

FLASH SALES REPORT– Q3'2005

Saudi Pharma Market (Private)

Source : IMS Q3'05

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Following is the brief report highlighting the developments in the local pharmaceutical market including highlights of SPIMACO performance. All information are based on IMS Quarterly reports unless otherwise indicated. The report covers Private Market unless otherwise stated.

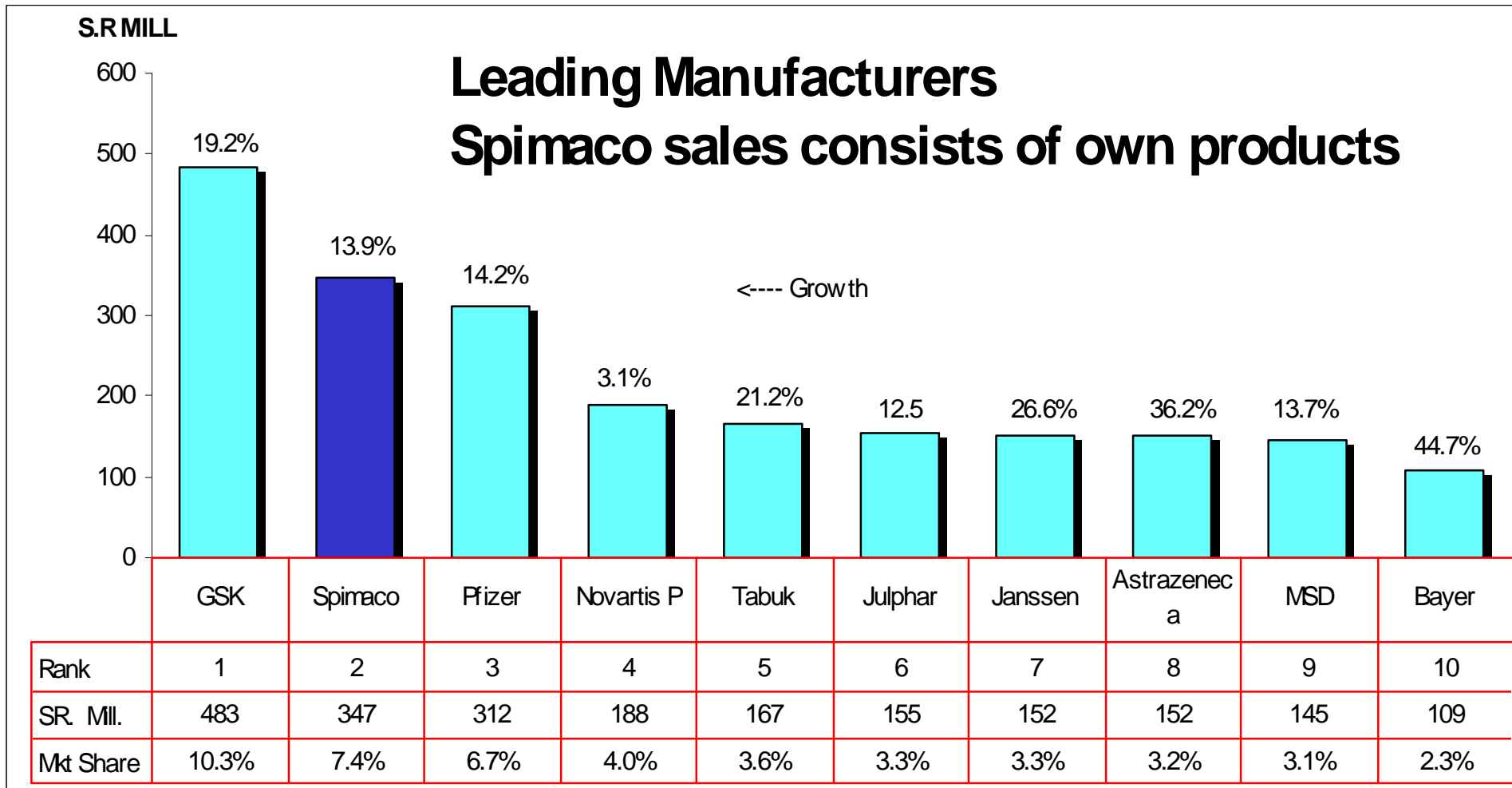
HIGHLIGHTS: -

Marketing & Business Development Deptt.

- . Total sales of the market is SR 4687 Millions with a growth of +17.7%
- . Because of price increase and its cumulative impact, growth rate of Saudi Pharma Market is showing an abnormal increasing trend. In MAT Q3'05 it is 17.7 %.
- . Top ten manufacturers constitute 47.2% of Saudi Pharma (Private) Market
- . Spimaco growth is 13.9% with 2nd position in Saudi Pharma (Private) Market
- . As a result of price increase Lipitor and Voltaren have pushed Snafi from rank 3rd to 5th.

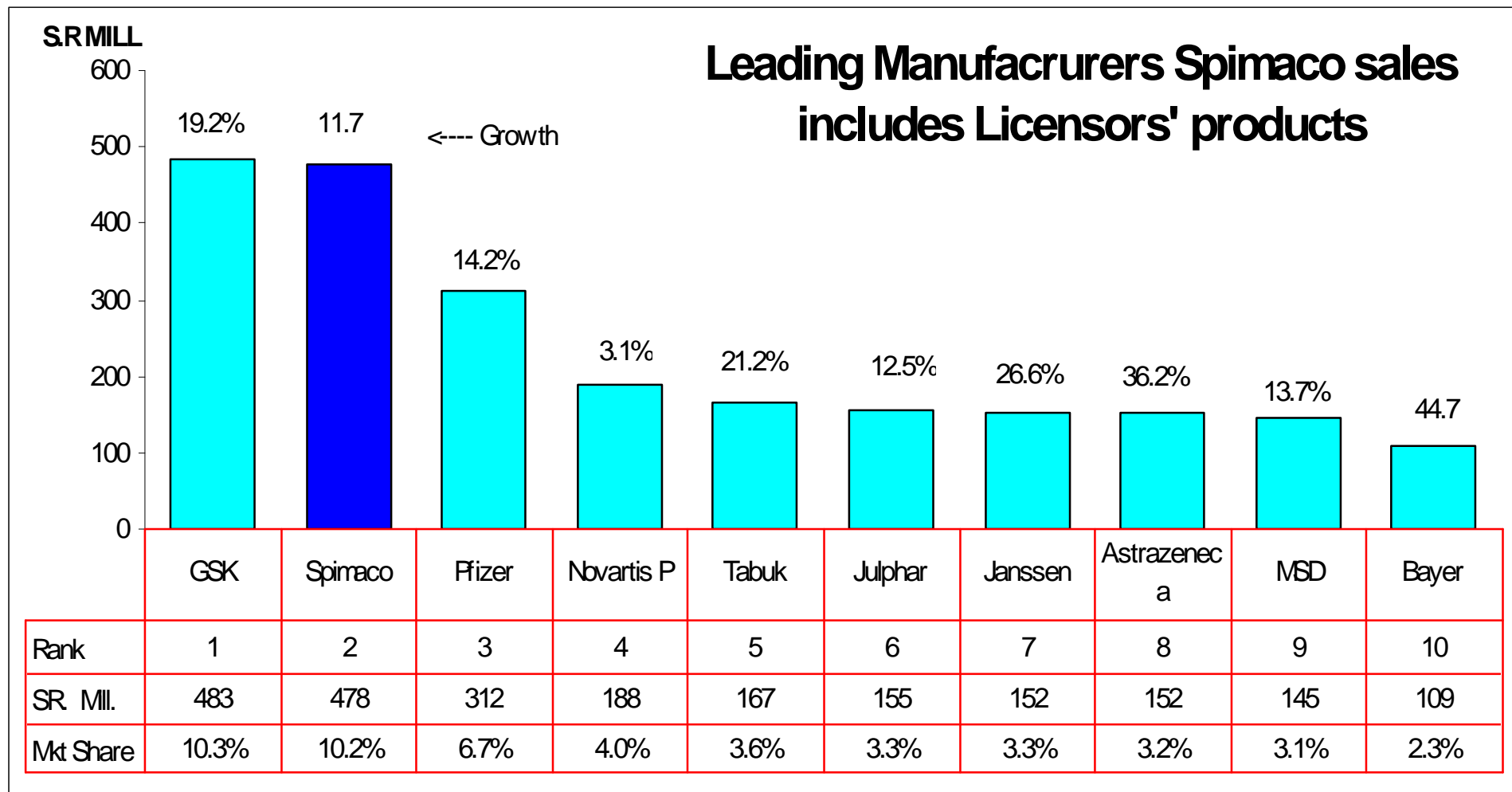
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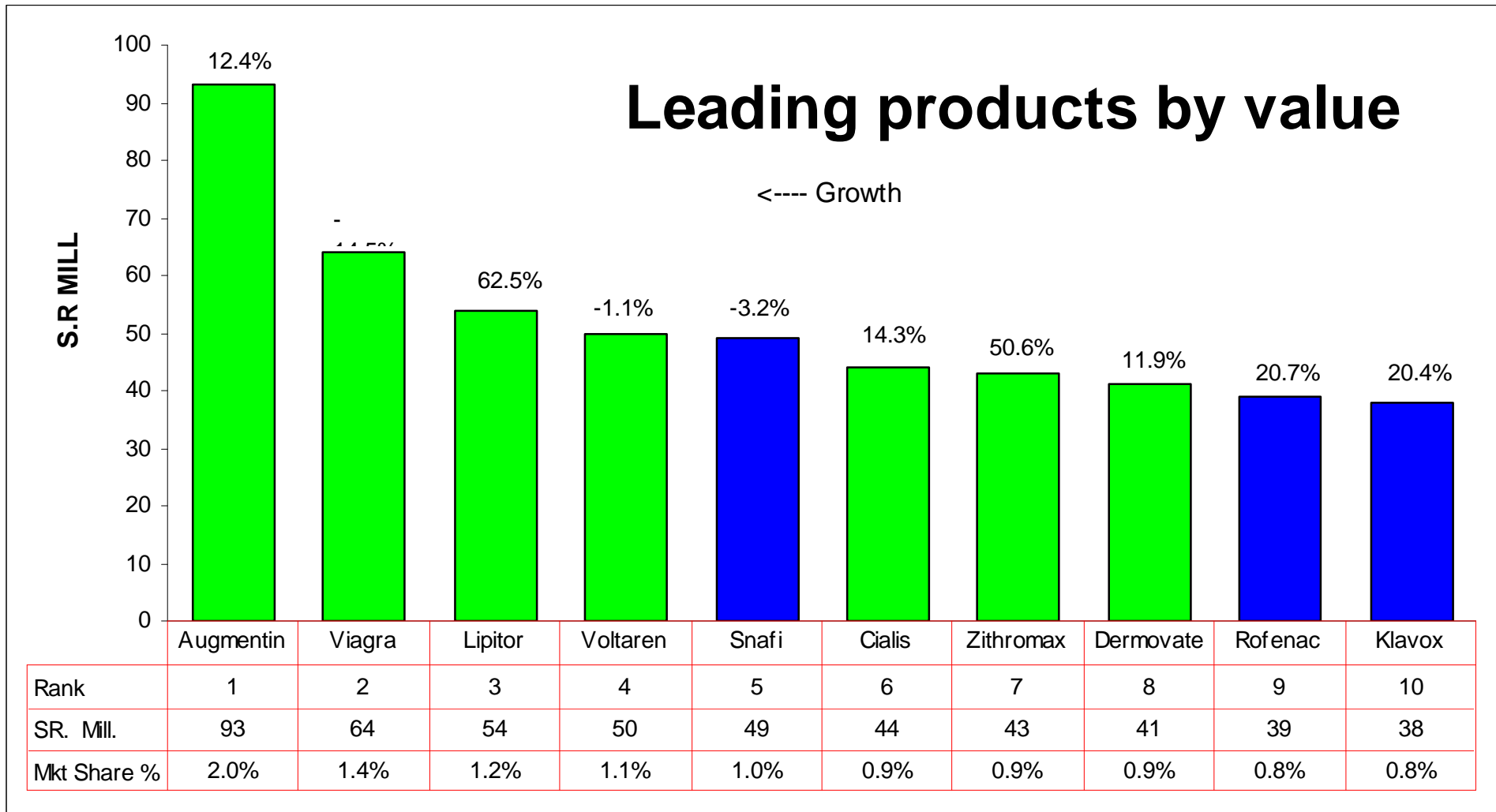
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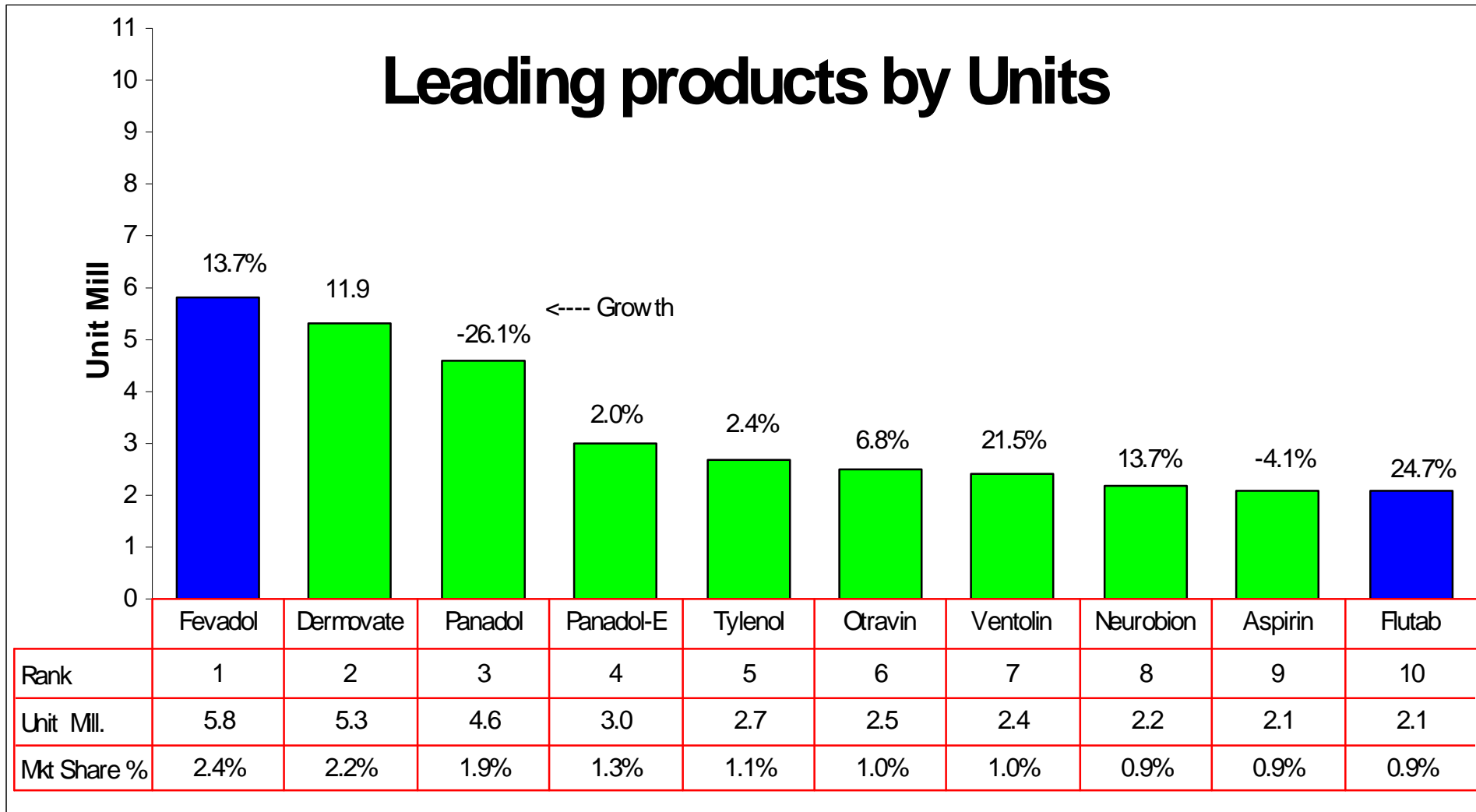
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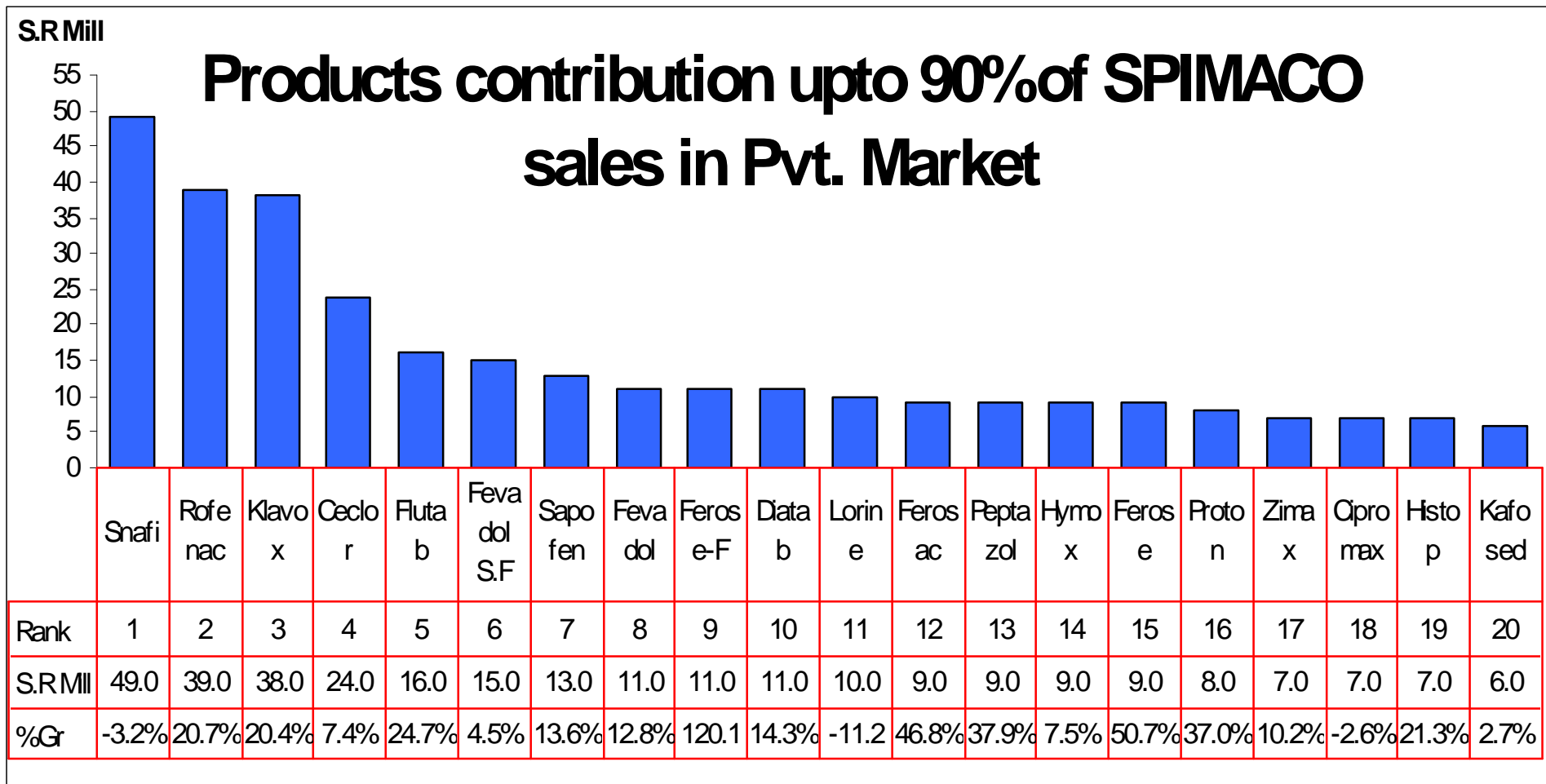
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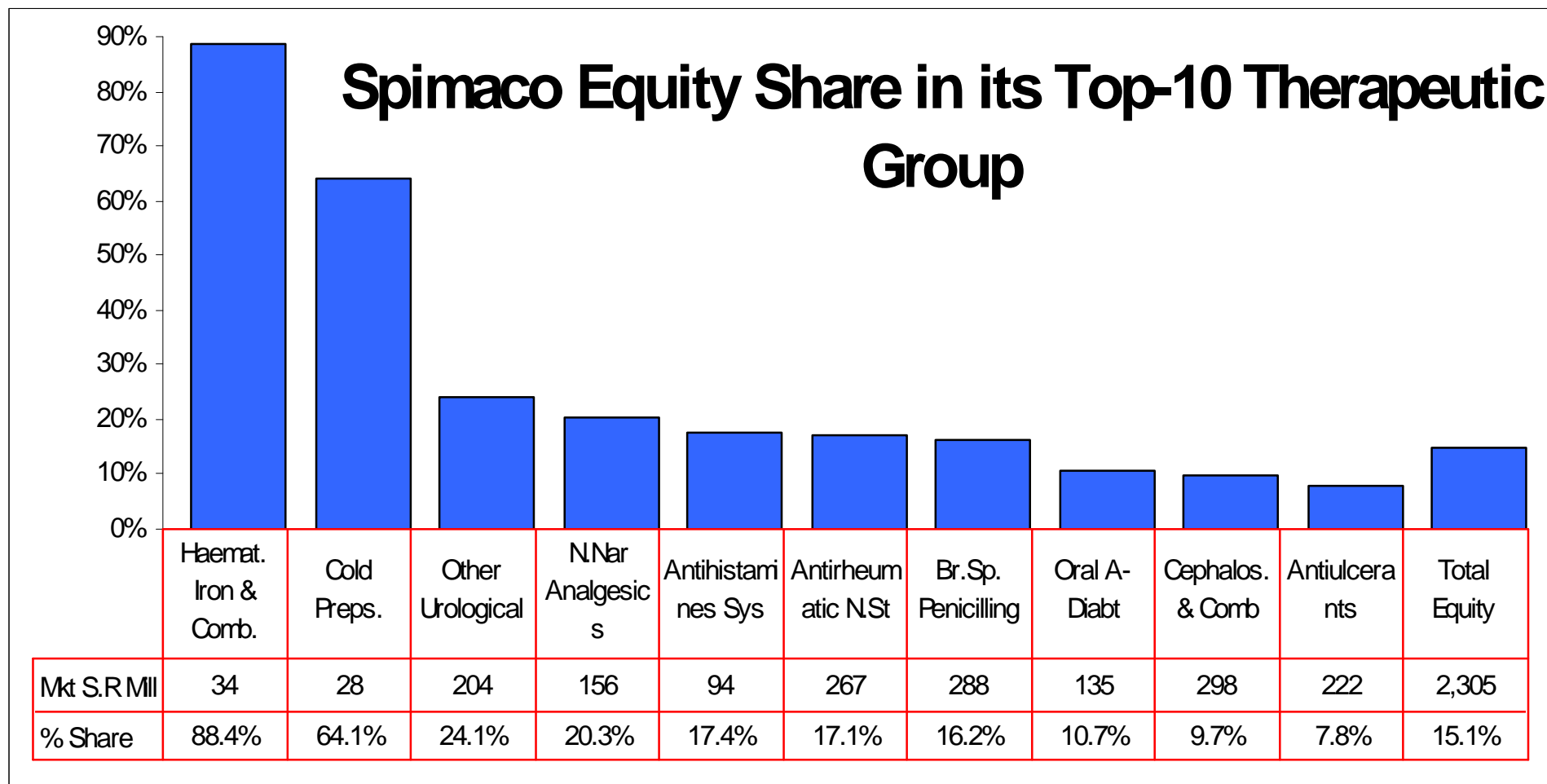
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HIGHLIGHTS:

- SPIMACO became no.2 with licensors' products, reason is price increase in other companies.
- SPIMACO sales grew by SR 42 Mill. Major contributors are as follows:

<u>PRODUCTS</u>	<u>CONT. IN MILL</u>
KLAVOX	7
ROFENAC	6
FEROSE-F	6
FLUTAB	3
FEROSAC	3
FEROSE	3

- Among Top-10 Manufacturers, BAYER is at top in growth 44.7% (34 Mill). Levitra, Ciprobay and Avalox contributed 22, 9 and 7 million respectively.
- By unit Fevadol is No.1 while Flutab is at 10th position. In 1st 10, Flutab is at top in growth i.e 25%.
- In top 10 by value Lipitor, Zithromax and Rofenac are top three in growth i.e 63%, 52% and 22% respectively.
- By value Snafi, Rofenac and Klavox are in Top-10 with position 5th, 9th and 10th likewise.
- Ferose-F and Flutab are leading brand, whereas Ferosac, Snafi, Kafosed, Rofenac Gel, Klavox, Ceclor, Rofenac, and Orasept are 2nd. Zimax, Lorine, Ferose and Cipromax are 3rd leading leading brand in their respective classes.