

FLASH SALES REPORT– Q2'2005

Saudi Pharma Market (Private)

Source : IMS Q2'05

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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.

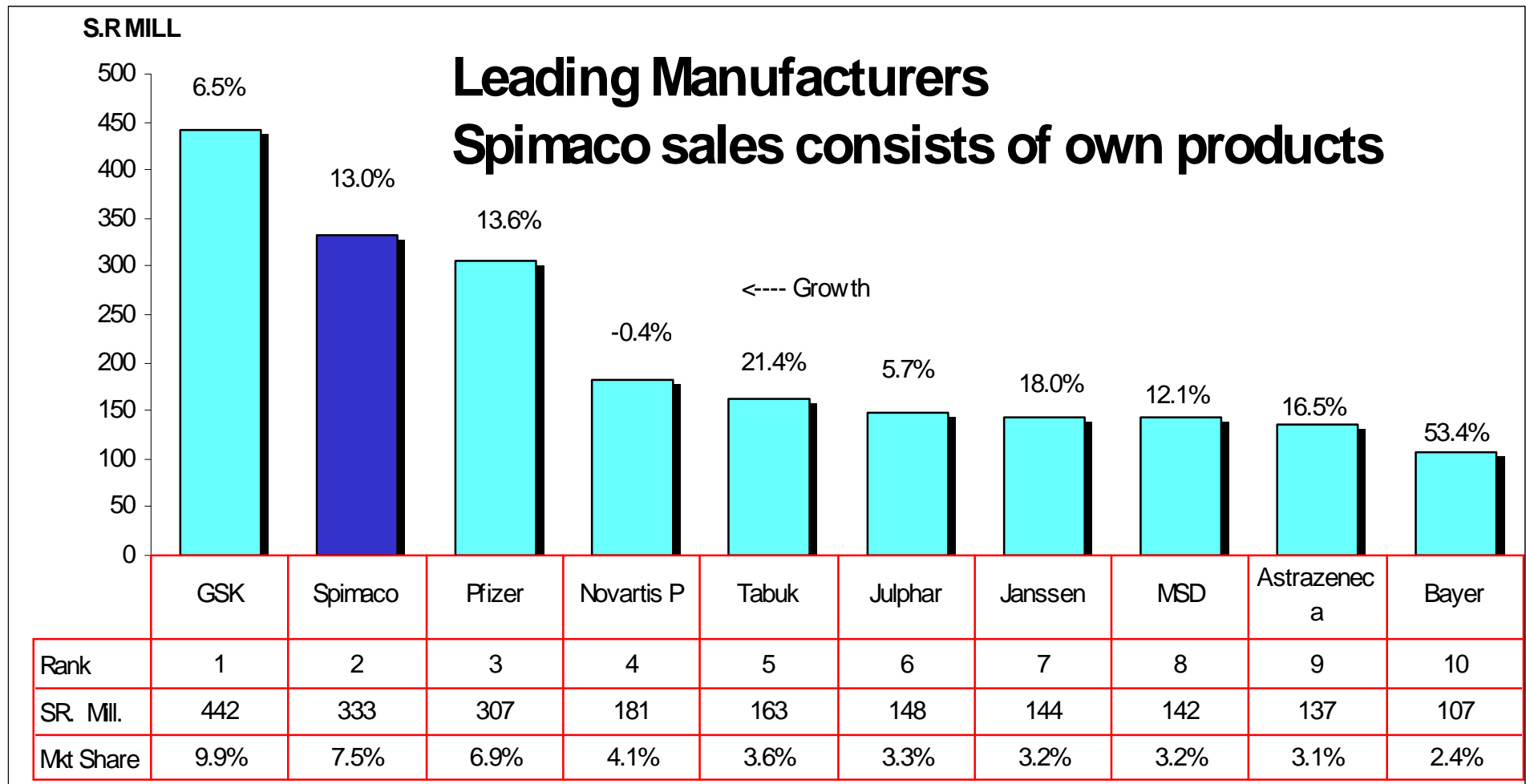
HIGHLIGHTS: -

Marketing & Business Development Deptt.

- . Total sales of the market is SR 4457.3 Millions with a growth of +14.3%
- . Top ten manufacturers constitute 47.2% of Saudi Pharma (Private) Market
- . Spimaco growth is 13.0% with 2nd position in Saudi Pharma (Private) Market

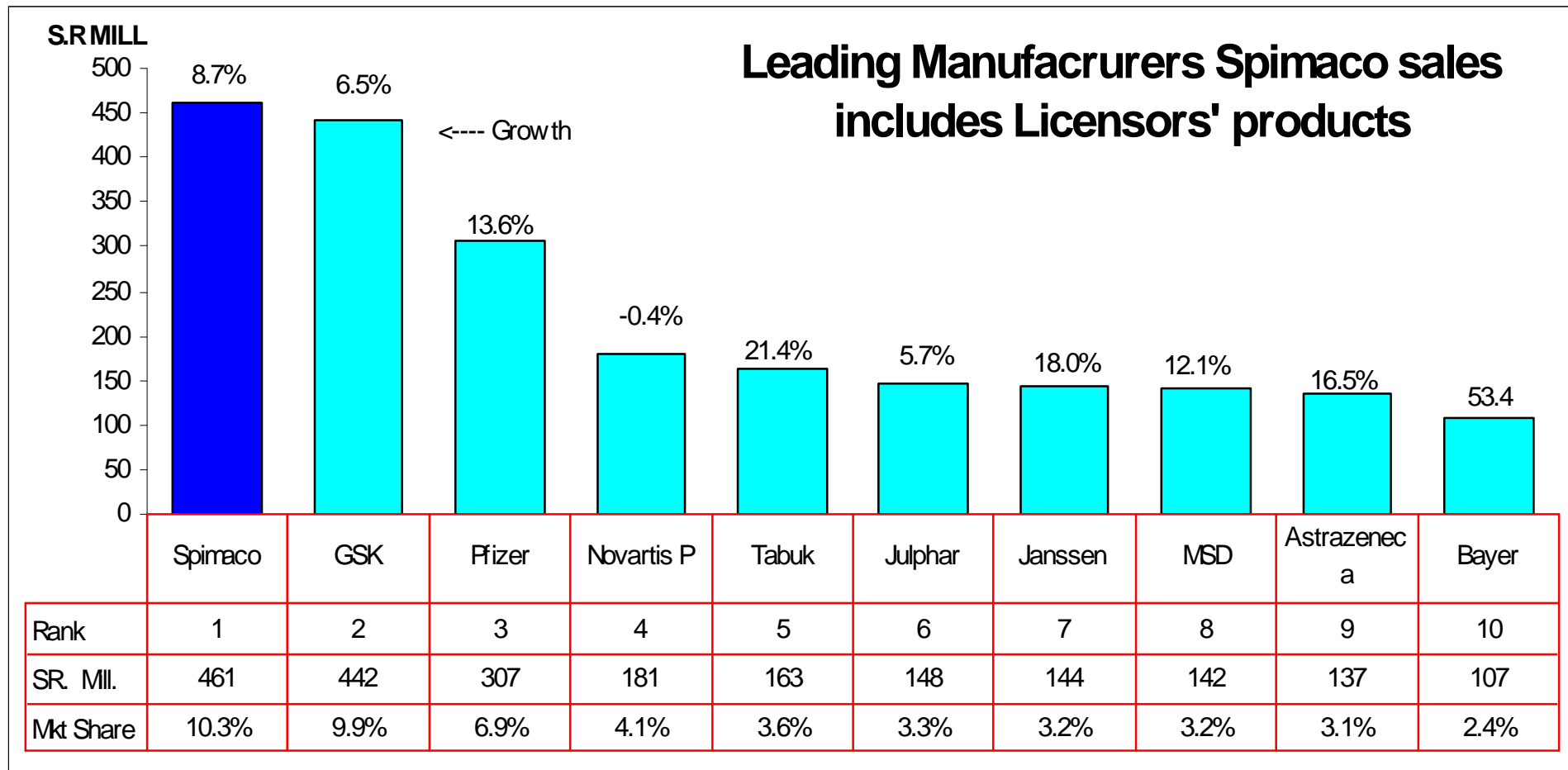
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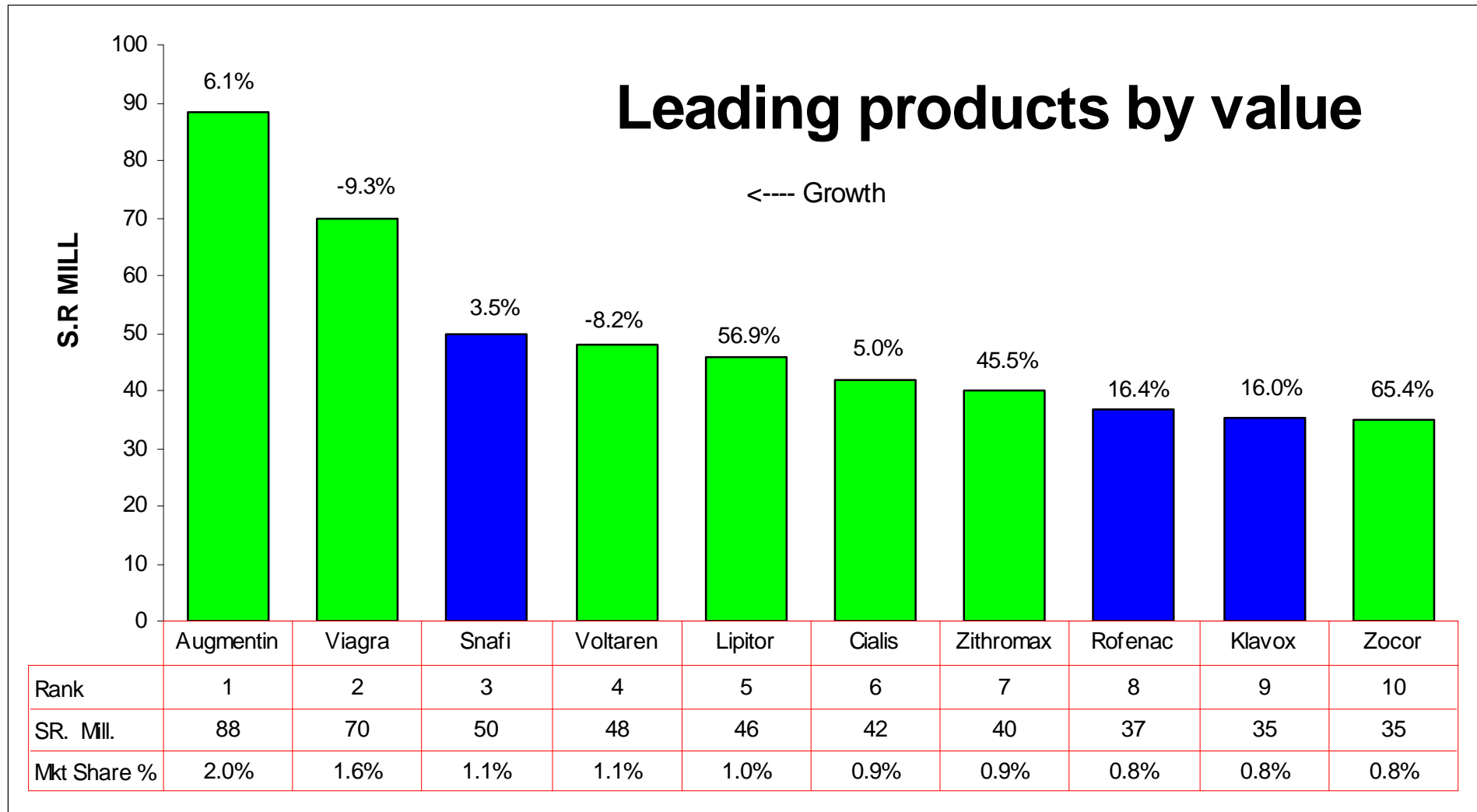
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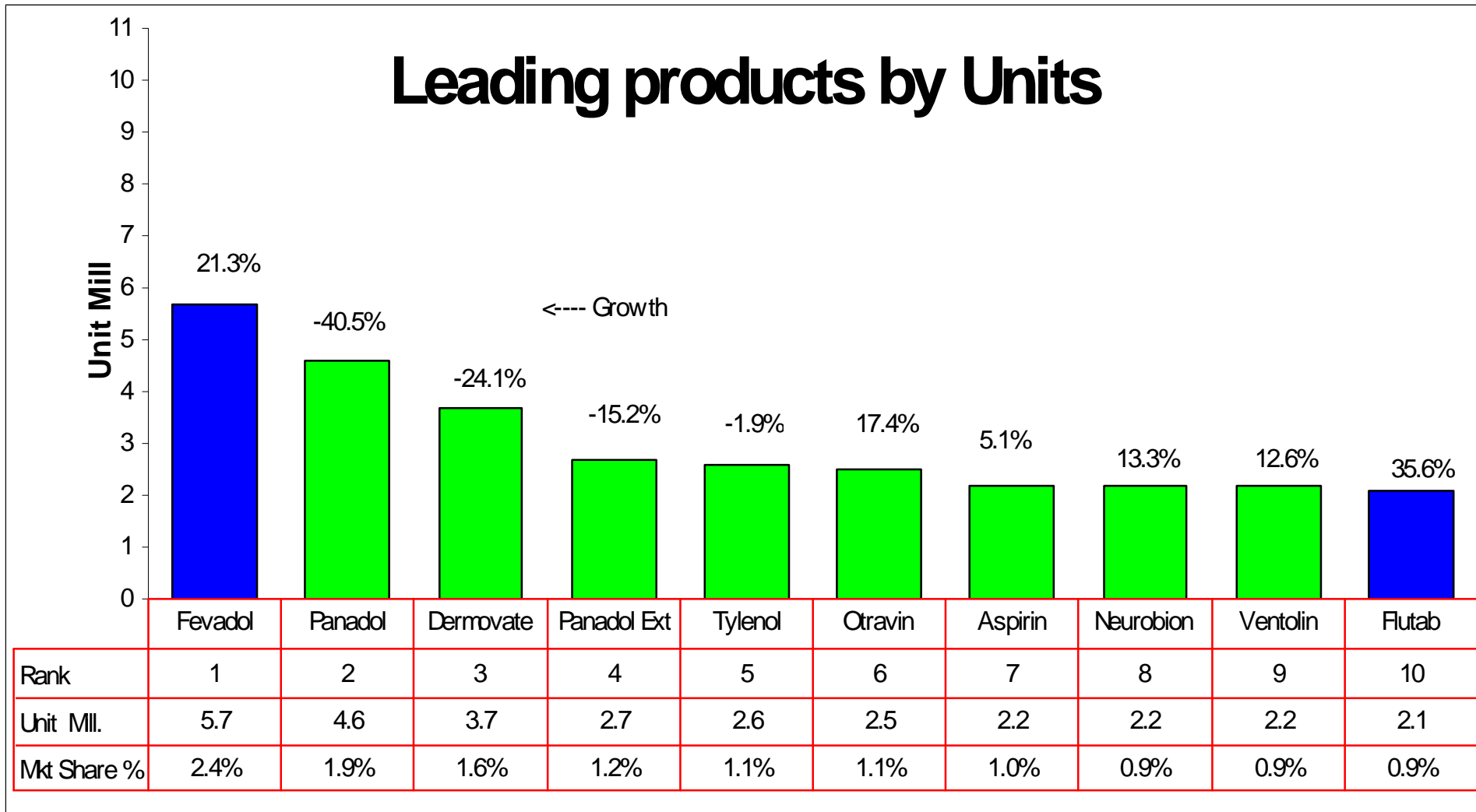
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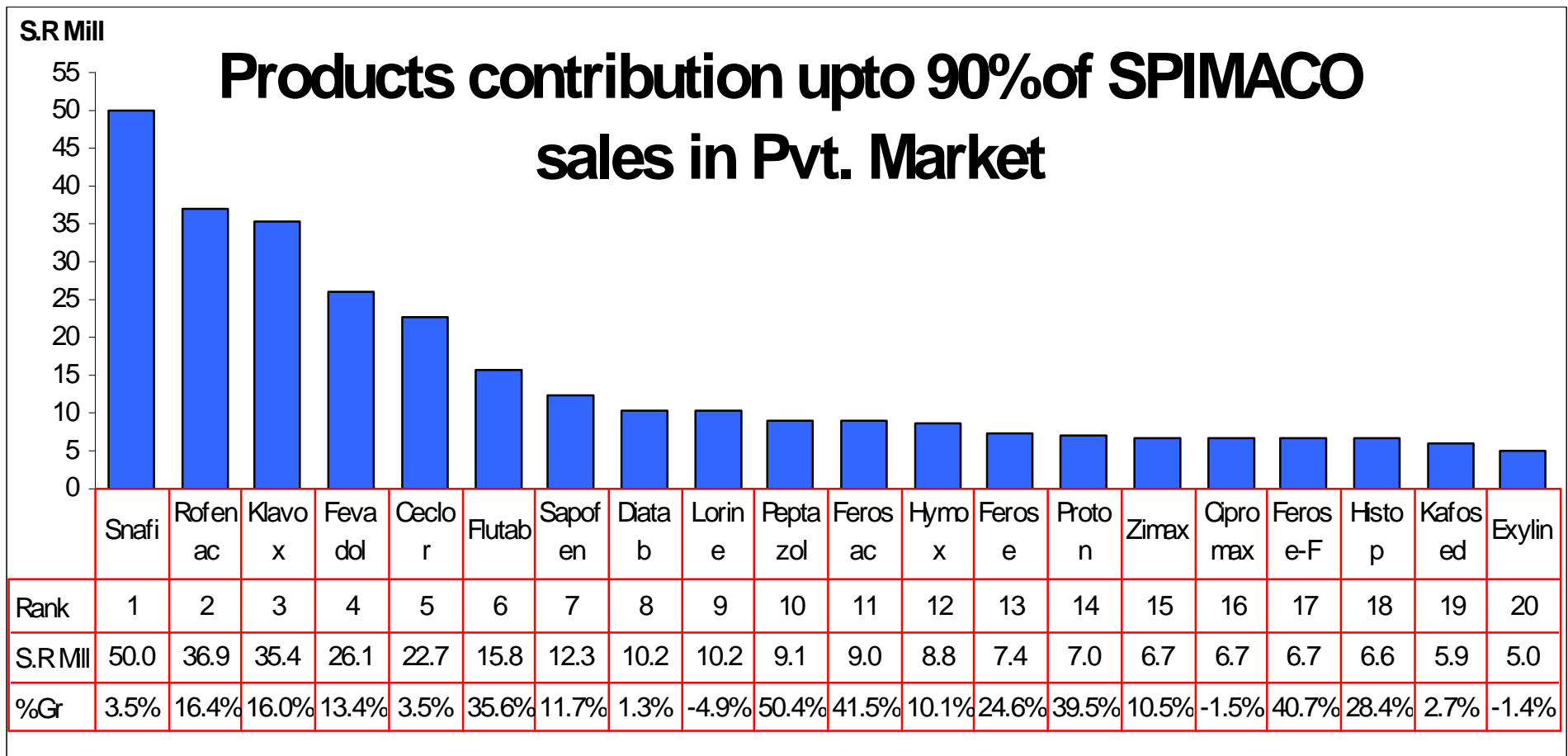
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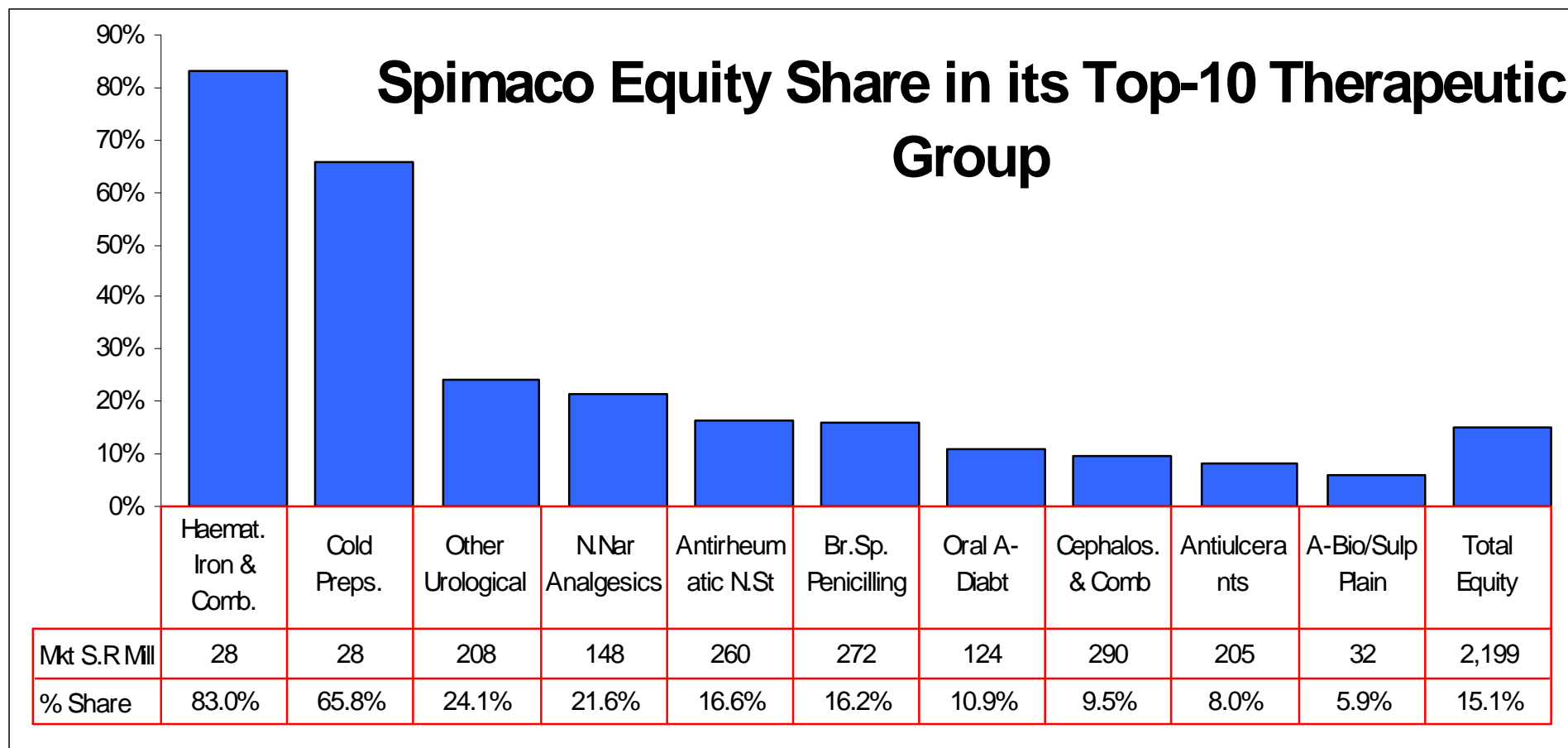
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HIGHLIGHTS:

- With Licensors' products SPIMACO maintained No.1 position in KSA Pharma Market.
- SPIMACO sales grew by SR 38 Mill. Major contributors are as follows:

<u>PRODUCTS</u>	<u>CONT. IN MILL</u>
ROFENAC	5.2
KLAVOX	4.9
FLUTAB	4.1
FEVADOL	3.5
PEPTAZOL	3.0
FEROSAC	2.7
PROTON	2.0
FEROSE-F	2.0

- KSA Pharma Market has shown highest growth in the history from 1997 i.e 14.3% .
- Among Top-10 Manufacturers, BAYER is at top in growth 53.4% (37.3 Mill). Levitra, Ciprobay and Avalox contributed 29, 10 and 7 million respectively. They pushed Bayer from rank 13th to 10th in KSA pharma market compare to last year same period.
- By unit Fevadol is No.1 while Flutab is at 10th position. In 1st 10, top growing with 21% and 36% .
- By value Zocor, Lipitor and Zithromax are top three in growth 65% , 57% and 46% respectively.
- By value Snafi, Rofenac and Klavox are in Top-10 with position 3rd, 8th and 9th likewise.
- Ferosac and Flutab are leading brand, whereas Snafi, Kafosed, Rofenac Gel, Klavox, Ceclor, Rofenac, Ferose and Orasept are 2nd. Zimax, Lorine, Ferose-F, Cipromax, Florosept and Fevadol S.F are 3rd leading brand in their respective classes. In pediatrics Fevadol S.F is No. 1 antipyretic syrup.