# PEX PharmaSequence monthly report - November 2020
## Total open market (sell-out report)

| | November 2020 | Change in comparison to | | | Cumulative YTD | | Forecast | | |
|---|---|---|---|---|---|---|---|---|---|
| | | October 2020 | January 2020 | November 2019 | 2020 | Change vs 2019 | 2020 | Change vs 2019 | Change vs 2018 |
| **Total turnover (PLN million)** | | | | | | | | | |
| Total open market [1] | **3 155** | -12.3% | -7.8% | 0.8% | 34 529 | 2.2% | 37 701 | 1.4% | 9.0% |
| Rx reimbursed [2] | **1 015** | -10.6% | -8.4% | -3.9% | 11 346 | -1.8% | 12 399 | -2.1% | 1.8% |
| Rx nonreimbursed [3] | **717** | -9.8% | -6.7% | 1.5% | 7 718 | 2.0% | 8 396 | 1.1% | 11.8% |
| Non Rx products [4] | **1 397** | -14.7% | -7.9% | 4.0% | 15 190 | 5.4% | 16 609 | 4.3% | 13.5% |
| **Reimbursement** | | | | | | | | | |
| Reimbursement value (PLN million) | **763** | -10.5% | -8.5% | -4.2% | 8 563 | -1.2% | 9 356 | -1.5% | 4.8% |
| Reimbursement share In total turnover | **24.2%** | 2.0% | -0.7% | -4.9% | 24.8% | -3.3% | 24.8% | -2.9% | -3.9% |
| Reimbursement share In reimbursed sales | **73.9%** | 0.1% | 0.1% | -0.4% | 74.3% | 0.6% | 74.3% | 0.5% | 2.5% |
| **Average price per pack (PLN)** | | | | | | | | | |
| Total [1] | **22.9** | 0.9% | 4.4% | 4.6% | 21.9 | 3.3% | 21.9 | 3.1% | 5.1% |
| For reimbursed Rx products [2] | **29.2** | 0.2% | 2.3% | 2.2% | 29.2 | 2.2% | 29.5 | 2.5% | 5.4% |
| For nonreimbursed Rx products [3] | **29.5** | 0.0% | 8.2% | 9.3% | 29.5 | 9.3% | 29.2 | 8.6% | 15.1% |
| For Non Rx products [4] | **17.8** | 0.4% | 3.6% | 5.1% | 17.8 | 5.1% | 17.7 | 3.8% | 12.3% |
| **Average mark-up** | | | | | | | | | |
| Total [1] | **25.0%** | -0.2% | 0.9% | 1.7% | 24.9% | 0.8% | 24.8% | 0.5% | -0.8% |
| For reimbursed Rx products [2] | **18.7%** | 0.2% | -0.5% | -1.4% | 19.0% | -1.3% | 19.0% | -1.3% | 1.5% |
| For nonreimbursed Rx products [3] | **21.8%** | 1.7% | 4.9% | 2.0% | 21.4% | 1.5% | 21.3% | 0.5% | -7.0% |
| For Non Rx products [4] | **29.2%** | -0.9% | 0.4% | 1.7% | 29.2% | 0.5% | 29.1% | 0.0% | -1.5% |
| **Average pharmacy** | | | | | | | | | |
| Number of patients in pharmacies | **3 500** | -14.8% | -19.7% | -10.3% | 40 520 | -4.6% | 44 585 | -4.5% | 1.8% |
| Total turnover (PLN thousand) [1] | **234** | -12.0% | -5.3% | 4.2% | 2 533 | 6.7% | 2 769 | 5.8% | 19.3% |

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

| 2020 | Pharmacy market total [1] | | Rx reimbursed prescriptions [2] | | Rx nonreimbursed prescriptions [3] | | Non Rx products [4] | |
|---|---|---|---|---|---|---|---|---|
| | 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** | 27 777 | 2.0% | 9 196 | -1.4% | 6 205 | 2.1% | 12 154 | 4.7% |
| **October** | 31 373 | 2.3% | 10 331 | -1.6% | 7 001 | 2.0% | 13 792 | 5.6% |
| **November** | 34 529 | 2.2% | 11 346 | -1.8% | 7 718 | 2.0% | 15 190 | 5.4% |
| **December** | | | | | | | | |

# PEX PharmaSequence monthly report - November 2020

## Trends

### - Total monthly pharmacy sales in PLN million -



—Total open market    —Sales without prescription
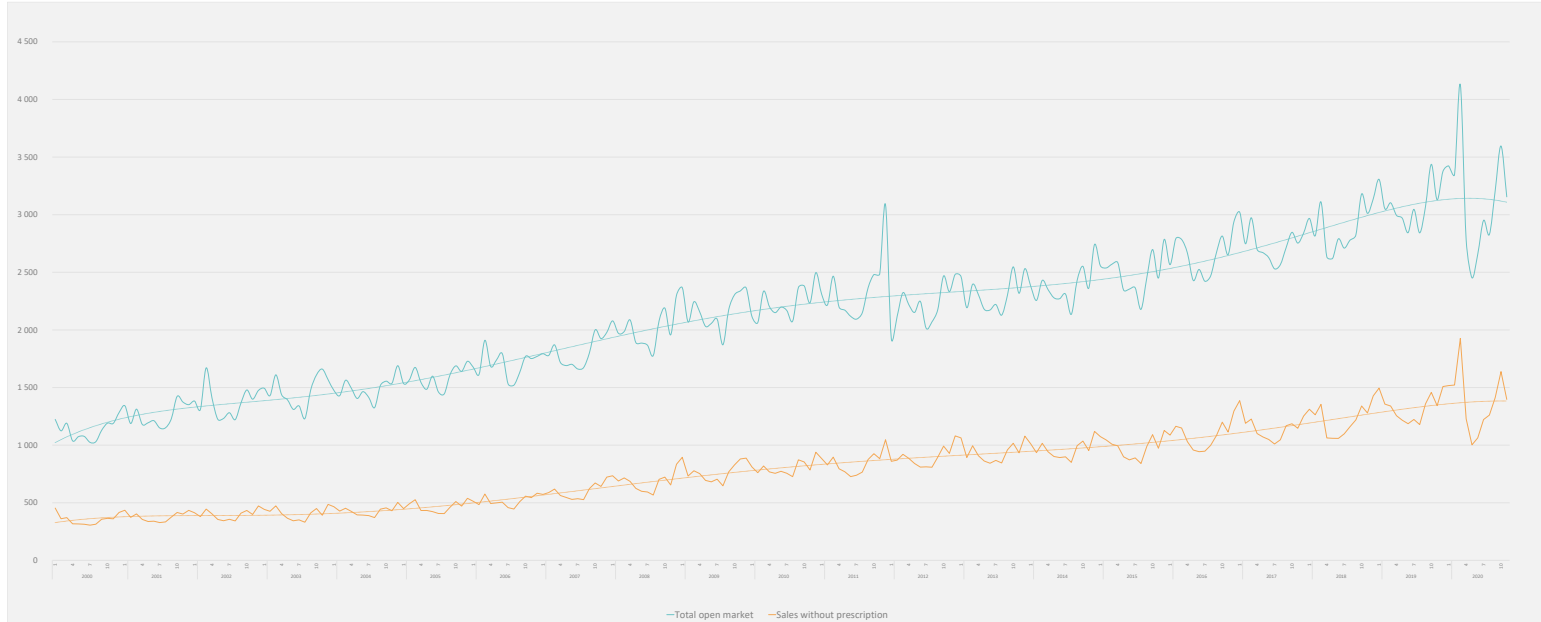
### - Total monthly sales in an average pharmacy in PLN -
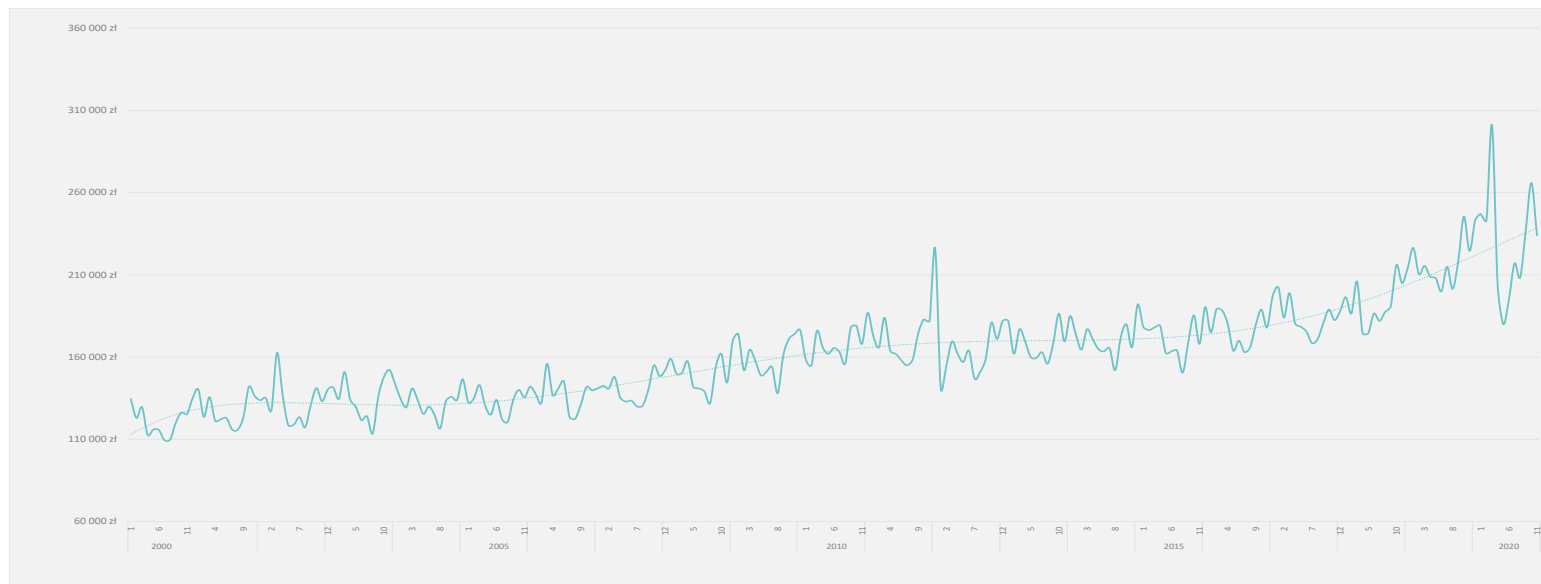
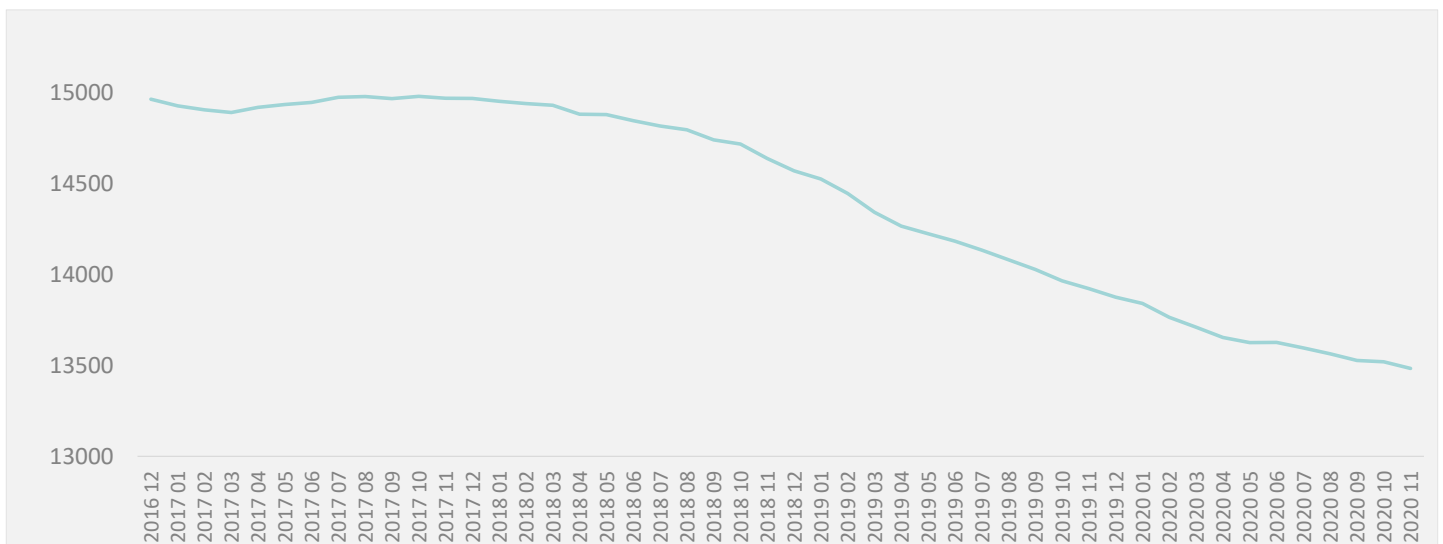# PEX PharmaSequence monthly report - November 2020
## average pharmacy

| | November'20 | YTD'2020 | October'20 | Change | | November'19 | Change | | YTD'2019 | Change | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Value | % | | Value | % | | Value | % |
| **Total turnover (thousand PLN)** | | | | | | | | | | | |
| Total open market [1] | **234** | 2 533 | 266 | -32.0 | -12.0% | 225 | 9.5 | 4.2% | 2 375 | 158.0 | 6.7% |
| Rx reimbursed [2] | **75** | 832 | 84 | -8.7 | -10.4% | 76 | -0.5 | -0.6% | 812 | 20.1 | 2.5% |
| Rx nonreimbursed [3] | **53** | 566 | 59 | -5.6 | -9.6% | 51 | 2.5 | 4.9% | 532 | 34.4 | 6.5% |
| Non Rx products [4] | **104** | 1 114 | 121 | -17.6 | -14.5% | 96 | 7.3 | 7.5% | 1 012 | 101.8 | 10.1% |
| **Average price[5] per pack (PLN)** | | | | | | | | | | | |
| Total [1] | **22.9** | 22.5 | 22.7 | 0.20 | 0.9% | 21.9 | 1.0 | 4.6% | 21.5 | 1.0 | 4.6% |
| For reimbursed Rx products [2] | **29.2** | 29.0 | 29.1 | 0.1 | 0.2% | 28.6 | 0.6 | 2.2% | 28.3 | 0.7 | 2.5% |
| For nonreimbursed products [3] | **29.5** | 28.5 | 29.5 | 0.0 | 0.0% | 27.0 | 2.5 | 9.3% | 26.4 | 2.1 | 7.8% |
| For Non Rx products [4] | **17.8** | 17.3 | 17.7 | 0.1 | 0.4% | 16.9 | 0.9 | 5.1% | 16.5 | 0.8 | 5.0% |
| **Average mark-up*** | | | | | | | | | | | |
| Total [1] | **25.0%** | 24.84% | 25.0% | -0.1% | -0.2% | 24.5% | 0.4% | 1.7% | 24.7% | 0.2% | 0.6% |
| For reimbursed Rx products [2] | **19%** | 18.9% | 18.6% | 0.0% | 0.2% | 18.9% | -0.3% | -1.4% | 19.2% | -0.3% | -1.5% |
| For nonreimbursed Rx products [3] | **22%** | 21.4% | 21.5% | 0.4% | 1.7% | 21.4% | 0.4% | 2.0% | 21.1% | 0.3% | 1.4% |
| For Non Rx products [4] | **29%** | 29.1% | 29.5% | -0.3% | -0.9% | 28.7% | 0.5% | 1.7% | 29.1% | 0.1% | 0.2% |
| **Number of patients** | | | | | | | | | | | |
| Total [1] | **3 500** | 40 520 | 4 110 | -610 | -14.8% | 3 900 | -400 | -10.3% | 42 480 | -1960 | -4.6% |
| For reimbursed Rx products [2] | **820** | 9 040 | 930 | -110 | -11.8% | 800 | 20 | 2.5% | 8 490 | 550 | 6.5% |
| For nonreimbursed Rx products [3] | **750** | 8 260 | 830 | -80 | -9.6% | 830 | -80 | -9.6% | 8 720 | -460 | -5.3% |
| For Non Rx products [4] | **2 850** | 33 130 | 3 370 | -520 | -15.4% | 3 210 | -360 | -11.2% | 35 160 | -2030 | -5.8% |
| **Number of pharmacies - summary#** | | | | | | | | | | | |
| | **13 483** | 13 628 | 13 520 | -37 | -0.3% | 13 875 | -392 | -2.8% | 14 167 | -538 | -3.8% |

*Values in „Change – value" for average mark-up in percentage points
# Number of pharmacies based on PEX's analysis.
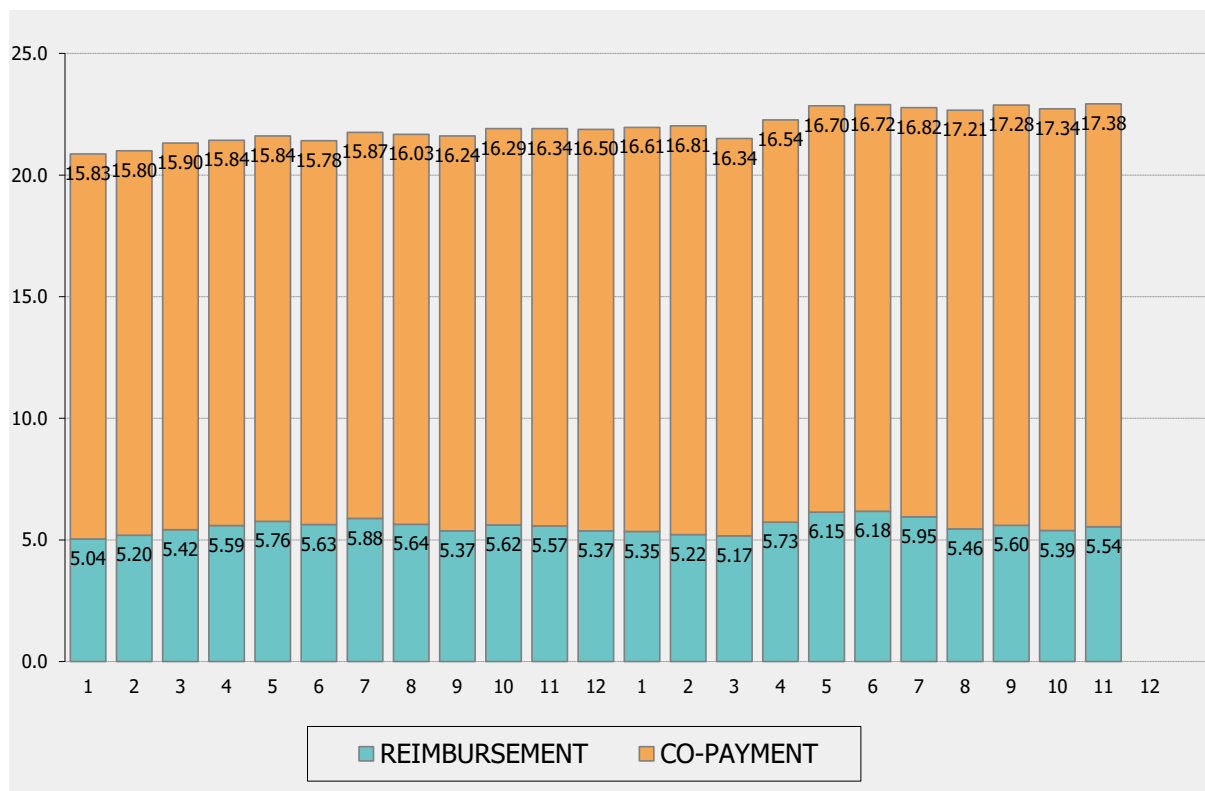
## - Pharmacies on the open market -

# PEX PharmaSequence monthly report - November 2020
## 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 monthly report - November 2020
## PEX PharmaSequence commentary

**The pharmacy market in November 2020** saw sales go close to 3 155m PLN. Value of sales compared to November 2019 grew by 25.9m PLN (+0.8%). Compared to October of 2020, sales fell by approximately 441.3m PLN (-12.3%).

**Compared to the same period of 2019** the value of tracked segments grew for two monitored segments. Sales based on reimbursed prescriptions fell by 40.8m PLN (-3.9%), sales based on non-reimbursed prescriptions grew by 10.7m PLN (+1.5%), the non-prescription segment grew by 54.1m PLN (+4%).

**Compared to the previous month,** the value of tracked segments fell for all monitored segments. Value of reimbursed prescriptions fell by 120.4m PLN (-10.6%), value of non-reimbursed RX drugs fell by 77.9m PLN (-9.8%) and value of products sold without a prescriptions fell by 241.3m PLN (-14.7%).

**The average retail drug price in November 2020** was 22.9 PLN and was 0.9% higher than the average price in the previous month, and 4.6% higher than the average price in November 2019. The average retail price of reimbursed prescription was 29.2PLN (+2.2% vs November 2019), 29.5PLN for non-reimbursed prescriptions (+9.3% vs November 2019) and 17.8PLN for products sold without a prescription (+5.1% vs November 2019).

**Average pharmacy margin for all drugs in November 2020** was 25% and was higher by 1.7% than margin in the same period of 2019. Compared to October 2020, the average pharmacy margin was lower by 0.2%.

**Drug reimbursement by the National Health Fund** in November was in the amount 762m PLN, 4.2% less than in the same period of 2019. The level of patient copayment for reimbursed drugs in November was 24.2%, grew by 0.5p.p. compared to previous month.

- Monthly turnover value forecast (PLN million, retail gross prices) -
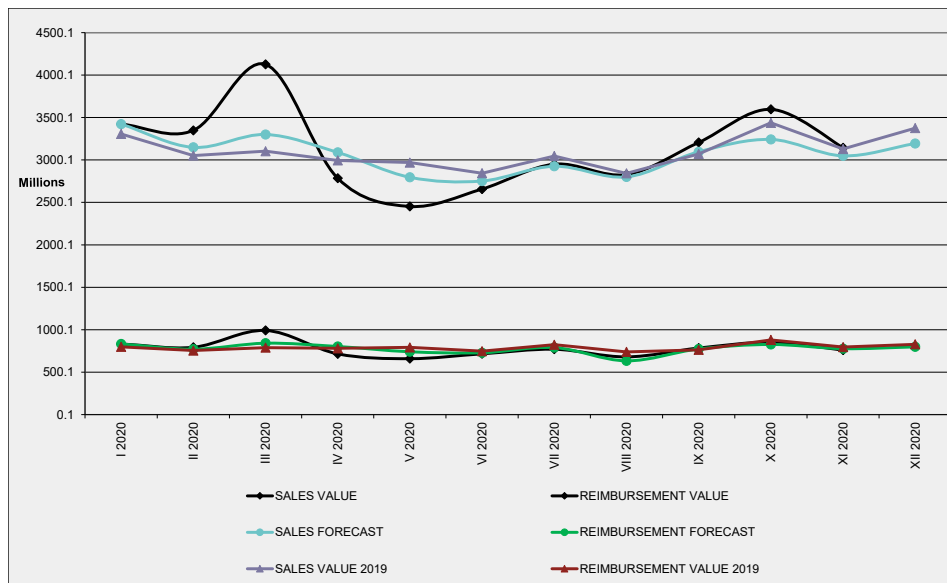
# PEX PharmaSequence monthly report - November 2020

## 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.

Knowledge

Data          Consulting          Research

Expertise
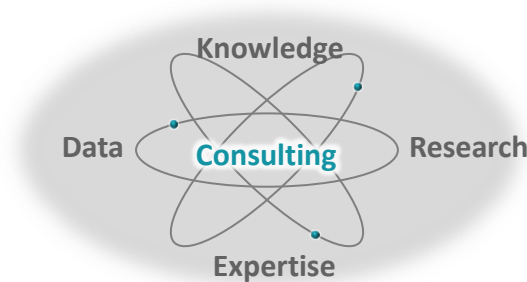
It is not without significance that our team, comprising **60+ people,** has the benefit of experience gained in service companies specializing in the pharma sector, as well as industry experience acquired in local and global pharmaceutical companies.

**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** more info

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

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