

RX TO OTC...

PHARMACEUTICAL INSIGHTS FROM ALL POINTS OF VIEW

DEAR HEALTHCARE PROFESSIONAL

IMS Japan and ACNielsen Japan are pleased to be joining together in an exciting partnership to revolutionize marketing and sales force information services for Consumer Health in Japan. For the first time ever, clients will have access to integrated solutions that provide the most comprehensive view of pharmaceutical product performance in Japan...from Rx to OTC.

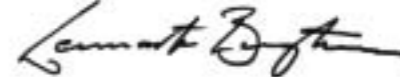
By combining IMS's Global Pharmaceutical and Consumer Health expertise with ACNielsen's insights about fast moving consumer goods worldwide, we'll deliver actionable solutions with the most complete picture of marketplace dynamics...everything you need to manage your marketing mix, extend your brand's performance and optimize your sales force effectiveness...at every stage of your product's lifecycle and through virtually every part of the supply chain.

With 130 combined years of global expertise and data assets in the pharmaceutical and OTC business, IMS and ACNielsen bring together a depth and breadth of knowledge unmatched in this industry. We look forward to demonstrating our expertise and showing you how the power of two global leaders can help you maximize product performance in Japan's Consumer Health market.

Best regards,



Ted Saeki
President & Representative Director
IMS Japan K.K



Lennart Bengtsson
Managing Director
ACNielsen Japan

About IMS Japan



Operating in more than 100 countries, IMS is the world's leading provider of information solutions to the pharmaceutical and healthcare industries. With 50 years of industry experience, we offer leading-edge business intelligence products and services that are integral to clients' day-to-day operations, including marketing effectiveness solutions for prescription and over-the-counter pharmaceutical products; sales optimization solutions to increase pharmaceutical sales force productivity; and consulting and customized services that turn information into actionable insights. IMS Japan K.K. has been providing information services to the pharmaceutical industry since 1964. Additional information is available at: <http://www.ims-japan.co.jp> (Japan) or <http://www.imshealth.com> (Corporate)
Tel: +81-3-3481-3581
Fax: +81-3-3481-3591

About ACNielsen Japan



ACNielsen, a VNU company, is the world's leading marketing information company. Offering services in more than 100 countries, the company provides measurement and analysis of marketplace dynamics and consumer attitudes and behavior. Clients rely on ACNielsen's market research, proprietary products, analytical tools and professional service to understand competitive performance, to uncover new opportunities and to raise the profitability of their marketing and sales campaigns. ACNielsen has been providing retail measurement and customized research services to clients in Japan since 1959. Additional information is available at: <http://www.acnielsen.co.jp>
Tel: +81-3-5573-9384



Complete Consumer Health Intelligence from
IMS and ACNielsen





THE OTC MARKET: AROUND THE CORNER, AROUND THE WORLD, IT'S GROWING

The global Consumer Health market is one of constant evolution. Over the last 20 years, the movement from prescription to OTC and shift from OTC to Mass Market have rapidly progressed. At an estimated ¥827 billion annually, the Consumer Health market in Japan is showing all the early signs of the rapid expansion seen elsewhere in the world.

CONSIDER THE FACTS:

- > The Japanese government is looking at ways to accelerate the product registration process and relax its rules for advertising and promotion.
- > The population in Japan is aging rapidly and by 2020, one in four citizens will be over the age of 65. This will place an enormous financial burden on the healthcare system. But it may also create opportunities for the government to encourage seniors to purchase OTC products.
- > Ethical to OTC switches are becoming more common in a global market, as companies develop strategies to extend the value of brands facing patent expiration.
- > And more and more, Japanese consumers are demanding a greater variety of product choices.

The Consumer Health business in Japan will be changing (and growing) and for pharmaceutical manufacturers like you, this expansion requires staying ahead of the curve with comprehensive tools and analyses to track and evaluate this fluid market...from movements in ethical to expansion into OTC. **Without access to reliable and detailed insights now, your next strategic move may come just a little too late.**

AT ISSUE

There's no question you face many business issues in this highly competitive market. The question is: "what information services partner is most qualified to help you attack your challenges with completely integrated business solutions?"

IMS and ACNielsen are global leaders that offer you end-to-end solutions starting with the prescription market straight through to the consumer health business. And on either side of the business, how well you manage your people, your products, your promotion and the return on your investment is what ensures your future success.

With complete and integrated Consumer Health solutions, IMS and ACNielsen can get to the heart of understanding **and solving** your business issues...working as partners to help you:

- > Effectively measure the performance of your MRs.
- > Determine your market share and ways to drive growth.
- > Understand what's happening to your stock levels in the Wholesaler and Pharmacy channels.
- > Develop effective pricing strategies for your various channels.
- > Evaluate the impact of competitive launches.
- > Analyze which promotional methods are the most effective.
- > Target the pharmacies with the greatest impact on your business.
- > Understand how and when to switch your brand to OTC.



IMS and ACNielsen...The Power of Two

IMS and ACNielsen are global players who know your market and the world market. With 130 combined years of best-in-class knowledge of the pharmaceutical and OTC business, we are uniquely qualified to deliver value-added Consumer Health services and insights to you. Our marketplace intelligence and perspectives can't be matched.

Only IMS and ACNielsen can provide **both**:

- > **Wholesale Sales Into Pharmacy (JRSR – IMS)**
- > **Retail Sales Out of Pharmacy (Scantrack – ACNielsen)**

Only with access to this combined data, experience and knowledge can you answer business issues like:

- > How do I maximize my brand sales?
- > How do I measure my MRs?
- > How effective is my promotion?
- > How are my competitors doing?
- > What is happening to my stock levels in Wholesale/Pharmacy?

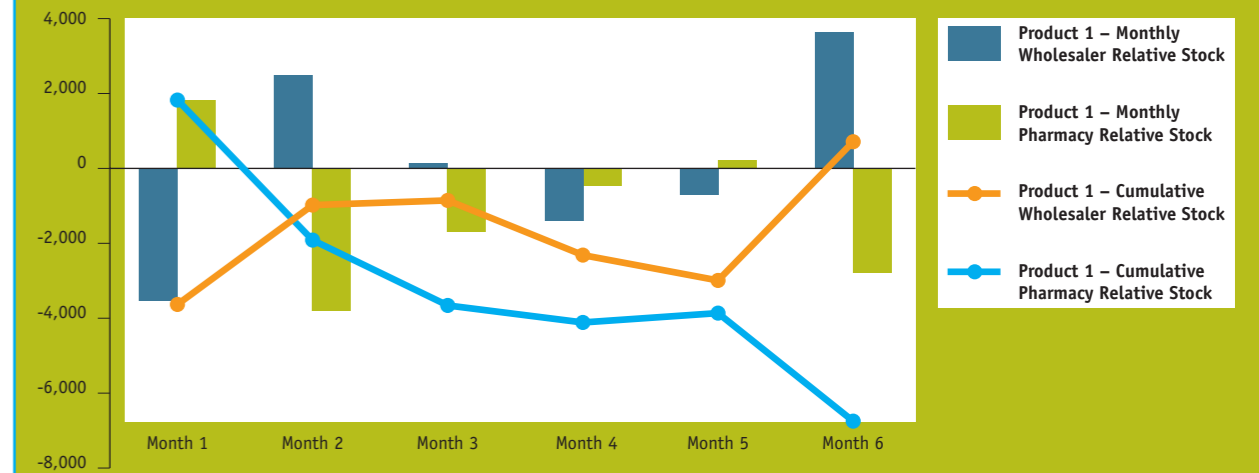
We start by combining our assets – “sell in” and “sell out” information available nowhere else as an integrated solution, but essential to giving you the **complete** picture of the market – capturing all the influencers at every strategic point in your product's lifecycle.

Then, we overlay that information with our unique perspectives – applying decades of pharmaceutical knowledge, analytical and consulting expertise, and unmatched experience in sales force effectiveness, pricing, forecasting and promotion. The end product...**a full service solution that turns our combined marketplace intelligence into navigational insights that deliver results for you.**

MAKING IT REAL

Telling you that IMS and ACNielsen offer an integrated Consumer Health solution wrapped around our consulting and analytical expertise is not enough. Putting it into practice is what matters. Consider the real life example below...

Wholesaler and Pharmacy Stock Relative Position



Here, the key to the IMS/ACNielsen analysis was to help this client prevent lost sales through “Out of Stocks” in the supply chain. While absolute stock levels cannot be measured, we can monitor the relative stock movement, compare it with the previous period for both Wholesale and Pharmacy and show the client whether stock levels have increased or decreased. The plotting of cumulative figures over time offers clients greater visibility to critical information.

In this example for Product 1, the monthly stock impact seems to be very variable, but the cumulative position worsens over the period. This may be caused by supply issues from the manufacturer but more likely comes from competitive activity.

As the position in Pharmacy worsens, “Out of Stocks” are likely to occur. In the last month, the position in the Wholesaler seems to be addressed, while the position in Pharmacy continues to decline. This may have been made worse by Wholesalers not having stock when it was needed.

With “sell in” and “sell out” information and value-add consulting from IMS and ACNielsen we can help you stay in control of the supply of your product in the market. Generating customer demand but failing to fulfill it because your product is “Out of Stock” is a terrible waste of resource. Once a customer switches to another product, you may never be able to get that customer back.

SOLUTIONS THAT WORK FOR YOU

What matters most in business is the ability to understand the market, what drivers most influence product uptake, and how to quickly adjust your strategies to improve performance. **IMS and ACNielsen provide you with answers, not just the data...**because in the end, what counts is giving you a complete roadmap to solve your business issue.

For more information on how IMS and ACNielsen can help you grow your ethical and consumer businesses, give us a call. You'll be glad you did!