

Therapeutic Trends

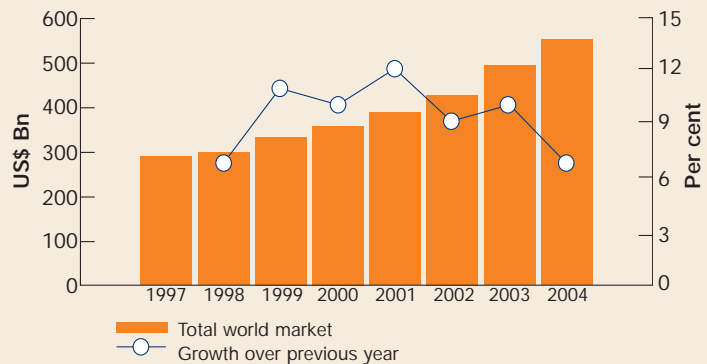
IMS Intelligence.360 Global Pharmaceutical Perspectives

Insight and Outlook from IMS Health

“IMS Intelligence.360” is a comprehensive publication that takes a look back and ahead at the events that may alter the pharmaceutical landscape. Therapeutic Trends is glad to bring you an excerpt from “IMS Intelligence.360.”

In the broadest sense, 2004 was a positive year in pharma. The size of the global market reached 550 billion dollars (US) and grew 7%, capping a five-year run in which the total market grew at a 10% compound annual rate. This size and growth reflect both the ongoing demand for pharmacotherapy and the introduction of innovative drugs. While the cost of pharmacotherapy is typically less than 15% of total health-care spending on a national basis, it is also viewed as the most cost-effective form of intervention, after diet and exercise, for a very broad range of medical conditions. Its effectiveness in preventive care, and for an increasing number of acute and chronic care conditions, is increasingly evident.

GLOBAL PHARMACEUTICAL SALES 1997-2004



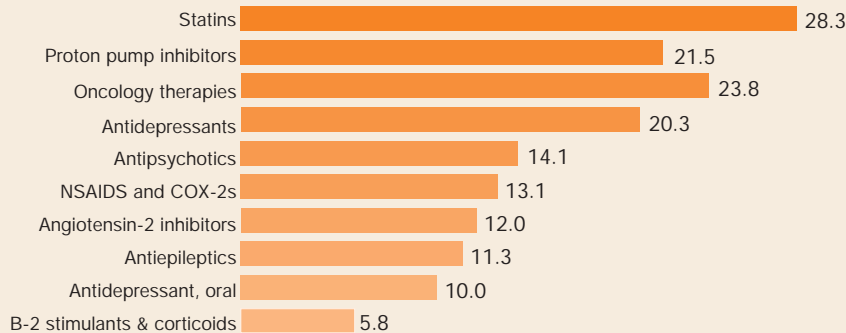
Global Sales US\$ Bn	1997	1998	1999	2000	2001	2002	2003	2004
Total world market (US\$)	\$289	\$297	\$332	\$357	\$387	\$426	\$493	\$550
Growth over previous year (Constant US\$)		7%	11%	10%	12%	9%	10%	7%

At \$11.3 billion (US\$), Canada was ranked 8th among the world's top 10 pharmaceutical markets in 2004.

Source: IMS Health Global Pharma Forecast (includes IMS Audited and Unaudited Markets)

Among all therapy classes, a relatively small number have become super drivers of growth, with medications aimed at life-threatening diseases, chronic illnesses

SELECTED THERAPY CLASSES (WORLDWIDE)



2004 % Growth Constant \$	Leading two corporations in class
11.9	Pfizer; Merck
3.1	AZ; Wyeth
16.9	Roche; SA
1.3	Wyeth; Pfizer
12.0	Lilly; J&J
3.3	Pfizer; Merck
22.1	Novartis; Merck
17.6	Pfizer; J&J
8.0	Takeda; GSK
23.8	GSK; AZ

Source: IMS Health Midas®, 2004

TOP 10 BRANDS BY GLOBAL PHARMA SALES IN 2004

Leading Brands	2004 Global sales		% Growth Constant \$	
	US\$ Bn	% Global Sales	2004	CAGR 99-03
01 Lipitor (atorvastatin)	12.0	2.3	13.8	27.4
02 Zocor (simvastatin)	5.9	1.1	-6.4	11.3
03 Plavix (clopidogrel)	5.0	1.0	31.4	56.6
04 Nexium (esomeprazole)	4.8	0.9	25.3	NA
05 Zyprexa (olanzapine)	4.8	0.9	-3.5	25.9
06 Norvasc (amlodipine)	4.8	0.9	1.2	10.3
07 Seretide/Advair (fluticasone+salmeterol)	4.7	0.9	22.5	166.8
08 Erypo (epoetin alfa)	4.0	0.8	-4.1	23.0
09 Ogastron/Prevacid (lansoprazole)	3.8	0.7	-3.5	14.3
10 Effexor (venlafaxine)	3.7	0.7	20.1	37.1
TOTAL Leading 10 brands	\$53.6	10.3%	8.6%	26.8%

Source: IMS Health Midas®, 2004

BRANDS ACHIEVING BLOCKBUSTER STATUS IN 2004

Brand	Molecules	Brand	Molecules
01 Abilify	(aripiprazole)	11 Gemzar	(gemcitabine)
02 Actonel	(risedronae)	12 Glivec	(imatinib)
03 Bextra	(valdecoxib)	13 Lantus	(insulin glarine)
04 Blopress/Atacand	(candesartan cilexetil)	14 Lexapro	(escitalopram)
05 Casodex	(bicalutamide)	15 Lotrel	(amlodipine+benazepril)
06 Cellcept	(mycophenolate mofetil)	16 One Touch Ultra	(blood glucose monitor)
07 Co-Diovan	(valsartan HCTZ)	17 Prograf	(tacrolimus)
08 Combivir	(lamivudine+zidovudine)	18 Valtrex	(valacyclovir)
09 Detrusitol	(tolterodine)	19 Zetia	14.3 (ezetimibe)
10 Eloxatine	(oxaliplatin)	20 Zometa	(zoledronic acid)

BRANDS LOSING BLOCKBUSTER STATUS IN 2004

- 1 Celexa (citalopram)
- 2 Diflucan (fluconazole)
- 3 Premarin (conjugated estrogens)

Blockbuster status denotes brands with > \$1bn global sales. Specialist products are highlighted in black.

Source: IMS Health MIDAS®, 2004

TOP 10 CORPORATIONS BY GLOBAL PHARMA SALES IN 2004

RANKING	2004 Global sales		% Growth Constant \$	
	US\$ Bn	%Global Sales	2004	CAGR 99-03
01 Pfizer	50.9	9.8	4.9	12.3
02 GlaxoSmithKline	32.7	6.3	1.9	9.4
03 Sanofi-Aventis	27.1	5.2	9.1	12.7
04 Johnson & Johnson	24.6	4.7	8.0	16.7
05 Merck & Co	23.9	4.6	3.5	12.4
06 Novartis	22.7	4.4	7.5	11.3
07 AstraZeneca	21.6	4.2	9.3	8.1
08 Roche	17.7	3.4	10.7	8.1
09 Bristol-Myers Squibb	15.5	3.0	-3.2	4.6
10 Wyeth	14.2	2.7	9.8	11.9
TOTAL Top 10 corporations	\$250.9	48.4%	5.8%	10.9%

Source: IMS Health MIDAS®, 2004

where quality of life is significantly impaired, and medical conditions where prevention significantly reduces the risk of long-term morbidities. These diseases, illnesses and medical conditions attract the greatest investment because they offer the greatest potential benefit—the best opportunity for companies and societies to leverage financial and intellectual capital.

What were the most dynamic classes last year and how did they fare in the market? Classes ranged from anti-inflammatory drugs to potent cancer-fighting therapies and

generated nearly a third of all global pharmaceutical sales (see “Selected Therapy Classes”). Over the next four years, these therapy areas will continue to lead the market, contributing a major share to absolute growth and maintaining responsibility for nearly 60% of all the world’s blockbuster drugs. **CPM**

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THERAPEUTIC TRENDS

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