup>	
	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022	TOTAL	CHANGE VS 2022
January	4,145	13.9%	1,151	13.8%	1,092	24.4%	1,865	8.6%
February	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	36,662	10.0%	10,649	8.0%	9,876	15.2%	15,777	8.1%
October	41,156	10.2%	11,964	8.2%	11,059	15.1%	17,731	8.4%
November								
December								

## TRENDS

### TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



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



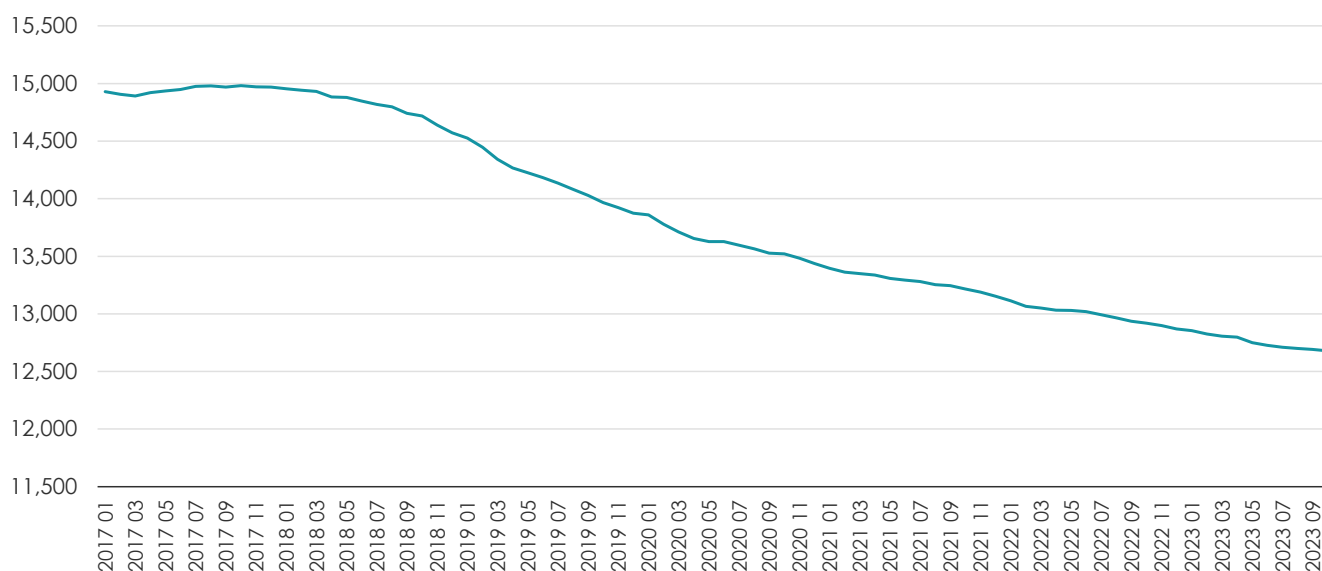
## AVERAGE PHARMACY

	OCTOBER'23		YTD'2021		SEPTEMBER' 23		CHANGE		OCTOBER'22		CHANGE		YTD'2020		CHANGE	
	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%	VALUE	%
<b>TOTAL TURNOVER (THOUSAND PLN)</b>																
Total open market <sup>1</sup>	355	3,227	336	19.0	5.7%	312	42.5	13.6%	2,871	356.0	12.4%					
Rx reimbursed <sup>2</sup>	104	938	101	3.1	3.1%	93	11.1	11.9%	850	88.3	10.4%					
Rx nonreimbursed <sup>3</sup>	93	867	89	4.2	4.7%	80	13.1	16.3%	739	128.6	17.4%					
Non Rx products <sup>4</sup>	154	1,390	142	11.7	8.2%	136	17.9	13.2%	1,257	133.5	10.6%					
<b>AVERAGE PRICE<sup>5</sup> PER PACK (PLN)</b>																
Total <sup>1</sup>	29	28	28.7	0.2	0.9%	26.5	2.4	9.2%	25.4	2.5	10.0%					
For reimbursed Rx products <sup>2</sup>	33	32	32.3	0.4	1.1%	31.4	1.3	4.0%	30.6	1.1	3.7%					
For nonreimbursed products <sup>3</sup>	38	37	38.2	0.2	0.4%	34.3	4.0	11.6%	33.1	3.4	10.4%					
For Non Rx products <sup>4</sup>	23	23	23.0	0.4	1.5%	21.2	2.2	10.4%	20.2	2.4	11.9%					
<b>AVERAGE MARK-UP*</b>																
Total <sup>1</sup>	26.7%	25.3%	25.6%	1.2%	4.5%	25.2%	1.5%	6.0%	25.3%	-0.1%	-0.2%					
For reimbursed Rx products <sup>2</sup>	19.9%	19.8%	20.5%	-0.6%	-2.8%	19.4%	0.5%	2.5%	18.3%	1.5%	8.3%					
For nonreimbursed Rx products <sup>3</sup>	24.1%	20.6%	19.9%	4.3%	21.5%	21.1%	3.0%	14.4%	22.1%	-1.5%	-6.8%					
For Non Rx products <sup>4</sup>	30.6%	30.0%	30.3%	0.2%	0.8%	32.4%	-1.8%	-5.7%	29.9%	0.1%	0.2%					
<b>NUMBER OF PATIENTS</b>																
Total <sup>1</sup>	4,570	43,250	4,410	160	3.6%	4,420	150	3.4%	42,120	1,130	2.7%					
For reimbursed Rx products <sup>2</sup>	1,010	9,290	970	40	4.1%	930	80	8.6%	9,100	190	2.1%					
For nonreimbursed Rx products <sup>3</sup>	930	9,820	920	10	1.1%	980	-50	-5.1%	9,190	630	6.9%					
For Non Rx products <sup>4</sup>	3,680	34,800	3,530	150	4.2%	3,600	80	2.2%	34,170	630	1.8%					
<b>NUMBER OF PHARMACIES - SUMMARY#</b>																
	12,679	127,543	12,692	-13	-0.1%	12,920	-241	-1.9%	130,124	-2,581	-2.0%					

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

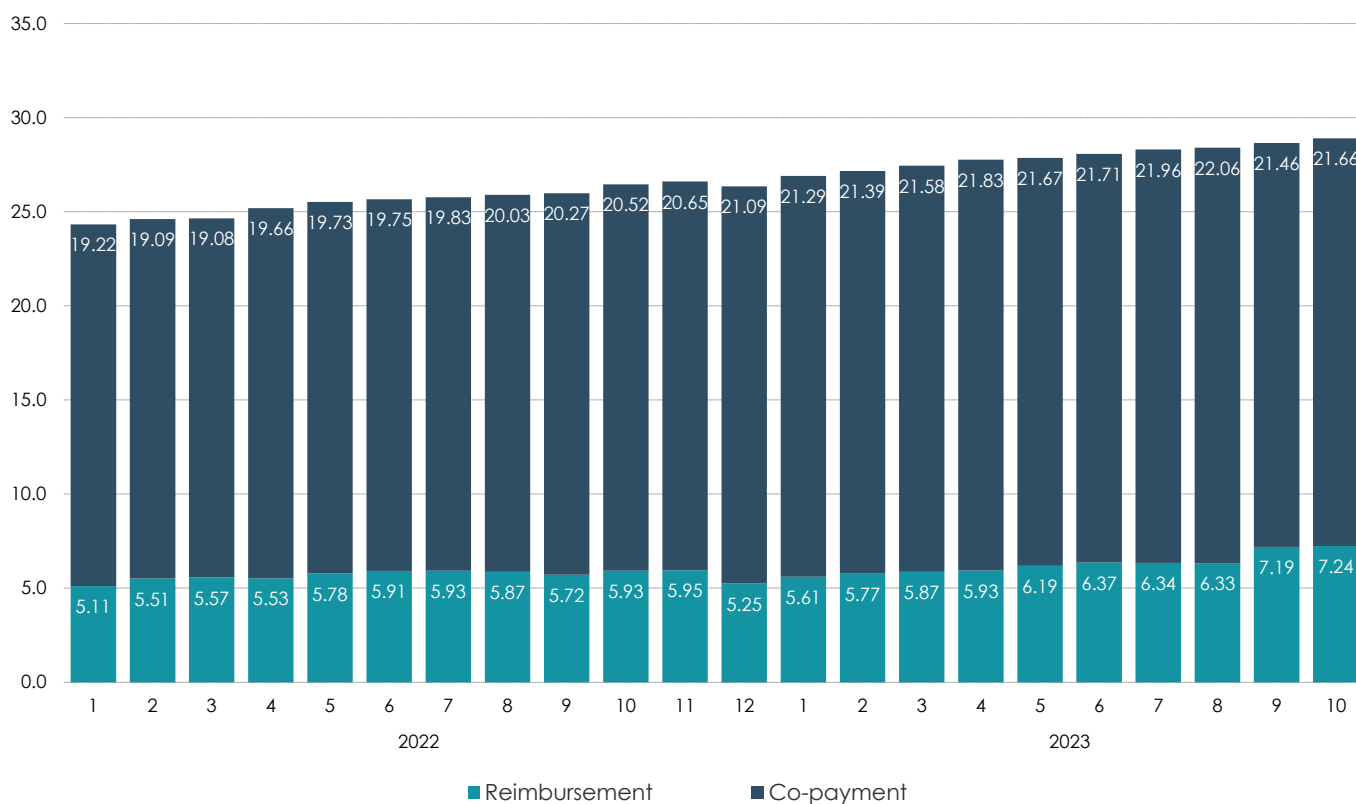
# Number of pharmacies based on PEX's analysis.

## 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 October 2023** saw sales go close to 4,494.4m PLN. Value of sales compared to October 2022 grew by 463.4m PLN (+11.5%). Compared to September of 2023, sales grew by approximately 236.3m PLN (+5.5%).

**Compared to the same period of 2022** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 117.9m PLN (+9.9%), sales based on non-reimbursed prescriptions grew by 146.9m PLN (+14.2%), the non-prescription segment grew by 194.4m PLN (+11.1%).

**Compared to the previous month**, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 37.7m PLN (+3%), value of non-reimbursed RX drugs grew by 51.6m PLN (+4.6%) and value of products sold without a prescriptions grew by 146.9m PLN (+8.1%).

**The average retail drug price in October 2023** was 28.9 PLN and was 0.9% higher than the average price in the previous month, and 9.2% higher than the average price in October 2022. The average retail price of reimbursed prescription was 32.6 PLN (+4% vs October 2022), 38.3 PLN for non-reimbursed prescriptions (+11.6% vs October 2022) and 23.4 PLN for products sold without a prescription (+10.4% vs October 2022).

**Average pharmacy margin for all drugs in October 2023** was 26.7% and was higher by 6% than margin in the same period of 2022. Compared to September 2023, the average pharmacy margin was higher by 4.5%.

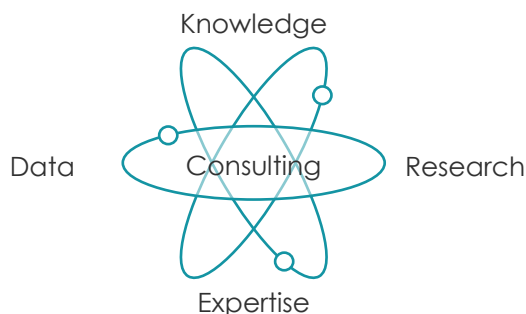
**Drug reimbursement by the National Health Fund in October** was in the amount 1126m PLN, 24.6% more than in the same period of 2022. The level of patient copayment for reimbursed drugs in October was 74.9%, grew by 0,1p.p. compared to previous month.

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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:**  
[solutions\\_by\\_pex@pexps.pl](mailto:solutions_by_pex@pexps.pl)  
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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

