

EXECUTIVE SUMMARY

2024-Q2

- 1,647.2 mn Eur, PPP*, 12.2% Sales Growth
- 170.3 mn units, -3.4% Volume Growth
- 2,618.3 mn DOT, -1.6% DOT Growth

YTD (2024-Q2)

- 3,284.8 mn Eur, PPP*, 13.2% Sales Growth
- 350.5 mn units, -3.1% Volume Growth
- 5,330.2 mn DOT, -0.6% DOT Growth

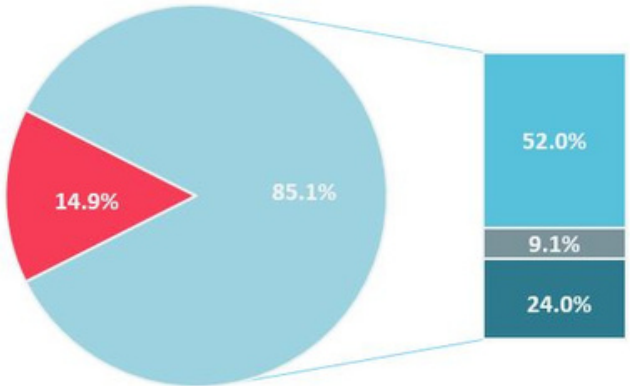
MAT (2024-Q2)

- 6,439.0 mn Eur, PPP*, 14.0% Sales Growth
- 711.3 mn units, -1.1% Volume Growth
- 10,754.2 mn DOT, 2.5% DOT Growth

*PPP-Pharmacy Purchase Price

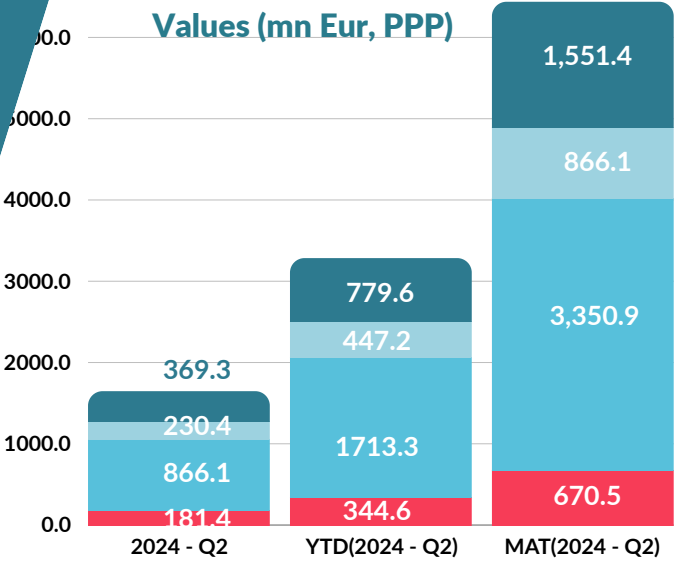


MARKET SPLIT BY CHANNEL AND STATUS - MAT (2024-Q2), PPP, EUR

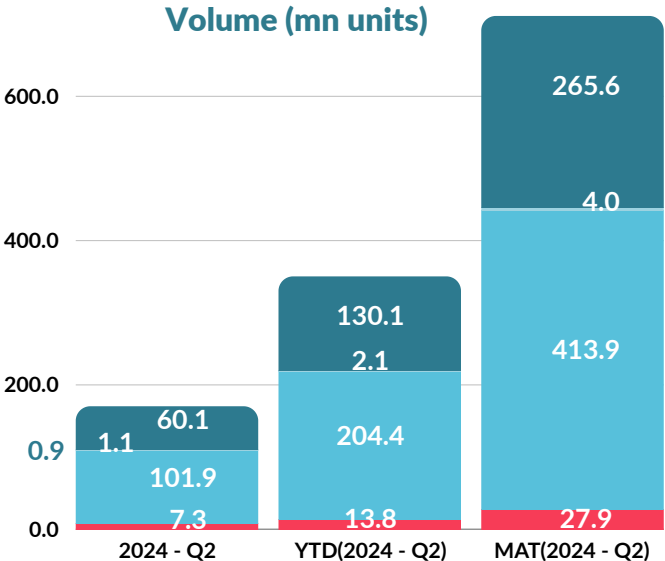


Hospital drugs Retail Rx w/o CV, CVR drugs Retail CV, CVR drugs Retail OTC drugs & FS

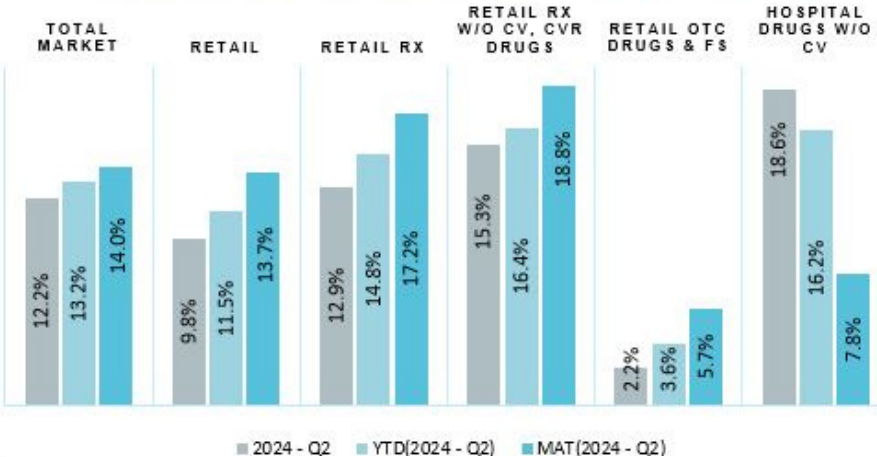
Hospital drugs w/o CV
Retail Rx drugs w/o CV, CVR
CV, CVR drugs
OTC drugs & FS



Hospital drugs w/o CV
Retail Rx drugs w/o CV, CVR
CV, CVR drugs
OTC drugs & FS



MARKET GROWTH BY CHANNEL AND STATUS - PPP, EUR



April-June 2024

EXECUTIVE SUMMARY

Total market
6.44 bn Eur

Top 20 drugs &
CV, CVR
1.73 bn Eur

CV&CVR
0.87 bn Eur

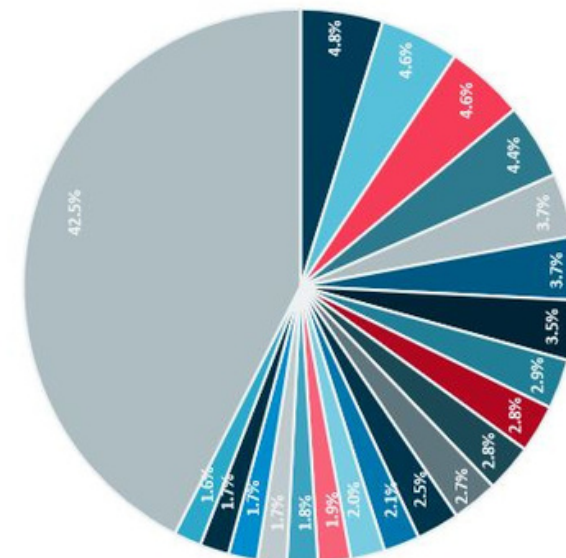
TOP 20 BRANDS

Top 20 brands PRODUCT NAME		Values PPP 2024 - Q2 EUR, mn	Values PPP 2024 - Q2 +/- %	Values PPP YTD(2024 - Q2) EUR, mn	Values PPP YTD(2024 - Q2) +/- %	Values PPP MAT(2024 - Q2) EUR, mn	Values PPP MAT(2024 - Q2) +/- %
Total market		1,647.2	12.2%	3,284.8	13.2%	6,439.0	14.0%
Top 20 Rx and OTC drugs		230.3	22.7%	450.7	24.5%	868.7	28.1%
1	NUROFEN	20.3	6.3%	43.8	10.4%	86.7	15.0%
2	IMBRUVICA	17.9	8.7%	35.8	12.3%	70.9	13.2%
3	DARZALEX	17.1	48.1%	32.7	62.5%	61.5	82.0%
4	TAGRISSO	14.3	36.8%	27.6	37.4%	51.6	39.1%
5	RYBELSUS	15.0	92.7%	26.4	97.1%	46.3	151.7%
6	FORXIGA	12.8	52.3%	24.3	55.2%	44.3	55.1%
7	IBRANCE	10.9	3.1%	21.5	5.8%	42.6	7.2%
8	DETRALEX	10.3	21.0%	19.8	17.5%	40.4	17.5%
9	OZEMPIC	8.8	-11.9%	19.0	0.9%	40.3	15.0%
10	CLEXANE	12.1	70.9%	21.7	57.3%	39.9	49.0%
11	ASPENTER	10.0	13.1%	20.0	18.5%	39.5	18.0%
12	TRULICITY	9.7	-4.2%	19.5	-6.6%	39.3	-6.7%
13	VESSEL DUE F	9.7	4.4%	19.0	8.5%	37.7	9.5%
14	PHEGO	10.7	30.3%	19.9	27.2%	37.1	41.3%
15	XIGDUO	9.1	29.2%	18.0	34.9%	34.2	44.0%
16	TRESIBA	8.9	19.7%	17.2	16.5%	33.1	17.8%
17	SORTIS	8.1	11.2%	16.8	15.7%	33.0	21.4%
18	VENCLYXTO	8.3	18.0%	16.0	15.9%	30.9	23.9%
19	SPINRAZA	7.3	-8.0%	15.0	-7.5%	30.1	-11.1%
20	OYAVAS	9.0	98.2%	16.6	110.6%	29.3	138.8%
CVR drugs		10.5	-65.7%	25.2	-50.6%	77.1	-32.9%
CV drugs		219.9	27.4%	422.0	28.0%	789.2	27.0%

TOP 20 CORPORATIONS

Crt. No.	CORPORATION	Values PPP 2024 - Q2 EUR, mn	Values PPP 2024 - Q2 +/- %	Values PPP YTD(2024 - Q2) EUR, mn	Values PPP YTD(2024 - Q2) +/- %	Values PPP MAT(2024 - Q2) EUR, mn	Values PPP MAT(2024 - Q2) +/- %
		EUR, mn	+/- %	EUR, mn	+/- %	EUR, mn	+/- %
Total		1,647.2	12.2%	3,284.8	13.2%	6,439.0	14.0%
1	ASTRAZENECA	85.3	34.3%	164.8	36.5%	307.9	38.5%
2	SANOFI	75.4	11.1%	147.8	10.3%	298.3	10.2%
3	SUN PHARMA ¹	73.4	6.6%	148.5	9.6%	297.3	17.4%
4	ZENTIVA ²	72.8	22.6%	144.8	22.2%	282.9	19.7%
5	JOHNSON & JOHNSON	62.6	18.8%	122.6	22.6%	237.9	23.8%
6	SERVIER ³	60.6	13.4%	119.4	13.3%	235.4	15.0%
7	PFIZER	57.9	3.4%	113.8	4.9%	223.6	4.4%
8	NOVARTIS	50.4	21.4%	97.5	21.4%	187.0	19.0%
9	HOFFMANN LA ROCHE	49.9	21.2%	97.1	18.5%	182.1	11.4%
10	NOVO NORDISK	49.8	32.0%	95.5	33.2%	180.6	39.5%
11	VIATRIS	42.5	12.6%	85.9	14.8%	174.8	16.5%
12	MERCK & CO	45.4	35.6%	86.5	32.6%	159.7	24.0%
13	BAYER AG	35.2	2.5%	69.6	3.7%	138.2	5.0%
14	ELI LILLY	34.9	22.0%	66.6	17.5%	127.1	14.7%
15	ABBVIE	26.6	-19.4%	57.5	5.4%	120.8	8.1%
16	MENARINI	29.4	7.2%	58.6	8.8%	118.6	12.5%
17	SANDOZ	28.9	4.5%	58.1	5.3%	110.7	2.1%
18	GLAXOSMITHKLINE	27.7	20.2%	54.6	15.7%	108.2	11.0%
19	BRISTOL MYERS SQUIBB	29.1	18.7%	55.8	13.2%	106.7	6.1%
20	KRKA D.D.	25.3	3.9%	50.8	6.0%	104.1	15.0%
All others		684.3	8.3%	1,389.2	9.1%	2,737.0	10.9%

- ASTRAZENECA
- SANOFI
- SUN PHARMA¹
- ZENTIVA²
- JOHNSON & JOHNSON
- SERVIER³
- PFIZER
- NOVARTIS
- HOFFMANN LA ROCHE
- NOVO NORDISK
- VIATRIS
- MERCK & CO
- BAYER AG
- ELI LILLY
- ABBVIE
- MENARINI
- SANDOZ
- GLAXOSMITHKLINE
- BRISTOL MYERS SQUIBB
- KRKA D.D.
- All others



Data refer to medicines dispensed to patients in retail and hospital pharmacies, acc. to Cegedim Pharma & Hospital Report, Q2 2024

¹ including Terapia
² including AlvoGen and Labomed
³ including Egis