



## PEX PharmaSequence monthly report - September 2021

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

	September 2021	Change in comparison to			Cumulative YTD		Forecast		
		August 2021	January 2021	September 2020	2021	Change vs 2020	2021	Change vs 2020	Change vs 2019
<b>Total turnover (PLN million)</b>									
Total open market <sup>1</sup>	<b>3 689</b>	16.5%	28.7%	15.1%	29 146	4.9%	39 639	5.1%	6.6%
Rx reimbursed <sup>2</sup>	<b>1 133</b>	13.9%	32.8%	8.7%	9 291	1.0%	13 022	5.0%	2.9%
Rx nonreimbursed <sup>3</sup>	<b>899</b>	12.5%	36.7%	23.6%	7 332	18.2%	9 021	6.8%	8.6%
Non Rx products <sup>4</sup>	<b>1 629</b>	20.9%	22.6%	15.4%	12 275	1.0%	17 262	4.2%	8.4%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>846</b>	12.8%	30.6%	7.8%	6 995	0.7%	9 532	1.9%	0.4%
Reimbursement share In total turnover	<b>22.9%</b>	-3.2%	1.5%	-6.4%	24.0%	-4.1%	24.0%	-3.1%	-5.9%
Reimbursement share In reimbursed sales	<b>73.5%</b>	-0.9%	-1.0%	-0.9%	74.0%	-0.6%	71.9%	-3.2%	-2.7%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>24.0</b>	0.1%	2.2%	5.1%	22.5	3.3%	22.6	2.7%	6.3%
For reimbursed Rx products <sup>2</sup>	<b>30.2</b>	1.6%	3.4%	3.6%	30.2	3.6%	30.4	2.5%	5.6%
For nonreimbursed Rx products <sup>3</sup>	<b>31.0</b>	0.1%	4.2%	5.1%	31.0	5.1%	30.6	3.7%	14.0%
For Non Rx products <sup>4</sup>	<b>18.9</b>	1.2%	3.1%	7.0%	18.9	7.0%	18.8	4.7%	10.3%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>26.2%</b>	4.4%	8.4%	2.5%	24.9%	0.0%	24.7%	-0.8%	-0.2%
For reimbursed Rx products <sup>2</sup>	<b>18.8%</b>	1.7%	2.6%	-3.0%	18.5%	-2.7%	18.6%	-1.5%	-3.2%
For nonreimbursed Rx products <sup>3</sup>	<b>25.3%</b>	12.3%	20.3%	12.3%	22.5%	5.2%	21.7%	1.6%	2.6%
For Non Rx products <sup>4</sup>	<b>30.2%</b>	2.2%	10.5%	0.7%	29.0%	-0.8%	28.5%	-1.9%	-1.8%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>4 370</b>	15.6%	34.9%	13.5%	33 490	1.8%	45 524	3.2%	-2.5%
Total turnover (PLN thousand) <sup>1</sup>	<b>279</b>	16.5%	30.1%	17.5%	2 190	7.7%	2 984	7.7%	14.0%

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

2021	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 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	29 146	4.9%	9 291	1.0%	7 332	18.2%	12 275	1.0%
October								
November								
December								

#### Retail sales in PLN

PEX PharmaSequence Sp. z o.o.,  
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 tel. 022-886-47-15, fax. 022-638-21-29  
 e-mail: biuro@pexps.pl  
<http://www.pexps.pl>

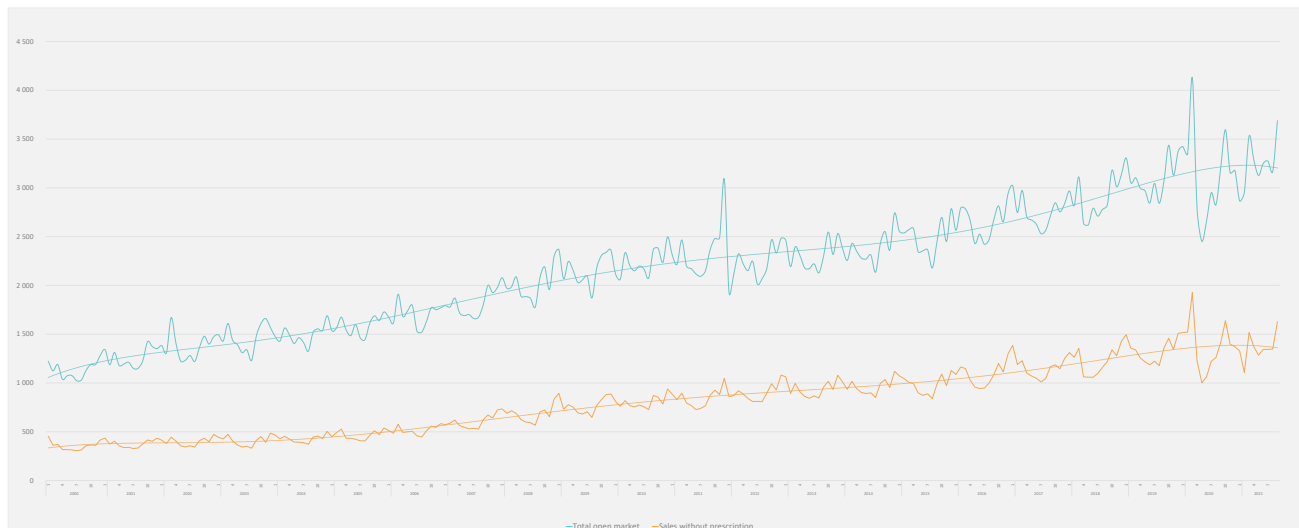
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 12 200 000 zł.



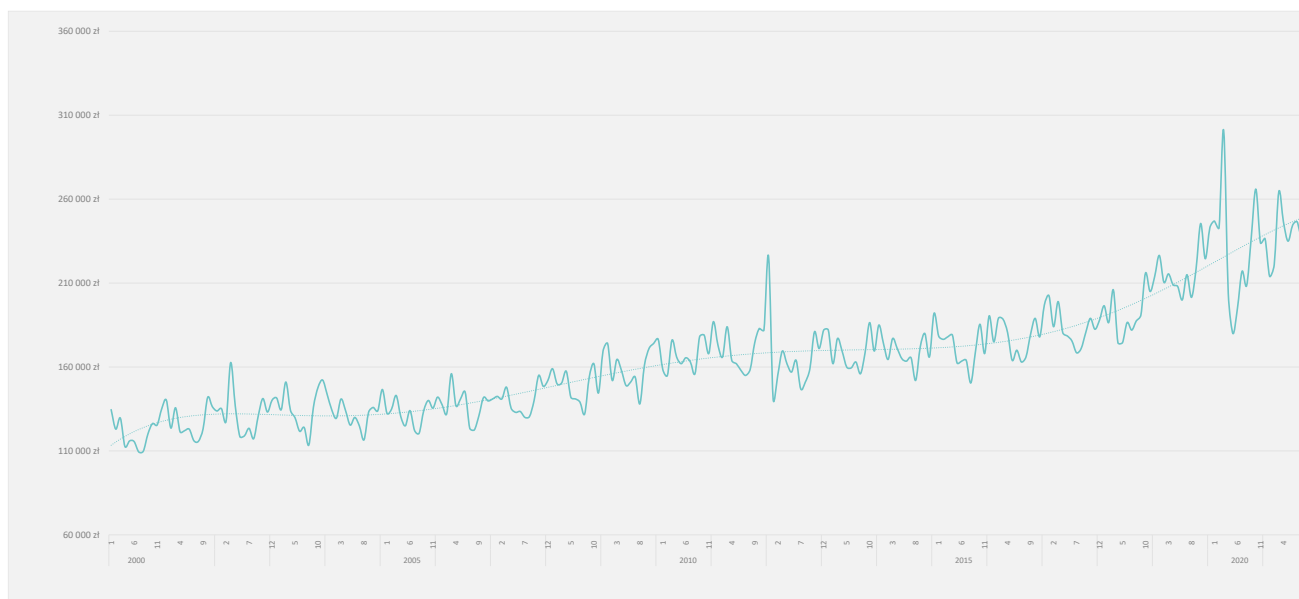
# PEX PharmaSequence monthly report - September 2021

## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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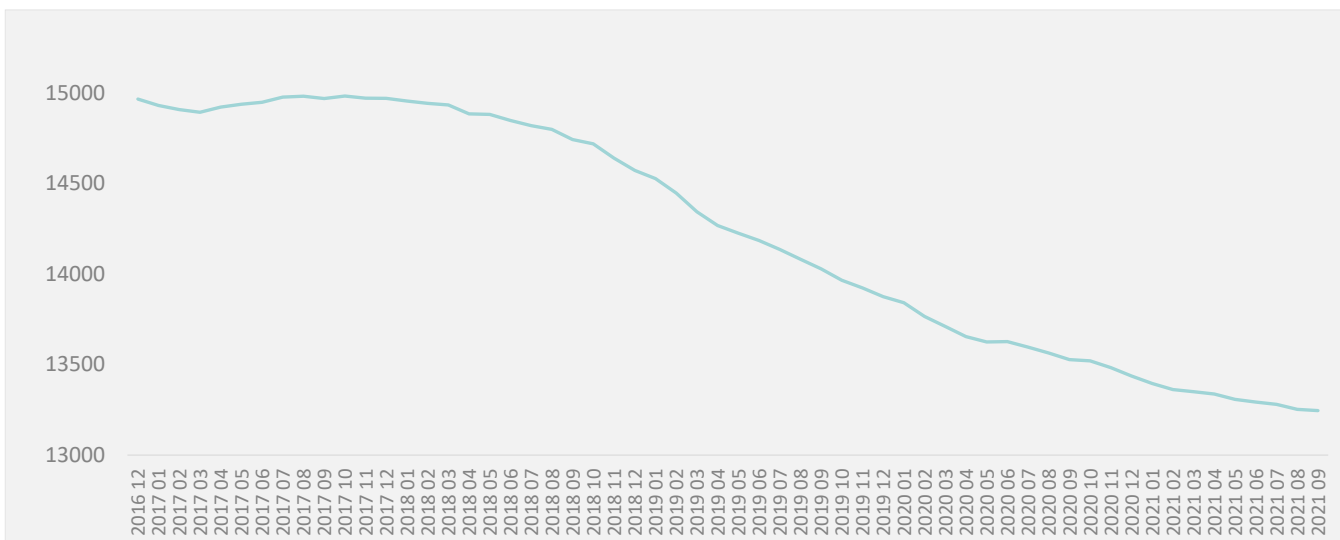
## PEX PharmaSequence monthly report - September 2021 average pharmacy

	September'21	YTD'2021	August'21	Change		September'20	Change		YTD'2020	Change	
				Value	%		Value	%		Value	%
<b>Total turnover (thousand PLN)</b>											
Total open market <sup>1</sup>	279	2 190	239	39.5	16.5%	237	41.5	17.5%	2 033	157.0	7.7%
Rx reimbursed <sup>2</sup>	86	698	75	10.5	13.9%	77	8.5	11.0%	673	25.0	3.7%
Rx nonreimbursed <sup>3</sup>	68	551	60	7.6	12.5%	54	14.1	26.3%	454	96.7	21.3%
Non Rx products <sup>4</sup>	123	922	102	21.3	21.0%	104	18.6	17.8%	889	32.9	3.7%
<b>Average price<sup>5</sup> per pack (PLN)</b>											
Total <sup>1</sup>	24.0	23.9	24.0	0.03	0.1%	22.9	1.2	5.1%	22.4	1.4	6.4%
For reimbursed Rx products <sup>2</sup>	30.2	29.7	29.7	0.5	1.6%	29.1	1.1	3.6%	29.0	0.8	2.6%
For nonreimbursed products <sup>3</sup>	31.0	30.4	31.0	0.0	0.1%	29.5	1.5	5.1%	28.2	2.2	7.9%
For Non Rx products <sup>4</sup>	18.9	18.5	18.7	0.2	1.2%	17.7	1.2	7.0%	17.2	1.3	7.8%
<b>Average mark-up*</b>											
Total <sup>1</sup>	26.2%	24.83%	25.1%	1.1%	4.4%	25.6%	0.6%	2.5%	24.8%	0.0%	0.1%
For reimbursed Rx products <sup>2</sup>	19%	18.5%	18.5%	0.3%	1.7%	19.4%	-0.6%	-3.0%	19.0%	-0.5%	-2.5%
For nonreimbursed Rx products <sup>3</sup>	25%	22.4%	22.5%	2.8%	12.3%	22.5%	2.8%	12.3%	21.4%	1.1%	5.1%
For Non Rx products <sup>4</sup>	30%	29.0%	29.6%	0.6%	2.2%	30.0%	0.2%	0.7%	29.1%	-0.1%	-0.5%
<b>Number of patients</b>											
Total <sup>1</sup>	4 370	33 490	3 780	590	15.6%	3 850	520	13.5%	32 910	580	1.8%
For reimbursed Rx products <sup>2</sup>	1 000	7 870	880	120	13.6%	860	140	16.3%	7 290	580	8.0%
For nonreimbursed Rx products <sup>3</sup>	910	7 220	780	130	16.7%	770	140	18.2%	6 680	540	8.1%
For Non Rx products <sup>4</sup>	3 540	26 970	3 020	520	17.2%	3 120	420	13.5%	26 910	60	0.2%
<b>Number of pharmacies - summary<sup>#</sup></b>											
	13 246	13 314	13 253	-7	-0.1%	13 527	-274	-2.0%	13 657	-343	-2.5%

\*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 -



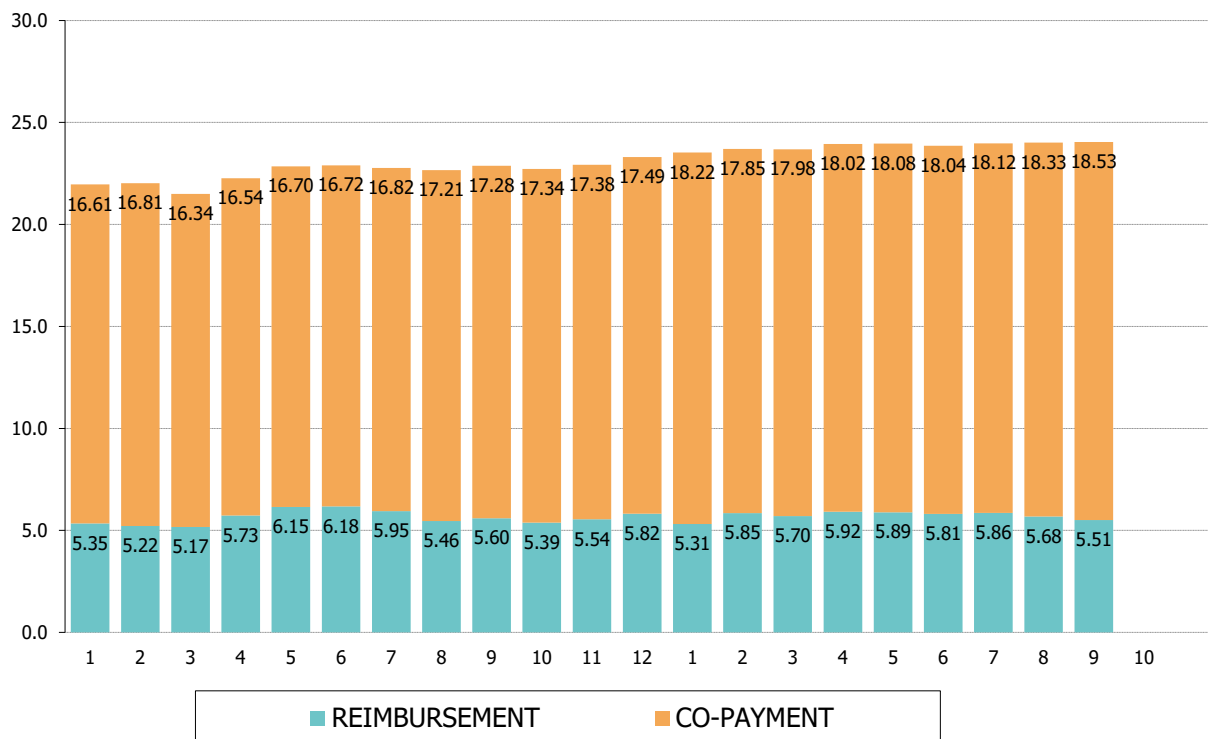
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## Price

- 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 - September 2021

## PEX PharmaSequence commentary

**The pharmacy market in September 2021** saw sales go close to 3689m PLN. Value of sales compared to August 2020 grew by 483.1m PLN (+15.1%). Compared to August of 2021, sales grew by approximately 521.5m PLN (+16.5%).

**Compared to the same period of 2020** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 91m PLN (+8.7%), sales based on non-reimbursed prescriptions grew by 171.8m PLN (+23.6%), the non-prescription segment grew by 217.1m PLN (+15.4%).

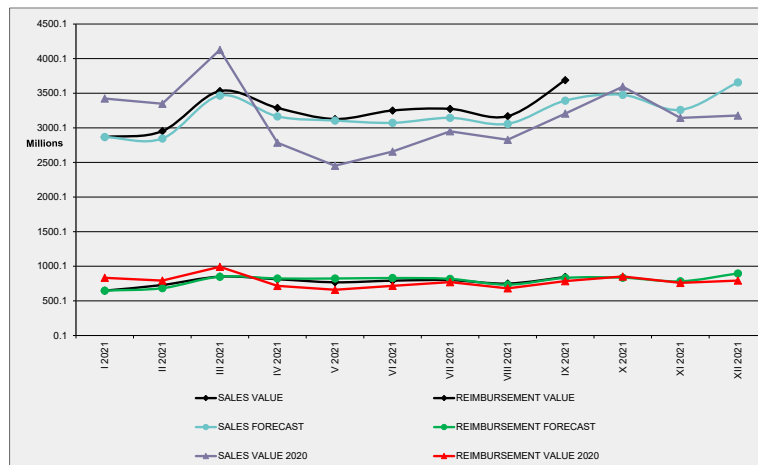
**Compared to the previous month**, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 138.1m PLN (+13.9%), value of non-reimbursed RX drugs grew by 99.8m PLN (+12.5%) and value of products sold without a prescriptions grew by 282.1m PLN (+20.9%).

**The average retail drug price in September 2021** was 24 PLN and was 0.1% higher than the average price in the previous month, and 5.1% higher than the average price in August 2020. The average retail price of reimbursed prescription was 30.2 PLN (+3.6% vs August 2020), 31 PLN for non-reimbursed prescriptions (+5.1% vs August 2020) and 18.9PLN for products sold without a prescription (+7% vs August 2020).

**Average pharmacy margin** for all drugs in September 2021 was 26.2% and was higher by 2.5% than margin in the same period of 2020. Compared to August 2021, the average pharmacy margin was higher by 4.4%.

**Drug reimbursement by the National Health Fund** in September was in the amount 846m PLN, 7.8% more than in the same period of 2020. The level of patient copayment for reimbursed drugs in September was 22.9%, fell by 0.7p.p. compared to previous month.

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

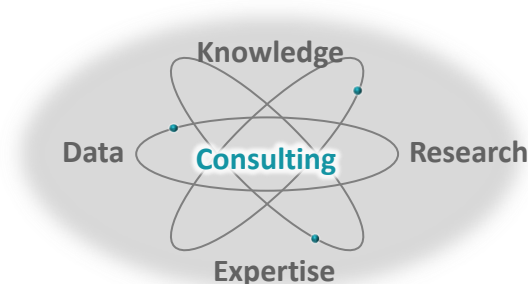


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### About us

**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](http://www.pexps.pl) more info

Ask us a question:  
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Published on the 21st of October 2021, prepared by Elżbieta Brzeźny, Analyst based on PEX PharmaSequence data.

