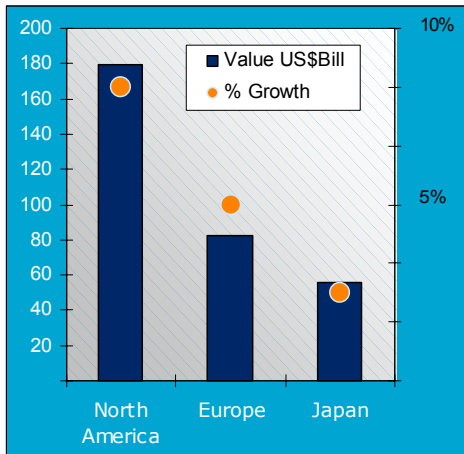


# IMS Retail Drug Monitor

Tracking 13 Key Global Pharma Markets

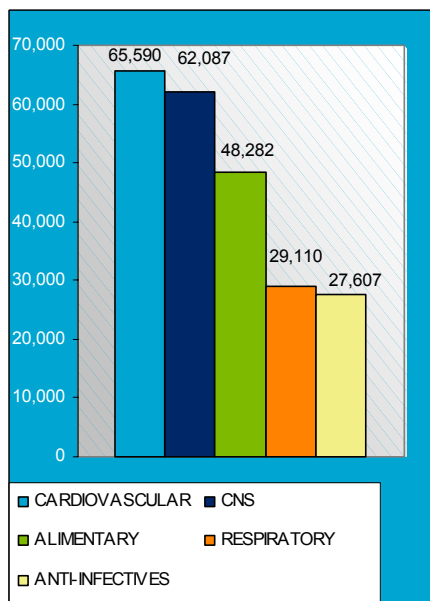
12 months to July 2004

## Regional Sales Breakdown: \$US Billions



Source: IMS Health

## Therapy Sales Breakdown: \$US Millions



Source: IMS Health

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**IMS HEALTH**, the global healthcare information company, today reported an 8% growth in drug sales through retail pharmacies in 13 key markets in the 12-month period from August 2003 through to July 2004, closing at US\$335 billion.

**IMS Retail Drug Monitor covers direct and indirect pharmacy channel purchases from wholesalers and manufacturers in 13 key countries. Sales figures are at ex-manufacturer prices and include all prescription and certain over-the-counter data. Figures include sales from the hospital sector in Japan and mail order in the USA.**

- Retail pharmacy sales for these key markets had an 8% growth at constant exchange to July 2004, no change to our previous survey.
- Sales in the top five **European** markets showed a 6% constant exchange growth, a slight decrease to last months survey.
- **North America** posted a 10% sales growth at \$179 billion in sales in the 12 months to July. The Key therapy growth area for North America was the Central Nervous System group with a 15% growth at constant exchange.
- **Japan's** overall growth at constant exchange remained at 3%, with a market worth \$55.69 billion in the 12 months to July 2004.
- US dollar Growth in the three **Latin American Markets** decreased slightly since our last survey.
- By **therapeutic category** the biggest increase worldwide were the blood agents and musculo-skeletal categories, both with a sales growth at constant exchange of 14%.
- The **single largest therapeutic sub category** in dollar sales continues to be the C10, hypolipidemia, class selling \$25.02 billion with a growth of 12.8% in the 12 months to July 2004. The second biggest group is the A2, anti-ulcerants, class at \$21.51 billion and a 2.5% growth.
- The **best selling drug** for the 12 months ending July 2004 was still Lipitor, worth over \$9.89 billion, with growth at 12.9%. Plavix, new in the top 5, has the largest growth in at the top with 35.7% The five top drugs are 1. Lipitor, 2. Zocor, 3. Nexium, 4. Norvasc, 5. Plavix.
- The top 5 **corporations** in the year to July 2004 in order continued to be: 1: Pfizer, 2. GlaxoSmithKline, 3. Merck, 4. AstraZeneca, 5, Novartis.

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

### IMS HEALTH - RETAIL DRUG MONITOR: 12 MONTHS TO JULY 2004

	12 MONTHS JULY 2004 US\$ MILLIONS	12 MONTHS JULY 2003 US\$ MILLIONS	% GROWTH US\$	% GROWTH AT CONSTANT EXCHANGE*
<b>SELECTED WORLD</b>	335,018	296,024	13	8
<b>NORTH AMERICA</b>	179,230	162,534	10	10
U.S.A.	169,813	154,809	10	10
CANADA	9,418	7,724	22	10
<b>EUROPE (leading 5)</b>	82,426	68,975	20	6
GERMANY	23,998	20,323	18	4
FRANCE	20,178	16,845	20	6
ITALY	13,983	11,804	18	5
UNITED KINGDOM	14,587	12,121	20	9
SPAIN	9,681	7,882	23	9
<b>JAPAN (*including Hospital)</b>	55,691	49,708	12	3
<b>LATIN AMERICA (leading 3)</b>	12,725	11,052	15	20
MEXICO	6,288	6,098	3	11
BRAZIL	4,714	3,656	29	29
ARGENTINA	1,722	1,297	33	33
<b>AUSTRALIA/NEW ZEALAND</b>	4,945	3,756	32	10
<b>THERAPEUTIC CATEGORY</b>				
1 CARDIOVASCULAR	65,590	57,351	14	8
2 CENTRAL NERVOUS SYSTEM	62,087	52,912	17	13
3 ALIMENTARY/METABOLISM	48,282	43,901	10	5
4 RESPIRATORY	29,110	26,991	8	3
5 ANTI-INFECTIVES	27,607	25,342	9	4
6 MUSCULO-SKELETAL	21,609	18,125	19	14
7 GENITO-URINARY	18,061	16,614	9	5
8 CYTOSTATICS	16,106	13,704	18	11
9 DERMATOLOGICALS	9,921	9,113	9	4
10 BLOOD AGENTS	11,913	9,824	21	14
11 SENSORY ORGANS	6,776	5,971	13	8
12 DIAGNOSTIC AGENTS	6,128	5,327	15	8
13 HORMONES	5,376	4,640	16	10
14 MISCELLANEOUS	3,992	3,942	1	(3)
15 HOSPITAL SOLUTIONS	1,982	1,854	7	(2)
16 PARASITOLOGY	479	414	16	12

**\*Constant Exchange takes out the effect of fluctuating exchange rates**

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

### IMS HEALTH - RETAIL DRUG MONITOR: 12 MONTHS TO JULY 2004

	US		JAPAN		GERMANY		FRANCE		ITALY		UK	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	169,813	10	55,691	3	23,998	4	20,178	6	13,983	5	14,587	9
CARDIOVASCULAR	30,296	12	11,203	4	5,044	(1)	4,629	2	3,616	7	3,720	11
CENTRAL NERVOUS SYST	39,542	15	4,415	9	3,559	10	3,307	7	1,841	5	2,886	10
ALIMENTARY/MET.	23,765	5	8,163	2	3,726	4	2,928	3	1,994	4	2,134	5
ANTI-INFECTIVES	13,777	6	5,909	0	1,766	3	1,744	7	1,253	(1)	490	5
RESPIRATORY	15,415	3	3,695	(6)	1,805	1	1,761	5	1,163	3	1,677	7
MUSCULO-SKELETAL	11,175	18	3,596	4	1,304	13	1,192	8	859	8	895	21
GENITO-URINARY	10,434	4	1,211	6	1,312	0	1,133	(3)	849	4	725	0
CYTOSTATICS	6,693	9	4,496	8	1,776	14	933	47	569	3	451	10
DERMATOLOGICALS	4,649	5	1,352	2	683	(6)	575	(2)	436	3	508	3
BLOOD AGENTS	4,696	21	3,552	4	1,006	17	730	14	559	7	378	25
SENSORY ORGANS	2,894	11	1,675	1	370	6	416	6	311	5	243	7
DIAGNOSTIC AGENTS	2,363	8	2,031	7	635	6	324	12	259	14	237	11
HORMONES	2,474	18	1,119	(1)	496	6	343	6	203	(3)	156	6
MISCELLANEOUS	1,439	(16)	1,466	5	396	2	94	16	41	(2)	21	(4)
HOSPITAL SOLUTIONS	4	68	1,804	(3)	91	3	27	27	22	3	13	6
PARASITOLOGY	195	16	4	3	29	1	41	13	7	5	52	6

	CANADA		SPAIN		BRAZIL		MEXICO		ARGENTINA		AUST./NZ	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	9,418	10	9,681	9	4,714	29	6,288	11	1,722	33	4,945	10
CARDIOVASCULAR	2,309	9	2,140	4	627	31	544	12	276	32	1,187	12
CENTRAL NERVOUS SYST	1,871	11	1,979	12	711	33	768	12	312	32	894	10
ALIMENTARY/MET.	1,374	9	1,208	5	793	28	1,160	10	288	34	749	9
ANTI-INFECTIVES	499	9	540	2	311	24	922	4	156	30	239	(2)
RESPIRATORY	681	8	1,004	14	478	30	766	19	134	28	530	10
MUSCULO-SKELETAL	640	12	568	15	381	29	536	11	139	41	325	13
GENITO-URINARY	462	5	602	11	551	30	464	13	118	29	199	5
CYTOSTATICS	461	19	451	12	25	(15)	51	19	6	(44)	193	12
DERMATOLOGICALS	323	3	329	9	384	27	359	5	100	40	223	7
BLOOD AGENTS	245	22	374	13	84	41	115	11	41	39	132	25
SENSORY ORGANS	161	8	240	12	146	28	152	13	53	35	114	10
DIAGNOSTIC AGENTS	206	10	1	(16)	6	36	9	13	21	91	36	(7)
HORMONES	75	7	216	4	111	32	117	11	42	25	24	11
MISCELLANEOUS	92	(4)	19	42	52	18	267	13	28	39	78	(3)
HOSPITAL SOLUTIONS	2	(19)	3	2	3	5	10	2	1	40	2	7
PARASITOLOGY	17	14	6	24	51	18	49	3	8	27	19	3

+: Growth is at Constant Exchange

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

## IMS HEALTH - RETAIL DRUG MONITOR: 12 MONTHS TO JULY 2004

	NORTH AMERICA			EUROPE TOP FIVE			JAPAN		
	\$M	%	+	\$M	%	+	\$M	%	+
CARDIOVASCULAR	32,605	18	13	19,149	23	17	11,203	20	13
CENTRAL NERVOUS SYSTEM	41,414	23	15	13,572	17	22	4,415	8	18
ALIMENTARY/METABOLISM	25,139	14	6	11,990	15	17	8,163	15	11
ANTI-INFECTIVES	14,276	8	6	5,794	7	17	5,909	11	9
RESPIRATORY	16,097	9	3	7,410	9	18	3,695	7	3
MUSCULO-SKELETAL	11,815	7	18	4,818	6	27	3,596	7	13
GENITO-URINARY	10,896	6	5	4,622	6	14	1,211	2	15
CYTOSTATICS	7,154	4	10	4,180	5	32	4,496	8	17
DERMATOLOGICALS	4,972	3	5	2,532	3	12	1,352	2	11
BLOOD AGENTS	4,942	3	22	3,047	4	29	3,552	6	14
SENSORY ORGANS	3,056	2	11	1,580	2	20	1,675	3	10
DIAGNOSTIC AGENTS	2,569	1	9	1,456	2	23	2,031	4	17
HORMONES	2,548	1	18	1,414	2	17	1,119	2	8
MISCELLANEOUS	1,531	1	(15)	570	1	19	1,466	3	14
HOSPITAL SOLUTIONS	6	0	33	157	0	21	1,804	3	6
PARASITOLOGY	212	0	17	136	0	21	4	0	12

+: Growth is at Constant Exchange

Sales figures in these tables cover direct and indirect pharmaceutical channel purchases (pharmacies plus hospital in Japan and mail order in the USA) from pharmaceutical wholesalers and manufacturers in 13 key global markets. Figures include prescription and certain over-the-counter data, and represent manufacturer prices. These countries account for over two thirds of the world market.

These figures are taken from the monthly pharmaceutical audit conducted by IMS Health, the leading provider of healthcare information worldwide and cover the 12 month period from **August 2003 through to July 2004**. Sales for Argentina and Brazil are presented in US dollars only. The decision for the conversion to US dollars was due to excessive inflation and subsequent devaluations leading to both local currency and exchange rates exceeding the field sizes available for them on IMS databases.

- The selected regions are broken out by country.
- Each area is also shown in terms of broad therapeutic category.
- All sales values are shown in millions of dollars at prevailing exchange rates.
- In order to remove the effects of fluctuating exchange rates, growth rates are calculated net of exchange, in other words, growth figures are shown at local currency level or constant exchange except for the majority of the Latin America countries exclusive of Mexico, Chile, Colombia and Peru.
- In Argentina and Brazil sales are recorded in US dollars in Mexico – local currency.
- The unique system in Japan reduces the importance of the pharmacy in the distribution chain - sales reported include hospital data. In other countries sales monitored are limited to retail pharmacy only and do not include hospital data. In the USA our survey includes sales through mail order channels.

Operating in more than 100 countries, IMS Health is the world's leading provider of information solutions to the pharmaceutical and healthcare industries. With \$1.4 billion in 2003 revenue and 50 years of industry experience, IMS Health offers leading-edge business intelligence products and services that are integral to clients' day-to-day operations. These include marketing effectiveness solutions for prescription and over-the-counter pharmaceutical products; sales optimisation solutions to increase pharmaceutical sales force productivity; and consulting and customised services that turn information into actionable insights.

