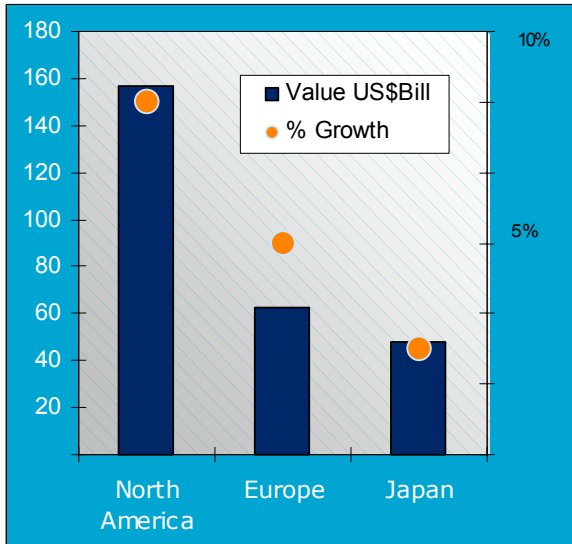


# IMS Retail Drug Monitor

Tracking 13 Key Global Pharma Markets

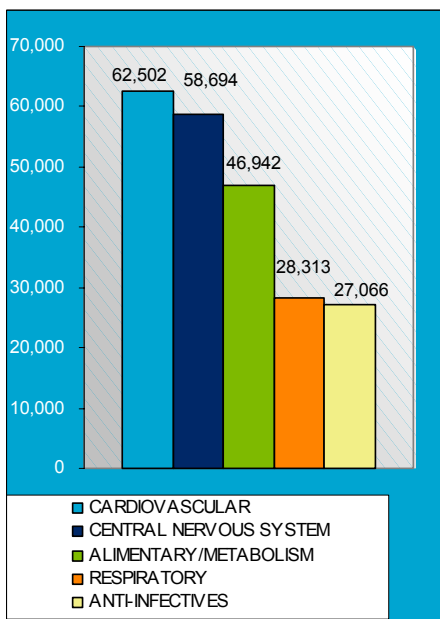
12 months to February 2004

## 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 March 2003 through to February 2004, closing at US\$321.07 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 February 2004, showing no change compared to our last survey.
- Sales in the top five **European** markets showed a 6% constant exchange growth, a slight decrease to last months survey.
- **North America** posted an 10% sales growth at \$173 billion in sales in the 12 months to February, the same as our last survey. The Key therapy growth area for North America was the Central Nervous System group with a 16% growth in the same period.
- **Japan's** overall growth at constant exchange remained at 3%, with a market worth \$53.36 billion in the 12 months to February 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** again 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 February 2004. The second biggest group is the A2, anti-ulcerants, class at \$21.99 billion and a 6% growth.
- The **best selling drug** for the 12 months ending February 2004 was still Lipitor, worth over \$9.5 billion, with growth at 12%. Nexium has the largest growth at the top with 51%. The five top drugs are 1. Lipitor, 2. Zocor, 3. Norvasc, 4. Prevacid (Ogastro) 5. Nexium.
- The top 5 **corporations** in the year to February 2004 in order continued to be: 1: Pfizer, 2. GlaxoSmithKline, 3. Merck, 4. AstraZeneca, 5, Novartis.

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIE

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

	12 MONTHS FEB 2004 US\$ MILLIONS	12 MONTHS FEB 2003 US\$ MILLIONS	% GROWTH US\$	% GROWTH AT CONSTANT EXCHANGE*
<b>SELECTED WORLD</b>	321,070	280,666	14	8
<b>NORTH AMERICA</b>	173,263	155,933	11	10
U.S.A.	163,972	148,645	10	10
CANADA	9,290	7,288	27	11
<b>EUROPE (leading 5)</b>	77,715	62,362	25	6
GERMANY	22,910	18,288	25	5
FRANCE	19,090	15,188	25	6
ITALY	13,146	10,825	21	2
UNITED KINGDOM	13,430	11,189	20	10
SPAIN	9,138	6,873	33	12
<b>JAPAN (*including Hospital)</b>	53,362	48,069	11	3
<b>LATIN AMERICA (leading 3)</b>	12,213	10,874	12	12
MEXICO	6,241	6,076	3	3
BRAZIL	4,353	3,727	17	17
ARGENTINA	1,619	1,071	51	51
<b>AUSTRALIA/NEW ZEALAND</b>	4,517	3,428	32	7

#### THERAPEUTIC CATEGORY

1 CARDIOVASCULAR	62,502	54,488	15	7
2 CENTRAL NERVOUS SYSTEM	58,694	49,173	19	14
3 ALIMENTARY/METABOLISM	46,942	41,564	13	7
4 RESPIRATORY	28,313	26,496	7	1
5 ANTI-INFECTIVES	27,066	24,351	11	5
6 MUSCULO-SKELETAL	20,269	16,972	19	13
7 GENITO-URINARY	17,665	16,139	9	4
8 CYTOSTATICS	15,023	12,799	17	10
9 DERMATOLOGICALS	9,660	8,707	11	5
10 BLOOD AGENTS	11,075	8,994	23	15
11 SENSORY ORGANS	6,488	5,645	15	8
12 DIAGNOSTIC AGENTS	5,871	4,984	18	10
13 HORMONES	5,104	4,357	17	10
14 MISCELLANEOUS	4,015	3,783	6	1
15 HOSPITAL SOLUTIONS	1,932	1,810	7	(2)
16 PARASITOLOGY	452	404	12	6

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

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

	US		JAPAN		GERMANY		FRANCE		ITALY		UK	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	163,972	10	53,362	3	22,910	5	19,090	6	13,146	2	13,430	10
CARDIOVASCULAR	28,834	9	10,729	5	4,972	3	4,431	2	3,322	2	3,407	13
CENTRAL NERVOUS SYST	37,550	17	4,118	7	3,318	10	3,139	8	1,737	3	2,643	11
ALIMENTARY/MET.	23,511	9	7,850	1	3,564	4	2,786	3	1,881	2	1,997	7
ANTI-INFECTIVES	13,660	9	5,768	0	1,693	3	1,647	3	1,214	(2)	462	5
RESPIRATORY	15,188	0	3,650	(3)	1,744	1	1,682	6	1,105	0	1,557	7
MUSCULO-SKELETAL	10,477	18	3,430	2	1,196	10	1,115	6	787	5	790	20
GENITO-URINARY	10,330	4	1,142	5	1,290	2	1,111	(1)	813	3	690	0
CYTOSTATICS	6,355	9	4,187	6	1,618	12	783	44	541	(2)	415	11
DERMATOLOGICALS	4,586	7	1,287	(1)	684	(3)	559	(1)	424	5	477	5
BLOOD AGENTS	4,319	24	3,383	3	919	18	671	14	519	0	329	28
SENSORY ORGANS	2,788	12	1,610	0	350	6	395	8	296	6	225	7
DIAGNOSTIC AGENTS	2,298	10	1,957	11	601	5	297	10	240	18	216	11
HORMONES	2,311	18	1,096	0	467	4	326	8	200	(4)	145	9
MISCELLANEOUS	1,580	(2)	1,388	2	381	3	87	15	40	(4)	18	(41)
HOSPITAL SOLUTIONS	3	163	1,765	(2)	85	2	24	26	21	2	12	2
PARASITOLOGY	182	11	4	5	28	(4)	38	8	6	(17)	48	0

	CANADA		SPAIN		BRAZIL		MEXICO		ARGENTINA		AUST./NZ	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	9,290	11	9,138	12	4,353	17	6,241	3	1,619	51	4,517	7
CARDIOVASCULAR	2,301	10	2,062	8	579	19	529	3	259	40	1,076	11
CENTRAL NERVOUS SYST	1,822	13	1,846	15	649	21	762	5	293	48	819	8
ALIMENTARY/MET.	1,356	11	1,158	7	737	15	1,148	1	271	52	684	8
ANTI-INFECTIVES	488	10	532	6	287	11	951	(1)	146	60	218	(7)
RESPIRATORY	673	9	933	15	429	17	741	7	126	59	485	5
MUSCULO-SKELETAL	649	17	524	16	352	16	526	2	127	59	296	14
GENITO-URINARY	464	5	559	13	515	19	455	4	112	42	185	1
CYTOSTATICS	438	20	420	17	28	(16)	55	27	11	43	173	10
DERMATOLOGICALS	316	3	305	10	357	14	364	1	95	58	206	5
BLOOD AGENTS	246	30	346	17	76	30	114	6	38	64	115	26
SENSORY ORGANS	157	8	223	15	137	21	153	7	50	53	105	9
DIAGNOSTIC AGENTS	194	9	2	(11)	5	11	8	(6)	17	130	35	(5)
HORMONES	74	11	204	3	101	20	116	2	41	49	22	8
MISCELLANEOUS	93	0	16	59	49	6	259	2	26	56	79	(4)
HOSPITAL SOLUTIONS	2	(24)	3	6	3	(5)	10	(10)	1	67	1	(6)
PARASITOLOGY	16	14	5	38	49	6	50	(4)	7	55	18	4

+: Growth is at Constant Exchange

## KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

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

	NORTH AMERICA			EUROPE TOP FIVE			JAPAN		
	\$M	%	+	\$M	%	+	\$M	%	+
CARDIOVASCULAR	31,136	20	9	18,194	23	5	10,729	20	5
CENTRAL NERVOUS SYSTEM	39,372	23	16	12,682	16	10	4,118	8	7
ALIMENTARY/METABOLISM	24,867	14	9	11,386	15	4	7,850	15	1
ANTI-INFECTIVES	14,148	8	9	5,548	7	2	5,768	11	0
RESPIRATORY	15,861	9	0	7,021	9	5	3,650	7	(3)
MUSCULO-SKELETAL	11,126	6	18	4,413	6	10	3,430	6	2
GENITO-URINARY	10,794	6	4	4,463	6	3	1,142	2	5
CYTOSTATICS	6,793	4	10	3,776	5	15	4,187	8	6
DERMATOLOGICALS	4,902	3	7	2,450	3	2	1,287	2	(1)
BLOOD AGENTS	4,565	3	25	2,784	4	14	3,383	6	3
SENSORY ORGANS	2,945	2	12	1,487	2	8	1,610	3	0
DIAGNOSTIC AGENTS	2,492	1	10	1,356	2	9	1,957	4	11
HORMONES	2,385	1	18	1,343	2	4	1,096	2	0
MISCELLANEOUS	1,674	1	(2)	541	1	3	1,388	3	2
HOSPITAL SOLUTIONS	5	0	41	146	0	5	1,765	3	(2)
PARASITOLOGY	198	0	11	125	0	2	4	0	5

+: 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 **February 2003 through to February 2004**. Sales for Argentina, Brazil and Mexico 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 Latin America.
- In Latin America sales are recorded in US dollars and not local currencies.
- 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.

***Any use of this should be sourced to IMS Health, IMS Retail Drug Monitor.***

