Romania
Pharma Market Overview

November YTD 2020

Table of contents

Methodology

- Romania Market Overview is build on Sell-In data, using as measures units and sales value in EUR, at wholesaler price.
- Data is collected electronically from Wholesalers and Pharmaco's and is published using a cumulative, un-projected methodology.

- Romania Market Overview is built on full market data, including Rx (prescription bound registered medicines), OTC (non Rx bound registered medicines) and para-pharmaceuticals (food supplements, personal care products, patients care and nutrition).

- Pharmacy landscape takes into consideration the entire universe of retail pharmacies and health stores.
- Non Rx bound registered medicines are structured in OTC classes and are presented below.

01 COUGH COLD&OTH RESP PROD	**17** HABIT TREATMENT	**56** TEST & MEASURING INSTRUME
02 PAIN RELIEF	**18** MISCELLANEOUS	**57** MEDICAL/SURGICAL AIDS
03 DIGEST & OTH INTEST PROD	**30** ENTERAL NUTRITIONAL PROD.	**64** CONTACT CARE
04 VITAM.MINER.&NUTRIT.SUPPL	**35** BABY FOODS	**66** CONTRACEPTION
05 TONICS & OTHER STIMULANTS	**36** FOOD FOR ADULTS	**70** HOUSEHOLD DISINFECTANS ET
06 SKIN TREATMENT	**37** CONFECTIONERY	**81** BEAUTY PRODUCTS FOR MEN
07 EYE CARE	**38** SWEETENERS	**82** BEAUTY PRODUCTS FOR WOMEN
08 EAR CARE	**39** OTHER NUTRITIONAL PRODUCT	**83** UNISEX BEAUTY PRODUCTS
09 MOUTH TREAT.PRODUCTS	**40** TRADITIONAL DRESSINGS	**85** PERSONAL HYGIENE
10 CIRCULATORY PRODUCTS	**41** SUTGICAL ABSORBENTS	**86** HAIR PRODUCTS
11 ANTINAUSEAN.	**46** WOUND CARE	**87** ORAL HYGIENE
12 URINARY&REPRODUCTIVE CARE	**47** ADVANCED DRESSINGS	**88** BABY HYGIENE & CARE
13 CALM.SLEEP.&MOOD ENHAN.PR	**49** PLASTERS	**93** ORAL HYGIENE & CARE ACCE
14 WEIGHT LOSS PRODUCTS	**55** INJECTION DEVICES	**97** ALL OTHER MISCELLANEOUS P

Romanian Market Evolution

The total pharma market value reached 4.08 bEUR at YTD 11 2020 driven mainly by Retail OTC and Hospital Rx

Romania market – overview [YTD 11 2020 vs YTD 11 2019]

4,076 mEUR

Total Pharma market, with growth of **3,1% in value**, and **1,5% in units**

2,973 mEUR

Rx market, with growth
-1,0% value (1,3% w/o cv)
-3,3% units (-3,6% w/o cv)*

1,103 mEUR

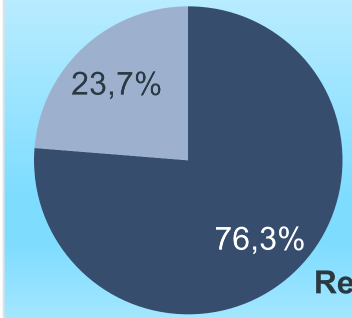
OTC market, with growth
15,7% in value and
9,5% in units

12 bEUR
Healthcare funds (MoH & CNAS)
~5,0% GDP
allocated to healthcare

Hospital
+15,9% value, -12,2% units
Retail
+0,8% values, +2,2% units

Key growth drivers **
OTC (123,7% in value and 243,5% in units)
ATC L0 (97,9% in value and -1,8% in units)
ATC A0 (22,0% in value and -37,5% in units)

~ 2,231 mEUR Innovative market

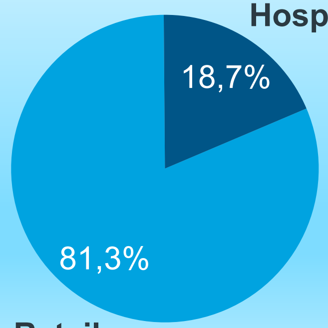


Hospital
+ 20,0% value
+ 6,9% units

Retail
- 8,3% value
- 1,5% units

Overall Market
-2,8% value
-1,1% units

~ 742 mEUR Generics market



Hospital
+ 3,2% value
-19,8% units

Retail
+ 5,7% value
- 3,4% units

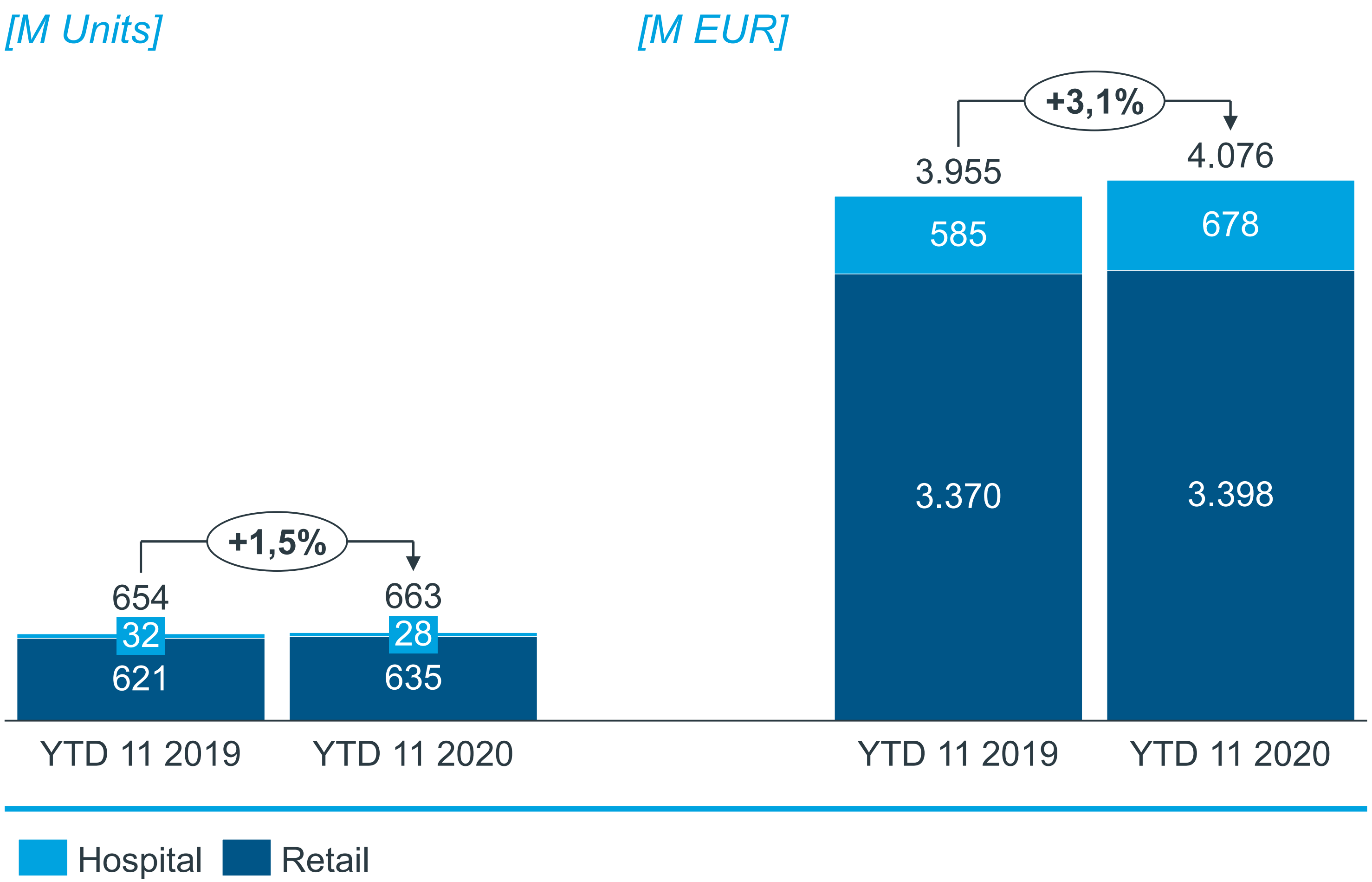
Overall Market
+ 5,2% value
- 4,9% units

* Cost volume YTD 11 2019 : Avastin, Brilique, Caprelsa, Cymraza, Exviera, Farydak, Giotrif, Harvoni, Inlyta, Iressa, Jevtana, Keytruda, Lemtrada, Mekinist, Opdivo, Revolade, Stelara, Tafinlar, Tyverb, Viekirax, Votrient, Xalkori, Xtandi, Yervoy, Zelboraf, Zepatier, Zytiga
* Cost volume YTD 2020: Alecensa, Alofisel, Avastin, Brilique, Brineura, Briviact, Cabometyx, Caprelsa, Crysvita, Cymraza, Eliquis, Entresto, Exviera, Eylea, Gilenya, Giotrif, Harvoni, Inlyta, Iressa, Jevtana, Keytruda, Kisqali, Lamzede, Mekinist, Ocrevus, Opdivo, Praluent, Revolade, Rydapt, Saflutan, Tafinlar, Tyverb, Viekirax, Vosevi, Votrient, Xalcori, Xarelto, Xtandi, Yervoy, Zelboraf, Zytiga
** Key growth drivers may account for more than 100%, due to the decrease in other ATCs (ATC J0, G0, R0)

IQVIA

Positive yet fragile market evolution on Year to Date, with an important growth in Hospital channel

Market size and dynamics by channel [YTD 11 2020 vs YTD 11 2019]



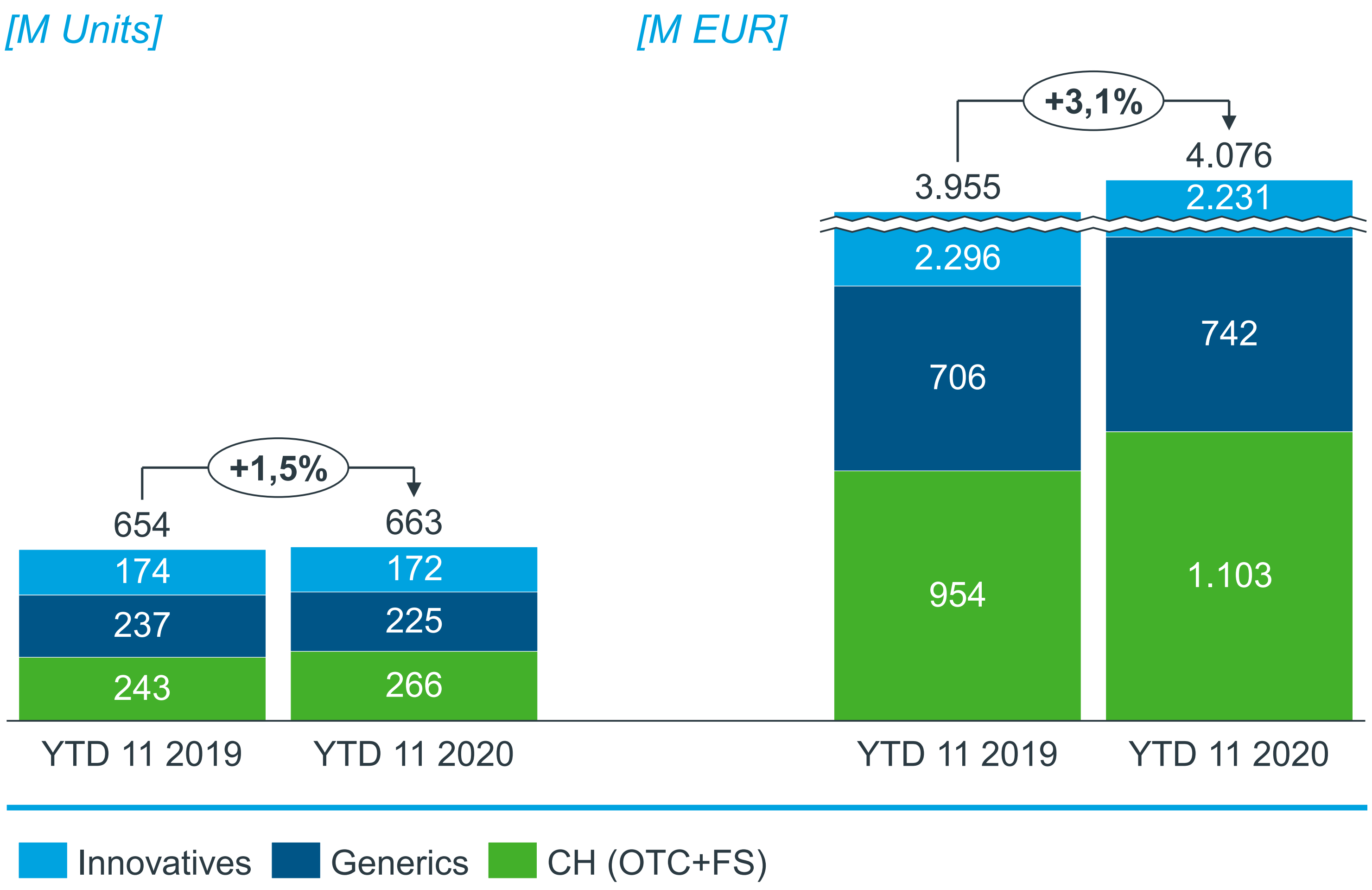
Comments

- Hospital channel registered the highest value growth, +15,9% vs similar period last year, influenced by expensive acquisitions during the year
- Retail channel had a flat evolution in value (+0,8%) and slight increase in units (+2,2%)

IQVIA

Consume Health products uptake balanced the drop in innovative segment, which led to a positive result on YTD 11 2020

Market size and dynamics by segment [YTD 11 2020 vs YTD 11 2019]



Comments

- CH segment grew 15,7% in value and 9,5% in volume, mostly sustained by the retail channel
- The positive results of CH and Generics segments were tempered by the -2,8% underperformance in value of innovative segment, which led to the overall +3,1% market growth

Top 20 Products

Top 10 products shows high dynamics incurred by new molecules approved in last 2 years & HCV program restart delay

Top 10 Products [YTD 11 2020 vs YTD 11 2019 | MEUR]

PERIOD	HARVONI	OPDIVO	NUROFEN	KEYTRUDA	ELIQUIS	IMBRUVICA	HUMIRA	TRULICITY	IBRANCE	SPINRAZA
YTD 11 2020	87,1	71,8	68,1	52,4	51,9	43,5	33,6	30,5	30,1	28,3
Rank YTD 11 2020	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
YTD 11 2019	154,4	49,1	62,8	21,5	39,1	34,8	47,4	20,4	16,0	13,4
Rank YTD 11 2019	**1**	**5**	**3**	**13**	**7**	**8**	**6**	**15**	**29**	**43**

IQVIA

Good performance for Parasinus, reaching 12th place, up by 14 positions

Top 11-20 Products [YTD 11 2020 vs YTD 11 2019 | MEUR]

PERIOD	LANTUS	PARASINUS	ASPENTER	DETRALEX	VESSEL DUE F	ENBREL	PRADAXA	MEKINIST	ISENTRESS	ATACAND
YTD 11 2020	27,6	25,8	24,6	24,5	23,1	21,5	21,0	20,9	20,3	19,6
Rank YTD 11 2020	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
YTD 11 2019	29,0	16,7	21,2	24,3	20,3	23,6	22,0	16,2	19,6	20,2
Rank YTD 11 2019	**9**	**26**	**14**	**10**	**16**	**11**	**12**	**29**	**18**	**17**

Top 20 Manufacturers

Top 10 manufacturers changes are mostly impacted by HCV program delays

Top 10 Manufacturers [YTD 11 2020 vs YTD 11 2019 | MEUR]

PERIOD	SANOFI	PFIZER	AZN	NOVARTIS	TERAPIA	SERVIER	MSD	JANSSEN	BAYER	GILEAD SCIENCE
YTD 11 2020	179,3	154,8	151,0	139,4	139,0	131,0	130,2	112,5	105,3	99,3
Rank YTD 11 2020	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
YTD 11 2019	167,9	128,1	140,8	121,5	130,7	124,5	195,1	99,8	92,8	160,6
Rank YTD 11 2019	**2**	**7**	**4**	**9**	**6**	**8**	**1**	**10**	**11**	**3**

Mylan and GSK CH each gain 5 positions, landing on 15th and 16th places

Top 11-20 Manufacturers [YTD 11 2020 vs YTD 11 2019 | MEUR]

PERIOD	BMS	ANTIBIOTICE	RECKITT BENCKISER	ELI LILLY	MYLAN	GSK CH	SANDOZ	BERLIN-CH/ MENARINI	KRKA	ABBVIE
YTD 11 2020	95,9	88,3	86,3	79,3	78,2	77,8	77,0	76,7	72,0	67,9
Rank YTD 11 2020	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**
YTD 11 2019	86,5	86,2	79,3	69,2	65,7	63,9	78,3	78,1	73,3	133,9
Rank YTD 11 2019	**12**	**13**	**14**	**18**	**20**	**21**	**15**	**16**	**17**	**5**

Top 10 Corporations

Sanofi reached 1st place, with a 14,6% value growth vs previous year

Top 10 Corporations [YTD 11 2020 vs YTD 11 2019 | MEUR]

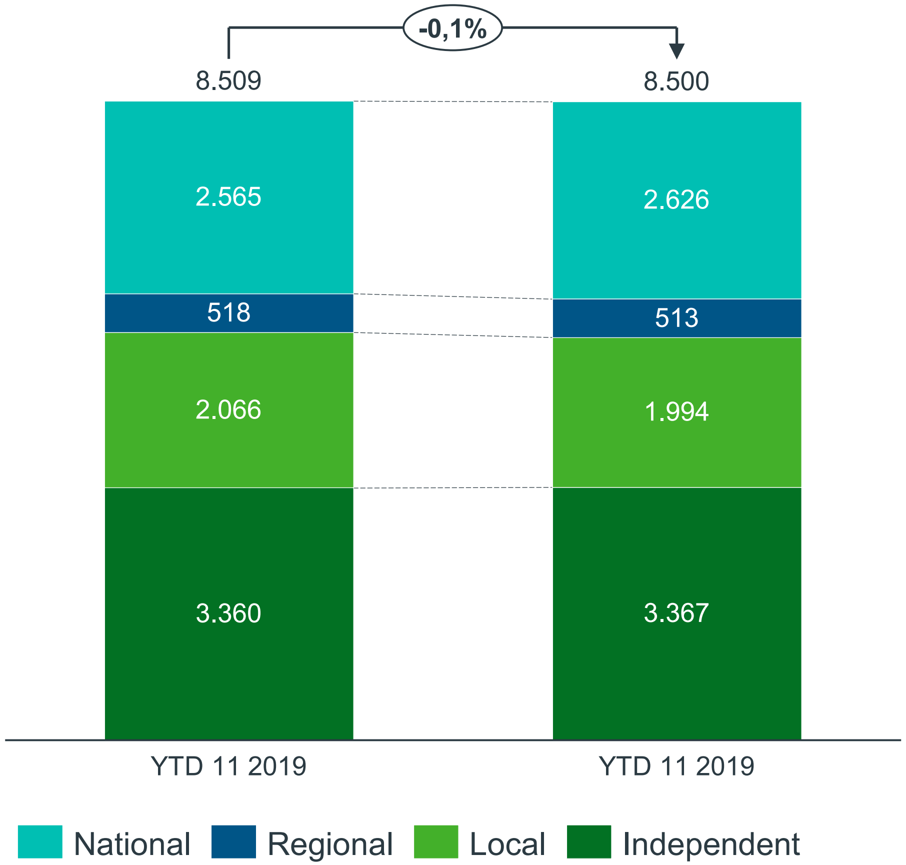
PERIOD	SANOFI	NOVARTIS	PFIZER	ZENTIVA	SERVIER	SUN PHARMA	AZN	MSD	GSK	J&J
YTD 11 2020	238,6	216,4	179,3	177,5	159,0	151,8	151,0	150,6	149,0	144,7
Rank YTD 11 2020	1	2	3	4	5	6	7	8	9	10
YTD 11 2019	208,1	199,8	155,4	150,8	151,5	143,5	140,8	220,1	160,1	133,3
Rank YTD 11 2019	2	3	6	8	7	9	10	1	5	12

Pharmacy Landscape

The Romanian pharmacy landscape remained constant overall, National Chains continued their steady consolidation

Pharmacy landscape overview [YTD 11 2020 vs YTD 11 2019]

Number of Pharmacies*



Comments

- Retail market continues to consolidate, local and regional chains decreasing in number, in favor of national chains. New independent pharmacies starting to be active.

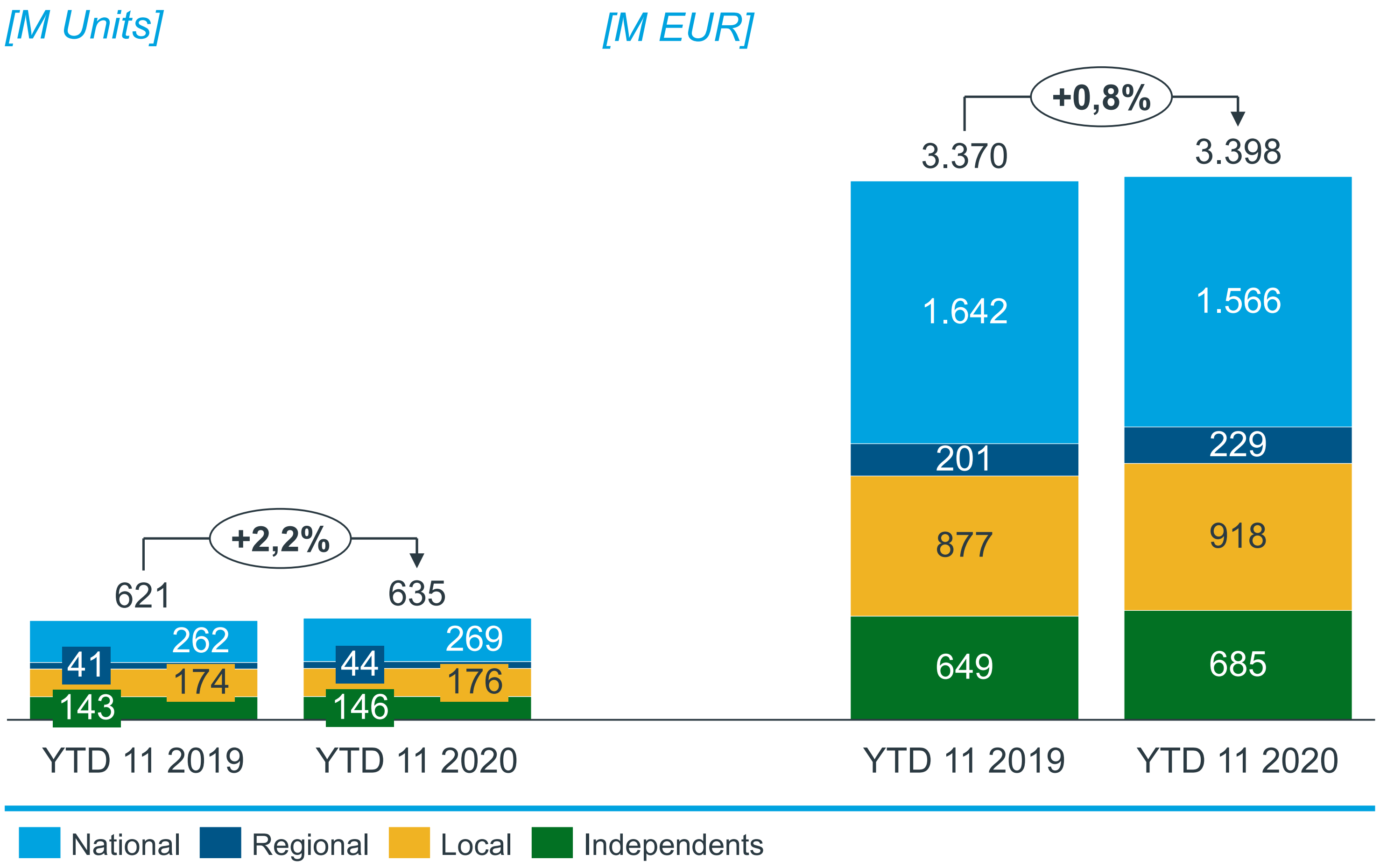
PCYs share by chain type [YTD 11 2020]

Pharmacy chain type	# of outlets	PPG [%]	Market share
National	2,626	2.4%	30.9%
Regional	513	-1.0%	6.0%
Local	1,994	-3.5%	23.5%
Independent	3,367	0.2%	39.6%
Total	**8,500**	**-0.1%**	**100 %**

Note: Pharmacies, not including health stores
Source: IQVIA Sell-In

National pharmacy chains registers lower sales compared with previous period, due to quarantine and lock down measures

Market size and dynamics by chain type [YTD 11 2020 vs YTD 11 2019]



Comments

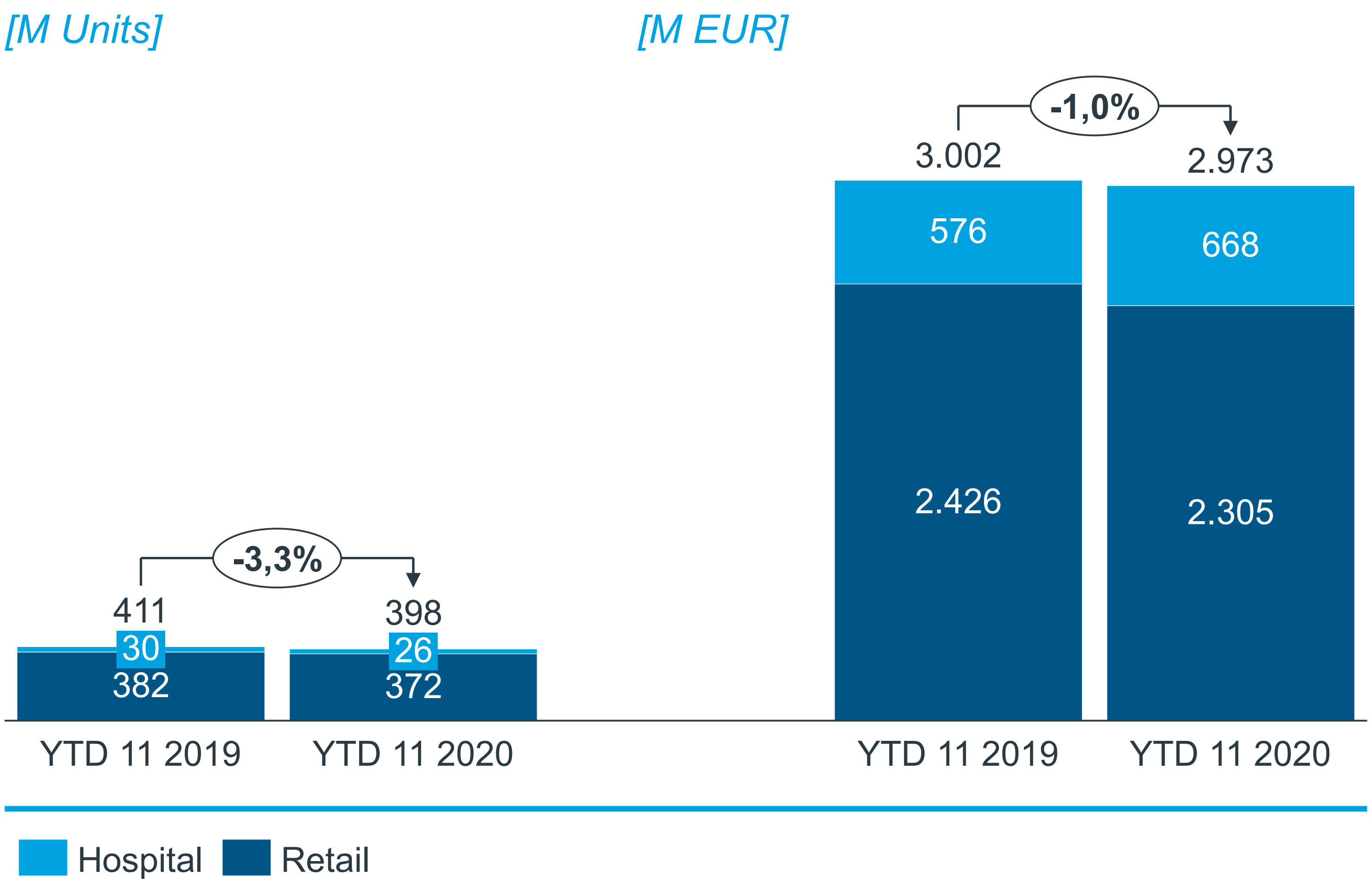
- National Chains registered a drop in value, -4,6% vs previous period
- Growth for all other pharmacy segments (13,9% for Regional, 4,7% for Local and 5,5% for independents)
- From volume perspective all pharmacies segments registered positive results, reaching an overall 2,2% growth

Market definition: Sales in Pharmacies (not including health stores) of Innovative, Generics and CH (OTC + FS)
Source: IQVIA Sell-In, WHS Price Euro

Rx Market

For the first time in more than 5 years, Rx market post a negative result after 11 months

Market size and dynamics by channel [YTD 11 2020 vs YTD 11 2019]

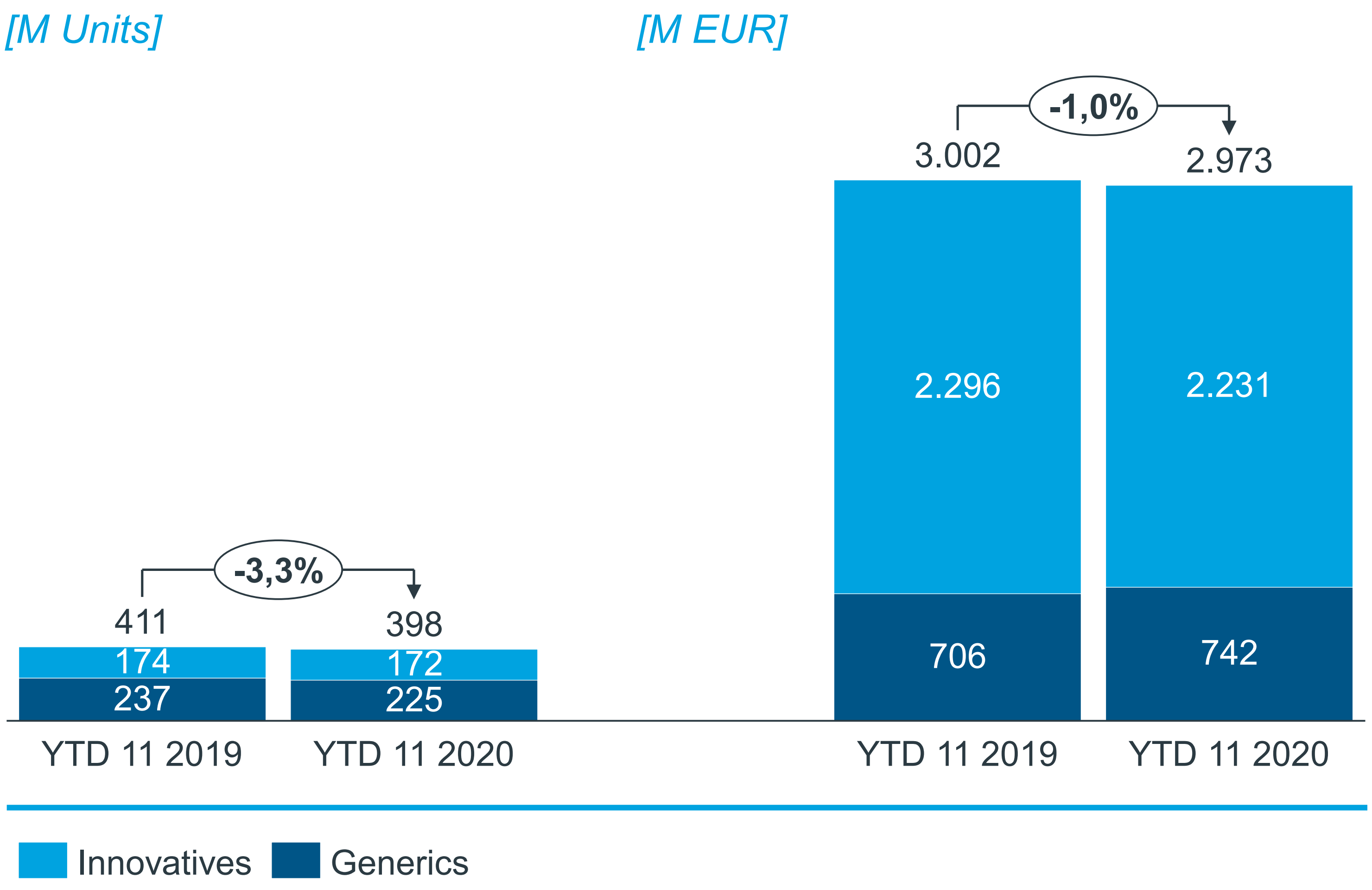


Comments

- The growth in Hospital channel (+16,1%) did not succeed to offset the drop in retail channel, leading to an overall -1,0% in value and -3,3% in volume
- Retail channel registered a drop on Year to date, -5,0% in value and -2,6% in volume

Generics uptake did not entirely succeed in balancing the drop in innovative segment

Market size and dynamics by segment [YTD 11 2020 vs YTD 11 2019]



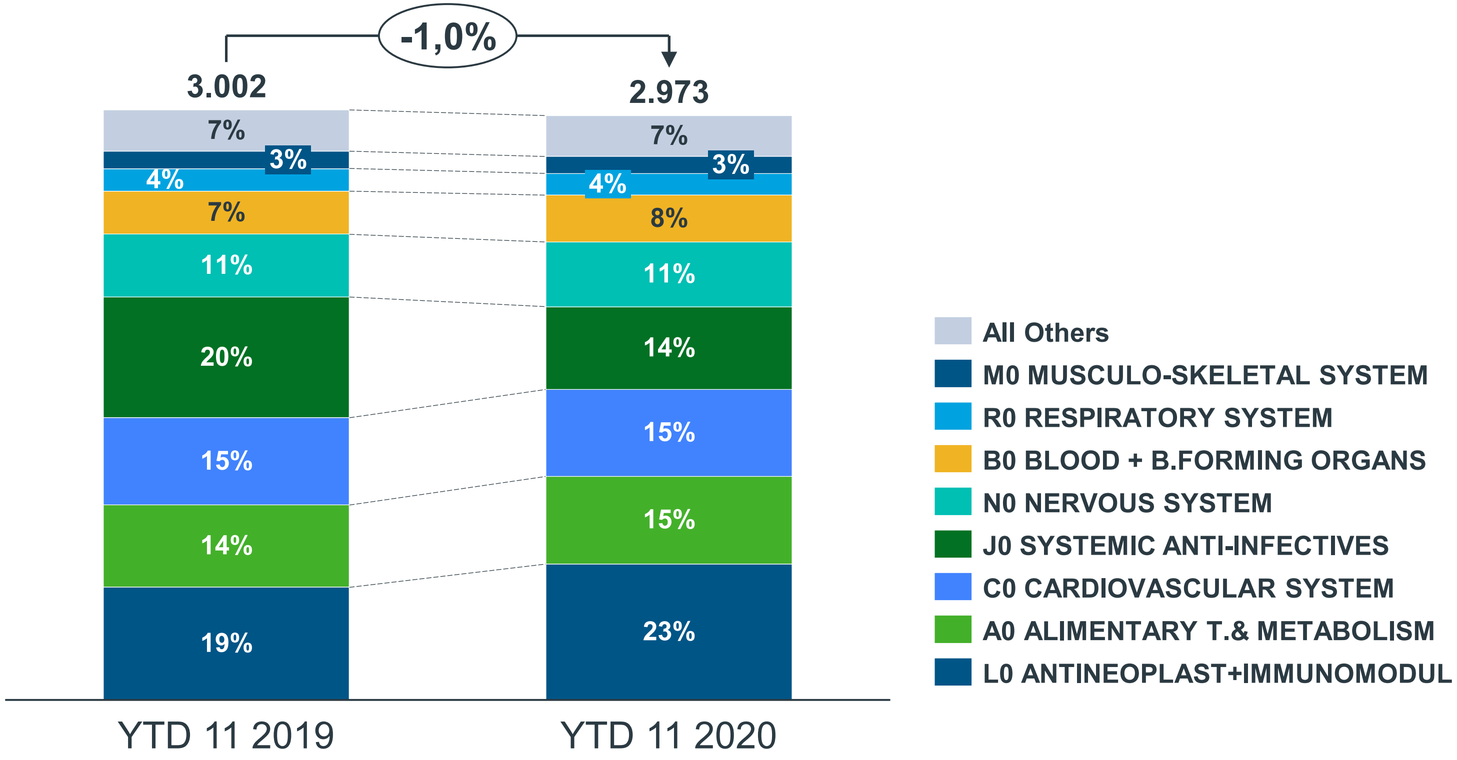
Comments

- The positive result of Generics segment (5,2%) was eroded by the -2,8% underperformance in value of innovative segment, which led to the overall -1% result.
- Drop on both segments in volume -1,1% on Innovative and -4,9% on Generics

L class continues to dominate the overall market, reaching a weight of 23% of the total Rx dispensing

Market size and dynamics by ATC1 classes [YTD 11 2020 vs YTD 11 2019]

Share of therapy value in total RX spending [MEUR]



Comments

- Mixed performances of ATC classes in 2020
- L and A classes registered the highest increase in value compared to previous period (+20,6% and 6,3% respectively)
- The drop in J class (-31,5%) is the main reason of the overall -1,0% result in value.

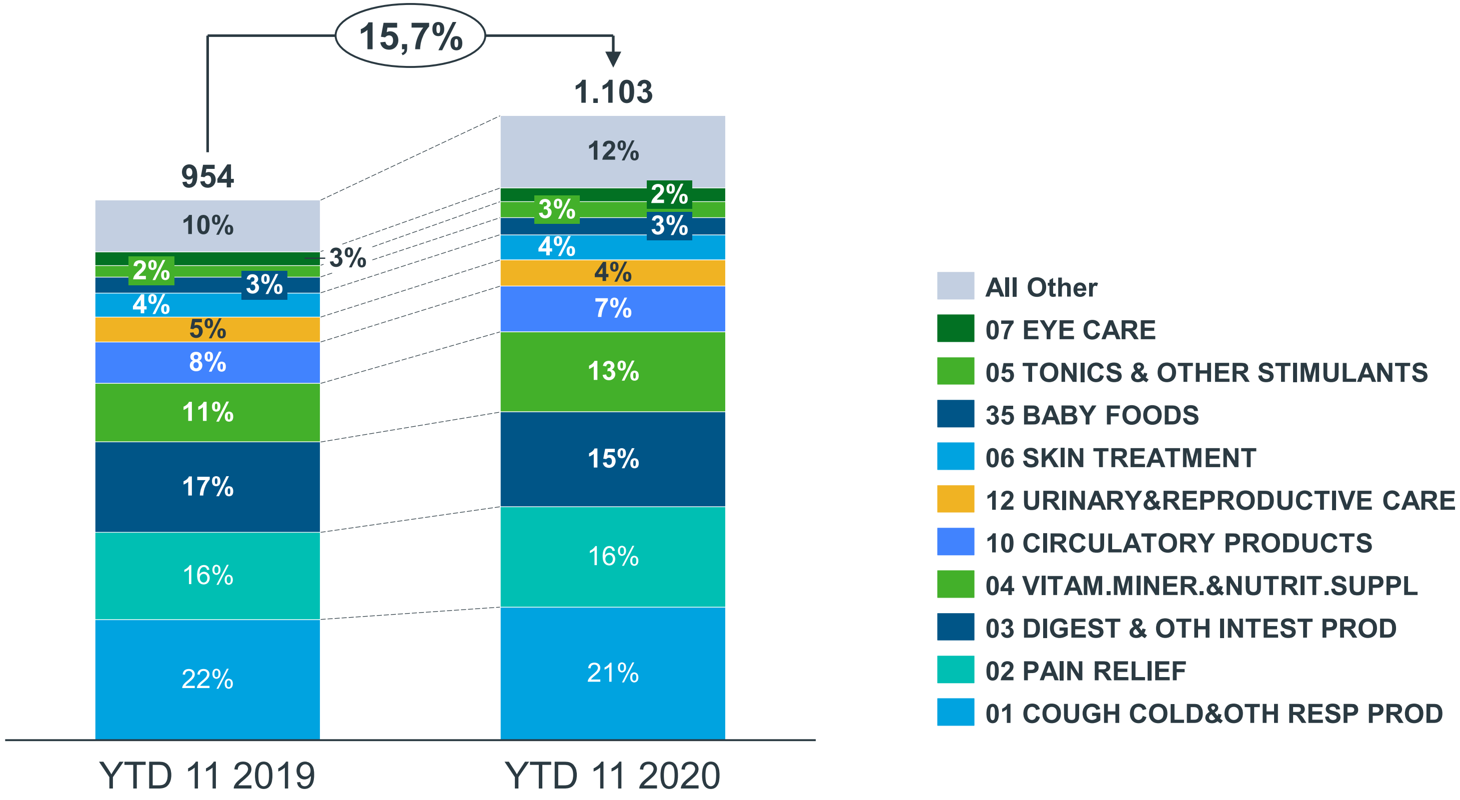
Source: IQVIA Sell-In, WHS Price Euro

OTC Market

Consumer Health segment registered a growth of 15,7% in value vs YTD 11 2019

Market size and dynamics by OTC1 classes [YTD 11 2020 vs YTD 11 2019]

Share of therapy value in total CH spending [MEUR]



Comments

- Class 04 Vitamins and Minerals registered the highest growth in value vs previous period (+37,0%), followed by Class 01 Cough Cold & Other Respiratory Products (+10,5%), and Class 02 Pain Relief (+15,4%)

Source: IQVIA Sell-In CH, WHS Price Euro

Please Contact Us for More Information

Florentina MORARU
Client Service Specialist

florentina.moraru@iqvia.com
+40 21 620 57 30
+40 72 625 31 80

Cristian RADULESCU
Associate Director Offering

cristian.radulescu@iqvia.com
+40 21 620 57 30
+40 73 071 35 05