



PEX PharmaSequence monthly report - June 2021

Total open market (sell-out report)

	June 2021	Change in comparison to			Cumulative YTD		Forecast		
		May 2021	January 2021	June 2020	2021	Change vs 2020	2021	Change vs 2020	Change vs 2019
Total turnover (PLN million)									
Total open market ¹	3 250	3.9%	13.4%	22.3%	19 016	1.2%	39 166	3.9%	5.4%
Rx reimbursed ²	1 057	3.4%	23.9%	12.2%	6 101	-2.3%	12 961	4.5%	2.4%
Rx nonreimbursed ³	823	3.8%	25.3%	30.8%	4 796	15.8%	8 782	4.0%	5.7%
Non Rx products ⁴	1 344	4.6%	1.1%	26.4%	7 954	-3.7%	17 080	3.1%	7.3%
Reimbursement									
Reimbursement value (PLN million)	792	3.1%	22.4%	10.5%	4 600	-2.4%	9 534	1.9%	0.4%
Reimbursement share In total turnover	24.4%	-0.8%	7.9%	-9.7%	24.2%	-3.5%	24.3%	-1.9%	-4.7%
Reimbursement share In reimbursed sales	73.8%	0.0%	-0.6%	-1.5%	74.0%	-0.4%	72.3%	-2.7%	-2.2%
Average price per pack (PLN)									
Total ¹	23.9	-0.5%	1.4%	4.2%	22.3	3.5%	22.9	4.0%	7.6%
For reimbursed Rx products ²	29.7	0.2%	1.9%	2.4%	29.7	2.4%	30.4	2.5%	5.7%
For nonreimbursed Rx products ³	30.5	0.2%	2.5%	6.7%	30.5	6.7%	29.8	0.9%	10.8%
For Non Rx products ⁴	18.4	-0.9%	0.3%	7.0%	18.4	7.0%	18.4	2.2%	7.6%
Average mark-up									
Total ¹	25.0%	2.5%	3.2%	2.0%	24.6%	-0.6%	24.3%	-2.2%	-1.5%
For reimbursed Rx products ²	18.7%	2.1%	2.4%	-1.0%	18.6%	-2.4%	18.8%	-0.6%	-2.2%
For nonreimbursed Rx products ³	22.6%	2.3%	7.2%	8.2%	22.1%	4.3%	20.7%	-3.1%	-2.2%
For Non Rx products ⁴	29.4%	4.0%	7.5%	0.1%	28.6%	-1.6%	27.9%	-4.1%	-4.1%
Average pharmacy									
Number of patients in pharmacies	3 830	7.9%	18.2%	19.3%	21 470	-2.5%	44 076	-0.1%	-5.6%
Total turnover (PLN thousand) ¹	245	4.0%	14.3%	25.4%	1 426	4.1%	2 948	6.4%	12.6%

- Total pharmacy turnover cumulative in PLN million -

2021	Pharmacy market total ¹		Rx reimbursed prescriptions ²		Rx nonreimbursed prescriptions ³		Non Rx products ⁴	
	Total	Change vs 2020	Total	Change vs 2020	Total	Change vs 2020	Total	Change vs 2020
January	2 867	-16.3%	853	-23.0%	657	-14.5%	1 329	-12.4%
February	5 820	-14.1%	1 823	-15.9%	1 508	-0.3%	2 437	-19.8%
March	9 351	-14.2%	2 950	-15.6%	2 366	0.2%	3 954	-20.4%
April	12 638	-7.6%	4 023	-9.3%	3 180	7.7%	5 326	-14.0%
May	15 766	-2.3%	5 044	-4.9%	3 973	13.1%	6 610	-8.1%
June	19 016	1.2%	6 101	-2.3%	4 796	15.8%	7 954	-3.7%
July								
August								
September								
October								
November								
December								

Retail sales in PLN

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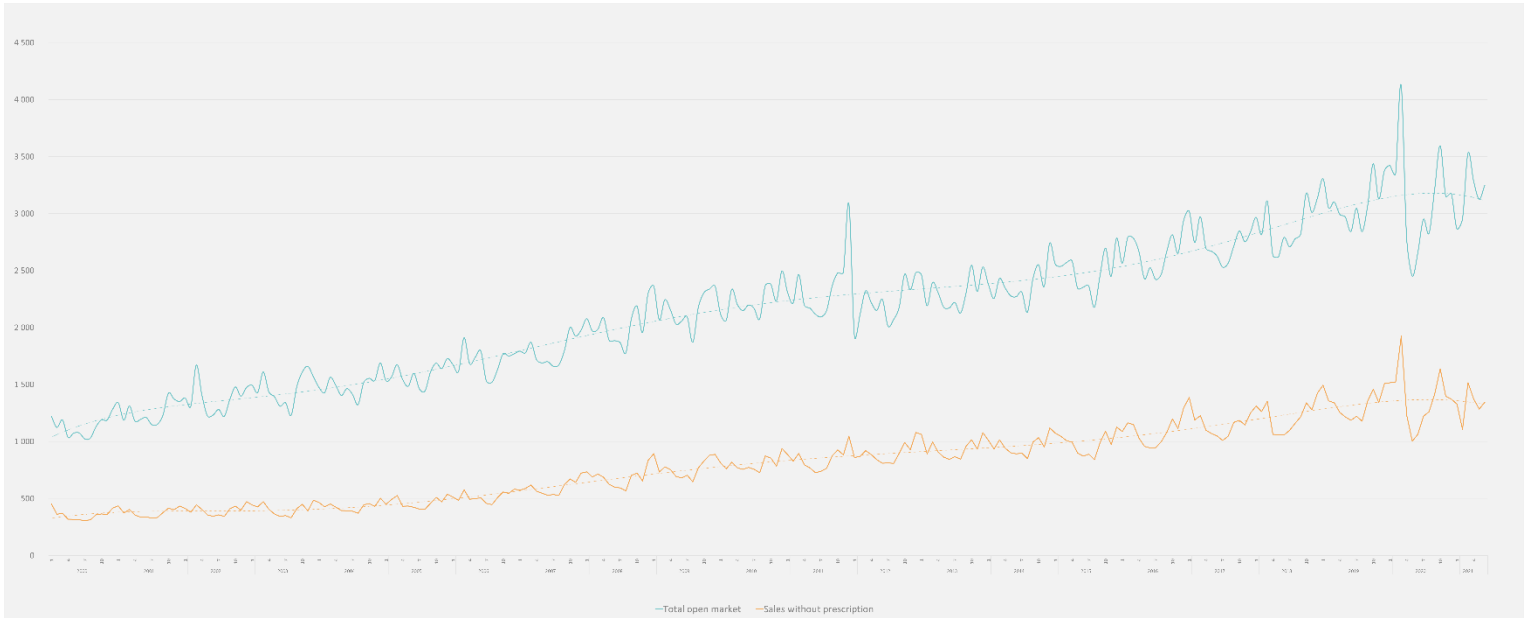
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 12 200 000 zł.



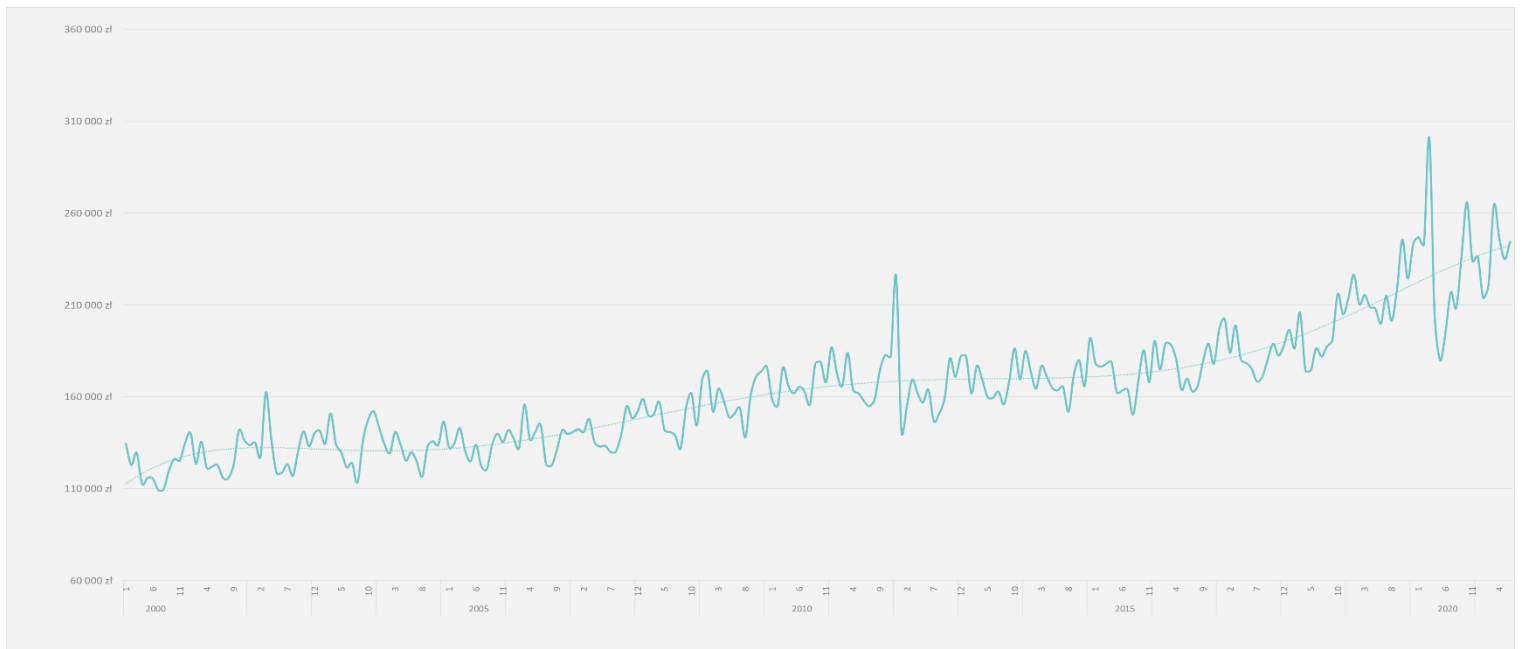
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Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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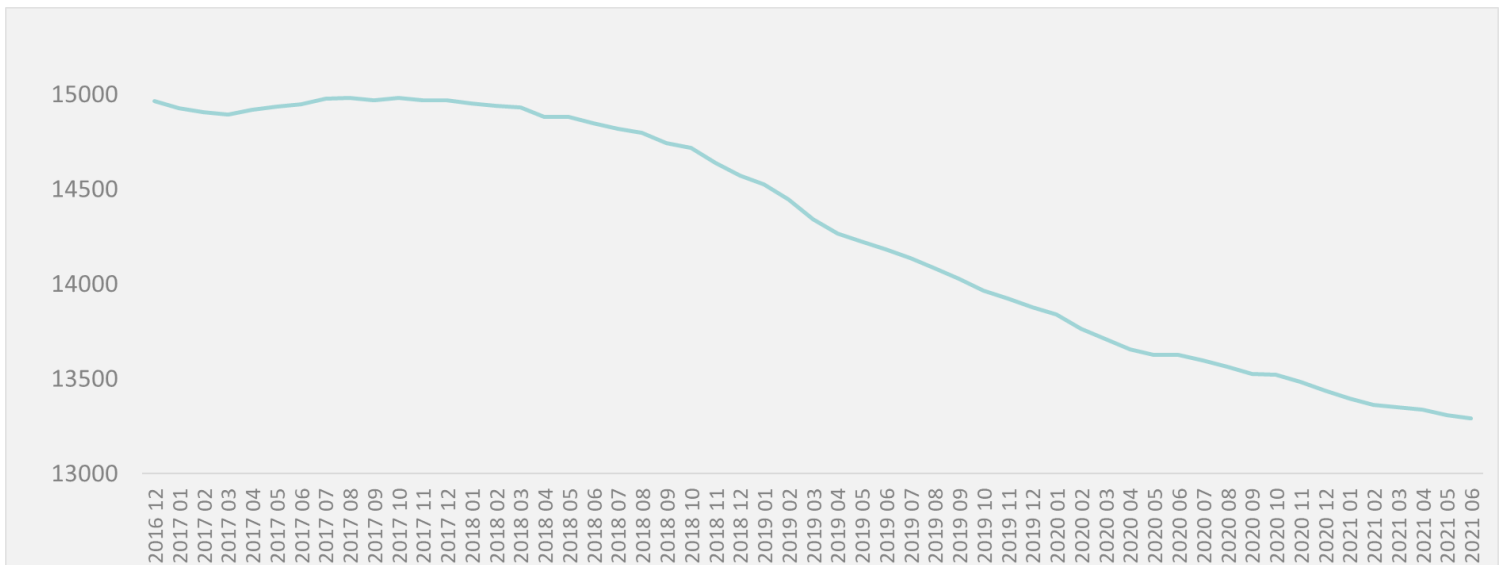
PEX PharmaSequence monthly report - June 2021 average pharmacy

	June'21	YTD'2021	May'20	Change		June'20	Change		YTD'2020	Change	
				Value	%		Value	%		Value	%
Total turnover (thousand PLN)											
Total open market ¹	245	1 426	235	9.5	4.0%	195	49.5	25.4%	1 370	55.5	4.1%
Rx reimbursed ²	80	457	77	2.7	3.6%	69	10.4	15.0%	455	2.1	0.5%
Rx nonreimbursed ³	62	360	60	2.4	4.0%	46	15.7	34.1%	302	57.6	19.1%
Non Rx products ⁴	101	596	97	4.6	4.7%	78	23.1	29.6%	602	-5.7	-1.0%
Average price ⁵ per pack (PLN)											
Total ¹	23.9	23.8	24.0	-0.11	-0.5%	22.9	1.0	4.2%	22.2	1.5	6.9%
For reimbursed Rx products ²	29.7	29.6	29.7	0.1	0.2%	29.0	0.7	2.4%	28.9	0.7	2.5%
For nonreimbursed products ³	30.5	30.2	30.4	0.1	0.2%	28.6	1.9	6.7%	27.8	2.4	8.7%
For Non Rx products ⁴	18.4	18.5	18.6	-0.2	-0.9%	17.2	1.2	7.0%	17.1	1.4	8.1%
Average mark-up*											
Total ¹	25.0%	24.61%	24.4%	0.6%	2.5%	24.5%	0.5%	2.0%	24.7%	-0.1%	-0.3%
For reimbursed Rx products ²	19%	18.5%	18.4%	0.4%	2.1%	18.9%	-0.2%	-1.0%	19.0%	-0.4%	-2.2%
For nonreimbursed Rx products ³	23%	22.1%	22.1%	0.5%	2.3%	20.9%	1.7%	8.2%	21.2%	0.9%	4.3%
For Non Rx products ⁴	29%	28.6%	28.2%	1.1%	4.0%	29.4%	0.0%	0.1%	28.9%	-0.3%	-1.0%
Number of patients											
Total ¹	3 830	21 470	3 550	280	7.9%	3 210	620	19.3%	22 030	-560	-2.5%
For reimbursed Rx products ²	920	5 070	860	60	7.0%	680	240	35.3%	4 910	160	3.3%
For nonreimbursed Rx products ³	820	4 710	780	40	5.1%	670	150	22.4%	4 500	210	4.7%
For Non Rx products ⁴	3 060	17 320	2 830	230	8.1%	2 590	470	18.1%	18 070	-750	-4.2%
Number of pharmacies - summary[#]											
	13 293	13 341	13 308	-15	-0.1%	13 627	-319	-2.3%	13 704	-363	-2.6%

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

[#] Number of pharmacies based on PEX's analysis.

- Pharmacies on the open market -



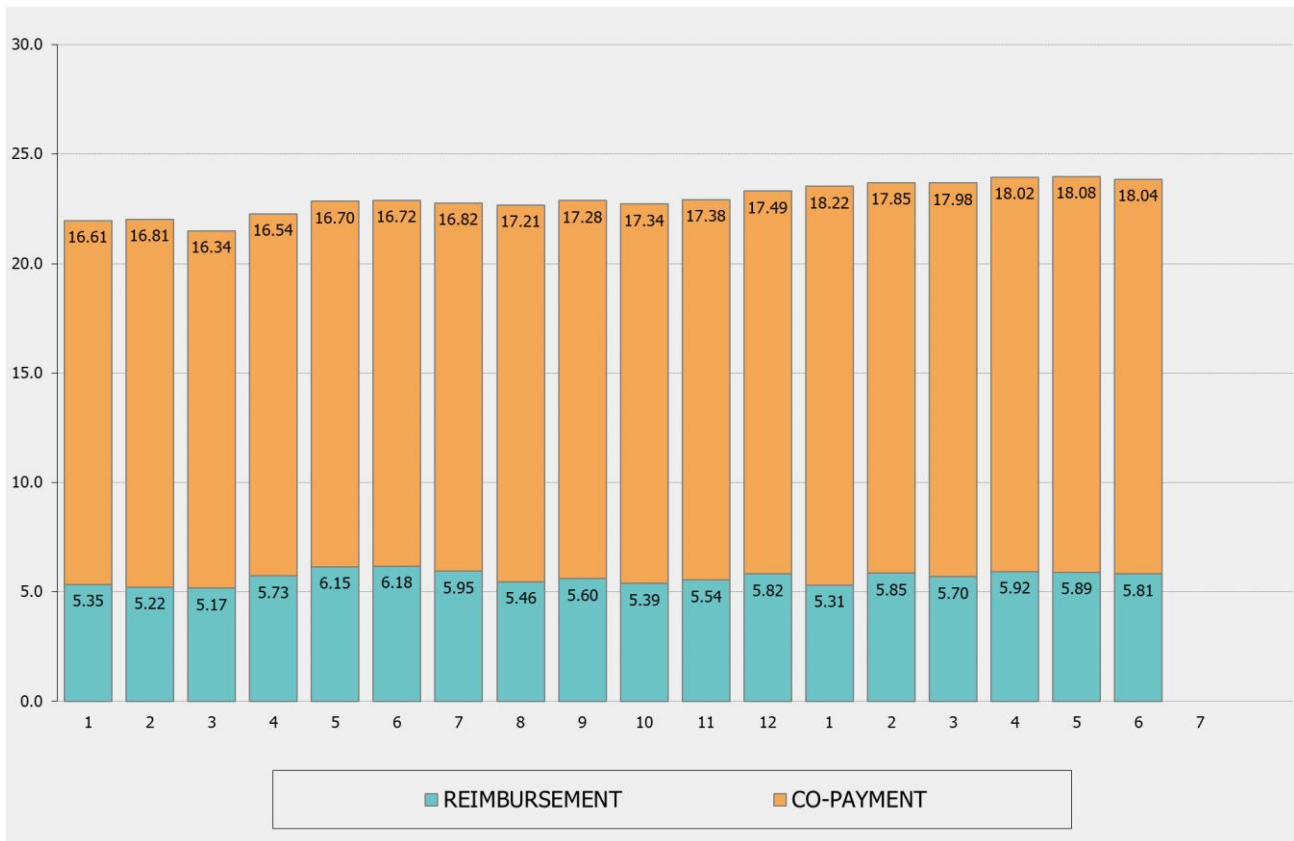
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Price

- Structure of the average retail price⁵ -



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.

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PEX PharmaSequence commentary

The pharmacy market in June 2021 saw sales go close to 3250.1m PLN. Value of sales compared to June 2020 grew by 592.9m PLN (+22.3%). Compared to May of 2021, sales grew by approximately 122.8m PLN (+3.9%).

Compared to the same period of 2020 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 114.7m PLN (+12.2%), sales based on non-reimbursed prescriptions grew by 193.8m PLN (+30.8%), the non-prescription segment grew by 281m PLN (+26.4%).

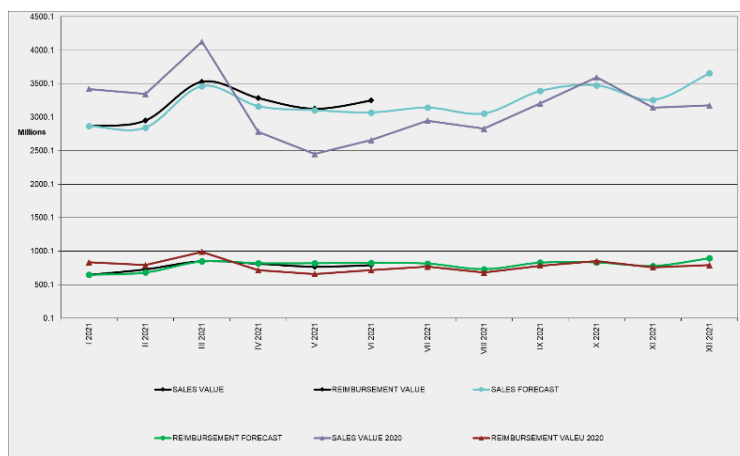
Compared to the previous month, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 35.2m PLN (+3.4%), value of non-reimbursed RX drugs grew by 30.4m PLN (+3.8%) and value of products sold without a prescriptions grew by 59.3m PLN (+4.6%).

The average retail drug price in June 2021 was 23.9 PLN and was 0.5% lower than the average price in the previous month, and 4.2% higher than the average price in June 2020. The average retail price of reimbursed prescription was 29.7PLN (+2.4% vs June 2020), 30.5PLN for non-reimbursed prescriptions (+6.7% vs June 2020) and 18.4PLN for products sold without a prescription (+7% vs June 2020).

Average pharmacy margin for all drugs in June 2021 was 25% and was higher by 2% than margin in the same period of 2020. Compared to May 2021, the average pharmacy margin was higher by 2.5%.

Drug reimbursement by the National Health Fund in June was in the amount 792m PLN, 10.5% more than in the same period of 2020. The level of patient copayment for reimbursed drugs in June was 24.4%, fell by 0.2p.p. compared to previous month.

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

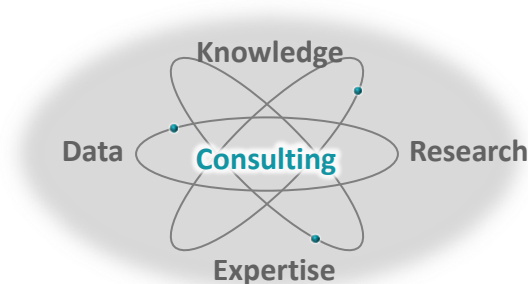


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About us

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!



www.pexps.pl more info



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