



## PEX PharmaSequence monthly report - August 2020

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

	August 2020	Change in comparison to			Cumulative YTD		Forecast		
		July 2020	January 2020	August 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>2 828</b>	-4.1%	-17.4%	-0.5%	24 572	1.7%	37 143	-0.1%	7.4%
Rx reimbursed <sup>2</sup>	<b>898</b>	-11.4%	-19.0%	-9.2%	8 154	-2.0%	12 309	-2.8%	1.1%
Rx nonreimbursed <sup>3</sup>	<b>647</b>	-6.2%	-15.9%	-0.9%	5 479	1.4%	8 263	-0.5%	10.0%
Non Rx products <sup>4</sup>	<b>1 261</b>	3.2%	-16.9%	7.0%	10 742	4.8%	16 268	2.2%	11.2%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>681</b>	-11.6%	-18.3%	-7.9%	6 163	-1.0%	9 337	-1.7%	4.5%
Reimbursement share in total turnover	<b>24.1%</b>	-7.8%	-1.1%	-7.5%	25.1%	-2.7%	25.1%	-1.6%	-2.7%
Reimbursement share in reimbursed sales	<b>74.6%</b>	-0.3%	1.0%	1.3%	74.4%	0.9%	74.6%	0.9%	3.0%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>22.7</b>	-0.5%	3.2%	4.6%	21.7	2.8%	21.6	1.8%	3.8%
For reimbursed Rx products <sup>2</sup>	<b>29.0</b>	-0.4%	1.7%	3.1%	29.0	3.1%	29.2	1.4%	4.3%
For nonreimbursed Rx products <sup>3</sup>	<b>29.1</b>	1.2%	6.6%	7.9%	29.1	7.9%	28.6	6.2%	12.5%
For Non Rx products <sup>4</sup>	<b>17.4</b>	0.7%	1.4%	5.2%	17.4	5.2%	17.2	0.8%	9.0%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>25.3%</b>	3.7%	2.1%	1.7%	24.8%	0.6%	24.6%	-0.5%	-1.7%
For reimbursed Rx products <sup>2</sup>	<b>18.9%</b>	-0.2%	0.7%	-1.7%	19.0%	-0.2%	19.0%	-0.9%	1.9%
For nonreimbursed Rx products <sup>3</sup>	<b>21.6%</b>	2.6%	3.6%	3.5%	21.2%	2.0%	20.8%	-1.8%	-9.1%
For Non Rx products <sup>4</sup>	<b>29.9%</b>	4.9%	2.6%	0.1%	29.1%	-0.7%	28.4%	-2.1%	-3.6%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>3 450</b>	-3.6%	-20.9%	-5.5%	29 060	-4.0%	44 675	-4.4%	2.0%
Total turnover (PLN thousand) <sup>1</sup>	<b>209</b>	-3.9%	-15.6%	3.5%	1 796	6.5%	2 728	4.2%	17.6%

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

2020	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
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	13 683	9.8%	4 437	5.7%	2 952	8.5%	6 194	13.7%
May	16 136	4.6%	5 302	1.0%	3 513	3.4%	7 196	8.0%
June	18 793	2.9%	6 244	0.1%	4 143	2.5%	8 259	5.2%
July	21 743	2.0%	7 257	-1.0%	4 832	1.7%	9 481	4.5%
August	24 571	1.7%	8 154	-2.0%	5 479	1.4%	10 742	4.8%
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  
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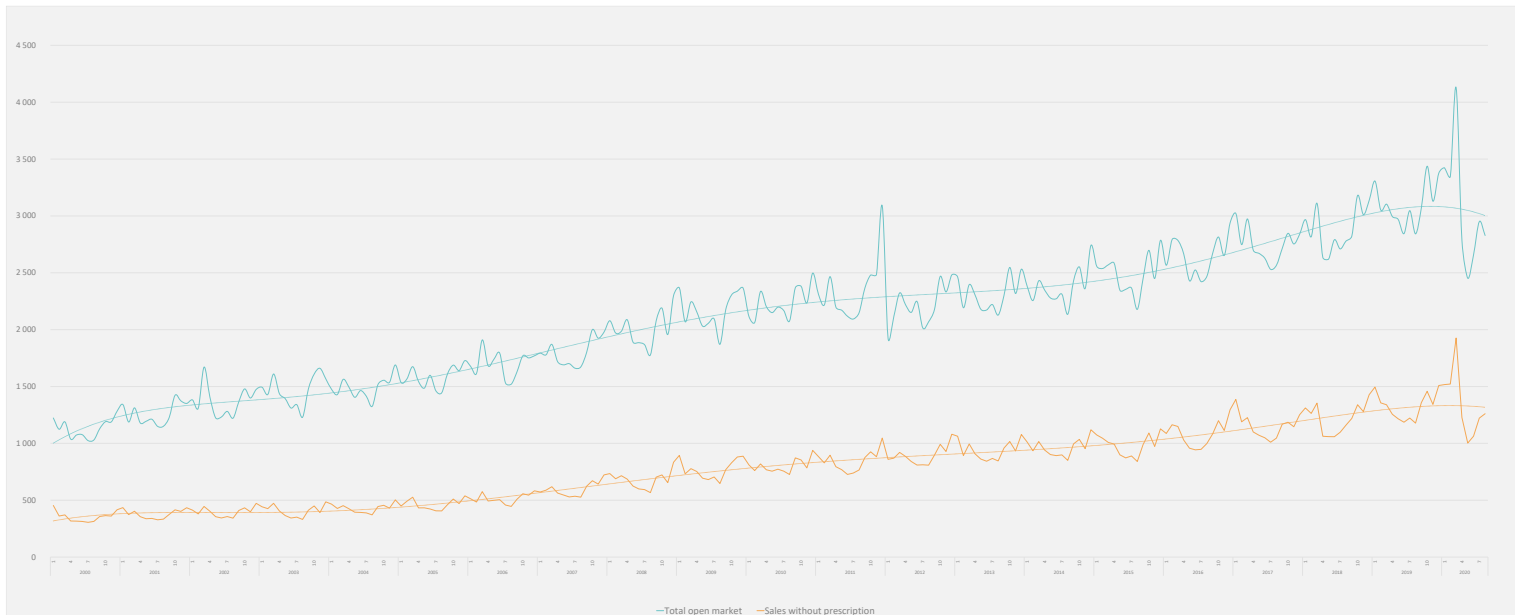
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 10 000 000 zł.



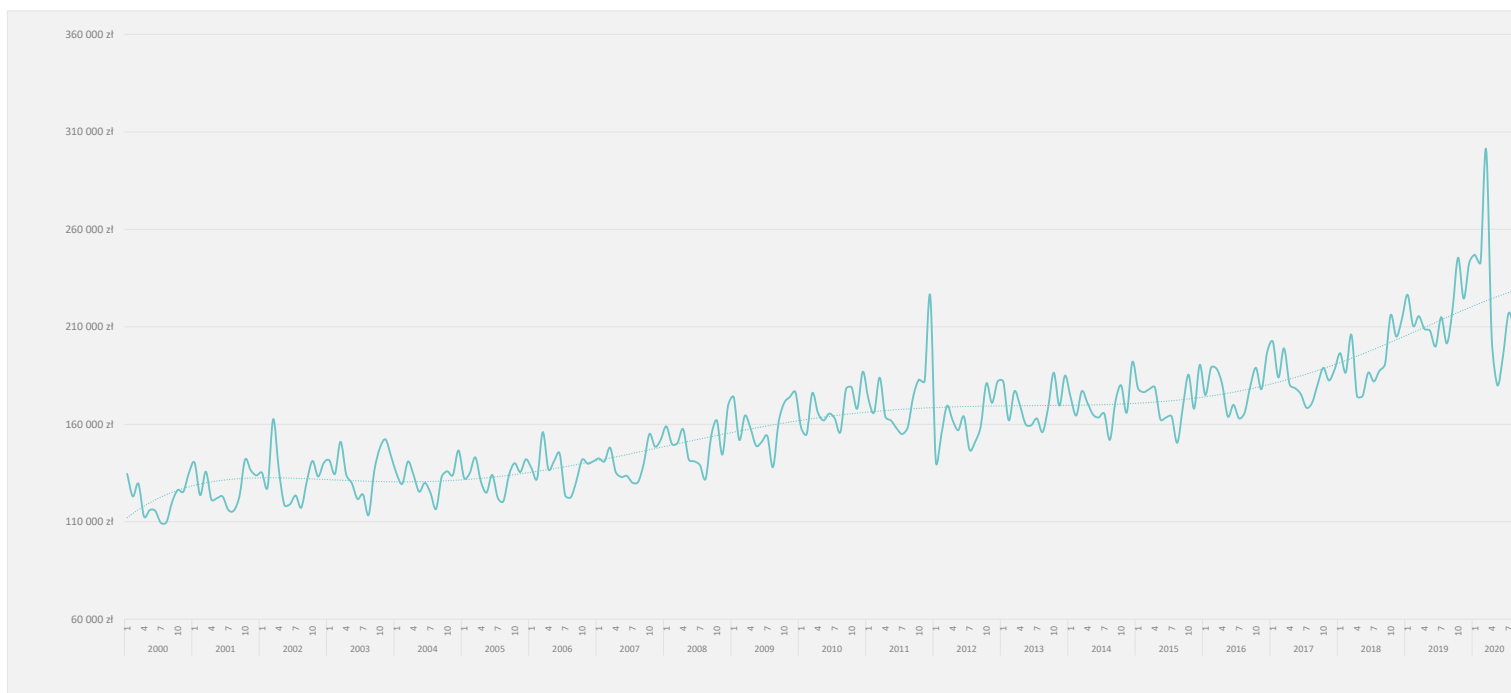
# PEX PharmaSequence monthly report - August 2020

## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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## PEX PharmaSequence monthly report - August 2020

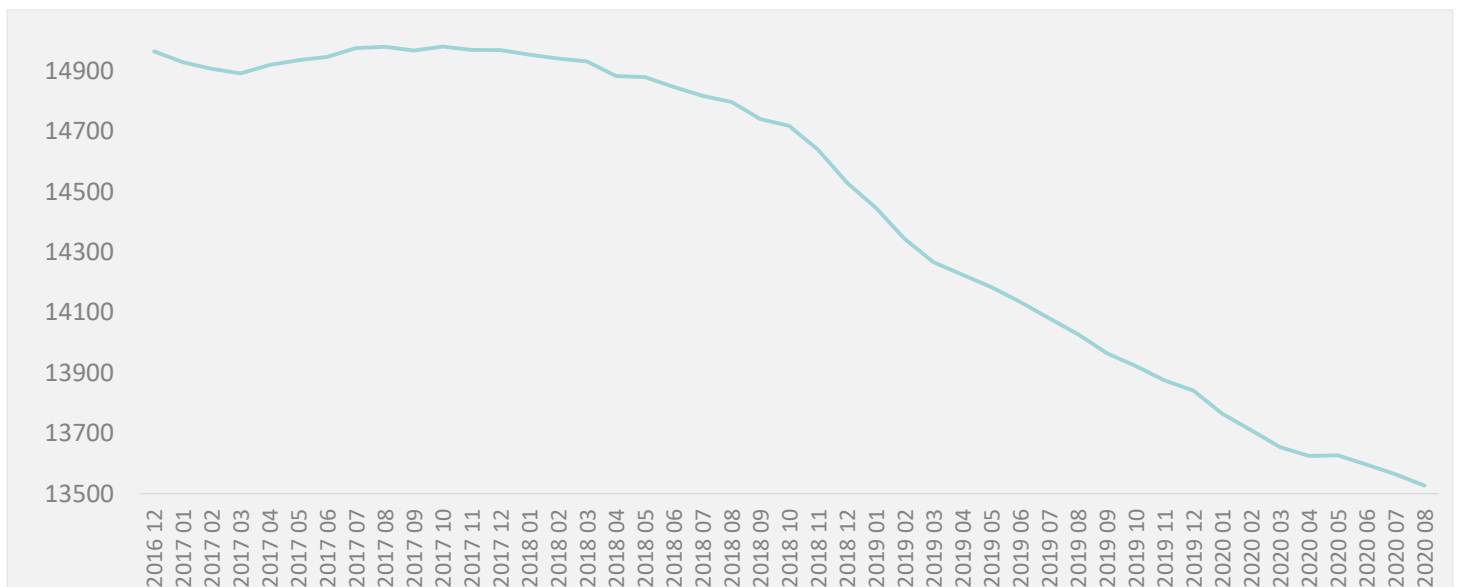
### average pharmacy

	August'20	YTD'2020	July'20	Change		August'19	Change		YTD'2019	Change	
				Value	%		Value	%		Value	%
<b>Total turnover (thousand PLN)</b>											
Total open market <sup>1</sup>	209	1 796	217	-8.5	-3.9%	202	7.0	3.5%	1 686	109.5	6.5%
Rx reimbursed <sup>2</sup>	66	596	74	-8.3	-11.1%	70	-3.9	-5.6%	581	15.3	2.6%
Rx nonreimbursed <sup>3</sup>	48	400	51	-3.0	-5.9%	46	1.4	3.1%	377	23.3	6.2%
Non Rx products <sup>4</sup>	93	785	90	3.1	3.4%	84	9.4	11.3%	715	69.8	9.8%
<b>Average price<sup>5</sup> per pack (PLN)</b>											
Total <sup>1</sup>	22.7	22.4	22.8	-0.11	-0.5%	21.7	1.0	4.6%	21.4	1.0	4.6%
For reimbursed Rx products <sup>2</sup>	29.0	28.9	29.1	-0.1	-0.4%	28.2	0.9	3.1%	28.2	0.8	2.7%
For nonreimbursed products <sup>3</sup>	29.1	28.1	28.7	0.3	1.2%	26.9	2.1	7.9%	26.2	1.9	7.2%
For Non Rx products <sup>4</sup>	17.4	17.1	17.3	0.1	0.7%	16.5	0.9	5.2%	16.3	0.8	4.8%
<b>Average mark-up*</b>											
Total <sup>1</sup>	25.3%	24.71%	24.4%	0.9%	3.7%	24.8%	0.4%	1.7%	24.6%	0.1%	0.4%
For reimbursed Rx products <sup>2</sup>	19%	18.9%	18.9%	0.0%	-0.2%	19.2%	-0.3%	-1.7%	19.0%	-0.1%	-0.4%
For nonreimbursed Rx products <sup>3</sup>	22%	21.2%	21.0%	0.5%	2.6%	20.8%	0.7%	3.5%	20.8%	0.4%	2.0%
For Non Rx products <sup>4</sup>	30%	29.0%	28.5%	1.4%	4.9%	29.8%	0.0%	0.1%	29.3%	-0.3%	-1.1%
<b>Number of patients</b>											
Total <sup>1</sup>	3 450	29 060	3 580	-130	-3.6%	3 650	-200	-5.5%	30 280	-1220	-4.0%
For reimbursed Rx products <sup>2</sup>	690	6 430	830	-140	-16.9%	710	-20	-2.8%	6 040	390	6.5%
For nonreimbursed Rx products <sup>3</sup>	680	5 910	730	-50	-6.8%	750	-70	-9.3%	6 180	-270	-4.4%
For Non Rx products <sup>4</sup>	2 850	23 790	2 870	-20	-0.7%	3 000	-150	-5.0%	25 100	-1310	-5.2%
<b>Number of pharmacies - summary<sup>#</sup></b>											
	13 527	13 634	13 564	-37	-0.3%	14 028	-501	-3.6%	14 214	-580	-4.1%

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

# Number of pharmacies based on PEX's analysis.

### - Pharmacies on the open market -



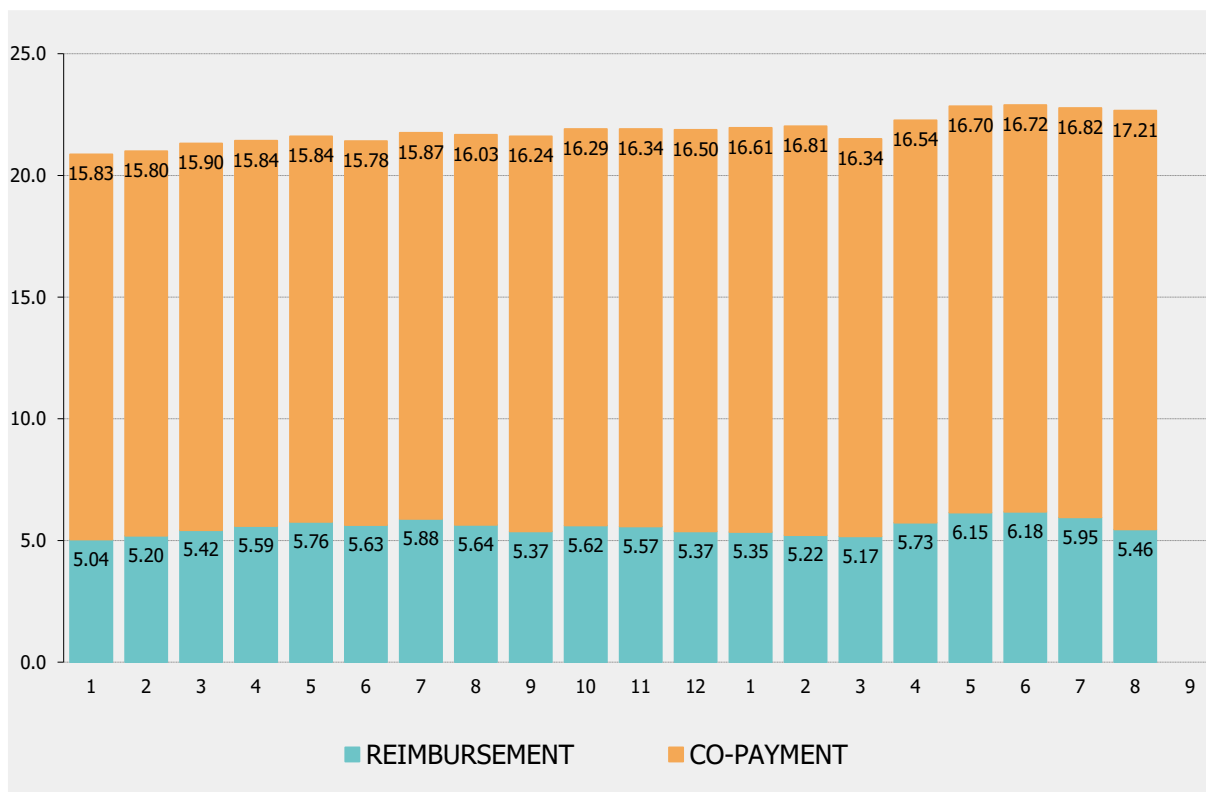
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### Price

- 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.

## PEX PharmaSequence monthly report - August 2020

### PEX PharmaSequence commentary

**The pharmacy market in August 2020** saw sales go close to 2 828.1m PLN. Value of sales compared to August 2019 fell by 14.3m PLN (-0.5%). Compared to July of 2020, sales fell by approximately 122.2m PLN (-4.1%).

**Compared to the same period of 2019** the value of tracked segments grew for one monitored segments. Sales based on reimbursed prescriptions fell by 91.4m PLN (-9.2%), sales based on non-reimbursed prescriptions fell by 5.6m PLN (-0.9%), the non-prescription segment grew by 82.6m PLN (+7%).

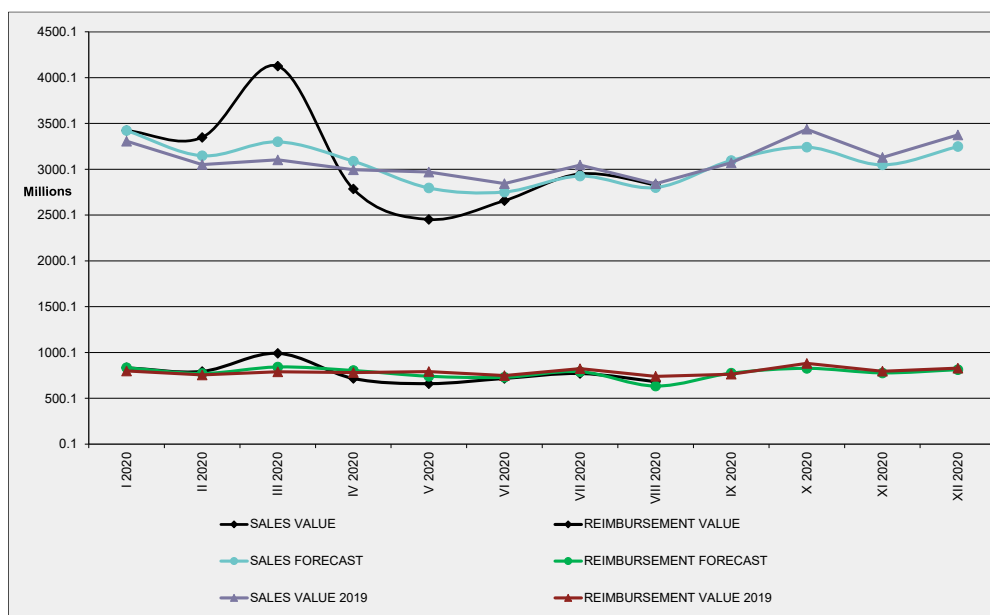
**Compared to the previous month**, the value of tracked segments grew for one monitored segments. Value of reimbursed prescriptions fell by 115m PLN (-11.4%), value of non-reimbursed RX drugs fell by 42.5m PLN (-6.2%) and value of products sold without a prescriptions grew by 38.6m PLN (+3.2%).

**The average retail drug price in August 2020** was 22.7 PLN and was 0.5% lower than the average price in the previous month, and 4.6% higher than the average price in August 2019. The average retail price of reimbursed prescription was 29PLN (+3.1% vs August 2019), 29.1PLN for non-reimbursed prescriptions (+7.9% vs August 2019) and 17.4PLN for products sold without a prescription (+5.2% vs August 2019).

**Average pharmacy margin** for all drugs in August 2020 was 25.3% and was higher by 1.7% than margin in the same period of 2019. Compared to July 2020, the average pharmacy margin was higher by 3.7%.

**Drug reimbursement by the National Health Fund** in August was in the amount 680m PLN, 7.9% less than in the same period of 2019. The level of patient copayment for reimbursed drugs in August was 24.1%, fell by 2p.p. compared to previous month.

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

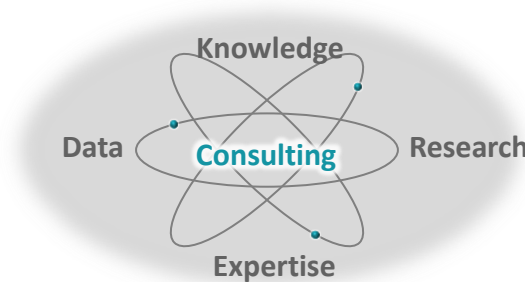


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### About us

**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 **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!

A grey rounded rectangular box containing contact information. At the top left is a white icon of a computer monitor with a bar chart. To its right is the text "www.pexps.pl more info". Below this is a white icon of a person's head and shoulders with three question marks above it. To its right is the text "Ask us a question:", "solutions\_by\_pex@pexps.pl", and "22 886 47 15".

Published on the 21st of September 2020, prepared by Marta Mazurek, Analyst based on PEX PharmaSequence data.

