



PEX PharmaSequence monthly report - November 2021

Total open market (sell-out report)

	November 2021	Change in comparison to			Cumulative YTD		Forecast		
		October 2021	January 2021	November 2020	2021	Change vs 2020	2021	Change vs 2020	Change vs 2019
Total turnover (PLN million)									
Total open market ¹	3 719	-0.9%	29.7%	17.9%	36 618	6.0%	40 304	6.9%	8.4%
Rx reimbursed ²	1 140	-1.3%	33.6%	12.3%	11 585	2.1%	13 025	5.1%	2.9%
Rx nonreimbursed ³	918	-1.7%	39.8%	28.0%	9 184	19.0%	9 500	12.5%	14.4%
Non Rx products ⁴	1 631	-0.1%	22.8%	16.8%	15 540	2.3%	17 445	5.3%	9.6%
Reimbursement									
Reimbursement value (PLN million)	851	-1.5%	31.4%	11.5%	8 709	1.7%	9 612	2.7%	1.2%
Reimbursement share In total turnover	22.9%	-0.6%	1.3%	-5.4%	23.8%	-4.1%	23.8%	-3.9%	-6.7%
Reimbursement share In reimbursed sales	73.4%	-0.1%	-1.1%	-0.7%	73.9%	-0.6%	72.5%	-2.4%	-1.9%
Average price per pack (PLN)									
Total ¹	24.4	0.2%	3.6%	6.3%	24.0	9.4%	23.7	7.8%	11.6%
For reimbursed Rx products ²	30.2	-0.5%	3.4%	3.3%	29.8	2.2%	30.0	1.0%	4.1%
For nonreimbursed Rx products ³	31.4	0.7%	5.5%	6.5%	30.6	3.8%	30.2	2.1%	12.2%
For Non Rx products ⁴	19.3	0.8%	5.2%	8.7%	18.7	5.2%	18.6	3.2%	8.7%
Average mark-up									
Total ¹	25.4%	1.4%	4.7%	1.6%	24.9%	0.2%	24.8%	0.0%	0.6%
For reimbursed Rx products ²	18.2%	1.5%	-0.5%	-2.3%	18.4%	-2.7%	18.5%	-2.2%	-3.9%
For nonreimbursed Rx products ³	23.9%	6.7%	13.6%	9.6%	22.6%	5.6%	22.4%	4.6%	5.6%
For Non Rx products ⁴	29.3%	-0.8%	7.3%	0.3%	29.1%	-0.5%	28.9%	-0.6%	-0.6%
Average pharmacy									
Number of patients in pharmacies	4 240	-4.1%	30.9%	21.1%	42 150	4.0%	46 216	4.8%	-1.1%
Total turnover (PLN thousand) ¹	284	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 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	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	36 618	6.0%	11 585	2.1%	9 184	19.0%	15 540	2.3%
December								

Retail sales in PLN

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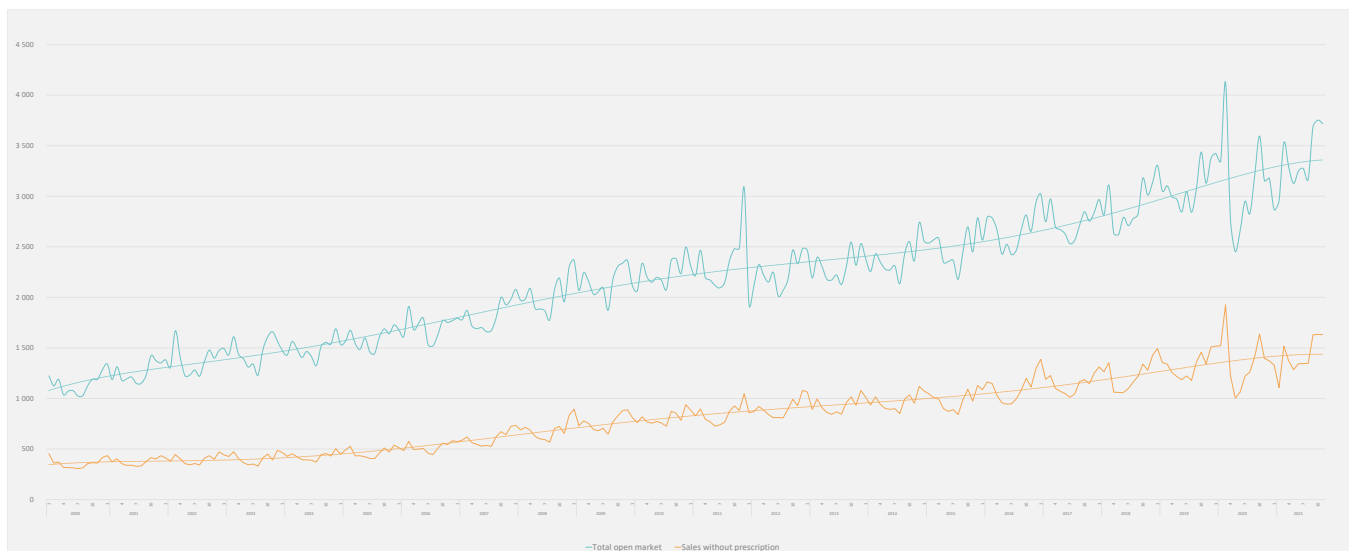
Sąd Rejonowy dla m. st. Warszawy w Warszawie, XIII Wydział Gospodarczy,
 KRS 0000178089, REGON: 015579675, NIP 9512093564, kapitał zakładowy 12 200 000 zł.



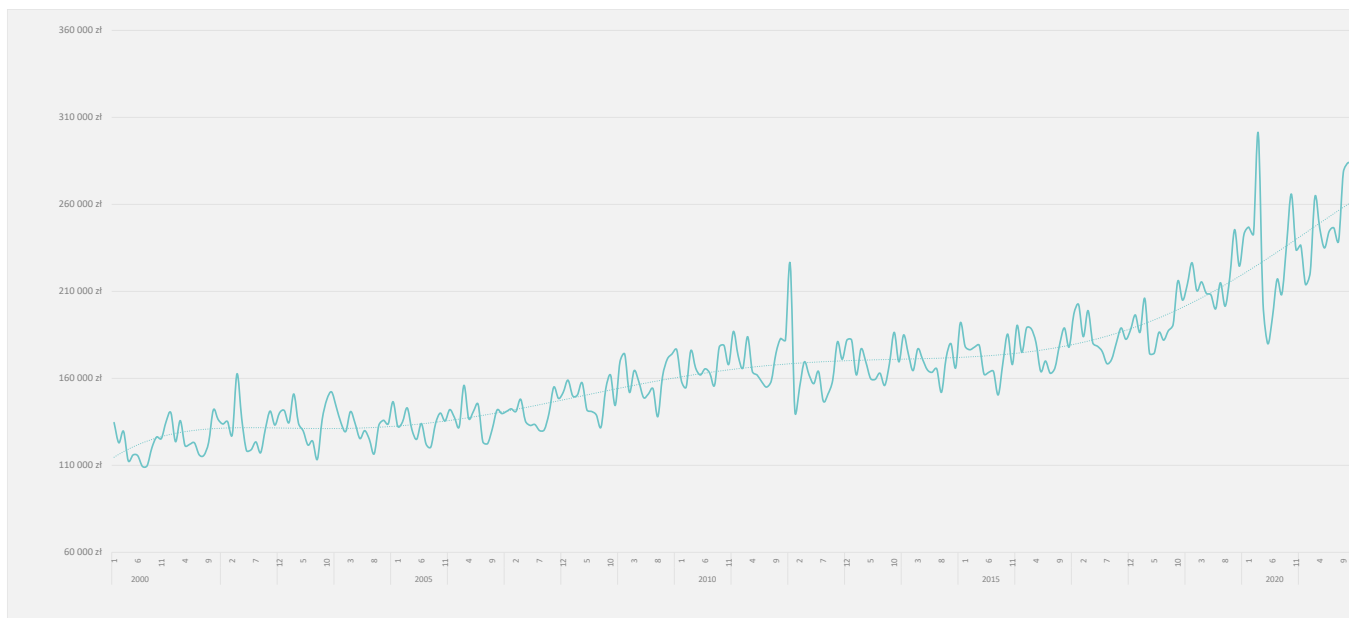
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Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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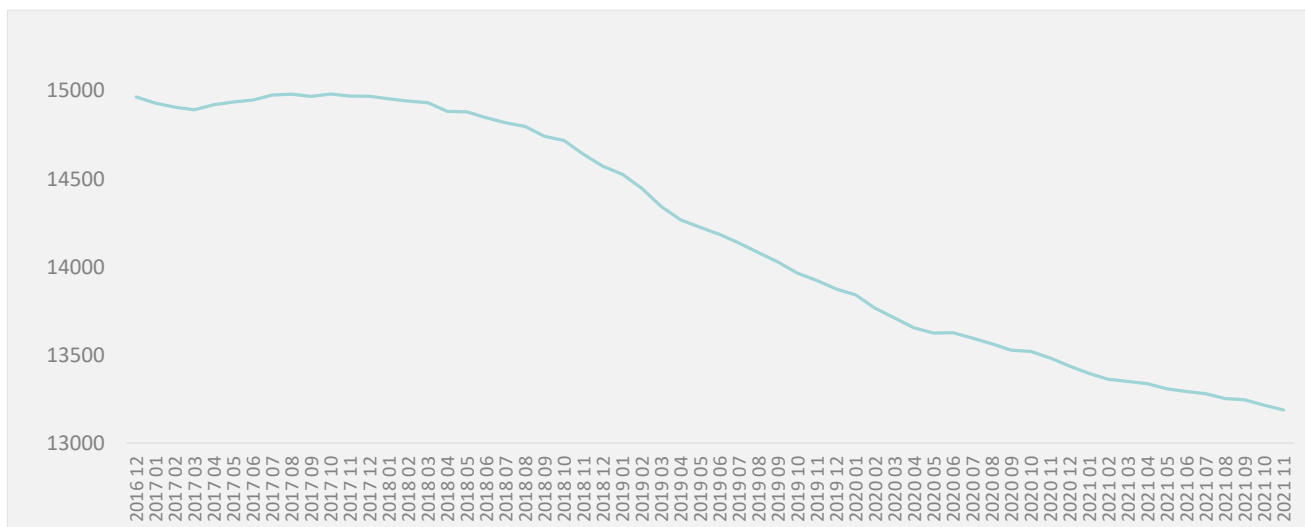
PEX PharmaSequence monthly report - November 2021 average pharmacy

	November'21	YTD'2021	October'21		November'20			YTD'2020			
			Value	%	Value	%	Value	%			
Total turnover (thousand PLN)											
Total open market ¹	282	2 756	284	-2.0	-0.7%	234	48.0	20.5%	2 533	223.0	8.8%
Rx reimbursed ²	86	872	87	-0.9	-1.1%	75	11.2	14.9%	832	39.6	4.8%
Rx nonreimbursed ³	70	691	71	-1.0	-1.5%	53	16.4	30.9%	566	125.0	22.1%
Non Rx products ⁴	124	1 169	124	0.1	0.1%	104	20.1	19.4%	1 114	55.5	5.0%
Average price⁵ per pack (PLN)											
Total ¹	24.4	23.9	24.3	0.05	0.2%	22.9	1.5	6.3%	22.5	1.4	6.4%
For reimbursed Rx products ²	30.2	29.8	30.3	-0.1	-0.5%	29.2	1.0	3.3%	29.0	0.8	2.8%
For nonreimbursed products ³	31.4	30.6	31.2	0.2	0.7%	29.5	1.9	6.5%	28.5	2.1	7.5%
For Non Rx products ⁴	19.3	18.7	19.2	0.1	0.8%	17.8	1.5	8.7%	17.3	1.4	8.0%
Average mark-up*											
Total ¹	25.4%	24.89%	25.0%	0.4%	1.4%	25.0%	0.4%	1.6%	24.8%	0.1%	0.2%
For reimbursed Rx products ²	18%	18.4%	17.9%	0.3%	1.5%	18.7%	-0.4%	-2.3%	18.9%	-0.5%	-2.6%
For nonreimbursed Rx products ³	24%	22.6%	22.4%	1.5%	6.7%	21.8%	2.1%	9.6%	21.4%	1.2%	5.4%
For Non Rx products ⁴	29%	29.0%	29.6%	-0.2%	-0.8%	29.2%	0.1%	0.3%	29.1%	-0.1%	-0.3%
Number of patients											
Total ¹	4 240	42 150	4 420	-180	-4.1%	3 500	740	21.1%	40 520	1630	4.0%
For reimbursed Rx products ²	990	9 890	1 030	-40	-3.9%	820	170	20.7%	9 040	850	9.4%
For nonreimbursed Rx products ³	910	9 080	950	-40	-4.2%	750	160	21.3%	8 260	820	9.9%
For Non Rx products ⁴	3 440	33 970	3 560	-120	-3.4%	2 850	590	20.7%	33 130	840	2.5%
Number of pharmacies - summary[#]											
	13 188	13 293	13 215	-27	-0.2%	13 483	-268	-2.0%	13 628	-335	-2.5%

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

Number of pharmacies based on PEX's analysis.

- Pharmacies on the open market -



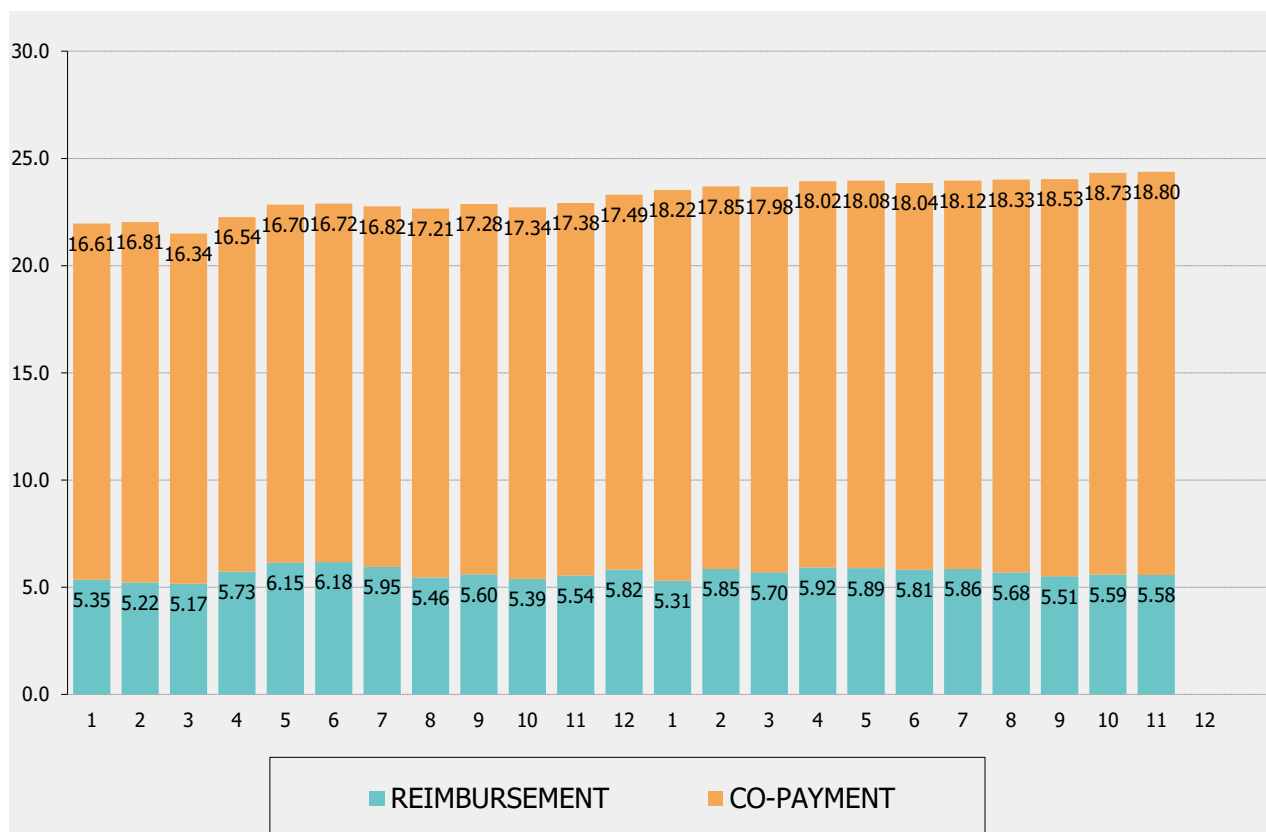
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Price

- 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 November 2021 saw sales go close to 3719m PLN. Value of sales compared to November 2020 grew by 564m PLN (+17.9%). Compared to October of 2021, sales fell by approximately 34m PLN (-0.9%).

Compared to the same period of 2020 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 125.3m PLN (+12.3%), sales based on non-reimbursed prescriptions grew by 201.1m PLN (+28%), the non-prescription segment grew by 234.4m PLN (+16.8%).

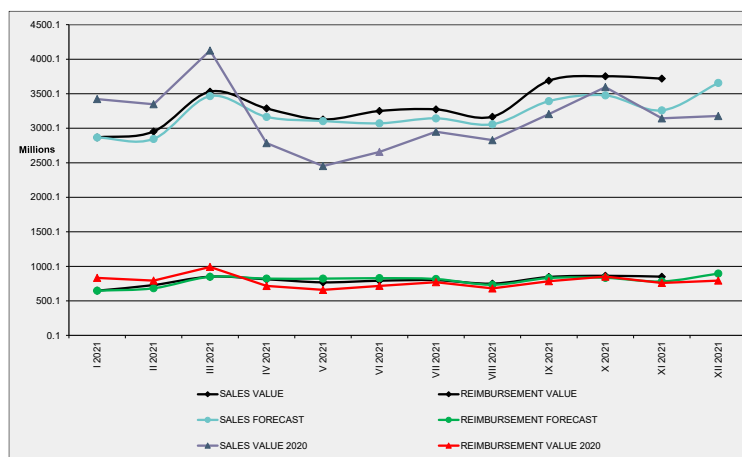
Compared to the previous month, the value of tracked segments fell for all monitored segments. Value of reimbursed prescriptions fell by 14.6m PLN (-1.3%), value of non-reimbursed RX drugs fell by 15.7m PLN (-1.7%) and value of products sold without a prescriptions fell by 1.9m PLN (-0.1%).

The average retail drug price in November 2021 was 24.4 PLN and was 0.2% higher than the average price in the previous month, and 6.3% higher than the average price in November 2020. The average retail price of reimbursed prescription was 30.2 PLN (+3.3% vs November 2020), 31.4 PLN for non-reimbursed prescriptions (+6.5% vs November 2020) and 19.3 PLN for products sold without a prescription (+8.7% vs November 2020).

Average pharmacy margin for all drugs in November 2021 was 25.4% and was higher by 1.6% than margin in the same period of 2020. Compared to October 2021, the average pharmacy margin was higher by 1.4%.

Drug reimbursement by the National Health Fund in November was in the amount 851m PLN, 11.5% more than in the same period of 2020. The level of patient copayment for reimbursed drugs in November was 22.9%, fell by 0.1p.p. compared to previous month.

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

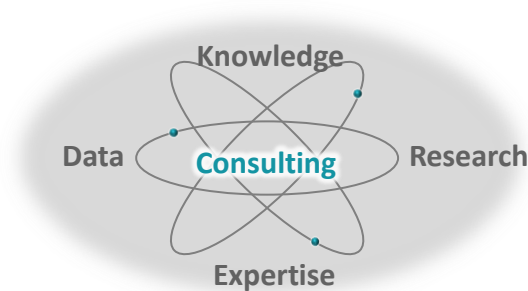


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About us

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 more info

Ask us a question:
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Published on the 17th of December 2021, prepared by Elżbieta Brzeźny, Analyst based on PEX PharmaSequence data.

