

FLASH SALES REPORT– Q4'2004

Saudi Pharma Market (Private)

Source : IMS Q4'04

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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.

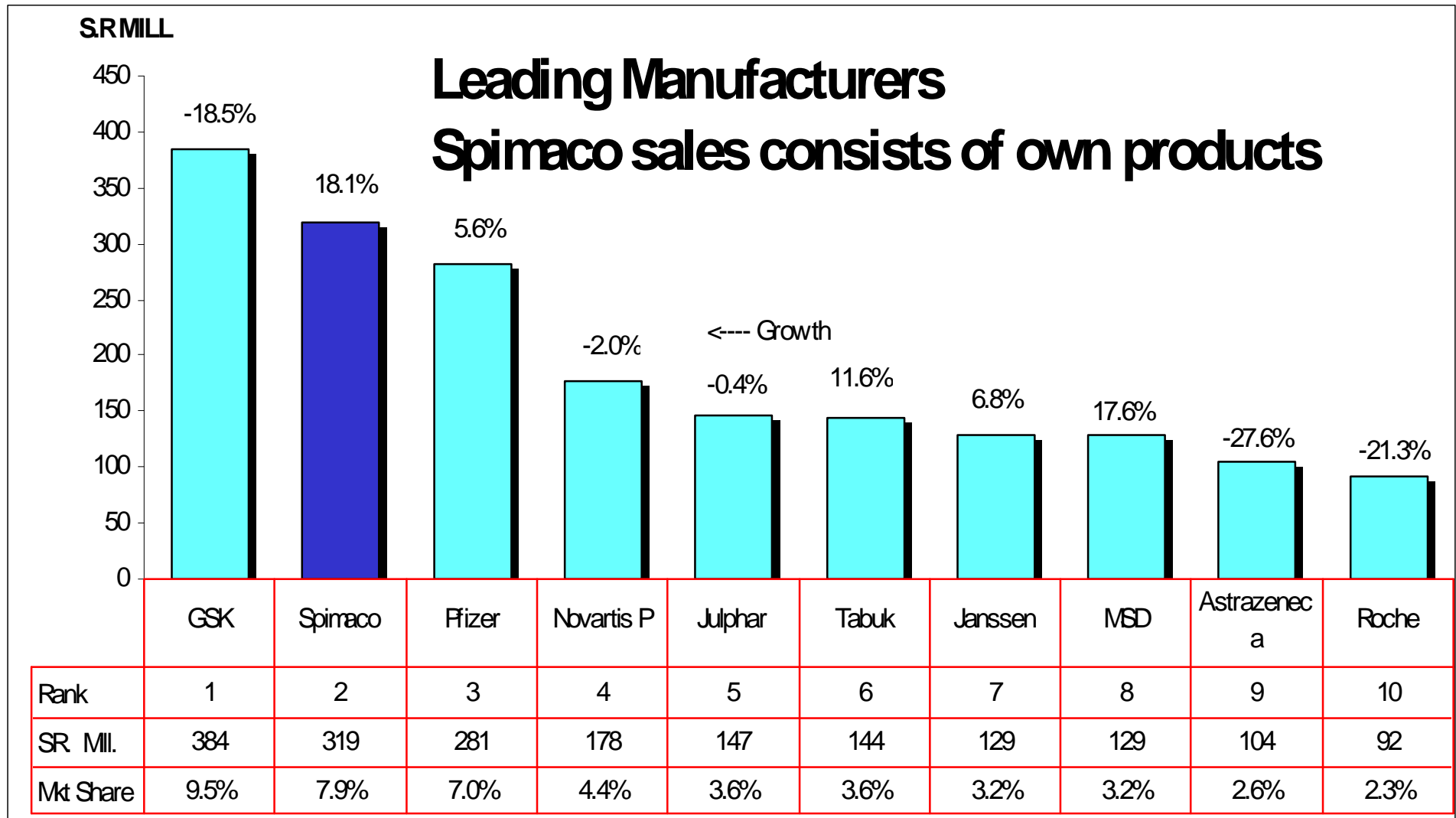
HIGHLIGHTS: -

Marketing & Business Development Deptt.

- . Total sales of the market is SR 4042 Millions with a growth of +4.9%
- . Top ten manufacturers constitute 47.2% of Saudi Pharma (Private) Market
- . Spimaco growth is 18.1% with 2nd position in Saudi Pharma (Private) Market

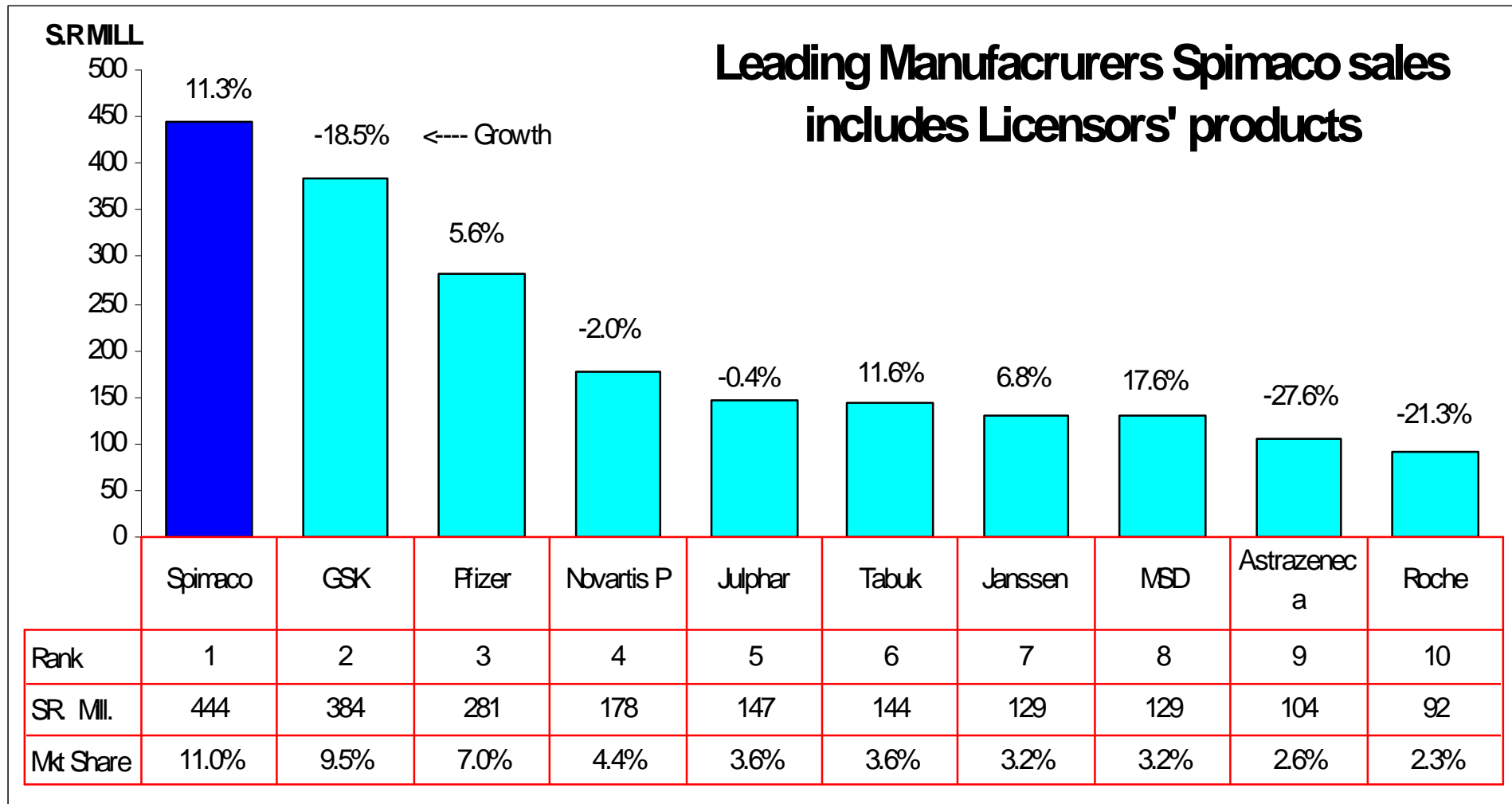
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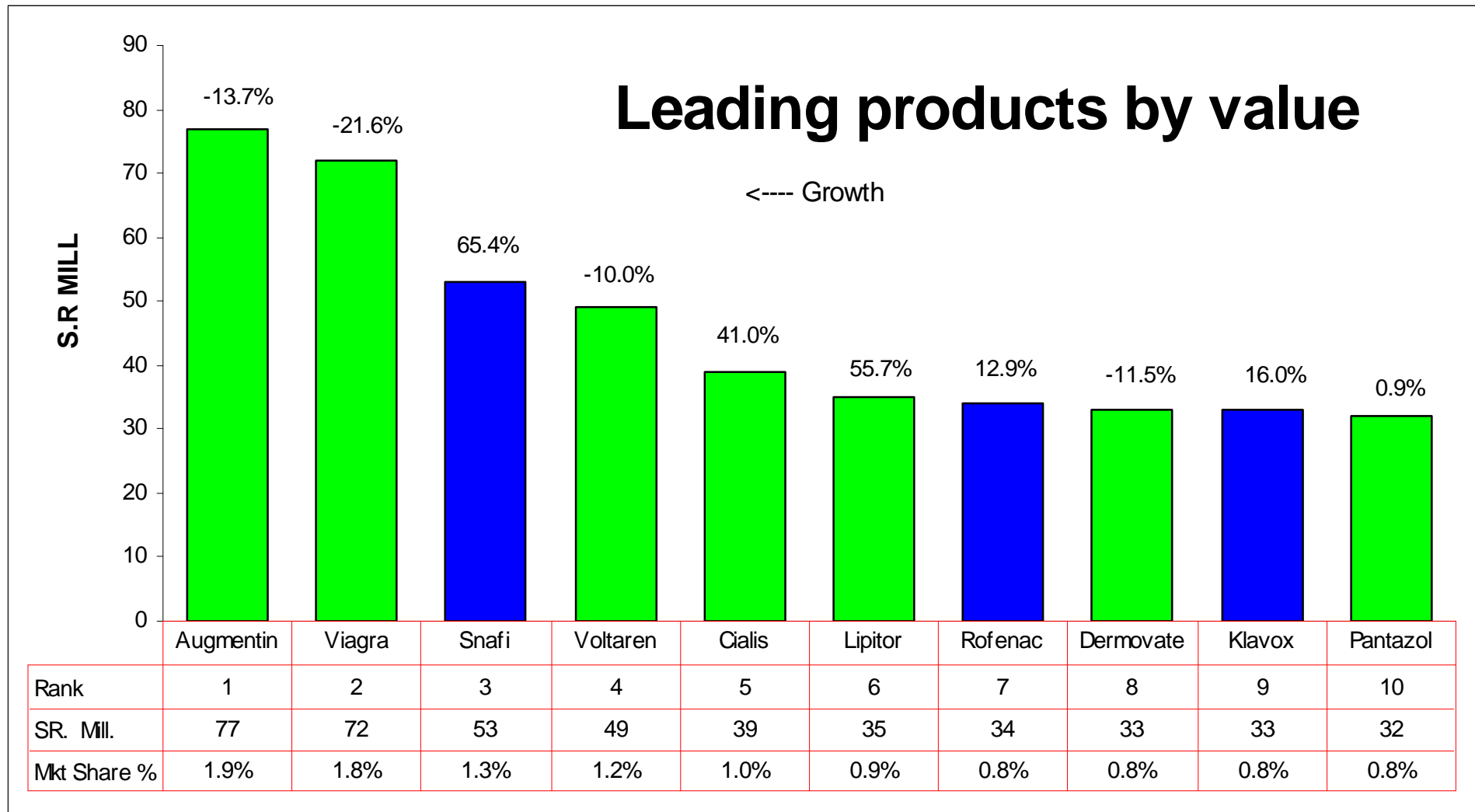
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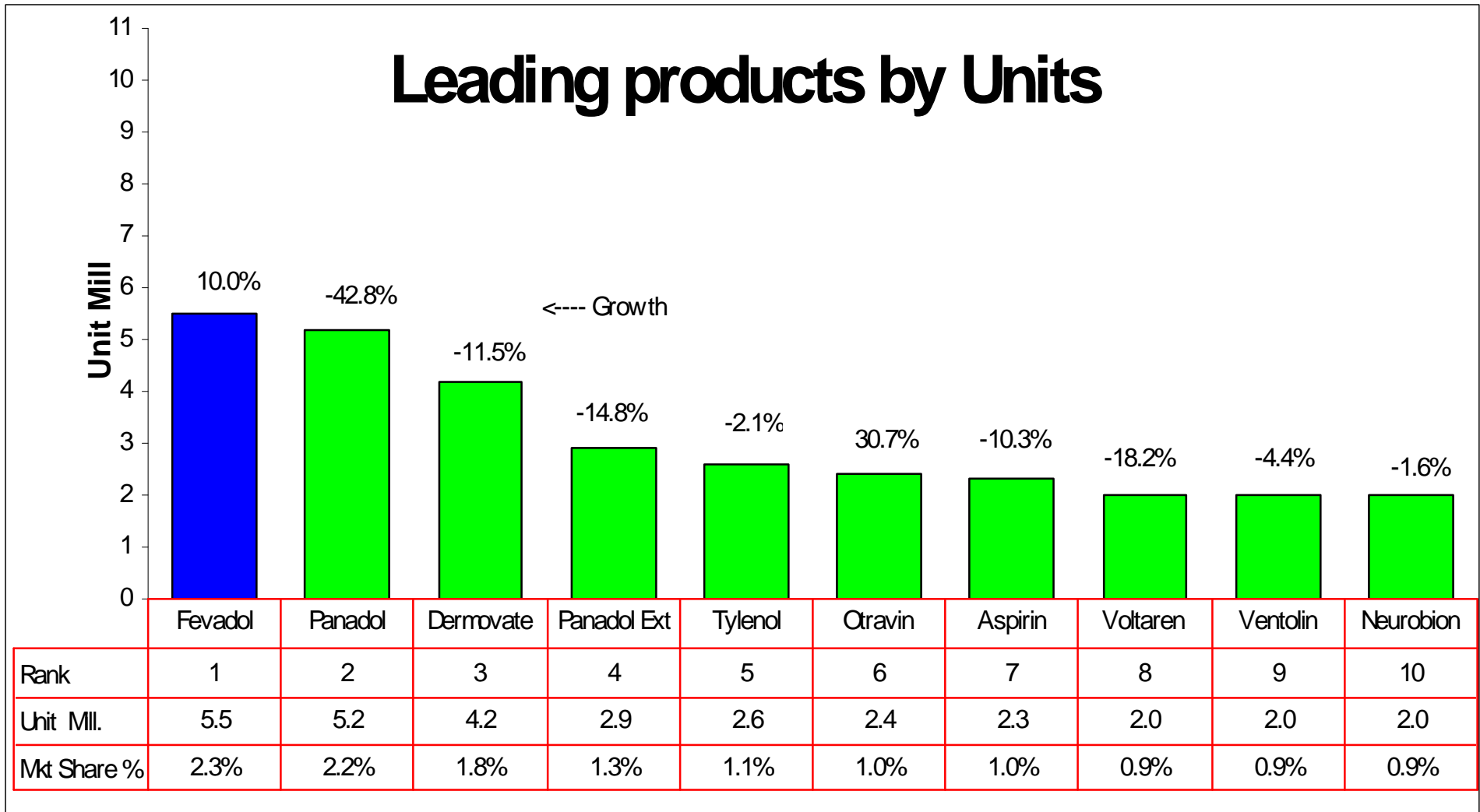
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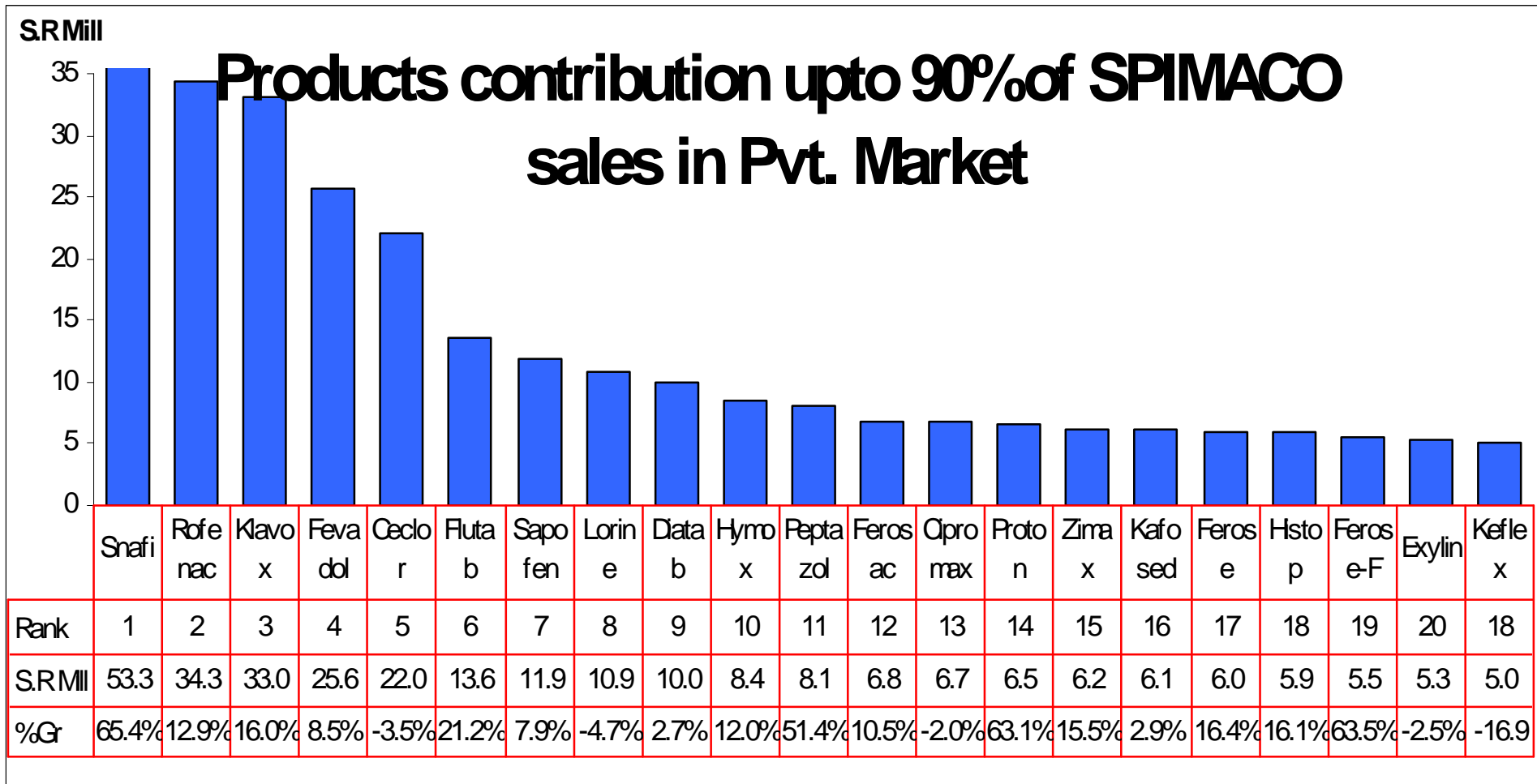
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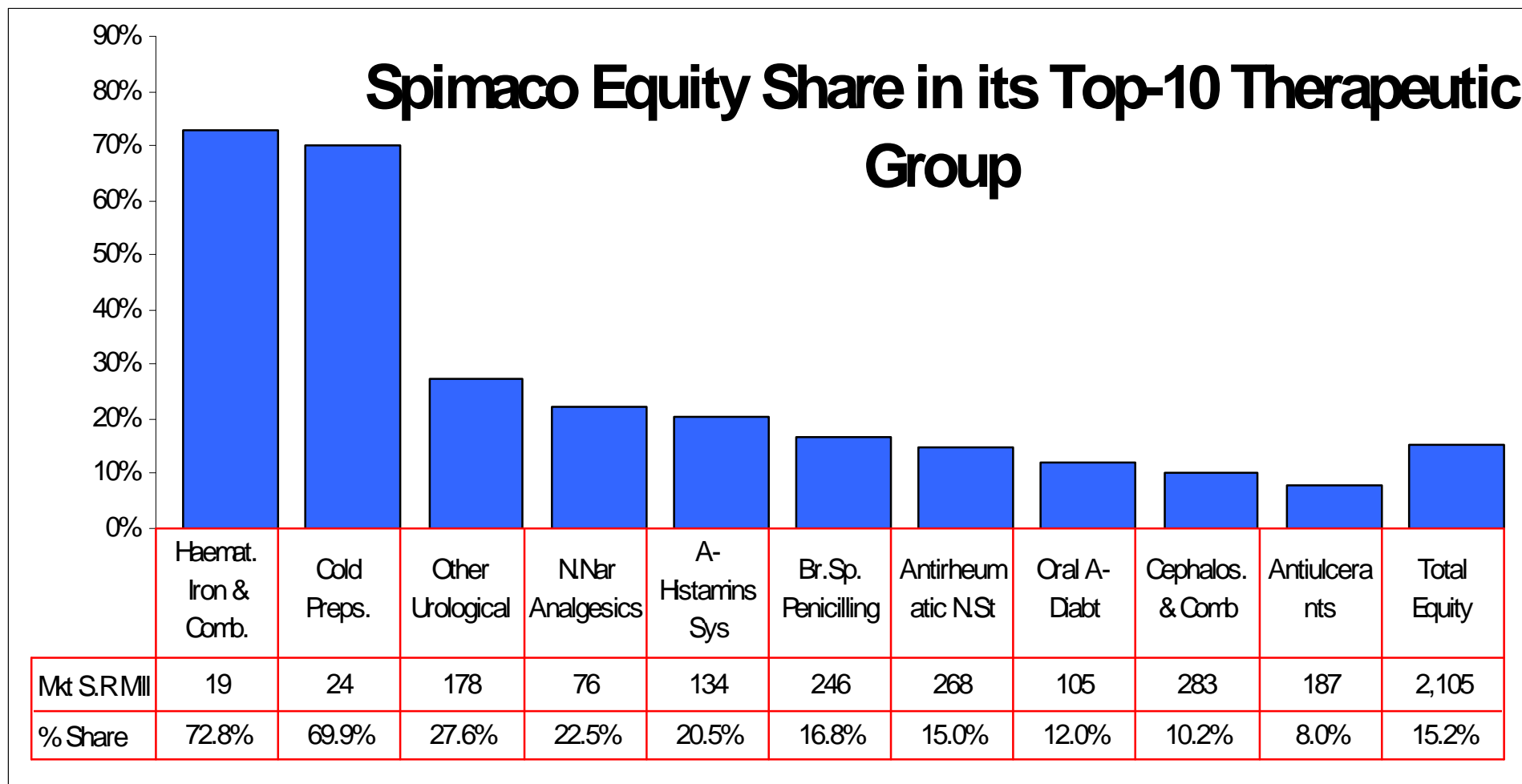
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HIGHLIGHTS:

- With Licensors' SPIMACO is no. 1 in KSA Pharma Market.
- In Top-10 Manufacturers, SPIMACO is fastest growing company with 18.1% growth rate in MAT Q4'04.
- SPIMACO sales grew by SR 49 Mill. Major contributors are as follows:

<u>PRODUCTS</u>	<u>CONT. IN MILL</u>
SNAFI	21.0
KLAVOX	4.6
ROFENAC	3.9
PEPTAZOL	2.8
PROTON	2.5
FLUTAB	2.4
FEROSE-F	2.1

- In Top-10 Manufacturers, 5 companies are in decline. Out of them 4 are multinationals.
- Fevadol attained no.1 position by unit in MAT Q4'04 Private Market KSA.
- By value Snafi, Rofenac and Klavox are in Top-10 products with +ve growth.
- Ferosac and Flutab are leading brand, whereas Snafi, Kafosed, Rofenac Gel, Klavox, Ceclor, Lorine, Ferose and Orasept are 2nd. Sinofree, Rofenac, Zimax, Ferose-F, Fusiderm, Cipromax and Fevadol S. F are 3rd leading brand in their respective classes.