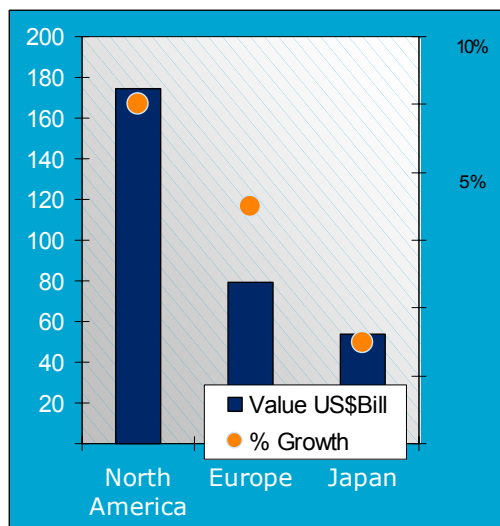


# IMS Retail Drug Monitor

Tracking 13 Key Global Pharma Markets

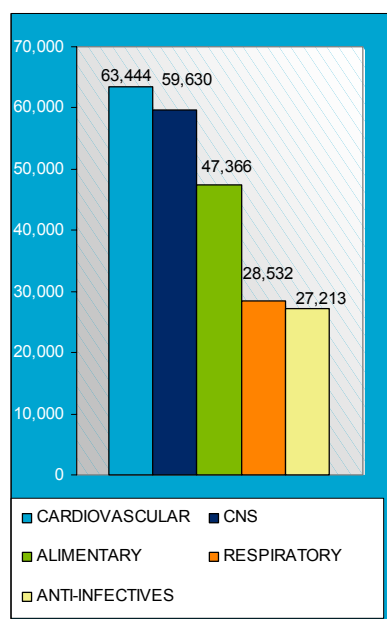
12 months to March 2004

## 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 April 2003 through to March 2004, closing at US\$325.08 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 March 2004, showing no change compared to our last survey.
- Sales in the top five **European** markets showed a 7% constant exchange growth, a slight decrease to last months survey.
- North America** posted a 10% sales growth at \$174 billion in sales in the 12 months to March, the same as our last survey. The Key therapy growth area for North America was the Central Nervous System group with a 23% growth in the same period.
- Japan's** overall growth at constant exchange remained at 3%, with a market worth \$54 billion in the 12 months to March 2004.
- US dollar Growth in the three **Latin American Markets** improved during this period – posting a superior performance to our last survey.
- By **therapeutic category** the biggest increase worldwide were in the blood agents and CNS groups with a sales growth at constant exchange of 15% and 14% respectively.
- The **single largest therapeutic sub category** in dollar sales continues to be the C10, hypolipidemia, class selling \$24.2 billion with a growth of 13% in the 12 months to March 2004. The second biggest group is the A2, anti-ulcerants, class at \$21.39 billion and a 6% growth.
- The **best selling drug** for the 12 months ending March 2004 was still Lipitor, worth over \$9.4 billion, with growth at 12%. Nexium has the largest growth at the top with 46%. The five top drugs are 1. Lipitor, 2. Zocor, 3. Norvasc, 4. Nexium, 5. Prevacid (Ogastro).
- The top 5 **corporations** in the year to March 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 MAR 2004

	12 MONTHS MAR 2004 US\$ MILLIONS	12 MONTHS MAR 2003 US\$ MILLIONS	% GROWTH US\$	% GROWTH AT CONSTANT EXCHANGE*
<b>SELECTED WORLD</b>	325,086	283,903	15	8
<b>NORTH AMERICA</b>	174,655	157,388	11	10
U.S.A.	165,179	149,949	10	10
CANADA	9,476	7,439	27	11
<b>EUROPE (leading 5)</b>	79,311	63,694	25	7
GERMANY	23,325	18,702	25	6
FRANCE	19,474	15,498	26	6
ITALY	13,419	11,044	22	3
UNITED KINGDOM	13,765	11,360	21	11
SPAIN	9,328	7,089	32	11
<b>JAPAN (*including Hospital)</b>	54,001	48,538	11	3
<b>LATIN AMERICA (leading 3)</b>	12,462	10,797	15	20
MEXICO	6,278	6,060	4	11
BRAZIL	4,522	3,647	24	24
ARGENTINA	1,662	1,091	52	52
<b>AUSTRALIA/NEW ZEALAND</b>	4,657	3,486	34	8
<b>THERAPEUTIC CATEGORY</b>				
1 CARDIOVASCULAR	63,444	55,091	15	8
2 CENTRAL NERVOUS SYSTEM	59,630	49,940	19	14
3 ALIMENTARY/METABOLISM	47,366	42,043	13	7
4 RESPIRATORY	28,532	26,628	7	2
5 ANTI-INFECTIVES	27,213	24,542	11	5
6 MUSCULO-SKELETAL	20,618	17,202	20	14
7 GENITO-URINARY	17,809	16,237	10	5
8 CYTOSTATICS	15,284	13,029	17	10
9 DERMATOLOGICALS	9,766	8,784	11	5
10 BLOOD AGENTS	11,292	9,174	23	15
11 SENSORY ORGANS	6,565	5,710	15	8
12 DIAGNOSTIC AGENTS	5,948	5,053	18	10
13 HORMONES	5,175	4,423	17	10
14 MISCELLANEOUS	4,030	3,821	5	0
15 HOSPITAL SOLUTIONS	1,954	1,820	7	(1)
16 PARASITOLOGY	460	406	13	9

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

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

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

	US		JAPAN		GERMANY		FRANCE		ITALY		UK	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	165,179	10	54,001	3	23,325	6	19,474	6	13,419	3	13,765	11
CARDIOVASCULAR	29,110	10	10,916	5	5,039	2	4,504	3	3,424	4	3,498	14
CENTRAL NERVOUS SYST	38,015	16	4,189	8	3,399	11	3,209	8	1,771	4	2,711	12
ALIMENTARY/MET.	23,534	8	7,939	1	3,625	5	2,837	3	1,920	3	2,042	7
ANTI-INFECTIVES	13,658	8	5,808	0	1,713	3	1,681	5	1,223	(4)	472	6
RESPIRATORY	15,261	0	3,627	(4)	1,759	0	1,707	6	1,117	0	1,590	8
MUSCULO-SKELETAL	10,622	18	3,477	3	1,228	10	1,137	7	805	5	817	21
GENITO-URINARY	10,344	4	1,157	4	1,312	3	1,125	(1)	828	4	702	1
CYTOSTATICS	6,411	8	4,261	6	1,663	13	825	48	552	0	424	11
DERMATOLOGICALS	4,608	7	1,303	(1)	693	(3)	567	(1)	429	3	487	5
BLOOD AGENTS	4,393	24	3,430	4	944	18	690	15	532	3	341	29
SENSORY ORGANS	2,820	12	1,612	(1)	358	7	402	8	301	6	230	8
DIAGNOSTIC AGENTS	2,310	9	1,986	12	614	6	304	10	246	16	222	12
HORMONES	2,341	18	1,104	0	477	5	333	9	202	(4)	148	9
MISCELLANEOUS	1,563	(4)	1,403	2	386	2	90	17	40	(3)	18	(35)
HOSPITAL SOLUTIONS	4	131	1,784	(2)	87	2	25	28	22	3	12	3
PARASITOLOGY	185	12	4	3	28	(3)	39	10	6	(14)	50	2

	CANADA		SPAIN		BRAZIL		MEXICO		ARGENTINA		AUST./NZ	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	9,476	11	9,328	11	4,522	24	6,278	11	1,662	52	4,657	8
CARDIOVASCULAR	2,345	10	2,096	8	599	25	533	11	265	42	1,113	12
CENTRAL NERVOUS SYST	1,861	13	1,889	15	676	28	767	14	300	49	844	9
ALIMENTARY/MET.	1,382	10	1,178	7	765	23	1,160	10	278	53	704	8
ANTI-INFECTIVES	498	10	539	6	300	19	948	7	151	61	223	(7)
RESPIRATORY	688	10	956	15	450	25	749	17	130	59	498	7
MUSCULO-SKELETAL	664	17	537	16	365	23	530	11	132	61	305	14
GENITO-URINARY	472	5	572	13	534	26	459	13	114	45	190	2
CYTOSTATICS	447	19	430	15	28	(16)	54	34	10	21	179	11
DERMATOLOGICALS	320	2	314	10	369	21	366	9	97	59	212	5
BLOOD AGENTS	254	30	355	17	79	37	115	14	39	63	121	27
SENSORY ORGANS	160	7	228	15	141	26	154	15	51	53	109	10
DIAGNOSTIC AGENTS	198	9	2	(13)	5	20	8	4	18	127	35	(5)
HORMONES	75	9	208	3	106	28	117	11	41	46	23	9
MISCELLANEOUS	94	0	17	57	50	12	261	10	26	59	80	(4)
HOSPITAL SOLUTIONS	2	(19)	3	5	3	1	10	1	1	69	1	(2)
PARASITOLOGY	17	15	5	35	51	13	50	3	7	52	19	5

+: Growth is at Constant Exchange

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

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

	NORTH AMERICA			EUROPE TOP FIVE			JAPAN		
	\$M	%	+	\$M	%	+	\$M	%	+
CARDIOVASCULAR	31,456	18	10	18,194	23	5	10,916	20	5
CENTRAL NERVOUS SYSTEM	39,876	23	16	12,682	16	10	4,189	8	8
ALIMENTARY/METABOLISM	24,916	14	8	11,386	15	5	7,939	15	1
ANTI-INFECTIVES	14,156	8	8	5,548	7	2	5,808	11	0
RESPIRATORY	15,949	9	1	7,021	9	5	3,627	7	(4)
MUSCULO-SKELETAL	11,286	7	18	4,413	6	11	3,477	6	3
GENITO-URINARY	10,816	6	4	4,463	6	3	1,157	2	4
CYTOSTATICS	6,859	4	9	3,776	5	17	4,261	8	6
DERMATOLOGICALS	4,928	3	7	2,450	3	2	1,303	2	(1)
BLOOD AGENTS	4,647	3	24	2,784	4	14	3,430	6	4
SENSORY ORGANS	2,980	2	12	1,487	2	8	1,612	3	(1)
DIAGNOSTIC AGENTS	2,508	1	9	1,356	2	9	1,986	4	12
HORMONES	2,416	1	18	1,343	2	5	1,104	2	0
MISCELLANEOUS	1,658	1	(4)	541	1	3	1,403	3	2
HOSPITAL SOLUTIONS	5	0	40	150	0	6	1,784	3	(2)
PARASITOLOGY	201	0	12	128	0	4	4	0	3

+: 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 **April 2003 through to March 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.

