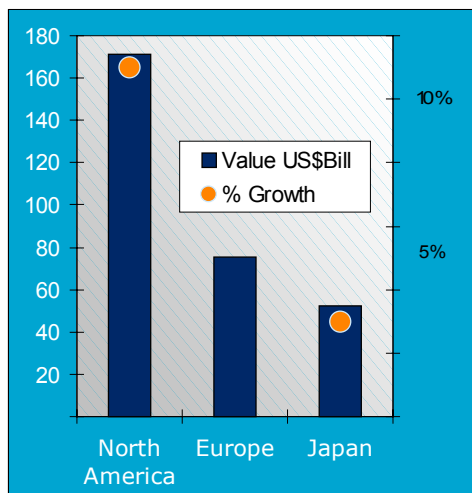


# IMS Retail Drug Monitor

Tracking 13 Key Global Pharma Markets

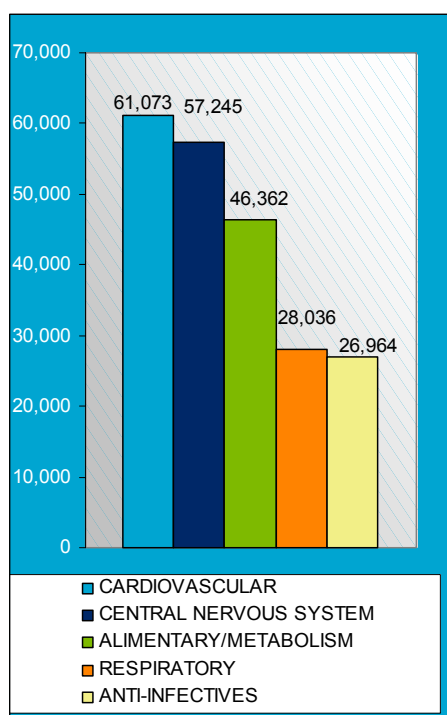
12 months to January 2004

## Regional Sales Breakdown: \$US Billions



Source: IMS Health

## Therapy Sales Breakdown: \$US Millions



Source: IMS Health

### Press Contact/Editor:

Gail Nielen

Marketing Communications,  
IMS Health

7, Harewood Avenue, London NW1 6JB, UK.

T: +44 20 7393 5000 F: +44 20 7393 5999.

[gnielen@uk.imshealth.com](mailto:gnielen@uk.imshealth.com)

**Hot Topics - See page 5.**

**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 February 2003 through to January 2004, closing at US\$317.94 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 January 2004, showing no change compared to our last survey.
- Sales in the top five **European** markets showed a 7% constant exchange growth, the same as last months survey.
- **North America** posted an 11% sales growth at \$172 billion in sales in the 12 months to January, the same as our last survey. The Key therapy growth area for North America was the Central Nervous System group with a 17% growth in the same period.
- **Japan's** overall growth at constant exchange remained at 3%, with a market worth \$52.82 billion in the 12 months to January 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 14%.
- The **single largest therapeutic sub category** in dollar sales continues to be the C10, hypolipidemia, class selling \$23.2 billion with a growth of 13% in the 12 months to January 2004. The second biggest group is the A2, anti-ulcerants, class at \$21.1 billion and a 7% growth.
- The **best selling drug** for the 12 months ending January 2004 was still Lipitor, worth over \$9.1 billion, with growth at 12%. Nexium has the largest growth at the top with 55%. The five top drugs are 1. Lipitor, 2. Zocor, 3. Norvasc, 4. Prevacid (Ogastro) 5. Nexium.
- The top 5 **corporations** in the year to January 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 JAN 2004

	12 MONTHS JAN 2004 US\$ MILLIONS	12 MONTHS JAN 2003 US\$ MILLIONS	% GROWTH US\$	% GROWTH AT CONSTANT EXCHANGE*
<b>SELECTED WORLD</b>	317,948	275,078	14	8
<b>NORTH AMERICA</b>	172,018	154,820	11	11
U.S.A.	163,157	147,629	11	11
CANADA	8,862	7,191	23	11
<b>EUROPE (leading 5)</b>	76,630	61,026	26	7
GERMANY	22,748	17,851	27	7
FRANCE	18,793	14,848	27	6
ITALY	12,933	10,614	22	2
UNITED KINGDOM	13,177	11,015	20	10
SPAIN	8,980	6,698	34	12
<b>JAPAN (*including Hospital)</b>	52,825	47,613	11	3
<b>LATIN AMERICA (leading 3)</b>	12,079	10,951	10	10
MEXICO	6,220	6,088	2	2
BRAZIL	4,266	3,789	13	13
ARGENTINA	1,594	1,074	48	48
<b>AUSTRALIA/NEW ZEALAND</b>	4,396	3,376	30	7

#### THERAPEUTIC CATEGORY

1	CARDIOVASCULAR	61,788	53,918	15	7
2	CENTRAL NERVOUS SYSTEM	57,921	48,539	19	14
3	ALIMENTARY/METABOLISM	46,598	41,174	13	7
4	RESPIRATORY	28,185	26,336	7	2
5	ANTI-INFECTIVES	27,025	24,132	12	6
6	MUSCULO-SKELETAL	19,972	16,798	19	12
7	GENITO-URINARY	17,543	16,044	9	4
8	CYTOSTATICS	14,816	12,581	18	10
9	DERMATOLOGICALS	9,585	8,643	11	5
10	BLOOD AGENTS	10,892	8,845	23	14
11	SENSORY ORGANS	6,428	5,589	15	8
12	DIAGNOSTIC AGENTS	5,788	4,925	18	10
13	HORMONES	5,046	4,308	17	9
14	MISCELLANEOUS	4,000	3,753	8	1
15	HOSPITAL SOLUTIONS	1,916	3,753	7	(2)
16	PARASITOLOGY	445	402	10	5

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

## 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>	163,157	11	52,825	3	22,748	7	18,793	6	12,933	2	13,177	10
CARDIOVASCULAR	28,604	9	10,603	5	4,974	7	4,371	3	3,261	2	3,343	14
CENTRAL NERVOUS SYST	37,190	17	4,061	7	3,268	12	3,082	8	1,709	3	2,589	11
ALIMENTARY/MET.	23,489	10	7,776	1	3,542	8	2,746	3	1,846	1	1,963	6
ANTI-INFECTIVES	13,759	10	5,704	0	1,688	5	1,626	3	1,205	(2)	455	4
RESPIRATORY	15,175	(1)	3,679	0	1,741	5	1,664	7	1,089	0	1,534	7
MUSCULO-SKELETAL	10,360	18	3,388	1	1,178	12	1,097	6	772	5	768	19
GENITO-URINARY	10,307	4	1,129	5	1,285	6	1,100	0	801	3	682	0
CYTOSTATICS	6,323	10	4,123	5	1,590	15	752	42	532	(3)	406	10
DERMATOLOGICALS	4,574	7	1,273	(2)	684	0	553	(1)	420	6	470	5
BLOOD AGENTS	4,252	25	3,341	3	906	21	655	14	511	(1)	320	29
SENSORY ORGANS	2,767	12	1,609	1	346	9	388	8	290	5	220	7
DIAGNOSTIC AGENTS	2,286	10	1,925	10	593	6	291	10	232	19	211	11
HORMONES	2,286	18	1,088	0	463	7	323	9	198	(5)	142	9
MISCELLANEOUS	1,603	0	1,370	2	378	6	85	12	39	(5)	17	(45)
HOSPITAL SOLUTIONS	3	141	1,752	(3)	84	4	23	25	21	2	12	1
PARASITOLOGY	180	11	4	4	27	(2)	37	9	6	(19)	47	(2)

	CANADA		SPAIN		BRAZIL		MEXICO		ARGENTINA		AUST./NZ	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
<b>TOTAL</b>	8,862	11	8,980	12	4,266	13	6,220	2	1,594	48	4,396	7
CARDIOVASCULAR	2,200	11	2,036	9	567	14	528	3	255	36	1,047	10
CENTRAL NERVOUS SYST	1,735	13	1,809	16	635	16	760	5	288	45	797	8
ALIMENTARY/MET.	1,296	11	1,143	8	722	11	1,144	0	266	48	666	7
ANTI-INFECTIVES	464	9	530	7	282	7	957	(1)	144	59	212	(7)
RESPIRATORY	642	8	913	15	419	13	731	5	124	57	473	3
MUSCULO-SKELETAL	618	17	511	15	345	12	524	2	125	54	288	14
GENITO-URINARY	444	5	547	14	505	15	451	2	110	39	182	1
CYTOSTATICS	415	20	411	17	29	(15)	54	23	11	57	169	10
DERMATOLOGICALS	303	3	298	10	351	10	364	2	93	55	201	4
BLOOD AGENTS	232	30	338	17	74	26	114	7	38	64	112	26
SENSORY ORGANS	150	6	218	15	134	17	154	8	49	51	102	9
DIAGNOSTIC AGENTS	185	9	2	(10)	5	9	8	(7)	17	130	34	(4)
HORMONES	70	11	201	3	99	16	115	1	40	49	22	7
MISCELLANEOUS	90	(1)	15	63	48	3	256	0	25	51	74	(5)
HOSPITAL SOLUTIONS	2	(27)	3	5	3	(9)	10	(11)	1	63	1	(5)
PARASITOLOGY	15	13	5	40	48	2	50	(4)	7	54	17	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	30,803	18	9	17,985	24	6	10,603	20	5
CENTRAL NERVOUS SYSTEM	38,925	23	17	12,456	16	10	4,061	8	7
ALIMENTARY/METABOLISM	24,785	14	10	11,240	15	5	7,776	15	1
ANTI-INFECTIVES	14,223	8	10	5,504	7	3	5,704	11	0
RESPIRATORY	15,817	9	0	6,941	9	6	3,679	7	0
MUSCULO-SKELETAL	10,978	6	18	4,325	6	10	3,388	6	1
GENITO-URINARY	10,751	6	4	4,415	6	3	1,129	2	5
CYTOSTATICS	6,739	4	11	3,691	5	15	4,123	8	5
DERMATOLOGICALS	4,877	3	7	2,426	3	2	1,273	2	(2)
BLOOD AGENTS	4,484	3	25	2,730	4	14	3,341	6	3
SENSORY ORGANS	2,917	2	12	1,462	2	8	1,609	3	1
DIAGNOSTIC AGENTS	2,471	1	10	1,329	2	9	1,925	4	10
HORMONES	2,356	1	18	1,326	2	4	1,088	2	0
MISCELLANEOUS	1,693	1	0	535	1	4	1,370	3	2
HOSPITAL SOLUTIONS	5	0	39	144	0	6	1,752	3	(3)
PARASITOLOGY	196	0	11	122	0	1	4	0	4

+: 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 January 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.***