

Disease Dynamics in 2008

Insight and Outlook from IMS Health

IMS Health's annual review of prescribing and diagnoses trends for 2008 reveals the number of retail prescriptions dispensed in Canada grew 7.1% over 2007. Canadian pharmacies dispensed 453 million prescriptions for the 12 month period ending December 2008, reflecting growing demand in consumption.

Generic medications now account for 51.6% of prescriptions filled by Canadians and were responsible for 70% of the incremental growth in prescriptions last year. Prescriptions for generics grew by 15%, in stark contrast with a 3% decline recorded for the brand segment.

LEADING PRESCRIBED CLASSES

As has been the case for the last 15 years, cardiovascular remain Canada's most prescribed class, up 7.8% in prescriptions dispensed (Table 1). Lipitor®, a cholesterol reducer, is the number one product in that class for the fifth year in a row with 14.9 million prescriptions dispensed in 2008. Psychotherapeutics, the second most prescribed class, increased 7.3%. Posting solid growth rates are

neurologicals (e.g., neuropathic pain medication Lyrica® and Alzheimer's drug Aricept®) and gastrointestinal/genitourinary medications (PPIs such as Pantoloc®, Nexium® and Prevacid®). Neurological disorder agents are the fastest-growing of Canada's 10 leading therapeutic classes, increasing 12.1% in 2008.

What were the most dynamic classes last year and how did they fare in the market? The fastest- (Table 2) and slowest-growing (Table 3) classes are ranked according to purchases made by hospitals and

retail pharmacies, with consideration given only to classes larger than \$10 million.

LEADING REASONS FOR VISITING A PHYSICIAN'S OFFICE

In 2008, hypertension remained the most common reason for visiting a physician (20.9 million diagnosed patient visits), followed by routine physical examinations (10.6 million visits). Hypertension has been the main driver of patient visits in Canada for the last decade (Table 4).

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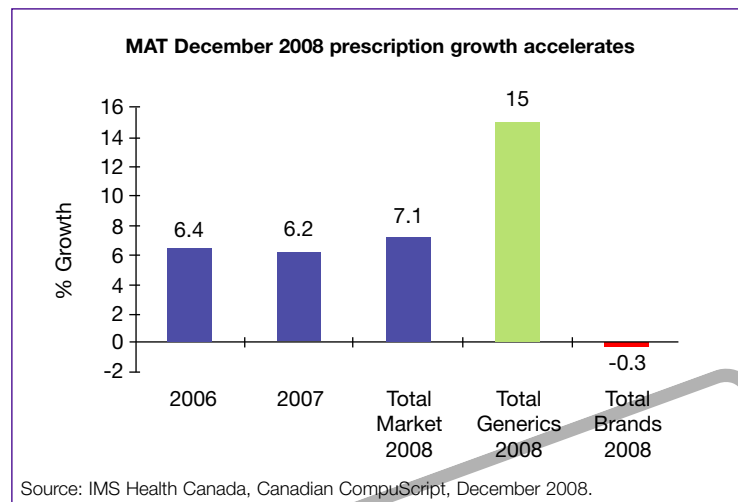


Figure 1. Total prescription growth, full-year 2006 to 2008.

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Table 1
Top 10 therapeutic classes, 2008

Rank 2008	Therapeutic class	TRx 2008 (000s)	TRx % change over 2007	TRx \$\$ 2008 (000s)
1	Cardiovasculars	70,848	7.8	\$3,190,994
2	Psychotherapeutics	57,198	7.3	\$2,235,078
3	Gastrointestinal/genitourinary	30,531	11.7	\$1,816,831
4	Antihyperlipidemic agents	29,549	11.1	\$2,423,588
5	Hormones	25,243	2.5	\$960,165
6	Antiinfectives, systemic	24,495	1.0	\$864,629
7	Analgesics	22,049	7.5	\$953,946
8	Diabetes therapy	19,707	7.7	\$820,260
9	Neurological disorders	18,085	12.1	\$951,891
10	Diuretics	17,079	4.4	\$180,219

Estimated volume and value of prescriptions dispensed in Canadian retail pharmacies.
Source: IMS Health, Canadian CompuScript.

Table 2
10 fastest-growing therapeutic classes, 2008

Rank 2008	Class USC-3	Estimated purchases 2008 (\$000s)	% change vs. 2007
1	Nutrients & supplements	62,349	108.1
2	Ophthalmic preparations	68,572	96.1
3	Antihypertensives	61,727	37.0
4	Smoking deterrents	151,573	35.5
5	Specific antagonists	36,126	30.9
6	Antineoplastics, misc.	612,685	28.6
7	Intra-uterine contraceptives	23,014	27.0
8	Calcium supplements	58,519	23.0
9	Parenteral hematinics	14,659	22.3
10	Gout-specific preparations	19,388	21.8

Includes classes valued at more than \$10M in annual sales.
Source: IMS HEALTH, Canadian Drug Store & Hospital Purchases Audit.



Table 3
10 slowest-growing therapeutic classes, 2008

Rank 2008	Class USC-3	Estimated purchases 2008 (\$000s)	% change vs. 2007
1	Hemostatic modifiers, others	16,470	-32.2
2	Cytostatic antibiotics	28,024	-19.8
3	ACE inhibitors & combinations	595,033	-11.6
4	Diabetes therapy, oral	372,260	-10.6
5	Biologicals, others	42,887	-10.5
6	Hormones, others	18,728	-9.8
7	Oral cold preparations	28,020	-8.4
8	Respiratory vaccines	68,376	-7.9
9	Quinolones	124,310	-7.0
10	Anti-obesity preparations	32,308	-6.3

Includes classes valued at more than \$10M in annual sales.
Source: IMS HEALTH, Canadian Drug Store & Hospital Purchases Audit.

Table 4
Top 10 reasons for physician visits in Canada

1. Hypertension
2. Routine general medical exam
3. Diabetes
4. Depression
5. Anxiety
6. Acute upper respiratory infection
7. Normal pregnancy supervision
8. Hyperlipidemia
9. Otitis media
10. Urinary tract infection

Ranking is based on patient visits to Canadian office-based physicians.
Source: IMS HEALTH, Canadian Disease & Therapeutic Index.

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