

## PEX PharmaSequence monthly report - January 2022

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

	January 2022	Change in comparison to			Cumulative YTD		Forecast		
		December 2021	January 2022	January 2021	2022	Change vs 2021	2022	Change vs 2021	Change vs 2020
<b>Total turnover (PLN million)</b>									
Total open market <sup>1</sup>	<b>3 639</b>	-8.1%	0.0%	26.9%	3 639	26.9%	41 855	3.2%	11.0%
Rx reimbursed <sup>2</sup>	<b>1 012</b>	-15.4%	0.0%	18.6%	1 012	18.6%	12 796	0.1%	3.2%
Rx nonreimbursed <sup>3</sup>	<b>877</b>	-9.7%	0.0%	33.5%	877	33.5%	10 272	1.1%	21.6%
Non Rx products <sup>4</sup>	<b>1 717</b>	-2.5%	0.0%	29.2%	1 717	29.2%	18 426	6.5%	11.3%
<b>Reimbursement</b>									
Reimbursement value (PLN million)	<b>765</b>	-14.7%	0.0%	18.1%	765	18.1%	9 783	1.9%	4.5%
Reimbursement share In total turnover	<b>21.0%</b>	-7.2%	0.0%	-7.0%	21.0%	-7.0%	23.4%	-1.2%	-5.8%
Reimbursement share In reimbursed sales	<b>74.0%</b>	0.4%	0.0%	-0.3%	74.0%	-0.3%	75.1%	1.7%	1.1%
<b>Average price per pack (PLN)</b>									
Total <sup>1</sup>	<b>24.3</b>	-1.3%	0.0%	3.4%	24.3	3.4%	24.5	1.9%	8.7%
For reimbursed Rx products <sup>2</sup>	<b>29.9</b>	-2.1%	0.0%	2.6%	29.9	2.6%	30.9	3.5%	6.5%
For nonreimbursed Rx products <sup>3</sup>	<b>31.4</b>	-0.7%	0.0%	5.4%	31.4	5.4%	31.6	3.0%	10.9%
For Non Rx products <sup>4</sup>	<b>19.9</b>	1.2%	0.0%	8.1%	19.9	8.1%	19.0	1.4%	9.9%
<b>Average mark-up</b>									
Total <sup>1</sup>	<b>25.5%</b>	0.4%	0.0%	5.3%	25.5%	5.3%	24.7%	-1.0%	-0.5%
For reimbursed Rx products <sup>2</sup>	<b>17.7%</b>	-4.1%	0.0%	-3.1%	17.7%	-3.1%	18.6%	1.0%	-1.4%
For nonreimbursed Rx products <sup>3</sup>	<b>21.7%</b>	-4.6%	0.0%	2.9%	21.7%	2.9%	20.7%	-8.5%	-3.2%
For Non Rx products <sup>4</sup>	<b>29.2%</b>	-2.3%	0.0%	7.0%	29.2%	7.0%	28.9%	-0.9%	-0.7%
<b>Average pharmacy</b>									
Number of patients in pharmacies	<b>4 180</b>	-6.7%	0.0%	29.0%	4 180	29.0%	47 034	0.9%	6.7%
Total turnover (PLN thousand) <sup>1</sup>	<b>278</b>	-7.8%	0.0%	29.7%	278	29.7%	3 206	4.9%	15.8%

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

2022	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 2021	Total	Change vs 2021	Total	Change vs 2021	Total	Change vs 2021
January	3 639	26.9%	1 012	18.6%	877	33.5%	1 717	29.2%
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								

#### Retail sales in PLN

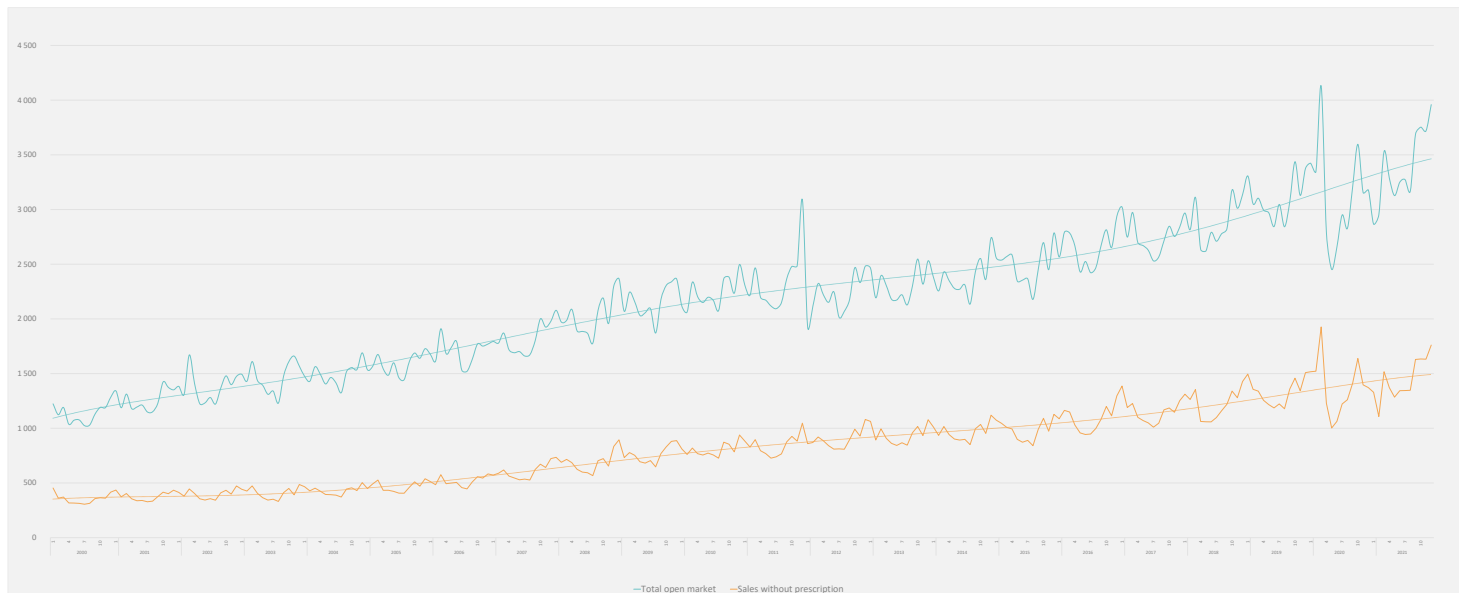
PEX PharmaSequence Sp. z o.o.,  
 ul. Kłobucka 23, 02-699 Warszawa  
 tel. 022-886-47-15, fax. 022-638-21-29  
 e-mail: [biuro@pexps.pl](mailto:biuro@pexps.pl)  
<http://www.pexps.pl>

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

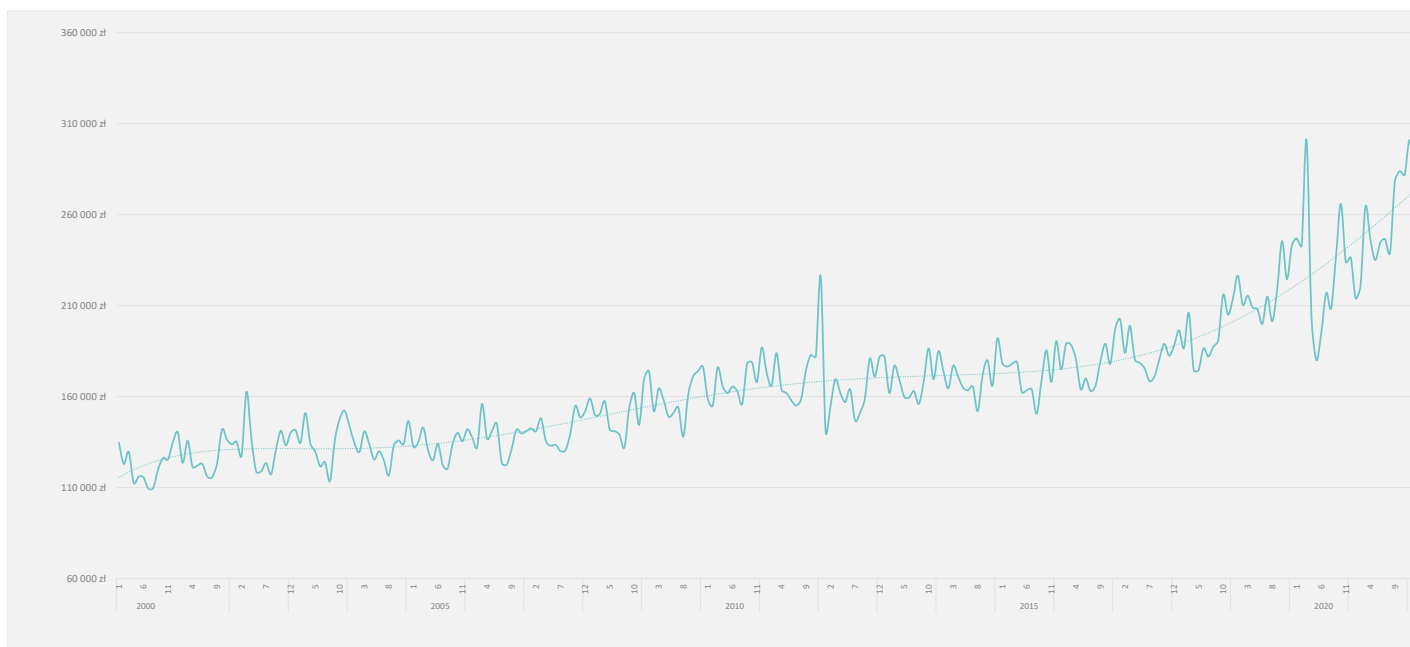
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## Trends

- Total monthly pharmacy sales in PLN million -



- Total monthly sales in an average pharmacy in PLN -



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## PEX PharmaSequence monthly report - January 2022

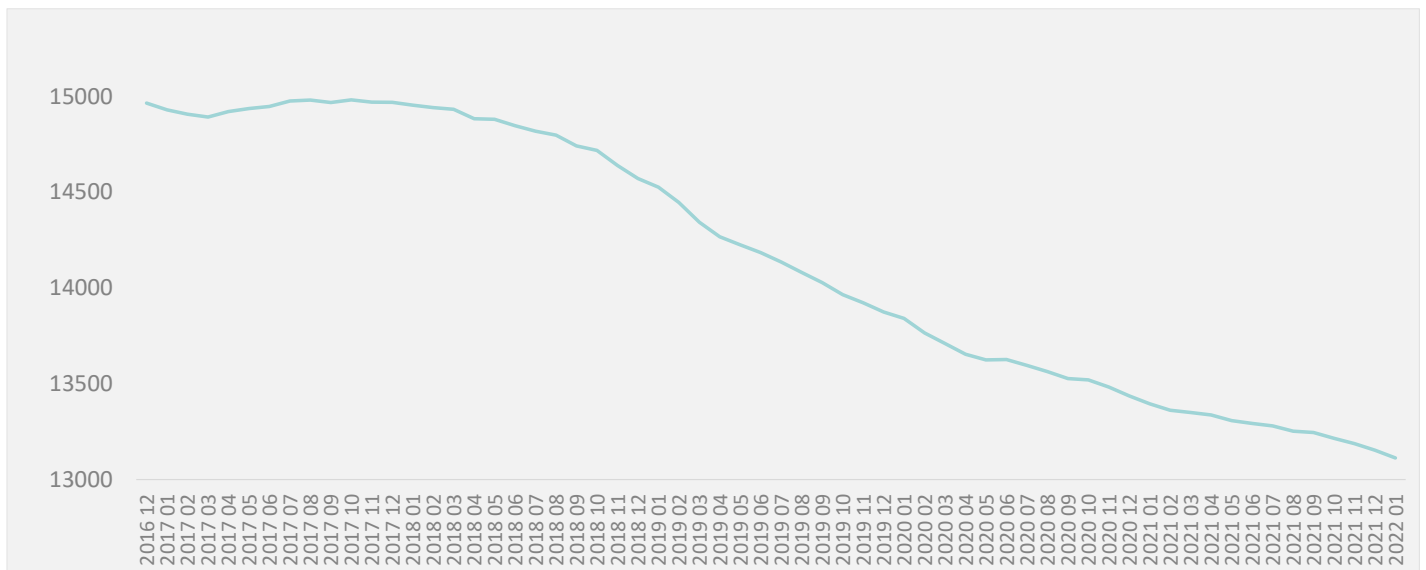
### average pharmacy

	January'22	YTD'2021	December'21		Change		January'21		Change		YTD'2020	Change		
			Value	%	Value	%	Value	%	Value	%	Value	Value	%	
<b>Total turnover (thousand PLN)</b>														
Total open market <sup>1</sup>	278	278	301	-23.5	-7.8%	214	63.5	29.7%	214	63.5	29.7%	64	13.5	21.2%
Rx reimbursed <sup>2</sup>	77	77	91	-13.8	-15.2%	64	13.5	21.2%	64	13.5	21.2%	49	17.9	36.4%
Rx nonreimbursed <sup>3</sup>	67	67	74	-7.0	-9.5%	49	17.9	36.4%	49	17.9	36.4%	99	31.7	32.0%
Non Rx products <sup>4</sup>	131	131	134	-2.9	-2.2%	99	31.7	32.0%	99	31.7	32.0%			
<b>Average price<sup>5</sup> per pack (PLN)</b>														
Total <sup>1</sup>	24.3	24.3	24.6	-0.31	-1.3%	23.5	0.8	3.4%	23.5	0.8	3.4%	29.2	0.7	2.6%
For reimbursed Rx products <sup>2</sup>	29.9	29.9	30.6	-0.6	-2.1%	29.2	0.7	2.6%	29.2	0.7	2.6%	29.8	1.6	5.4%
For nonreimbursed products <sup>3</sup>	31.4	31.4	31.6	-0.2	-0.7%	29.8	1.6	5.4%	29.8	1.6	5.4%	18.4	1.5	8.1%
For Non Rx products <sup>4</sup>	19.9	19.9	19.6	0.2	1.2%	18.4	1.5	8.1%	18.4	1.5	8.1%			
<b>Average mark-up*</b>														
Total <sup>1</sup>	25.5%	25.50%	25.4%	0.1%	0.4%	24.2%	1.3%	5.3%	24.2%	1.3%	5.3%	18.3%	-0.6%	-3.1%
For reimbursed Rx products <sup>2</sup>	18%	17.7%	18.5%	-0.8%	-4.1%	18.3%	-0.6%	-3.1%	18.3%	-0.6%	-3.1%	21.1%	0.6%	2.9%
For nonreimbursed Rx products <sup>3</sup>	22%	21.7%	22.7%	-1.0%	-4.6%	21.1%	0.6%	2.9%	21.1%	0.6%	2.9%	27.3%	1.9%	7.0%
For Non Rx products <sup>4</sup>	29%	29.2%	29.9%	-0.7%	-2.3%	27.3%	1.9%	7.0%	27.3%	1.9%	7.0%			
<b>Number of patients</b>														
Total <sup>1</sup>	4 180	4 180	4 480	-300	-6.7%	3 240	940	29.0%	3 240	940	29.0%	700	110	15.7%
For reimbursed Rx products <sup>2</sup>	810	810	1 050	-240	-22.9%	700	110	15.7%	700	110	15.7%	700	180	25.7%
For nonreimbursed Rx products <sup>3</sup>	880	880	950	-70	-7.4%	700	180	25.7%	700	180	25.7%	2 640	840	31.8%
For Non Rx products <sup>4</sup>	3 480	3 480	3 610	-130	-3.6%	2 640	840	31.8%	2 640	840	31.8%			
<b>Number of pharmacies - summary<sup>#</sup></b>														
	13 113	13 113	13 153	-40	-0.3%	13 395	-242	-1.8%	13 395	-282	-2.1%			

\*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 -



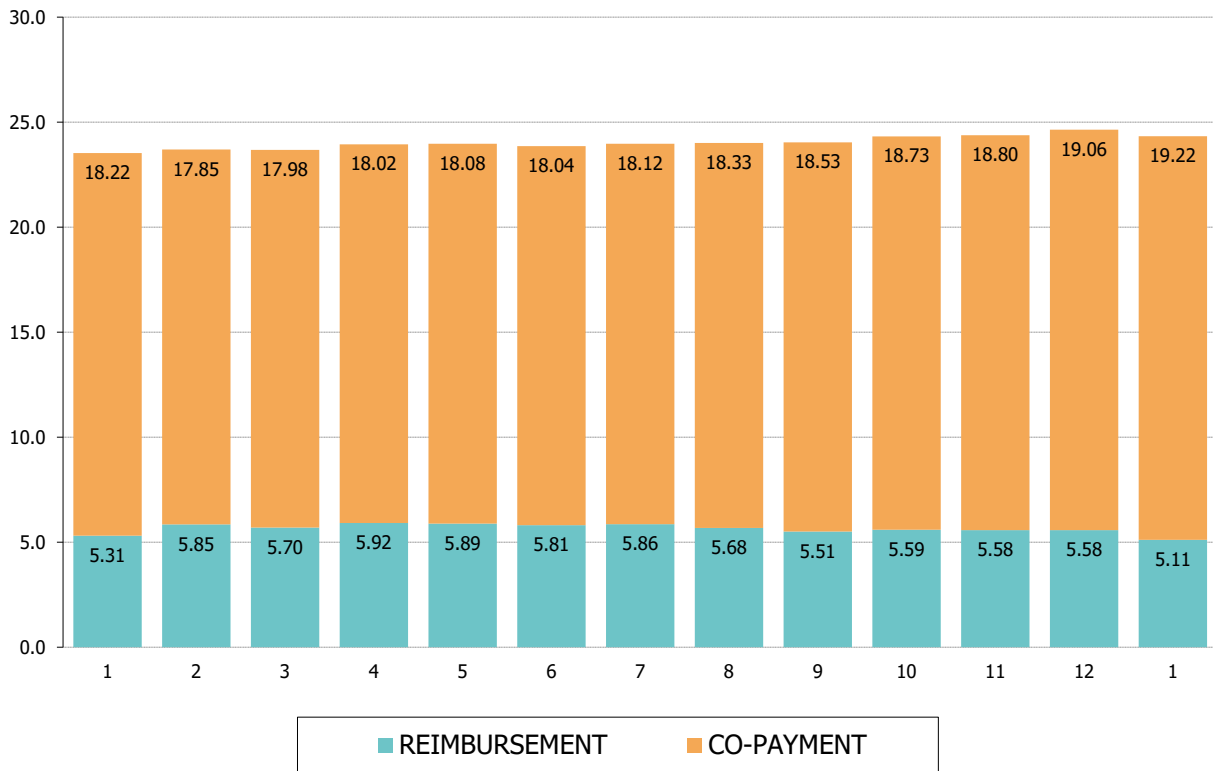
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## Price

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

## PEX PharmaSequence monthly report – January 2022

### PEX PharmaSequence commentary

**The pharmacy market in January 2022** saw sales go close to 3638.9m PLN. Value of sales compared to January 2021 grew by 772.3m PLN (+26.9%). Compared to December of 2021, sales fell by approximately 320.2m PLN (- 8.1%).

**Compared to the same period of 2021** the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 158.8m PLN (+18.6%), sales based on non-reimbursed prescriptions grew by 220.2m PLN (+33.5%), the non-prescription segment grew by 388m PLN (+29.2%).

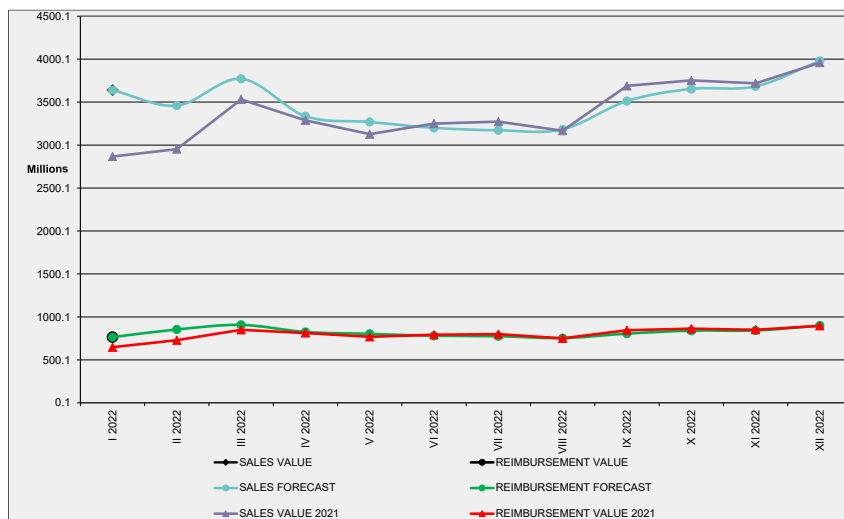
**Compared to the previous month**, the value of tracked segments fell for all monitored segments. Value of reimbursed prescriptions fell by 184.9m PLN (-15.4%), value of non-reimbursed RX drugs fell by 94.7m PLN (- 9.7%) and value of products sold without a prescriptions fell by 43.7m PLN (-2.5%).

**The average retail drug price** in January 2022 was 24.3 PLN and was 1.3% lower than the average price in the previous month, and 3.4% higher than the average price in January 2021. The average retail price of reimbursed prescription was 29.9 PLN (+2.6% vs January 2021), 31.4 PLN for non-reimbursed prescriptions (+5.4% vs January 2021) and 19.9 PLN for products sold without a prescription (+8.1% vs January 2021).

**Average pharmacy margin** for all drugs in January 2022 was 25.5% and was higher by 5.3% than margin in the same period of 2021. Compared to December 2021, the average pharmacy margin was higher by 0.4%.

**Drug reimbursement by the National Health Fund** in January was in the amount 765m PLN, 18.1% more than in the same period of 2021. The level of patient copayment for reimbursed drugs in January was 21%, fell by 1.6p.p. compared to previous month.

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

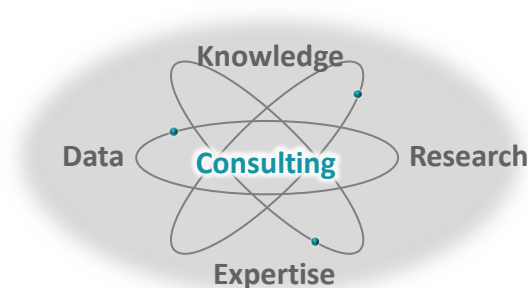


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### About us

**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 24th of February 2022, prepared by Elżbieta Brzeźny, Analyst based on PEX PharmaSequence data.

