

FLASH SALES REPORT– Q1'2005

Saudi Pharma Market (Private)

Source : IMS Q1'05

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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.

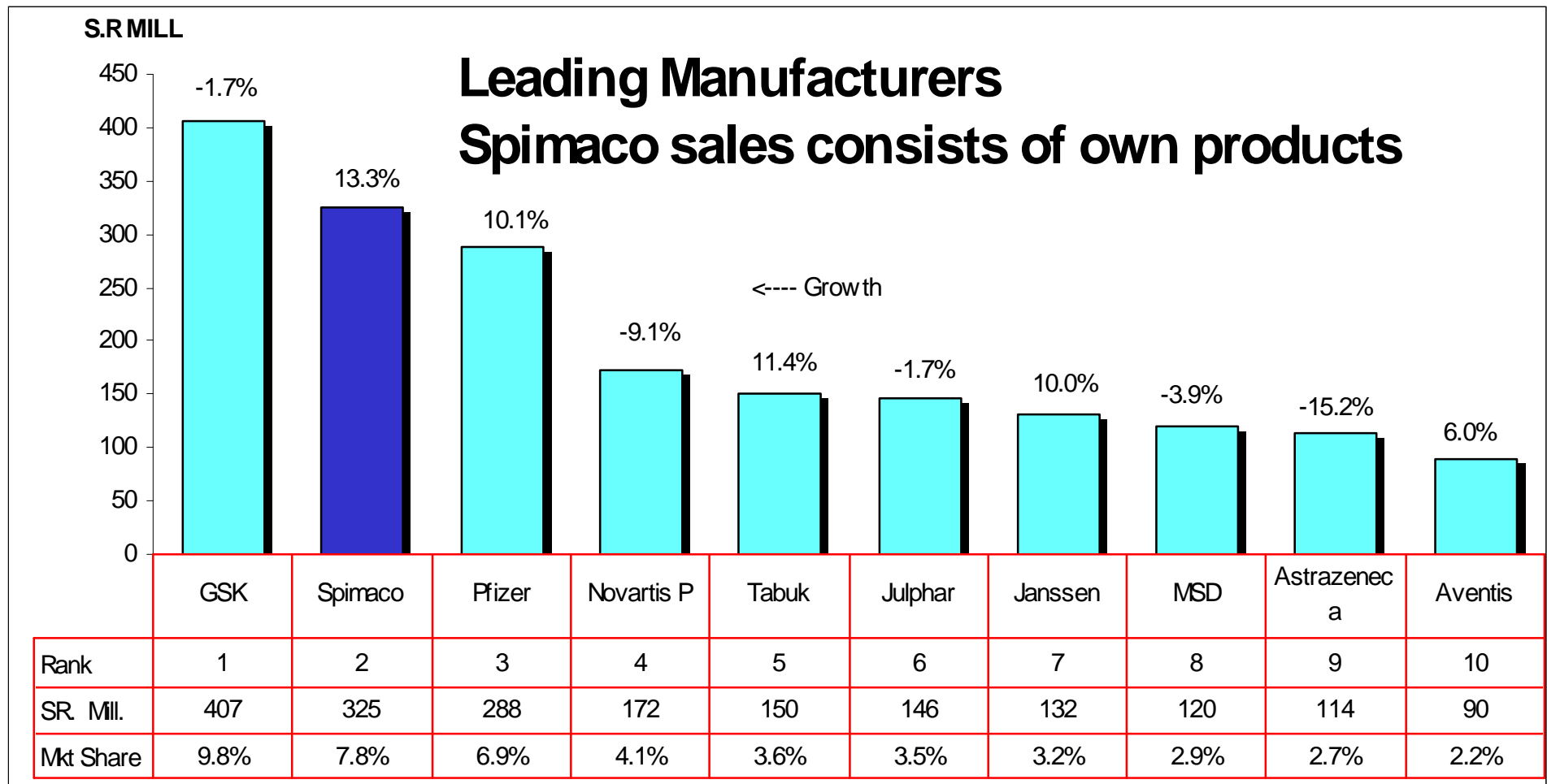
HIGHLIGHTS: -

Marketing & Business Development Deptt.

- . Total sales of the market is SR 4168.4 Millions with a growth of +7.2%
- . Top ten manufacturers constitute 46.7% of Saudi Pharma (Private) Market
- . Spimaco growth is 13.3% with 2nd position in Saudi Pharma (Private) Market

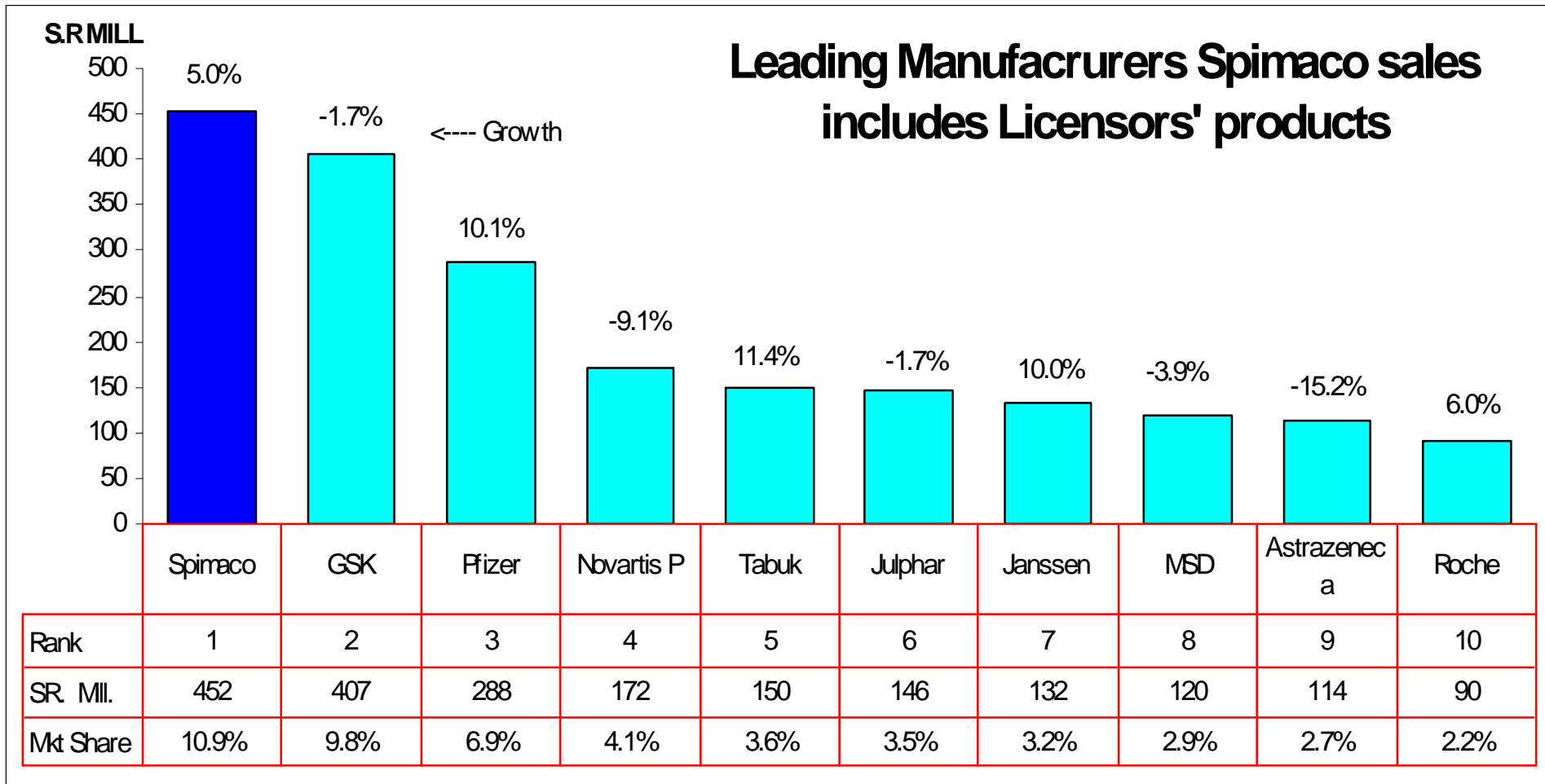
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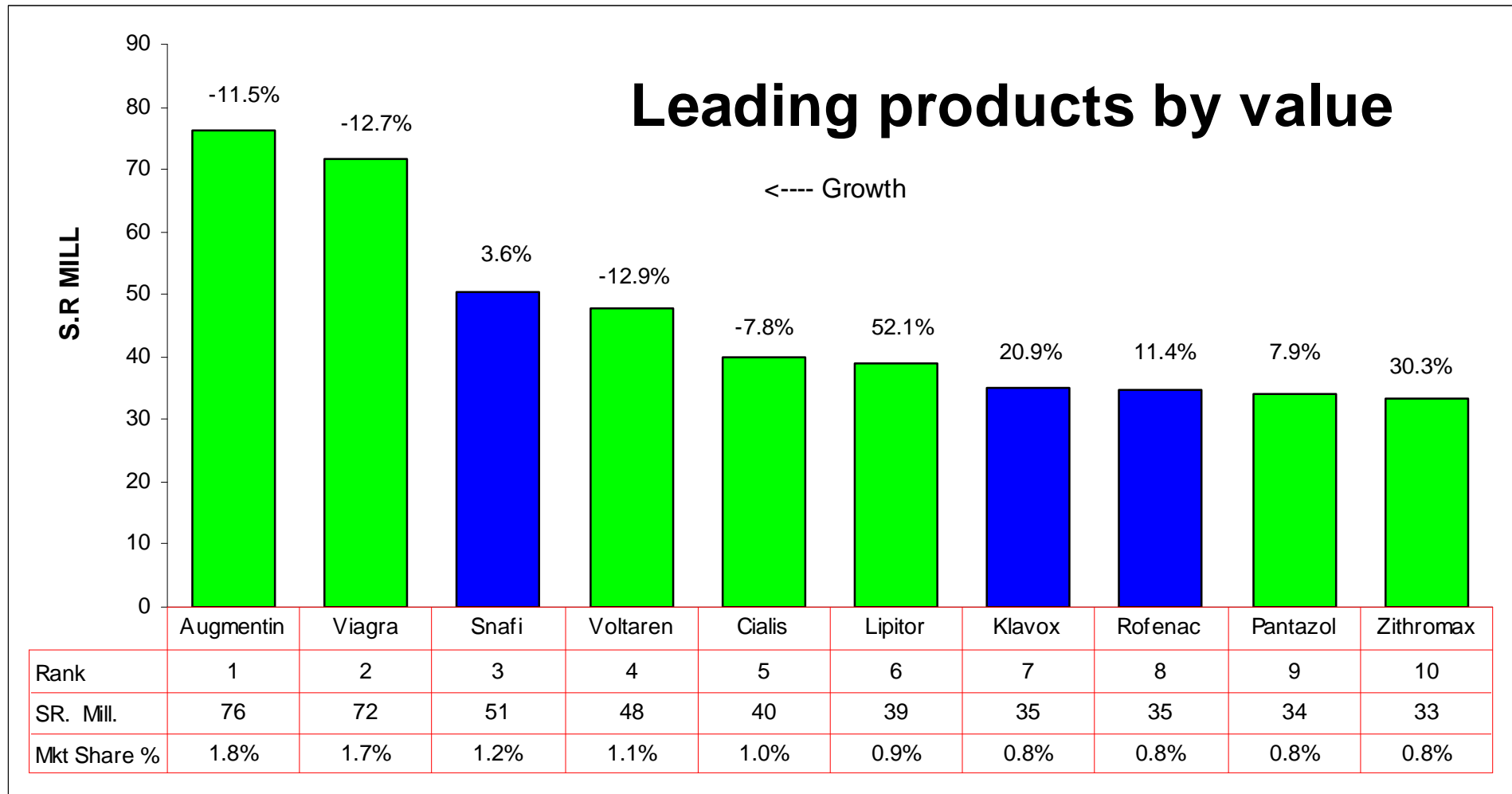
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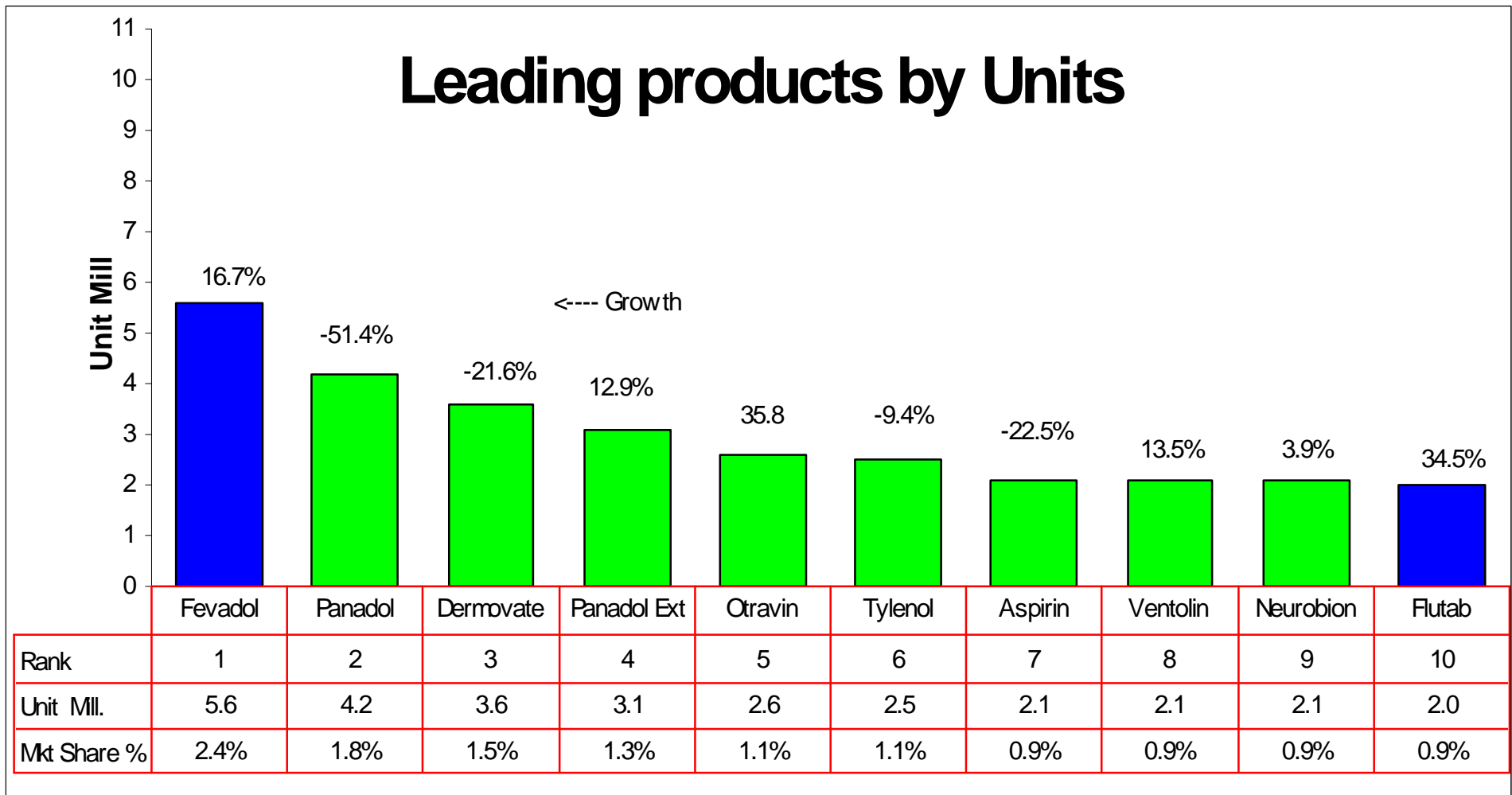
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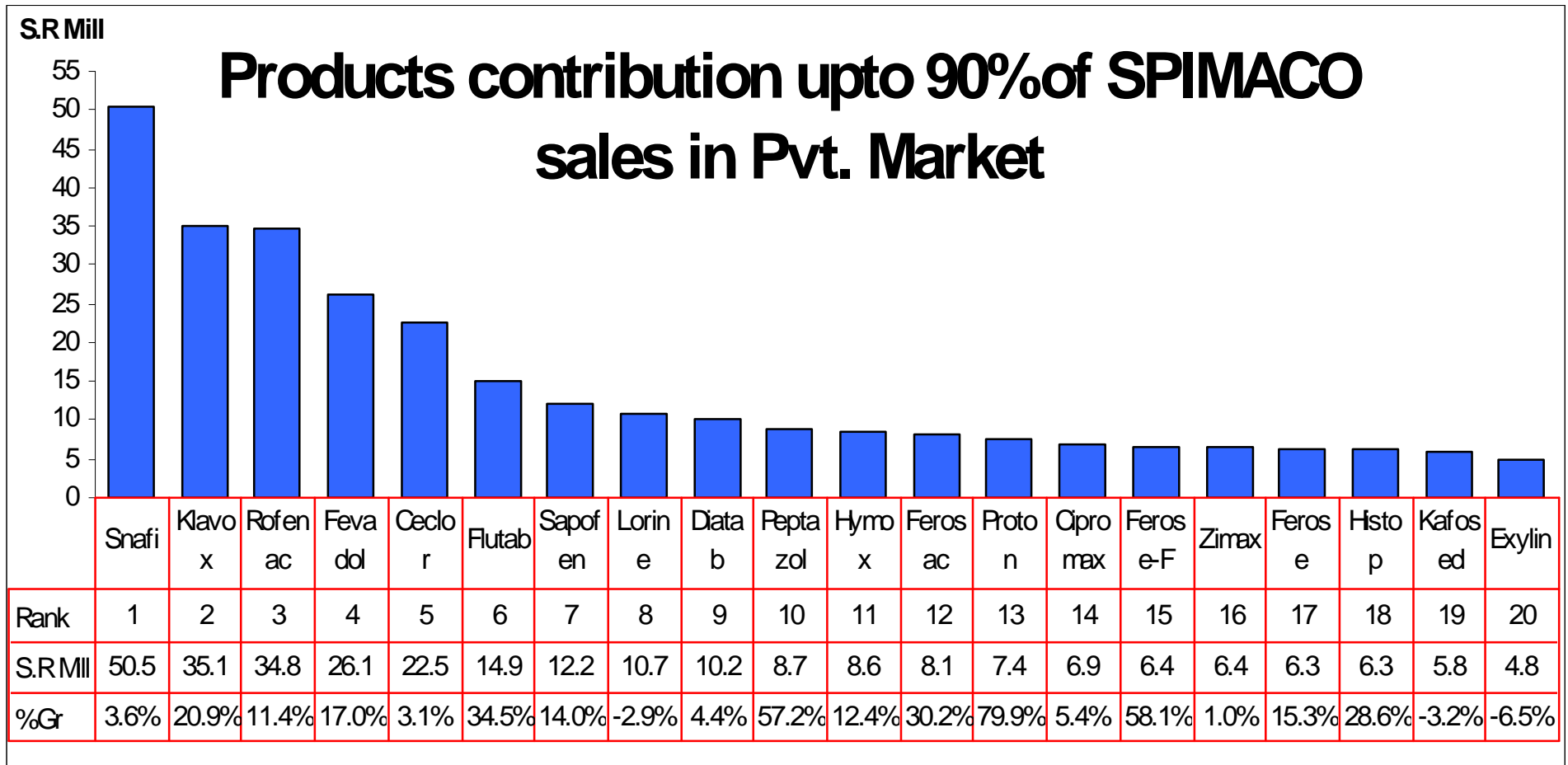
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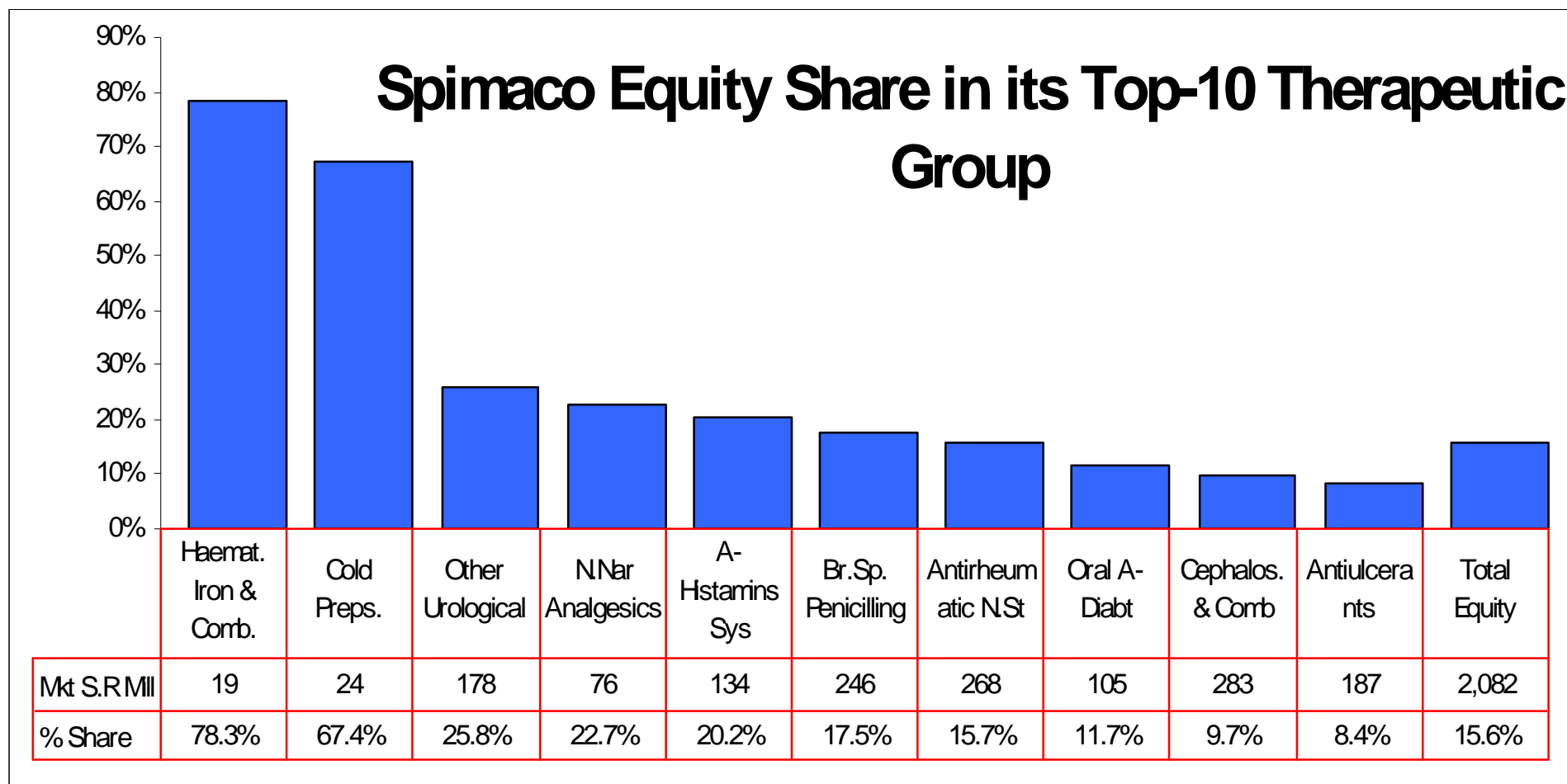
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HIGHLIGHTS:

- With Licensors' products SPIMACO maintained No.1 position in KSA Pharma Market.
- Among the Top-10 Manufacturers, SPIMACO is the fastest growing company with a rate of 13.3 %.
- SPIMACO sales grew by SR 38 Mill. Major contributors are as follows:

<u>PRODUCTS</u>	<u>CONT. IN MILL</u>
KLAVOX	6.1
FEVADOL	3.8
FLUTAB	3.8
ROFENAC	3.5
PROTON	3.3
PEPTAZOL	3.2
FEROSE-F	2.3

- Among Top-10 Manufacturers, 5 companies are in decline. Out of them 4 are multinationals.
- By unit Flutab entered in top-10 with a position of No.10 while Fevadol remains at the top No.1
- By value, and compared to MAT Q4'04, Klavox has improved its position from 9th to 7th and pushed back Rofenac from 7th to 8th
- By value Snafi, Klavox and Rofenac are in Top-10 products with +ve growth.
- Ferosac and Flutab are leading brand, whereas Snafi, Kafosed, Rofenac Gel, Klavox, Ceclor, Lorine, Rofenac, Ferosac-F and Orasept are 2nd. Zimax, Ferosac, Fusiderm, Cipromax and Fevadol S.F are 3rd leading brand in their respective classes. In pediatrics Fevadol S.F is No. 1 antipyretic syrup.