

KEY COUNTRY DRUG PURCHASES - RETAIL PHARMACIES

IMS HEALTH - RETAIL DRUG MONITOR: 12 MONTHS TO FEB 2003

	12 MONTHS FEB 2003 US\$ MILLIONS	12 MONTHS FEB 2002 US\$ MILLIONS	% GROWTH AT CONSTANT US\$ EXCHANGE*	% GROWTH AT CONSTANT EXCHANGE*
SELECTED WORLD	281,175	258,751	9	6
NORTH AMERICA	156,472	141,821	10	10
U.S.A.	149,200	135,482	10	10
CANADA	7,272	6,339	15	14
EUROPE (leading 5)	62,368	54,111	15	5
GERMANY	18,292	15,377	19	8
FRANCE	15,237	13,769	11	1
ITALY	10,822	9,666	12	2
UNITED KINGDOM	11,143	9,579	16	9
SPAIN	6,874	5,720	20	9
JAPAN (*including Hospital)	48,069	47,167	2	1
LATIN AMERICA (leading 3)	10,851	12,760	(15)	(15)
MEXICO	6,075	5,740	6	6
BRAZIL	3,716	4,101	(9)	(9)
ARGENTINA	1,060	2,919	(64)	(64)
AUSTRALIA/NEW ZEALAND	3,415	2,892	18	8
THERAPEUTIC CATEGORY				
1 CARDIOVASCULAR	54,924	50,389	9	6
2 CENTRAL NERVOUS SYSTEM	49,442	43,970	12	10
3 ALIMENTARY/METABOLISM	41,898	39,196	7	4
4 RESPIRATORY	26,421	24,566	8	5
5 ANTI-INFECTIVES	24,218	23,002	5	3
6 MUSCULO-SKELETAL	17,092	15,914	7	5
7 GENITO-URINARY	15,836	14,884	6	4
8 CYTOSTATICS	12,644	10,683	18	15
9 DERMATOLOGICALS	8,712	8,334	5	2
10 BLOOD AGENTS	9,119	8,058	13	10
11 SENSORY ORGANS	5,649	5,287	7	4
12 DIAGNOSTIC AGENTS	4,983	4,579	9	6
13 HORMONES	4,333	4,133	5	2
14 MISCELLANEOUS	3,685	3,511	5	4
15 HOSPITAL SOLUTIONS	1,816	1,859	(2)	(4)
16 PARASITOLOGY	403	386	4	2

*Constant Exchange takes out the effect of fluctuating exchange rates

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	US		JAPAN		GERMANY		FRANCE		ITALY		UK	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
TOTAL	149,200	10	48,069	1	18,292	8	15,237	1	10,822	2	11,143	9
CARDIOVASCULAR	27,072	9	9,255	0	4,082	4	3,660	(1)	2,713	6	2,739	14
CENTRAL NERVOUS SYST	32,493	12	3,554	13	2,525	11	2,446	3	1,416	7	2,187	11
ALIMENTARY/MET.	21,868	8	7,167	(2)	2,872	6	2,285	3	1,553	2	1,716	7
ANTI-INFECTIVES	12,407	10	5,321	(0)	1,385	4	1,349	(10)	1,045	(7)	403	(5)
RESPIRATORY	15,191	9	3,467	3	1,452	5	1,335	(1)	921	(3)	1,326	3
MUSCULO-SKELETAL	8,990	10	3,111	(2)	899	8	885	3	632	(2)	603	14
GENITO-URINARY	9,643	6	1,008	2	1,058	4	942	2	661	3	629	4
CYTOSTATICS	5,676	19	3,667	13	1,213	22	458	6	462	0	339	6
DERMATOLOGICALS	4,292	7	1,208	(4)	594	1	476	(2)	339	2	418	6
BLOOD AGENTS	3,405	27	3,240	(3)	657	17	496	11	434	(9)	210	30
SENSORY ORGANS	2,461	10	1,493	(2)	290	8	313	5	244	5	191	4
DIAGNOSTIC AGENTS	2,088	14	1,629	(6)	483	14	228	10	168	15	178	18
HORMONES	1,926	9	1,011	(5)	376	6	255	(5)	175	(4)	122	4
MISCELLANEOUS	1,525	5	1,255	2	311	30	64	(7)	35	7	27	(17)
HOSPITAL SOLUTIONS	1	32	1,679	(5)	71	28	16	12	18	2	11	3
PARASITOLOGY	162	2	4	5	24	7	29	8	6	(5)	44	17
	CANADA		SPAIN		BRAZIL		MEXICO		ARGENTINA		AUST./NZ	
	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+	\$M	+
TOTAL	7,272	14	6,874	9	3,716	(9)	6,075	6	1,060	(64)	3,415	8
CARDIOVASCULAR	1822	17	1600	11	488	-10	517	8	183	-63	794	8
CENTRAL NERVOUS SYST	1405	18	1345	15	535	-9	725	6	196	-59	615	6
ALIMENTARY/MET.	1068	14	907	3	637	-9	1133	6	177	-64	517	11
ANTI-INFECTIVES	387	6	420	-4	258	-15	963	2	90	-67	190	8
RESPIRATORY	537	7	678	4	365	-13	692	6	79	-66	378	3
MUSCULO-SKELETAL	485	13	380	6	301	-8	515	13	80	-66	212	13
GENITO-URINARY	385	8	414	15	433	-9	436	7	78	-64	149	2
CYTOSTATICS	318	21	303	19	34	37	43	15	7	-77	125	13
DERMATOLOGICALS	265	11	233	3	311	-7	359	6	59	-66	158	2
BLOOD AGENTS	164	29	249	18	58	-3	107	18	23	-56	75	28
SENSORY ORGANS	128	8	163	15	112	-7	143	12	32	-64	78	7
DIAGNOSTIC AGENTS	156	13	1	-10	5	-5	9	12	7	-63	30	6
HORMONES	58	17	167	2	84	-9	114	6	27	-60	17	11
MISCELLANEOUS	80	-4	8	79	46	2	255	-8	16	-62	62	14
HOSPITAL SOLUTIONS	2	7	3	1	3	-27	11	-12	1	-64	1	3
PARASITOLOGY	12	22	3	42	46	-11	53	6	5	-62	14	4

+: Growth is at Constant Exchange

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	NORTH AMERICA			EUROPE TOP FIVE			JAPAN		
	\$M	%	+	\$M	%	+	\$M	%	+
CARDIOVASCULAR	28,893	19	10	14,794	24	6	9,255	19	0
CENTRAL NERVOUS SYSTEM	33,898	22	12	9,919	16	9	3,554	7	13
ALIMENTARY/METABOLISM	22,935	15	9	9,332	15	4	7,167	15	(2)
ANTI-INFECTIVES	12,794	8	9	4,602	7	(4)	5,321	11	0
RESPIRATORY	15,728	10	9	5,712	9	2	3,467	7	3
MUSCULO-SKELETAL	9,475	6	10	3,398	5	5	3,111	7	(2)
GENITO-URINARY	10,028	6	6	3,704	6	4	1,008	2	2
CYTOSTATICS	5,993	4	19	2,775	5	13	3,667	8	13
DERMATOLOGICALS	4,557	3	7	2,060	3	2	1,208	3	(4)
BLOOD AGENTS	3,570	2	27	2,046	3	10	3,240	7	(3)
SENSORY ORGANS	2,589	2	10	1,202	2	7	1,493	3	(2)
DIAGNOSTIC AGENTS	2,244	1	14	1,059	2	14	1,629	3	(6)
HORMONES	1,985	1	10	1,095	2	1	1,011	2	(5)
MISCELLANEOUS	1,605	1	4	446	1	18	1,255	3	2
HOSPITAL SOLUTIONS	3	0	16	118	0	18	1,679	4	(5)
PARASITOLOGY	174	0	3	107	0	11	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 international 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 March 2002 through to February 2003.

- 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.
- 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.
- United States sales data for 2001 reflect 53 weeks of U.S. sales data instead of 52 weeks, an adjustment that is made every five years to bring IMS's data tracking methodology into line with the calendar year and ensure the most accurate sales volume tracking. As a result, U.S. figures for 2001 incorporate five additional days of sales. Details from the IMS Health Service Centre: service@imshealth.com

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