



MONTHLY REPORT - JUNE 2026

Warsaw, July 2026

TOTAL OPEN MARKET (SELL-OUT REPORT)

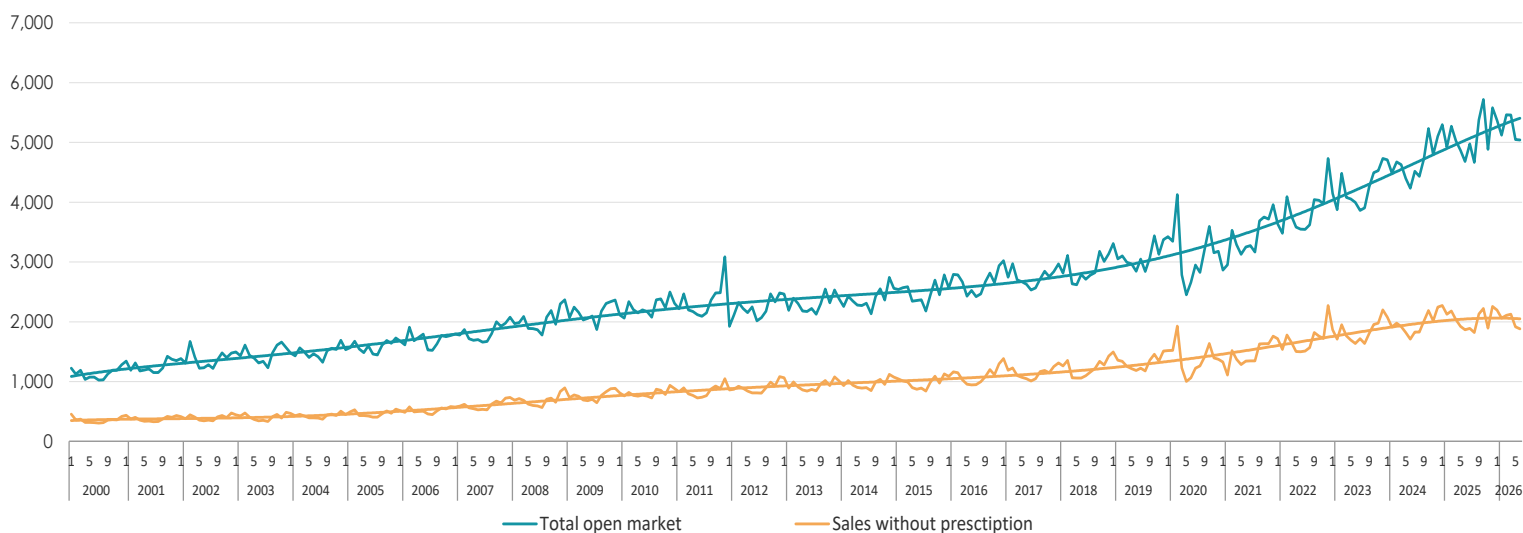
	JUNE 2026	CHANGE IN COMPARISON TO			CUMULATIVE YTD	
		MAY 2026	JANUARY 2026	JUNE 2025	2026	CHANGE VS 2025
TOTAL TURNOVER (PLN MILLION)						
Total open market ¹	5,043	-0.1%	-6.1%	7.7%	31,509	4.8%
Rx reimbursed ²	1,524	0.4%	-1.5%	8.1%	9,339	7.3%
Rx nonreimbursed ³	1,583	1.1%	0.4%	16.4%	9,570	10.4%
Non Rx products ⁴	1,884	-1.6%	-14.2%	1.0%	12,287	-0.9%
REIMBURSEMENT						
Reimbursement value (PLN million)	1,312	0.5%	-2.0%	5.6%	8,099	6.3%
Reimbursement share In total turnover	26.0%	0.6%	4.4%	-1.9%	25.7%	2.1%
Reimbursement share In reimbursed sales	84.4%	0.1%	-0.5%	-2.3%	85.0%	-0.8%
AVERAGE PRICE PER PACK (PLN)						
Total ¹	35.96	0.2%	4.2%	6.3%	35.31	4.4%
For reimbursed Rx products ²	37.66	0.1%	0.9%	2.4%	37.63	2.3%
For nonreimbursed Rx products ³	51.71	1.8%	7.1%	11.6%	49.60	7.0%
For Non Rx products ⁴	27.40	-1.3%	1.0%	4.0%	27.42	4.1%
AVERAGE MARK-UP						
Total ¹	28.4%	-2.0%	8.1%	7.2%	27.2%	3.5%
For reimbursed Rx products ²	18.7%	-5.1%	0.4%	-7.1%	18.8%	-5.6%
For nonreimbursed Rx products ³	23.7%	19.6%	7.6%	8.8%	22.2%	3.5%
For Non Rx products ⁴	34.9%	-10.2%	7.8%	9.1%	34.4%	6.0%
AVERAGE PHARMACY						
Number of patients in pharmacies	4,060	-4.9%	-9.2%	-2.9%	26,440	-2.9%
Total turnover (PLN thousand) ¹	415	-0.1%	-5.6%	9.4%	2,589	6.4%

TOTAL PHARMACY TURNOVER CUMULATIVE IN PLN MILLION

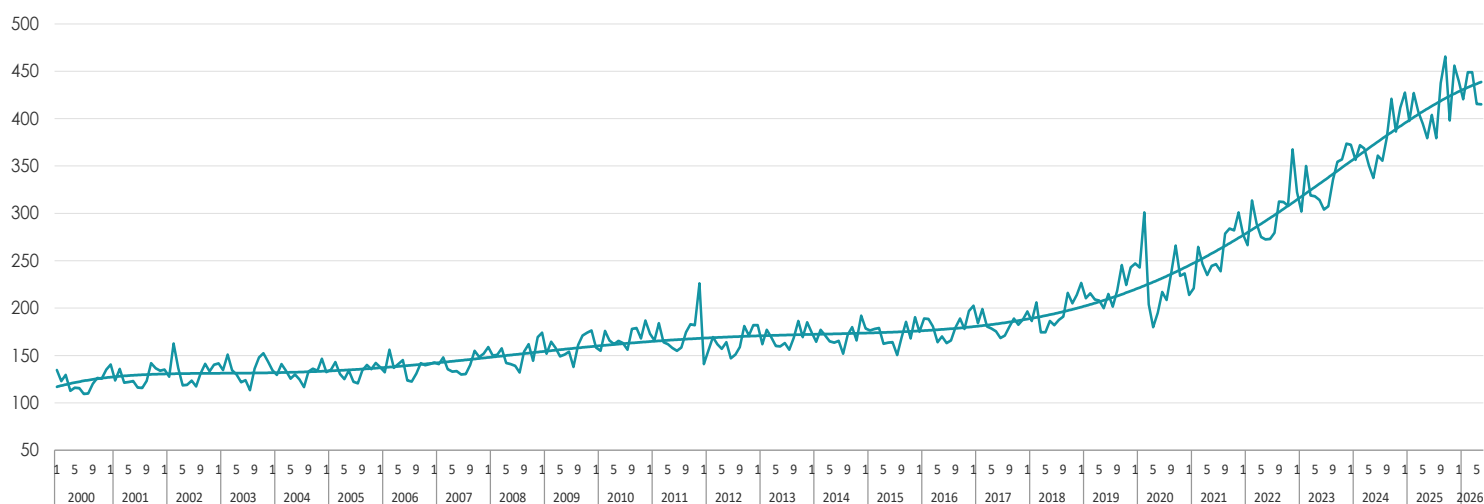
2026	PHARMACY MARKET TOTAL ¹		RX REIMBURSED PRESCRIPTIONS ²		RX NONREIMBURSED PRESCRIPTIONS ³		NON RX PRODUCTS ⁴	
	TOTAL	CHANGE VS 2025	TOTAL	CHANGE VS 2025	TOTAL	CHANGE VS 2025	TOTAL	CHANGE VS 2025
January	5,372	1.4%	1,547	6.2%	1,578	4.0%	2,195	-3.4%
February	10,494	2.7%	3,038	7.8%	3,098	6.9%	4,255	-3.3%
March	15,957	3.1%	4,684	7.9%	4,756	7.6%	6,362	-3.3%
April	21,417	4.4%	6,298	8.3%	6,421	9.1%	8,489	-1.5%
May	26,467	4.3%	7,815	7.2%	7,987	9.3%	10,403	-1.3%
June	31,509	4.8%	9,339	7.3%	9,570	10.4%	12,287	-0.9%
July								
August								
September								
October								
November								
December								

TRENDS

TOTAL MONTHLY PHARMACY SALES IN PLN MILLION



TOTAL MONTHLY SALES IN AN AVERAGE PHARMACY IN PLN THOUSAND



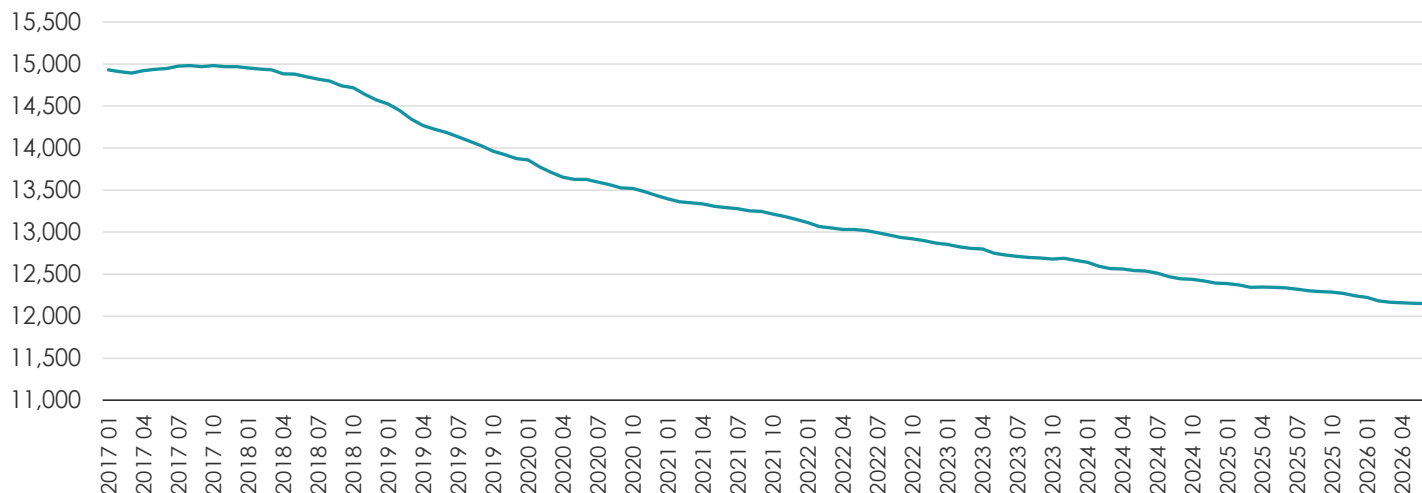
AVERAGE PHARMACY

	JUNE'26	YTD'2026	MAY'26	CHANGE		JUNE'25	CHANGE		YTD'2025	CHANGE		
				VALUE	%		VALUE	%		VALUE	%	
TOTAL TURNOVER (THOUSAND PLN)												
Total open market ¹	415.0	2,588.5	415.5	-0.5	-0.1%	379.5	35.5	9.4%	2,433.0	155.5	6.4%	
Rx reimbursed ²	125.4	767.2	124.8	0.6	0.5%	114.3	11.1	9.7%	704.4	62.8	8.9%	
Rx nonreimbursed ³	130.3	786.3	128.9	1.4	1.1%	110.2	20.1	18.2%	701.3	84.9	12.1%	
Non Rx products ⁴	155.0	1,009.3	157.6	-2.5	-1.6%	151.2	3.8	2.5%	1,003.9	5.5	0.5%	
AVERAGE PRICE ⁵ PER PACK (PLN)												
Total ¹	35.96	35.31	35.90	0.06	0.2%	33.82	2.14	0.06	33.82	1.49	4.4%	
For reimbursed Rx products ²	37.66	37.63	37.62	0.04	0.1%	36.77	0.89	0.02	36.77	0.86	2.3%	
For nonreimbursed products ³	51.71	49.60	50.82	0.89	1.8%	46.33	5.38	11.6%	46.33	3.26	7.0%	
For Non Rx products ⁴	27.40	27.42	27.76	-	0.36	-1.3%	26.34	1.06	4.0%	26.34	1.08	4.1%
AVERAGE MARK-UP*												
Total ¹	28.4%	27.2%	29.0%	-0.6%	-2.0%	26.5%	1.9%	7.2%	26.3%	0.9%	3.5%	
For reimbursed Rx products ²	18.7%	18.8%	19.7%	-1.0%	-5.1%	20.2%	-1.4%	-7.1%	19.9%	-1.1%	-5.6%	
For nonreimbursed Rx products ³	23.7%	22.2%	19.8%	3.9%	19.6%	21.8%	1.9%	8.8%	21.5%	0.7%	3.5%	
For Non Rx products ⁴	34.9%	34.4%	38.8%	-4.0%	-10.2%	32.0%	2.9%	9.1%	32.5%	1.9%	6.0%	
NUMBER OF PATIENTS												
Total ¹	4,060	26,440	4,270	-210	-4.9%	4,180	-120	-2.9%	27,220	-780	-2.9%	
For reimbursed Rx products ²	900	5,620	910	-10	-1.1%	930	-30	-3.2%	6,040	-420	-7.0%	
For nonreimbursed Rx products ³	1,080	6,760	1,080	0	0.0%	980	100	10.2%	6,030	730	12.1%	
For Non Rx products ⁴	3,190	21,080	3,370	-180	-5.3%	3,340	-150	-4.5%	21,900	-820	-3.7%	
NUMBER OF PHARMACIES - SUMMARY ⁶												
	12,151	12,173	12,153	-2	0.0%	12,338	-187	-1.5%	12,355	-183	-1.5%	

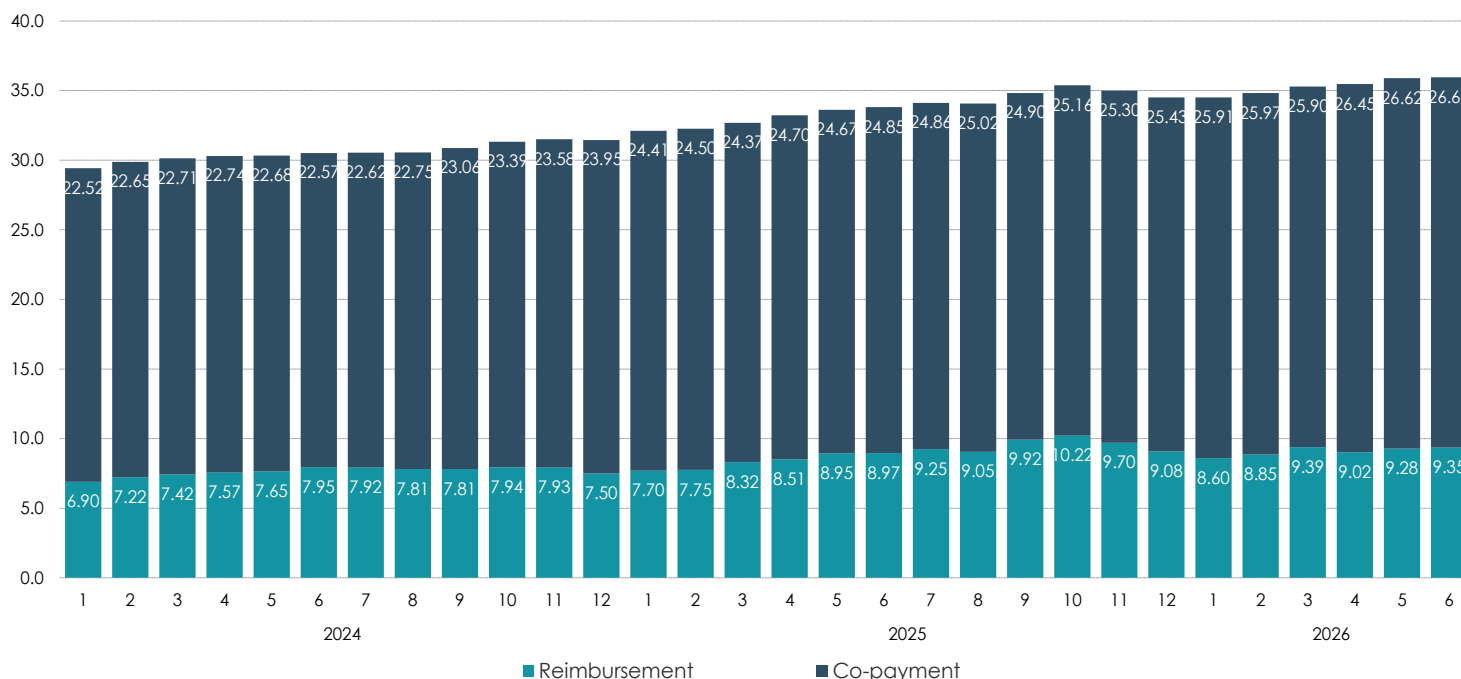
* Values in „Change – value“ for average mark-up in percentage points

Number of pharmacies based on PEX's analysis, average monthly number of pharmacies

PHARMACIES ON THE OPEN MARKET



PRICE



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

PEX COMMENTARY

The pharmacy market in June 2026 saw sales go close to 5042.7m PLN. Value of sales compared to June 2025 grew by 360.4m PLN (+7.7%). Compared to May of 2026, sales fell by approximately 6.9m PLN (-0.1%). Turnover of a statistical pharmacy in June 2026 was 415 thousand PLN, this was an increase by 9.4% compared to the same period in 2025.

Compared to the same period of 2025 the value of tracked segments grew for all monitored segments. Sales based on reimbursed prescriptions grew by 113.7m PLN (+8.1%), sales based on non-reimbursed prescriptions grew by 223.4m PLN (+16.4%), the non-prescription segment grew by 18.4m PLN (+1%).

Compared to the previous month, the value of tracked segments grew for two monitored segments. Value of reimbursed prescriptions grew by 6.8m PLN (+0.4%), value of non-reimbursed RX drugs grew by 16.9m PLN (+1.1%) and value of products sold without a prescriptions fell by 31.2m PLN (-1.6%).

The average retail drug price in June 2026 was 35.96 PLN and was 0.2% higher than the average price in the previous month, and 6.3% higher than the average price in June 2025. The average retail price of reimbursed prescription was 37.66 PLN (+2.4% vs June 2025), 51.71 PLN for non-reimbursed prescriptions (+11.6% vs June 2025) and 27.4 PLN for products sold without a prescription (+4% vs June 2025).

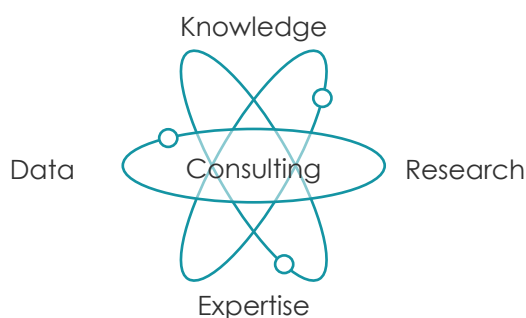
Average pharmacy margin for all drugs in June 2026 was 28.4% and was higher by 7.2% than margin in the same period of 2025. Compared to May 2026, the average pharmacy margin was lower by 2%.

Drug reimbursement by the National Health Fund in June was in the amount 1312m PLN, 5.6% more than in the same period of 2025. The level of patient copayment for reimbursed drugs in June was 15.6%, fell by 0.1p.p. compared to previous month and grew by 2p.p. compared to the same period in 2025.

ABOUT US

PEX 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 **50+ 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



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Ask us a question:
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