



PEX PharmaSequence monthly report - August 2021

Total open market (sell-out report)

	August 2021	Change in comparison to			Cumulative YTD		Forecast		
		July 2021	January 2021	August 2020	2021	Change vs 2020	2021	Change vs 2020	Change vs 2019
Total turnover (PLN million)									
Total open market ¹	3 167	-3.2%	10.5%	12.0%	25 457	3.6%	39 359	4.4%	5.9%
Rx reimbursed ²	995	-6.3%	16.6%	10.8%	8 158	0.0%	12 975	4.6%	2.5%
Rx nonreimbursed ³	799	-4.7%	21.6%	23.5%	6 433	17.4%	8 905	5.4%	7.2%
Non Rx products ⁴	1 347	0.2%	1.4%	6.8%	10 646	-0.9%	17 143	3.5%	7.7%
Reimbursement									
Reimbursement value (PLN million)	750	-6.2%	15.8%	10.1%	6 149	-0.2%	9 522	1.8%	0.3%
Reimbursement share In total turnover	23.7%	-3.1%	4.8%	-1.7%	24.2%	-3.7%	24.2%	-2.5%	-5.3%
Reimbursement share In reimbursed sales	74.1%	0.1%	-0.2%	-0.7%	74.0%	-0.5%	72.1%	-3.0%	-2.4%
Average price per pack (PLN)									
Total ¹	24.0	0.2%	2.1%	5.9%	22.4	3.4%	22.8	3.8%	7.4%
For reimbursed Rx products ²	29.7	-0.4%	1.8%	2.3%	29.7	2.3%	30.2	1.7%	4.8%
For nonreimbursed Rx products ³	31.0	0.7%	4.1%	6.7%	31.0	6.7%	29.6	0.2%	10.1%
For Non Rx products ⁴	18.7	1.2%	1.9%	7.7%	18.7	7.7%	18.3	1.9%	7.3%
Average mark-up									
Total ¹	25.1%	2.6%	3.8%	-0.5%	24.7%	-0.4%	24.5%	-1.5%	-0.9%
For reimbursed Rx products ²	18.5%	2.1%	0.9%	-2.1%	18.5%	-2.6%	18.7%	-1.2%	-2.8%
For nonreimbursed Rx products ³	22.5%	4.3%	7.1%	4.6%	22.1%	4.2%	21.2%	-0.7%	0.3%
For Non Rx products ⁴	29.6%	1.6%	8.2%	-1.1%	28.8%	-1.1%	28.2%	-2.9%	-2.8%
Average pharmacy									
Number of patients in pharmacies	3 780	-2.3%	16.7%	9.6%	29 120	0.2%	44 868	1.7%	-3.9%
Total turnover (PLN thousand) ¹	239	-3.0%	11.7%	14.6%	1 911	6.4%	2 963	7.0%	13.2%

- 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	22 289	2.5%	7 163	-1.3%	5 634	16.6%	9 299	-1.9%
August	25 457	3.6%	8 158	0.0%	6 433	17.4%	10 646	-0.9%
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>

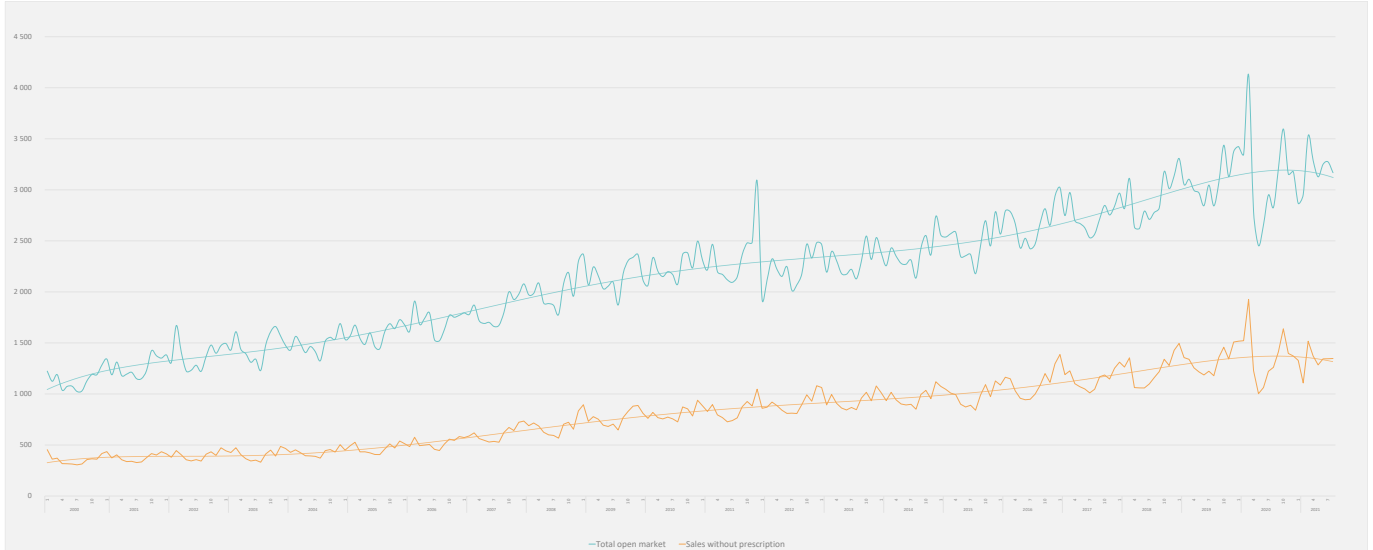
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 12 200 000 zł.



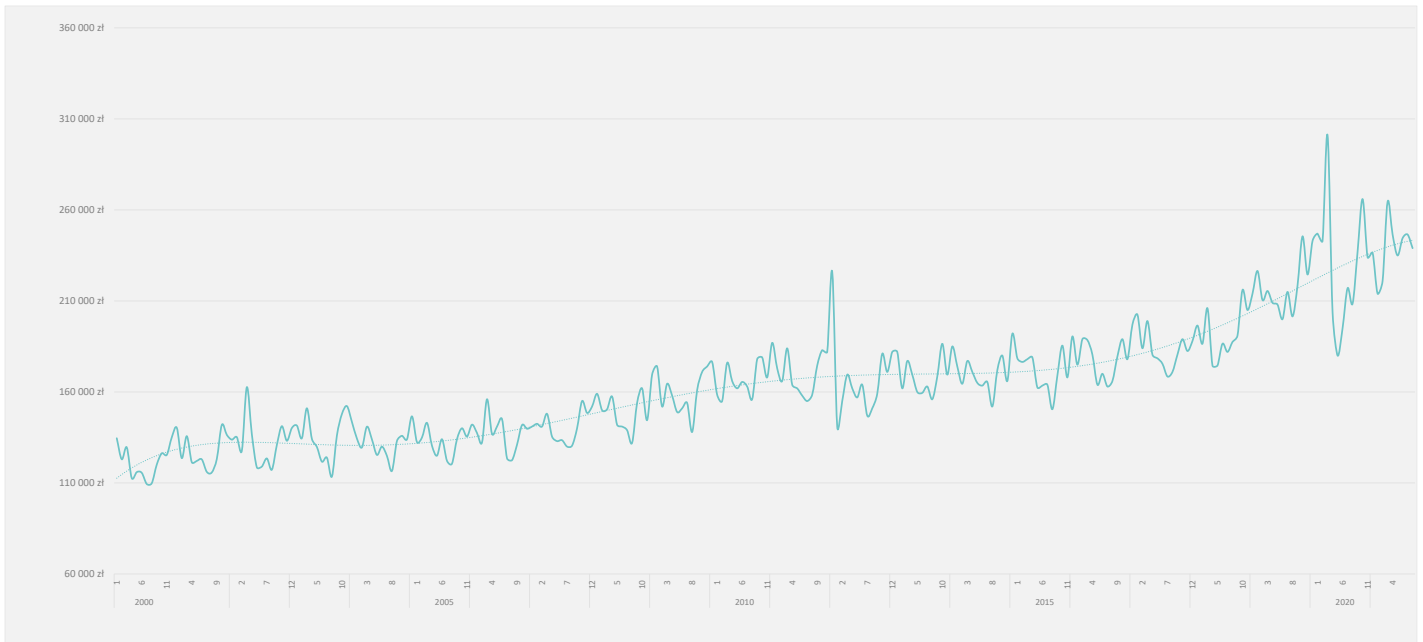
PEX PharmaSequence monthly report - August 2021

Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy 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>

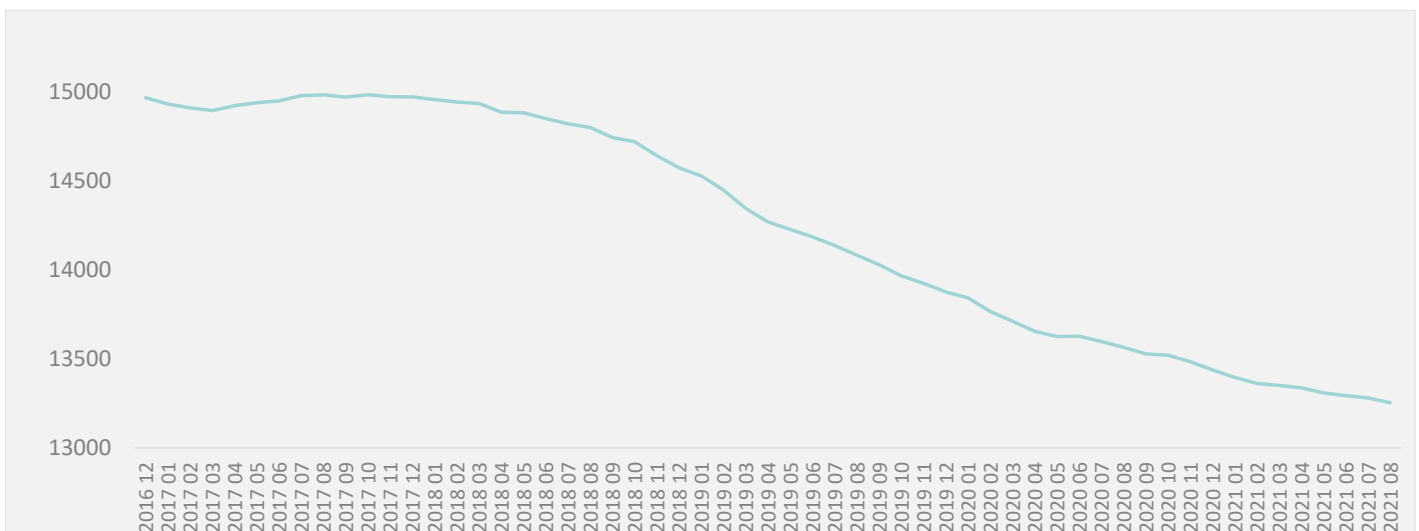
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 10 000 000 zł

PEX PharmaSequence monthly report - August 2021 average pharmacy

	August'21	YTD'2021	July'21	Change		August'20	Change		YTD'2020	Change	
				Value	%		Value	%		Value	%
Total turnover (thousand PLN)											
Total open market ¹	239	1 911	247	-7.5	-3.0%	209	30.5	14.6%	1 796	115.5	6.4%
Rx reimbursed ²	75	612	80	-4.9	-6.1%	66	8.9	13.4%	596	16.5	2.8%
Rx nonreimbursed ³	60	483	63	-2.8	-4.5%	48	12.6	26.4%	400	82.6	20.6%
Non Rx products ⁴	102	799	101	0.4	0.4%	93	8.7	9.4%	785	14.3	1.8%
Average price⁵ per pack (PLN)											
Total ¹	24.0	23.8	24.0	0.04	0.2%	22.7	1.3	5.9%	22.4	1.5	6.6%
For reimbursed Rx products ²	29.7	29.7	29.8	-0.1	-0.4%	29.0	0.7	2.3%	28.9	0.7	2.5%
For nonreimbursed products ³	31.0	30.4	30.8	0.2	0.7%	29.1	1.9	6.7%	28.1	2.3	8.2%
For Non Rx products ⁴	18.7	18.5	18.5	0.2	1.2%	17.4	1.3	7.7%	17.1	1.4	7.9%
Average mark-up*											
Total ¹	25.1%	24.66%	24.5%	0.6%	2.6%	25.3%	-0.1%	-0.5%	24.7%	-0.1%	-0.2%
For reimbursed Rx products ²	18%	18.5%	18.1%	0.4%	2.1%	18.9%	-0.4%	-2.1%	18.9%	-0.5%	-2.4%
For nonreimbursed Rx products ³	23%	22.1%	21.6%	0.9%	4.3%	21.6%	1.0%	4.6%	21.2%	0.9%	4.1%
For Non Rx products ⁴	30%	28.8%	29.1%	0.5%	1.6%	29.9%	-0.3%	-1.1%	29.0%	-0.2%	-0.6%
Number of patients											
Total ¹	3 780	29 120	3 870	-90	-2.3%	3 450	330	9.6%	29 060	60	0.2%
For reimbursed Rx products ²	880	6 870	920	-40	-4.3%	690	190	27.5%	6 430	440	6.8%
For nonreimbursed Rx products ³	780	6 310	820	-40	-4.9%	680	100	14.7%	5 910	400	6.8%
For Non Rx products ⁴	3 020	23 430	3 090	-70	-2.3%	2 850	170	6.0%	23 790	-360	-1.5%
Number of pharmacies - summary[#]											
	13 253	13 322	13 280	-27	-0.2%	13 564	-284	-2.1%	13 673	-351	-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 -



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>

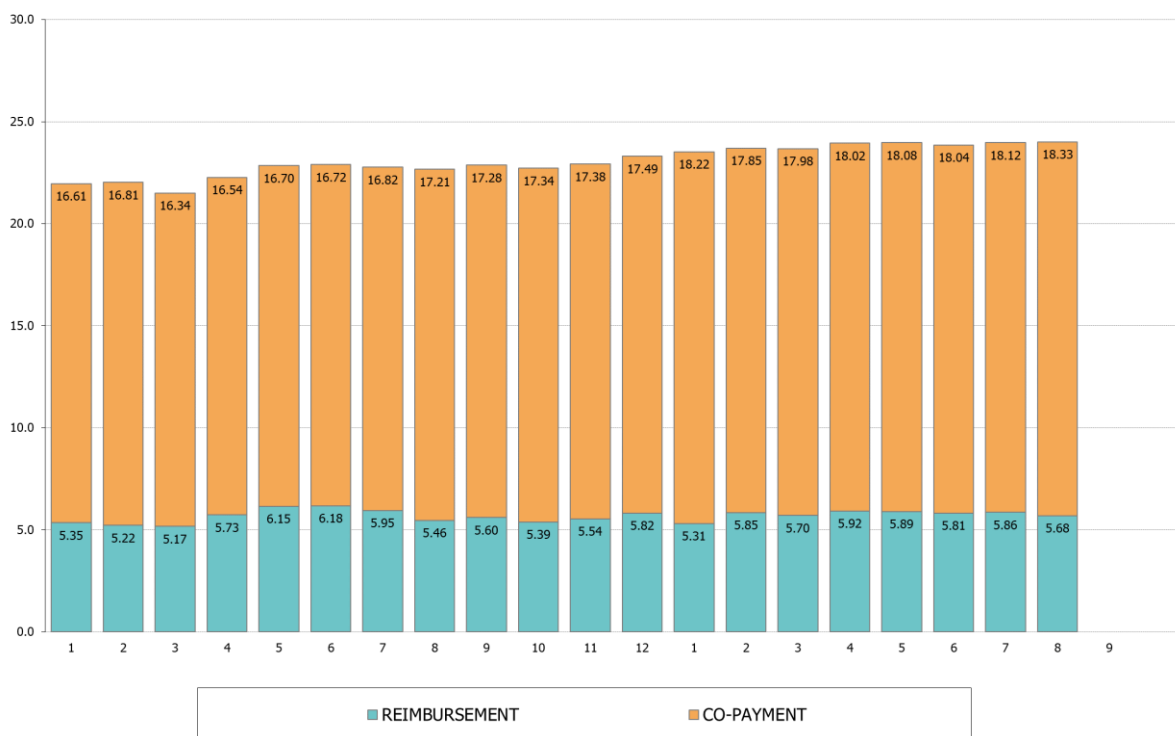


Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 10 000 000 zł

PEX PharmaSequence monthly report - August 2021

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

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 10 000 000 zł

PEX PharmaSequence monthly report - August 2021

PEX PharmaSequence commentary

The pharmacy market in August 2021 saw sales go close to 3167.5m PLN. Value of sales compared to July 2020 grew by 339.4m PLN (+12%). Compared to July of 2021, sales fell by approximately 106.1m PLN (-3.2%).

Compared to the same period of 2020 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 97.3m PLN (+10.8%), sales based on non-reimbursed prescriptions grew by 152.2m PLN (+23.5%), the non-prescription segment grew by 86.3m PLN (+6.8%).

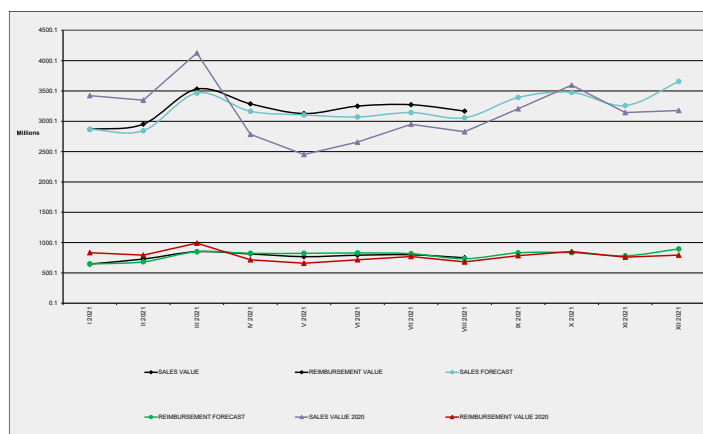
Compared to the previous month, the value of tracked segments grew for one monitored segments. Value of reimbursed prescriptions fell by 66.8m PLN (-6.3%), value of non-reimbursed RX drugs fell by 39.1m PLN (-4.7%) and value of products sold without a prescriptions grew by 2.1m PLN (+0.2%).

The average retail drug price in August 2021 was 24 PLN and was 0.2% higher than the average price in the previous month, and 5.9% higher than the average price in July 2020. The average retail price of reimbursed prescription was 29.7 PLN (+2.3% vs July 2020), 31 PLN for non-reimbursed prescriptions (+6.7% vs July 2020) and 18.7PLN for products sold without a prescription (+7.7% vs July 2020).

Average pharmacy margin for all drugs in August 2021 was 25.1% and was lower by 0.5% than margin in the same period of 2020. Compared to July 2021, the average pharmacy margin was higher by 2.6%.

Drug reimbursement by the National Health Fund in August was in the amount 750m PLN, 10.1% more than in the same period of 2020. The level of patient copayment for reimbursed drugs in August was 23.7%, fell by 0.8p.p. compared to previous month.

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

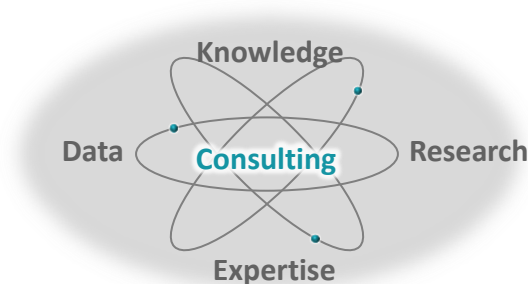


PEX PharmaSequence monthly report - August 2021

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

Ask us a question:
solutions_by_pex@pexps.pl
22 886 47 15

Published on the 23rd of September 2021, prepared by Elżbieta Brzeźny, Analyst based on PEX PharmaSequence data.

