



## PEX PharmaSequence monthly report - October 2021

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

	October 2021	Change in comparison to			Cumulative YTD		Forecast		
		September 2021	January 2021	October 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>3 753</b>	1.7%	30.9%	4.4%	32 899	4.9%	39 877	5.8%	7.3%
Rx reimbursed <sup>2</sup>	<b>1 155</b>	1.9%	35.4%	1.7%	10 445	1.1%	13 062	5.4%	3.2%
Rx nonreimbursed <sup>3</sup>	<b>934</b>	3.9%	42.1%	17.5%	8 266	18.1%	9 040	7.0%	8.8%
Non Rx products <sup>4</sup>	<b>1 633</b>	0.3%	22.9%	-0.3%	13 909	0.8%	17 442	5.3%	9.6%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>863</b>	2.1%	33.3%	1.3%	7 858	0.7%	9 552	2.1%	0.6%
Reimbursement share In total turnover	<b>23.0%</b>	0.3%	1.8%	-3.0%	23.9%	-3.9%	24.0%	-3.5%	-6.3%
Reimbursement share In reimbursed sales	<b>73.5%</b>	0.0%	-1.0%	-0.6%	73.9%	-0.6%	71.9%	-3.3%	-2.8%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>24.3</b>	1.2%	3.4%	7.1%	23.9	9.6%	23.9	8.7%	12.5%
For reimbursed Rx products <sup>2</sup>	<b>30.3</b>	0.5%	3.9%	4.1%	29.8	2.3%	30.2	1.7%	4.9%
For nonreimbursed Rx products <sup>3</sup>	<b>31.2</b>	0.6%	4.9%	5.7%	30.5	3.5%	30.4	2.8%	12.9%
For Non Rx products <sup>4</sup>	<b>19.2</b>	1.2%	4.4%	8.3%	18.6	5.2%	18.6	3.5%	9.0%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>25.0%</b>	-0.5%	3.2%	-2.4%	24.9%	0.0%	24.7%	-0.5%	0.1%
For reimbursed Rx products <sup>2</sup>	<b>17.9%</b>	-2.9%	-2.0%	-7.3%	18.5%	-2.8%	18.5%	-2.0%	-3.6%
For nonreimbursed Rx products <sup>3</sup>	<b>22.4%</b>	-0.5%	6.5%	-0.5%	22.5%	5.2%	22.0%	2.9%	3.8%
For Non Rx products <sup>4</sup>	<b>29.6%</b>	0.0%	8.2%	-1.4%	29.0%	-0.7%	28.7%	-1.3%	-1.2%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>4 420</b>	1.1%	36.4%	7.5%	37 910	2.4%	45 784	3.8%	-2.0%
Total turnover (PLN thousand) <sup>1</sup>	<b>284</b>	2.0%	32.7%	6.8%	2 474	7.6%	3 002	8.4%	14.7%

### - 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	32 899	4.9%	10 445	1.1%	8 266	18.1%	13 909	0.8%
November								
December								

#### Retail sales in PLN

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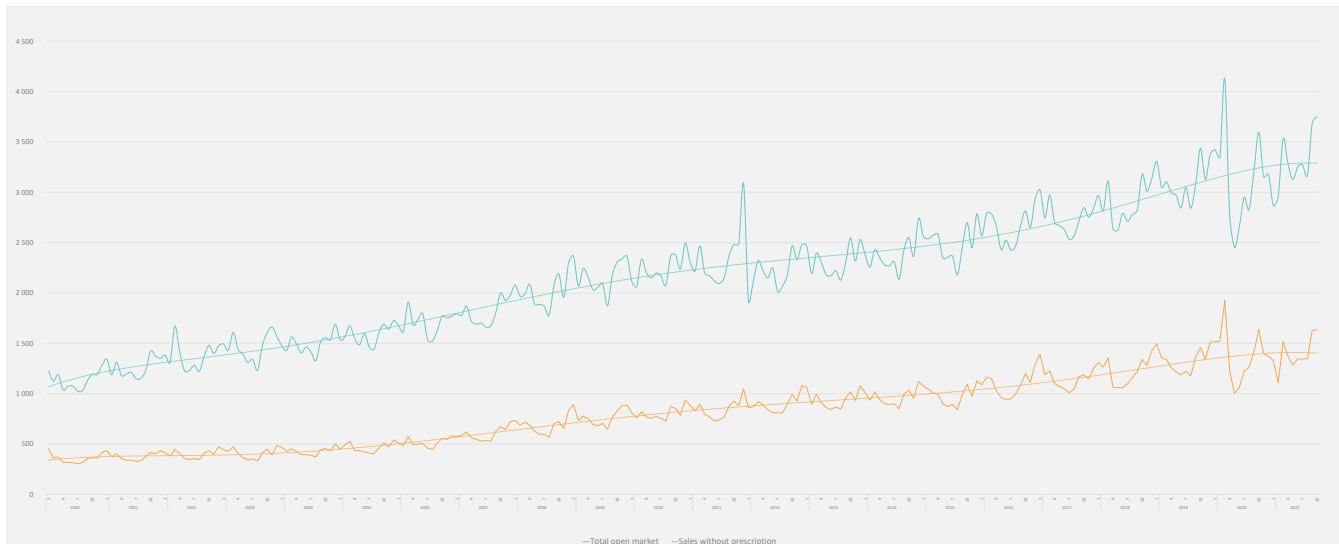
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,  
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 12 200 000 zł.



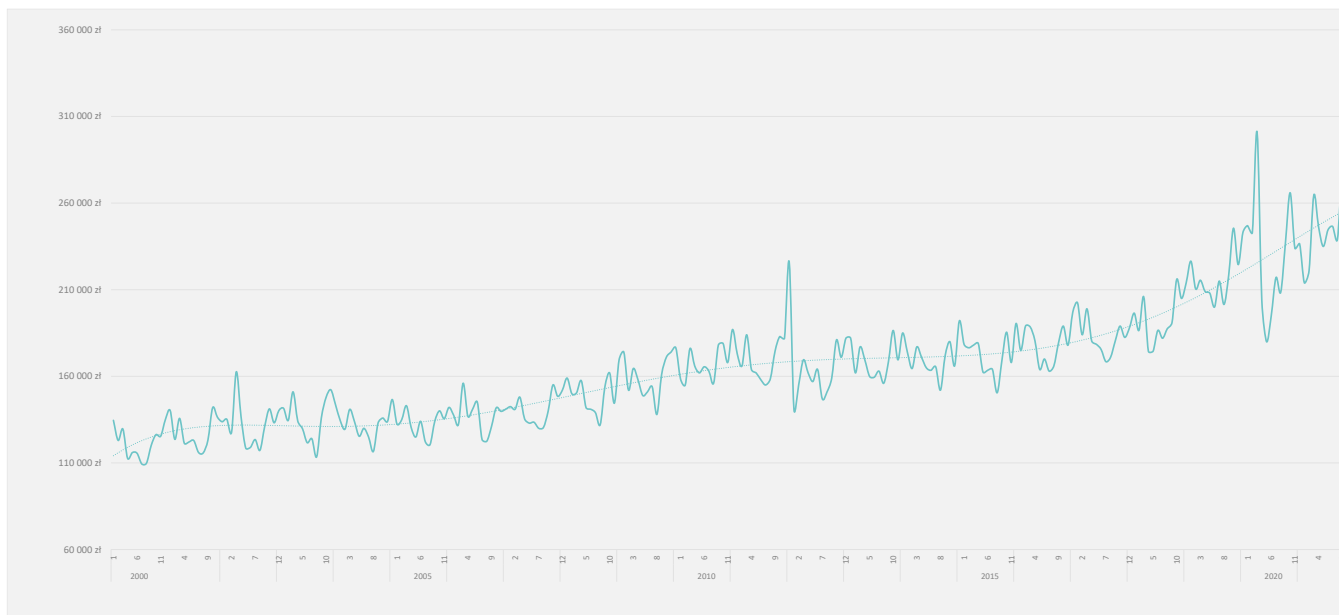
# PEX PharmaSequence monthly report - October 2021

## 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 - October 2021

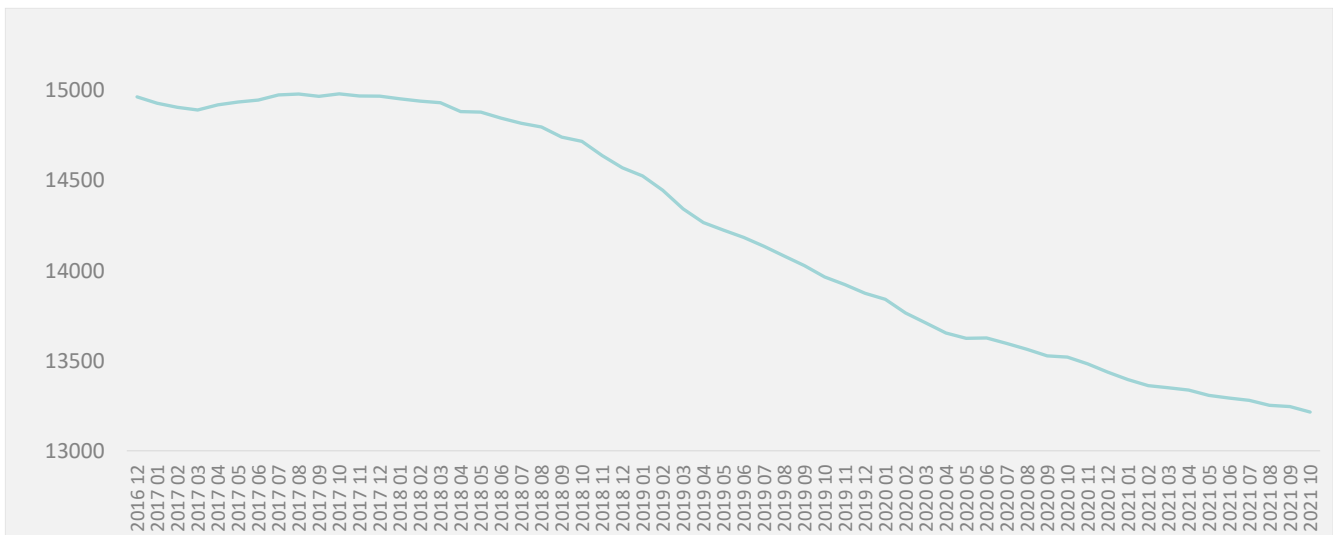
### average pharmacy

	October'21	YTD'2021	September'21	Change		October'20	Change		YTD'2020	Change	
				Value	%		Value	%		Value	%
<b>Total turnover (thousand PLN)</b>											
Total open market <sup>1</sup>	284	2 474	279	5.5	2.0%	266	18.0	6.8%	2 299	175.0	7.6%
Rx reimbursed <sup>2</sup>	87	785	86	1.8	2.1%	84	3.4	4.1%	757	28.4	3.8%
Rx nonreimbursed <sup>3</sup>	71	621	68	2.8	4.2%	59	11.9	20.2%	513	108.6	21.2%
Non Rx products <sup>4</sup>	124	1 046	123	0.6	0.5%	121	2.4	2.0%	1 010	35.4	3.5%
<b>Average price<sup>5</sup> per pack (PLN)</b>											
Total <sup>1</sup>	24.3	23.9	24.0	0.29	1.2%	22.7	1.6	7.1%	22.5	1.4	6.5%
For reimbursed Rx products <sup>2</sup>	30.3	29.8	30.2	0.2	0.5%	29.1	1.2	4.1%	29.0	0.8	2.7%
For nonreimbursed products <sup>3</sup>	31.2	30.5	31.0	0.2	0.6%	29.5	1.7	5.7%	28.4	2.2	7.6%
For Non Rx products <sup>4</sup>	19.2	18.6	18.9	0.2	1.2%	17.7	1.5	8.3%	17.2	1.4	7.9%
<b>Average mark-up*</b>											
Total <sup>1</sup>	25.0%	24.85%	26.2%	-1.2%	-4.8%	25.0%	0.0%	-0.1%	24.8%	0.0%	0.1%
For reimbursed Rx products <sup>2</sup>	18%	18.5%	18.8%	-0.8%	-4.4%	18.6%	-0.7%	-3.6%	19.0%	-0.5%	-2.6%
For nonreimbursed Rx products <sup>3</sup>	22%	22.4%	25.3%	-2.9%	-11.4%	21.5%	1.0%	4.5%	21.4%	1.1%	5.0%
For Non Rx products <sup>4</sup>	30%	29.0%	30.2%	-0.6%	-2.1%	29.5%	0.1%	0.2%	29.1%	-0.1%	-0.4%
<b>Number of patients</b>											
Total <sup>1</sup>	4 420	37 910	4 370	50	1.1%	4 110	310	7.5%	37 020	890	2.4%
For reimbursed Rx products <sup>2</sup>	1 030	8 900	1 000	30	3.0%	930	100	10.8%	8 220	680	8.3%
For nonreimbursed Rx products <sup>3</sup>	950	8 170	910	40	4.4%	830	120	14.5%	7 510	660	8.8%
For Non Rx products <sup>4</sup>	3 560	30 530	3 540	20	0.6%	3 370	190	5.6%	30 280	250	0.8%
<b>Number of pharmacies - summary<sup>#</sup></b>											
	13 215	13 304	13 246	-31	-0.2%	13 520	-274	-2.0%	13 643	-339	-2.5%

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

<sup>#</sup> Number of pharmacies based on PEX's analysis.

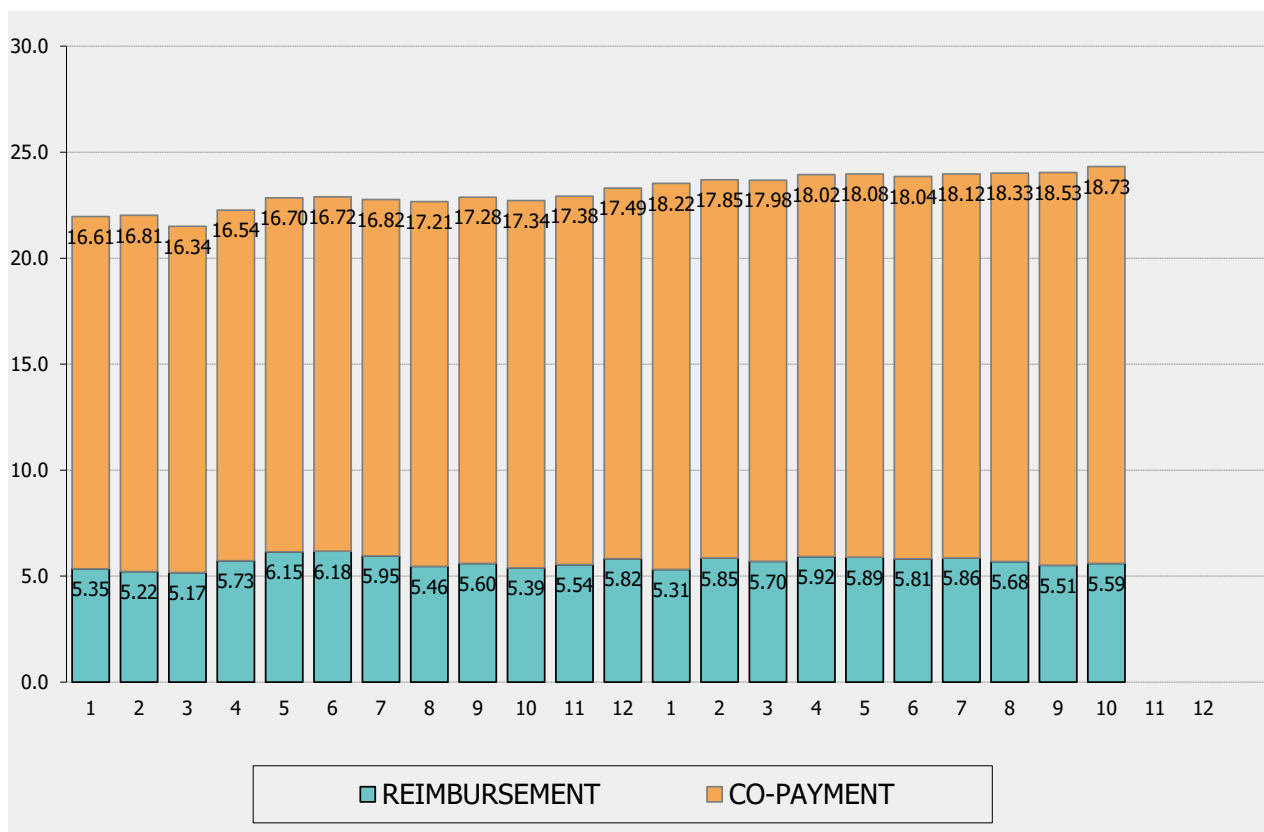
### - Pharmacies on the open market -



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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.

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## PEX PharmaSequence monthly report - October 2021

### PEX PharmaSequence commentary

**The pharmacy market in October 2021** saw sales go close to 3753.1m PLN. Value of sales compared to September 2020 grew by 156.7m PLN (+4.4%). Compared to September of 2021, sales grew by approximately 64m PLN (+1.7%).

**Compared to the same period of 2020** the value of tracked segments grew for two monitored segments. Sales based on reimbursed prescriptions grew by 19.5m PLN (+1.7%), sales based on non-reimbursed prescriptions grew by 139m PLN (+17.5%), the non-prescription segment fell by 5m PLN (-0.3%).

**Compared to the previous month**, the value of tracked segments grew for all monitored segments. Value of reimbursed prescriptions grew by 21.6m PLN (+1.9%), value of non-reimbursed RX drugs grew by 35.5m PLN (+3.9%) and value of products sold without a prescriptions grew by 4.2m PLN (+0.3%).

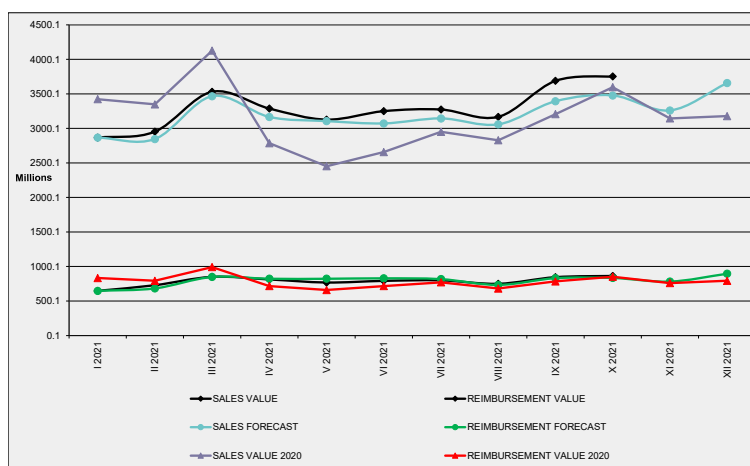
**The average retail drug price in October 2021** was 24.3 PLN and was 1.2% higher than the average price in the previous month, and 7.1% higher than the average price in September 2020. The average retail price of reimbursed prescription was 30.3 PLN (+4.1% vs September 2020), 31.2 PLN for non-reimbursed prescriptions (+5.7% vs September 2020) and 19.2PLN for products sold without a prescription (+8.3% vs September 2020).

**Average pharmacy margin** for all drugs in October 2021 was 25% and was lower by 0.1% than margin in the same period of 2020. Compared to September 2021, the average pharmacy margin was lower by 4.8%.

**Drug reimbursement by the National Health Fund** in October was in the amount 863m PLN, 10% more than in the same period of 2020.

The level of patient copayment for reimbursed drugs in October was 23%, grew by 0.1p.p. compared to previous month.

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

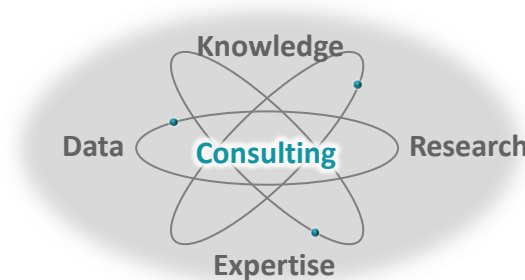


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### About us

**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 18th of November 2021, prepared by Elżbieta Brzeźny, Analyst based on PEX PharmaSequence data.

