



## PEX PharmaSequence monthly report - March 2020

### Total open market (sell-out report)

	March 2020	Change in comparison to			Cumulative YTD		Forecast		
		February 2020	January 2020	March 2019	2020	Change vs 2019	2020	Change vs 2019	Change vs 2018
<b>Total turnover (PLN million)</b>									
Total open market <sup>1</sup>	<b>4 127</b>	23.3%	20.6%	33.0%	10 898	15.2%	39 364	5.9%	13.8%
Rx reimbursed <sup>2</sup>	<b>1 328</b>	25.3%	19.8%	25.5%	3 496	10.8%	13 149	3.9%	8.0%
Rx nonreimbursed <sup>3</sup>	<b>848</b>	14.1%	10.4%	24.1%	2 361	15.4%	8 804	6.0%	17.2%
Non Rx products <sup>4</sup>	<b>1 927</b>	26.6%	27.0%	43.8%	4 965	18.5%	17 077	7.3%	16.7%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>992</b>	25.0%	19.0%	25.6%	2 619	11.7%	9 993	5.2%	11.9%
Reimbursement share in total turnover	<b>24.0%</b>	1.4%	-1.3%	-5.5%	24.0%	-0.5%	25.4%	-0.6%	-1.7%
Reimbursement share in reimbursed sales	<b>73.8%</b>	0.0%	-0.1%	0.3%	73.8%	1.5%	74.6%	0.9%	3.0%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>21.5</b>	-2.4%	-2.1%	0.9%	21.4	1.4%	21.5	1.0%	3.0%
For reimbursed Rx products <sup>2</sup>	<b>28.8</b>	-1.2%	1.0%	1.9%	28.8	2.4%	29.6	2.9%	5.8%
For nonreimbursed Rx products <sup>3</sup>	<b>27.6</b>	0.0%	1.1%	6.7%	27.6	6.8%	27.4	2.0%	8.0%
For Non Rx products <sup>4</sup>	<b>16.6</b>	-3.1%	-3.1%	1.3%	16.6	2.1%	16.7	-2.4%	5.5%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>25.4%</b>	1.4%	2.9%	2.7%	25.1%	1.2%	24.5%	-0.9%	-2.1%
For reimbursed Rx products <sup>2</sup>	<b>19.8%</b>	3.9%	5.7%	4.4%	19.3%	2.4%	19.1%	-0.4%	2.5%
For nonreimbursed Rx products <sup>3</sup>	<b>21.4%</b>	-2.7%	2.7%	0.2%	21.4%	3.3%	20.5%	-3.3%	-10.5%
For Non Rx products <sup>4</sup>	<b>30.0%</b>	2.1%	2.9%	1.5%	29.5%	-0.8%	27.9%	-4.1%	-5.6%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>4 420</b>	2.6%	1.4%	18.5%	13 090	10.7%	47 982	2.7%	9.5%
Total turnover (PLN thousand) <sup>1</sup>	<b>301</b>	23.9%	21.9%	39.7%	791	21.2%	2 883	10.1%	24.3%

### - Total pharmacy turnover cumulative in PLN million -

	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 2019	Total	Change vs 2019	Total	Change vs 2019	Total	Change vs 2019
<b>2020</b>								
January	3 423	3.5%	1 108	2.7%	769	9.2%	1 517	1.5%
February	6 771	6.5%	2 168	3.4%	1 512	11.1%	3 039	6.6%
March	10 898	15.2%	3 496	10.8%	2 361	15.4%	4 965	18.5%
April								
May								
June								
July								
August								
September								
October								
November								
December								

Retail sales in PLN

PEX PharmaSequence Sp. z o.o.,  
 ul. Kłobucka 23, 02-699 Warszawa  
 tel. 022-886-47-15, fax. 022-638-21-29  
 e-mail: biuro@pexps.pl  
 http://www.pexps.pl

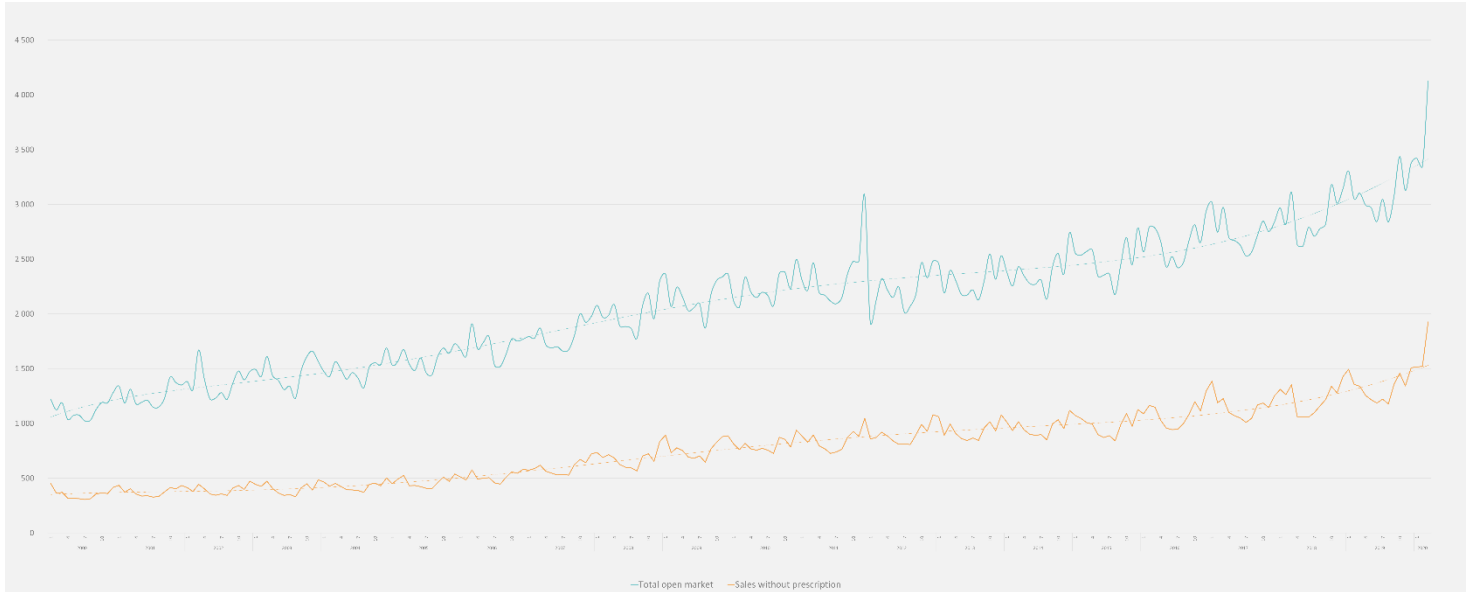
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 1 000 000 zł.



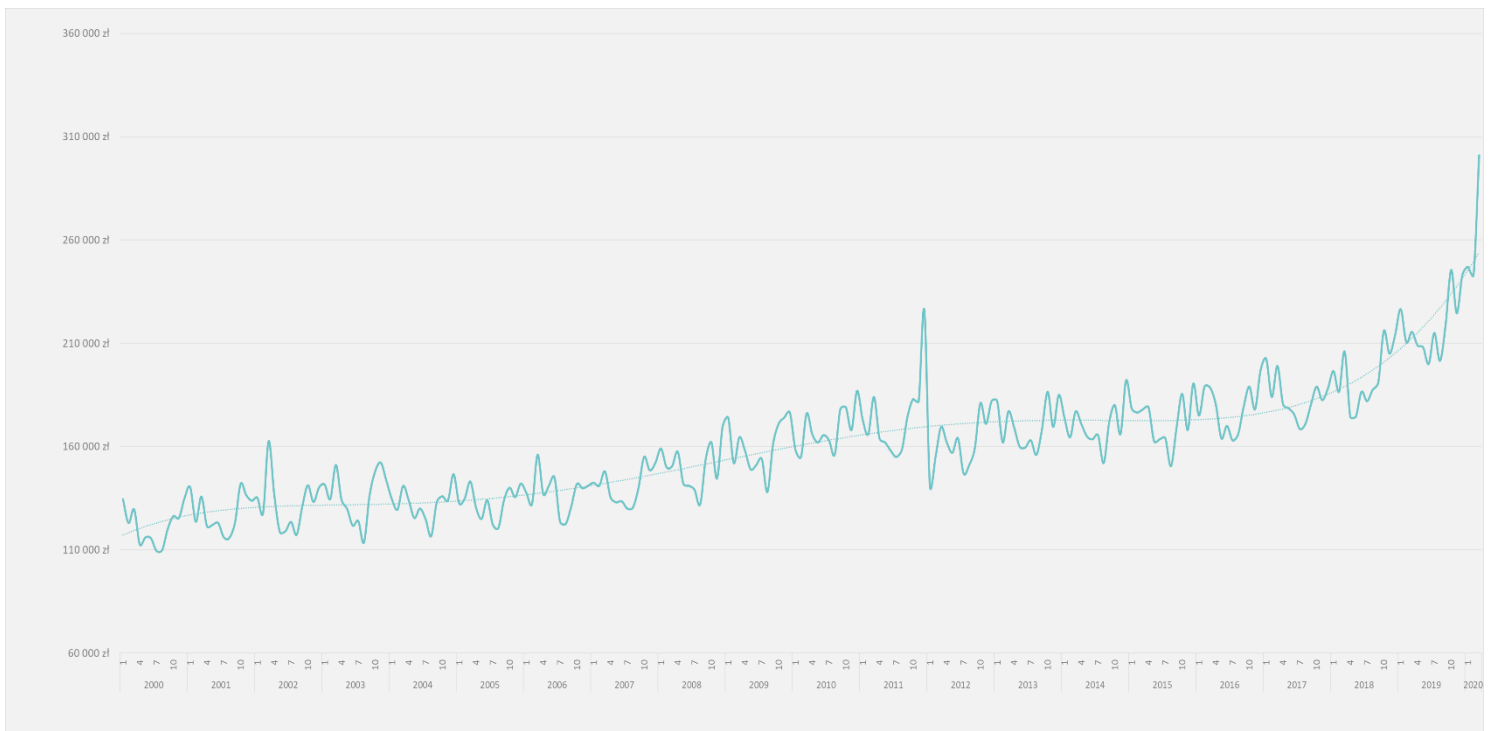
# PEX PharmaSequence monthly report - March 2020

## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



### Retail sales in PLN

PEX PharmaSequence Sp. z o.o.,  
 ul. Kłobucka 23, 02-699 Warszawa  
 tel. 022-886-47-15, fax. 022-638-21-29  
 e-mail: [biuro@pexps.pl](mailto:biuro@pexps.pl)  
<http://www.pexps.pl>

Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 1 000 000 zł



## PEX PharmaSequence monthly report - March 2020

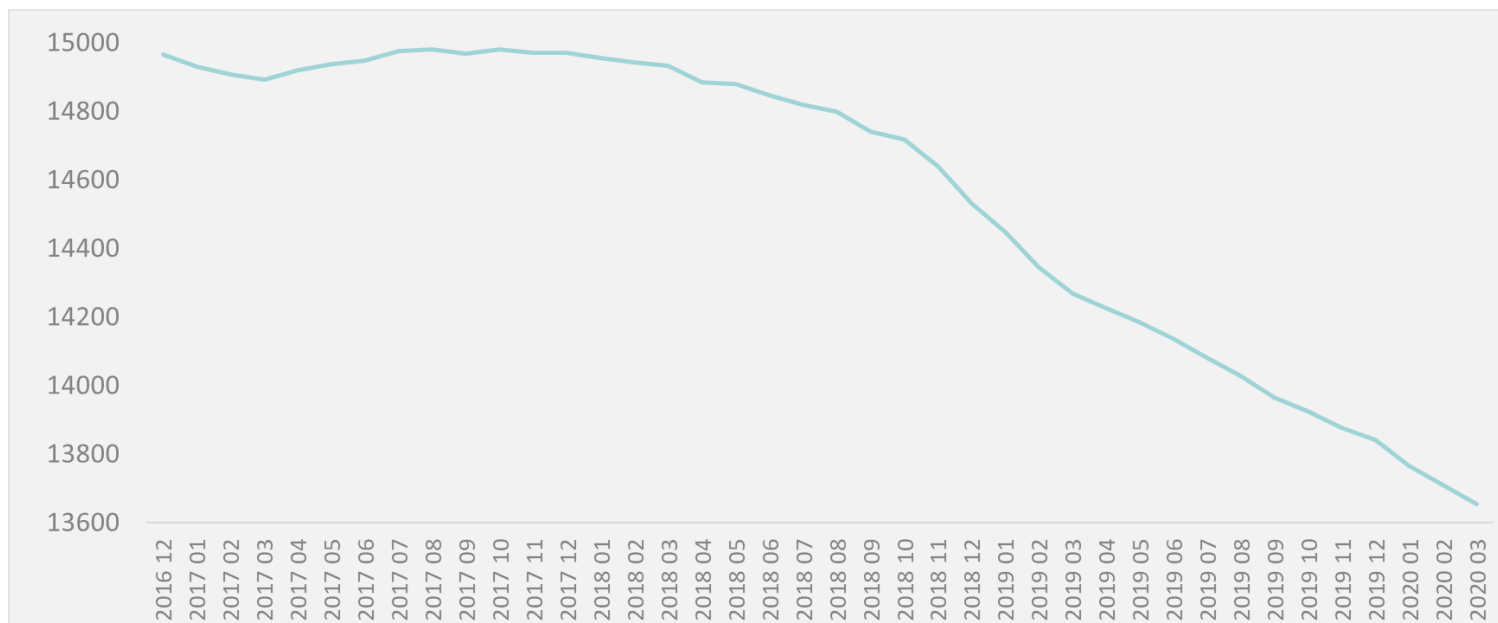
### average pharmacy

	March'20	YTD'2020	February'20		Change		March'19		Change		YTD'2019	Change	
			Value	%	Value	%	Value	%	Value	%			
<b>Total turnover (thousand PLN)</b>													
Total open market <sup>1</sup>	301	791	243	58.0	23.9%	216	85.5	39.7%	653	138.5	21.2%		
Rx reimbursed <sup>2</sup>	97	254	77	19.9	25.9%	74	23.4	31.8%	218	36.1	16.6%		
Rx nonreimbursed <sup>3</sup>	62	171	54	7.9	14.7%	47	14.4	30.4%	141	30.3	21.5%		
Non Rx products <sup>4</sup>	141	360	110	30.1	27.2%	93	47.5	51.1%	289	71.5	24.7%		
<b>Average price <sup>5</sup> per pack (PLN)</b>													
Total <sup>1</sup>	21.5	21.8	22.0	-0.52	-2.4%	21.3	0.2	0.9%	21.1	0.8	3.6%		
For reimbursed Rx products <sup>2</sup>	28.8	28.9	29.2	-0.4	-1.2%	28.3	0.5	1.9%	28.2	0.7	2.5%		
For nonreimbursed products <sup>3</sup>	27.6	27.5	27.6	0.0	0.0%	25.8	1.7	6.7%	25.8	1.6	6.3%		
For Non Rx products <sup>4</sup>	16.6	17.0	17.2	-0.5	-3.1%	16.4	0.2	1.3%	16.3	0.7	4.3%		
<b>Average mark-up*</b>													
Total <sup>1</sup>	25.4%	25.10%	25.1%	0.3%	1.4%	24.8%	0.7%	2.7%	24.8%	0.3%	1.1%		
For reimbursed Rx products <sup>2</sup>	20%	19.2%	19.1%	0.7%	3.9%	19.0%	0.8%	4.4%	18.8%	0.4%	2.3%		
For nonreimbursed Rx products <sup>3</sup>	21%	21.4%	22.0%	-0.6%	-2.7%	21.3%	0.0%	0.2%	20.7%	0.7%	3.4%		
For Non Rx products <sup>4</sup>	30%	29.5%	29.3%	0.6%	2.1%	29.5%	0.4%	1.5%	29.8%	-0.3%	-1.0%		
<b>Number of patients</b>													
Total <sup>1</sup>	4 420	13 090	4 310	110	2.6%	3 730	690	18.5%	11 820	1 270	10.7%		
For reimbursed Rx products <sup>2</sup>	1 010	2 940	950	60	6.3%	740	270	36.5%	2 320	620	26.7%		
For nonreimbursed Rx products <sup>3</sup>	890	2 650	870	20	2.3%	760	130	17.1%	2 360	290	12.3%		
For Non Rx products <sup>4</sup>	3 690	10 760	3 530	160	4.5%	3 110	580	18.6%	9 920	840	8.5%		
<b>Number of pharmacies - summary<sup>#</sup></b>													
	13 654	13 710	13 710	-56	-0.4%	14 267	-613	-4.3%	14 353	-643	-4.5%		

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

<sup>#</sup> Number of pharmacies based on PEX's analysis.

### - Pharmacies on the open market -



# PEX PharmaSequence monthly report - March 2020

## 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 Kamsoft (Omnibus) – they make up 97% of the pharmacy market.

# PEX PharmaSequence monthly report - March 2020

## PEX PharmaSequence commentary

**The pharmacy market** in March 2020 saw sales go close to 4 126.7m PLN. Value of sales compared to March 2019 grew by over 1 023.3m PLN (+33.0%). Compared to February of 2020, sales grew by approximately 778.7m PLN (+23.3%).

**Compared to the same period of 2019** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 269.4m PLN (+25.5%), sales based on non-reimbursed prescriptions grew by 164.8m PLN (+24.1%), the non-prescription segment grew by 587.1m PLN (+43.8%).

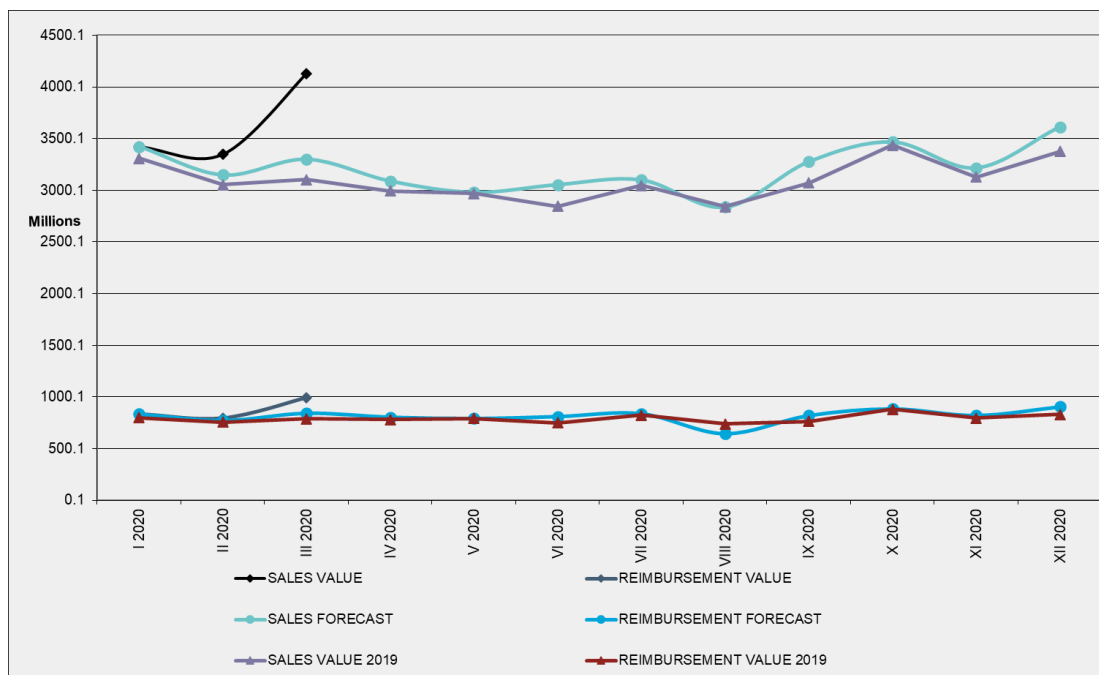
**Compared to the previous month**, value of sales grew for all monitored segments. Value of reimbursed prescriptions grew by 268.2m PLN (+25.3%), value of non-reimbursed Rx drugs grew by 104.8m PLN (+14.1%) and value of products sold without a prescription grew by 404.9m PLN (+26.6%).

**The average retail drug price** in March 2020 was 21.5 PLN and was 2.4% lower than the average price in the previous month, and 0.9% higher than the average price in March 2019. The average retail price of reimbursed prescriptions was 28.8 PLN (+1.9% vs March 2019), 27.6 PLN for non-reimbursed prescriptions (+6.7% vs March 2019) and 16.6 PLN for products sold without a prescription (+1.3% vs March 2019).

**Average pharmacy margin** for all drugs in March 2020 was 25.4% and was higher by 2.7% than margin in the same period of 2019. Compared to February 2020, the average pharmacy margin was higher by 1.4%.

**Drug reimbursement** by the National Health Fund in March was in the amount 992m PLN, 25.6% more than in the same period of 2019. The level of patient copayment for reimbursed drugs in March was 24.0%, grew by 0.3p.p. compared to previous month.

- Monthly turnover value forecast (PLN million, retail gross prices) -

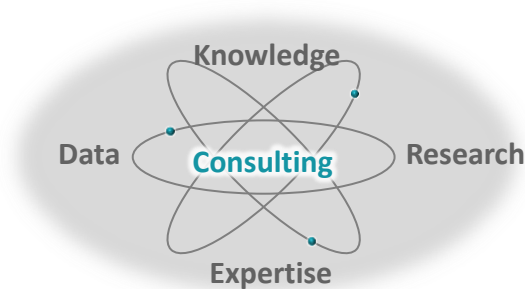


## PEX PharmaSequence monthly report - March 2020

### 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 **60+ 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)  
22 886 47 15

Published on the 20th of April 2020, prepared by Marta Mazurek, Analyst based on PEX PharmaSequence data.

